Sugar Sell 11.3 Application Guide

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The Sugar Application Guide covers the user-facing functionality of Sugar's CRM system.

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Introduction

Overview

Welcome to Sugar Sell - a commercial 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, 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
- Quoted Line Item management to capture the details of your organization's goods and services

Marketing Tools

- 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

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

Reporting

- Report creation and management to gain insight into your organization's Sugar data

- Home page dashlets to display important tables and reports

Sugar Serve Functionality

Sugar Serve is a product geared to enhance the abilities of a successful customer support organization. While there are many modules that are common across products, there are a few unique modules that a Sugar Serve user will be able to access. To learn more, please review the License Types matrix on the User Management page and our Sugar Serve Documentation.

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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). 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) available when first getting started with Sugar and accessing your account.

Note: For instances that use SugarIdentity, certain configuration options (e.g., editing certain user fields) will not be available. These differences are covered in the following sections.

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) is required on

your computer. 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

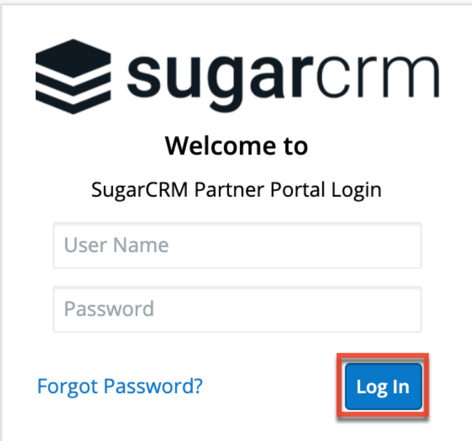
Refer to the appropriate section below for steps on logging in to your Sugar instance.

Standard Login

Use the following steps to log in to your Sugar instance:

Note: The following steps pertain to instances that do not use SugarIdentity as well as instances that use SugarIdentity.

1. Enter your Sugar instance URL (e.g., https://example.sugarondemand.com) in your web browser to access Sugar's login screen.
2. Enter your Sugar login credentials (User Name and Password) on the login screen then click "Log In".
    - If you do not know your instance URL or login credentials, please reach out to your system administrator for assistance.
    - If your Sugar instance is configured for single sign-on (SSO) (e.g., SAML), then the login screen will display a separate login button where you will enter your identity provider (e.g., Okta) login credentials to be authenticated and automatically logged in to your Sugar account.

3. The New User Wizard will launch upon your first successful login to Sugar allowing you to configure some of your basic personal settings.
Note: For instances that use SugarIdentity, the User Profile step of the

User Wizard is read-only and the displayed fields (e.g., First Name, Last Name) will not be editable in your user profile as they can only be edited by administrators in SugarIdentity via the SugarCloud Settings console.

Note: If your instance has more active users than is allowed by your Sugar license, regular users will not be able to log in and a warning will be displayed on the screen once the user attempts to log in. Admin users will be able to log in but will be redirected to the Users module. For more information, see the Understanding User Types, License Types, and Sugar Licenses article.

Logging in With SugarIdentity Using Multi-Factor Authentication

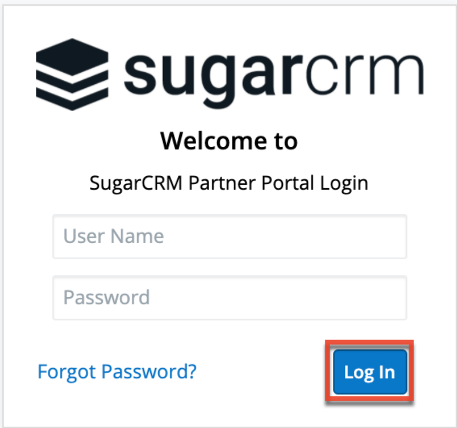
For instances that use SugarIdentity, administrators can enable multi-factor authentication, which provides an added layer of security when logging in to Sugar to prevent unauthorized users from gaining access to your account. If multi-factor authentication is enabled for your Sugar instance, you will need to use a mobile authenticator app (e.g., Authy, Google Authenticator, Microsoft Authenticator) and enter the 6-digit code generated from the app to verify your identity when logging in to Sugar. Please note that multi-factor authentication only applies to users who log in using Sugar credentials or use LDAP authentication.

Once multi-factor authentication is enabled for your Sugar instance, the following Sugar products will also use multi-factor authentication when logging in using SugarIdentity:

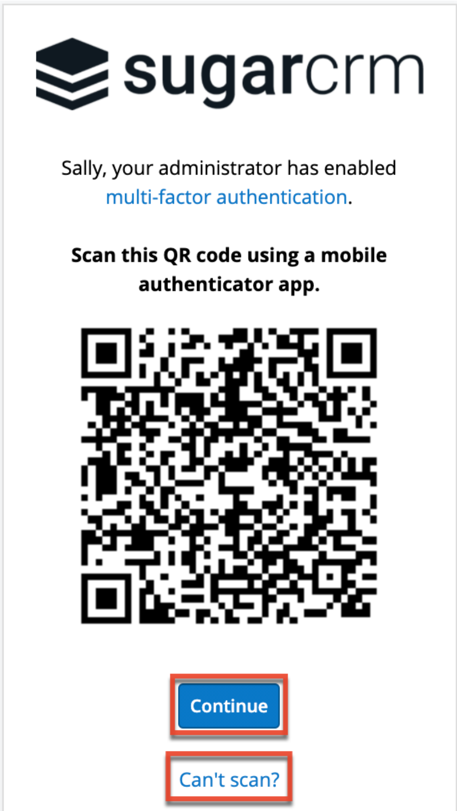
- Sugar Mobile
- Sugar Connect
- Sugar Plug-in for Outlook
- Sugar Discover

Use the following steps to log in to Sugar using multi-factor authentication:

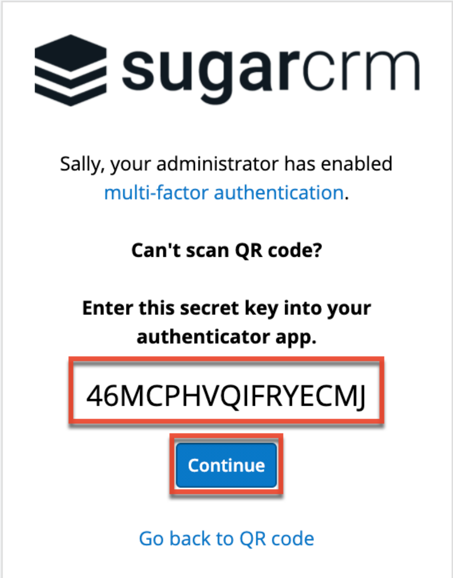
1. Enter your Sugar instance URL (e.g., https://example.sugarondemand.com) in your web browser to access Sugar's login screen.
2. Enter your login credentials (User Name and Password) on the Sugar login screen, then click "Log In".



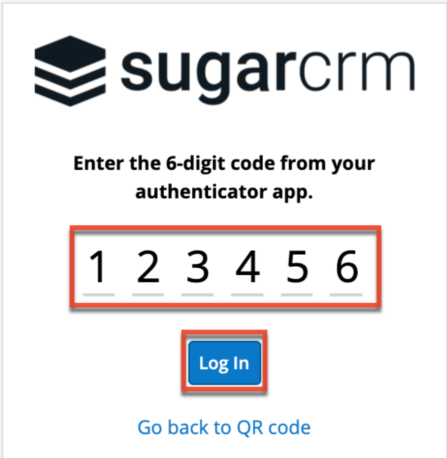
3. If this is your first time logging in after multi-factor authentication has been enabled or reset, a QR code will appear on the screen. Scan the QR code using your authenticator app (e.g., Google Authenticator) to pair the app with Sugar. Click "Continue". If you cannot scan the QR code using your mobile device, skip to step 4.
   Note: If you have already paired an authenticator app with Sugar, then skip to step 5.

4. If you cannot scan the QR code on step 3 using your mobile device, click the "Can't scan?" link and enter the secret key that appears on the screen into your authenticator app. Click "Continue".



5. On the next step, enter the 6-digit code generated from your authenticator app, then click "Log In" to access your Sugar account.
   Note: Once your authenticator app is paired with Sugar, for future logins, you will just be required to enter a new 6-digit code on this screen after entering your login credentials on step 2.



6. The New User Wizard will launch upon your first successful login to Sugar allowing you to configure some of your basic personal settings.
   Note: For instances that use SugarIdentity, the User Profile step of the User Wizard is read-only and the displayed fields (e.g., First Name, Last Name) will not be editable in your user profile as they can only be edited by administrators in SugarIdentity via the SugarCloud Settings console.

If you ever need to reset your multi-factor authentication, for example, to set up the authenticator app on a new mobile device, select the Reset Multi-Factor Auth option under your user menu on the upper right of Sugar. For more information, refer to the Resetting Multi-Factor Authentication section of this page.

Resetting Your Password

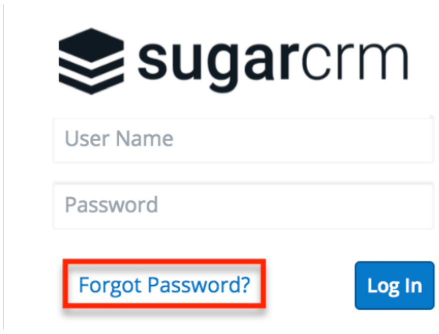
There may be occasions when users forget their Sugar password and will need to reset it. If the system administrator has enabled the Forgot Password feature via Admin > Password Management, users will have the option to request a password reset directly from Sugar's login screen. If you do not see the "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, 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 temporary password information to be emailed. For more information on setting up the system email settings, refer to the Email documentation in the Administration Guide.

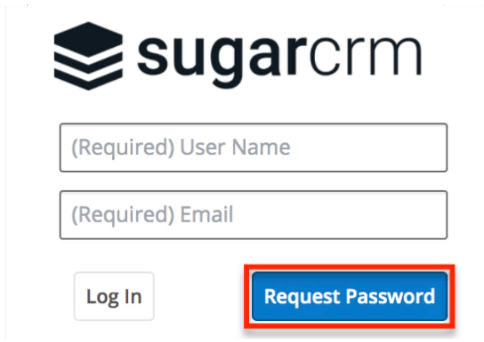
Note: For Sugar instances that use SugarIdentity, administrators will not be able to configure the Forgot Password option, change the user's password, or manually send a system-generated password to the user.

Resetting Your Password Without SugarIdentity

The following steps cover requesting a new password to receive a temporary system-generated password for a Sugar instance that does not use SugarIdentity:

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

2. Enter your Sugar user name and primary email address on file, then click "Request Password". If submitted successfully, a message will appear that your request has been submitted.

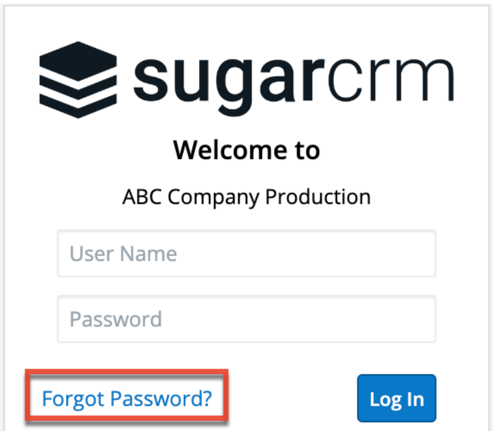


3. A temporary password will be emailed to your primary email address.
   Note: If the administrator has disabled the System-Generated Passwords feature, then the password reset email will instead contain a link you can click to reset your password.
4. Enter the temporary password into Sugar's login screen.
   Note: Be sure to change your password once logged in by navigating to the Password tab in your user preferences.

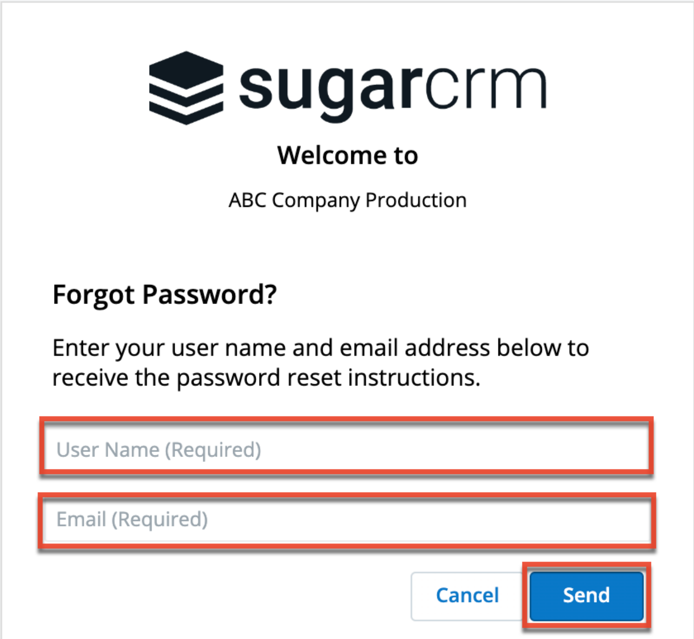
Resetting Your Password With SugarIdentity

Use the following steps to reset your password in a SugarIdentity-enabled instance:

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



2. Enter your Sugar user name and primary email address on file, then click "Send". A message will appear confirming that the password reset email has been sent to your primary email address.



3. Click the password reset link in the email and you will be directed to the password reset page.
4. Enter your new password and confirmed password making sure to meet the password requirements listed on the screen. Click "Change password" then click the Log In button on the following dialog box if you wish to log in to your account.
   Note: System administrators can configure the password requirements in SugarIdentity via the SugarCloud Settings console.

Note: System administrators also have the ability to send password reset emails to users via the SugarCloud Settings console.

Setting Your Language

Users have the option to choose the primary language they want to be displayed in Sugar by clicking the Language link on the bottom right of the Login screen. The Language dropdown list will appear allowing you to select the appropriate language you want to be displayed in your Sugar account. 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.

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.

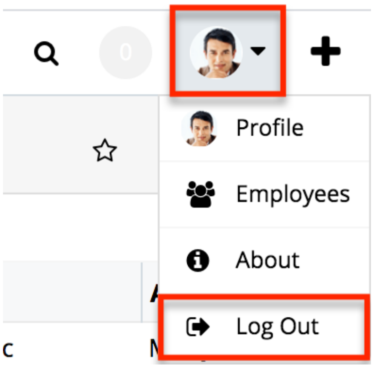
The following languages are available for use in Sugar:

Albanian	Hungarian
Arabic	Italian
Brazilian Portuguese	Japanese
Bulgarian	Korean
Catalan	Latvian
Chinese (Simplified)	Lithuanian
Chinese (Traditional)	Norwegian
Croatian	Polish
Czech	Portuguese
Danish	Romanian
Dutch	Russian

English (UK)	Serbian
English (US)	Slovak
Estonian	Spanish
Finnish	Spanish (Latin)
French	Swedish
German	Thai
Greek	Turkish
Hebrew	Ukrainian

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 select "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. There are several valid and expected reasons that this may occur, primarily for security purposes. For more information and steps to troubleshoot this behavior, please refer to the Troubleshooting Sugar Logging Out Unexpectedly Knowledge Base article.

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. For example, this is useful when working with multiple Sugar pages or records without navigating away from previous pages.

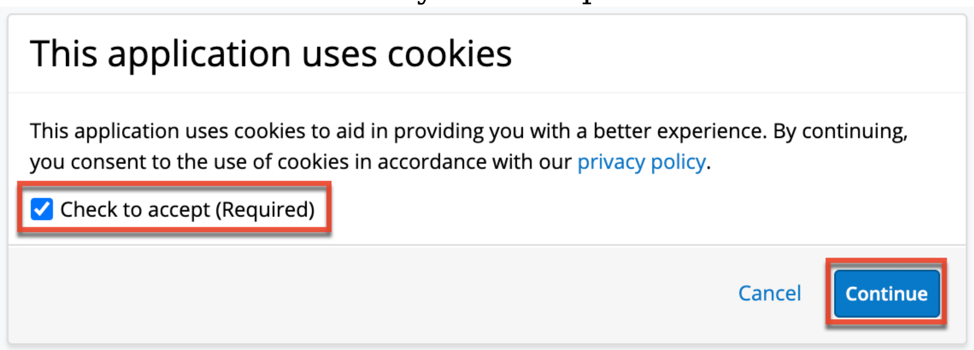
New User Wizard

When users first log in to Sugar, they will step through the New User Wizard to configure some basic settings (i.e., User Profile and User Locale Settings). 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.

Note: For instances that use SugarIdentity, the User Profile step of the User Wizard is read-only and the displayed fields (e.g., First Name, Last Name) will not be editable in your user profile as they can only be edited by administrators in SugarIdentity via the SugarCloud Settings console.

Accepting Cookies

In order to log in to Sugar, you must accept the use of cookies in the application. You will only be asked to accept the first time you log in, and any time there are changes to the privacy policy. To accept, enable the checkbox option then click "Continue" to advance to your user profile information.



Configuring Your Information

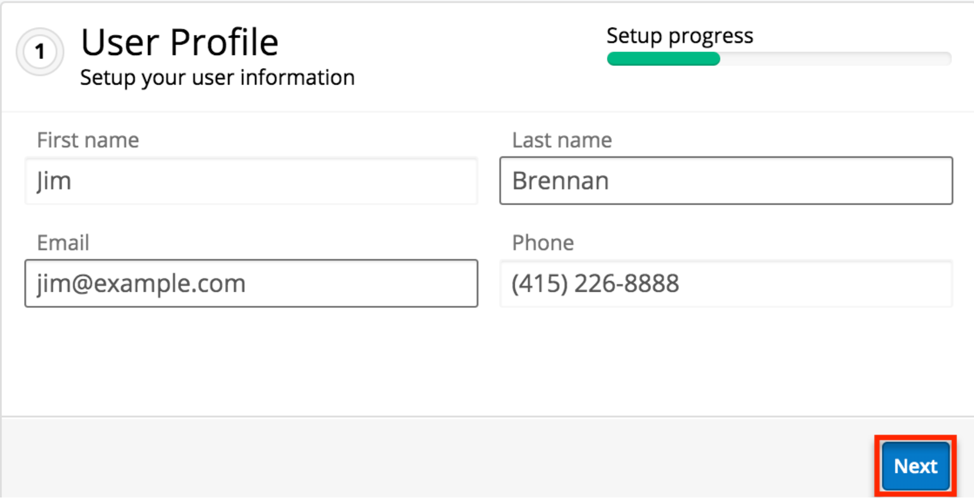
The User Profile step of the New User Wizard allows you to enter basic information (e.g., name, email address, phone) about yourself to be stored in your user profile. Please note that the information provided in this step can be updated in your user preferences at a later time if desired. For more information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

Note: For instances that use SugarIdentity, the User Profile step is read-only and the displayed fields (e.g., First Name, Last Name) will not be editable in your user profile as they can only be edited by administrators in SugarIdentity via the SugarCloud Settings console.

The following options are available to configure your user profile:

- **First Name**: Enter your first name.
- **Last Name**: Enter your last name.
- **Email**: Enter your primary email address.
- **Phone**: Enter your office number.

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



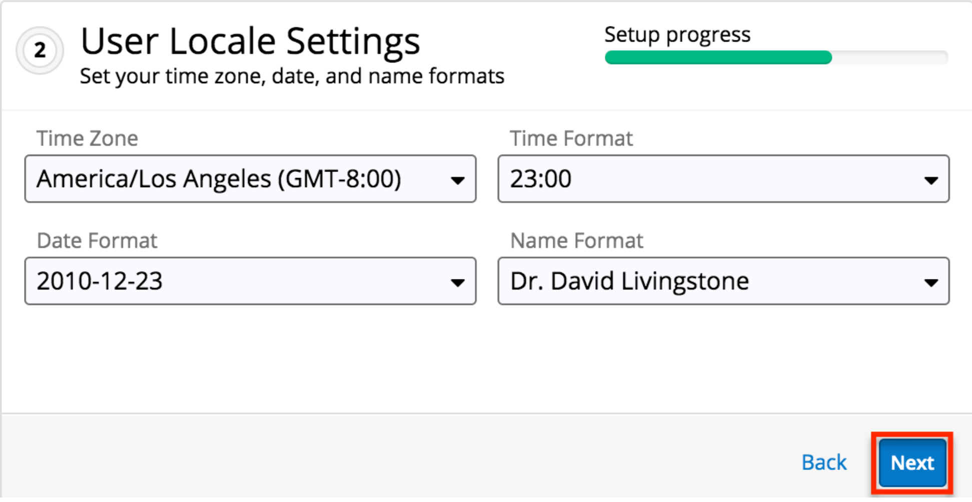
Configuring Your Locale

The User Locale Settings step allows you to configure the date, time, and name format you want to be 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.

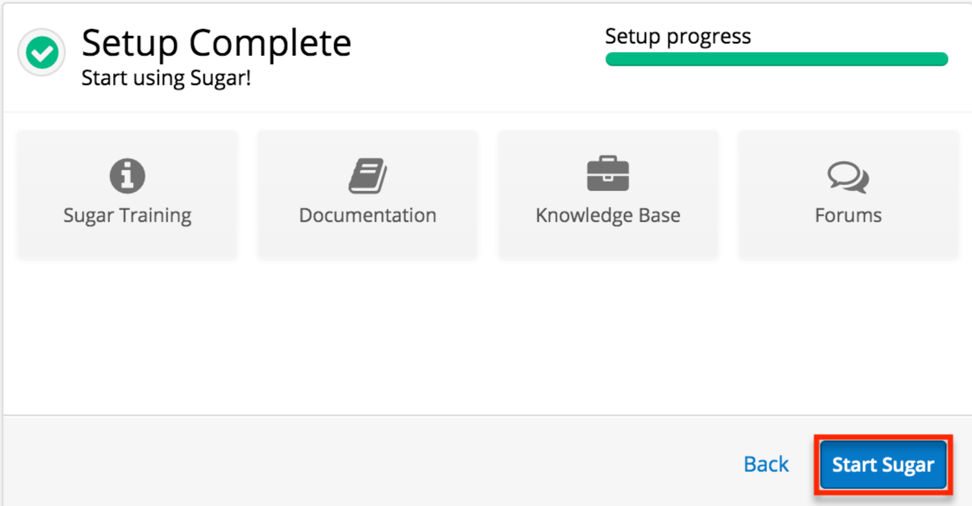
The following options are available to configure your locale settings:

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

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

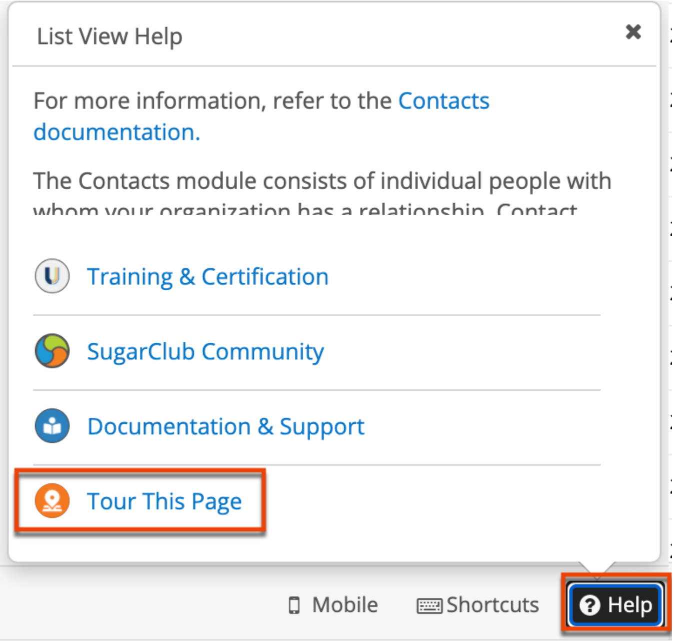


The following page will confirm that your setup is complete and that you are ready to use Sugar. You can access the various support resources (e.g., Documentation, Knowledge Base) available by clicking one of the boxes in the dialog box. Please note that you can click "Start Sugar" to go directly into your Sugar account.



Tour

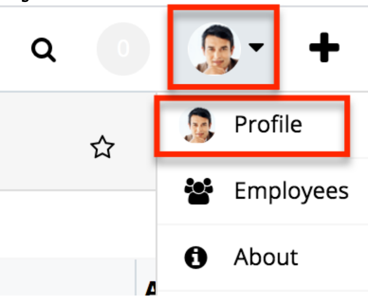
You can launch the Welcome to Sugar tour on the Home page to see key features of the user interface. Simply click the Help link in Sugar's footer then click "Tour This Page" in the help pane. The Welcome to Sugar window will appear and include links that provide access to additional resources (e.g., training, documentation). Click the appropriate link in the window to be directed to the specific page (e.g., Support page) in a separate tab. To begin the tour, simply click the Right arrow and a bubble will appear to point out the various parts of the application such as where to access the dashboard and activity stream, perform a global search, etc. You can click the Left arrow at any time during the tour to go back through the key features again. Once you have completed viewing the tour, click the Done button to exit the tour. Please note that you can launch the tour again by clicking the Tour link in Sugar's help pane at any time. For more information regarding the Tour link, please refer to the User Interface documentation. As you navigate around Sugar, you can launch the tour for any of the Sidecar modules (e.g., Accounts, Leads, Contacts) by clicking the Tour This Page link in the help pane to view key features of the list view and record view.



User Preferences

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

Note: For instances that use SugarIdentity, certain fields (e.g., First Name, Last Name, Work Phone, Title) in the user's profile are read-only and can only be edited by administrators in SugarIdentity via the SugarCloud Settings console.



User Profile Tab

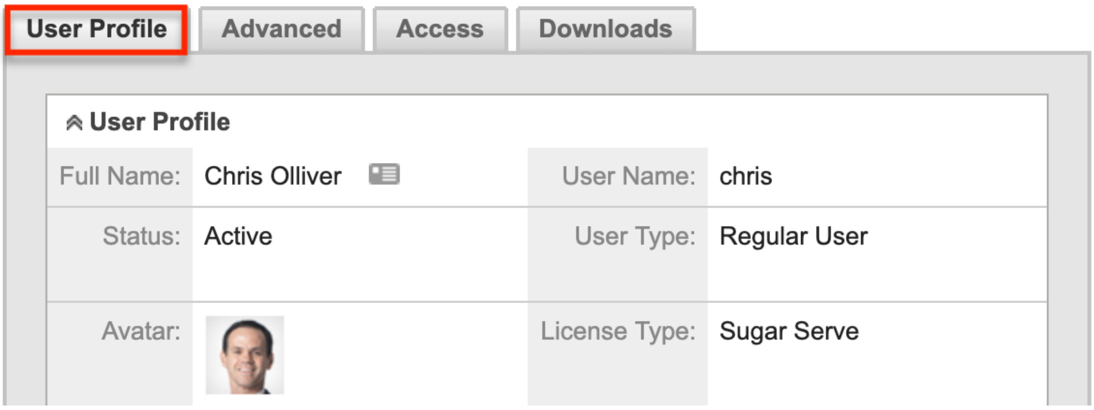
The User Profile tab displays basic information such as your name, license type, email address, etc. If the New User Wizard was completed, the information you entered will appear under the User Profile tab. For Sugar instances that use SugarIdentity, the User Profile step of the User Wizard is read-only and the displayed fields can only be edited by administrators in SugarIdentity via the SugarCloud Settings console. 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 is 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.

For instances that use SugarIdentity, the following fields under the User Profile tab are read-only and can only be edited by administrators in SugarIdentity via the SugarCloud Settings console:

- First Name
- Last Name
- Work Phone
- Address Street
- Address City
- Address State
- Address Postal Code
- Address Country
- Primary Email Address

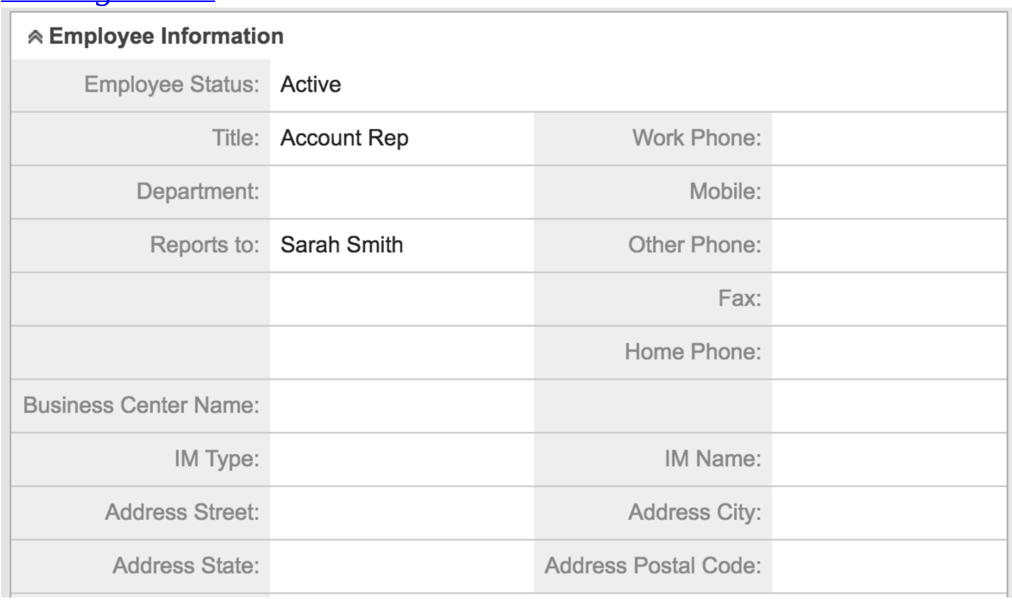
User Profile

The User Profile section displays your Sugar name, user name, status, user type, avatar, and license type. Of these fields, regular users can only modify First Name, Last Name, and Avatar; the rest are set by Sugar administrators as described in the User Management documentation. Each user must have one or more Sugar products selected in their License Type fields. This field controls what functionality you may access. When working in Sugar or learning about the features available to you, view your profile to confirm your license type(s). A list of functionality available for each license type is listed in the User Management documentation.



Employee Information

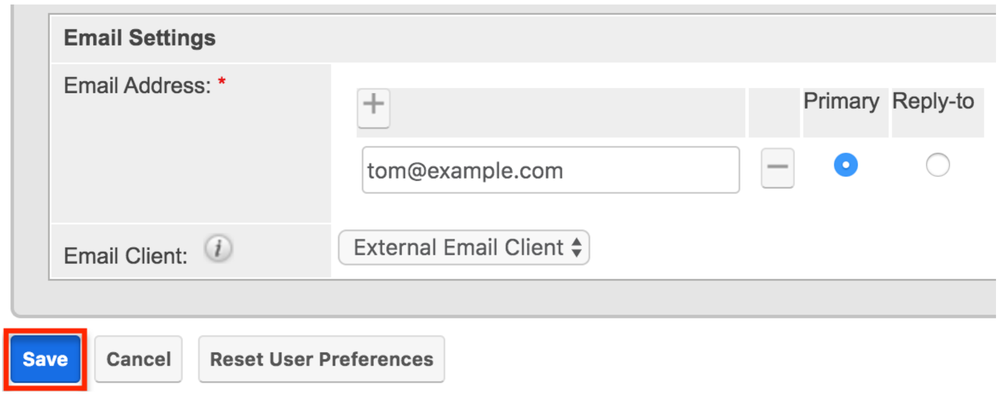
The Employee Information section displays your employee status, title, phone number, address, etc. If you completed the Your Information step of the New User Wizard, the information you entered will appear in this section. You can update your address, phone number (e.g., Work Phone, Mobile), description,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



Email Settings

The Email Settings section contains your primary email address and preferred method for sending mail from Sugar.

Note: For instances that use SugarIdentity, the user's primary email address can only be edited by administrators in [SugarIdentity](#) via the SugarCloud Settings console.



The Email Settings section contains two fields:

- **Email Address**: Enter your primary email address.
    - Sugar refers to the primary email address in the user's profile to send messages such as password-reset emails, record-assignment notifications, and workflow alerts to users.
    - Users can add multiple email addresses in email settings, but only one can be marked "Primary".
    - If the administrator has enabled the system email account for users, the primary email address will be displayed when the user sends outbound emails via the system email account.
    - Outgoing email accounts (e.g., support@example.com) that are used to send outbound email messages will get added to the Email Address field as Sugar links the user to that email address since they used it to send an email message through Sugar.
- **Email Client**: Select how you would like to send email from Sugar.
    - **Sugar Email Client** (most common): To send messages through the Sugar application and automatically archive them in Sugar, you must select "Sugar Email Client" from the Email Settings section of your user profile. This is the default setting.
        - **Note**: To send email from Sugar, you must configure your outbound email server via Emails > Email Settings or, if using the system email account to send email, the system's outbound email server must be configured by an administrator via Admin > System Email Settings.
    - **External Email Client**: Users can choose this option if they would like to send email from an application outside of Sugar (e.g., Microsoft Outlook, Gmail). If you choose the External Email Client

option, emails sent to contacts, leads, etc. will not be saved in Sugar as archived emails unless you use the Sugar Email Archiving service (a.k.a. "SNIP") or Sugar Connect.

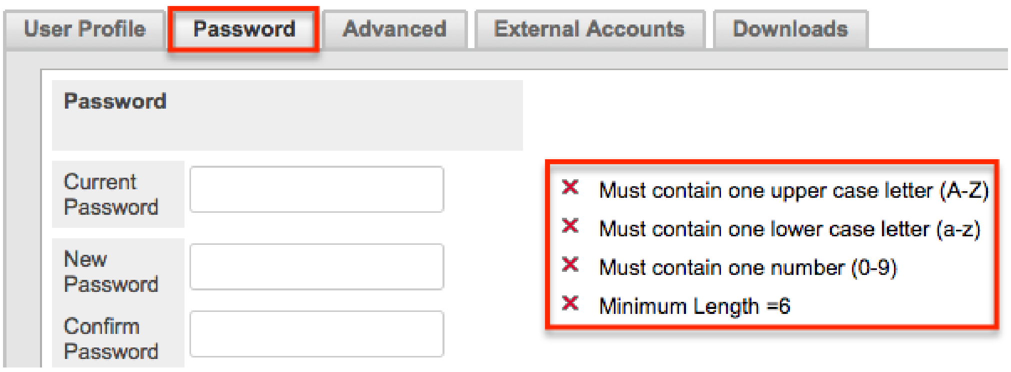
Note: The administrator may have configured the user's email settings when adding the user to the system, but the user can always edit the options in their profile.

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 passwords, system-generated passwords 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 administrators 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 passwords in Sugar on a regular basis is recommended for the security of your account.

Note: For Sugar instances that use Sugaridentity, users can reset their password by selecting the Change Password option under the user menu on the upper right of Sugar.

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 Password Requirements section of the Password Management documentation. Once you have entered the new password, click "Save" to preserve the change.

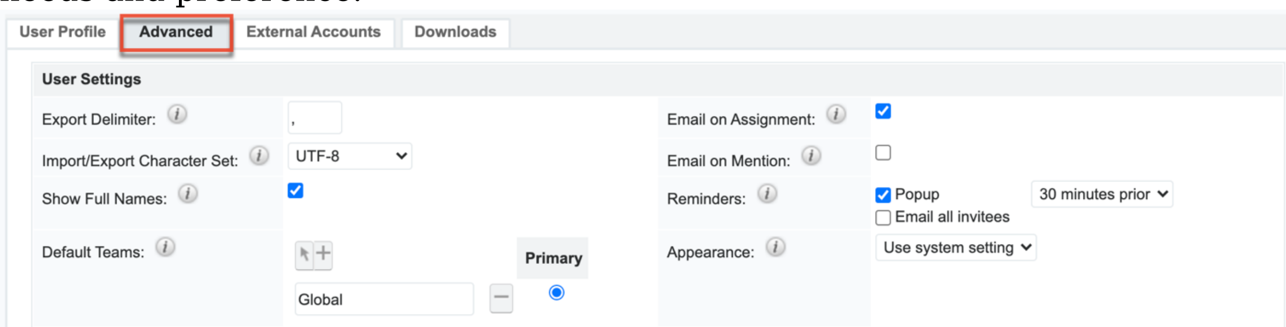


Advanced Tab

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 PDFs.

- **Show Full Names**: Select this option 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 fields, and on the upper right of your Sugar account.
- **Default Teams**: Select the default team(s) that will be automatically assigned to new records you create in Sugar. Whenever you create a record, the team is set as your default team, similar to how the "Assigned To" field is set to you. You can have any number of default teams. When selecting a default team set, you must select one team as the primary team and, if the Administrator has enabled team-based permissions, you may optionally indicate whether the teams on each set should be automatically set to "selected" (Additional Permissions Enabled).
- **Email on Assignment**: Enable this option to receive an email notification when a record is assigned to you by another user. Both the outbound mail server and personal email settings must be configured in order to receive the notification. For more information on configuring the outbound mail server, please refer to the Email documentation.
- **Email on Mention**: Select this option to receive an email notification every time your name is mentioned in a comment log.
- **Reminders**: Enable 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.
- **Appearance**: Choose which theme you want to use when viewing Sugar.
    - **Light**: A light and bright white-based theme
    - **Dark**: A theme based in blacks and grays, often preferred for nighttime viewing
    - **Use system setting**: The theme (light or dark) will respect whatever rule your computer or device has set up

Note: You can configure Sugar Mobile to send push notifications to your device for record assignments and comment log mentions, but note that the "Email on Assignment" and "Email on Mention" settings are independent of the mobile settings. Each must be configured separately.

Layout Options

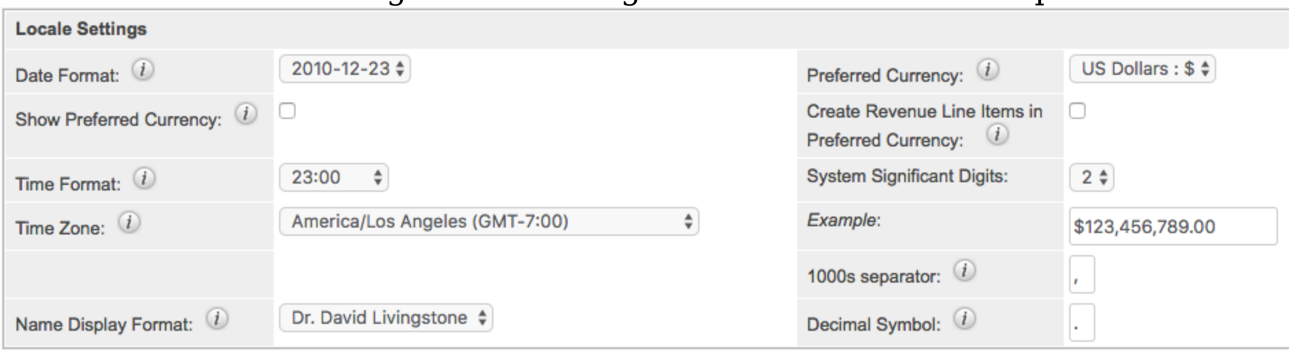
The Layout Options section allows users to select what modules they want Sugar to display or hide in the navigation bar.

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

- **Select Modules for Navigation Bar**: Select which modules will be displayed or hidden in the navigation bar by using the left and right arrows 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 arrows.
- **Field Name Placement**: Choose whether field names are displayed above or beside field values in record view; by default, field names are displayed beside the field value. This option does not apply to the Record View dashlet.

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 to be displayed in Sugar.
- **Show Preferred Currency**: Mark the checkbox to convert the base currency to user-preferred currency in list views and record views.
  Note: User-preferred currency is not used in the Quotes record view or for quoted line items. For more information, refer to the Quotes and Quoted Line Items documentation.
- **Time Format**: Select the format you want the timestamps to be displayed in Sugar.
- **Time Zone**: Select the time zone based on your current geographical location.
  - Please note that if the selected time zone is different from your browser's set time zone, a warning message ("Your browser's timezone does not match your saved timezone Adjust Your Timezone.") will appear upon your next log into Sugar. You can click the link in the warning dialog box to change the time zone in your user preference accordingly.
  - **Note**: This Time Zone setting only applies to modules using the Legacy user interface. Modules using the Sidecar user interface will utilize the browser's time zone.
- **Name Display Format**: Select the format you want the concatenated name fields displayed in Sugar's list view and record view.
- **Preferred Currency**: Select the default currency you wish to use when creating new records.
- **Create Revenue Line Items in Preferred Currency**: Mark the checkbox to use your preferred currency when creating revenue line items based on a product catalog item, rather than the default behavior of using the product catalog item's currency.
- **System 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.

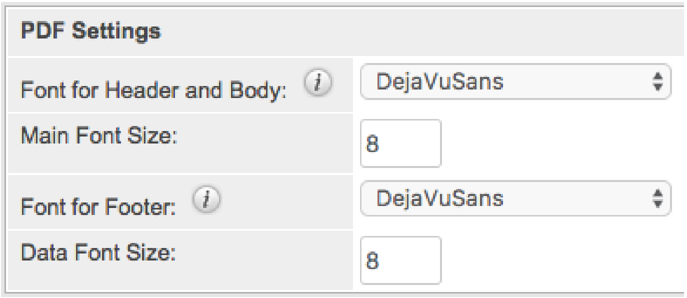
Note: The Quotes and Revenue Line Items modules are not available for Sugar Serve users. For more information on license types and the functionality available for each type, refer to the User Management documentation.

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

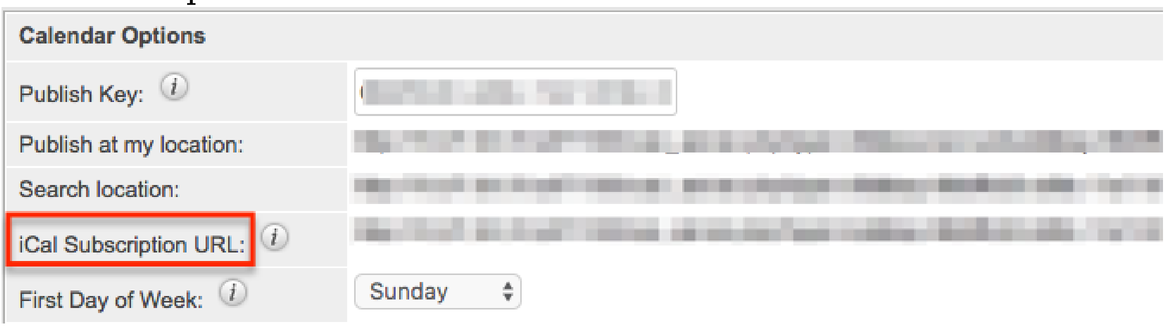
Sugar calendars can be shared and viewed with various iCal compatible calendar applications such as Apple Calendar, Google Calendar, Yahoo! Calendar, Mozilla Thunderbird, etc. The calendars are viewable as read-only in the external calendar applications and any edits to existing calendar events (e.g., meetings, calls) 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 users from viewing your calendar unless they have this information. The user must have your publish key information to view your Sugar calendar via the external calendar application.

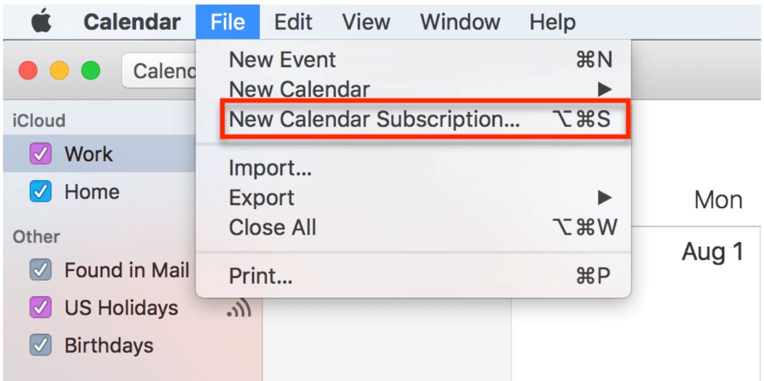
- **Publish Key**: The publish key is used to uniquely identify a user's calendar and sync Sugar's calendar to external calendar applications (e.g., Google Calendar, Apple Calendar). A system-generated alphanumeric value (e.g., 948fc65a-9c89-a11f-b40c-5) is displayed by default, but users can change this key (e.g., mysecretkey) to whatever they wish. The Publish at my location site, Search location, and iCal Subscription 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

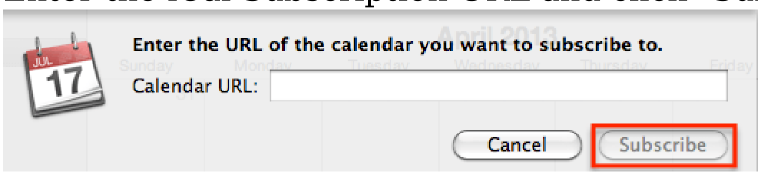
scheduling conflicts.

- **iCal Subscription 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, Work Week, and Month views when viewing your Sugar calendar. This setting also applies to calendar pickers which display when users are setting a value for a date field (e.g., Expected Close Date) in a record. You may need to refresh your browser to see changes take effect.

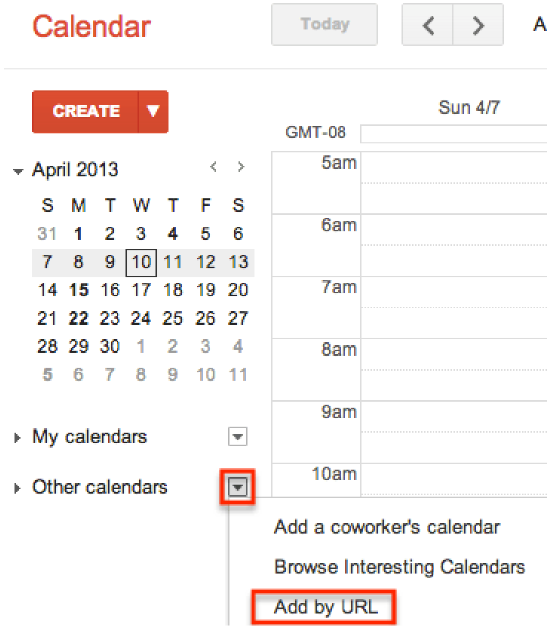
Use the following steps to integrate the external calendar application with your Sugar calendar:

1. Navigate to the Advanced tab in your user profile and scroll down to the Calendar Options section.


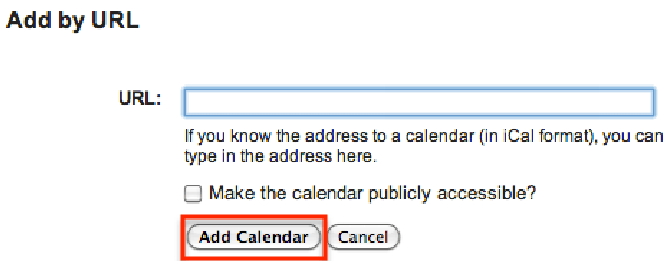
2. Copy the iCal Subscription URL then paste the value into your iCal compatible calendar application.
    - For Apple Calendar:
        - Click "File" then select "New Calendar Subscription".


        - Enter the iCal Subscription URL and click "Subscribe".


    - For Google Calendar (https://www.google.com/calendar):
        - Click "Other Calendars" then select "Add by URL".



- Enter the iCal Subscription 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 time currently scheduled in Sugar if the user's email address in Sugar matches the invitee email address in Outlook.

For help troubleshooting or displaying your Sugar calendar in an external application, refer to the Troubleshooting Viewing Sugar Calendar in Google Calendar and Troubleshooting Feed Refresh in External Calendars articles.

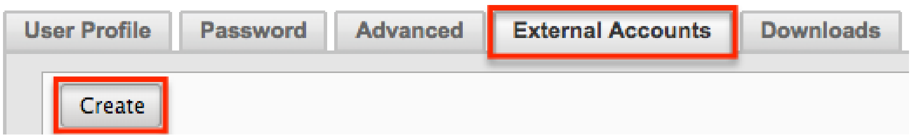
External Accounts Tab

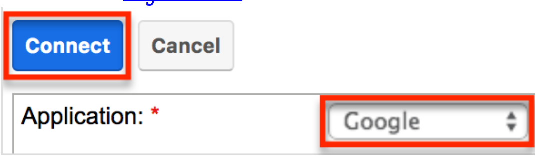
The External Accounts tab allows users to connect to external applications (e.g., Google, GoToMeeting, WebEx) from Sugar. Please note that you must have an existing account with the external application prior to connecting in Sugar.

Connecting to your Google account enables you to upload and access documents stored in Google Drive™ from the Documents module. In addition, you can upload and view Sugar documents via Google Drive. For more information on how to upload and view external source documents, please refer to the Documents documentation.

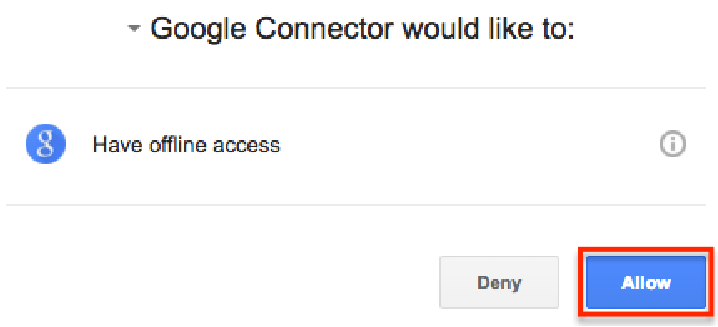
If you connect to your GoToMeeting and WebEx accounts, you will be able to schedule meetings in Sugar to be hosted by one of these applications. Please note that you must indicate the specific meeting type (e.g., Sugar, GoToMeeting, WebEx) when creating the meeting in Sugar. For more information on scheduling meetings, please refer to the Creating Records section of the User Interface 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) 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) 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.

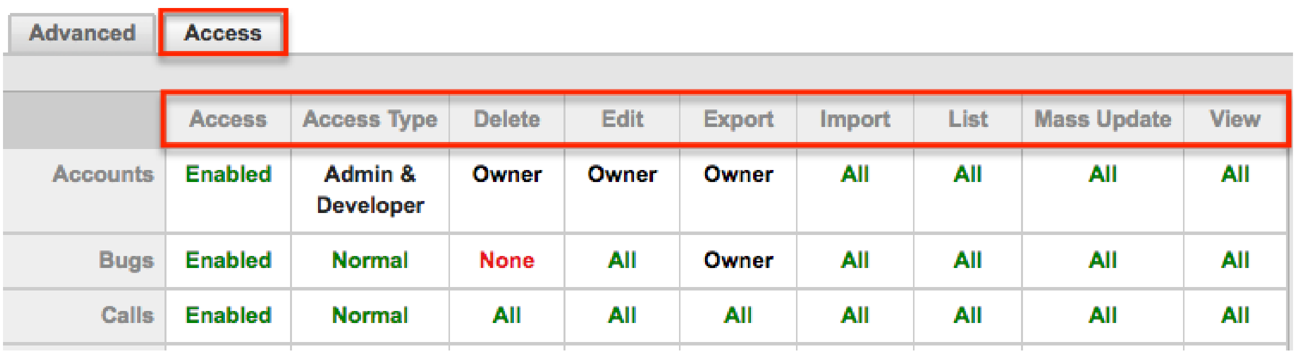
- **Disabled**: The user will not be able to access this module, view any of its records, or see any trace of its existence in Sugar.

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) 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.
- **Note**: The user is not able to perform this action while using this module.



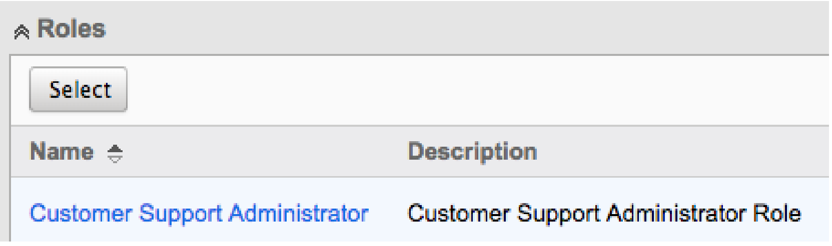
Advanced | Access

	Access	Access Type	Delete	Edit	Export	Import	List	Mass Update	View
Accounts	Enabled	Admin & Developer	Owner	Owner	Owner	All	All	All	All
Bugs	Enabled	Normal	None	All	Owner	All	All	All	All
Calls	Enabled	Normal	All	All	All	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 with teams to form a robust security model for non-admin users in Sugar. Roles control three different layers of access for users within Sugar: module, field, and action-level access. Please note that only users who are assigned to the specific role will be able to perform actions (e.g., view, edit, delete) defined by it. For more information on the various actions and setting options for roles, please refer to the Access Table section. Users who are not assigned 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 with roles 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 tab will 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 with 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.

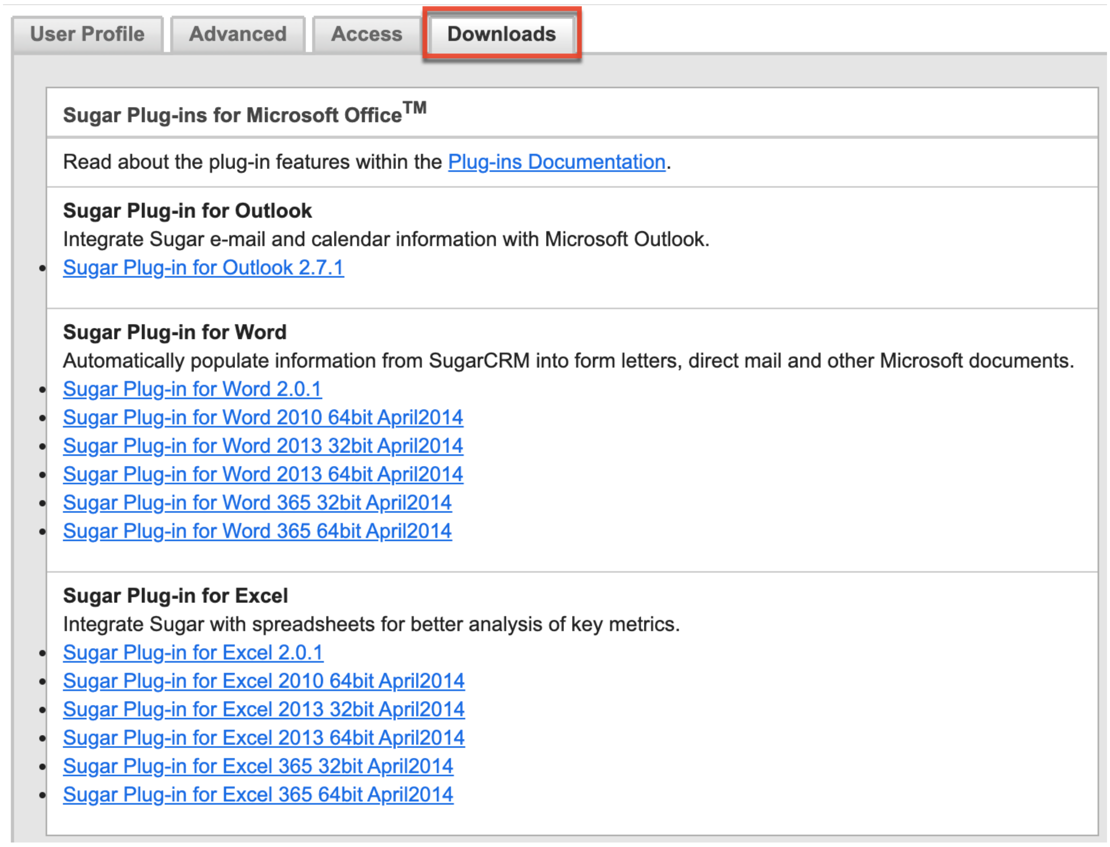
My Teams

Name	Description
Global	Globally Visible
Max Jensen	Private team for max
West	This is the team for the West

Downloads Tab

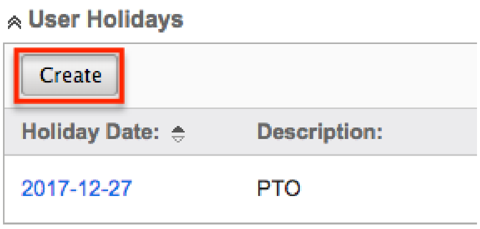
The Downloads tab contains the files to download for the following Sugar Plug-ins for Microsoft Office: Sugar Plug-in for Outlook, Sugar Plug-in for Word, and Sugar Plug-in for Excel. The Outlook plug-in allows you to archive emails to Sugar, synchronize contacts, meetings, and tasks, as well as create new Sugar records. The Word plug-in enables you to merge data, such as names and addresses in Sugar to perform mail merges. The Excel plug-in enables you to create, delete, update, or view data that is in your Sugar application. These plug-ins are available with all Sugar products and must be installed on each Windows computer running the Microsoft Office application where the plug-in is desired.

To download the plug-in(s), click the appropriate file that corresponds with your version and bitrate of Microsoft Office Outlook, Word, or Excel. 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 more information on downloading and installing the Sugar plug-ins, refer to the appropriate Plug-ins documentation.



User Holidays

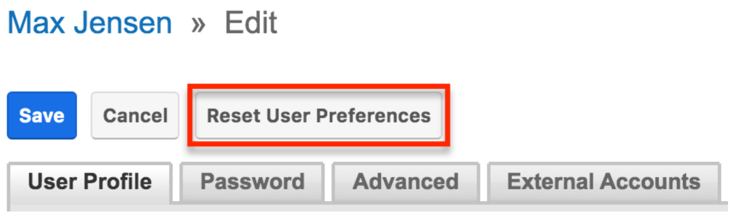
The User Holidays subpanel appears in the detail view (e.g., User Profile tab, Advanced tab) of the user's profile. Administrators can record the days that users will not be working so that the time off is considered when calculating project timelines in the Projects module. To add a holiday, click the 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.



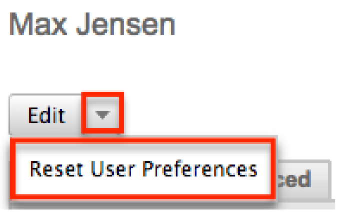
Resetting a User's Preferences

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). 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:



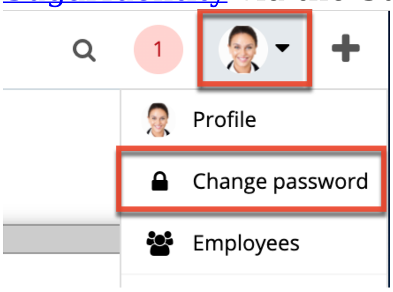
From detail view:



Changing Password

For Sugar instances that use [Sugaridentity](), users can change their password in Sugar by selecting the [Change Password]() option under the user menu on the upper right of Sugar. The Change Password screen will open and display the Old, New, and Confirm password fields as well as the organization's password requirements (if any). Please note that passwords can be changed as often as you wish in Sugar, and it is also recommended that you update your Sugar passwords on a regular basis for the security of your account.

Note: Administrator users also have the option to change their Sugar password in [SugarIdentity]() via the SugarCloud Settings console.



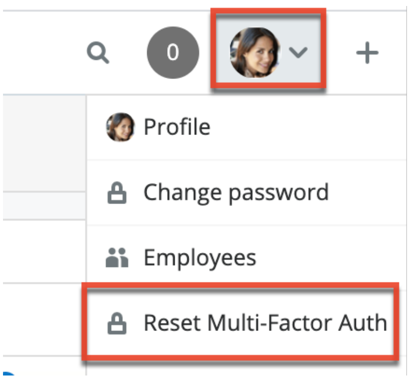
To change your password, simply enter your current password, new password, and confirmed password making sure to meet all the password requirements listed on the screen. System administrators can configure the password requirements in SugarIdentity via the SugarCloud Settings console, which determines what users will need to include when creating new passwords. Administrators can set 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 a part of the password requirements. If you do not remember your current Sugar password, click the "Forgot Password?" link to request a password reset.

Once you have entered the new password, click "Confirm" to preserve the change. A success message will appear once the password has been updated successfully; click "Continue" to be directed back to Sugar's home page. You will also receive an email notification confirming that your Sugar password has been changed.

Resetting Multi-Factor Authentication

For SugarIdentity-enabled instances that use multi-factor authentication, users will need to use a mobile authenticator app (e.g., Authy, Google Authenticator, Microsoft Authenticator) to log in to their account. When the administrator enables multi-factor authentication for your Sugar instance, the Reset Multi-Factor Auth option will appear under your user menu on the upper right of Sugar. Do not click this option if you have not already authenticated using a mobile authenticator app. Only perform this action if you need to reset the multi-factor authentication for your account, for example, when you need to set up the authenticator app on a new mobile device. Please note that administrators also have the ability to reset multi-factor authentication for your account in case you lose your mobile device, for example, and need to re-authenticate using an authenticator app on a new device to log in to Sugar.

Use the following steps to reset multi-factor authentication for your account:

1. Click your user profile on the upper right of Sugar and select "Reset Multi-Factor Auth".


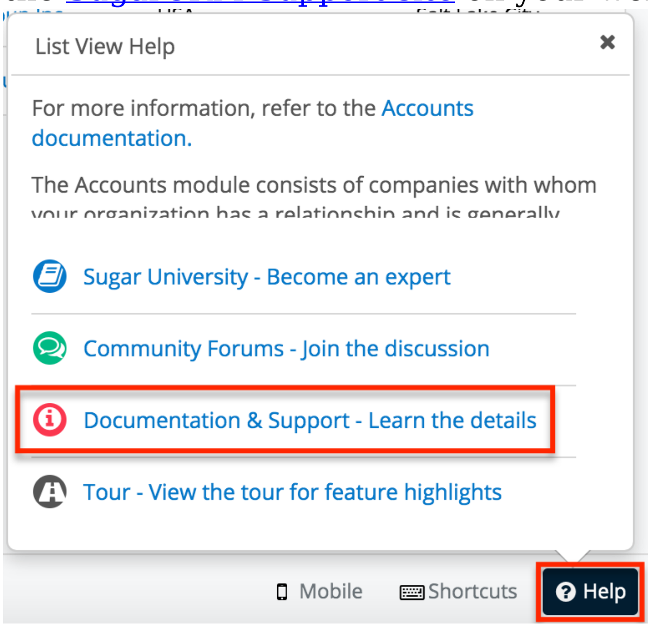
2. A pop-up message will appear asking for confirmation. Performing this action will immediately log you out and you will need to re-authenticate

using an authenticator app on your next log in. Click "Confirm & Log Out" if you wish to proceed.

The next time you log in to Sugar, you will be required to scan the QR code to pair the authenticator app with your Sugar account. For steps on logging in to Sugar using an authenticator app, refer to the Logging In With SugarIdentity Using Multi-Factor Authentication section of this page.

Accessing Support

The SugarCRM Support page provides access to various Sugar Support resources such as the case portal, documentation, knowledge base, etc. Users can easily access the support page by clicking the Documentation & Support link in Sugar's help pane. To access Sugar's Support page outside of your instance, go directly to the SugarCRM Support site on your web browser.



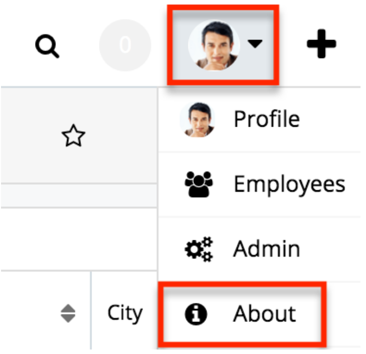
The Get Started section of the Support page provides users, administrators, and developers with the appropriate resources to get them started in configuring, customizing, and utilizing the application. The Documentation and Knowledge Base sections provide access to Sugar's self-help area where you can learn how to use various parts of the application via online documentation and knowledge base articles. 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 provides key information such as supported versions and platforms to ensure you are running Sugar in the best performing environment, customer resources to help you manage your Sugar subscription, view/download purchased orders, and access the bug and case portal. In addition, it provides guidelines for deploying Sugar on-site and requirements for setting up development environments.

The Training section directs you to the Sugar University page where you can find a variety of training options to help end users, administrators, and developers. You can find self-paced videos or e-courses, live training and webinars, personalized training, and pursue Sugar certification. The Community section navigates you to the SugarCRM community page where you can collaborate with other users, Sugar partners, and Sugar employees to answer questions, participate in discussions, solve problems, etc.

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 product and version of your instance.



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User Interface

Overview

The user interface includes all of the visible elements users see and interact with while using Sugar including the headers, fields, subpanels, dashboards, etc. Knowing how to properly navigate around the application along with what the various layouts, options, and action items do in Sugar will be critical in managing your data in the system. This documentation covers the basics of Sugar's user interface as well as how to perform common tasks or operations in the application.

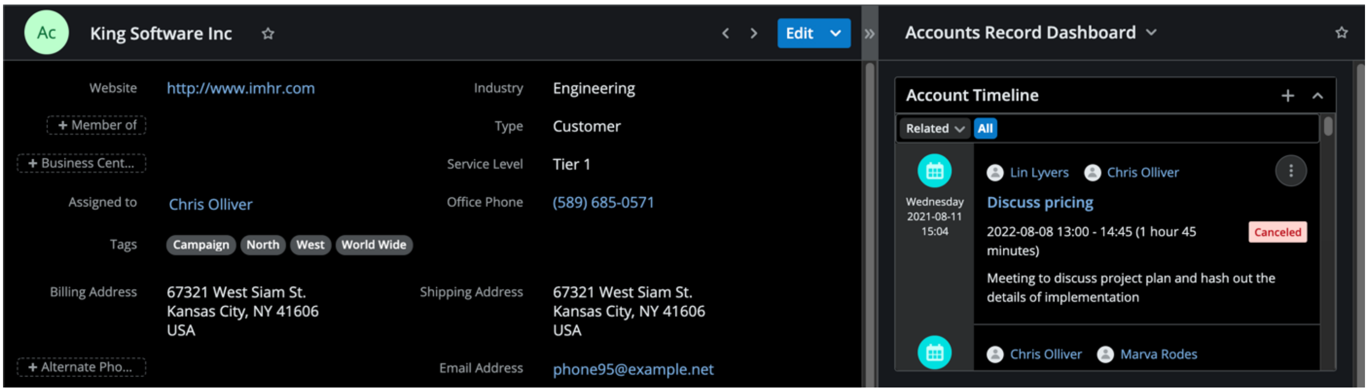
Sidecar Modules

This page covers the user interface that was introduced in Sugar 7 called "Sidecar", which applies to all modules except for Campaigns. For information on the Campaigns module user interface (legacy), please refer to the Legacy User Interface knowledge base article. Custom modules created in Module Builder will utilize the Sidecar user interface. Custom modules installed to an instance prior to Sugar 7 that were not created in Module Builder will continue to use the Legacy user interface upon upgrade to 7.x and above.

Theme

Sugar offers two different theme options for viewing the application: light mode and dark mode. The selected theme is controlled by the Appearance setting in each user's profile. For more information on changing your user profile settings, please refer to the Getting Started documentation.

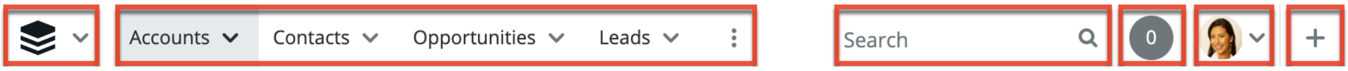
System Administrators can upload different logos for light vs dark mode. For more information, please refer to the System documentation in the Administration Guide.



Navigation Bar

All pages within Sugar display a navigation bar spanning across the top of the screen. The navigation bar allows you to access the various modules (e.g., Accounts, Contacts, etc.), access your Home page, perform a global search, etc. You can configure the navigation bar via your user preferences to select which modules you want to display as well as their order. For more information, please refer to the Layout Options section of the Getting Started documentation.

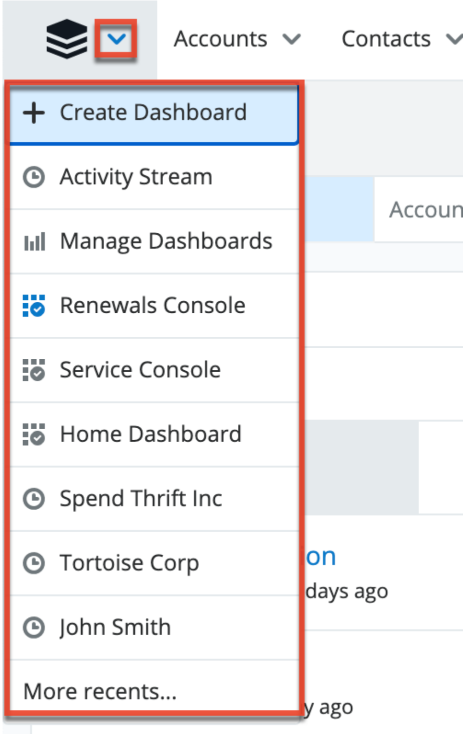
The default navigation bar consists of the following options from left to right:



Navigation Bar Item	Description
Home	Click the Sugar Cube icon on the upper left to access your Home page dashboards as well as your Activity Stream.
Module Tabs	Both stock and custom modules can be displayed in the navigation bar. Click the module name to open its list view or click the triangle to the right of each module name to display the Actions, Recently Viewed, and Favorites menus.
Global Search	Enter keywords into the global search bar to search for records across all Sugar modules.
Notifications	View system notifications (if any) by clicking the notification box. The number shown indicates the count of unread notifications.
User Menu	Click the user profile image to open the user menu which allows access to your profile, the Employees module, etc. **Note**: For instances that use SugarIdentity, certain fields (e.g., First Name, Last Name, Work Phone, Title) in the user's profile are read-only and can only be edited by administrators in SugarIdentity via the SugarCloud Settings console.
Quick Create	Click the Add button (plus icon) to open the Quick Create menu which allows you to create records from anywhere in Sugar.

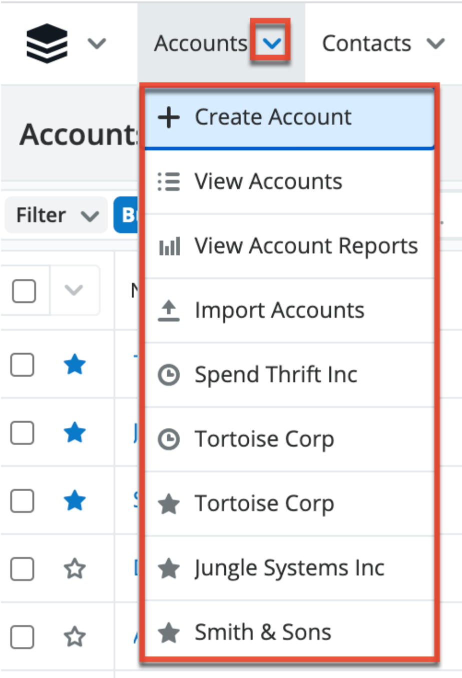
Home

You can access your Home page from anywhere in Sugar by clicking the Sugar Cube icon at the top left of every page. Sugar's home page houses full-page dashboards and your instance-wide activity stream (if enabled). Additionally, you can manage your dashboards and visit recent records from the Home page actions menu. For more information, please refer to the Home documentation.

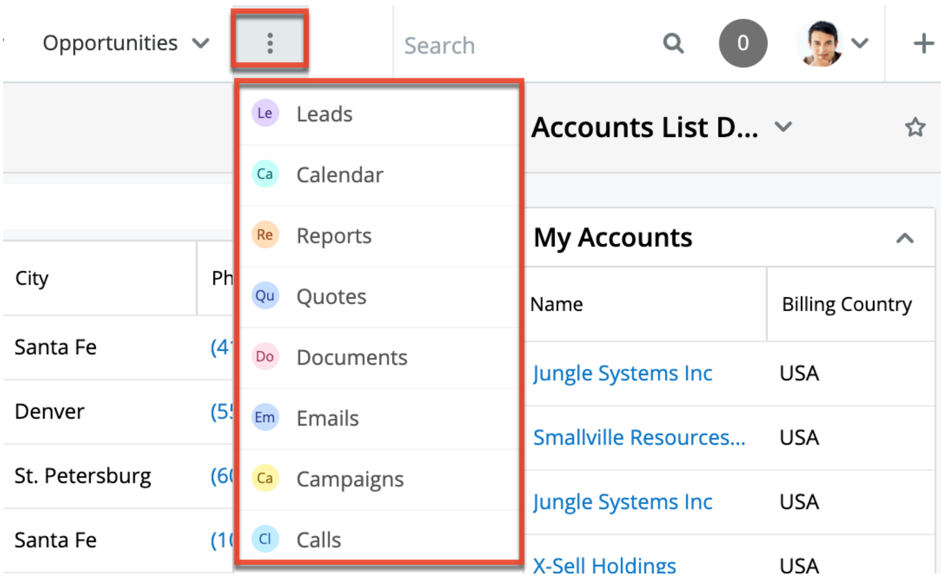


Module Tabs

Module tabs are located to the right of the Sugar Cube icon on the navigation bar at the top of any Sugar screen. To access a specific module's list view, simply click the module's name. You may also click the triangle to the right of the name 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 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 number of displayed module tabs depends on your screen resolution as well as the size of your browser window. When your available modules do not fit within the navigation bar's width, clicking the three-dots menu to the right of the displayed modules allows you to select and navigate to the list view of the additional modules.



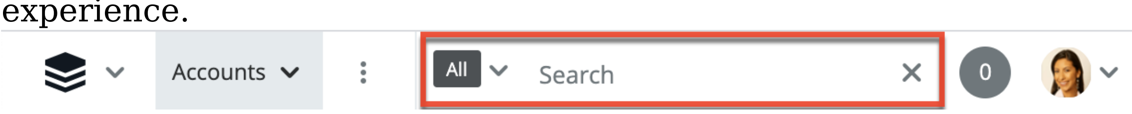
If you do not see a particular module tab in Sugar, please check the following:

- The module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user menu (upper right of Sugar), click "Profile", 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 click "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 module 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.

Global Search

Global search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. The Global Search bar displays on the upper right of any Sugar page and utilizes full-text search to search throughout most fields and modules for an enhanced search experience.



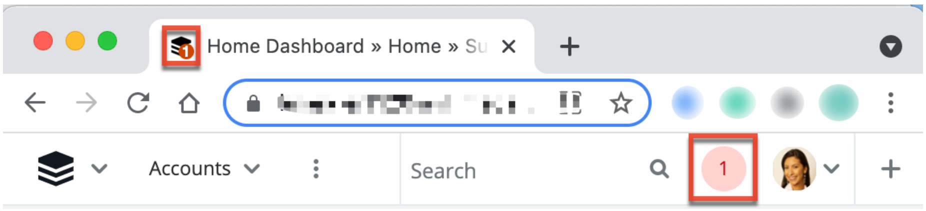
Clicking on the search bar will expand it across Sugar's navigation bar. To perform a search, type the search phrase into the search box, and the pop-up results will begin appearing once you enter at least one character. Click "View all results" at the bottom of the pop-up results to see and filter additional matches. To minimize the search bar, simply click anywhere outside of the search bar. For more information on using Global Search, please refer to the Global Search section of the Search documentation.

Once expanded, you will be able to access the Modules dropdown by clicking the down arrow on the far left of the search box. This allows you to restrict results to particular modules (e.g., Accounts, Contacts, etc.). For more information on configuring your global search, please refer to the Search documentation. Administrators can also enable or disable modules as well as control additional elements of global search via Admin > Search and Admin > Studio. For more information on these configurations, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation.

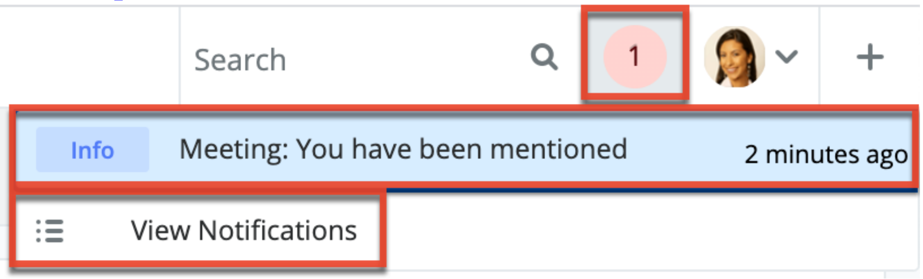
Notifications

Sugar notifications relay key messages, warnings, and alerts that are relevant to the current user. The Notifications indicator is located in the top right corner of the screen next to the global search bar; the number displayed represents how many messages have a status of Unread. If you are logged in to Sugar using the

Chrome or Firefox browser, the SugarCRM cube icon in your browser tab also displays the count of unread notifications. When the notification count changes, the icon's count will be updated within 5 minutes of the change or upon reloading the tab.



Clicking the number in Sugar opens a dropdown menu displaying your most recent unread notifications. Click any notification to open it in record view, or click "View Notifications" to open the Notifications list view. A notification is automatically marked as read when it is opened in record view or previewed from list view. If you wish to toggle its status between Read and Unread, simply click the status field in list view, record view, or preview. To change the status of multiple notifications at a time (e.g., to mark several notifications as read), you can also mass update the records from list view.



If a notification requires action within Sugar, a link may be included in the Description field, shown in record view or when previewing the notification. Clicking the link takes you to the related record or the area where action is needed.

Notification Severity Levels

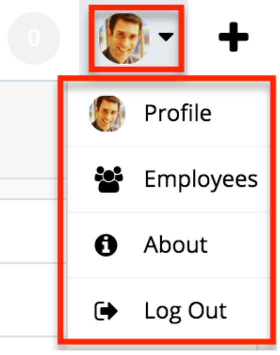
Each notification can have one of four severity levels:

- **Alert (Red)**: Indicates something is critically wrong with your Sugar instance and needs the attention of a system administrator immediately.
- **Warning (Yellow)**: Indicates something in your Sugar instance needs your attention or the attention of a system administrator to be fixed.
- **Information (Blue)**: Standard notification including reminders for upcoming meetings, calls, or tasks. Note that for a notification to appear, a newly created activity must be scheduled to begin at least one hour later than the time it was created.

- **Success (Green)**: Indicates the successful completion of an action or configuration change.

User Menu

Your profile icon appears in the upper right of Sugar; clicking it displays the user menu where you can access your profile, the Employees page, and view important version information about your instance. To upload a photo for your profile image, please refer to the Getting Started documentation.



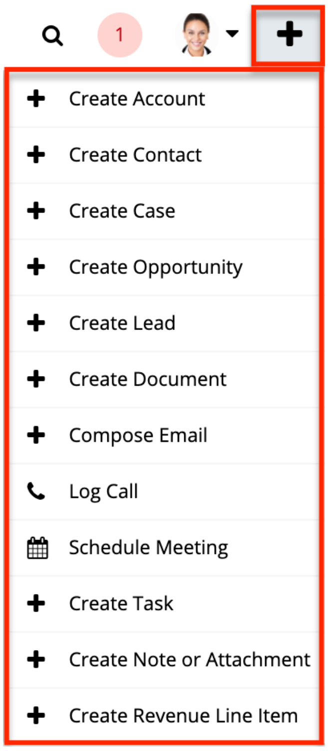
The user menu allows you to perform the following operations:

Menu Item	Description
Profile	View your user profile, change your password, and personalize various aspects of Sugar. **Note**: For instances that use SugarIdentity, certain fields (e.g., First Name, Last Name, Work Phone) in the user's profile are read-only and can only be edited by administrators in SugarIdentity via the SugarCloud Settings console. In addition, users will not be able to change or reset their password and will need to click the "Forgot Password?" link on the Sugar login screen to reset their password.
Employees	Navigate to the Employees module to search and view employee records. Users with administrative privileges can also create and edit employees in the system. For instances that use SugarIdentity, certain fields (e.g., First

	Name, Last Name, Office Phone) in the employee's record are read-only and can only be edited by administrators in SugarIdentity via the SugarCloud Settings console. **Note**: Every user is listed as an employee; however, every employee may not be a user in Sugar.
Admin	Navigate to the Admin page to configure and customize various aspects of your Sugar instance. **Note**: This option is only available if you are an administrator user or have or Developer-type role access.
About	Navigate to the About page to view your instance's current Sugar product, version, and build, as well as resources and source code references.
Log Out	Log out of your current user session. You will be directed back to the Sugar login page for your instance.

Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the Add button on the upper right of any Sugar page to access the menu. Please note that a maximum of ten modules may be enabled to display in the Quick Create menu. Administrators can configure which modules are enabled and the order in which they appear via Admin > Configure Navigation Bar Quick Create. For more information, refer to the Developer Tools documentation.



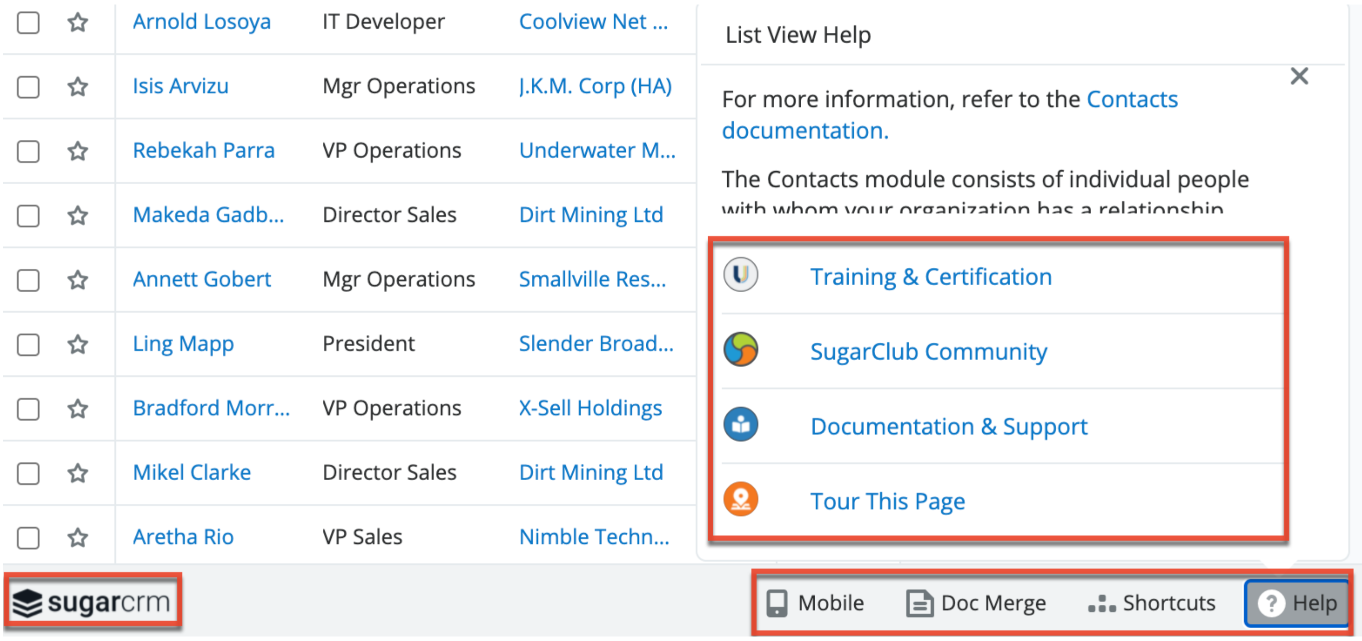
Clicking on an item in the Quick Create menu will open the record view form for the specific module. When using quick create while viewing an existing record where a relationship exists between the two modules, Sugar automatically relates the new record to the one being viewed. For example, if you are viewing an account, ABC Company, and create a new contact via quick create, the Account Name field in the new contact will automatically populate with "ABC Company", thus creating the link between the two records.

All required fields will indicate "Required" in the field and must be completed prior to saving. Once the necessary information is entered, click "Save". If you do not wish to create the record, simply click the Cancel button. Please note that administrators have the ability to configure the record view layout via Admin > Studio. For more information on configuring record view layouts, please refer to the Studio documentation.

Note: Because the Quick Create drawer overlays the page from where it is launched, using the browser's back button will appear to send you back two pages instead of to the previous view. To return to the previous view, use the Cancel button instead.

Footer

Sugar's footer displays the SugarCRM logo, Mobile link, Shortcuts link, Help link, as well as links to enabled third-party integrations.



The following links are available in Sugar's footer:

- **Logo**: Click the logo on the bottom left of Sugar to return to your home page. Administrators can replace the SugarCRM logo with a custom logo via Admin > System Settings. For more information, please refer to the System Settings documentation.
- **Widgets**: Links for any installed third-party integrations will appear to the right of the SugarCRM logo.
- **Mobile**: When viewing Sugar via a touch-screen device, the Mobile link will appear allowing you to view Sugar's mobile site.
- **Doc Merge**: Access the Doc Merge widget, which includes a list of the current user's merged documents and the Template Assistant. Please refer to the Doc Merge documentation for more information.
- **Shortcuts**: Access the Keyboard Shortcuts help page to view the various shortcut keys available to use along with a description of the actions they perform. For more information regarding the Keyboard Shortcuts help page, please refer to the Accessibility documentation.
- **Help**: Click the Help link in the footer for a brief introduction to the current module and a link to its corresponding documentation. The following learning resources are also available in the help pane:
- **Training & Certification**: Navigate to the SugarU space in SugarClub, where you can enroll in online classes, engage with live training, and get Sugar-certified.
- **SugarClub Community**: Engage, learn, and explore with others around the world in the SugarClub online community. Level up your Sugar knowledge and share your expertise with other users, Sugar partners, and Sugar employees.
- **Documentation & Support**: Navigate to the Sugar Support Site, where

you can access the case portal and official product documentation.
- **Tour This Page**: Take a quick, in-app tour of key features on the current page. For more information, refer to the Tour section of the Getting Started documentation.

Field Types

Sugar records include a variety of field types that enable you to capture all of the different kinds of data that are important to your organization. While many fields are available for use on each module out-of-the-box, administrators and users with developer-level role access have the ability to add fields of these various types to modules via Admin > Studio as described in the Studio documentation. Studio may also be used to configure fields by, for example, making fields required, allowing them to be mass updated, making their values calculated, and specifying when they should be visible.

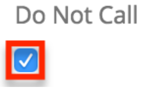
Descriptions and instructions for editing different field types are available in the following sections:

Action Button Fields

Action Button fields are buttons configured by your admin to provide shortcuts to common actions from record views. For more information on configuring Action Buttons, please refer to the Action Buttons documentation.

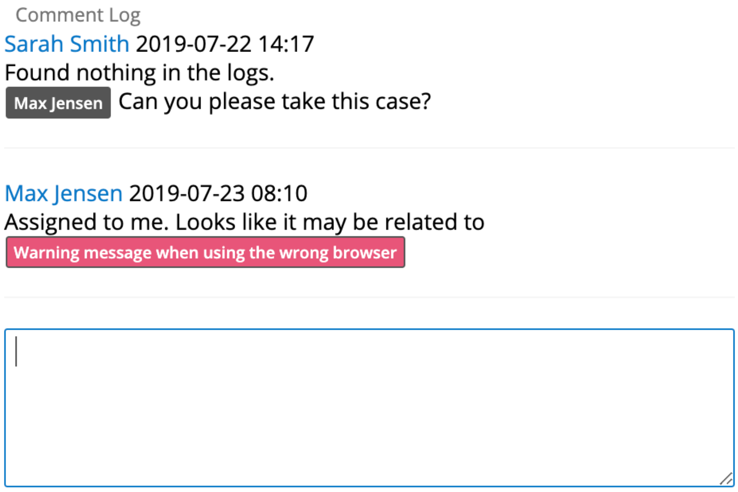
Checkbox Fields

Checkbox fields provide a boolean type typically used to answer a yes or no question. Click the box to toggle whether it is checked or not.



Comment Log Fields

The Comment Log field allows users to add messages, comments, or other text to a log appearing on the record view. To add an entry, click anywhere inside the field and type a message into the text area that appears. After saving the record, the message is appended to the end of the log with a link to the user that added the entry and the date and time the entry was created. Once saved, entries cannot be edited or removed.

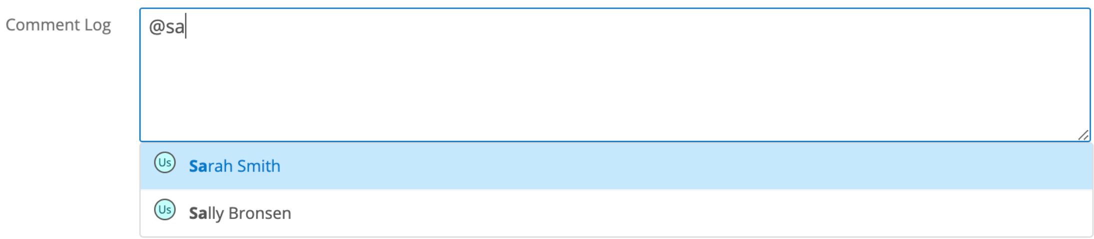


If the length of a comment log entry is longer than the maximum set by the admin in the system settings, the text will be cut off with a "Show more..." link that displays the remainder of the entry when clicked. Once the entry is expanded, a "Show less..." link is displayed that collapses the text so that only the configured number of characters are displayed again. See the System documentation in the Administration Guide for more information.

Note that Comment Log fields cannot be created in Studio; they exist automatically on many modules and can be added to the layout in Studio. This can be done by a system administrator or someone with Developer-level role access. On the Bugs and Cases modules, the Comment Log field is displayed by default. For more information on using Studio to add fields to a module's layout, refer to the Studio documentation.

Tagging Users in Comment Log Entries

When you mention users in comment log entries, you can insert a link to their employee record in the form of a clickable pill; the tagged user receives a notification in Sugar and an email notification, if this preference is enabled in the user's settings. To tag a user, type the @ symbol followed by at least the first two characters of the first or last name. A list of matching users will appear below the text area; select the user you want to mention and the tag will be added to the entry. After saving, the tag is displayed as a clickable pill.

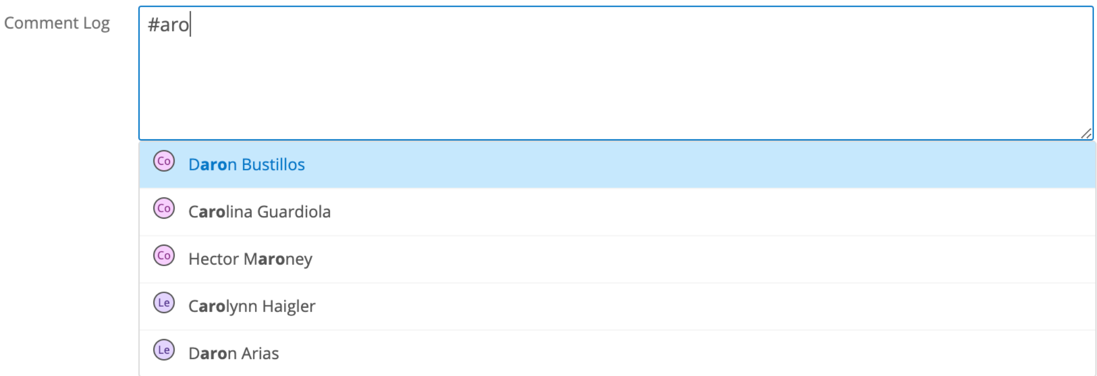


To filter by letters in the middle or end of the first or last name instead of the beginning, use the wildcard character (%) at the beginning of your criteria. For example, "@%en" would yield Sally Bronsen, Max Jensen, and Jim Brennan.

If the user you want to mention does not have access to the record, their name will be disabled in the list of results, labeled with "No access", and you will not be able to tag the user.

Linking to Records in Comment Log Fields

It is possible to link to Sugar records in comment log entries; the link will appear as a clickable pill. To link to a record, type the # symbol followed by at least two characters in the name of the record. A list of matching records will appear below the text area; select the record you wish to link to and the link will be added to the entry. Upon saving, the link will be displayed as a clickable pill.

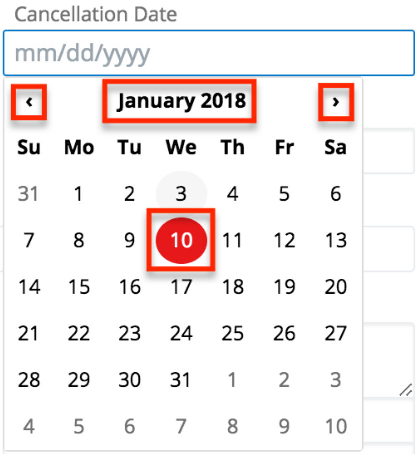


If you are viewing a comment log entry containing a link to a record to which you do not have access, the link will still be clickable but the text will say "No data available".

Date Fields

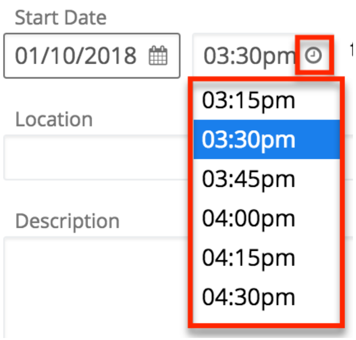
Date fields allow users to specify a particular date by either typing a date in the provided format or clicking the Calendar icon and selecting it via the date picker.

Click the month and year (e.g., "January 2018") to select the desired month or use the arrows to navigate to the desired month. To set the year, click the month and year at the top of the picker, then click the year at the top of the picker, and then select the desired year. Once the month and year are set, click the desired date below to set the date and close the picker.



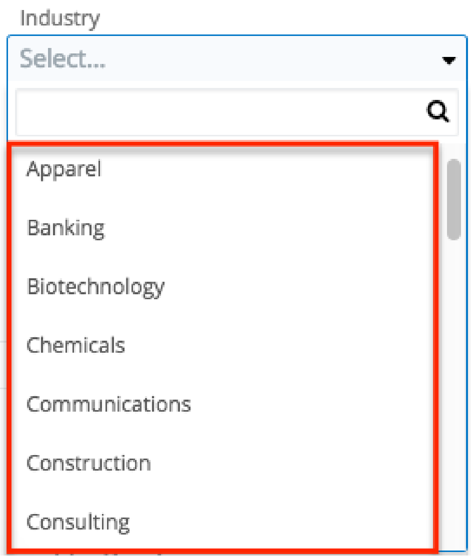
Datetime Fields

Datetime fields allow users to specify both a particular date and a time. The date portion is set just like a date field as described above. The time portion can be set by typing a time in the provided format or clicking the Clock icon and selecting it via the dropdown.



Dropdown Fields

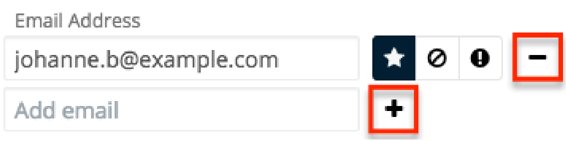
Dropdown fields provide a list of values where only one value can be selected at a time. The list will be collapsed to only display the selected value except during editing, making it appropriate for longer lists of values. Click the selected value to see the full list. Clicking the desired value will replace it as the selected value.



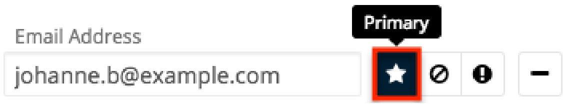
Email Address Fields

Email address fields contain one or more email addresses for a single record; email addresses are entered by clicking in the field and typing or pasting the address. The following options are available when editing an Email Address field:

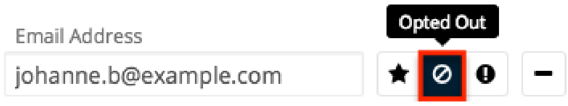
- **Add/Remove**: Add additional email address fields by clicking the Add button. Click the minus button to remove the adjacent address.



- **Primary**: A white star with a black background represents the primary email address on a record. This will be the default address that Sugar will find when the record is included in email campaigns and other send-message events performed within the application. On a given record, only one email address can be the primary one. If a record contains only one email address, it will be set to primary by default.



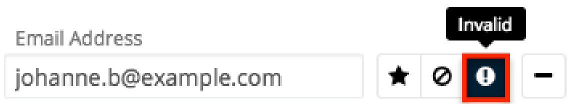
- **Opted Out**: The button with a slashed circle indicates whether or not an email address has been opted out from email marketing campaigns. Sugar automatically opts-out an email address when a recipient clicks the opt-out link in an email-type campaign message. When enabled, the button will have a black background. Administrators can configure whether new email addresses added to Sugar records default to opted-in or opted-out by using the "Opt-out new email addresses by default" option via Admin > System Email Settings.



When an opted-out email address is saved, the opt-out status is indicated by a blue circle with a line through it. Opted-out email addresses also display a Link button in record view. Clicking this button will copy a link to your computer's clipboard which you can send to the email address owner in order to request that they confirm their desire to receive marketing emails from your organization. When the copied link is visited in a web browser, Sugar will automatically set the email address to opted-in.

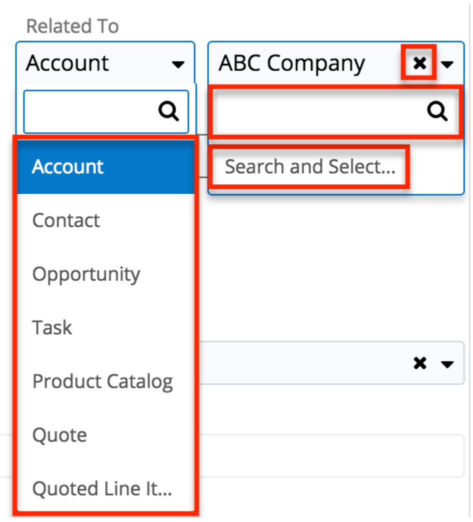
Please note that opted-out email addresses are only excluded from campaigns, so users can continue to send them transactional emails via the Emails module. For more information about email opted-out email addresses, refer to the Emails documentation.

- **Invalid**: Invalid or undeliverable email addresses are represented by a black button with a white exclamation point. Sugar automatically marks email addresses as invalid if they are returned via the recipient's mail server during the distribution of an email campaign. Users can also manually toggle the invalid designation on and off by clicking the Invalid button next to the email address. Sugar will not permit users to send messages to invalid email addresses from anywhere within the application.

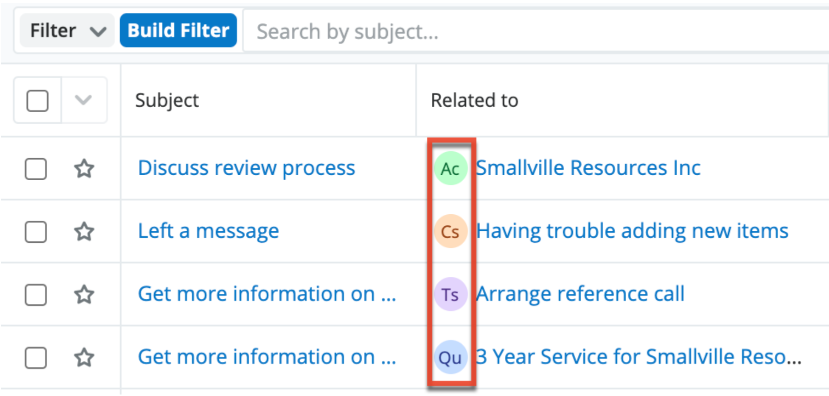


Flex Relate Fields

Flex relate fields require users to select first the module and then a record from that module to relate to the current record. The module selector works like a dropdown field (described above) while the record selector works like a relate field (described below). You can click the "x" to the right of the selected record's name (e.g., ABC Company) to clear out the value. Please note that a module may only have one flex relate field.

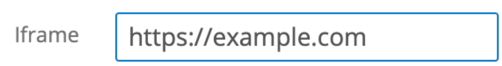


In most views, once saved, the field label changes to the selected module and the field value displays the selected record. In list view, however, the column maintains its field label and you can instead identify the record's module using the color-coded module icon next to the record name. Hovering over the icon reveals the module name.



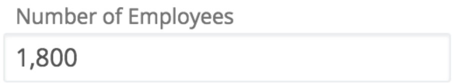
Iframe Fields

Iframe fields allow users to load content from an external website by entering a URL (https://example.com) in the field. Please note that Sugar will only load content from trusted domains that the system administrator has approved in Admin > Content Security Policy Settings. If you get an error indicating that the content has not been approved, please reach out to your administrator as they will need to update your system's [Content Security Policy](#) settings. If the CSP settings get updated while you are logged in to Sugar, you will need to refresh your browser for the changes to take effect in your session.



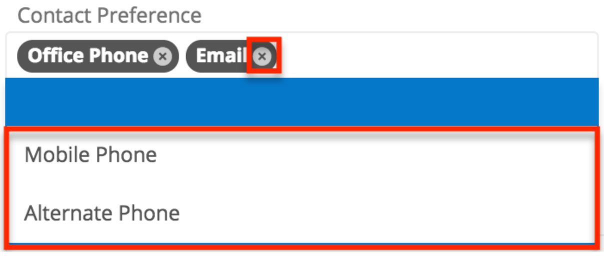
Integer Fields

Integer fields allow users to enter whole number values (e.g., 850) by clicking on the field and typing. Administrators can specify a minimum and maximum value for the field via Admin > Studio.



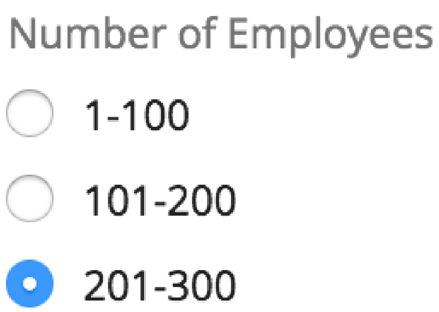
Multiselect Fields

Multiselect fields provide a list of values where one or more values can be selected at a time. The list will be collapsed to only display selected values except during editing, making it appropriate for longer lists of values. Click the blank space to the right of selected values to see additional options. Click the x on a selected value to deselect it.



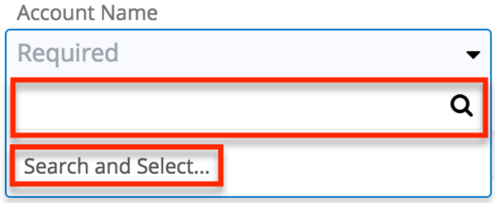
Radio Fields

Radio fields provide a list of values where only one value can be selected at a time. The entire list of all values will be displayed at all times, making it appropriate for shorter lists of values. Click the circle of the desired value, and any previously selected value will be deselected automatically.



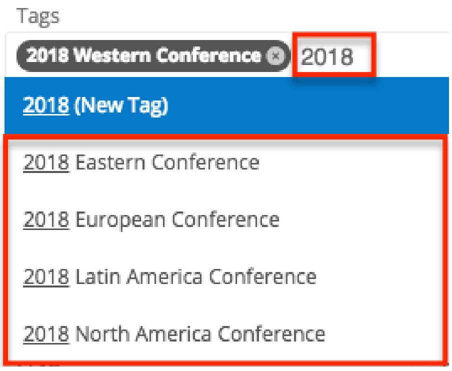
Relate Fields

Relate fields allow users to select a record from a single module. Both relate fields (which are visible via Admin > Studio > {Module Name} > Fields) and one-sided relationships (i.e., one-to-many and one-to-one) are represented by the same relate field user interface. Type the first few characters of the desired record and either select from the type-ahead results or click "Search and Select..." at the bottom for a more robust search.



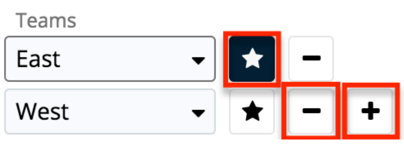
Tags Fields

The Tags field allows users to enter keywords or phrases in order to connect Sugar records by common attributes that may not be defined via basic database fields. Once a new tag has been created, it can be re-used by any user in any module that contains a Tags field. To use the Tags field, click inside the field and type a word or phrase. Sugar will recommend existing tags as you type, but you can choose to ignore the recommendations and create an entirely new tag. For more information about tagging records in Sugar, please refer to the Tags documentation.



Teams Fields

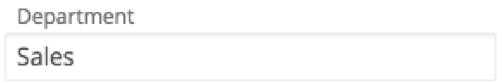
The Teams field specifies which teams of users have access to view the record. An individual team selection works like a dropdown field which is described above. Click the Add button to add additional teams to the record or the minus button to remove a team. Click the star button to set the primary team. For more information on teams, please refer to the Team Management documentation.



Note: If your administrator has enabled team-based permissions, you may also see a Lock button or a "Selected" box on the Teams field. Please refer to the Using Team-Based Permissions section of this page for more information.

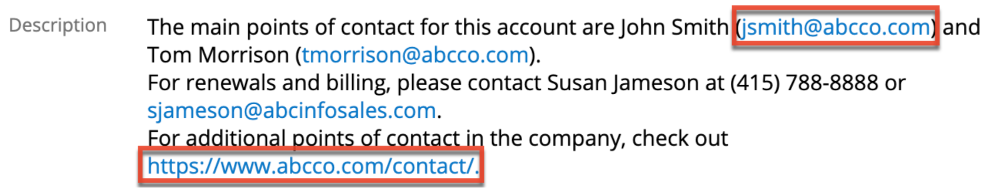
Text Fields

Text fields allow users to enter a word or brief phrase by clicking into the field and typing. Text fields will accept any combination of characters (i.e., letters, numbers, spaces, and symbols) but have a 100-character limit by default. Administrators can edit the maximum character length restriction via Admin > Studio.

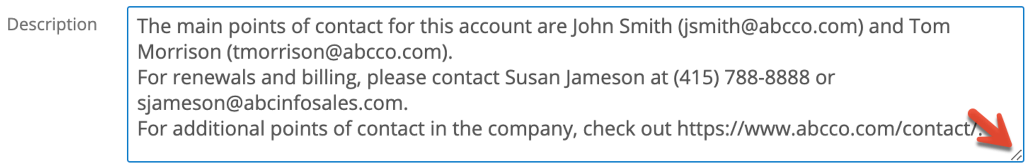


Text Area Fields

Text area fields allow users to enter large amounts of text by clicking on the field and typing. Please note that any hyperlinks (e.g., website, email) entered in the text area field will appear clickable once the record is saved. Clicking the hyperlink(s) within the field will open the link in a new tab for you to access the external company website, compose email, etc.



Administrators can also modify the default display size of a text area field via Admin > Studio, but this will not limit the number of characters that can be entered by a user. Most browsers supported by Sugar will allow the user to resize an active text area field temporarily by dragging the bottom corner of the field to the desired width and height.



Creating Records

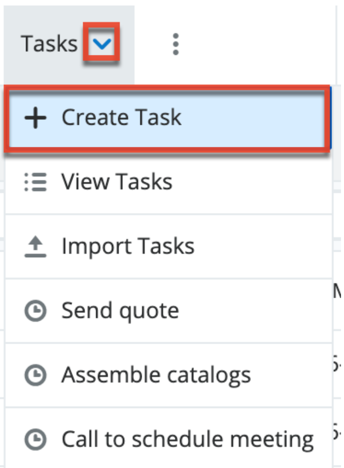
There are various methods for creating records in Sugar including basic creation, quick create, duplication, and import. The same record view layout opens when creating records by any of these methods and includes all of the relevant fields. Please note that administrators can configure the record view layouts to tailor them to your organization's needs via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation.

Basic Record Creation

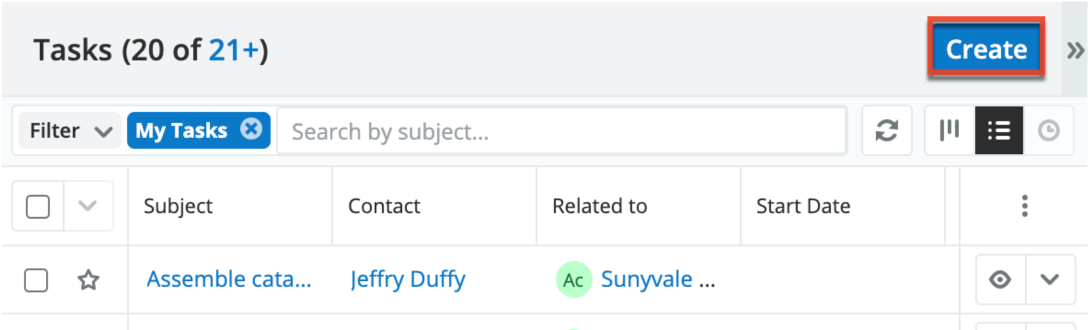
The most common method of record creation is via the individual module itself using the Create button in the list view or the Create {Module} option in the module tab. For the Cases, Tasks, Leads, and Opportunities modules, you can also create records using the Create button in the tile view. This opens the record view layout in edit mode which allows you to enter all of the desired information.

The following steps cover creating a task via the Tasks module as an example:

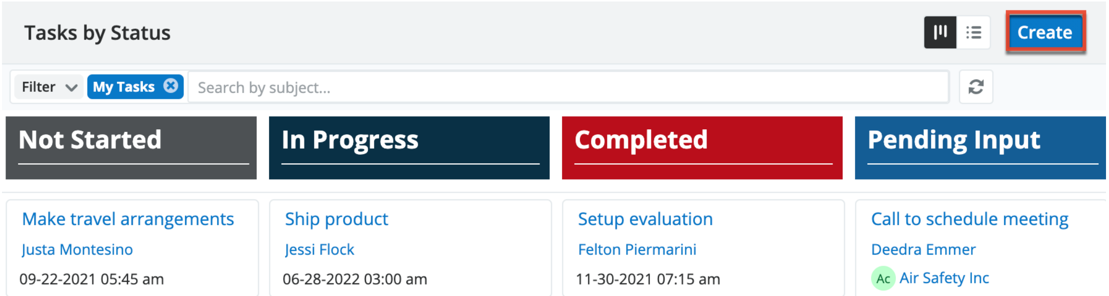
1. Click the triangle in the Tasks module tab to open the Actions menu and select "Create Task". You can also click the Create button on the upper right of the Tasks list view or tile view.
    - From Tasks module tab:

    - From Tasks list view:



- From Tasks tile view:



2. Enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

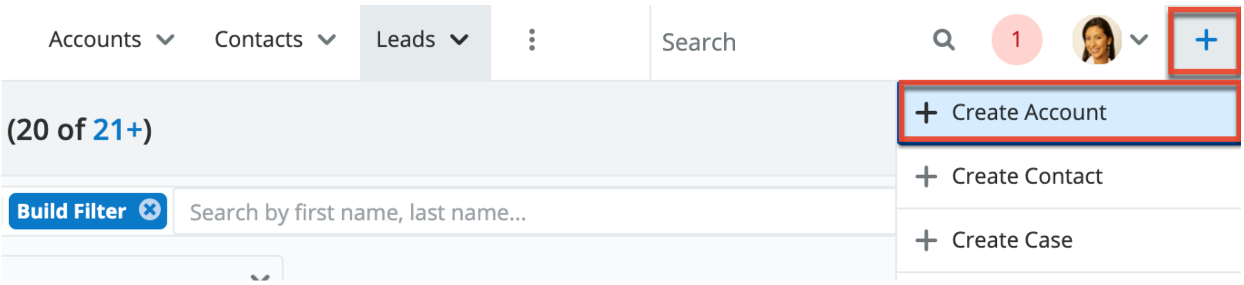
Creating via Quick Create

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 any Sugar page to access the menu.

Note: Administrators have the ability to enable or disable a module in the Quick Create menu. Also, some modules are not available to be enabled. For more information, please refer to the Developer Tools documentation.

The following steps cover creating an account via Quick Create as an example:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Account".



2. Enter appropriate values in the fields in the record view form. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

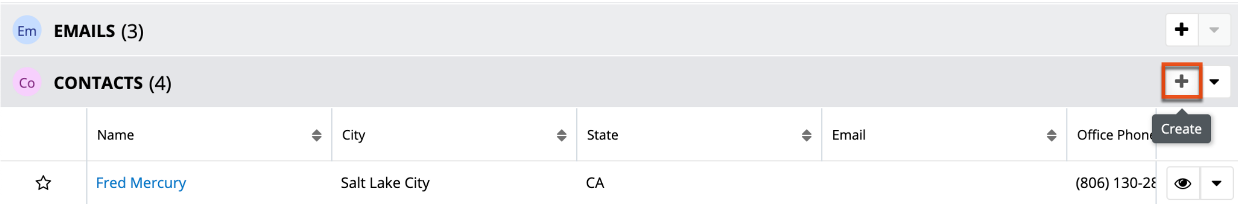
Creating via Subpanels

On record views, beneath a record's fields, subpanels appear which contain related records from various modules. You can create a related record as well as link an existing record directly from the subpanel.

Note: Administrators have the ability to disable a module's subpanels for the entire instance via Admin > Display Modules and Subpanels. For more information, please refer to the Developer Tools documentation.

The following steps cover creating a contact via a Contacts subpanel as an example:

1. Click the Add button on any Contacts subpanel on a related module's record view.



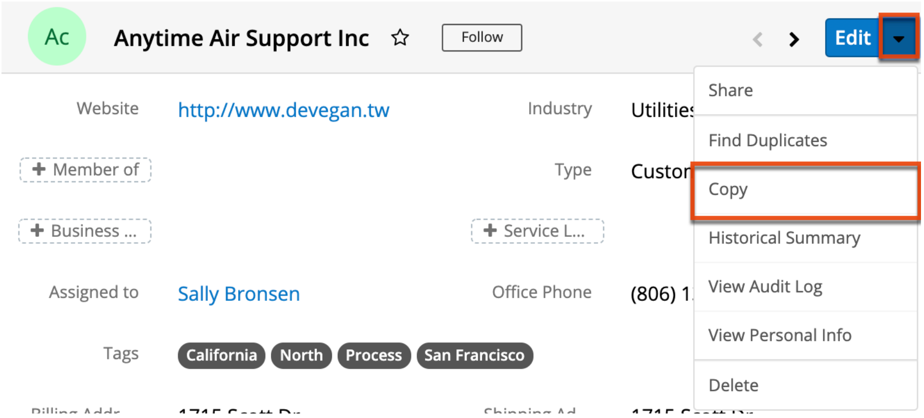
2. Enter appropriate values in the fields in the record view form. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

Creating via Duplication

You can also create a new record by duplicating an existing record. The Copy option is useful if the record you are creating has similar information to an existing record. Please note that existing subpanel relationships for the original record will not carry over to the duplicate.

The following steps cover creating an account by duplicating an existing account as an example:

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



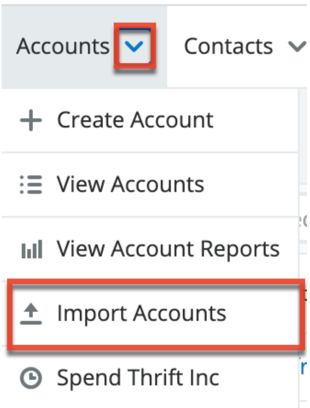
3. The displayed record view is pre-populated with the original account's values. Update the necessary fields, then click "Save".

Importing Records

The import function allows you to push multiple records of a single module into Sugar using a .csv file instead of creating them one-by-one. For more information, please refer to the Import documentation.

The following steps cover importing accounts as an example:

1. Click the triangle to access the Actions menu in 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.
    - The Errors tab will show records that were not imported due to errors detected during import.

Viewing Records

Sugar records can be viewed from a variety of locations including via the module's list view, record view, Recently Viewed menu, dashlets, and reports. 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 documentation.

Viewing via List View

Each module's list view displays all of the module's records that meet the current search criteria. To access the list view, simply click the desired module tab. While list views only show key fields, you can click the record's name to open the record view and access additional details. For in-depth information about list views, please refer to the List View section of this page.

Viewing via Record View

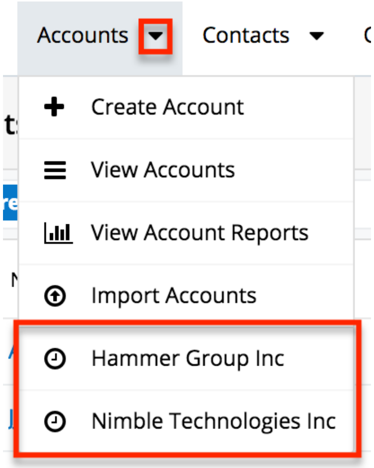
Each record's record view displays thorough record information including all relevant fields followed by subpanels of related records belonging to various modules. The record view can be reached by clicking a record's name link from anywhere in the application. For in-depth information about record views, please refer to the Record View section of this page.

Viewing via Tile View

Tile view allows users to visualize and engage with records in an intuitive drag-and-drop interface. Users can drag a tile from one column to another to change its state, stage, or expected close date. Tile view is available for the Cases, Tasks, Leads and Opportunities (with or without Revenue Line Items) modules. For in-depth information about using tile view, please refer to the Tile View section of this page.

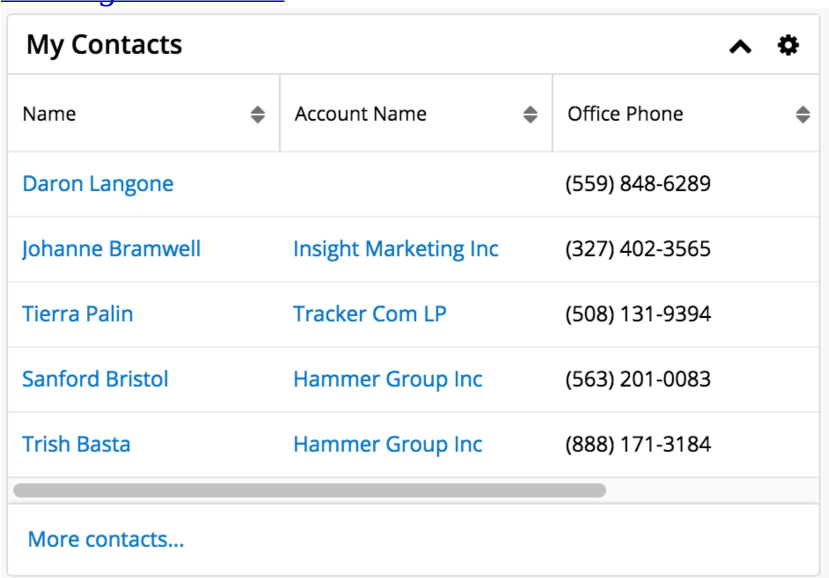
Viewing via Recently Viewed

As you work, Sugar will keep track of which records you have recently viewed. Click the triangle on the right of any module's tab to see a list of the 3 records you most recently viewed in that module. You can also click the triangle to the right of the Sugar cube icon to see records recently viewed from across all Sugar modules. Clicking a record name within these lists will open it in record view.



Viewing via Dashlets

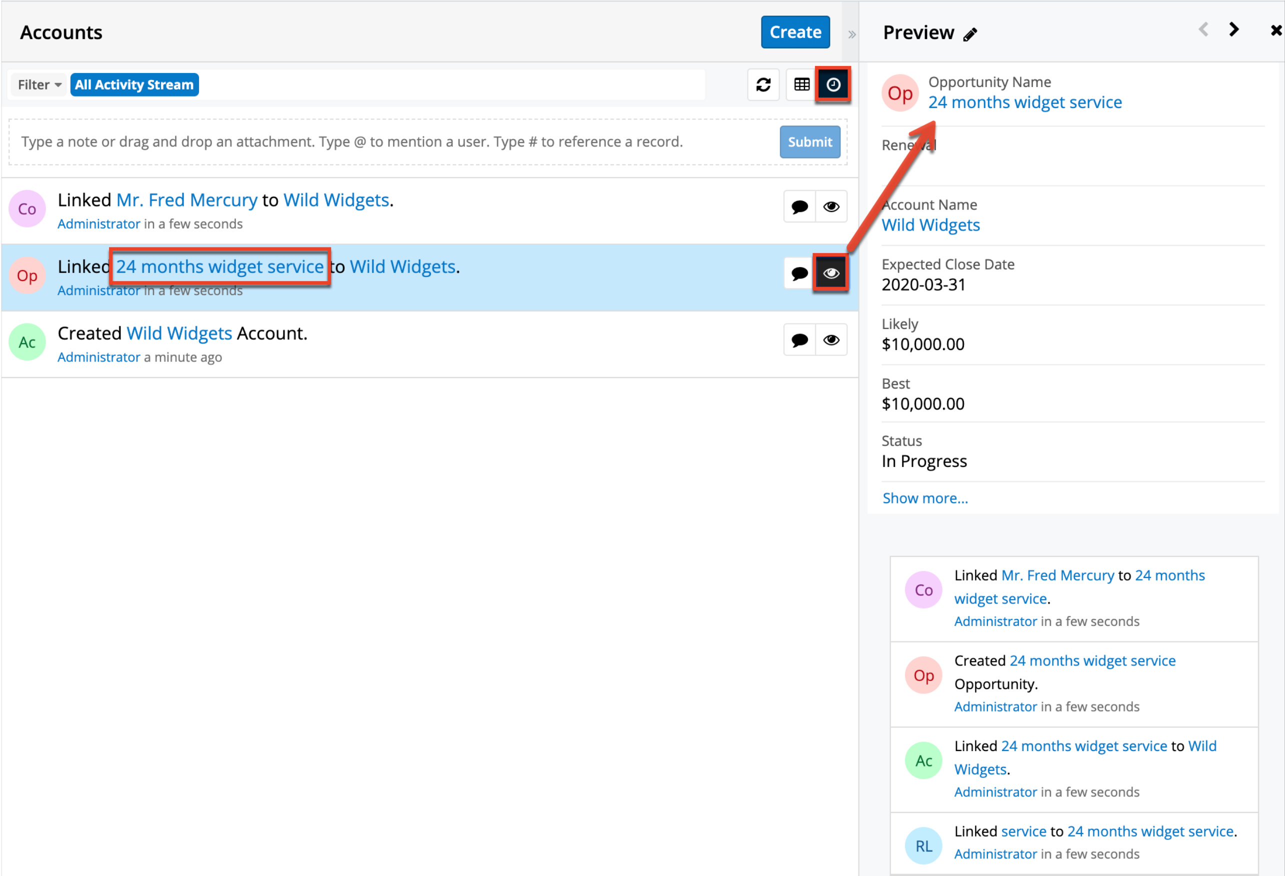
Sugar Dashlets allow you to get a quick view of various records, activities, reports, etc. Dashlets may be added to your Home page or to the intelligence pane of any module's list view or record view. List View dashlets display lists of records and their desired fields. Clicking a record's name from any dashlet will open it in record view. For more information on using dashlets, please refer to the [Intelligence Pane](#) documentation.



Viewing via Activity Streams

The activity stream allows you to see record changes and user posts relevant to records you are following in Sugar. Activity stream posts will display records when that record was modified or when a user mentions the record in their post.

Clicking the record's name link will open its record view. You can also preview the record directly from the activity stream by clicking the Preview button to the right of the post. For more information on viewing records via the activity stream, please refer to the Activity Streams documentation.

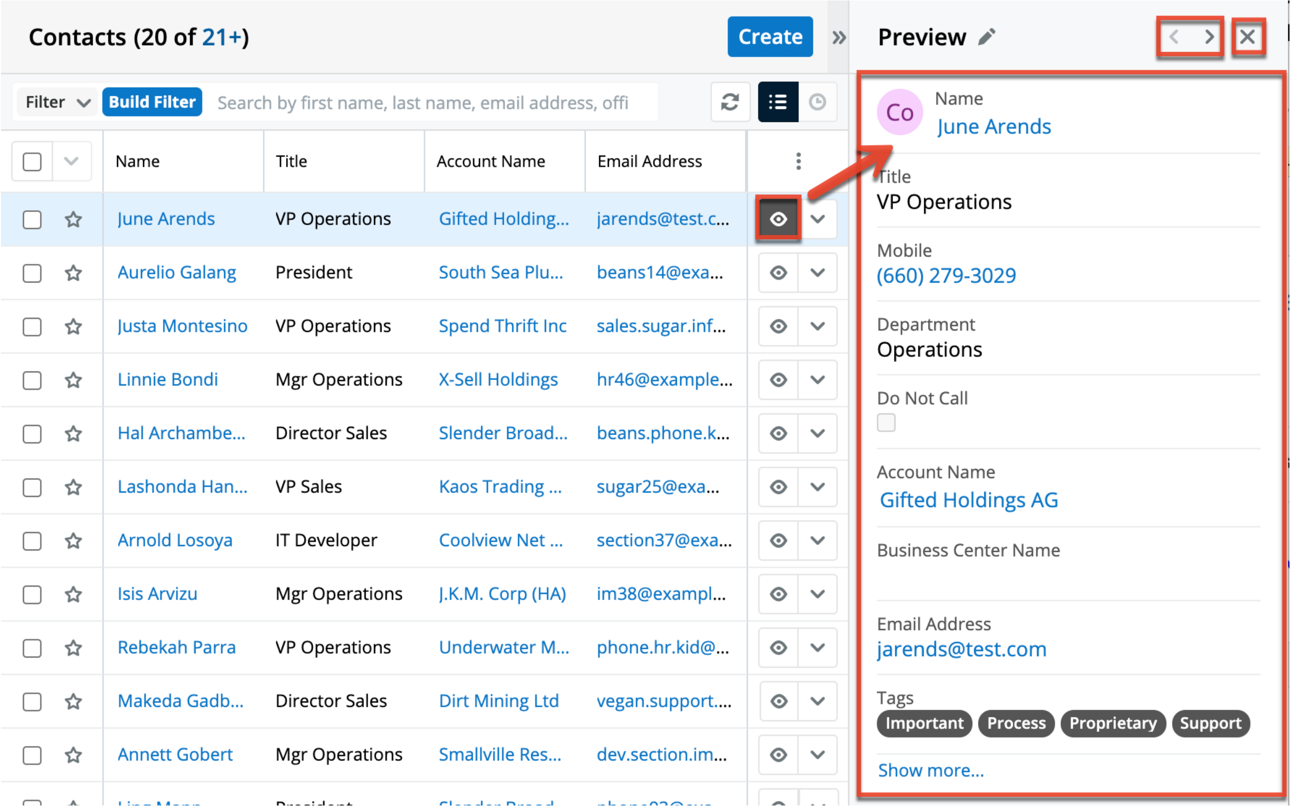


Note: Sugar's activity streams are disabled by default, but administrators can globally enable the functionality based on their organization's needs. For more information, refer to the System documentation in the Administration Guide.

Viewing via Preview

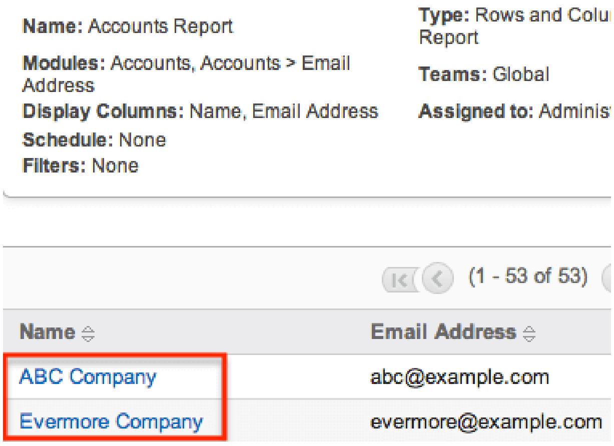
Record previews are accessible anywhere you see the Preview button (eye icon), usually to the right of a record's row. Click on the preview icon to expand or refresh the intelligence pane and view details about the record without leaving the current page. Record previews are available from list views, subpanels, duplicate search, Search and Select drawers, and activity stream posts.

In the preview, Sugar displays the topmost fields from the module's record view and the record's most recent activity stream entries in the intelligence pane. To view all of the fields that are on the record view, click "Show more...". From module list views, left and right arrow buttons at the top of the intelligence pane allow you to preview the next or previous record of the current list. To close a preview, simply click the "X" in the corner of the intelligence pane.

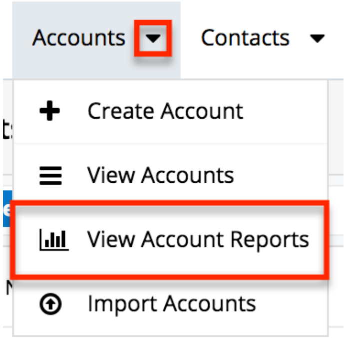


Viewing via Reports

The Reports module allows you to build, run, and manage reports to gather key record information. In addition to only displaying the fields and relationships you desire, reports can utilize complex filters to display specific subsets of your records. Once a report is run, you can click any record's name link in the results to open its record view. Please note that you can only directly access record views with Rows and Columns-type and Summation with Details-type reports as Summation-type and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the Reports documentation.



In addition to navigating to the Reports module and finding or building relevant reports, you can use the View {Module} Reports option to see only the reports based on the desired module.



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. Check with your system administrator if you cannot access the Reports module.

Searching for Records

Each module's list view includes a list view search to help you easily locate records in a module-specific manner. Matching records will be displayed in the list view below. Global search allows users to search for information across their entire Sugar database rather than restricting searches to a specific module. Sweet Spot search allows users to search for information, modules, and common actions across their entire Sugar database by using a keyboard shortcut. In each of these three searches, 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.

Global Search

For a brief introduction to global search, please refer to the Global Search section of this page. For in-depth information on both search methods as well as how wildcards are used in each method, please refer to the Search documentation.

Sweet Spot Search

The Sweet Spot feature allows you to quickly and conveniently search Sugar from anywhere within the application. Using the Sweet Spot feature, you can find and navigate to:

- The Home page Actions menu
- A module (e.g., Accounts, Bugs)
- Common actions in the modules' Actions menus (e.g., Create Account, View Account Reports)
- A specific record
- The user menu

You will only be able to see actions and records as allowed by your team membership, user access type, and assigned roles. If you are an administrator, you can also find and navigate to many of the sections on Sugar's Admin page.

To open Sweet Spot, use the appropriate shortcut key sequence for your operating system:

OS	**Shortcut**
Mac OS X	shift+cmd+space
Windows	shift+ctrl+space
Linux	shift+ctrl+space

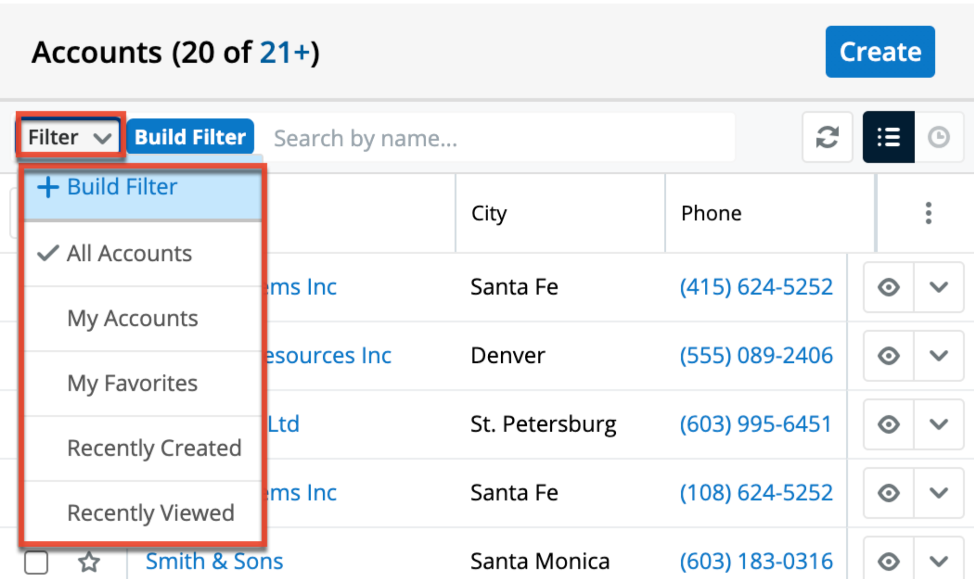
Once the Sweet Spot opens, begin typing your query and the search results will update as you type. For more information on configuring Sweet Spot search, please refer to the Search documentation.

List View Search

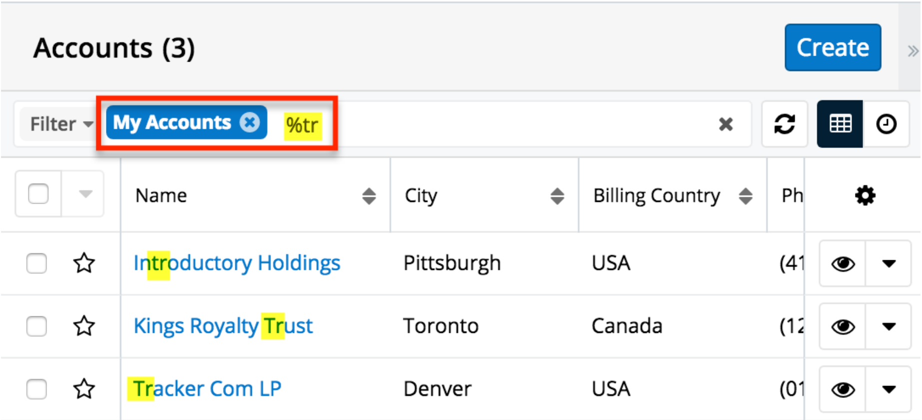
List view search enables users to easily search by the record's name within an individual module and pull up matching records in the list view. The search also provides a Filter option allowing you to narrow your search further using the available options. The following universal default filters are available in all modules:

- **Build Filter**: Create a new custom filter that you can use to filter your search
  Note: You can also click "Build Filter" to the right of the Filter option.
- **All "Module Name"**: Returns all records in the module (e.g., Accounts) to which you have access
- **My "Module Name"**: Returns only records assigned to you
- **My Favorites**: Returns only records you have marked as favorites
- **Recently Created**: Returns only records you created in the module within the last 7 days
- **Recently Viewed**: Returns only records you have viewed in the module within the last 7 days

Refer to the module page for default filters that are unique to specific modules (e.g., Meetings, Calls).



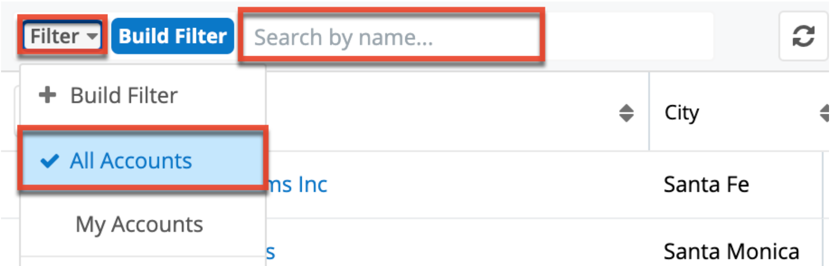
When you choose a filter, Sugar will return records that match both the selected filter and any name provided in the open Search box in the filtered list view results. For example, if you select "My Accounts" in the Filter options and enter a query in the Search box, Sugar will only return account records that are assigned to you and have names that match the search term. Once the search is complete, the relevant results will populate in the list view below the search bar.



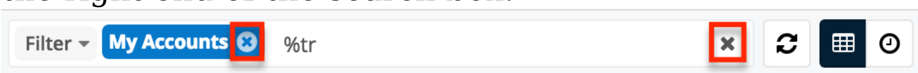
Note: The yellow highlighting in this image has been added for effect and will not appear in the application.

When you perform a search using a filter from the filter list, the filter will continue to apply if you navigate away from and then return to the module's list view. Any text query entered in the open Search box, however, will not be preserved.

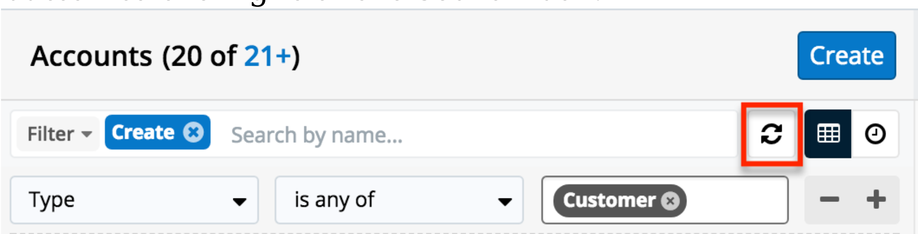
To see all account records to which you have access, simply select the All Accounts option in the filter and remove any text from the search bar:



To clear an applied filter, click the "x" on the selected filter option (e.g., My Accounts) in the Search box; to clear a text query from the search, click the "x" on the right end of the search box:



To update the filtered list view with the most recent results, click on the Refresh button to the right of the search box:



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 documentation. Administrators can configure what fields appear on the List View Search via Admin > Studio for certain modules. For more information on editing layouts, please refer to the Studio documentation.

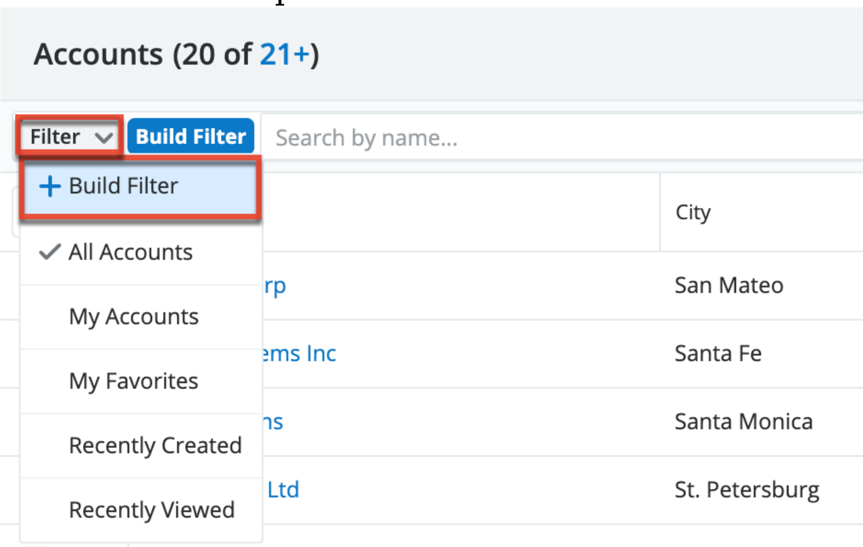
Creating a Filter

Users can also create new filters via the Build Filter option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the module's list view. You have the option to add multiple fields to your new filter by clicking the Add button to the right of the filter selection dropdown lists and set select operators along with their value(s). A filter's criteria need to be true for a record in order for it to appear in the list view search result. Additionally, filters with no specified values may be saved as a custom filter to act as a filter template when a user often searches using the same fields but with varying values. Please note that only fields you have view access for will appear in the Filter list when creating a search filter.

When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter.

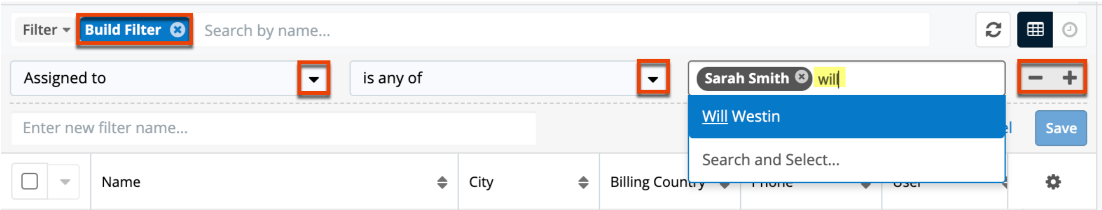
The following steps cover creating a new Assigned to filter in the Accounts module as an example:

1. Click the Filter option on the Accounts search bar then select "Build Filter".



   - You can also click "Build Filter" to the right of the Filter option.
2. Select the field you want to add to your filter as well as the condition and

matching criteria.
    - **Note**: Only fields you have view access for will be available to add to the Filter list.
3. To add additional fields to the new filter, click the Add button to the right of the filter.
    - To remove fields from the new filter, click the Remove button to the right of the filter.
    - To clear any filter values (e.g., Will Westin), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.



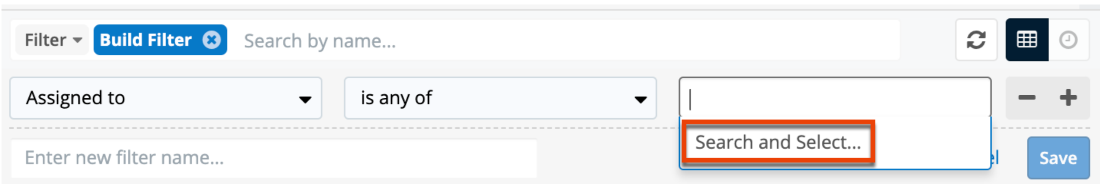
The list view will automatically display results matching your filters as you create and modify the criteria. To view the most recent matching records for an existing filter, click on the Refresh button to the right of the search box.

Note: When filtering a relate field using "is any of" or "is not any of", you can select up to 20 values.

Filtering User Fields

When filtering a User field, only users with an Active status are returned by default. If needed, you can filter list views to show records that are assigned to or created/modified by inactive users by filtering the user list on the Status field. As an example, use the following steps to search for records assigned to an inactive user:

1. Navigate to a Sidecar module (e.g., Accounts) and create a filter as described above.
2. Choose "Assigned to" for the field and click on "Search and Select" in the value field.



3. In the Search and Select window, create another filter with the following condition and criteria: "Status is any of Inactive".

4. Select the inactive user from the list.

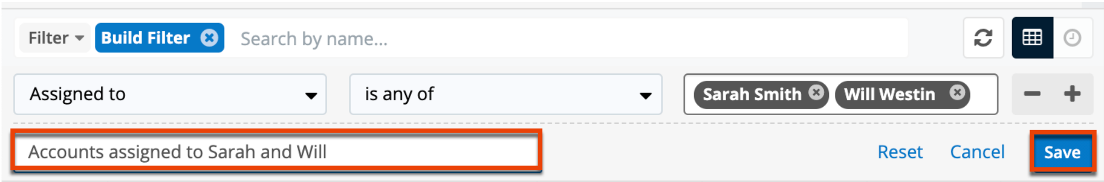
Upon returning to the Accounts list view, the list will be filtered to show only records assigned to the inactive user you selected.

Saving a Filter

Saving a filter will preserve the chosen fields as well as the condition(s) of the matching value(s). Additionally, it will allow users to easily select previously created and saved filters from the Filter options.

The following steps cover saving a new search by Name filter for the Accounts module as an example:

1. Create a new filter to perform a search on your desired fields.
2. Enter a name for the new filter (e.g., "Accounts assigned to Sarah and Will").



3. Click "Save" to add this filter to the module's Filter options.

You can also create and save a filter without entering any filter values (e.g., Sarah Smith) if you wish to enter new values each time you utilize the filter. When re-using the filter simply enter the appropriate filter value(s) and the list view will display the matching results. Once you are done with the filter, click "Reset" to the far right of the filter's name to clear the filter value(s).

The custom filter can always be edited as necessary by selecting the filter and updating the fields, conditions, values, etc. via the filter details panel. Once the necessary updates have been made, click "Save" to preserve the changes.

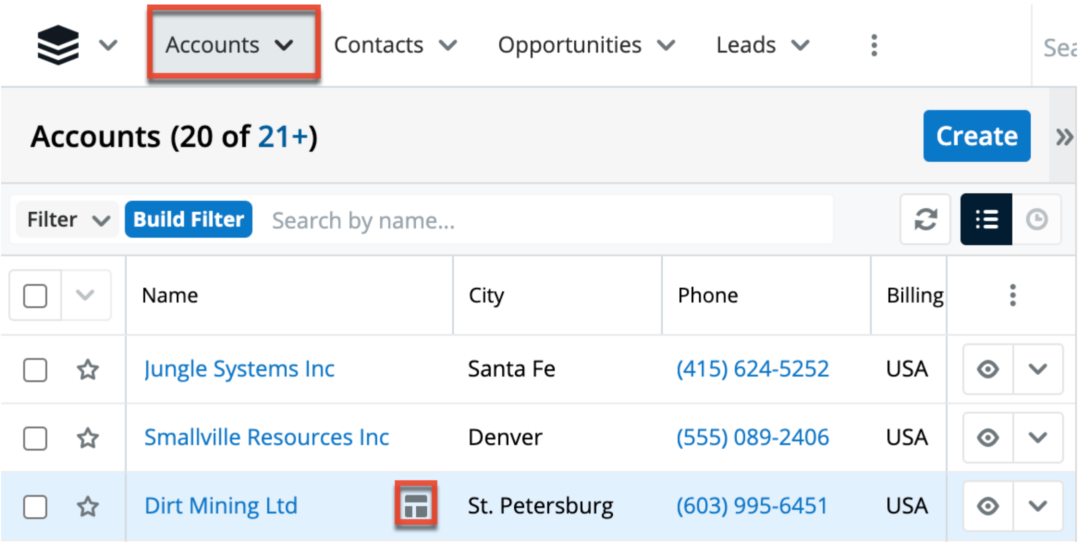
Please note that you can easily delete custom filters by selecting the filter (e.g., Accounts assigned to Sarah and Will) from the Filter list, clicking the filter's name on the Search bar, then clicking "Delete" on the filter details panel.

List View

A module's list view displays all records meeting the current search criteria and to which users have access. You can view the basic details of each record within the field columns of the list view or click the record's name to open the record view. To access a module's list view, simply click the module tab (e.g., Accounts) in the navigation bar at the top of Sugar.

Note: Hovering over certain links (e.g., a linked account name or call subject) in the record's row of the list view will display a Focus icon. Clicking the icon will reveal a Focus Drawer dashboard displaying a 360-degree view of the linked record through a set of dashlets. For more information on focus drawers, refer to the Focus Drawer section of this documentation.

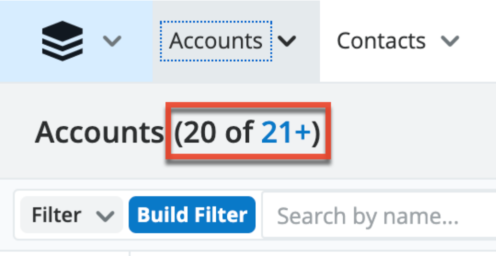
Please note that you will only be able to see records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation.



Users with administrator or developer access have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation.

Total Record Count

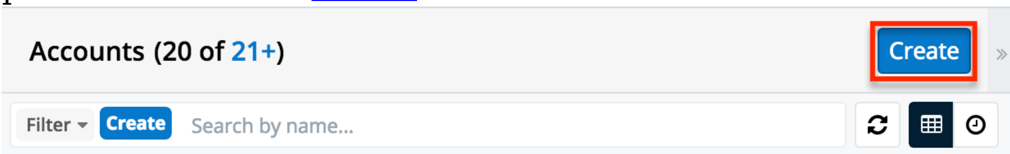
The list view displays the total count of records (e.g., "20 of 21+") on the upper left of the page next to the module name (e.g., Accounts). The count will capture the total number of records displayed on the current set of list view results. If there are additional records in the list view results set, a hyperlinked number (e.g., "21+") will display to the right of the initial count. Simply click the hyperlinked number in the parentheses to view the total count of all records in the list view result set.



Please note that, by default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information, please refer to the System documentation.

Create Button

The Create button on the upper right of the module's list view allows users to easily create new record's in the module. Once you click the button, the module's record view layout opens where you can enter all of the relevant information to create the new record. Please note that administrators can configure the Record View layout via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation.



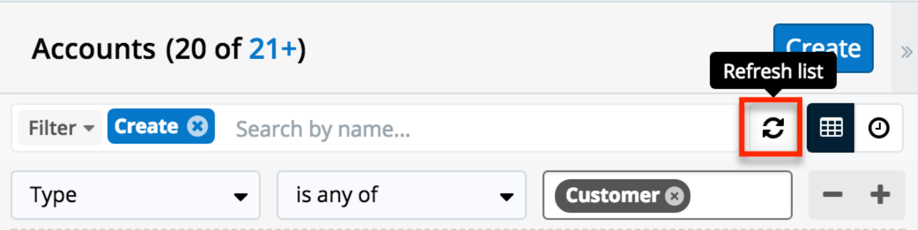
List View Search

To search for a specific record within a module or for a list of module records filtered by name, use the search bar located above any module's list view. Start typing a word into list view search and Sugar will retrieve all records that start with the given characters.

List view searches also support the system wildcard character (%) to retrieve results that contain certain characters in their name or title. For more information about performing module-specific searches via list view, please refer to the Search documentation.

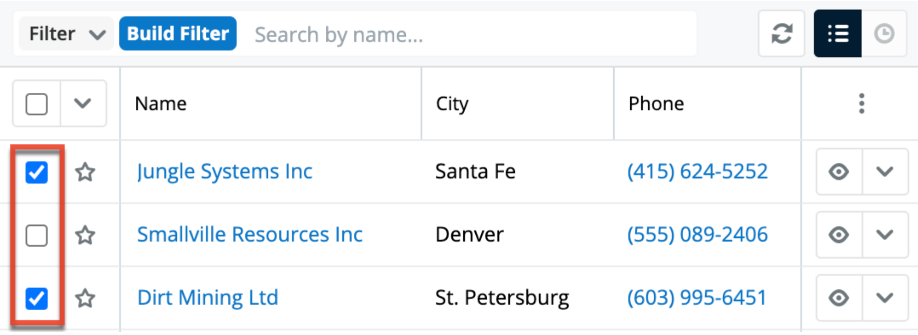
Refreshing Search Results

The list view's Refresh button provides a quick way to reload the results of any filtered or unfiltered list view without reloading the browser or losing any filter or search criteria you may have set. Simply click on the Refresh button to the right of the search box to load the most current list of matching records.

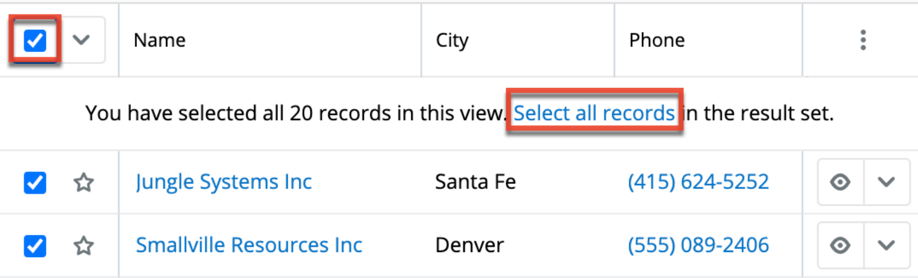


Checkbox Selection

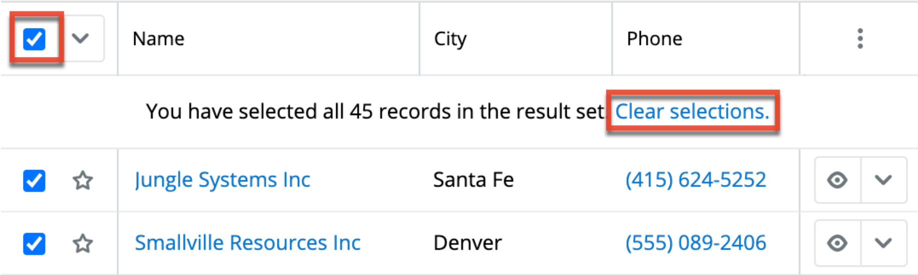
Users can perform various types of actions on module records by first selecting the desired records from the module's (e.g., Contacts) list view. To select individual records from the list view, mark the checkbox on the left of each record row.



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

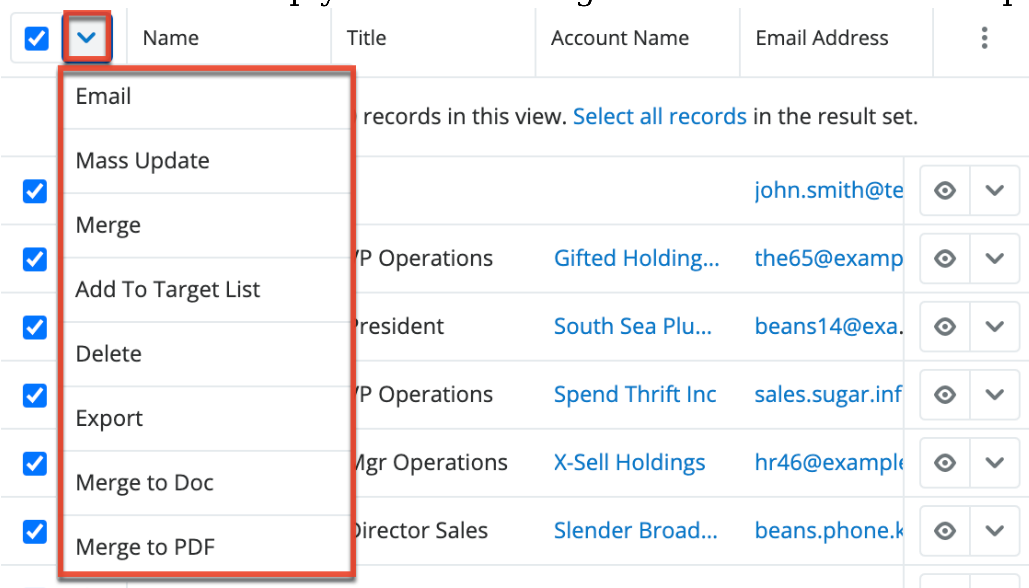


If you wish to clear the selection for all records on the list view result set, simply click "Clear selections" in the dialog. You can also clear the selections for all records by clicking the checkbox option again to remove the checkmarks.



Mass Actions Menu

The Mass Actions menu to the right of the checkbox option allows you to perform various actions on the currently selected records. Please note that the actions available to perform will vary between each of the modules. To access the Mass Actions menu simply click the triangle next to the checkbox option.



For more information on the actions available within a specific module, please refer to the list view section in the application guide pertaining to that module. The most common actions available in the Mass Actions menu are as follows:

Menu Item	Description
Email	For modules that include an Email field, send an email to one or more records' email addresses.
Mass Update	Mass update one or more records at a

	time.
Add To Target List	Add the selected records to a target list to be included or excluded from a mass marketing campaign.
Merge	Merge two or more duplicate records.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Delete	Delete one or more records at a time.
Export	Export one or more records to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

The following sections will cover the most common type of actions available in the Mass Actions menu.

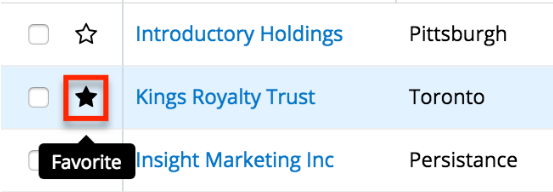
Favorite Designation

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

The following steps cover marking records as favorites via the Accounts list view as an example:

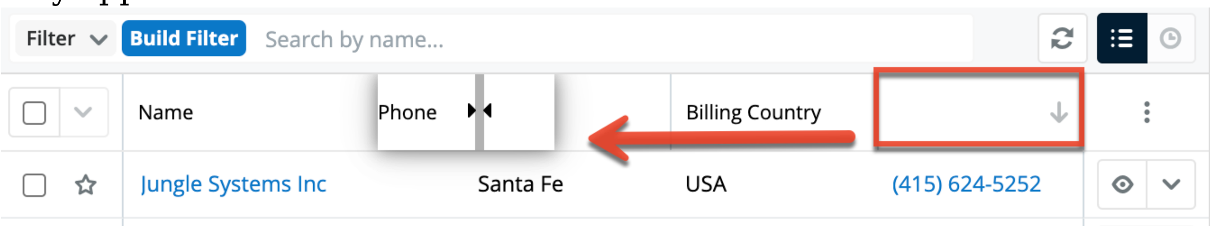
1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the List View Search to find the Account records you wish to mark as

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.



Column Reordering

List view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order is saved to the database so that the order will remain for a user upon subsequent visits to the module, even if the browser cache is cleared. You can reset the column order back to the default view by clicking the three-dots menu to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current column order differs from the default order.



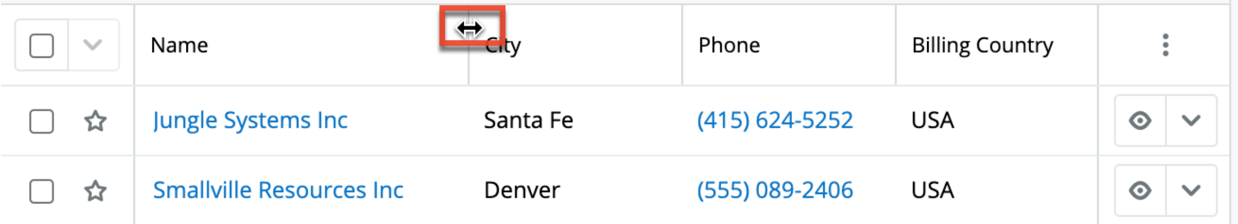
Column Resizing

Users can easily adjust the size of columns in list views per their viewing preference. Simply place your cursor on the column divider, and when the left-and-right arrow appears, click and drag the column to the desired size.

The set column width will be preserved when you navigate away from the page or resize your browser window. Sugar will render the preferred column size across sessions. You can reset the column width back to the default size by clicking the three-dots menu to the far right of the list-view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the current list view is different from the default column width.

Changes to the column width made by administrators in Studio are only respected if the user has not resized the specific column in the list view. The column width set by the user will supersede the default column width configured in Studio until the user resets the list view back to the default widths. For more information on how admins can set column widths, please refer to the Studio documentation.

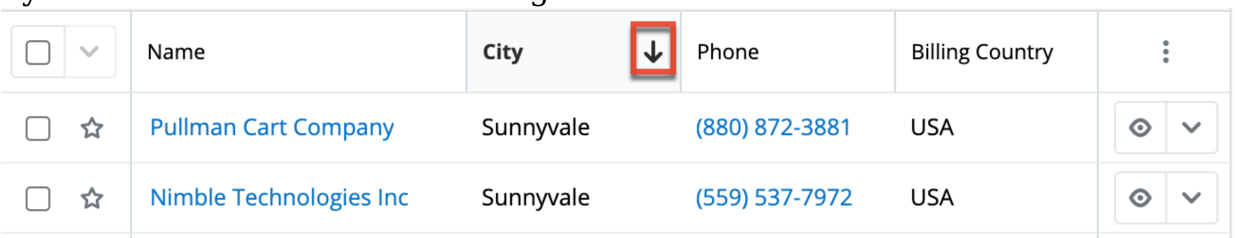
Note: Sugar enforces a minimum width for currency fields (e.g., Best, Likely, etc.) in list view columns to prevent the columns from being collapsed beyond this limit.



Column Sorting

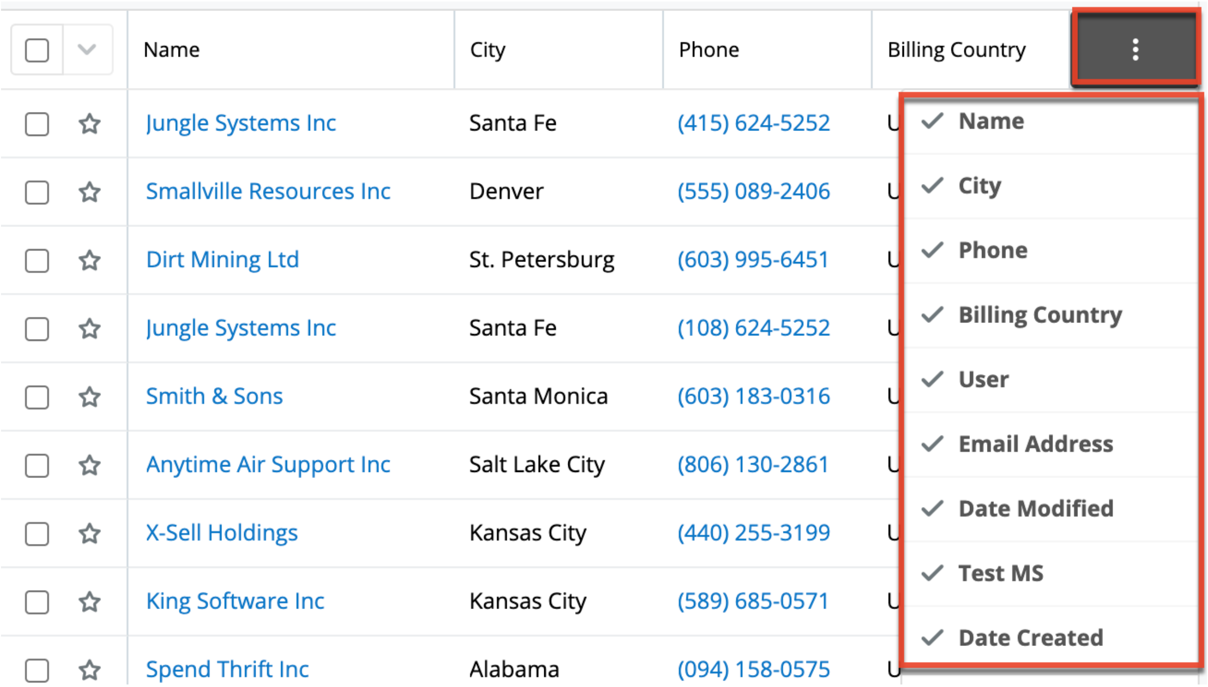
Sugar's list view provides users the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that columns that allow sorting have an arrow that appears when hovering over the column header. You can click the column header again to reverse the sort order.

Note: List views may only be sorted by one column at a time and cannot be sorted by custom relate fields or the Tags field.



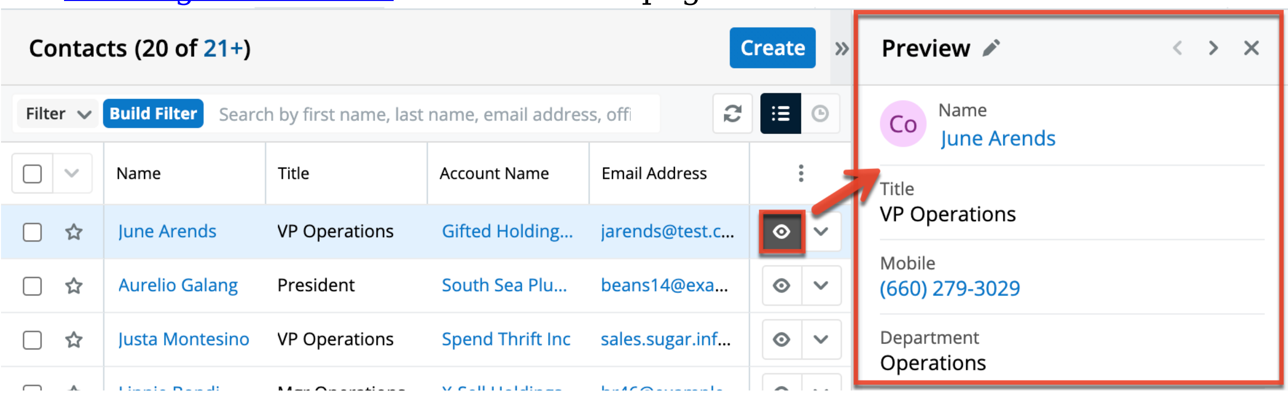
Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the three-dots menu to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column in your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation.



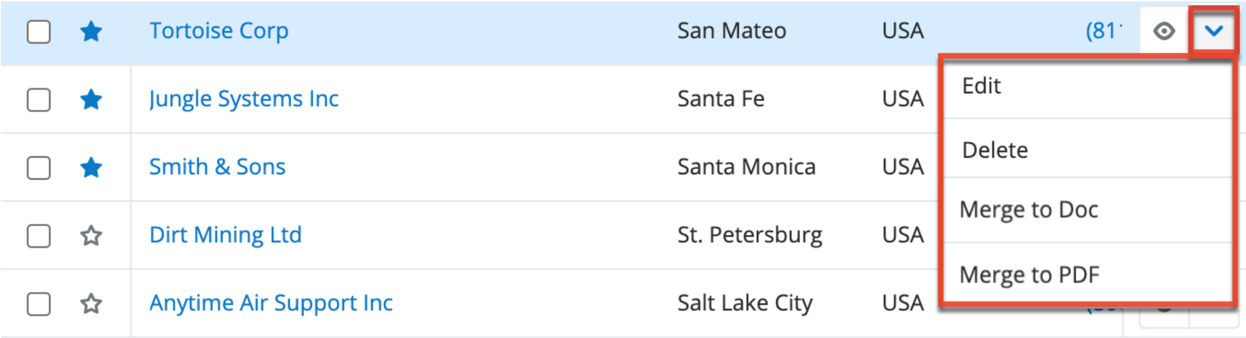
Preview

Users can preview a record's details directly from the module's list view by clicking the Preview button to the far right of each record's row. Please refer to the [Viewing via Preview](#) section of this page for more information.



Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to edit, follow, delete, etc. specific records directly from the list view. For example, users have the ability to inline-edit the display column fields directly from the list view by clicking the triangle next to the Preview icon then selecting "Edit".

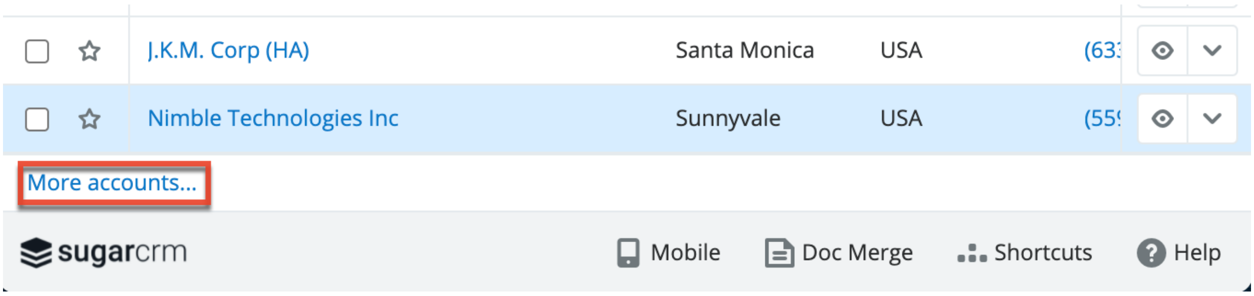


The options in the Record Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this record.
Follow	(Available if Activity Streams are enabled) Follow changes to this record in your activity stream.
Delete	Delete this record.
Convert	For the Leads module, convert this lead.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

More Records

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

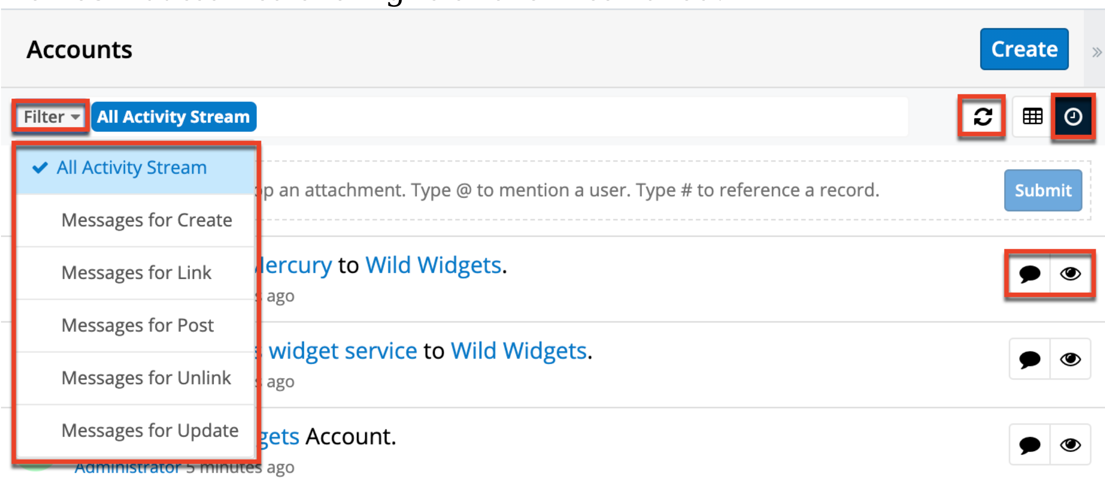


Activity Stream

The module's activity stream displays user posts made directly via the module as well as record posts relevant to the module record. To view the module's activity stream, simply click the Activity Stream button to the right of the list view's search bar. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation.

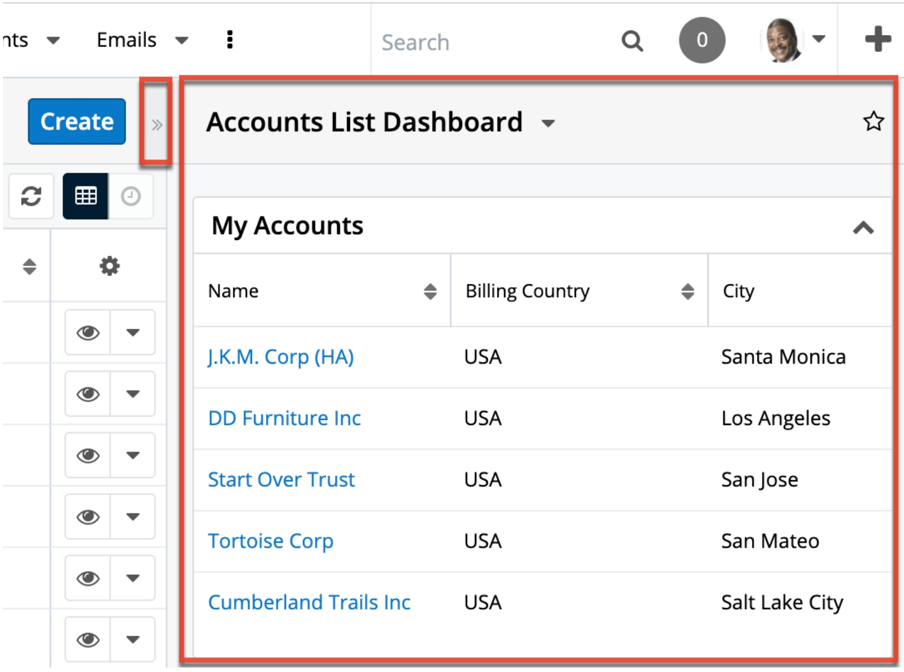
Note: Sugar's activity streams are disabled by default, but administrators can globally enable the functionality based on their organization's needs. For more information, refer to the System documentation in the Administration Guide.

You can add comments to posts using the comment button to the far right of each post. You can also preview the record referenced in record posts by clicking the Preview button to the right of each post. The activity stream can be filtered to only display certain messages (e.g., Messages for Create, Messages for Update, etc.) by clicking "Filter" above the post input box and selecting the desired message type. You can also refresh the activity stream to view its latest entries by clicking the Refresh button to the right of the filter area.



Dashboards

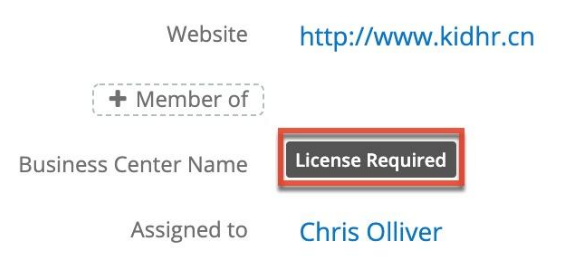
To the right of list views, the intelligence pane displays dashboards when not displaying a record preview. Dashboards are sets of dashlets configured for the specific list view to display useful Sugar data. An out-of-the-box default dashboard will likely be initially displayed on your list view intelligence pane. Sugar admins are able to create and push custom default dashboards to your views. You may also create personal dashboards using the dashlets and configurations that best suit your business needs. All dashboards can also be shared with teams of users who can then pull the dashboards to their views as desired. Ensure the intelligence pane is expanded using the arrow button at the top right of the list view. For more information, refer to the Dashboards and Dashlets documentation.



Record View

The module's record view displays thorough information regarding the record such as name, email address, phone number, etc. Beneath the fields, you can toggle between viewing a record's subpanels of related records (e.g., Opportunities, Leads) and the record's activity stream. The record view can be reached by clicking a record's link from anywhere in the application including from the module's list view.

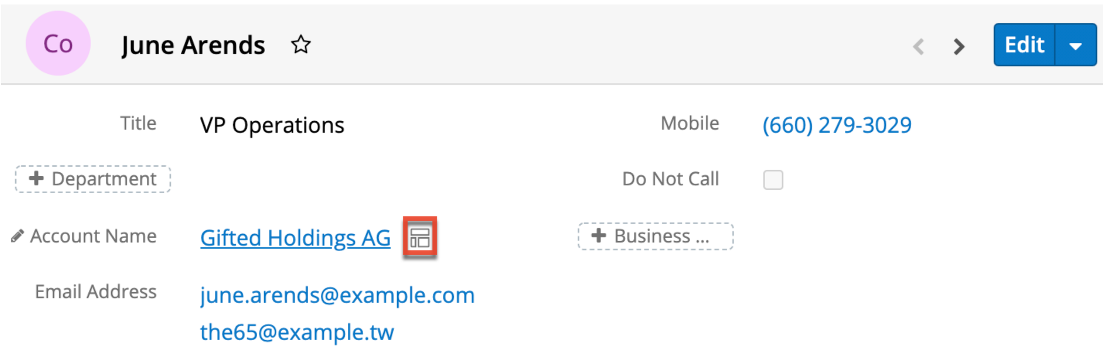
Please note that you will only be able to view a record according to your team membership, user type, and role restrictions. In addition, if you can view a record but do not have the required license type to view a particular field on that record, the field value is replaced with a pill containing the text "License Required":



For more information on teams, roles, or license types, please refer to the [Team Management](), [Role Management](), and [User Management]() documentation.

Some modules' record view may be customized based on either the logged-in user's role or by an available dropdown field's value. A role-based record view layout appears as static to the user and only changes depending upon the role of the logged-in user. A dropdown field-based layout is dynamic and will change depending on if the selected value in a dropdown has a customized layout. Each time a selected value prompts a change to the layout, an alert appears with the option to click "Cancel". Doing so will change the dropdown value back to what was selected previously and will revert the layout change. The alert will disappear without action required from the user, the user may continue working in the new layout, and any fields that were edited but now hidden by the new layout will retain their changes.

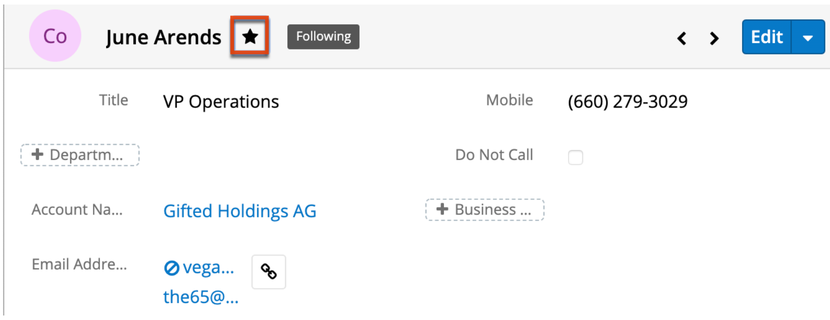
Users with administrator or developer access have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the [Studio]() documentation.



Note: Hovering over certain links to Sugar records (e.g., a linked account name) in the record view will display a Focus icon. Clicking the icon will reveal a Focus Drawer dashboard displaying a 360-degree view of the linked record through a set of dashlets. For more information on focus drawers, refer to the [Focus Drawer]()section of this documentation.

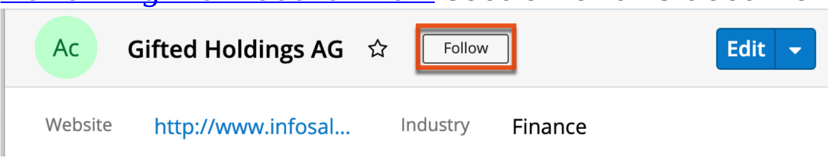
Favorite Designation

Users have the option to mark records as favorites via the module's record view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the module tab. In the module's record view, the star to the right of the record's name is dark gray once favorited.



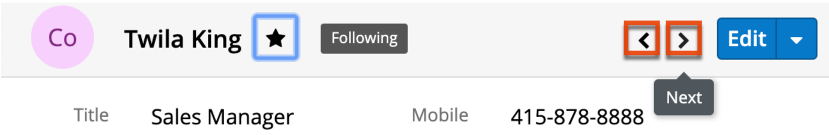
Following Designation

Users can also choose to follow changes to specific records that they have access to in Sugar by clicking the Follow button to the right of the record's name. The ability to follow records allows each user to personalize their activity stream by specifying which records' posts should appear on the activity streams displayed on their Home page and in module list views. Please note that you will automatically follow the records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record. For instructions for toggling the Following button on a record view, please refer to the Following via Record View section of this documentation.



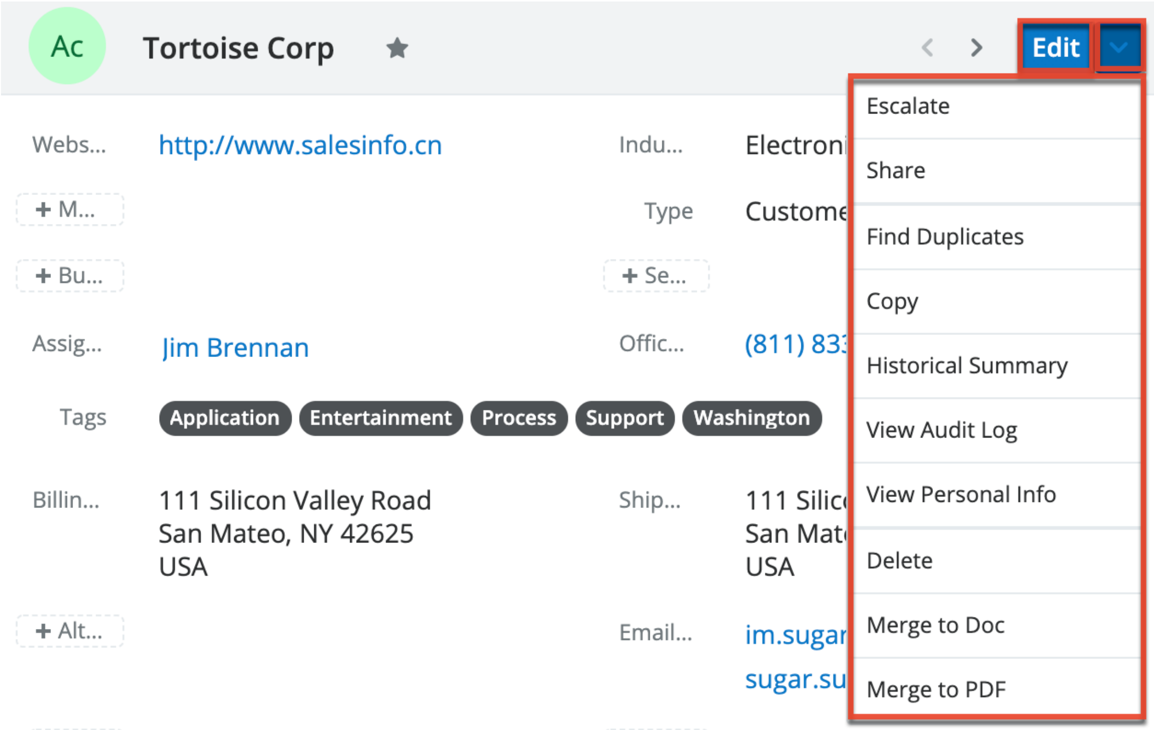
Next or Previous Record

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



Actions Menu

The Actions menu on the top right of each module's record view allows you to perform various actions (e.g., edit, copy, delete) on the current record.



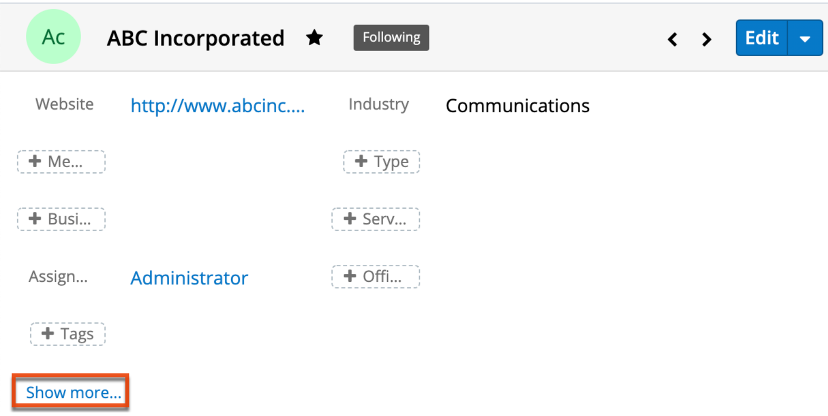
Please note that certain options (e.g., Convert Lead) in the Actions menu can vary between the various modules and some custom options may have been added by your administrator via an Action Button. The following sections will cover the most common action items across the modules. For more information on a specific action not listed below, please refer to the record view actions menu section for the specific module's documentation in the Application Guide.

Menu Item	Description
Edit	Edit this record.
Share	Share a link to this record via email.
Download PDF	Download record information as a PDF file.
Email PDF	Email record information as a PDF

	attachment.
Find Duplicates	Locate potential duplicates of this record.
Copy	Duplicate this record.
Historical Summary	View a historical summary of activities (e.g., calls, meetings related to this record).
View Audit Log	View a sequence of changes made to this record.
View Personal Info	Display this record's fields which an admin has designated as personal information.
Delete	Delete this record.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

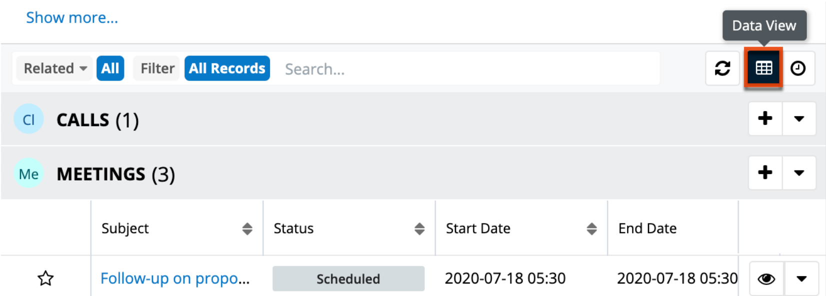
Show More

The record view typically displays a few key fields (e.g., website, mobile phone, office phone) on the business card panel with the option to view more fields by clicking the "Show more..." link on the bottom left. Please note that administrators can configure the fields that appear on the business card panel via Admin > Studio > Layouts > Record View. For more information on editing layouts, please refer to the Studio documentation.



Subpanels

Beneath the module (e.g., Accounts) record's fields are subpanels containing related records from various modules (e.g., Contacts, Leads, Opportunities). You can create a related record as well as link an existing record directly from the subpanel. Once the records appear within the subpanel, users can preview the record's detail and edit the record's data directly from the record view. Please note that the subpanels are viewable when you access the Data View section of the module's record view.



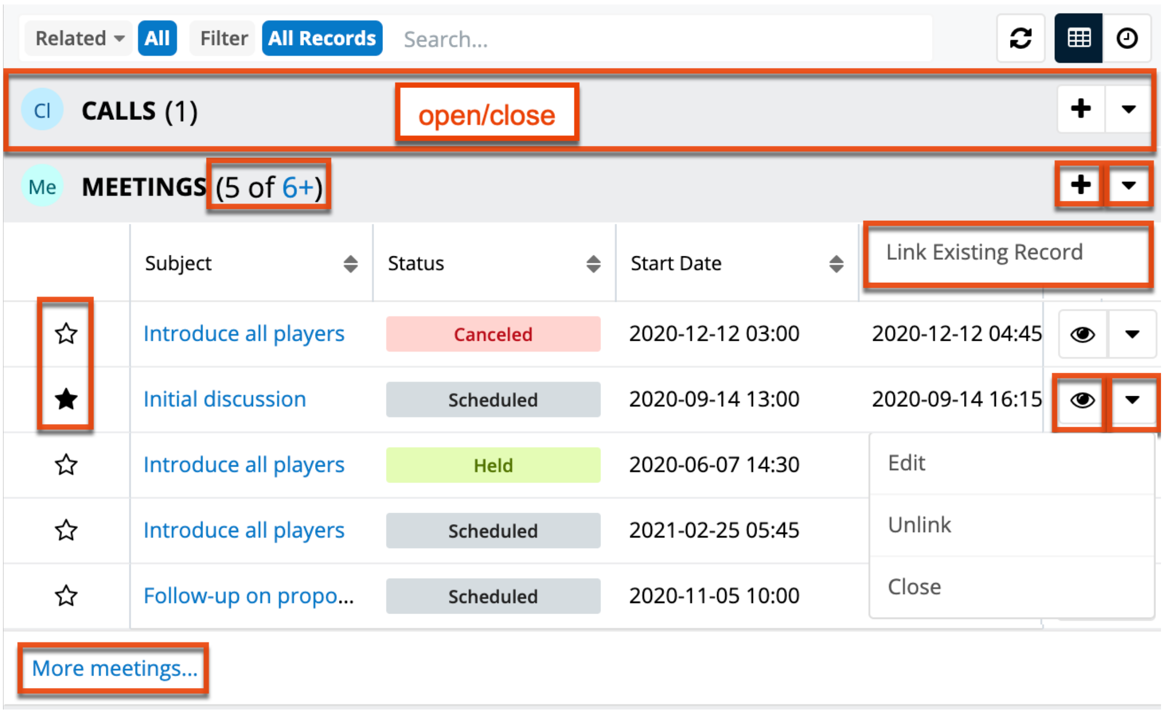
Note: Administrators may choose to disable a module's subpanels for the entire instance via Admin > Display Modules and Subpanels. For more information, please refer to the Developer Tools documentation.

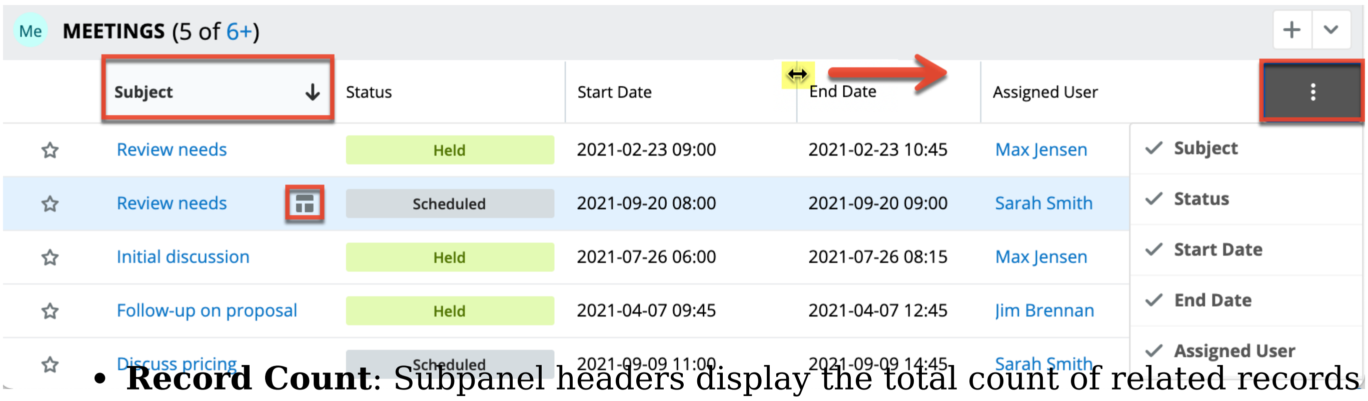
Related Record Subpanels

Subpanels under a module's record view contain its related records. Each relationship between two modules has a type, and that type determines if the relationship produces a field or a subpanel for each side. When a record of the primary module can be related to only one record of a second module (i.e., 1-1 or M-1 relationships), the relationship is displayed as a field on the primary module. When the record can be related to multiple records of a second module (i.e., 1-M or M-M relationships), the relationship is displayed as a subpanel instead since subpanels can hold many records.

For example, an account may be related to multiple contacts, so the related contacts are displayed in a subpanel on the account record. Administrators or users with developer-level role access may choose to change a subpanel's title and included fields 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.

Related-record subpanels provide the following information and capabilities:





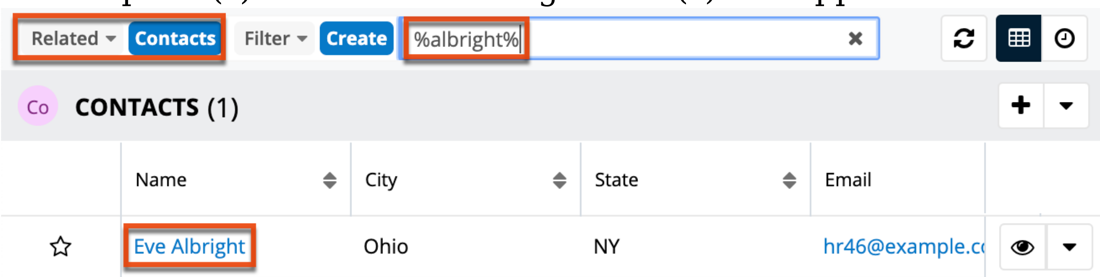
- **Record Count**: Subpanel headers display the total count of related records (e.g., "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g., "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- **Collapse or Expand**: Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
    - **Note**: Administrators can choose to disable the sticky feature and collapse all subpanels by default via Admin > System Settings. For more information, please refer to the System documentation.
- **Column Widths**: Place your cursor on the column divider and, when the double arrow cursor appears, click and drag the column to the desired size. The column width will be preserved when you navigate away from the page. You can restore the default column widths by selecting "Reset default widths" from the three-dots menu.
    - **Note**: Sugar enforces a minimum width for currency fields in list

view columns to prevent the columns from being collapsed beyond this limit.
- **Column Sort**: Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g., from ascending to descending).
- **Column Display**: You can also click the three-dots menu to change the list of fields that display as column headers.
    - **Note**: The list of available fields/columns is determined by the default vs hidden fields set in Admin > Studio.
- **Create a New Linked Record**: Click the Add button on the upper right of a subpanel to relate a new record to the record you are currently viewing. Please note that the Link Existing Record option is not available when the relationship is required in the related module (e.g., in an account's Opportunities subpanel).
    - **Note**: Because creating a new related record opens a drawer on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- **Link Existing Record**: Click the triangle to the right of the Add button then select "Link Existing Record" to relate existing records to the record you are currently viewing.
    - **Note**: Because linking an existing record opens a drawer on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- **Favorites Designation**: Click the star on the left of a record's row to toggle it as a favorite. A dark-gray star indicates that the record is a favorite while a white star indicates it is not. For more information, please refer to the Favoriting Records section of this page.
- **Hyperlink Fields**: Blue field values, such as record names, may be clicked to open the record in record view. Record view provides a complete picture of the record and is described in detail in the Record View section of this page. Email addresses also appear in blue and can be clicked to compose an email to that recipient.
- **Focus Icon**: Hovering over certain links (e.g., meeting subject or a linked account name) in the record's row will display a Focus icon. Clicking the icon will reveal a Focus Drawer dashboard displaying a 360-degree view of the linked record through a set of dashlets. For more information on focus drawers, refer to the Focus Drawer section of this documentation.
- **Record Actions Menu**: Click the triangle on the right of a record's row to access the Record Actions Menu which includes the following options:
    - **Preview**: To preview a record by displaying its fields and activity stream in the right-hand side drawer, click the Preview button (eye icon) to the far right of the record's row. For more information, please refer to the Viewing via Preview section of this page.
    - **Edit**: To inline edit the record directly within the subpanel, choose

"Edit" from the Actions menu on the right of the record's row and click "Save" to preserve the changes.
    - **Unlink**: To delete the relationship between the two records, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship but does not delete the record itself. Please note that the Unlink option is not available when the relationship is required in the related module (e.g., in an account's Opportunities subpanel).
    - **Additional Options**: Some modules may have additional options available that are covered in the individual module's documentation.
- **More Records**: By default, Sugar displays up to five records in each subpanel though administrators can alter the number via Admin > System Settings as described in the System documentation. If additional related records exist, click "More <Module Name>..." (e.g., "More Accounts...") at the bottom of the subpanel to load the next set.

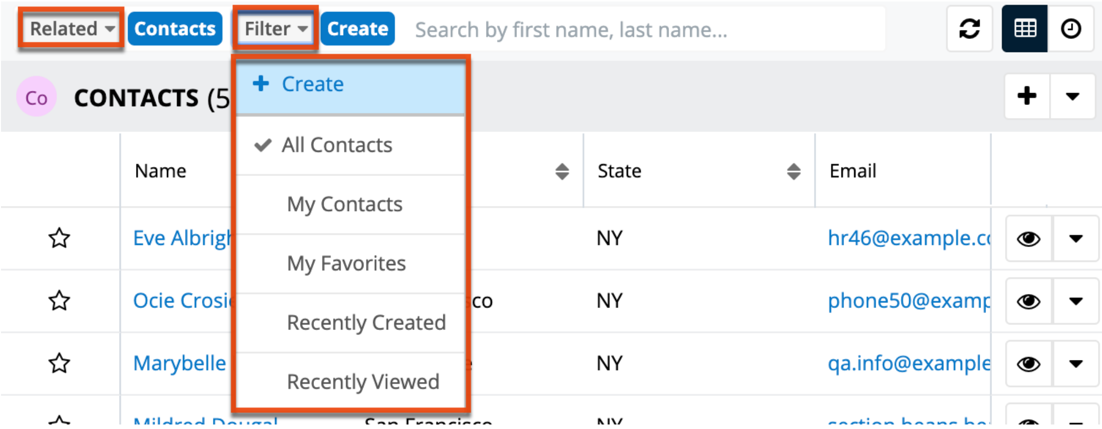
Filtering Subpanels

While in Data View, all of the related records will be displayed beneath the record's fields. Users have the ability to search for records that appear in the subpanels as well as filter the view to only display a specific module (e.g., Leads, Contacts). To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below.



To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. Returning to the page will automatically display the results of your last filter. Please note that search strings entered in the open Search box are not preserved when navigating away.

When a Sidecar module (e.g., Contacts, Leads, Tasks) is selected from the Related options, you have the option to filter the related subpanels further using one of the available options (e.g., My Favorites, Recently Created). Please note that you can also create custom filters for related Sidecar modules. Once the related module (e.g., Contacts) is selected, either click the Filter option and select "Create" or click "Create" to the right of the Filter option. For more information on creating a related records filter, please refer to the [Creating a Related Records Filter](#) section of the Search documentation.

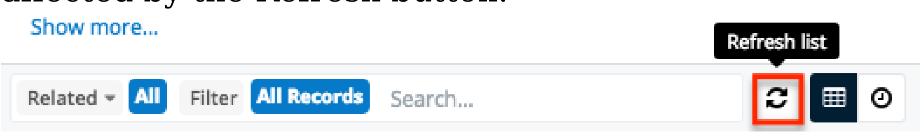


Reordering Subpanels

Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order is saved to the database so that the order will remain for a user upon subsequent visits to the module, even if the browser cache is cleared.

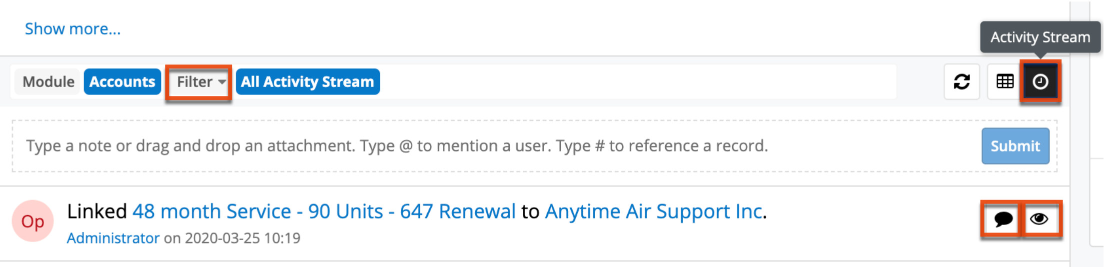
Refreshing Subpanels

To refresh the results of a filtered or unfiltered subpanel view, simply click on the Refresh button to the right of the search box. This will reset the current view of expanded subpanels with the most current results that match your search and filter criteria. Please note that subpanel results in a collapsed state are not affected by the Refresh button.



Activity Stream

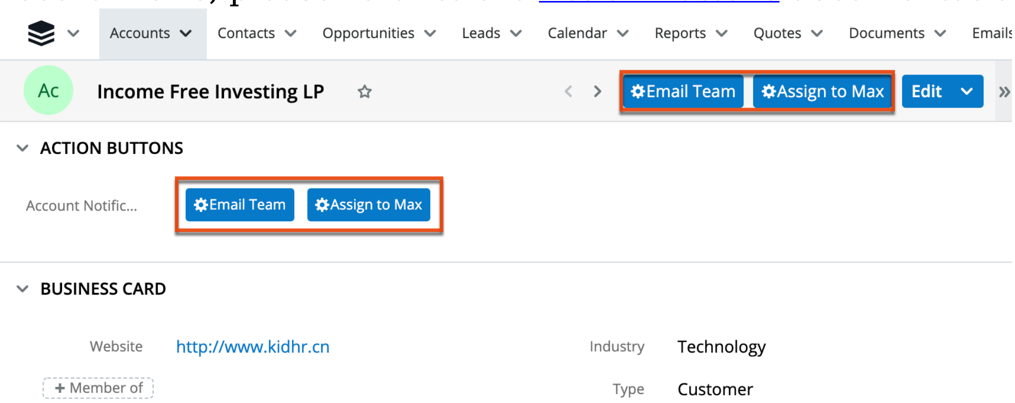
The record view's activity stream displays user posts and record posts specific to the individual module record. To view the record's activity stream, simply click the Activity Stream button below the record's fields. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on how to add posts to the activity stream, please refer to the Activity Streams documentation. You can add comments to posts by clicking the Comment button to the far right of each post, entering your comment, then clicking "Reply". You can also preview the record referenced in the record post by clicking the Preview button. The activity stream can also be filtered to only display certain messages (e.g., Messages for Create, Messages for Update) by clicking "Filter" above the post input box then selecting the desired message type.



Note: Sugar's activity streams are disabled by default, but administrators can globally enable the functionality based on their organization's needs. For more information, refer to the System documentation in the Administration Guide.

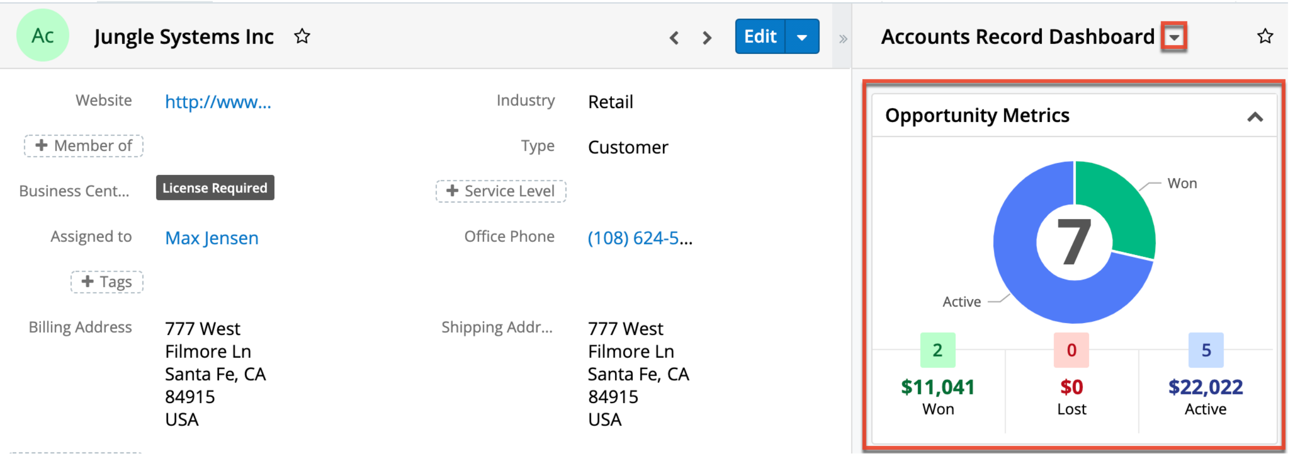
Action Buttons

In addition to the buttons shown on records in this section, your admin may have added customized buttons to provide shortcuts to common actions that are unique to your organization. Action Buttons may appear on the record, the record's header, or both. For information on configuring and adding Action Buttons to record views, please refer to the Action Buttons documentation.



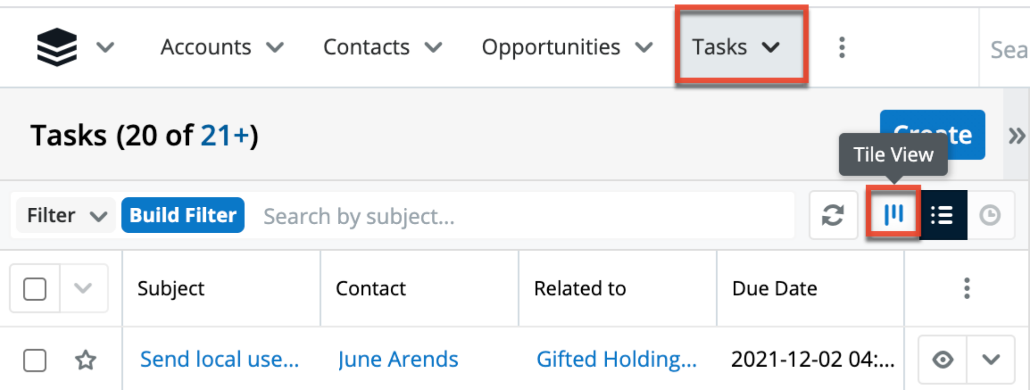
Dashboards

To the right of record views, the intelligence pane displays dashboards when not displaying a related record preview. Dashboards are sets of dashlets configured for the specific record view to display useful Sugar data. An out-of-the-box default dashboard will likely be initially displayed on your record view intelligence pane. Sugar admins are able to create and push custom default dashboards to your views. You may also create personal dashboards using the dashlets and configurations that best suit your business needs. All dashboards can also be shared with teams of users who can then pull the dashboards to their views as desired. Ensure the intelligence pane is expanded using the arrow button at the top right of the record view. For more information, refer to the Dashboards and Dashlets documentation.

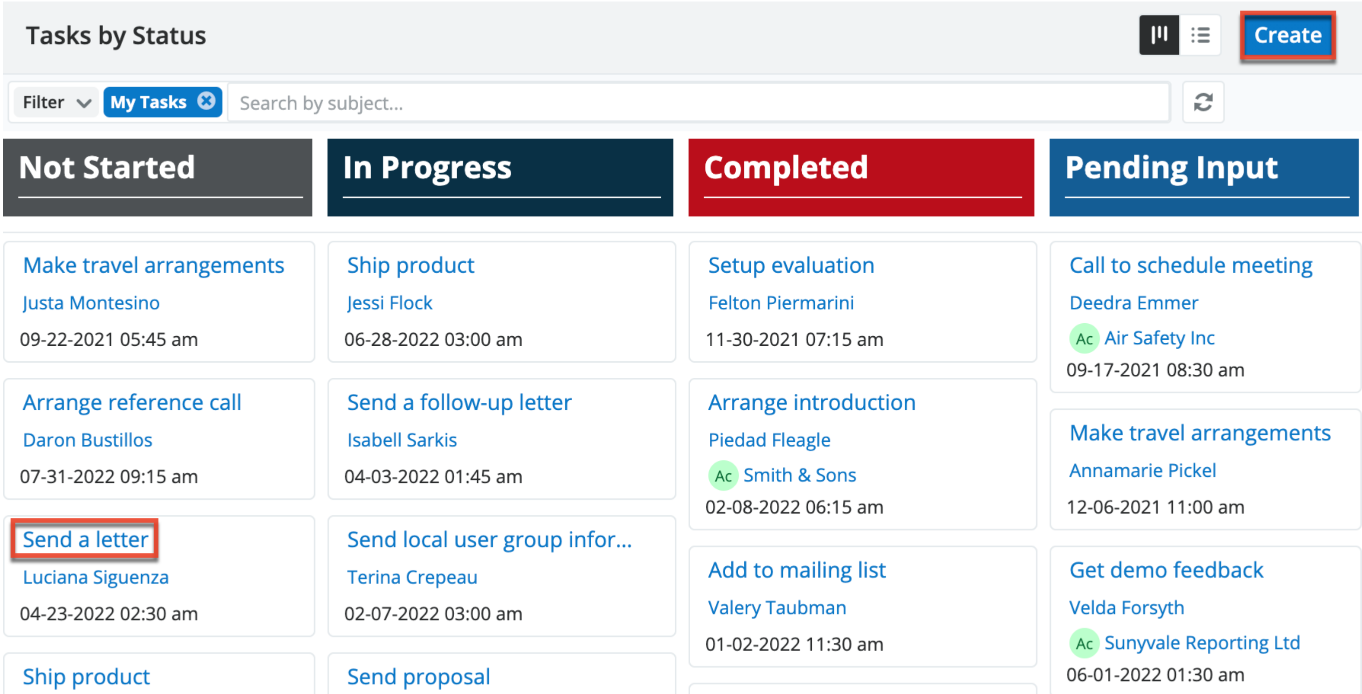


Tile View

For cases, tasks, leads, and opportunities, a unique tile view is available that displays records in an intuitive drag-and-drop interface. To access tile view, navigate to the Cases, Tasks, Leads, or Opportunities list view and click on the Tile View icon next to the search bar.



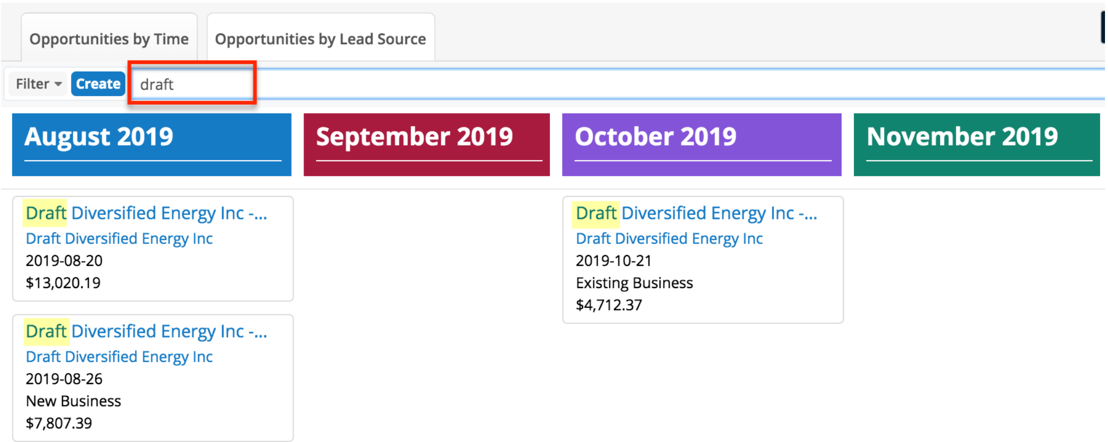
New records can be created from the tile view by clicking the Create button on the upper right. You can also edit any records displayed in the tile view by clicking the record's name/subject link within the tile or by dragging a tile from one column to another to change its stage, status, or expected close date depending on the current layout. For information on configuring Tile View layouts, refer to the Tile View Settings documentation in the Administration Guide.



Working With Records in Tile View

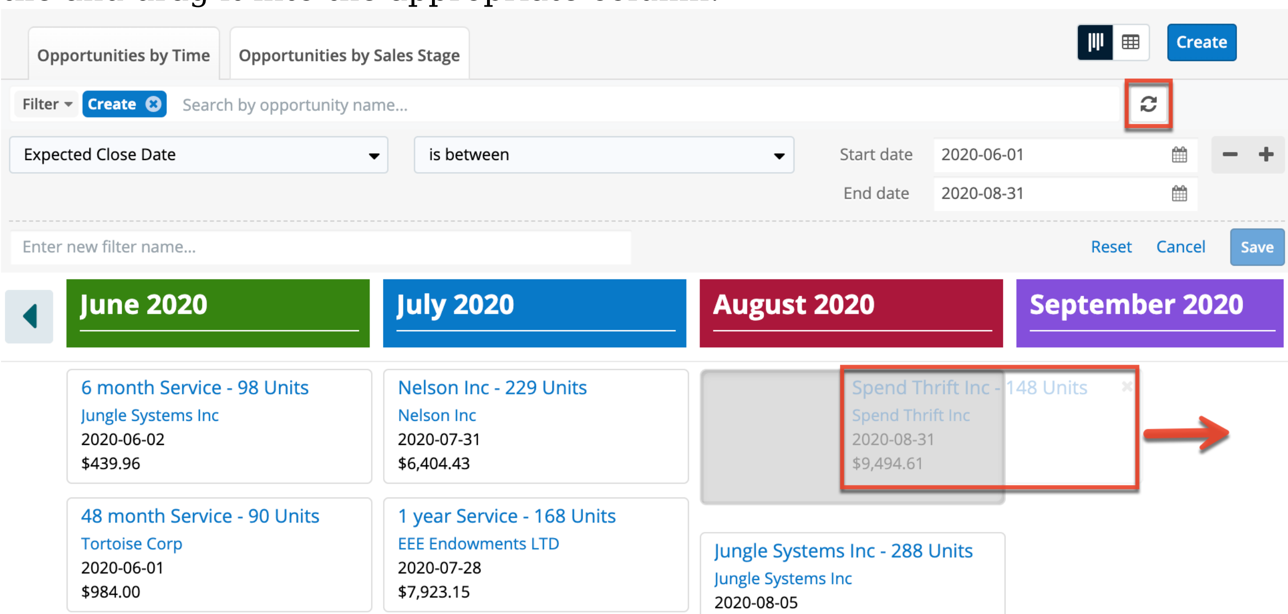
Tile view offers users an alternative way to view and interact with cases, tasks, leads, and opportunities. In the tile view, records will be grouped in vertical columns that represent the record stages or the group-by option configured by your administrator. For opportunity records, users can toggle between two group-by options because there is an always-on "Opportunities by Time" option. For more information on using tile view with opportunities, refer to the Opportunities documentation.

To further refine the tile view, users can filter the visible tiles by utilizing the standard Sugar filter options. Simply create or select a stock or saved custom filter (e.g., My Favorites, My Team's High-Value Opps) and the tile view display will update in real-time. If a filter (e.g., saved, ad-hoc) has already been applied to the module's list view (e.g., Opportunities), then that same filter will be automatically applied to the tile view and vice versa. Please note that the filter will continue to apply as you toggle between the tile view tabs, switch between the module's list view and tile view, navigate away from the module and then return again, or close your browser tab then return to the module again in a new tab. You can also use the search bar to refine the display by a keyword or phrase. For more information on using filters, refer to the List View Filters section of this page.



Note: The yellow highlighting in this image has been added for effect and will not appear in the application.

Click and drag a tile from one column to another to change its stage, status, or expected close date depending on the current layout. As an example, the following screenshot illustrates how to change the expected close date of an opportunity from a day in August 2020 to the last day of September 2020. Simply click on the tile and drag it into the appropriate column:



For opportunities with multiple revenue line items, the expected close date will change for all of the open related line items. For more information on using tile view with Revenue Line Items enabled, refer to the Opportunities documentation.

The tile view's filter Refresh button which appears to the right of the search box allows the user to quickly reapply filters after making changes to the displayed records without having to reload the browser. Simply click on the Refresh button to bring the tile view up-to-date with the most recent edits. In the image above, the tile view is filtered to only display records with expected close dates between June 2020 and August 2020, so once you drag the tile from "August 2020" to "September 2020" and click the Refresh button, the September 2020 column will no longer display any records.

Intelligence Pane

Intelligence panes display on list views, record views, and to the right of the Home page activity stream. They provide users with valuable record information via dashboards as well as showing previews of Sugar records.

Dashboards

Most intelligence panes have out-of-the-box default dashboards with a set of commonly used dashlets. Admin users may also have created default dashboards that are pushed to teams of users. In addition, individual users can create their own personal dashboards with whichever dashlets they wish to use. Any dashboard can also be shared with additional teams who can then pull the dashboard into their intelligence panes for use.

Please refer to the Dashboards and Dashlets documentation for in-depth documentation about using dashboards as well as information about commonly used dashlets.

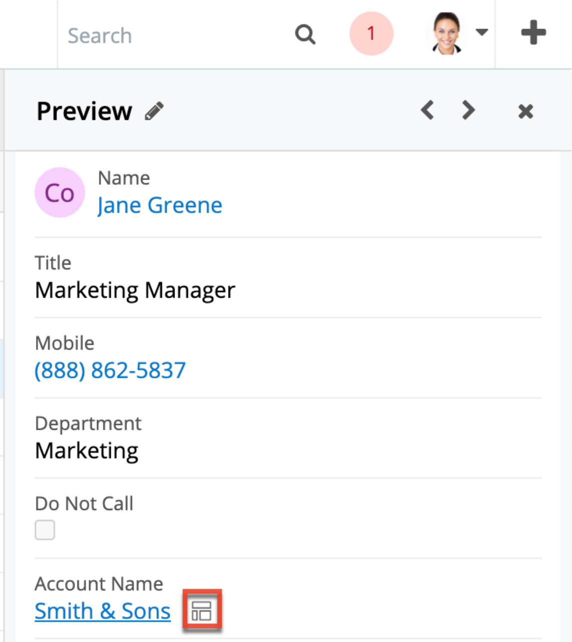
Previews

Users can preview a record's details by clicking the Preview button to the far right of a record's row or activity stream post. The preview appears in the intelligence pane to the right of the Home page's activity stream and on list views and record views. The preview displays the fields that have been configured by your Administrator in Studio > Layouts > Preview View and the record's most recent activity stream entries. For more information on editing preview layouts, please refer to the Studio documentation.

Viewing Previews

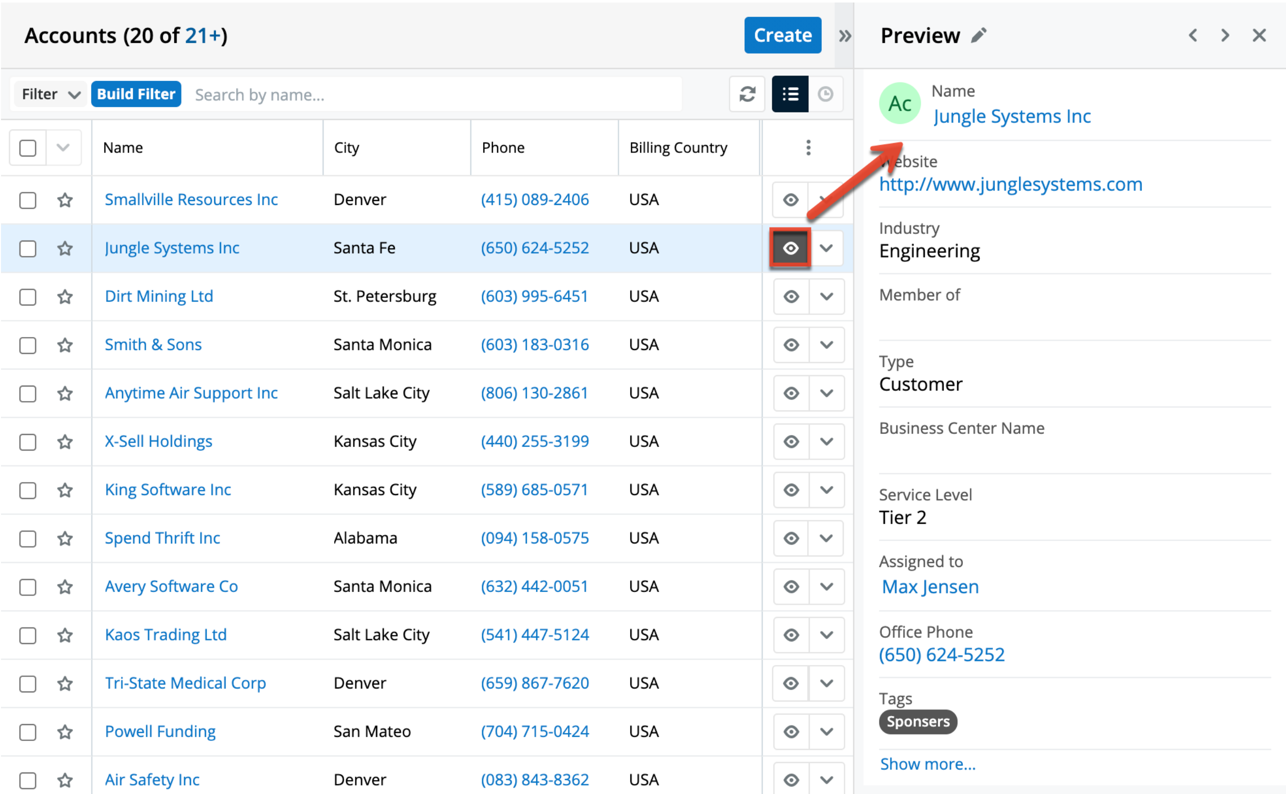
There are various options available for viewing previews in Sugar including via the list view, record view, and activity stream. Previewing allows users to easily view key information regarding a record directly from the intelligence pane without navigating away from the current page. Users can mark a record to follow or unfollow via the preview by clicking the Follow or Unfollow button within the record's details. Clicking the hyperlinks (e.g., account name, website, email address) within the preview allows you to access the record view, external company website, compose email, etc.

Note: Hovering over certain links to Sugar records (e.g., a linked account name) in the intelligence pane will display a Focus icon. Clicking the icon will reveal a Focus Drawer dashboard displaying a 360-degree view of the linked record through a set of dashlets. For more information on focus drawers, refer to the Focus Drawer section of this documentation.



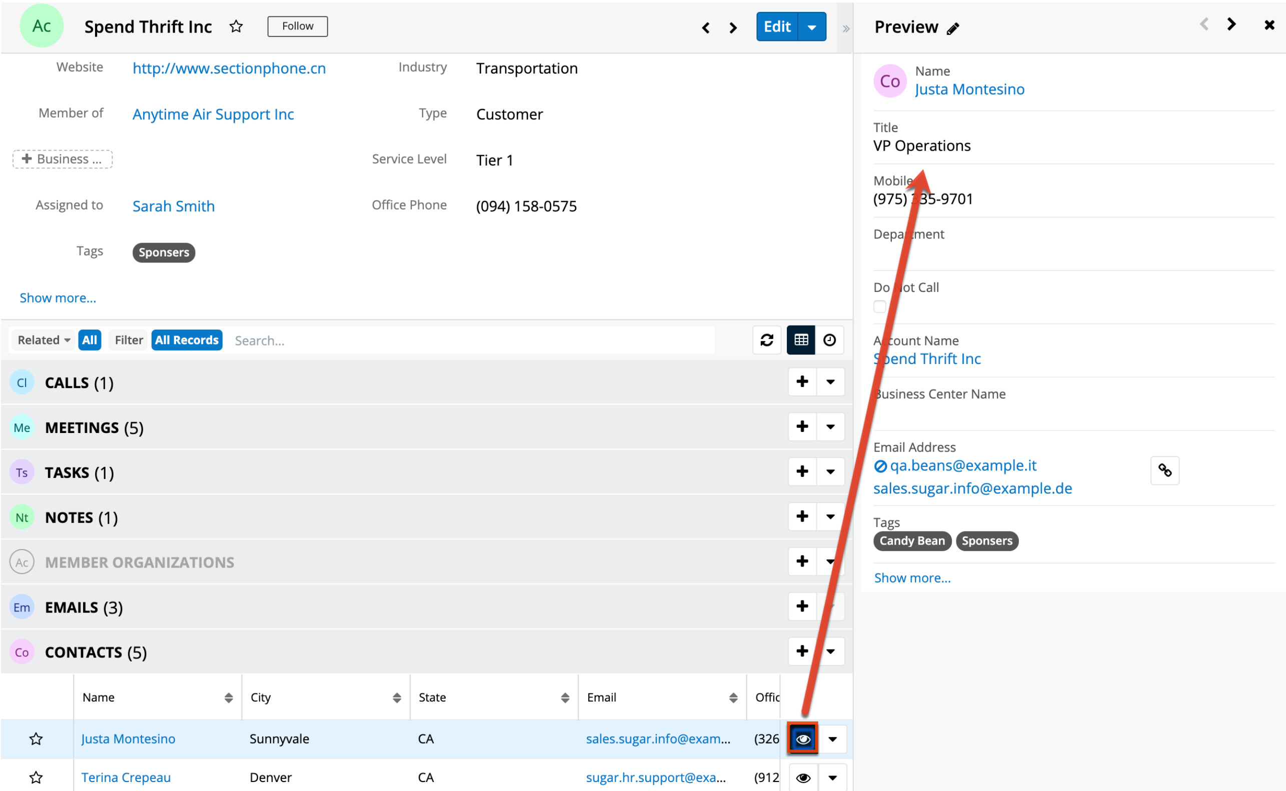
Previewing From List Views

Users can view a record's topmost fields directly from the module's list view by clicking the Preview button to the far right of each account's row. The intelligence pane will display the record's details with key information regarding the record as well as any related activity stream information.



Previewing From Record View

Users can also view a record's details from the module's record view by clicking the Preview button to the far right of each record row in the subpanel. The intelligence pane will display the record's details with key information regarding the record as well as any related activity stream information.

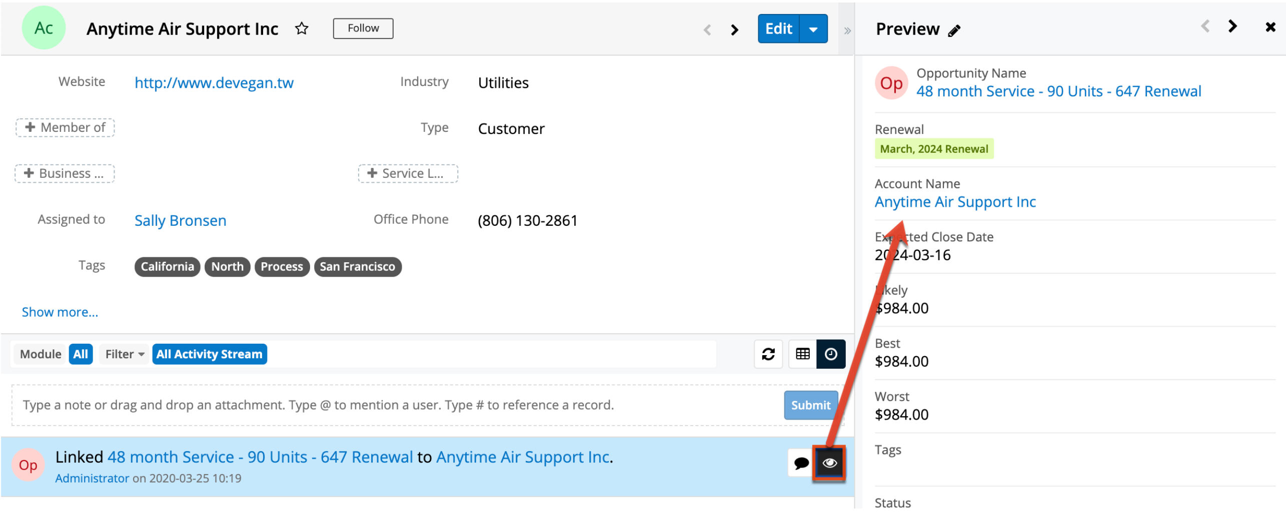


Previewing From Activity Streams

In addition, you can also preview the record referenced in activity stream posts from the Home page, list view, and record view activity stream by clicking the Preview button to the right of each post. Please note that preview is only available for Create, Update, Relate, and Un-relate-type posts in the activity stream. For more information about previewing activity stream posts, please refer to the Previewing Posts section of the Activity Streams documentation.

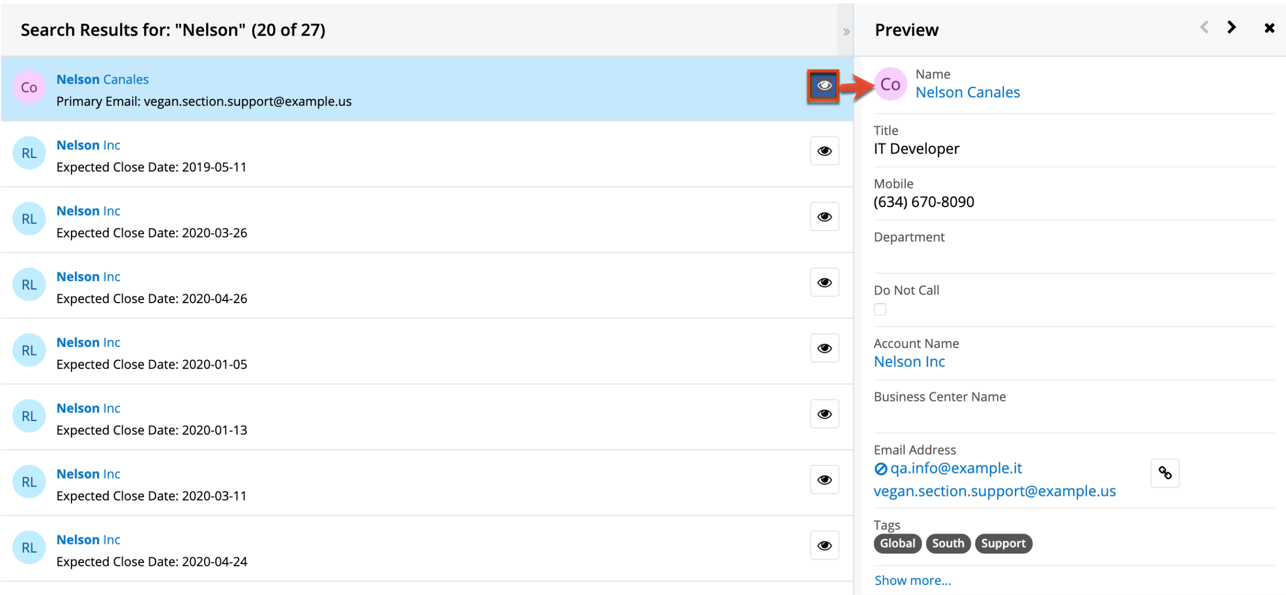
Note: Sugar's activity streams are disabled by default, but administrators can globally enable the functionality based on their organization's needs. For more information, refer to the System documentation in the Administration Guide.

The intelligence pane displays the topmost fields from the module's record view and the record's most recent activity stream entries.



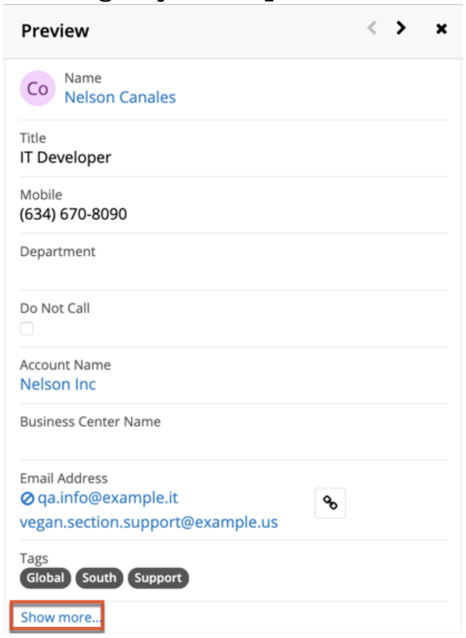
Previewing From Global Search

Users can view a record's details directly from the View All Results page for Global Search by clicking the Preview button to the far right of each record's row. The intelligence pane displays the topmost fields from the module's record view and the record's most recent activity stream entries. For more information on previewing via the View All Results page, please refer to the [Search](#) documentation.



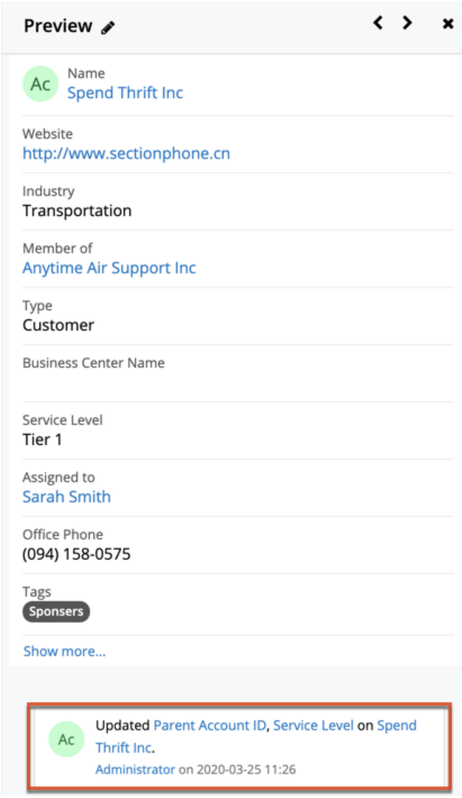
Show More

In the preview, Sugar displays the topmost fields from the module's record view. To view all of the fields that are on the record view, click "Show more...". Please note that administrators can configure what fields appear on the business card panel via Admin > Studio > Layouts > Record View. For more information on editing layouts, please refer to the Studio documentation.



Previewing a Record's Activity Stream

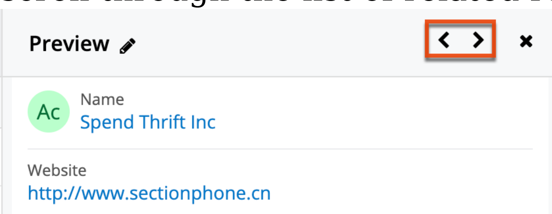
When previewing a record via the intelligence pane, you can also view any related activity stream posts which will appear below the record's detail. Please note that you cannot create new posts or comment on posts via the activity stream when previewing a record. For more information on creating posts and commenting on posts, please refer to the Activity Streams documentation.



Note: Sugar's activity streams are disabled by default, but administrators can globally enable the functionality based on their organization's needs. For more information, refer to the System documentation in the Administration Guide.

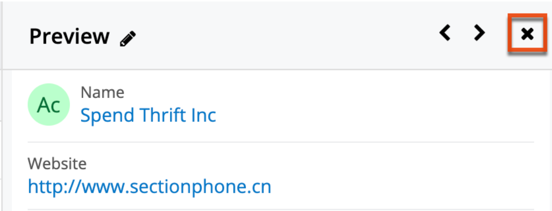
Previewing Next and Previous Records

Above a previewed record in the intelligence pane, there is a Left and Right arrow button that allows you to scroll through the previous and next records. Clicking the Left arrow button displays the previous record's preview while clicking the Right arrow button displays the next record's preview. When previewing from the module's list view, you can scroll through the list view's current search results. When previewing a related module record from a module's record view, you can scroll through the list of related records in the specific subpanel.



Closing a Preview

If you no longer wish to preview the records, you can simply close the preview by clicking the "X" on the upper right of the intelligence pane. Please note that the dashboard view will display again on the intelligence pane once you close the preview.



Focus Drawer

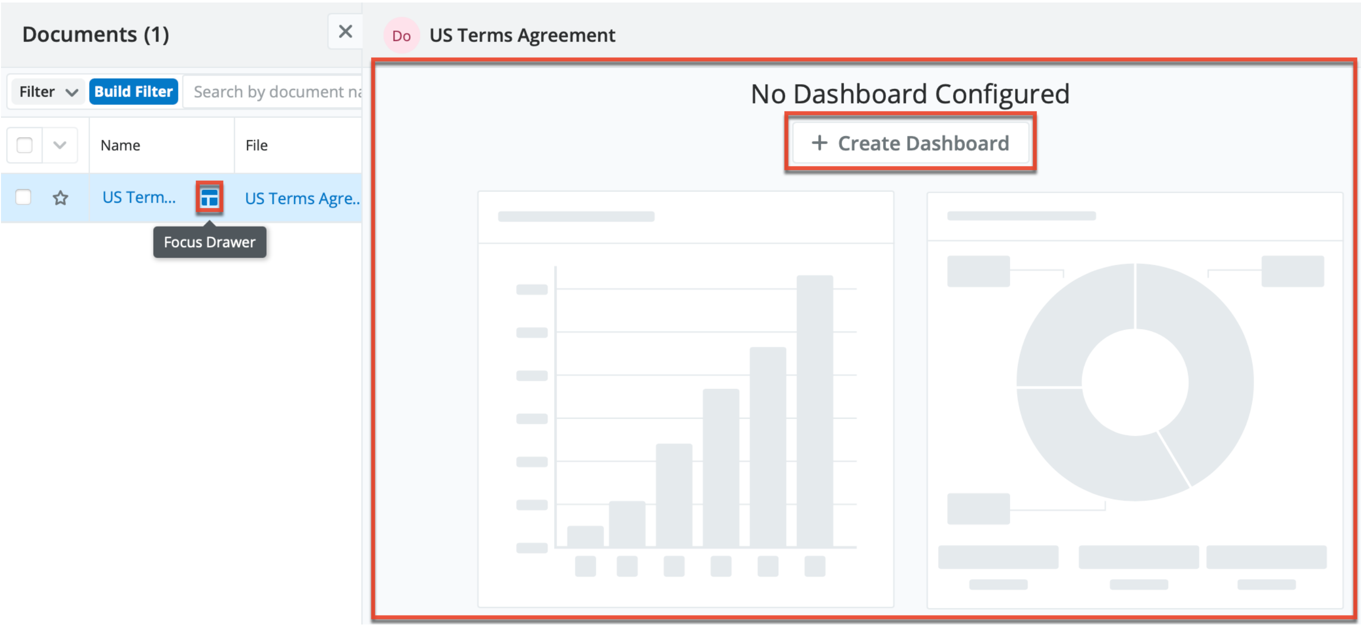
When hovering over most links to Sugar records (e.g., a linked account name, case subject, meeting subject, email subject) across Sidecar modules, a Focus icon will appear to the right of the link. Clicking the icon will open a Focus Drawer dashboard displaying a 360-degree view of the linked record through a set of dashlets containing relevant information such as the record's related records, related activities (e.g., calls, meetings), purchase history, and active subscriptions. Please note that the out-of-the-box default dashboard contains a set of pre-defined dashlets which can be configured by the dashboard owner and system admin users. For more information on out-of-the-box default dashboards, refer to the Dashboards and Dashlets documentation.

The Focus icon appears for links to Sugar records in the following views:

- List view and record view for supported Sidecar modules
- Record previews in intelligence panes
- Related record subpanels
- Supported dashlets (e.g., Active Tasks, History, Planned Activities, and Record View dashlets) on the Home page, List View, Record View, and Focus Drawer dashboards
- Renewals Console
- Service Console

If you do not belong to one of the designated teams for the linked module's Focus Drawer dashboard or if the linked Sidecar module record (e.g., Documents) does not have a stock Focus Drawer dashboard defined, you can create a new one by opening the focus drawer and clicking the "+ Create Dashboard" button.

Please note that the Focus icon will not appear if you are restricted from accessing the particular module linked to the Focus Drawer dashboard based on your assigned role and/or team permissions. For more information on managing dashboards, refer to the Dashboards and Dashlets documentation.



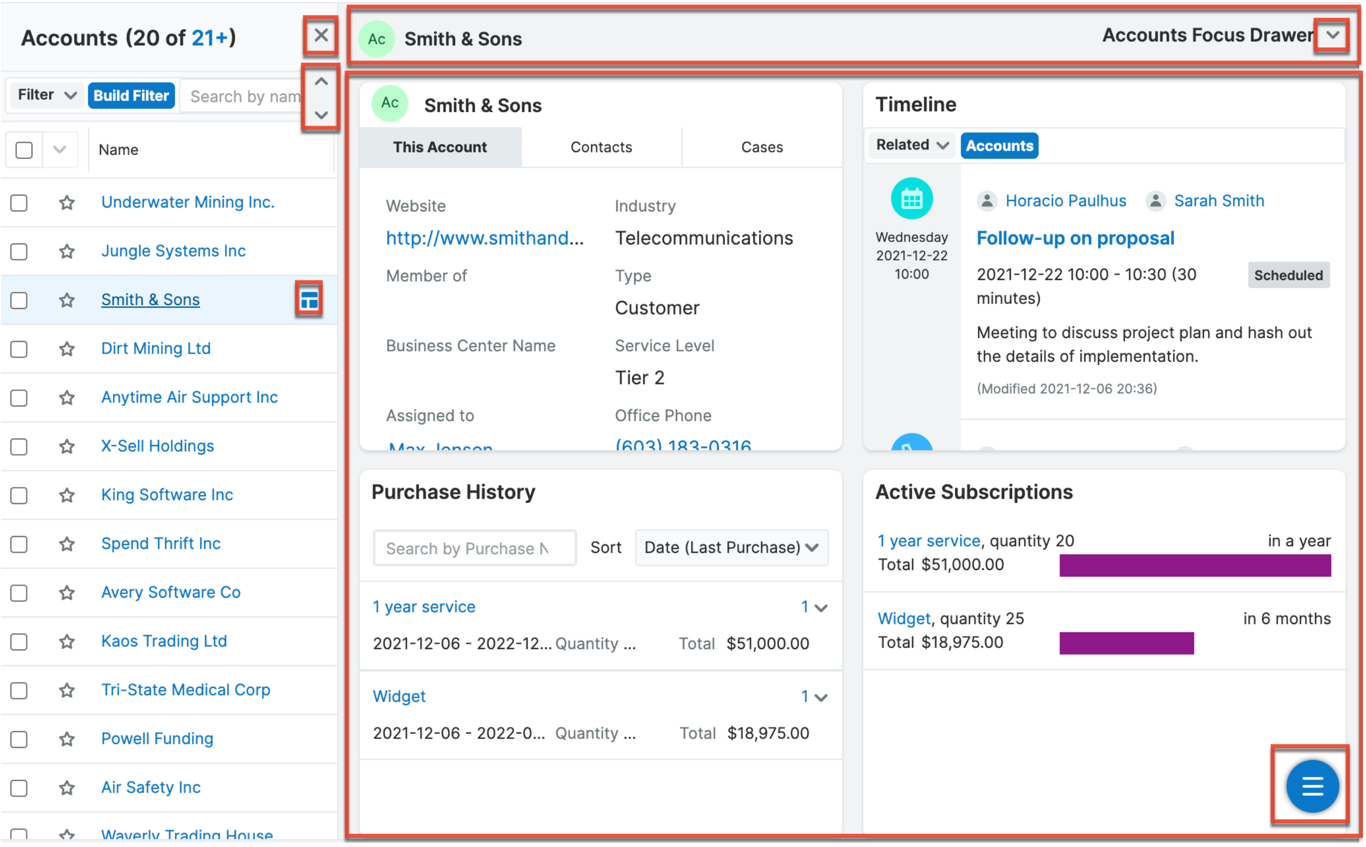
Using Focus Drawers

When you click the Focus icon for a linked record (e.g., Smith & Sons), the focus drawer will open and the header will display a breadcrumb with the module icon and record name as well as the current dashboard's name (e.g., Accounts Focus Drawer) to the far right of the header. Dashboard owners can rename the dashboard if desired by clicking the dashboard's name or hovering over the name and clicking the pencil icon.

Note: To close a focus drawer, simply click the X icon at the top left of the drawer or press your Escape (Esc) key.

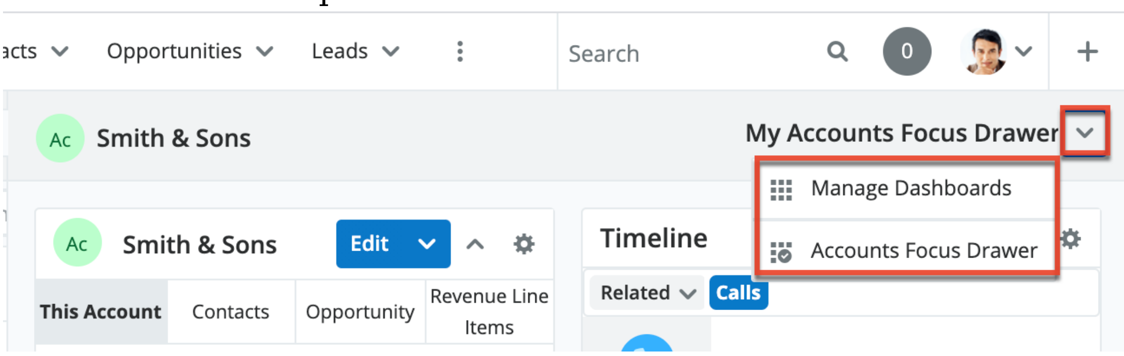
The Focus Drawer dashboard appears beneath the header and contains the dashlets which allow users to view and obtain pertinent information related to the record without having to navigate away from the current view. Please note that the dashlets displayed in the dashboard will vary between each Sidecar module's focus drawer dashboard. Some common dashlets that can appear in the dashboard are: Record View dashlet, Timeline dashlet, Active Subscriptions dashlet, Purchase History dashlet, and Comment Log dashlet. For more information on other commonly used dashlets, refer to the Dashboards and Dashlets documentation. Only the dashboard owner and system admin users have the ability to edit the dashlets, delete the dashlets, add additional dashlets, and rearrange the dashlets within the dashboard.

While the focus drawer is open, you can click the up or down arrow to the left of the drawer to quickly switch the header and contents of the drawer and view details related to the next or previous record in a list view. The up and down arrow will only be active when the initial focus drawer is opened from a list such as a module's list view, related record subpanel, list view dashlet, etc.



You can also create a new Focus Drawer dashboard. Simply click the [floating actions button] on the current dashboard and select the Create Dashboard option or duplicate the current dashboard and personalize it as desired. The new Focus Drawer dashboard will automatically appear in the current view, but you can easily [switch] between the custom and default dashboard(s) by clicking the triangle next to the current dashboard's name (e.g., My Accounts Focus Drawer) on the Focus Drawer header.

You can also view and manage the dashboard records from the Dashboards list view by clicking the [Manage Dashboards] option from the dashboard selection list. Please keep in mind that the last-viewed dashboard will appear in the focus drawer the next time it is opened for the linked module.



Note: Focus Drawer dashboards can only be deleted by the dashboard owner and system admin users.

Drilling Through Focus Drawers

When viewing a Focus Drawer dashboard, you can click on even more Focus icons to drill into records related to the original one. You can continue drilling this way through multiple layers of focus drawers. Each time you click a Focus icon from within the dashboard, a new breadcrumb will get added to the breadcrumbs list in the Focus Drawer header to give you a clear picture of where you are at in the drillthrough. To navigate backward, click the breadcrumb containing the record's name that you wish to go back to.

Keep in mind the following behavior when drilling through multiple focus drawers:

- The first and current breadcrumbs are always shown in the Focus Drawer header regardless of how many intermediate breadcrumbs there are.
- When there are more breadcrumbs than can fit in the header, the intermediate breadcrumbs will collapse into a three-dots overflow menu, which you can click to reveal the list of hidden breadcrumbs.
- Clicking on a previous record's breadcrumb will replace the focus drawer content with that record's dashboard content and all breadcrumbs to the right of the clicked breadcrumb will be removed from the Focus Drawer header.

Note: If you click the Focus icon for a linked record during drillthrough and there is no Focus Drawer dashboard configured for the record's module, the breadcrumb will show with the module icon and record name, but the dashboard's name will be blank until the dashboard is created.

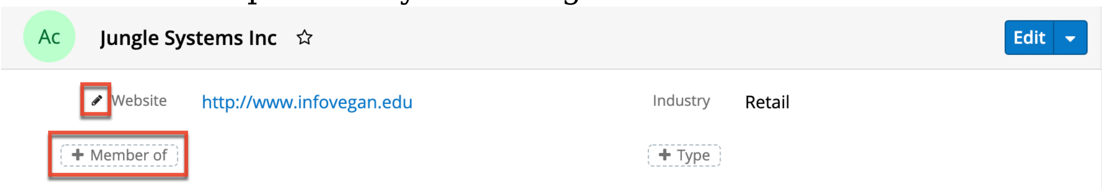
Editing Records

Records may be edited at any time to modify or add information. Edits can be made via record view or list view as detailed below. For instructions on how to edit the various field types, please refer to the Field Types section.

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

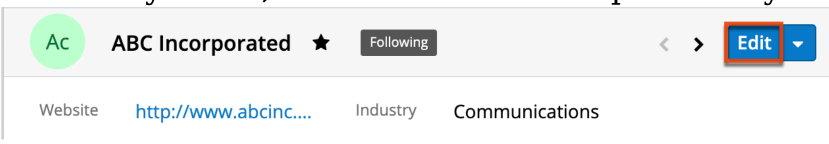
Editing Inline via Record View

Users can edit individual fields in record view without entering the full edit mode by clicking the field name or value. If a field that supports inline editing is not empty, a pencil icon appears when you hover over it. If the field is empty, the field's label is displayed as a clickable pill with a plus icon next to it. You can click on the pencil or pill to begin editing the field. After entering your desired values, click "Save" to preserve your changes to one or several fields.



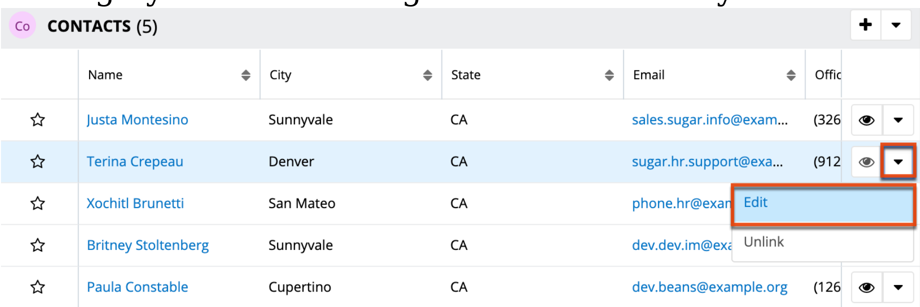
Editing via Record View

You can edit many fields at once via the record view by clicking the Edit button on the upper right of the page. Once the record view layout is editable, update the necessary fields, then click "Save" to preserve your changes.



Editing Inline via Subpanels

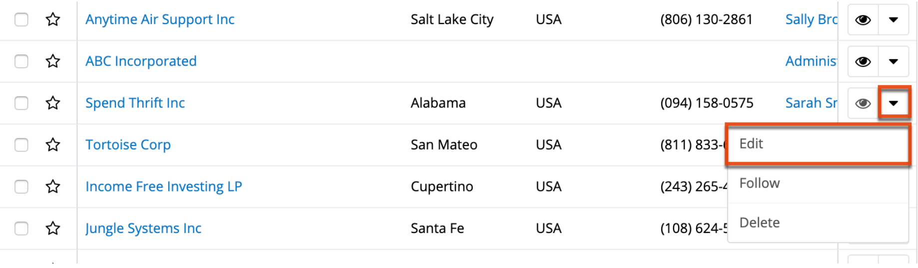
Beneath the record's fields are subpanels containing related records from various modules. You can edit individual fields (e.g., Email, Office Phone) for records directly within the subpanel without entering the full edit mode. Simply click the Actions menu to the far right of the record's row and select "Edit" or double-click on the row to open the inline editing mode. You can activate multiple rows for editing by double-clicking on each row that you want to edit.



The fields on the record's row will become editable and allow users to type or select a new value. You can click the double arrow icon on the upper right of the page to expand the subpanel list view's width to make editing easier. Click "Save" on the right side of the row to preserve your changes, or click "Cancel" on the left side of the row to close editing mode without saving.

Editing Inline via List View

You can also edit individual fields on a module's list view without entering the full edit mode. Click the Record Actions menu to the far right of the record's row and select "Edit" or double-click on the row to open the inline editing mode. You can activate multiple rows for editing by double-clicking on each row that you want to edit.



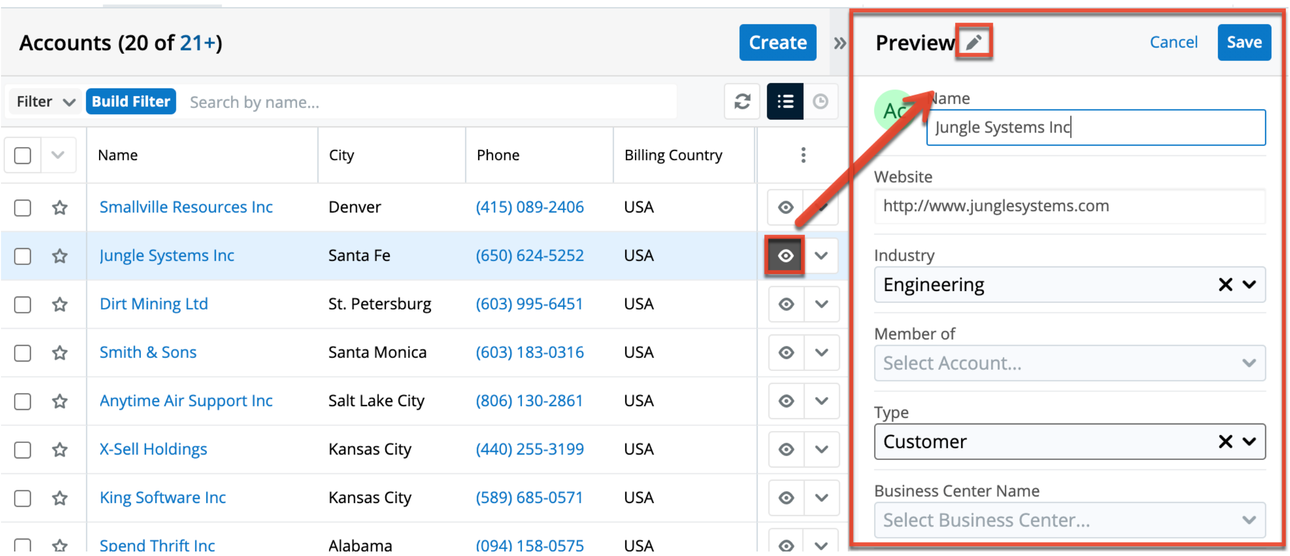
The fields on the record's row will become editable and allow users to type or select a new value. You can click the double arrow icon on the upper right of the page to expand the list view's width to make editing easier. Click "Save" on the right side of the row to preserve your changes or click "Cancel" on the left side of the row to close editing mode without saving. After saving, please refresh the page to have any list view filters be applied to the new record's values.

Note: Text area fields are not inline-editable from list views.

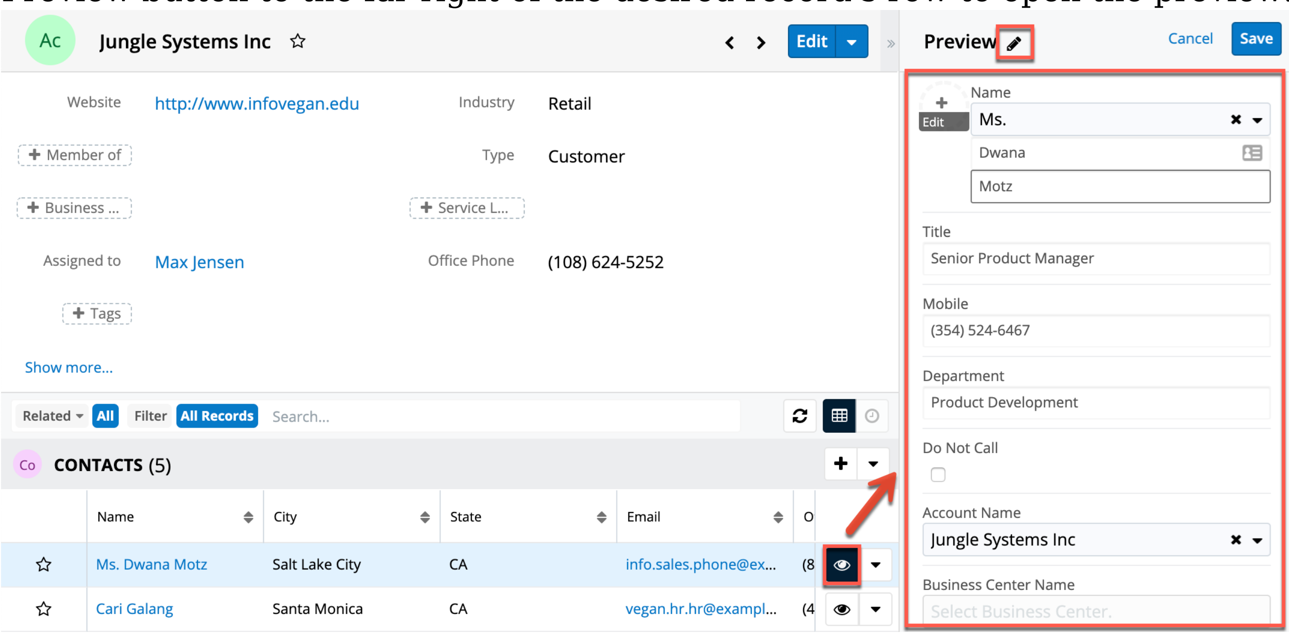
Editing via Preview

Users have the option to edit fields directly in a record's preview when previewing from the module's list view or related-record subpanel. Please note that the preview edit feature is enabled by default, but administrators can disable this feature via Admin > System Settings based on their organization's needs.

To edit a record via the list view preview, navigate to a module's list view and click the Preview button to the far right of a record's row in order to open the preview.



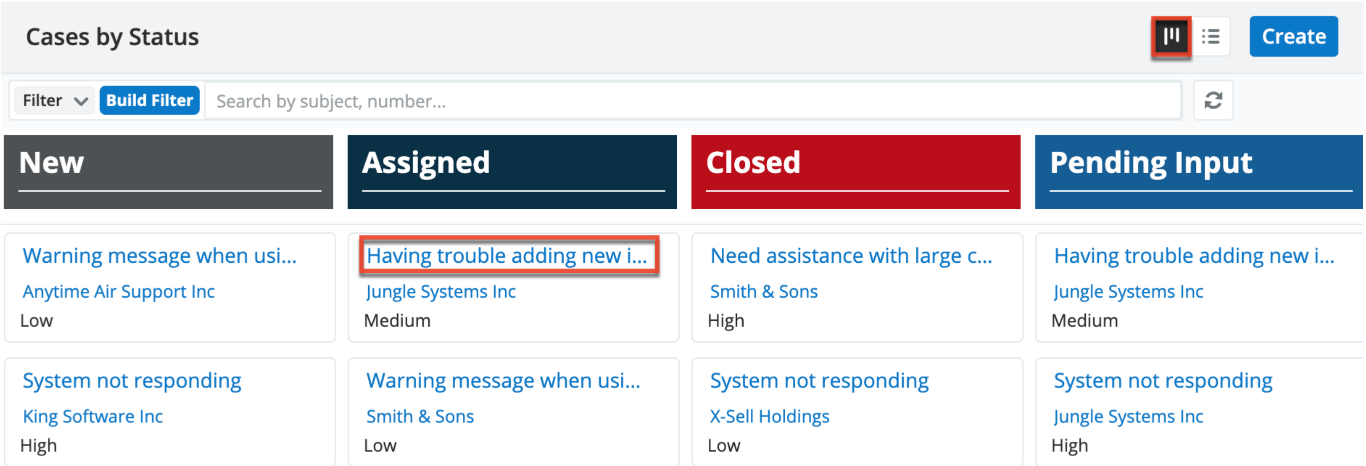
To edit a record via the subpanel preview, navigate to a module's record view, scroll down to the subpanel area beneath the record's details, and click the Preview button to the far right of the desired record's row to open the preview.



To edit the record's fields, simply click the pencil icon in the Preview header. The fields on the record's preview will become editable and allow you to type or select a new value. Click "Save" to preserve your changes.

Editing via Tile View

For the Cases, Tasks, Leads, and Opportunities modules, a unique tile view is available that displays records in an intuitive drag-and-drop interface. Users have the option to edit any records displayed in the tile view by dragging and dropping tiles among columns or by clicking the record's name/subject link within the tile. Clicking the tile will open the record view layout where you can update the necessary fields then click "Save" to preserve the changes. For more information on how to use tile view, refer to the Tile View section of this page.



Mass Editing via List View

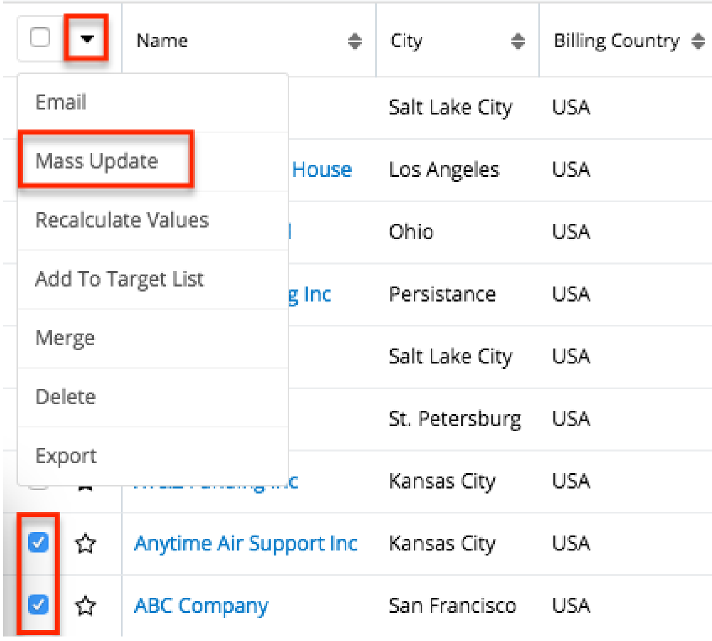
Mass Updating allows you to apply the same changes to multiple records at once. Administrator users or users with developer-type role access can control which fields are available during mass update via Admin > Studio. Fields with the following data types can be made available for mass updating:

- Checkbox
- Date
- Datetime
- Decimal
- Dropdown
- Encrypt
- Float
- Iframe
- Integer
- Multiselect
- Phone
- Radio
- Relate
- Text
- URL

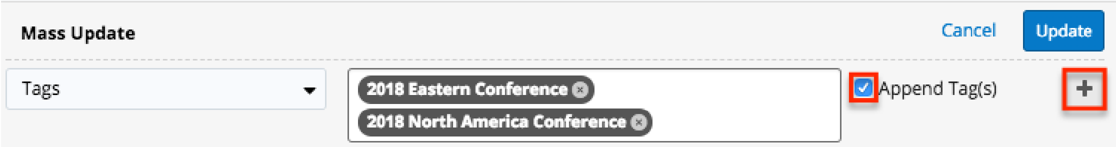
For more information on configuring the mass update fields, please refer to the Studio documentation. After using list view search to locate the desired records, you can choose individual records or use the Select All option to modify all of the current results. Using the Select All option will allow you to update up to 1000 records at a time. If you wish to update more than 1000 records or update a specific group of records from the list view, use filters to perform the updates 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. Check with your system administrator if you do not see the Mass Update option.

The following steps cover mass updating account records as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the list view's list view search to identify accounts you wish to modify.
3. Select the desired accounts then choose "Mass Update" from the Actions menu.


4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter. The following options may be available in the Mass Update panel:
    - **Add Row/Remove Row**: To mass update several fields at once, click the Add button to the right of the row.
    - **Append {Field}(s)**: When mass updating a field that may contain multiple values (e.g., Tags, Teams), Sugar will display a checkbox labeled "Append {field}(s)", where {field} is the name of the field you have selected. This option is enabled by default to prevent loss of data by adding the new values to any existing data in the updated field. Disable the checkbox if you prefer to overwrite any existing data in the updated field.



- These additional options appear when mass updating the Teams field:
  - **Set as Primary Team**: Use the star icons to specify which team, if any, should be set as the primary team on the updated records. A primary designation is required when the Append Team(s) option is disabled.
  - **Add Team/Remove Team**: Specify multiple teams by using the Add and Remove buttons adjacent to the Team selection field.

5. Click "Update" to save the changes to all of the selected account records.

Note: If your administrator has enabled team-based permissions, you may also see a Lock button or a "Selected" box on the Teams field. Please refer to the Using Team-Based Permissions section for more information.

Deleting Records

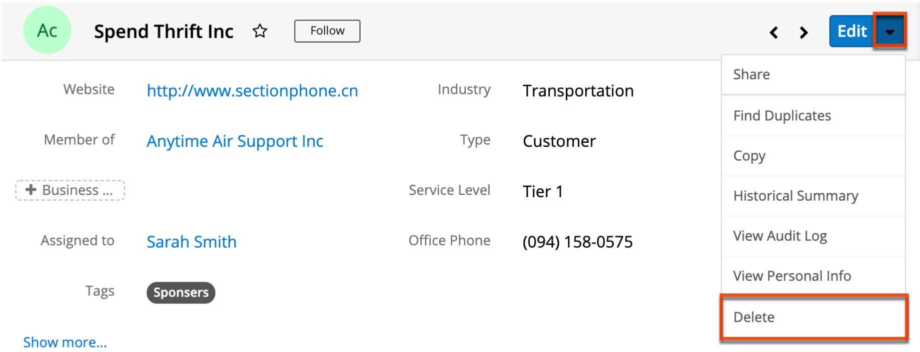
If a record is invalid or should no longer appear in your organization's instance, it may be deleted from either the record view or list view. Deleting via the record view allows you to delete the current record while the list view allows for deleting one or more records at a time. Deleting a record will not delete its 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 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 Delete options.

Deleting via Record View

The following steps cover deleting an account via record view as an example:

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

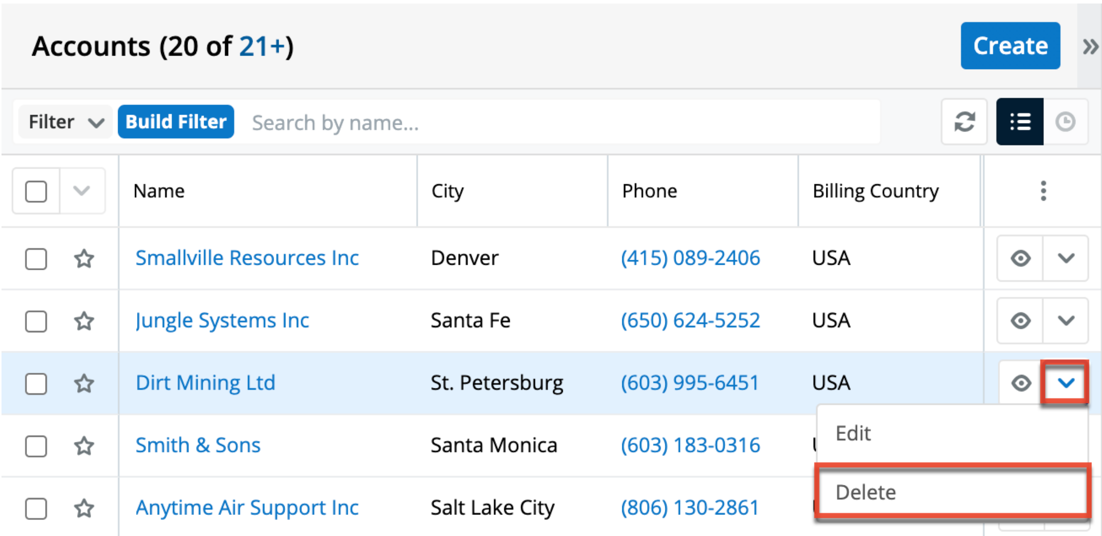


3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

Deleting via List View

The following steps cover deleting an account via list view as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the [List View Search](#) to find the Account record you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete".



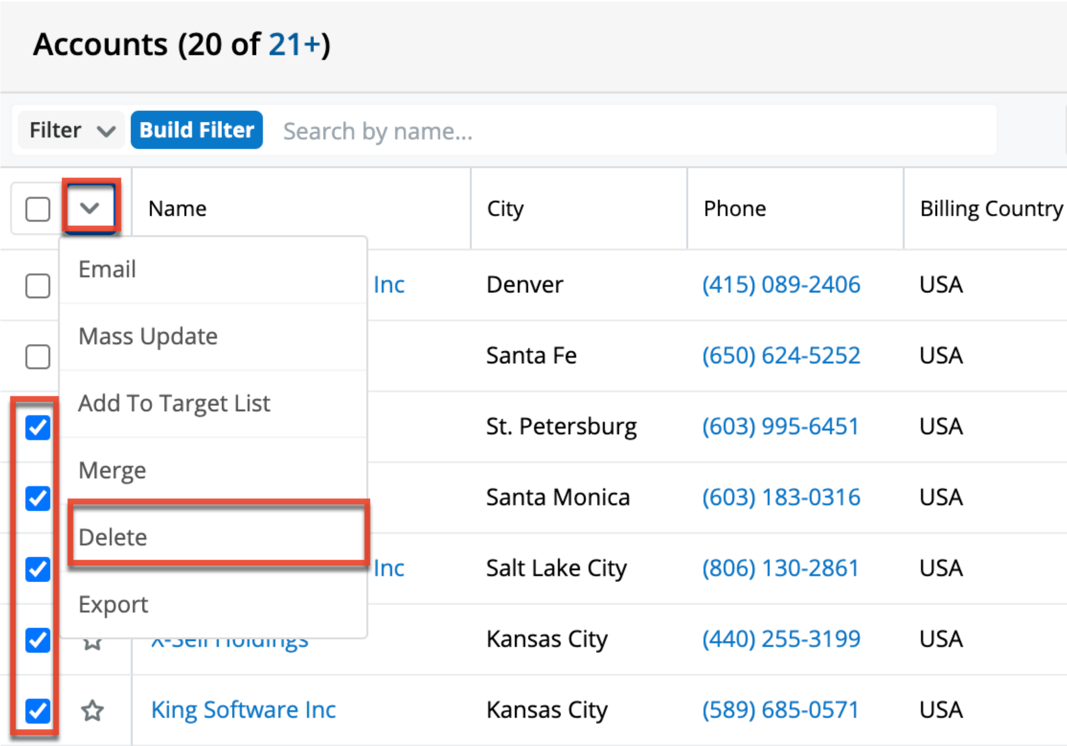
4. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

Mass Deleting via List View

The following steps cover deleting one or more account records via the list view as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the [List View Search](#) to find the Account records you wish to delete.

3. Select the desired account records then choose "Delete" from the Actions menu.



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

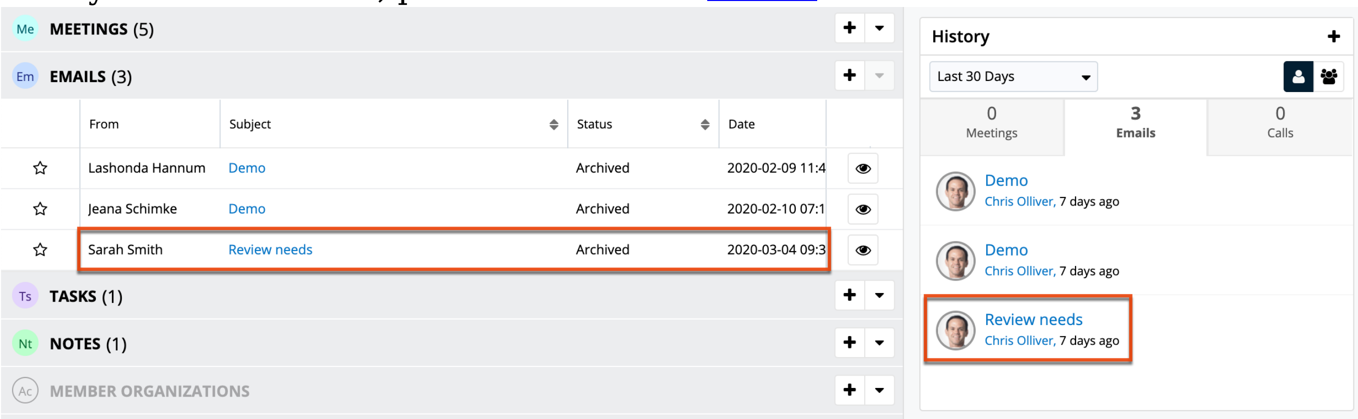
You can also use the Select All feature in the list view, which will allow you to easily select the first 1000 records in the result set. If you wish to delete more than 1000 records or delete a specific group of records on the list view, please use the filter option in list view search to perform the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

Emailing Records

Sugar allows users to compose and send outbound emails to records that include an Email Address field such as accounts, contacts, leads, and targets as well as any custom person- or company-type modules which include an email address field. The sections below cover the various ways to send emails to records. Accounts, contacts, leads, and targets may also be emailed via campaigns; more information about emailing these records via campaigns can be found on the respective product guide pages.

Note: Before users can send email messages from Sugar, please complete the required configurations described in the Emails documentation. The logged-in user must have at least one outgoing email account successfully configured in the Emails module.

Once an email is successfully sent by a method other than workflows or campaigns, the email record will appear in the History dashlet and Emails subpanel on the record's record view. For more information on sending emails from your own account, please refer to the [Emails](#) documentation.

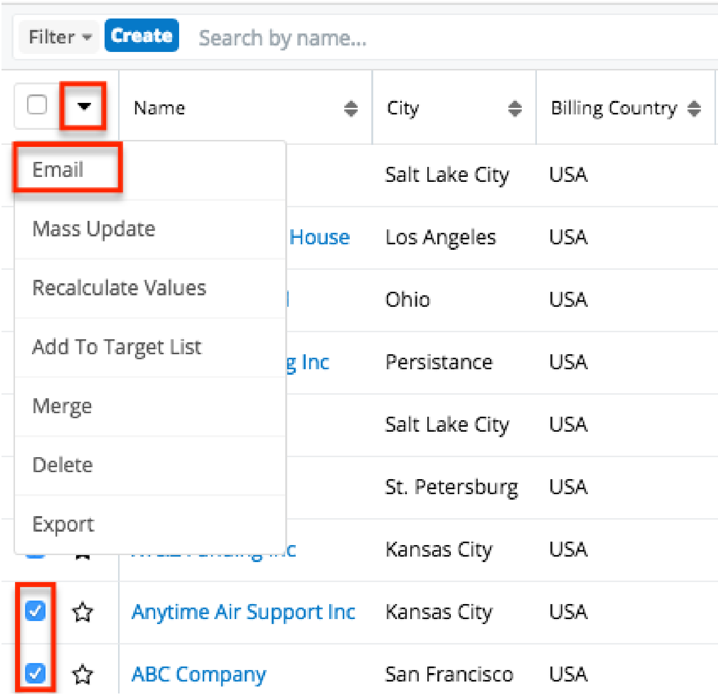


Emailing via List View

For modules that include an Email field, the Email option in the list view's mass actions menu enables users to send an email message 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 Mass Actions menu. The Compose Email window will open allowing you to enter all relevant information (e.g., subject, body). Please note that the email will be sent to the selected record's primary email address on file.

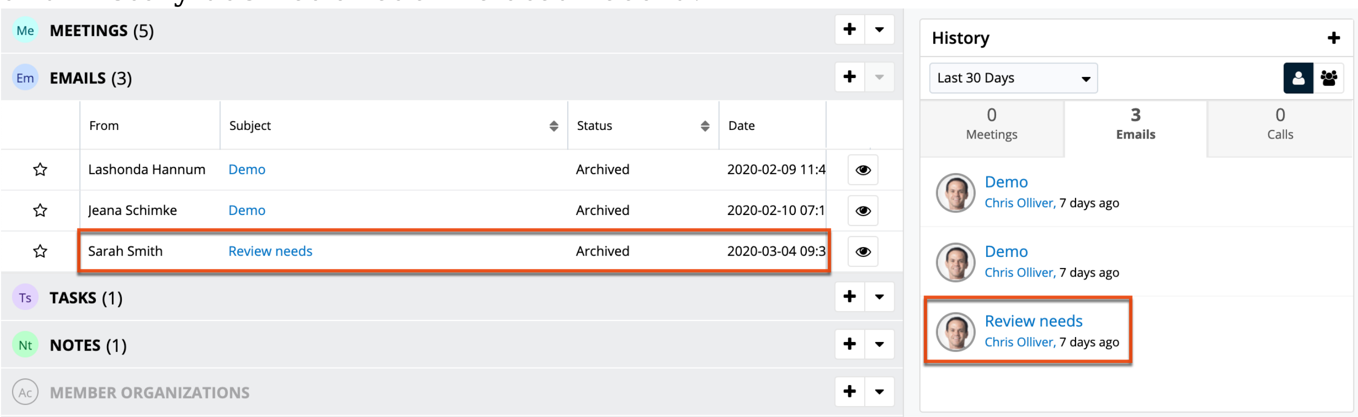
The following steps cover composing and sending an email from the Accounts list view as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Find and select the accounts in the list view that you would like to send an email to.
3. Choose "Email" from the Mass Actions menu.



4. In the Compose Email window, enter the subject and body of the email message, edit the recipient fields (optional), then click "Send".

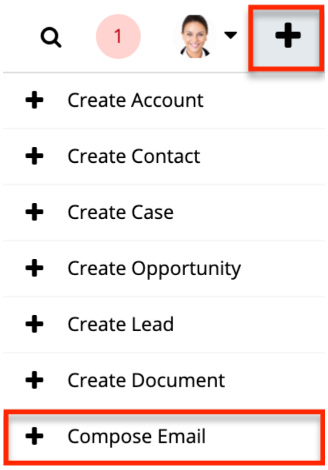
After sending the message, the email record will appear in the Emails subpanel and History dashlet of each related record.



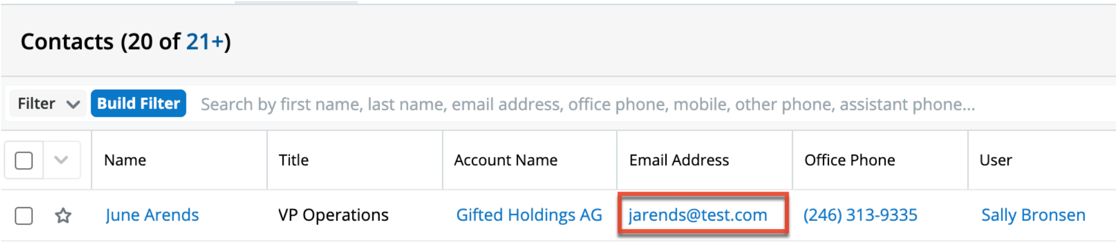
Emailing via Quick Create

Quick Create provides an easy way to send an email from Sugar to the recipient associated with the record you are viewing. Quick Create for email messages can be accessed from the Quick Create menu on the navigation bar, from any Emails subpanel, or by clicking on a linked email address in Sugar list views or record views.

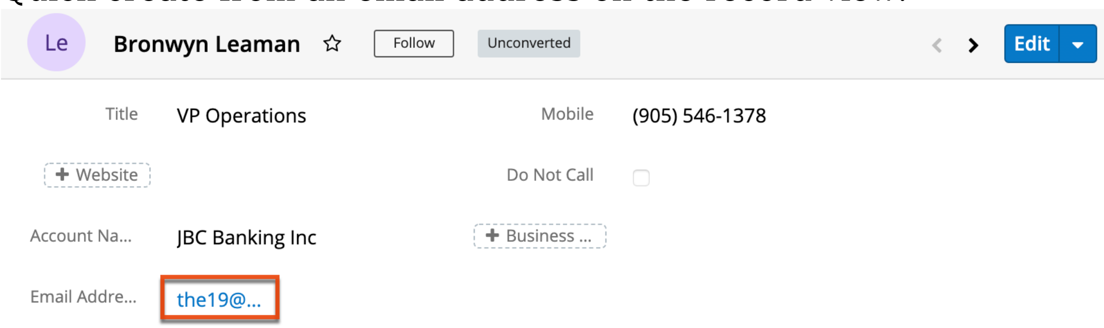
- **Quick creating via Quick Create menu**: Use "Compose Email" in the Quick Create menu to relate a message to the record you are currently viewing and automatically populate the message's "To" field with the record's name and primary email address. If you use the Compose Email quick-create option from any other page, simply insert the desired recipient(s) manually as explained in the [Working With Recipient Fields](#) section of the Emails documentation.



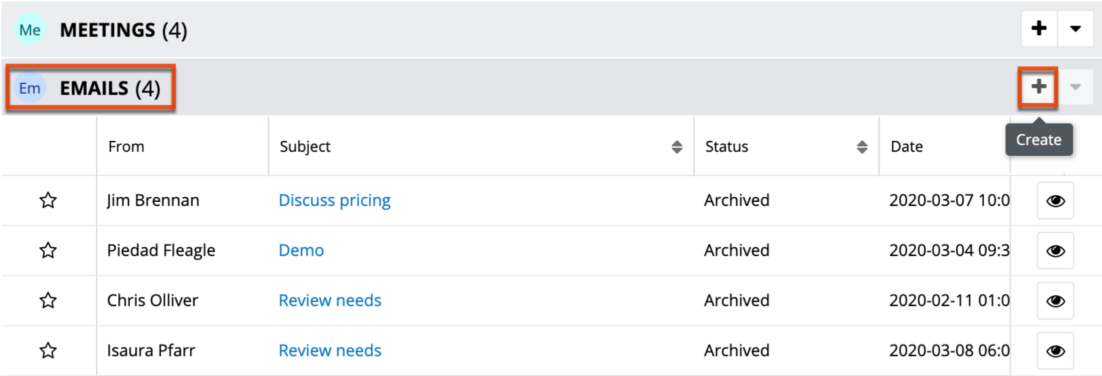
- **Quick creating via email address**: The Quick Create view will also open if you click on a hyperlinked email address inside the Sugar application. For example, email addresses displayed in list views, dashlets, intelligence panes, and record views can be clicked to expose the Quick Create email compose view pre-filled with the clicked email address.
    - Quick create from an email address in list view:



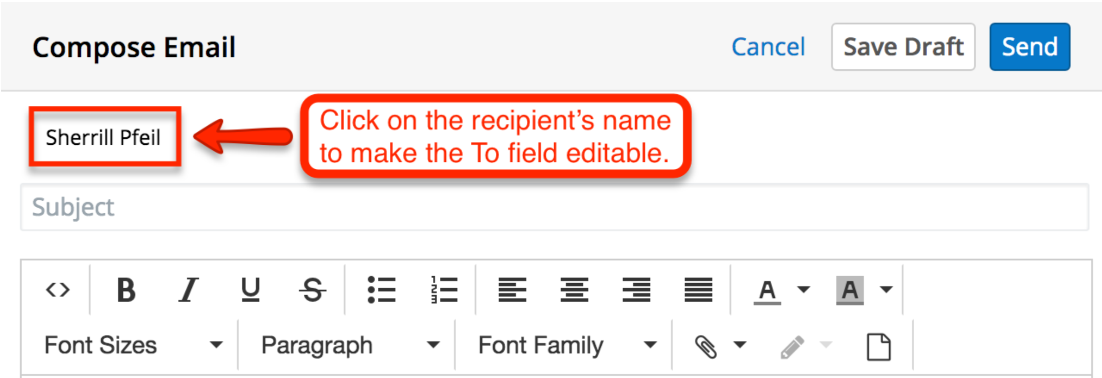
    - Quick create from an email address on the record view:



- **Quick creating via Emails subpanel**: Click the Create (+) button on the Emails subpanel to compose an email to the record's primary email address and automatically relate the message to the record you are viewing.
Note: Legacy modules contain an Activities subpanel instead of an Emails subpanel.



To edit or override a default email recipient on Quick Create, click on the name above the Subject field and the area will transform into the standard From/To/Cc/Bcc form.



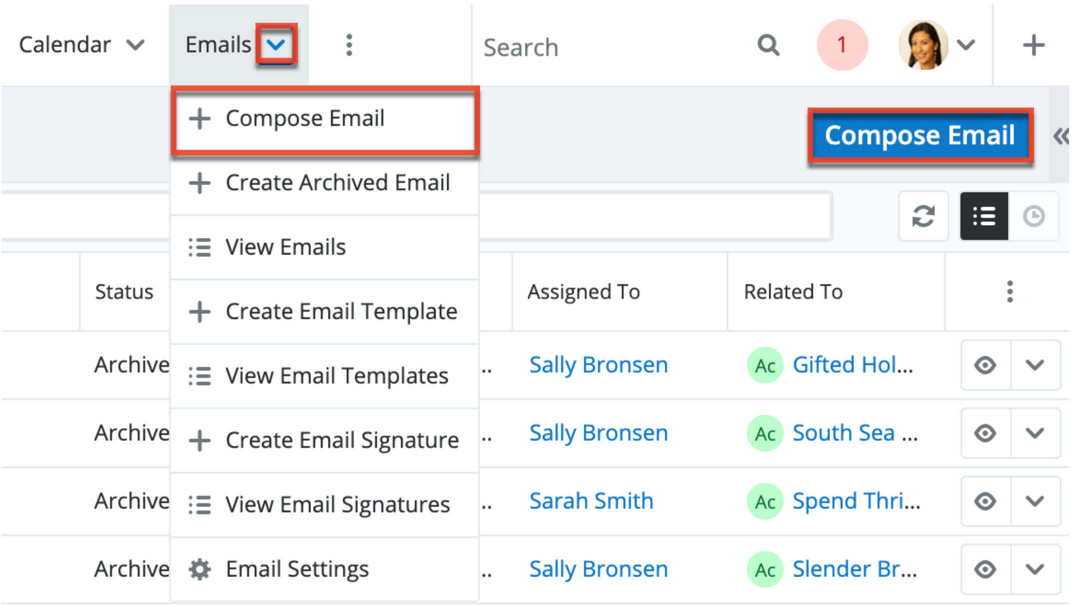
For more information on editing recipients, please refer to the [Working With Recipient Fields]() section of the Emails documentation.

Emailing via the Emails Module

Users can compose and send messages directly from the Emails module by clicking the Compose Email button on the Emails list view or by selecting "Compose Email" on the Emails module tab menu. This opens up the compose layout, which allows you to enter all of the relevant information for the email.

Use the following steps to compose an email via the Emails module:

1. Click "Compose Email" on the Emails module list view or the Emails module tab menu:



2. Enter appropriate values for the fields in the layout. All required fields are marked as such and must be completed prior to saving.
3. Once the necessary information is entered, click "Send" to deliver the message to the recipients specified in the To, CC, and BCC fields. Alternatively, click "Save Draft" to navigate away from a message without sending it. Email records in a draft state are only visible to the email's assigned user and the administrator.

For more detailed information about sending email messages, please refer to the Emails documentation.

Emailing via SugarBPM

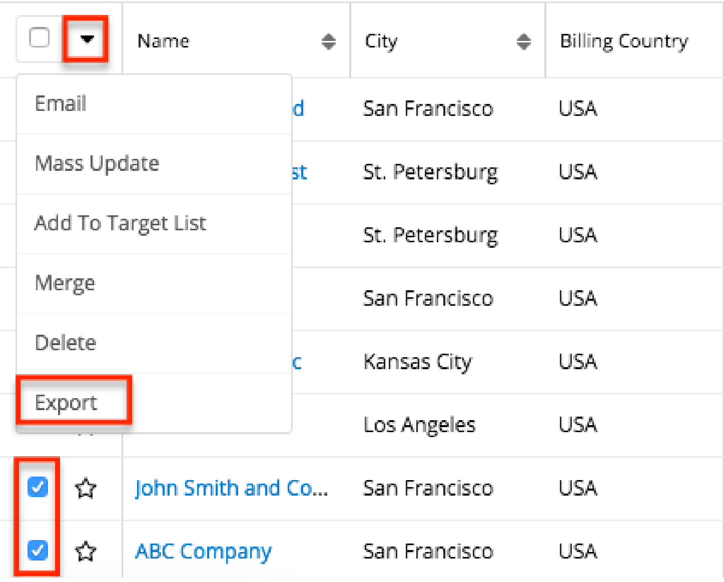
SugarBPM is available to administrators and users with developer-type role access. Process definitions created in SugarBPM may contain Send Message events that include the ability to send emails to Sugar records that have an email address. Send Message events utilize templates created in the Process Email Templates module. Templates may include relevant data pulled from the record as well as your organization's design and branding. For more information, please refer to the Process Email Templates documentation.

Exporting Records

Exporting downloads all fields for the selected records to your computer as a CSV (comma-separated values) file. This may be useful when needing to use Sugar 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 module's list view by first locating and selecting the checkboxes of the desired record. Then, select "Export" from the Mass Actions menu. You can also export Rows and Columns-type reports if you wish to employ more complex filter criteria and have greater control over which fields will be included. For more information on exporting records, 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, please refer to the Role Management documentation. Check with your system administrator if you do not see the Export option.

Using Team-Based Permissions

In Sugar, teams are typically used to control which groups of users can access a record. Using team-based permissions, however, an administrator may choose to extend the purpose of teams to control who can perform certain operations on the record (e.g., edit, delete). When enabled, regular users can use a record's Teams field to grant access such as viewing, editing, exporting, importing, and deleting permission to specific users or user groups.

An administrator must first enable team-based permissions and configure roles and users for this feature. For more information, please refer to the Role Management documentation. Once the roles are applied to users, any user who can edit the

Teams field in the enabled module can grant extra access to teams of users.

If you are not an administrator and you are not sure if team-based permissions are enabled for a module, simply navigate to a record view, click "Edit", and look for a lock button next to the Teams field:

If you do not see a lock button, reach out to your system's administrator to discuss whether team-based permissions are appropriate for your organization's business needs.

Note: Legacy interface modules also support team-based permissions but use a checkbox labeled "Selected" next to the Teams field to indicate whether or not the team's members have extra access to the record.

Team-based permissions have no effect on users who have not been assigned to roles that are configured with "Owner & Selected Teams" access. For more information, please refer to the Record Operation Definitions section. For information on using team-based permissions on a record, please refer to the Role Management documentation.

To grant extra access to a record for all members of a team who have role permission, click the lock button next to the team's name. This will enable additional permissions according to the guidelines in the table below. To control an individual user's access to a record, add that user's private team to the record's Teams field and then enable or disable additional permissions according to the guidelines in the table below. Please note that extra access will only be granted to users who have a role that restricts their access to "Owner & Selected Teams" as described in the Role Management documentation.

Team Setting	**Appearance**	Button	**Description**
Additional Permissions Enabled	A black button with an open lock		Members of this team have extra access to this record or fields within the record as controlled by their roles
Additional Permissions Disabled	A white button with a closed lock		Members of this team have no additional team-

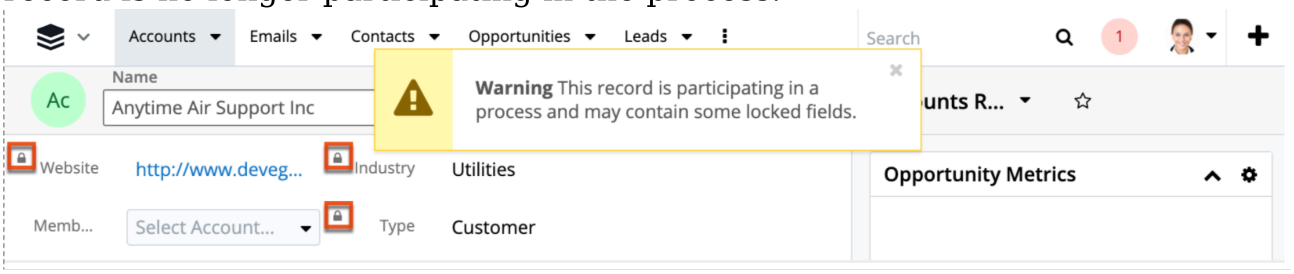
			based permissions as controlled by their roles

In the following example, members of team East have standard team access to the record (at a minimum, view permission), while Jim and members of team West have view permission plus extra access to do things such as working with restricted fields, and editing, deleting, and exporting the record. Note that a user can be an explicit or implicit member of a selected team, and if they are part of both a selected team and a non-selected team for a record, they will be granted extra access.

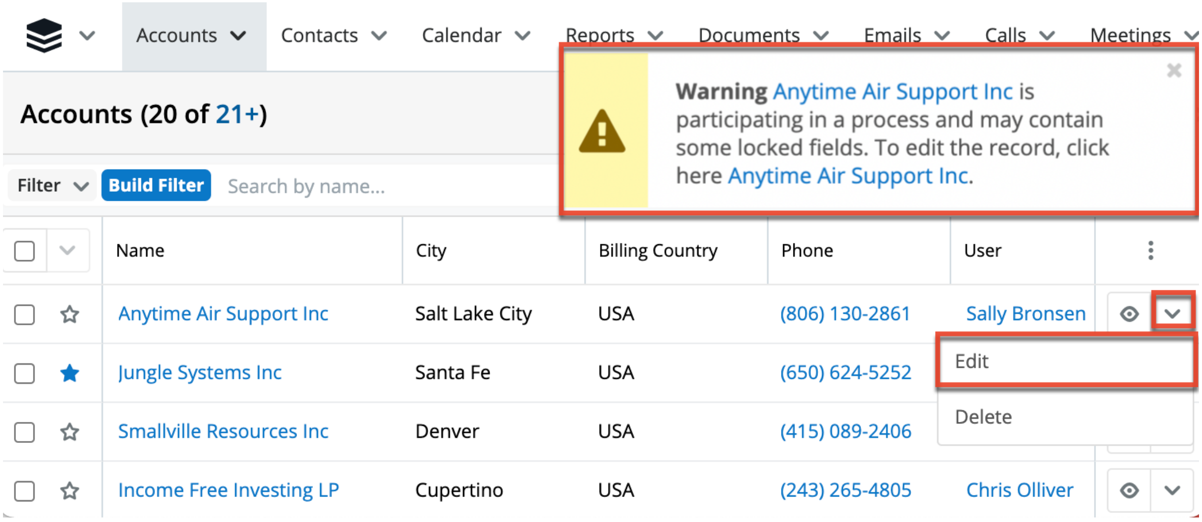
Note: Changes made to the selected state of teams on an existing record are audited in the record's audit log.

Locked Fields

Occasionally, you may see a lock icon (not to be confused with the Lock Button used for team-based permissions) near one or more fields on a record in Sugar. The lock icon indicates that the adjacent field is temporarily locked from editing for all users. Locked fields occur as a result of SugarBPM settings that have been configured by your system's administrator. When a record becomes involved in a process that has locked fields, that record will respect those field locks until the record is no longer participating in the process.



Locked fields are enforced in Sugar for imports, mass updates, and record merging. Please note that records containing one or more locked fields cannot be edited via list view regardless of whether the locked fields appear in the list view's columns. To edit the record's unlocked fields, you must navigate to the record view, which you can do by clicking on the record's link in the alert box or as you typically would in Sugar.



Recalculating Calculated Values

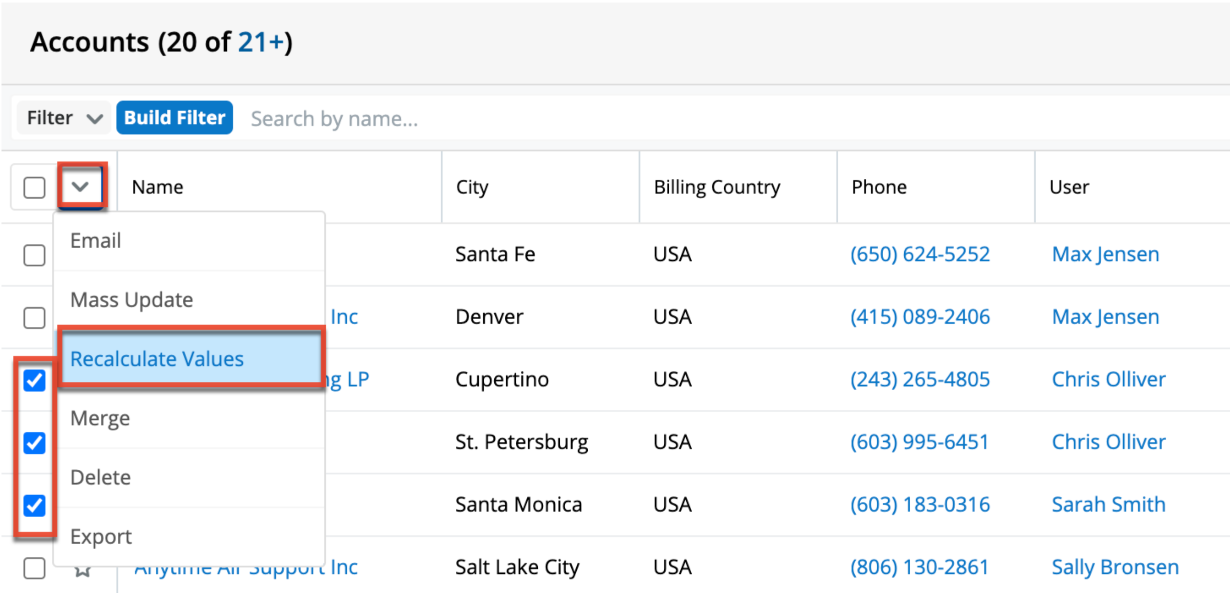
Administrators or users with developer-level role access to a module may see an additional option in the list view's Actions menu: "Recalculate Values". This option appears only for modules that contain one or more calculated fields. For more information on calculated fields, please refer to the Studio documentation.

This utility allows administrators to recalculate affected field values following the addition or alteration of a calculated field in Studio. The Mass Actions menu option allows you to recalculate field values for up to 1000 records at a time. To update more than 1000 records, perform the recalculations in multiple batches as needed.

Note: This action will not appear unless the user is an administrator or has developer-level access to the module and there is at least one calculated value in that module. Please note that your ability to recalculate values may be restricted by a role. For more information on roles, please refer to the Role Management documentation. Check with your system administrator if you do not see the Recalculate Values option.

The following steps cover recalculating values for records from the Accounts list view as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the list view's List View Search to identify accounts you wish to update.
3. Select the desired accounts then choose "Recalculate Values" from the Actions menu.



Finding Duplicate Records

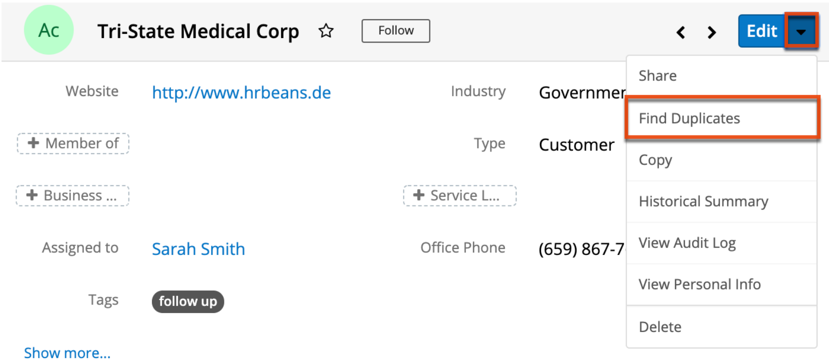
Between multiple users working in Sugar, importing new records, and converting leads, it is possible for duplicate records to be accidentally put into the system. Before creating a new record, the best practice is to first check that the record does not already exist in Sugar. You can identify duplicate records for cleanup using list view search from the module's list view.

Searching for records with similar names or other information can turn search into a powerful, duplicates-finding tool. A wizard is also available for finding potential duplicates and may be used as shown below. If duplicate records are detected, you can perform a merge per the Merging Records section of this documentation.

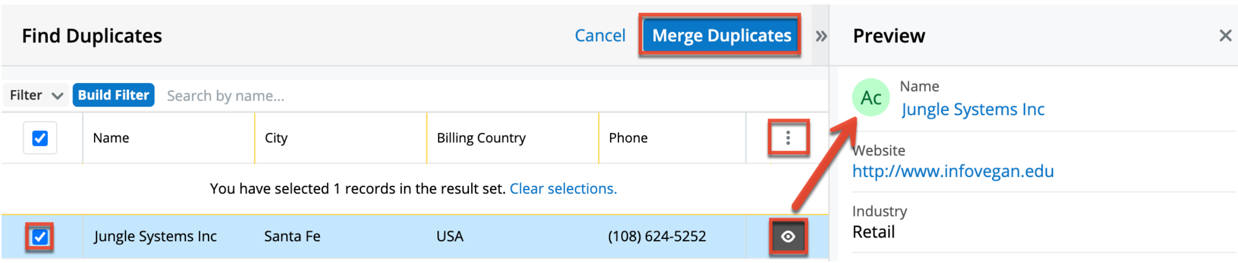
Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents editing records. For more information on roles, please refer to the Role Management documentation. Check with your system administrator if you do not see the Find Duplicates option.

The following steps cover locating duplicate accounts using the Find Duplicates option from the Accounts record view as an example:

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



3. Potential duplicate account records will be listed on the Find Duplicates page. Select the duplicate record(s) you wish to merge then click "Merge Duplicates".
    - You can preview the duplicate record's details by clicking the Preview button to the far right of the record's row.
    - You can search for specific records from the Accounts list view if you wish to check for more potential duplicates. For more information on performing a search, please refer to the List View Search section of this documentation.
    - You can also click the three-dots menu above the Preview button to change the list of fields that display on the list view column headers.



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

Merging Records

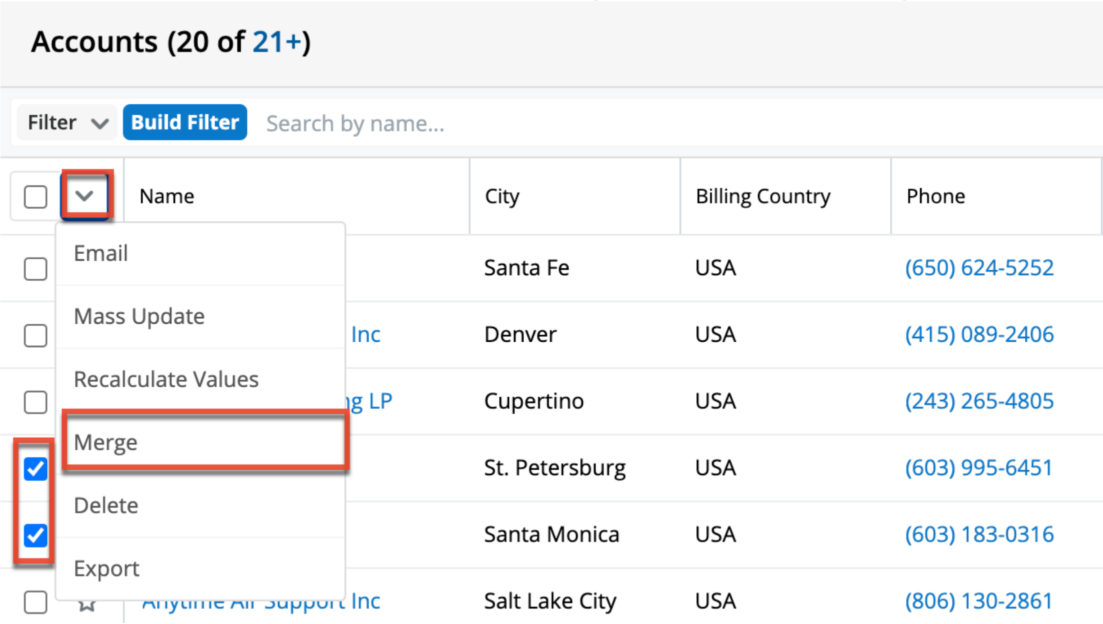
When duplicate records are identified in Sugar, you have the option to merge two or more into a single record. Once the merge is complete, the duplicate record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate records will be merged to the primary record meaning that any calls, meetings, cases, etc. related to the duplicate record(s) will automatically be related to the resulting, merged record.
Note: Date Created, Date Modified, and Password field types are not supported when merging duplicate records in Sugar.

Merging via List View

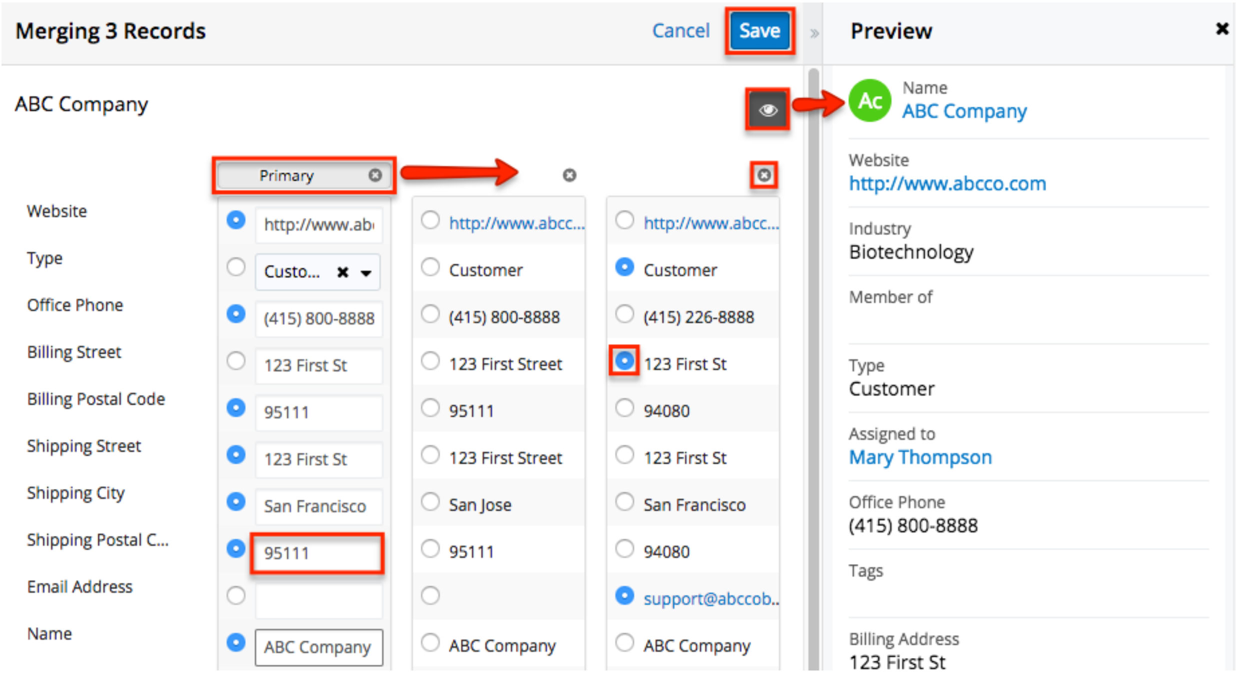
[List View Search](#) may be used to identify duplicate records by, for example, searching for records with similar names. Once your search has identified duplicates, you can merge them directly from the module's list view.

The following steps cover merging accounts via the list view as an example:

1. Use the list view's [List View 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.
    - Please note that up to five records may be merged at once in Sugar. An error message ("Invalid number of records passed. The valid range is from 2 to 5 records.") will appear if more than five records are selected when attempting to perform a merge.



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

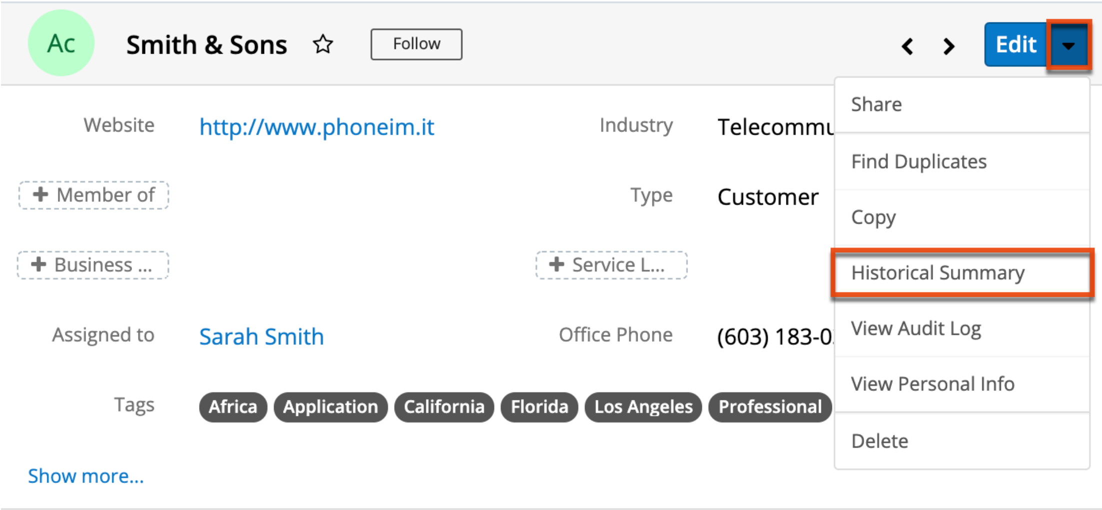


If 3 or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

4. To change which record is considered the primary, drag and drop the Primary label on the top of a different column.
5. Review the field values in each column and click the radio button to the left of the value that should appear on the final record. You can also manually type or select a new value for any field as necessary.
    - **Note**: Fields you do not have Edit access for cannot be edited on the merging records page.
6. Preview what the final, merged record will contain as you work by clicking the Preview button (eye icon) to display the preview in the Intelligence Pane.
7. Click "Save" once all fields you wish to appear on the single, merged record have their radio buttons selected.
8. A pop-up message will display confirming that the duplicate record(s) should be deleted. Click "Confirm" to proceed.

Viewing Record Historical Summaries

For modules that are related to activity records (e.g., calls, meetings, emails, notes, and tasks), you can view quick details of the related activities via a record's Historical Summary option. From the record view, simply select "Historical Summary" in the Actions menu.



The Historical Summary shows a digest of the following activity records that are considered closed by virtue of their statuses:

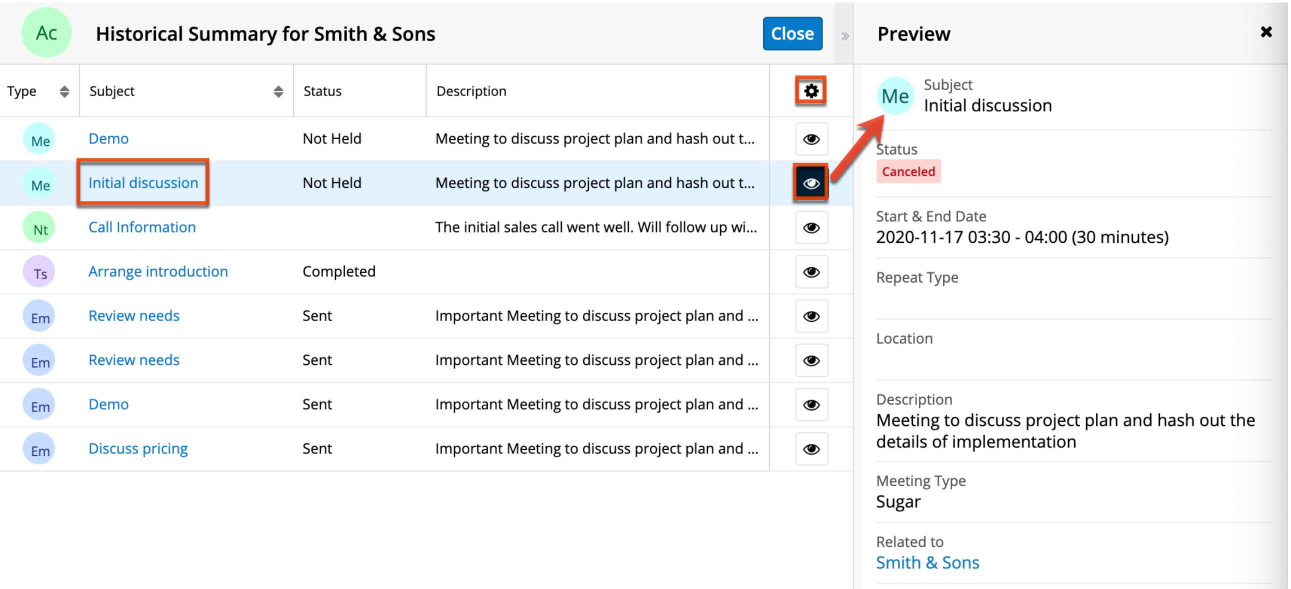
Record Type	**Included Statuses**
Calls	Held, Canceled
Emails	Sent, Received, Archived
Meetings	Held, Canceled
Notes	All notes
Tasks	Completed, Deferred

Note: Calls and meetings with a Canceled status will display a status of "Not Held" in the Historical Summary.

The Historical Summary page will display as a list view with each activity's type, subject, status, description, etc., and allow you to click the activity's name to view its full details. You can add additional fields by clicking the Column Selection icon to the far right of the list view column headers. You can also preview the activity record in the intelligence pane by clicking the Preview button to the far right of each record's row, providing key information as well as any activity stream information. For more information on activity streams, please refer to the Activity Streams documentation.

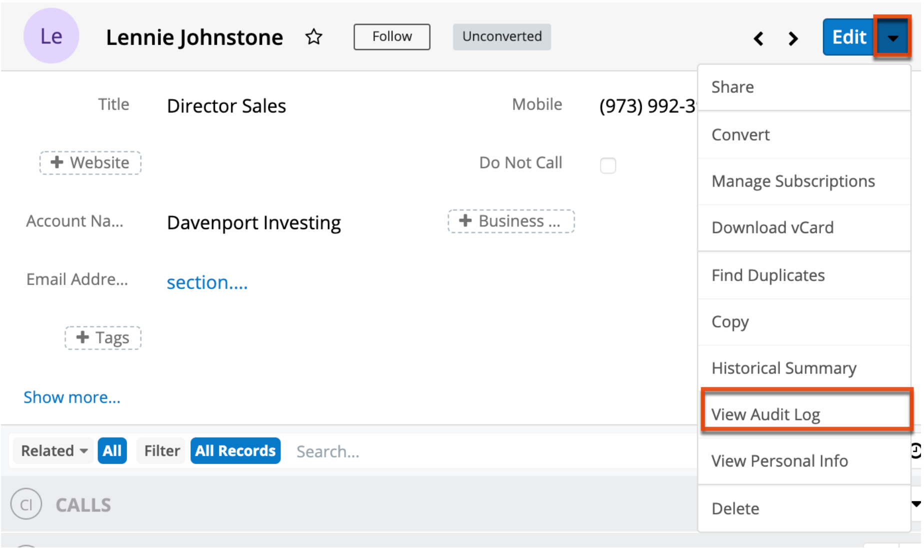
The Historical Summary list view provides the ability to reorder columns by dragging and dropping the title of the column to the desired location. The new column order is saved to the database so that the order will remain for a user upon subsequent visits to the module, even if the browser cache is cleared. You can reset the column order to the default view by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default view". Please note that this option only appears if the current list view column order is different from the system's default column order.

Users can also easily adjust the size of columns in the Historical Summary list view per their viewing preference. Simply place your cursor on the column divider, and when the Left-and-Right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions. You can reset the column width to the default size by clicking the Gear icon to the far right of the list view column headers and selecting "Reset default widths". Please note that this option only appears if at least one of the column widths in the Historical Summary list view is different from the default column width.

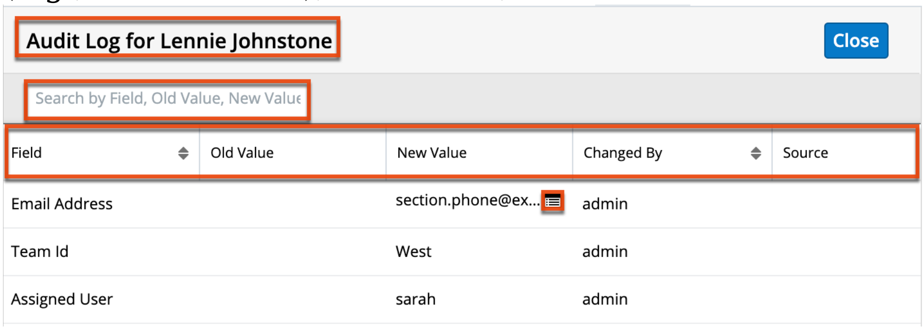


Viewing Record Audit Logs

Changes made to each record are tracked over time, and users are able to view the history of changes via each record's audit log. To access the audit log, simply navigate to the record view and select "View Audit Log" from the Actions menu. Please note that the audit log only tracks changes to fields that are marked as "Audit" via Admin > Studio. For more information on designating fields for audit, refer to the Studio documentation. The list of fields currently marked for audit for the module will appear at the bottom of each record's audit log page.



Once the audit log opens, the header will display the name of the current record to better identify which record's audit log the user is viewing. Please note that the header will just display "Audit Log" and not include the record's name if the user does not have access to the record's name or the record's name is blank. Below the header, the user can perform a search to retrieve log entries for specific fields (e.g., Office Phone), old values, or new values.



The audit log contains the following fields:

Field	Description
Field	The name of the audited field that has a change in value. **Note**: Only fields marked as "Audit" in Admin > Studio will be displayed in the audit log.
Old Value	The old field value prior to the data change.
New Value	The new field value after the data change.

Changed By	The Sugar user who made the data change.
Source	The source (e.g., Sugar user, Web to Lead form) from which each field change originated. **Note**: The field may be blank if the source is unknown.
Change Date	The date the field change occurred.

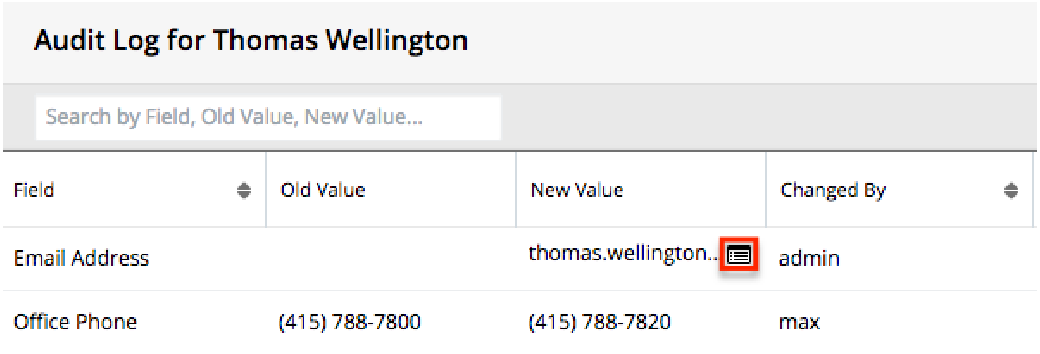
The rows of the audit log represent each time that an audited field is set or changed, starting with values specified during the record's creation. In addition, when any email address changes are captured in the audit log, the email audit icon appears to the right of the email address which provides users access to the email address audit log. For more information, refer to the Viewing Email Address Audit Logs section below.

In addition to the old and new values of each field change, the time and source of the change are recorded. When a user is directly responsible for the change, whether by editing in Sugar or via an authenticated service such as Sugar's Plug-in for Microsoft Outlook, the user will be specifically named. However, many non-user entities are also responsible for record changes. Potential source values are as follows:

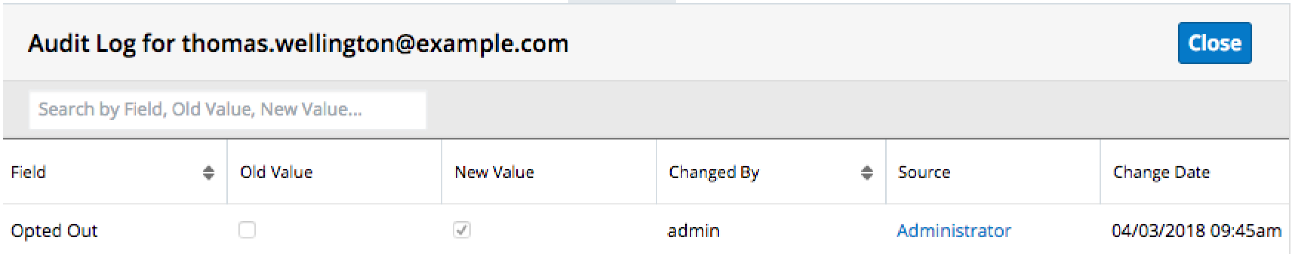
- SugarBPM
- BWC UI
- Rest API
- SOAP or v4_1 and older REST API
- CLI
- Cron Job
- Logic Hook
- Sugar Workflow
- User
- Web to Lead
- Installer

Viewing Email Address Audit Logs

Email address audit log entries are generated for an email address whenever the "Opted Out" or "Invalid" flags are modified or when an opt-in link is generated. These changes are captured in the email address audit log which can be accessed by clicking the email audit icon to the right of the email address on the record audit log.



The email address audit log contains the same fields (e.g., Fields, New Value, Source) as the record audit log but will only display entries when there are changes to the Opted Out and/or Invalid options for the email address. Please note that the email address audit log will not display any data if an email address is not marked as "Opted Out" or "Invalid" when it is initially added to the record.



Viewing Personal Information

For organizations that prioritize data privacy, fields that contain personally identifying information for an individual are of particular importance. Admins can designate these fields as "Personal Information" via Admin > Studio. If your organization's data privacy procedures include providing individuals with a record of the data you have recorded about them, the View Personal Info option provides a valuable tool for condensing all of a record's personal information on one screen. For more information on using this option and servicing data privacy records of types "Send Personal Information Being Process" or "Export Information", refer to the Data Privacy Guide.

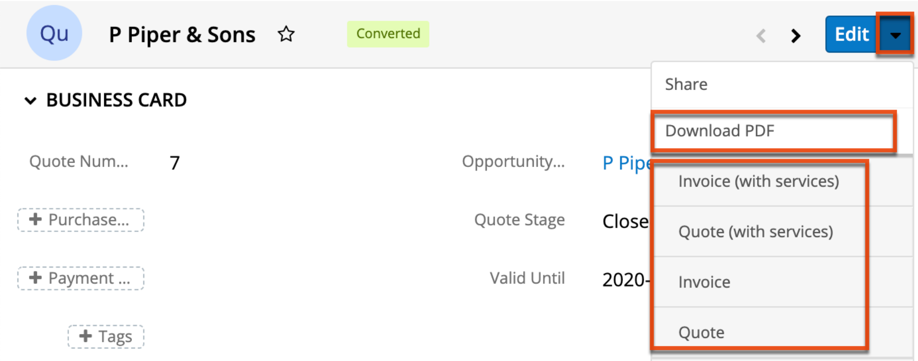
Record PDFs

If you require a record's information outside of Sugar, you can download or email the information in PDF form. Administrators have the ability to build multiple PDF templates via Admin > PDF Manager for each module to ensure that the relevant record information is being included for your specific purpose. For more information on creating and managing PDF templates, please refer to the PDF Manager documentation. Please note that the Download PDF and Email PDF options will only appear in the Actions menu if there is an existing PDF template available for the module.

Note: If a user's email address is empty in their profile or if they have set their email client to "External Email Client", then the "Email PDF" option will be hidden for that user.

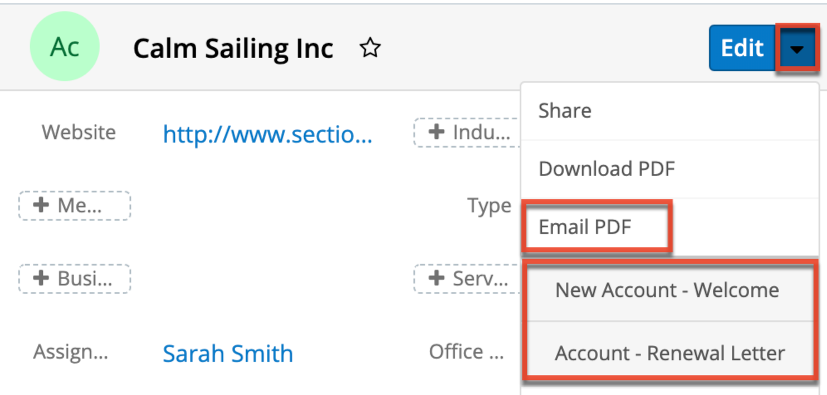
Downloading Record PDFs

Download record information as a PDF file via the desired record's record view by selecting "Download PDF" from the Actions menu. All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option. Simply select one of the templates to generate the PDF file to view or save onto your local machine.

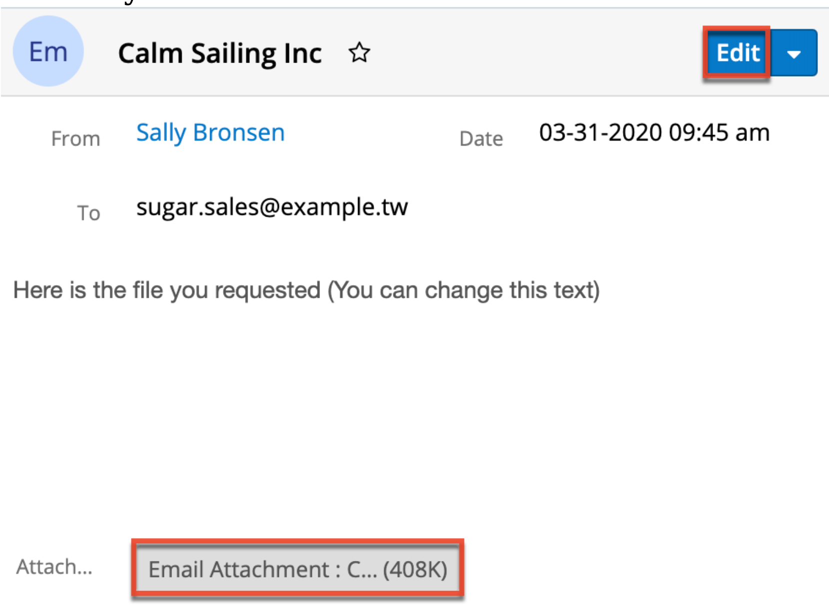


Emailing Record PDFs

Users also have the option to email record information as a PDF file using Sugar's email client. From the originating record's record view, click the Actions menu and select "Email PDF". All of the PDF templates that your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.



Select one of the templates to create a draft in the Emails module. Sugar will deliver you to the record view for the email.



The draft will have the following information pre-populated:

- **From**: The logged-in user's outgoing default email account
- **Date**: The date the message is being sent
- **To**: The primary email address of the originating record (if available)
- **Subject**: The name of the originating record
- **Body**: "Here is the file you requested (You can change this text)"
- **Attachment**: The PDF file created from the originating record
  - The file's name will appear as "Email Attachment : {originating_record_name}_{template_name}.pdf"; for example, "Email Attachment : Acme_25_units_Customer_invoice.pdf".
- **Teams**: The logged-in user's default team(s)
- **Assigned To**: The Sugar user assigned to the email record
- **Related To**: The originating record and its module

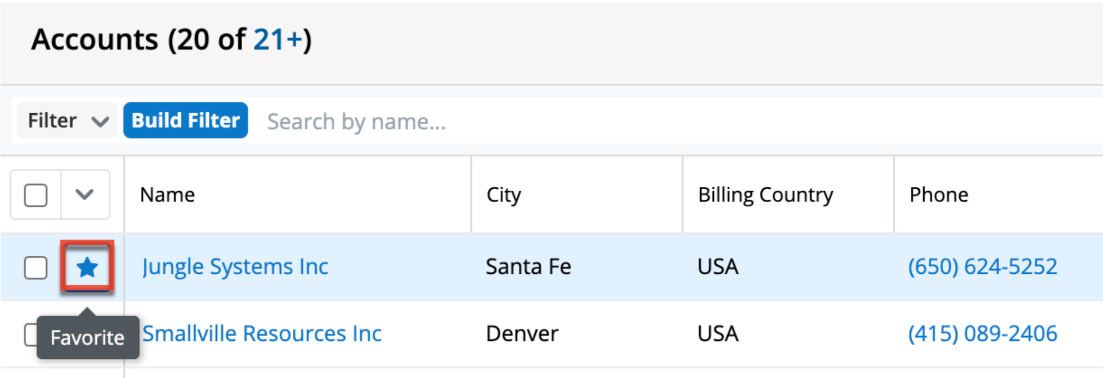
Click "Edit" on the draft email record to reveal the Send button or to update the fields as necessary and then click "Send". For more information on sending emails via the Emails module, please refer to the Emails documentation.

Favoriting Records

Each Sugar user has the option to designate their own favorite records which are important or will be viewed often so that they can easily be accessed via list view search or from the module tab. Once records are marked as favorites, select "My Favorites" from the Filter option next to the Search bar or select from your most recent favorites directly from the module tab.

Favoriting via List View

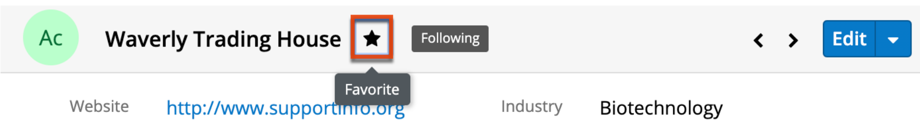
The following steps cover marking records as favorites via the Accounts list view as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the List View Search to find the account records you wish to mark as favorites.
3. Darken the star icon on the left of each desired account's row by clicking on the star one time.


4. To remove the account as a favorite, click the star again to revert it to white.

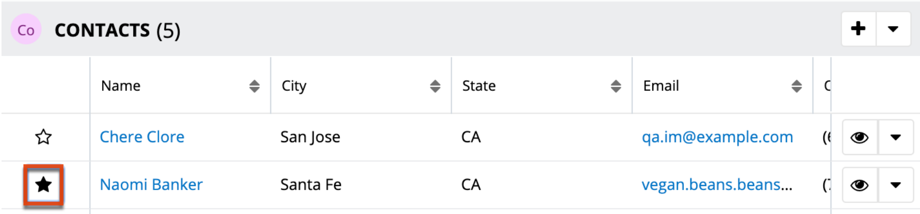
Favoriting via Record View

The following steps cover marking records as favorites via the Accounts record view as an example:

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


Favoriting via Subpanel

The following steps cover marking account records as favorites via the subpanel in related modules as an example:

1. Navigate to a related module's record view.
2. Click the star icon to the left of the desired record's row in the Contacts subpanel.


3. To remove the contact as a favorite, click the star again to revert it to white.

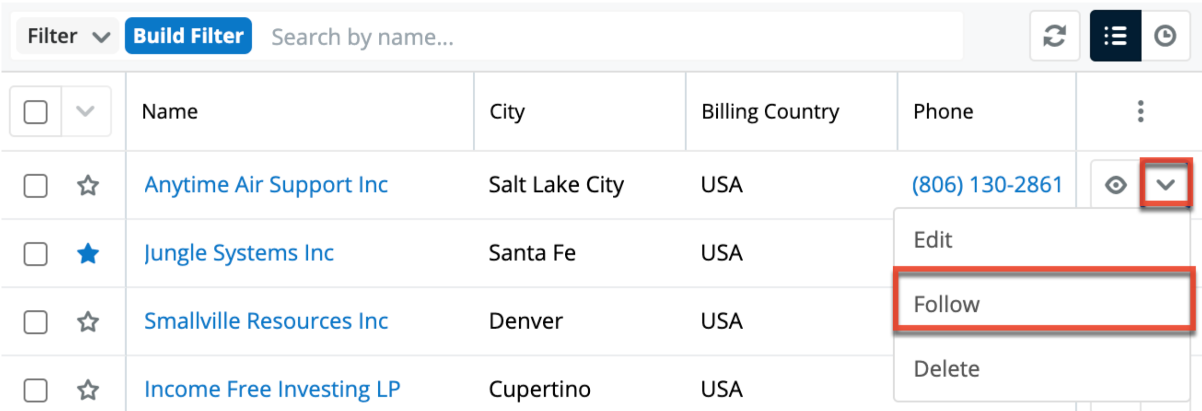
Following Records

Users can also choose to follow individual records. This allows each user to personalize their activity stream by specifying which records' posts should appear on the activity streams displayed on their Home page and in module list views. Please note that you will automatically follow the records that you create as well as records that are assigned to you. You will not, however, automatically follow the records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record. For more information about activity streams, please refer to the Activity Streams documentation. Please note that the Follow option in Sugar is not available if the activity stream functionality is disabled for your instance. For more information, refer to the System documentation in the Administration Guide.

Following via List View

The following steps cover marking an account to follow via the Accounts list view as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the List View Search to find the Account records you wish to follow.
3. Click the Record Actions menu to the far right of the records row and select "Follow".

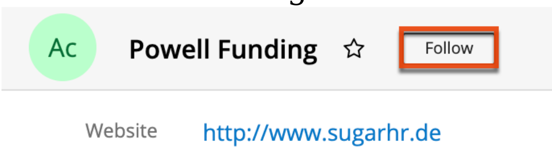


4. To stop following the account, click the Record Actions menu and select "Unfollow".

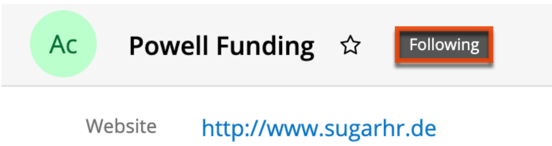
Following via Record View

The following steps cover marking an account to follow via the account's record view as an example:

1. Navigate to an account's record view.
2. Click on the Follow button to the right of the account's name to change its label to "Following".

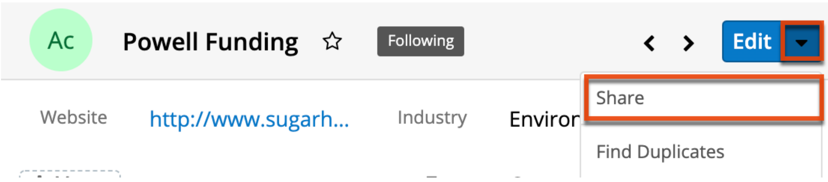


3. To unfollow the account, click on the Following button to revert its label to "Follow".



Sharing Records

Individual records can be shared with other users in your organization by sending an email including the record's direct link. In the desired record's record view, select "Share" from the Actions menu. A Compose Email window will open, and the email's text will include the URL of the record. Enter the recipient(s) email address in the To field then click "Send".

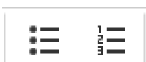


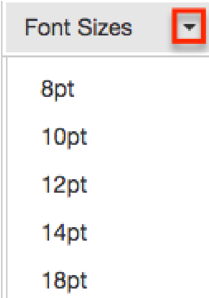
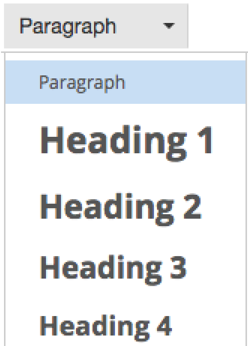
The recipient can simply click the link in the email to access the account record in Sugar. Please note that the user must be logged in to Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation.

Using the TinyMCE Text Editor

TinyMCE is a third-party WYSIWYG editing tool used by Sugar so that users can create content such as knowledge base articles and email messages with rich-text formatting elements. TinyMCE V4 is used in all Sugar modules with the exception of email templates within the Campaign wizard, which uses TinyMCE V3.

TinyMCE's rich-text editor framework presents the following familiar formatting options. This does not represent all tools that may be available in the editor. Please refer to the TinyMCE Documentation for more information.

Element	Button(s)	Function
Source Code		Bypass the rich-text editor options and insert your own HTML code or view the HTML code of an existing template to make advanced changes.
Bold, Italic, Underline, Strikethrough		Use these basic font formatting options to easily add common styles to text in the message body.
Bullet List, Numbered List		Transform paragraphs in the message body into a formatted list.
Align Left, Align Center, Align Right, Justify		Set paragraph alignment.
Text Color, Background		Choose a custom font

Color		color or highlight text with a background font color.
Clear Formatting		Clear any formatting.
Insert/Edit Image, Insert/Edit Link		Insert or edit an image or a link.
Font Sizes		Choose a font size for the text.
Paragraph		Choose a format for headers.

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Activity Streams

Overview

Sugar's activity stream allows users to view a list of activities performed on records, create posts, preview posts, comment on posts, etc. Users can easily track the most recent updates across their entire organization via the record and user posts on the activity stream. The activity stream can be accessed via the home page, module list view (e.g., Contacts list view), module's record view (e.g., Contacts record view), as well as the intelligence pane.

Note: Sugar's activity streams are disabled by default, but administrators can globally enable the functionality based on their organization's needs. For more information, refer to the System documentation in the Administration Guide.

Please note that older activity stream records may be purged from the database by the Activity Stream Purger scheduler if enabled by your administrator.

There are a number of modules currently enabled to generate record posts for the activity stream such as Accounts, Contacts, Calls, Meetings, etc. This documentation will go over the basics of the activity stream as well as the various options available when viewing posts, creating posts, commenting on posts, etc.

Viewing Activity Streams

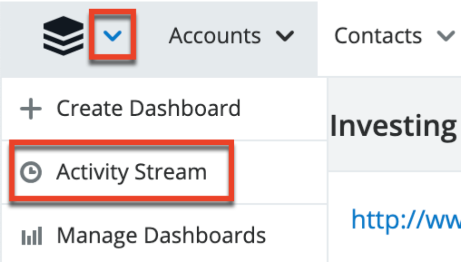
There are various options available for viewing activity streams in Sugar including via the home page, dashlet, list view, record view, and intelligence pane. Users will be able to view record posts (e.g., create, update, link, unlink), user posts, comments, and attachments via the activity stream. Keep in mind that if you are not the assigned user or did not create the record, you must follow the record in order to view all related posts via the Home page and List view activity stream.

Please note that you will only be able to view and access the activity stream for audit-enabled modules (e.g., Accounts, Contacts, Meetings, Calls) in Sugar. Un-audited modules (e.g., Target, Target List) will not display the list view activity stream, record view activity stream, or provide the option to follow a record.

Note: Activity streams are not available for custom modules.

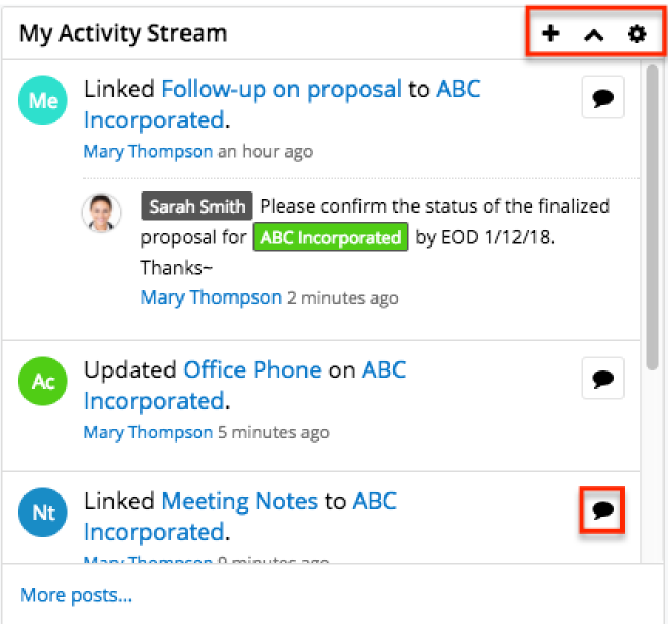
Viewing via Home Page

The Home page activity stream allows users to view all posts for records they are following in Sugar as well as all user posts created on the Home page activity stream. For more information on following records, please refer to the Following Records section. You can access the Home page activity stream by clicking the triangle next to the Sugar cube icon on the upper left of Sugar then selecting "Activity Stream". All posts created via the Home page activity stream will be viewable by users in your organization. For more information on creating posts, please refer to the Creating User Posts section. You can also comment on posts by clicking the Comment button and preview posts by clicking the Preview button to the right of each post.



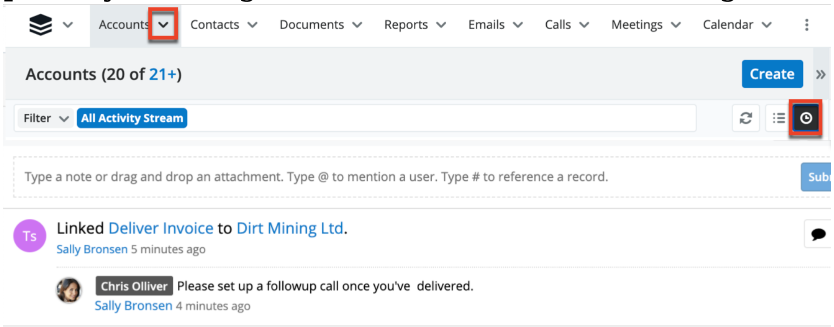
Viewing via Dashlet

The My Activity Stream dashlet displays the user's main Activity Stream within a dashboard, eliminating the need to navigate to the Activity Streams view to monitor the most recent stream activities. Like other Activity Stream views, the dashlet supports inline commenting on specific stream activities, but it does not allow record previews. The dashlet may be added to your home page or to the intelligence page of any module's list view or record view. When added to an Intelligence Pane, the My Activity Stream dashlet will display stream items in context to the data within the main container of the page. For more information on the My Activity Stream dashlet, please refer to the Dashboards and Dashlets documentation.



Viewing via List View

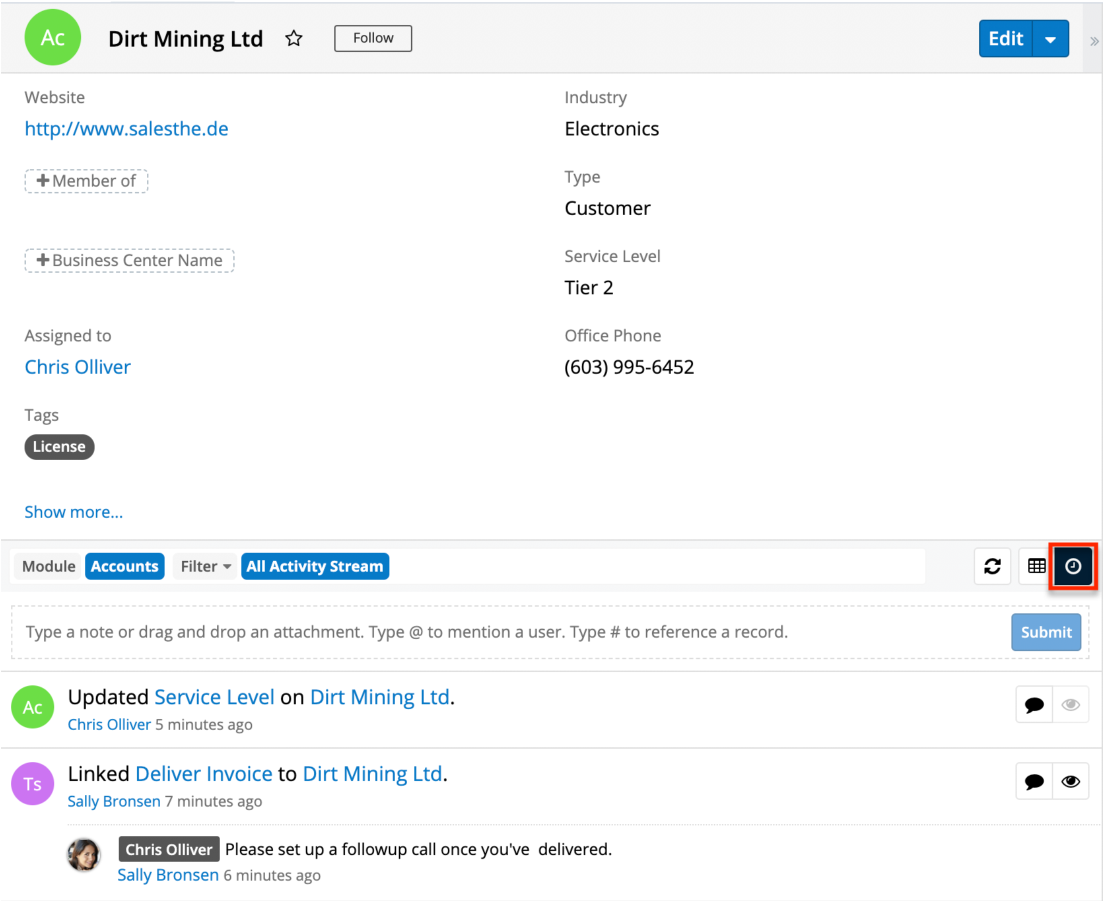
The list view's activity stream displays all posts for records being followed in the current module as well as all user posts created on the list view activity stream. For more information on following records, please refer to the Following Records section. To access the list view activity stream, click the specific module tab (e.g., Contacts) at the top of the navigation bar then click the Activity Stream button to the right of the list view's search bar. You can view both user and record posts relevant to the module as well as create a post and comment on posts. For more information on creating posts and commenting on posts, please refer to the Creating User Posts and Commenting on Posts section. You can also preview the post by clicking the Preview button to the right of each post.



Viewing via Record View

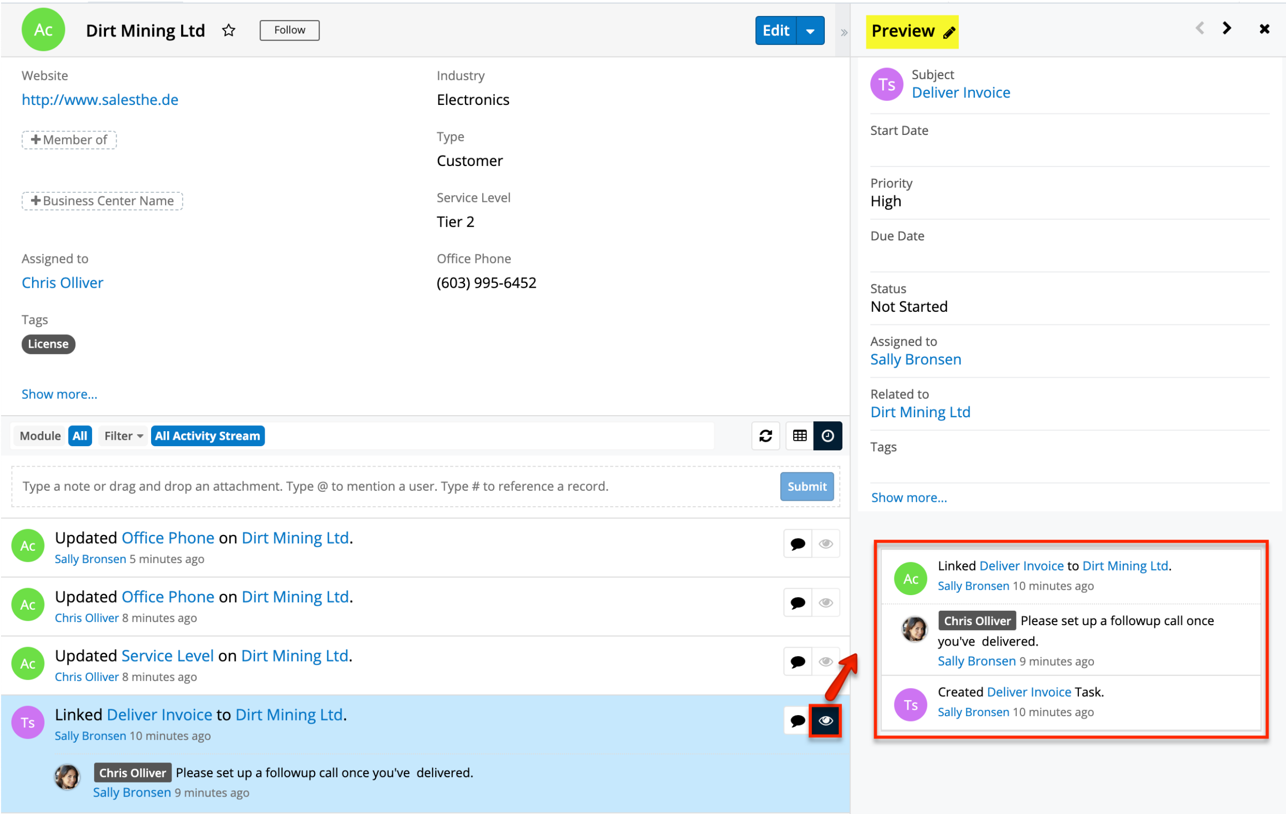
The record view's activity stream displays all posts specific to the current record you are viewing. Users can view all posts in the record view's activity stream even if they do not follow the record in Sugar. Please note that you must follow the record if you wish to view the record view posts via the Home page or List View activity stream. For more information on following records, please refer to the Following Records section. To access the record view's activity stream, navigate to a module's record view (e.g., Avery Software Co) then click the Activity Stream button below the module's fields.

Please note that user posts created via the Home page or List View activity stream that reference the specific record's name will also appear in the record view's activity stream. For more information on referencing specific records, please refer to the Referencing Users and Records section.



Viewing via Intelligence Pane

The intelligence pane in Sugar allows users to view a record's detail along with the related activity stream information directly from the Home page activity stream, module's list view, as well as the record view. To preview a record's details, simply click the Preview button to the right of a record post on the Home page or List View activity stream. You can also preview a record via the module's list view or related record subpanel by clicking the Preview button to the far right of each record's row. Any associated user and record posts will appear below the record's detail in the intelligence pane. Please note that unlike viewing via the Home page, List View, or Record View activity stream, you cannot create posts or comment on posts via the intelligence pane.



Activity Stream Views

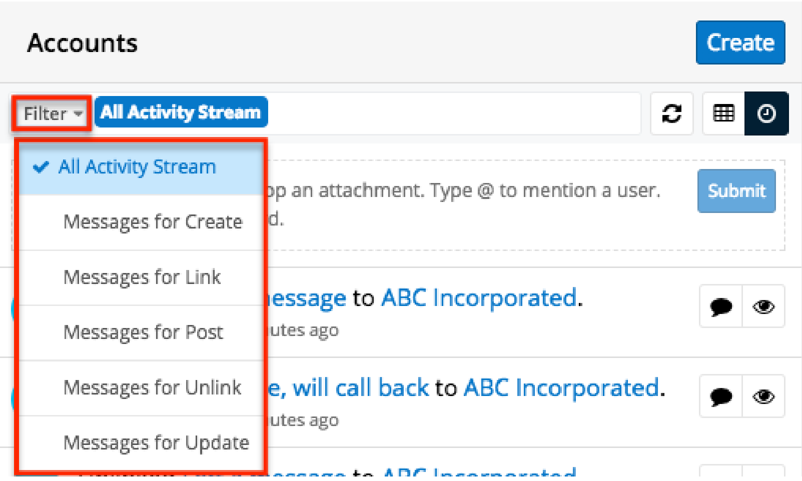
The activity stream allows users to view a list of activities performed on records, post messages, share external links, etc. The activity stream can be accessed via the Home page, module's list view (e.g., Contacts list view), as well as the module's record view (e.g., Contacts record view). For more information on viewing the activity stream in Sugar, please refer to the Viewing Activity Streams section. The following will cover the various options available to users when creating posts, viewing posts, commenting on posts, etc. in the activity stream.

Post Options

There are various post options (e.g., external links, images) available to users when creating user posts in the activity stream. You can add external links, messages, etc. to your user post by dragging and dropping the corresponding links into the post input box. Files saved on your local machine can also be attached to your user post to share with users in your organization. In addition, you can mention specific users as well as reference specific records by typing in the @ or # sign followed by the user or record name. For more information on the various post options available, please refer to the User Post Options section.

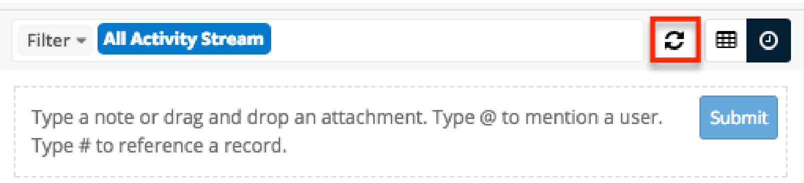
Filter Options

The activity stream can also be filtered to only display certain messages (e.g., Messages for Create, Messages for Update) by clicking "Filter" above the post input box then selecting the desired message type. This enables users to filter the activity stream to only display specific activity type's they wish to view. To view all posts in the activity stream, simply select the All Activity Stream option in the filter.



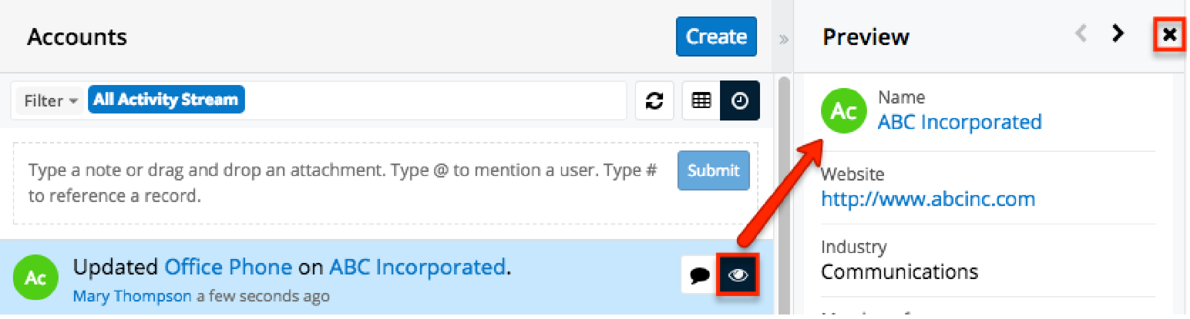
Refresh Button

The Refresh button is located to the right of the filter options and provides a quick way to load the most recent activity stream posts without reloading the browser or losing any filter criteria you may have set. Simply click the button to refresh the current view.



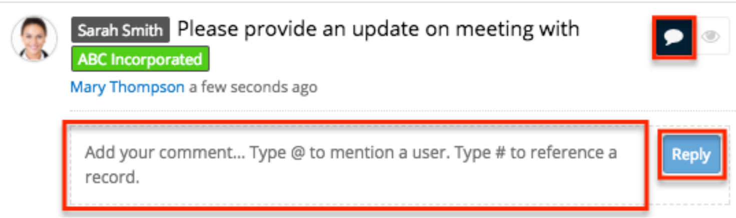
Preview Button

The Preview button to the right of each post allows users to preview the record referenced in record posts. The intelligence pane will display the record's details with key information regarding the record as well as any related activity stream information. Please note that preview is available for Create, Update, Link, and Unlink-type posts in the activity stream. User posts that originate from the record view's activity stream can also be previewed on the Home page and List View activity stream as it automatically references the record in the post. To close the preview, simply click the "X" on the upper right of the intelligence pane. For more information on previewing posts, please refer to the Previewing Posts section.



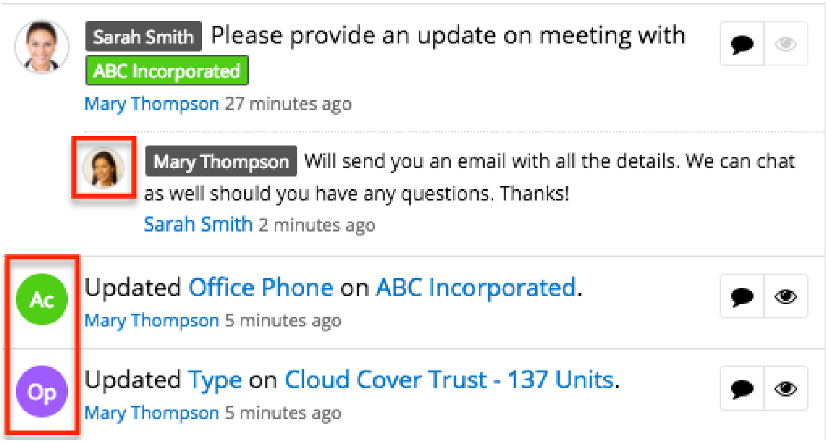
Comment Button

Users can respond to posts via the activity stream by clicking the Comment button to the right of each post. Once you click on the button, simply type your message into the comment box then click "Reply". Please note that comments are visible to all users in Sugar unless they do not follow the record in Sugar. For more information on following and unfollowing records, please refer to the Following Records and Unfollowing Records section. When a comment is added, the post will move to the top of the activity stream once the activity stream page is refreshed. For more information on commenting, please refer to the Commenting on Posts section.



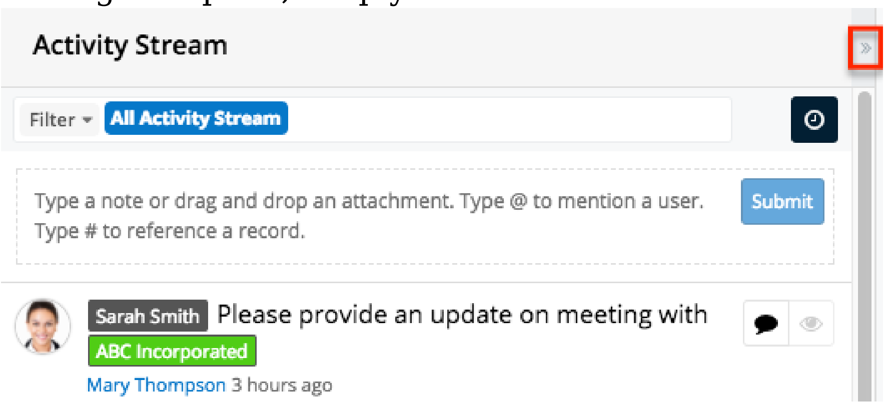
Post Icon

To the left of each post is the Post icon which allows users to easily identify the module that a record post is specific to, the user who created the post, etc. The Post icons for record posts are color-coded and display the first two letters of the module to differentiate the various record posts for modules. For example, an update post for the Accounts module will display a green circle with the letters "Ac", while a post for the Opportunities module will display a purple circle with the letters "Op". User posts, as well as comments added to posts, display the user's profile image as the post icon, which helps to identify the user who created the post or added the comment. For more information on uploading a profile picture to your Sugar account, please refer to the User Profile section of the Getting Started documentation.



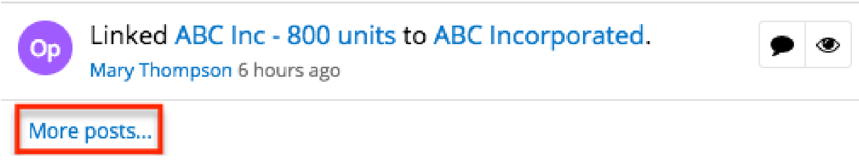
Right Hand Side Drawer

On the upper right of the Home page activity stream, module's list view, and record view, there is a double-arrow icon that allows users to expand the activity stream to the full-screen width. The intelligence pane is hidden when the activity stream is expanded. To reduce the activity stream's width and reveal the intelligence pane, simply click the double-arrow icon again.



More Posts

The activity stream loads an initial number of posts with the option to show additional posts at the user's request. By default, Sugar displays 20 posts per activity stream view, but administrators can change the number of posts displayed via Admin > System Settings. For more information on changing the number of displayed posts, please refer to the System documentation in the Administration Guide. To load the next set of posts, simply click the "More posts..." link on the bottom left of the activity stream.



Personalizing Activity Stream

Users can personalize their activity stream by specifying which records' posts should appear on their Home page and List View activity streams. You can follow specific records that you have access to view in Sugar by marking the Follow button in the record view or the Follow option in the list view. Please note that you automatically start following records that you mark as favorites in Sugar.

Following Records

Users can choose to follow specific records to which they have access to in Sugar. You can mark a record to follow via the module's list view by selecting "Follow" in the record actions menu as well as the record view by clicking the Follow button to the right of the record's name. For more information on following records in Sugar, please refer to the User Interface documentation. All posts appear on the Home page and List View activity stream for records you follow in Sugar. Please note that you will automatically follow records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record.

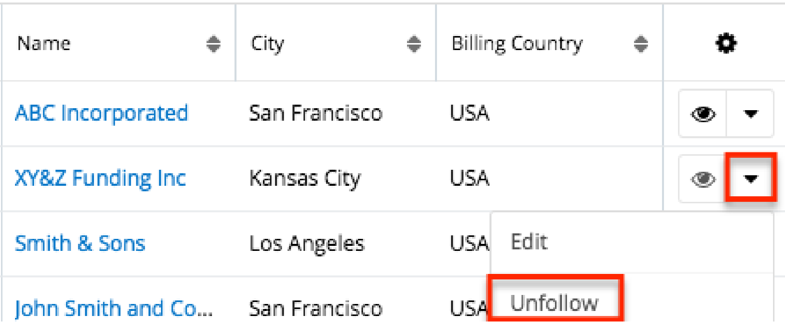
Favoriting Records

Each Sugar user has the option to designate their own favorite records which are important or will be viewed often so that they can easily be accessed via search or from the module tab. You can mark a record as a favorite via the module's list view, record view, and related record subpanels. For more information on favoriting records in Sugar, please refer to the User Interface documentation. Please note that you will automatically start following records you designate as favorites in Sugar.

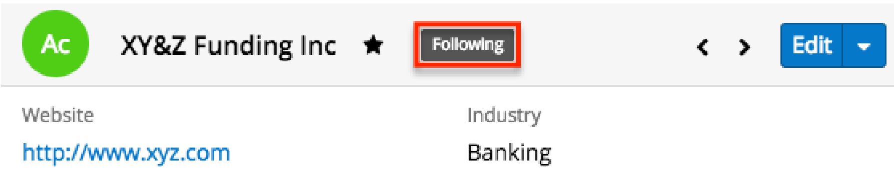
Unfollowing Records

Users can also choose to unfollow records that they no longer wish to view posts for in their activity stream. Please note that this will prevent all future posts as well as the associated comments from appearing in your Home page and List View activity stream. However, historical posts associated to the unfollowed record will continue to appear in your activity stream. To unfollow a record via the list view, click the Record Actions menu then select "Unfollow". To unfollow a record via the record view, simply click the Following button again. Please note that you will automatically stop following a record should you lose access to a record in Sugar. Also, if you remove a record as a favorite, the Following status will not change and you must unfollow the record accordingly.

From list view:



From record view:

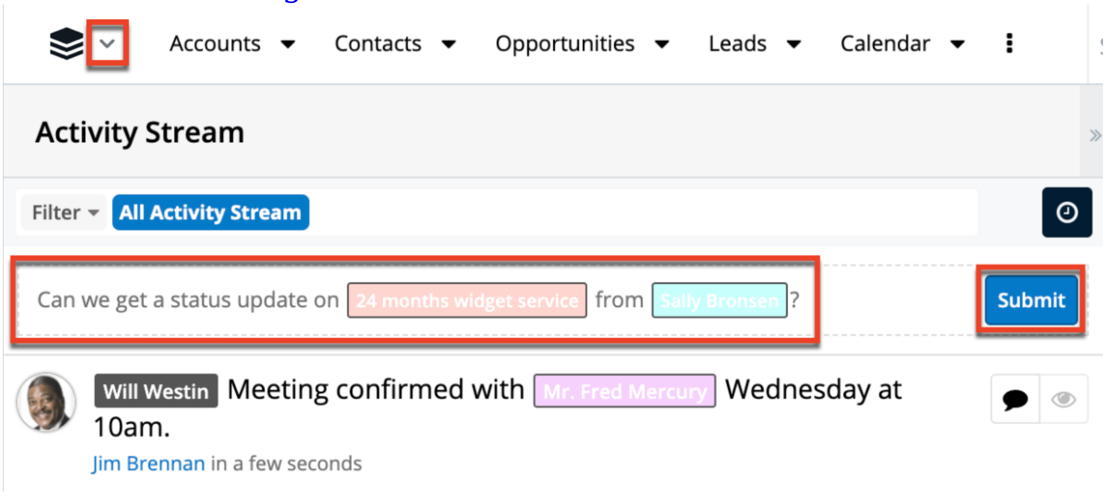


Creating User Posts

Users can access the activity stream to view a list of activities performed in Sugar, track updates, as well as post messages to other users in their organization. To create a post, simply enter your message into the post input box at the top of the activity stream view then click "Submit". Please note that user posts display the user's profile image to the left of the post as the Post icon. For information on Post icons, please refer to the Post Icon section in this documentation. In addition to the Post icon, the timestamp of when the post was created and the user's name who created it will display as well. There are various options available when creating posts such as adding links, images, attachments, external messages, etc. You can also reference a specific Sugar record or user by typing @ followed by the user's name (e.g., @John Smith) or # followed by the records name (e.g., #ABC Company) in your post. For more information on the different post options available, please refer to the User Post Options section.

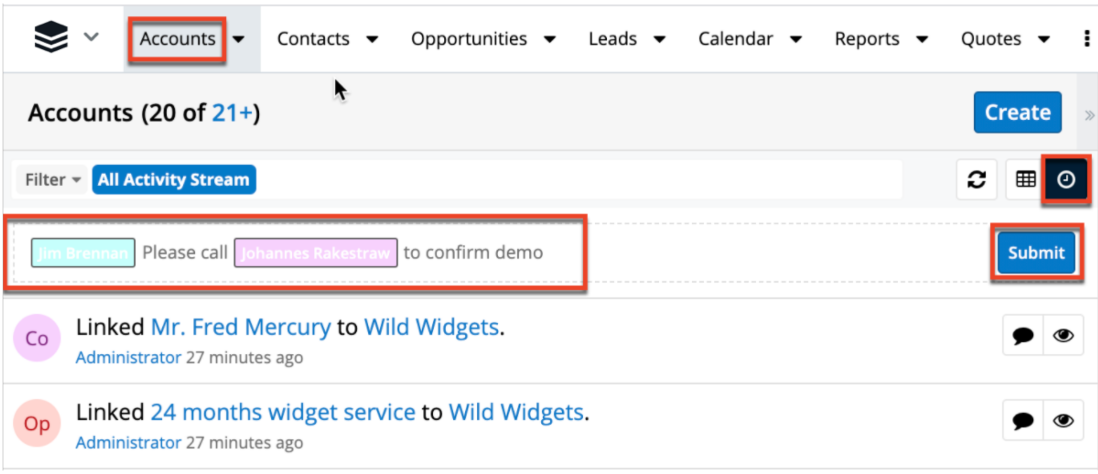
Creating via Home Page

The Home page activity stream can be accessed by clicking the triangle next to the Sugar cube icon then selecting "Activity Stream". The post input box displays beneath the Filter option and you can enter your message then click "Submit" for the post to appear within the activity stream. Please note that user posts created via the Home page are viewable by all users in your organization. Posts that reference a specific record will also appear in that record view's activity stream as it is linked. For more information on referencing records in your post, please refer to the Referencing Users and Records section.



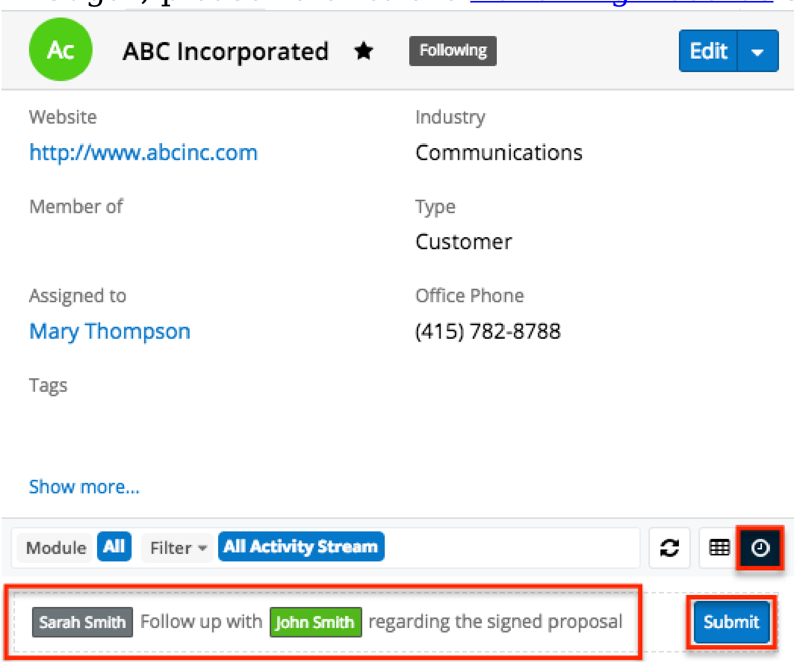
Creating via List View

The List View activity stream can be accessed by navigating to a module's list view (e.g., Accounts) then clicking the Activity Stream button to the right of the list view's search bar. You can create a user post by entering your message into the post input box then clicking "Submit". Please note that posts created via the list view activity stream are visible in the record view's activity stream if the specific record's name is referenced in the post. Also, if you reference a user (e.g., @Jim Brennan) in your post, they will see the post on their Home page activity stream as well. For more information on referencing records and users in your post, please refer to the Referencing Users and Records section.



Creating via Record View

The Record View activity stream can be accessed by navigating to a module's record view (e.g., ABC Incorporated) then clicking the Activity Stream button below the module's fields. To create a user post, simply enter your message into the post input box then click "Submit". Please note that posts added via the record view activity stream are only viewable within that record's view unless a user is following the record. All posts appear on the Home page and List View activity stream for records you follow in Sugar. For more information on following records in Sugar, please refer to the Following Records section.



User Post Options

There are various options available when posting a message in the activity stream such as adding an attachment, external link, referencing Sugar records, etc. Users can easily drag and drop files, links, news feeds, etc. from their local machine, external sites, as well as Sugar dashlets. You can also mention a specific user in your post that you would like the message targeted to as well as reference records that you wish to link the post to in Sugar. Please note that every user in Sugar will be able to view the post if it's created via the Home page activity stream regardless of whether a specific user is mentioned in the post.

Adding Rich Content and External Messages

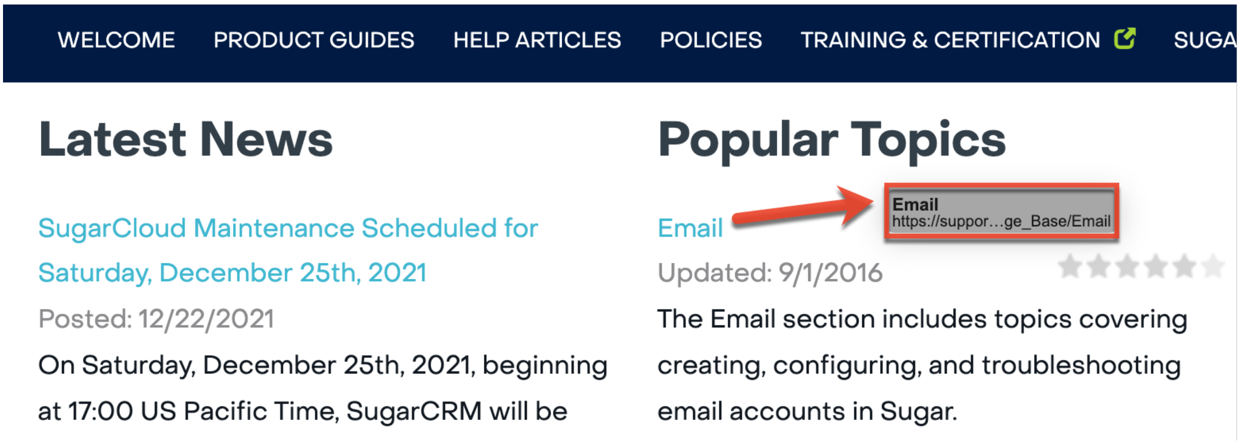
Users have the option to add external links, images, and videos as well as external messages (e.g., tweets, news articles) into their user post. This allows you to easily share information across the organization by posting relevant links, videos, news articles, etc. that will be important for other users to view. For more information on previewing posts, please refer to the Previewing Posts section.

To add external links, messages, etc., simply drag and drop the corresponding title that's linked to a URL into the post input box. For example, to add a video from YouTube, click the title (e.g., "How to install SugarCRM") of the video then drag and drop the link that appears into the post input box. The URL along with the video will appear within the post once you submit it. For external twitter feeds, you will need to click the post date (e.g., Jan 3) of the feed then drag and drop the link that appears into the post input box. To attach an image to your post, copy and paste the corresponding image URL into the post input box and the image will appear within the post once submitted.

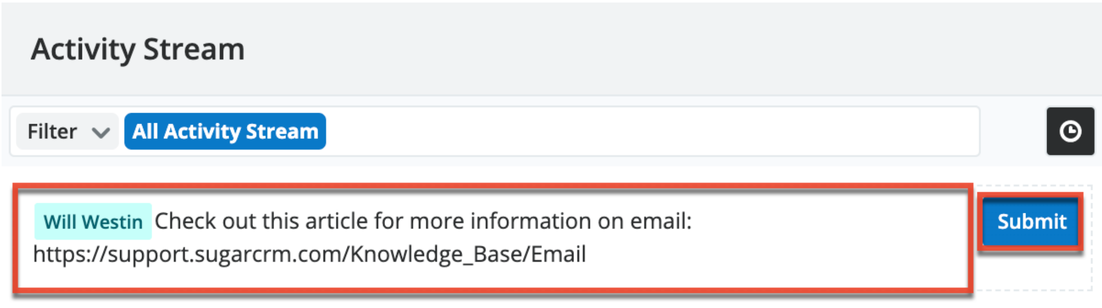
You can also reference a specific record in the post if you wish to link the post to the record. For more information on referencing a record in your post, please refer to the Referencing Users and Records section.

The following steps will cover adding an external link to the Home page activity stream as an example:

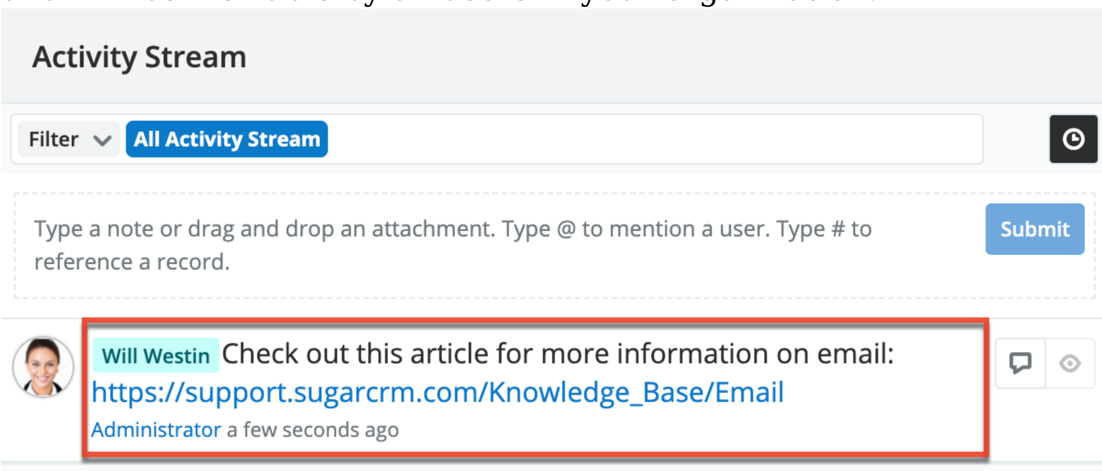
1. Go to an external site (e.g., www.support.sugarcrm.com) then select a link (e.g., Clearing Browser Cache article) you wish to add to your post.
   Note: The actual link will popup when you click the link on the site and drag it across the page.



2. Drag and drop the link into the post input box on your Home page activity stream then click "Submit".



The external link will now display in the post on the Home page activity stream and will be viewable by all users in your organization.

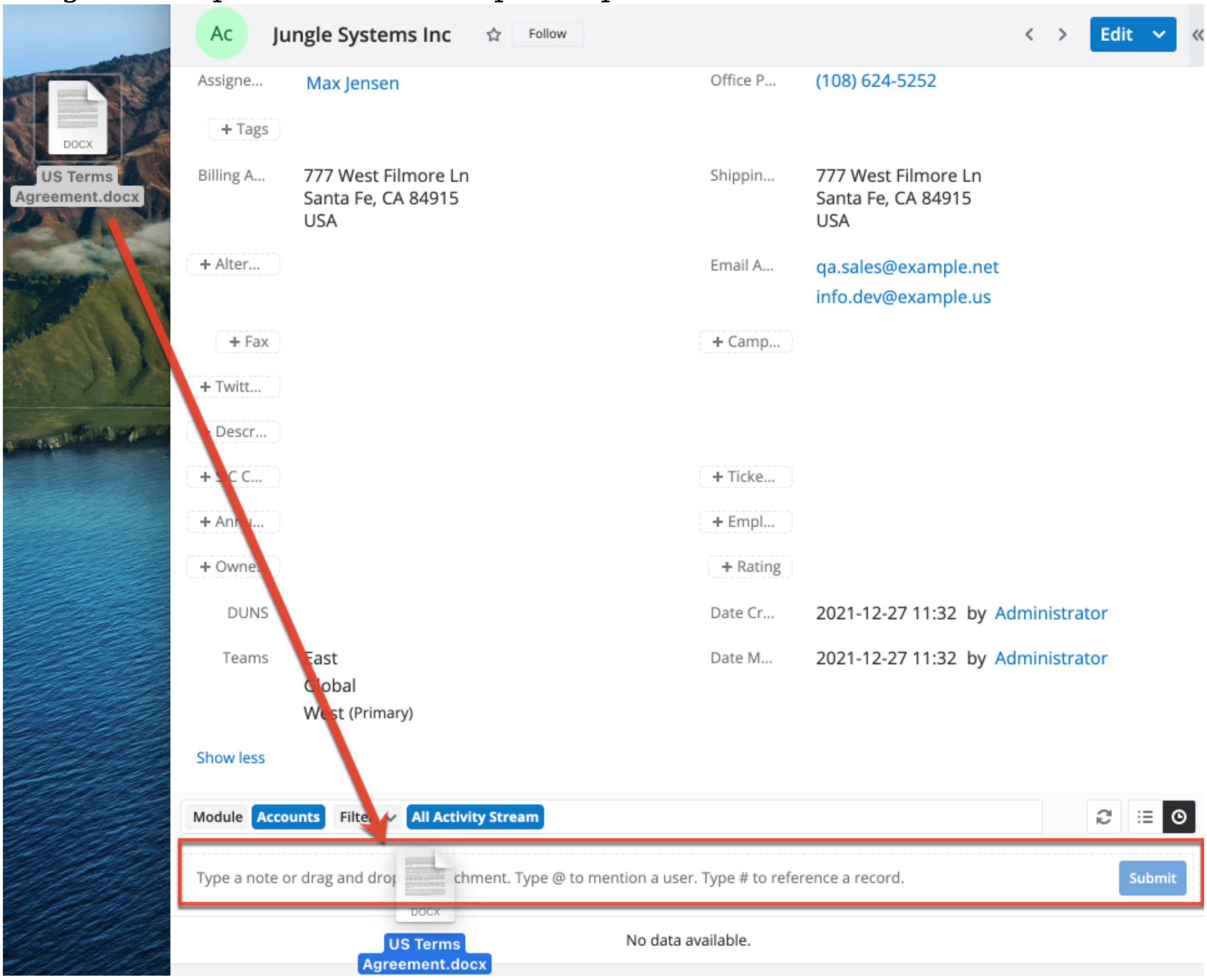


Adding Attachments

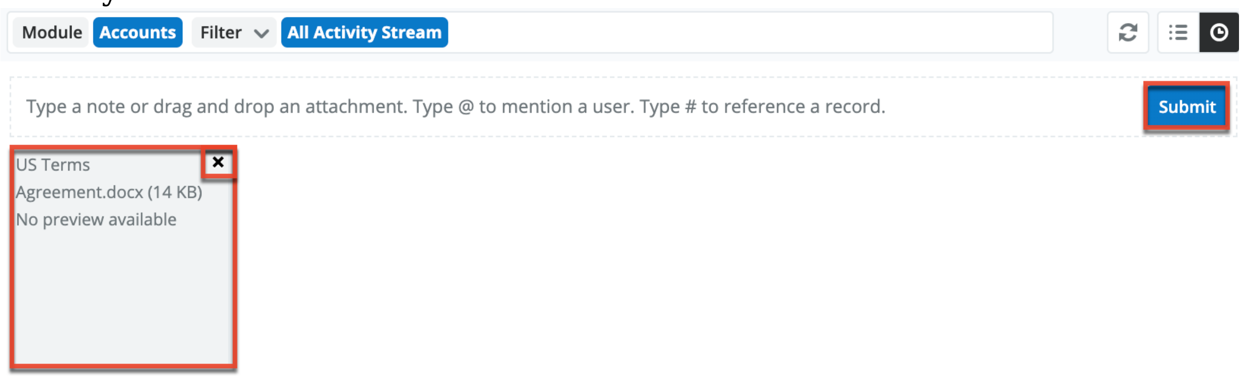
Users can also drag and drop files such as PDFs, .doc files, .csv files, and image files directly from their local machine (e.g., desktop) into the post input box to share documents related to records with other users.

The following steps will cover adding a file from your desktop to the account record view's activity stream as an example:

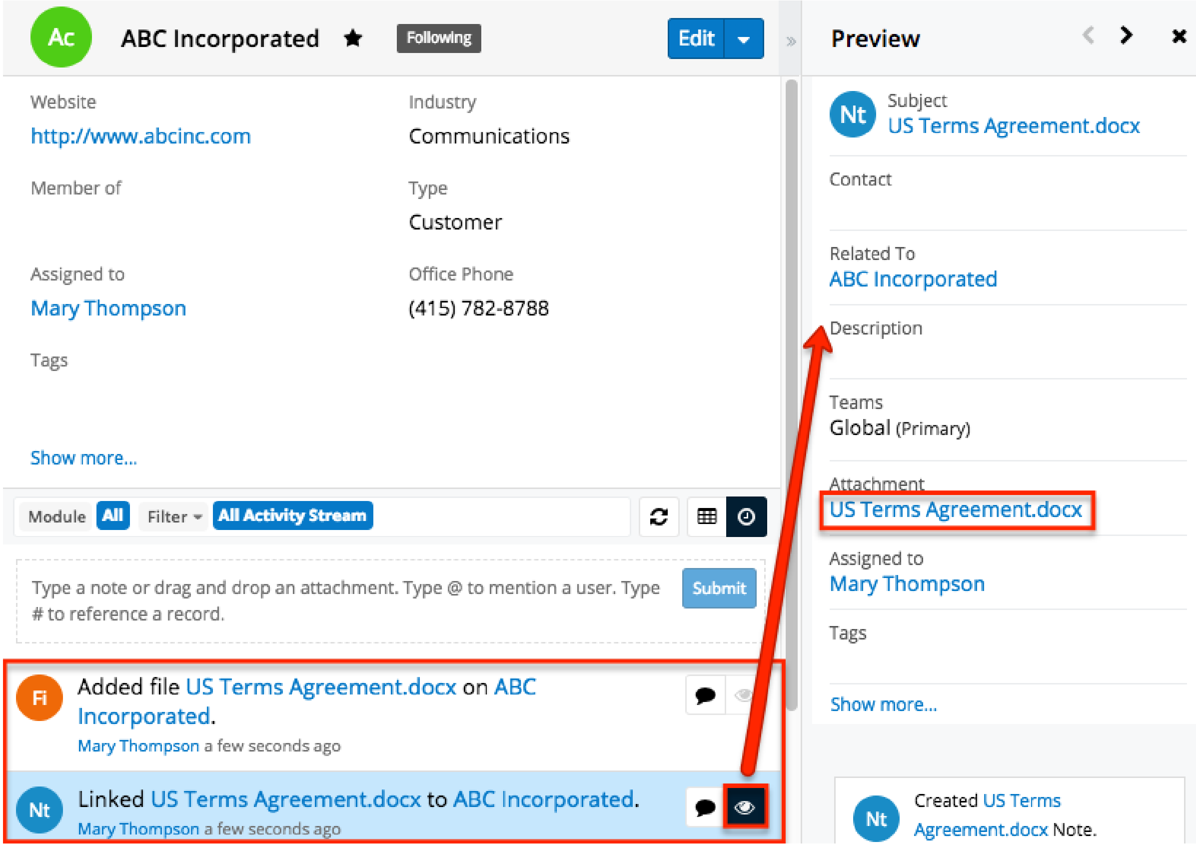
1. Locate the file on your desktop that you wish to attach to a post.
2. Drag and drop the file into the post input box.



3. The attached file(s) will appear below the post input box. You may choose to enter a message simultaneously, which will appear as a separate comment-type post in the activity stream. To remove an attachment, click the "X" on the file's placeholder. Click "Submit" to post the file to the activity stream.



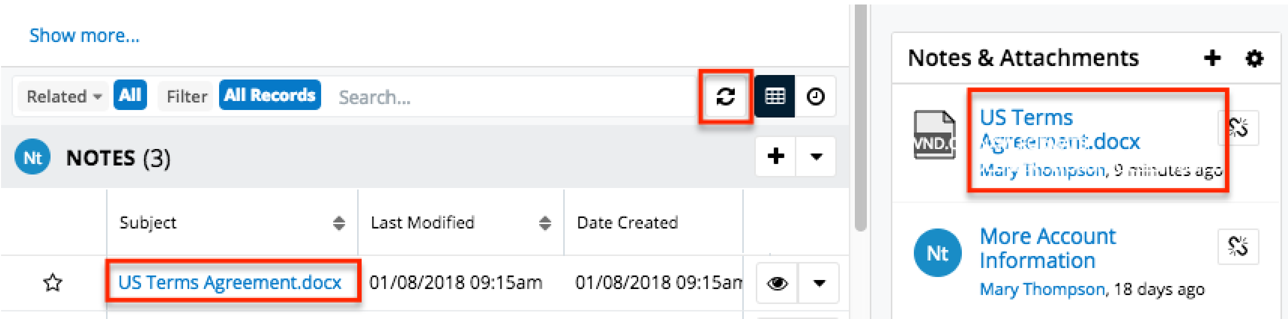
You may drag and drop more than one file into the post input box, but please note that each file will generate two posts in the activity stream: one post showing the file item ("Fi" icon) and another linking to the note record ("Nt" icon) in Sugar where the file is stored. You can preview the note record in the intelligence pane by clicking the Preview button to the far right of the note activity stream post. Click the file name in the preview's Attachment field to instantly download the file to your local machine.



The newly created note record will appear in the Notes & Attachments dashlet in the account record view's intelligence pane as well as the related Notes subpanel. If the Notes & Attachments dashlet is not displayed in the intelligence pane, you can add the dashlet by editing the dashboard. For more information on adding dashlets, please refer to the Adding Dashlets section of the Dashboards and Dashlets documentation.

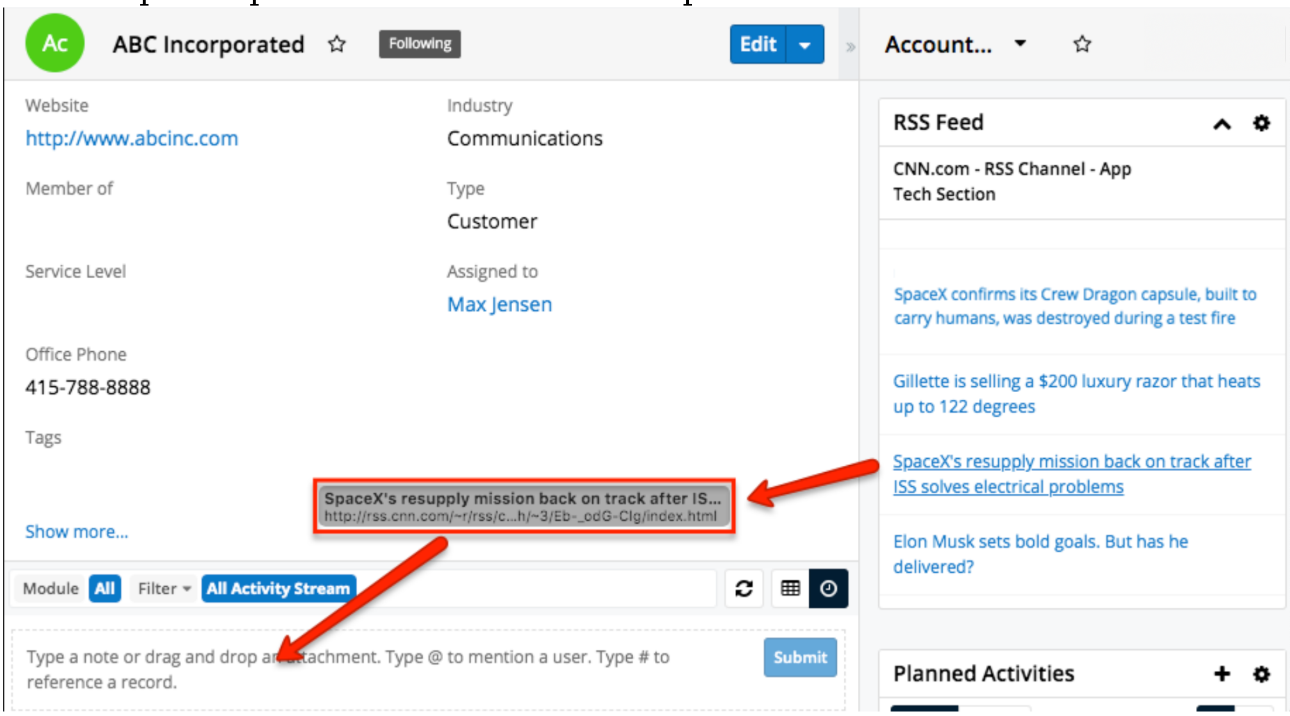
When posting an attachment to the activity stream, if you choose to also include a comment, any related records mentioned in the comment will not form a relationship with the note record or uploaded file.

If a new note is created via the Notes subpanel or Notes & Attachments dashlet, an activity stream post will be created indicating that a new note was linked to the record. Please note that, when a note is created or linked via the Notes & Attachments dashlet, you must refresh the activity stream or subpanel view in order to view the corresponding record.



Adding via Dashlets

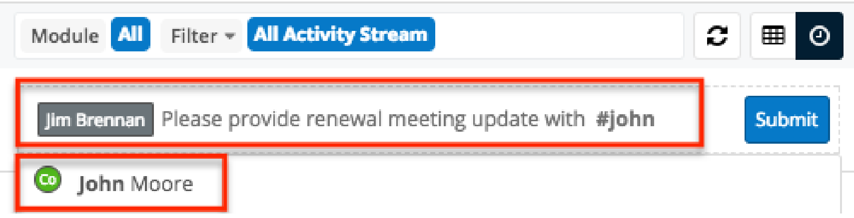
Users also have the option to drag and drop news feeds directly from the RSS Feed dashlet into user posts. The [RSS Feed dashlet](#) can be added to the list view and record view's intelligence pane dashboard. For more information on adding dashlets to the intelligence pane, please refer to the [Dashboards and Dashlets](#) documentation. Once the dashlet is added and configured, simply click the specific news article from the RSS Feed dashlet then drag and drop the link that appears into the post input box. Click "Submit" to post the RSS feed link.



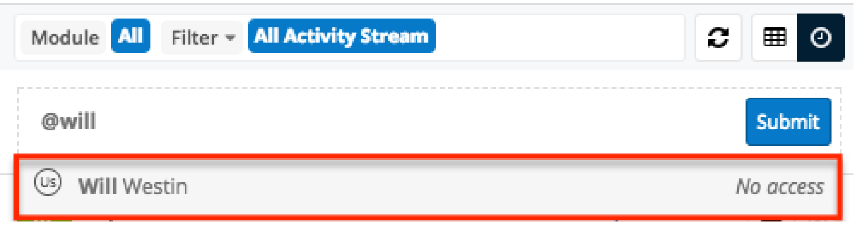
Referencing Users and Records

Sugar records and users can be referenced within the user post if you wish to target the message to a specific user or relate the post to a specific record. To mention a user in your post, type @ followed by the user's name (e.g., @John

Smith). Please note that even if a specific user is referenced, all users will be able to view the post in Sugar if the post originated from the Home page activity stream. If the post originated from the list view or record view activity stream, then only the specific user mentioned in the post will be able to view the message on their Home page activity stream. To reference a record in your post, type # followed by the record's name (e.g., #john). Please note that only modules enabled for full-text search via Admin > Search can be referenced in posts. For more information on how to enable modules for full-text search, please refer to the System documentation in the Administration Guide. Posts that reference a specific record in Sugar will appear in that record view's activity stream. Users can access the referenced record and user by clicking the highlighted record or user name within the post. Please note that you can reference more than one user and record in the same post.



As you type in the record name or user name, the type-ahead feature will begin to display matching results below the post input box. Simply select one of the matching users or records from the list then click "Submit" to post your message. Please note that a user must have view access to the record in order for you to be able to mention them when posting via the record view's activity stream. For example, if user Will Westin does not have access to view ABC Company, you cannot reference Will (e.g., @will) when posting a message via the ABC Company record view's activity stream. If you try to mention a user without view access, their name will be displayed in gray in the results list with a message stating that they have no access.

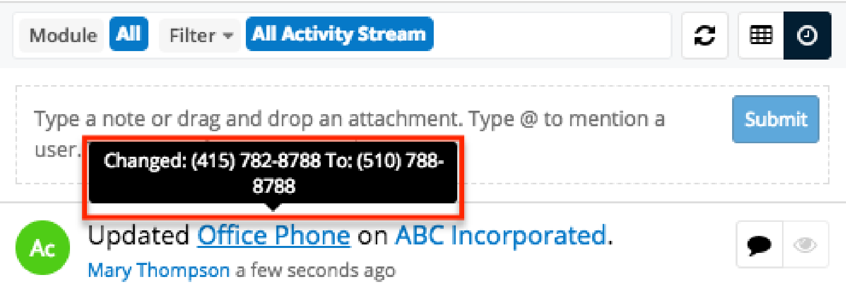


Please note that you cannot preview users or records referenced in the post as the preview is disabled. You will get an error message (Preview disabled: No data available) when you hover on the Preview button to the right of the post. For more information on previewing posts, please refer to the Previewing Posts section.

Viewing Field Changes

Fields in Sugar that are marked as "Audit" via Admin > Studio will generate update posts in the activity stream whenever the field gets updated. For more information on marking fields for audit, please refer to the Studio documentation in the Administration Guide. Please note that only audited fields will generate an update post in the activity stream.

Updates you make to audited fields in the record view will generate a post in the record view activity stream referencing the field name(s) that was updated (e.g., "Updated Office Phone on ABC Incorporated"). When you hover on the field's name within the update post, the old and new values will display above the post.



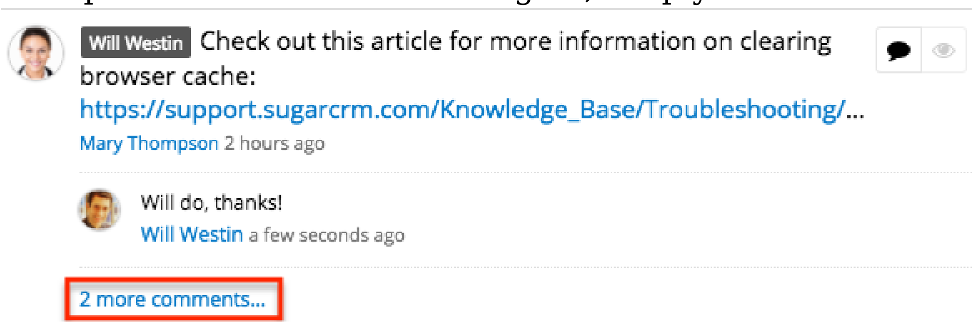
You will also be able to view the update post via the Home page and List View activity stream if you follow the record in Sugar. For more information on following records, please refer to the Following Records section.

Please note that users who do not have access to view the audited field due to a role restriction will see a generic update post (e.g., Updated ABC Incorporated) on their activity stream as the field name will not be mentioned. For more information on roles, please refer to the Role Management documentation in the Administration Guide.

Commenting on Posts

Users can respond to posts via the activity stream by clicking the Comment button to the right of each post. A comment box will appear below the post and you can type in your message then click "Reply" to post your comment. All associated comments will appear below the post in the activity stream and will display the timestamp of the comment along with the user's name who added the comment. You can mention a specific user by typing @ followed by the user's name (e.g., @Sarah Smith) or reference a specific record by typing # followed by the record's name (e.g., #ABC Company). For more information on referencing users and records in your post, please refer to the Referencing Users and Records section. Please note that comments are visible to all users in Sugar unless they are no longer following the record. For more information on unfollowing records, please refer to the Unfollowing Records section.

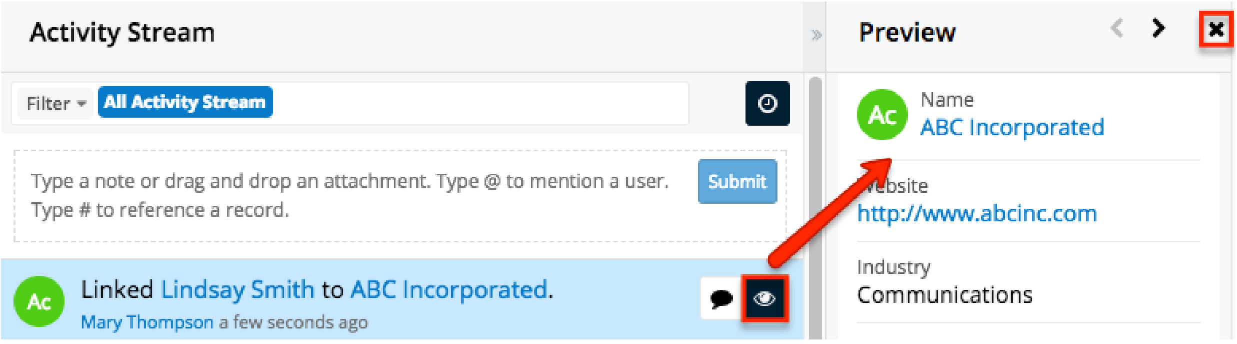
When a user comments on a post, that post will move to the top of the activity stream once the page is refreshed. Please note that comments you add on the List View activity stream will appear on the Home page activity stream and vice versa if the post exists in both places. When there are multiple comments, the latest comment will appear on top and users can click the more comments link (e.g., 2 more comments...) to view all comments associated to the post. Once you click the link, all comments will display in cascading order with the most recent comments on top. To hide the comments again, simply refresh the activity stream page.



Previewing Posts

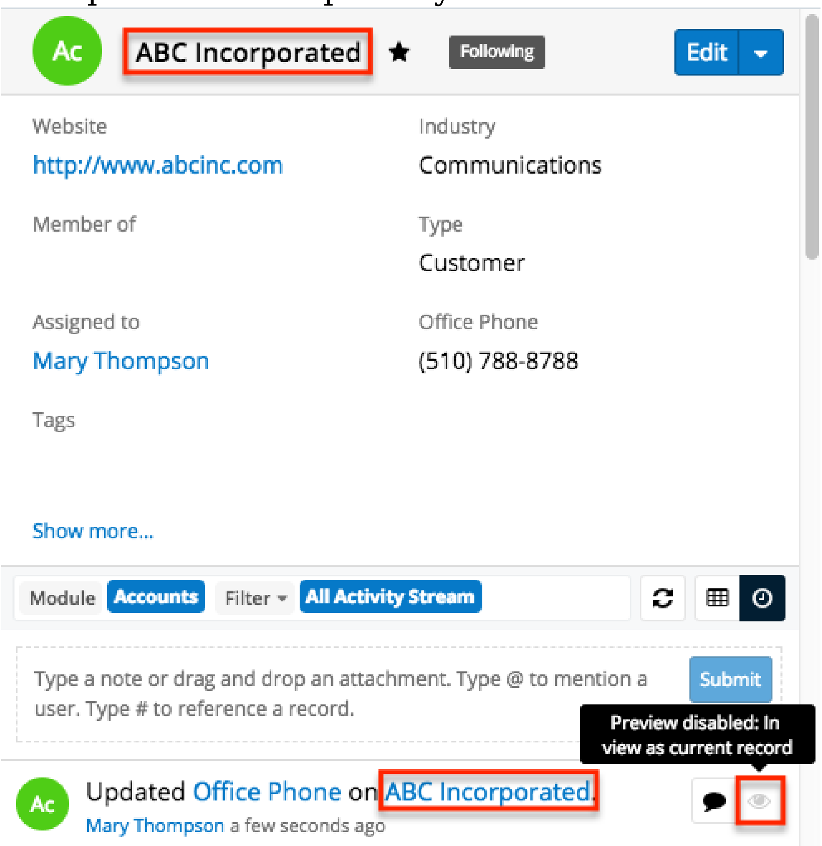
Users can preview activity stream posts by clicking the Preview button to the far right of the post. The intelligence pane will display the record's details with key information regarding the record as well as any related activity stream information. Please note that preview is available for Create, Update, Link, and Unlink-type posts in the activity stream. To close the preview, simply click the "X" on the upper right of the intelligence pane.

Also, messages posted via the Home page or List View activity stream cannot be previewed as records are not automatically referenced within the post. The Preview button will be grayed out and display a message ("Preview disabled: No data available") when you hover on the button. Messages posted via the record view can be previewed on the Home page and List View activity stream since the record is automatically referenced within the post. For linked and unlinked type posts, only the primary record that is linked or unlinked to can be previewed via the intelligence pane. For example, the below post states that Lindsay Smith is now linked to ABC Incorporated. Since ABC Incorporated is the primary record that the contact is now linked to, the account record will display when previewing the post.



Please note that records for modules using the Legacy user interface cannot be previewed if included in the post (e.g., Link-type post) and will generate an error message ("Legacy modules cannot be previewed") when you hover on the button. For more information on the Legacy user interface, please refer to the [User Interface (Legacy Modules)]() documentation.

Also when you are viewing a record in record view, you cannot preview a post that references the same record. For example, if you are viewing ABC Incorporated's record view and there is an update post referencing ABC Incorporated in the record view's activity stream, you will not be able to preview any posts where ABC Incorporated is the primary record.



Last Modified: 2021-12-27 18:25:31

Accessibility

Overview

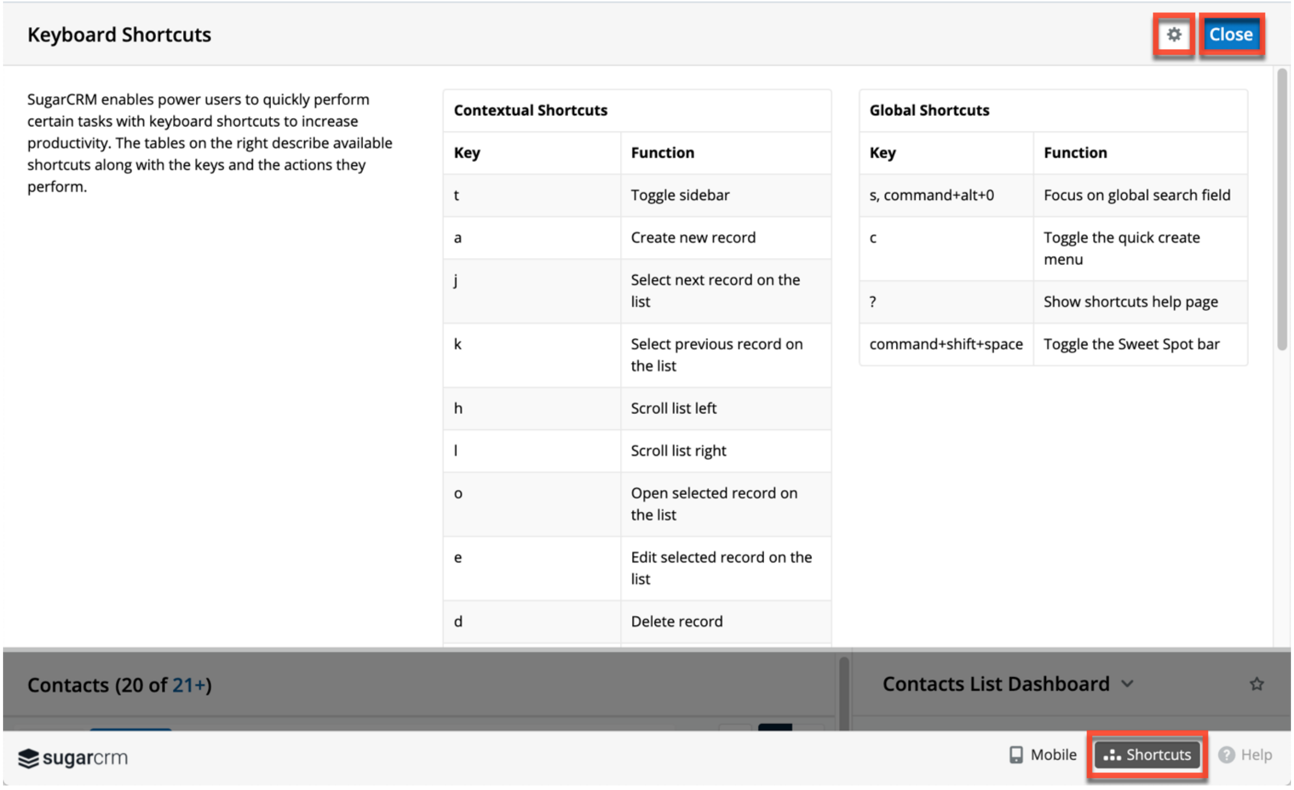
Sugar enables users to quickly perform certain tasks using keyboard shortcuts to increase productivity and accessibility. Keyboard shortcuts can be used to navigate around the list view and record view layouts for Sidecar modules, allowing users quickly select records, inline edit records, preview records, etc. There are also global shortcuts available to perform tasks such as toggling the Quick Create menu, entering the Global Search field, etc. Users can also customize the key combinations which activate each shortcut.

This documentation will cover the various keyboard shortcuts available as well as how to navigate around Sugar using your keyboard. For more information regarding accessibility for Sugar, please refer to the [Accessibility](#) information.

Shortcut Keys

There are various shortcut keys available to easily perform actions in Sugar using your keyboard. You can use the shortcut keys to favorite a record, delete records, etc. in the Sidecar module's (e.g., Accounts, Contacts) list view and record view layouts. In addition, the global shortcuts can be utilized throughout the user interface to perform actions such as opening the Quick Create menu, accessing the Global Search field, etc.

You can access the Keyboard Shortcuts help page by either hitting the Shift and / key or clicking the Shortcuts link in Sugar's footer. The help page will display a table with the various shortcut keys available to use along with a description of the actions they perform. The shortcuts displayed are contextual based on what you are currently viewing in Sugar. For example, if you are viewing the Mass Update panel in the Accounts list view, then the Keyboard Shortcuts page will display shortcuts that specifically apply to this panel. Simply hit "Esc" on your keyboard or click the Close button if you wish to exit the page. You can also [customize](#) the key combinations for each shortcut by clicking the Gear button.



Global Shortcut Keys

The global shortcut keys can be used to perform the following actions in Sugar's user interface:

Windows/Linux Key	Mac Key	Function
c	c	Toggle the Quick Create menu.
esc, ctrl+alt+l	esc, cmd+alt+l	Exit the Global Search field.
s, ctrl+alt+0	s, cmd+alt+0	Access the Global Search field.
t	t	Toggle the intelligence pane in list view and record view.
ctrl+shift+space	cmd+shift+space	Toggle the Sweet Spot bar.

List View Shortcut Keys

The list view shortcut keys can be used to perform the following actions in the module's list view layout:

Windows/Linux Key	**Mac Key**	**Function**
+	+	Add field rows in the Mass Update or Filter panel.
-	-	Remove field rows in the Mass Update or Filter panel.
a	a	Create new record.
ctrl+a	cmd+a	Select all records displayed on current set of list view results.
ctrl+s, ctrl+alt+a	cmd+s, cmd+alt+a	Save record.
d	d	Delete record or custom filter in list view.
e	e	Edit selected record in list view.
esc, ctrl+alt+l	esc, cmd+alt+l	Exit out of certain elements (e.g., inline edit) in the list view.
f+a	f+a	Mark selected record as a favorite. **Note**: Hit "f+a" again to remove the record as a favorite.
f+c, ctrl+alt+8	f+c, cmd+alt+8	Create a new list view filter.
f+e	f+e	Edit custom list view filter.
f+i, ctrl+alt+9	f+i, cmd+alt+9	Place cursor in list view search box.
f+m	f+m	Open the list view filter menu.
f+o	f+o	Mark selected record to follow or unfollow.
h	h	Scroll list to the left.
j	j	Select the next record on the list view.

k	k	Select the previous record on the list view.
l	l	Scroll list to the right to view additional fields in the list view.
m	m	Open the mass actions menu. **Note**: Menu opens once at least one record is selected.
o	o	Open the selected record's (e.g., ABC Company) record view.
p	p	Preview the selected record.
r	r	Clear filter values.
t	t	Toggle the intelligence pane.
x	x	Mark the checkbox to the left of each selected record in list view.

Record View Shortcut Keys

The record view shortcut keys can be used to perform the following actions in the module's record view layout:

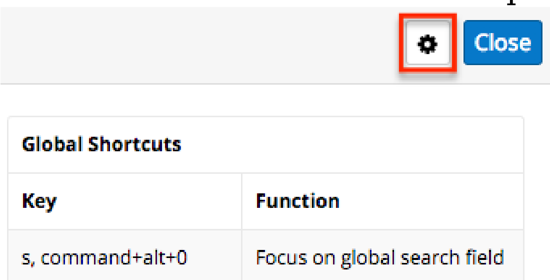
Windows/Linux Key	Mac Key	Function
ctrl+s, ctrl+alt+a	cmd+s, cmd+alt+a	Save the record.
d, ctrl+alt+d	d, cmd+alt+d	Delete the record.
e, ctrl+alt+i	e, cmd+alt+i	Edit the record.
esc, ctrl+alt+l	esc, cmd+alt+l	Exit out of certain elements (e.g., edit view) in the record view.
f+a	f+a	Mark record as a favorite. **Note**: Hit "f+a" again to remove the record as a favorite.

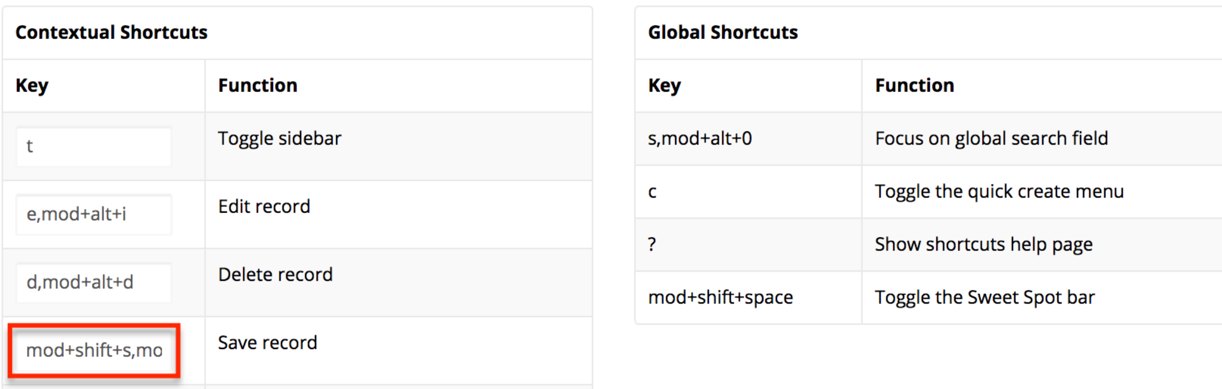
f+o	f+o	Mark record to follow or unfollow.
h	h	Open the previous record.
l	l	Open the next record.
m	m	Open the record's Actions menu.
shift+c, ctrl+alt+u	shift+c, cmd+alt+u	Copy the current record.
t	t	Toggle the Right Hand Side drawer.

Customizing Shortcut Keys

You can customize the key combinations which activate each shortcut. This is especially useful if you use the default key combinations for other functions such as typing special characters.

Use the following steps to customize the shortcuts' key combinations:

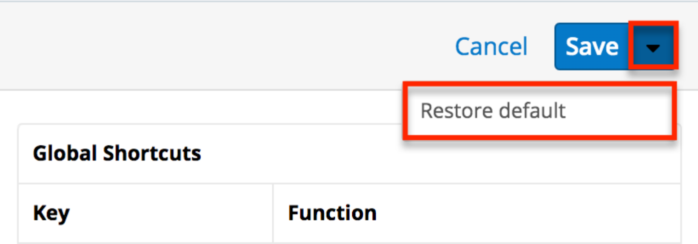
1. Access the Keyboard Shortcuts page by clicking the Shortcuts link in Sugar's footer.
2. Click the Gear button on the top right of the page.


3. Update the Key value you want to change in the Contextual Shortcuts table.


Note: Depending on your operating system, the "mod" which appears in

key combinations will be the Control key (for Windows and Linux computers) or the Command key (for Mac). Use "mod" to indicate the use of these keys.
4. Click "Save" to preserve your changes.

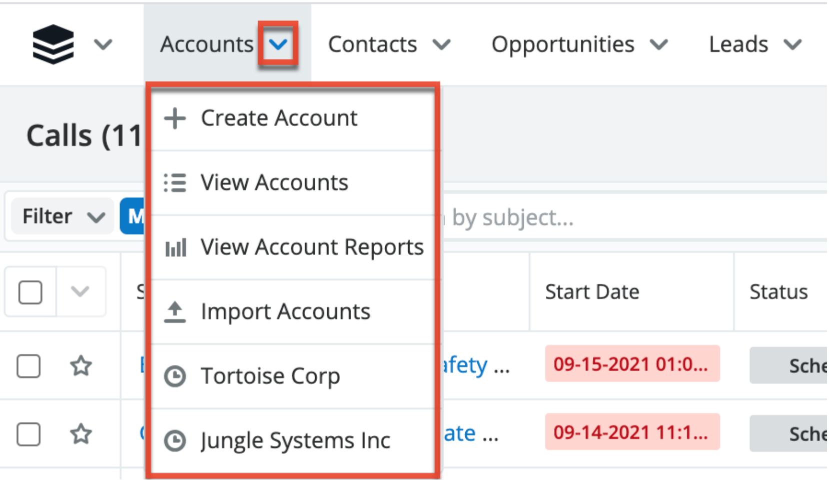
If you ever wish to revert all of your custom key combinations, click the "Restore default" option in the actions menu.



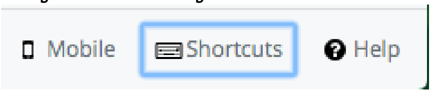
Since the Keyboard Shortcuts page shows contextually appropriate shortcuts, repeat these steps on various Sugar views in order to access all of the shortcuts.

Tabbing in Sugar

Using the Tab key (Alt+Tab for Safari browser) on your keyboard enables you to easily navigate through Sugar's navigation bar which spans across the top of the screen. Please note that the default tab order is from left-to-right. As you hit the Tab key, each option (e.g., home, module tabs, global search, notifications, etc.) on the navigation bar will be highlighted in blue, and you can press "Enter" if you wish to access the module's list view, actions menu, notification's page, etc. For example, if you press "Enter" on the triangle in the Accounts module tab, the corresponding actions menu will open and you can use the Up and Down arrow keys on your keyboard to select an option (e.g., Create Account, View Accounts, etc.). If you hit "Tab" again while the module tab's Actions menu is open, you will navigate to the next option (e.g., Contacts) on the navigation bar and the current actions menu will close.



In addition, you can continue to tab outside of the navigation bar to highlight and access certain elements (e.g., Create button, Search box, Intelligence Pane, etc.) of the home page, list view, record view, etc. For example, if you continue tabbing after you get to the end of the navigation bar while viewing the Accounts list view, the tab will move onto the various elements on the page highlighting buttons, actions menu, account names, etc. You can simply hit "Enter" if you wish to perform a specific action (e.g., create a record, open the actions menu, etc.) on the list view. The tab will go through all of the currently displayed records on the list view then move onto the intelligence pane and footer before going back to the navigation bar again. Please note that each link (e.g., Mobile, Shortcuts) in Sugar's footer will be highlighted as you tab from left-to-right. Simply hit "Enter" on your keyboard if you wish to access any of the links on the footer.



Tabbing in Global Search

As you tab through Sugar's navigation bar, you will access the Global Search bar where you can perform a search across the entire Sugar database. Once you enter in a search term, you can use the Up and Down arrow keys on your keyboard to navigate through the quick search results and hit the Tab key to close the Quick Search Results list and return to the search bar. In addition, you can also tab through the View All Results page to highlight and access certain elements (e.g., Search box, Intelligence Pane, Preview button, etc.) of the page as well. For more information on navigating through global search using your keyboard, please refer to the Search documentation.

Last Modified: 2021-12-20 20:35:05

Doc Merge

Overview

Doc Merge pulls data from Sugar records into professional-quality documents such as contracts, quotes, NDA agreements, form letters, and labels. Through custom templates that you design according to your needs, Doc Merge has the ability to extract data from all Sugar Sidecar modules and their related modules into individual or multiple digital documents within minutes. This powerful feature will save you time producing common documents natively within Sugar while linking these documents to Sugar records for future reference.

Doc Merge is available out-of-the-box with Sugar Sell and Serve licenses. Doc Merge includes the following features:

- Generate DOCX, XLSX, PPTX, and PDF documents without leaving Sugar.
- Merge information from any Sugar module into the document, including related modules.
- Merge multiple records into one document for label generation.

- Template Assistant tool helps you find the fields and data you want to include in your merged documents.

- Merged documents are attached to the Sugar record as a linked document.
- Doc Merge Widget is available in the footer to provide links to merged documents and access to the Template Assistant.
- Initiate merges from record view, list view, and subpanel action menus.

Topics

This documentation is organized into the following sections:

Prerequisites

To use the Doc Merge feature, you need the following:

- You must be a licensed Sugar Sell or Sugar Serve user with role access to the Documents, Document Merges, and Document Templates modules.
- You must allow pop-ups in your browser settings to use the Doc Merge Template Assistant.
- You need access to software that produces DOCX, XLSX, and PPTX files to

create document templates.

Terminology

The following terms are used in this documentation:

- **Doc Merge**: The name of the feature that enables the merging of Sugar record data with DOCX, XLSX, and PPTX files.
- **Document Merge**: The process of merging record data into a DOCX, XLSX, or PPTX template.
- **Merged Document**: The DOCX, XLSX, PPTX, or PDF document that results from merging record data with the document template. The Merged Document is stored in Sugar in the Documents module.
- **Template**: The DOCX, XLSX, or PPTX file containing the merge codes that represent the Sugar fields to be merged into the resulting document.
- **Widget**: The tool that is accessible in the Sugar footer, which contains links to merged documents and access to the Template Assistant.

Suggested Settings

We recommend making the following admin configurations to your Sugar instance to optimize the user experience.

Note: You must be a system administrator to complete the following configurations.

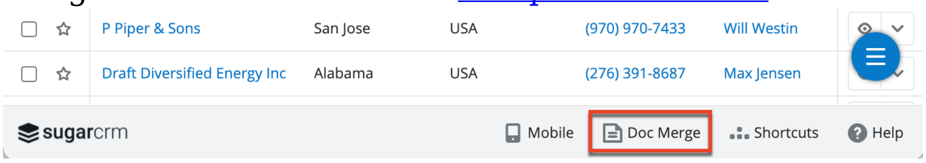
- **Unhide the Document Templates module**: The Document Templates module is hidden by default. While you can create and select templates without making the module visible, you may want to remove the module from the hidden modules list via Admin > Display Modules and Subpanels for easier template access.
- **Add hidden fields to layouts**: Add the following fields to layouts for the Document Templates module in Admin > Studio:
    - Add "Extension" to the Record View, List View, and Search layouts.
    - Add "Template Module" to Popup List View layout.
- **Create a role for users who will have access to the Doc Merge functionality**: Most customers will want users to be able to access each other's templates (team permitting), but only edit or delete their own. To create a role that restricts users from editing or deleting other users' templates, create a new role via Admin > Role Management with the following settings:
    - **Role Name**: Doc Merge Users
    - **Field Permissions**: From the fields list for the Document

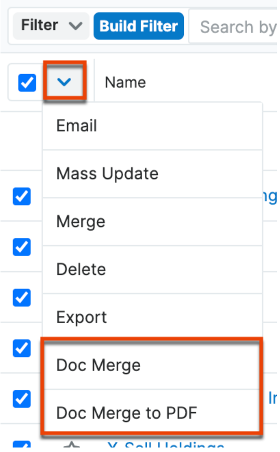
Templates module, set the Extension field to "Read Only". Do not skip this step; it is very important that users do not edit this field.
    - **Module Permissions**: For the Document Templates module, set the following permissions:
        - **Access**: Enabled
        - **Access Type**: Normal
        - **Delete**: Owner
        - **Edit**: Owner
        - **List**: All
        - **Record View**: All

After saving the new role, scroll to the role's Users subpanel and add all users who will have access to Doc Merge. By default, all users in Sugar can access Doc Merge unless they have been restricted by role, as explained in the [Restricting Access to Doc Merge](#) section.

Accessing Doc Merge

The Doc Merge feature is accessible in the following locations:

- **Sugar Footer**: The [Doc Merge widget](#) in the footer provides access to merged documents and the [Template Assistant](#).


- **Actions Menus**: "Doc Merge" and "Doc Merge to PDF" options are available in [List view](#), [Record View](#), and [Subpanel](#) action menus for supported modules.


Additionally, your administrator may have added Doc Merge action buttons to records. Please refer to the Action Buttons documentation in the Administration Guide for more information on creating action buttons.

Restricting Access to Doc Merge

The administrator may choose to disable access to Doc Merge for some users. To do this, simply create a role with the Access level for both the Document Merges and Document Templates modules set to "Disabled" and then add the restricted users to the role. For more information on creating roles in Sugar, refer to the Role Management documentation in the Administration Guide.

Creating a Merged Document

Creating a merged document includes the following steps:

1. Create a template if it does not already exist.
2. Merge records with the document template.

Creating a Doc Merge Template

Doc Merge templates are DOCX, XLSX, or PPTX documents that include Sugar field references. While you can create templates manually by identifying the system labels for Sugar fields embedded in curly braces (e.g., {first_name}), using the Doc Merge Template Assistant is the easiest method for creating templates. This section explains how to create templates using the Template Assistant.

To create a template:

1. Create a blank DOCX, XLSX, or PPTX document in your preferred software application. When records are merged with the template using the "Merge to Doc" option, the output will be in the same format.
2. Leaving the window with the blank document open, launch the Template Assistant by clicking the Doc Merge widget in Sugar's footer. The Template Assistant opens in a new window (not in your current browser tab).
3. One by one, copy the desired fields from the Template Assistant to your clipboard as described in the Working with the Template Assistant section of this page, and then paste the fields into your blank document.
4. Save the document in DOCX, XLSX, or PPTX format. Do NOT save the file in a native template format (e.g., DOTX, XLTX, POTX).

{!date format='MM-DD-YYYY'}

{first_name} {last_name}

{title}

{name}

{primary_address_street}

{primary_address_city}, {primary_address_state} {primary_address_postalcode}

Dear {first_name},

Please enjoy our sample Doc Merge form letter!

Sincerely,

{assigned_user_name}

Uploading the Template

After creating the Doc Merge template, you must upload it to Sugar's Document Templates module using one of the following methods:

- Create a new Document Template record in Sugar. Please refer to the Document Templates Module section for more information.
- Alternatively, you may upload the document template when you initiate the merging of a record; refer to Step 3 in the section below.

Sugar will check the file for compatibility when you upload it. Attempting to upload an unsupported file type will produce an error and the Document Template record will not save.

Merging Records with a Document Template

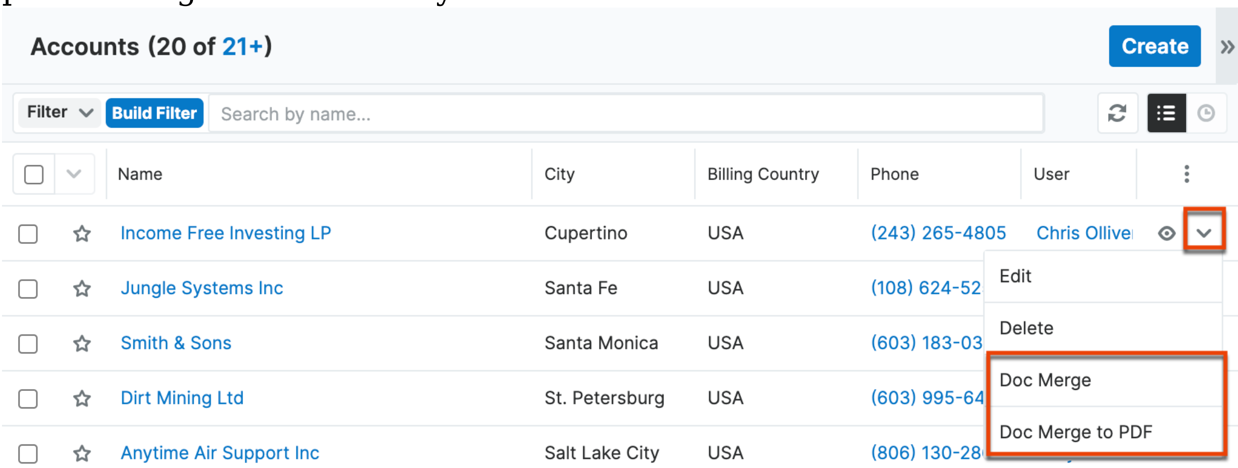
You can either merge individual records or multiple records simultaneously into one document.

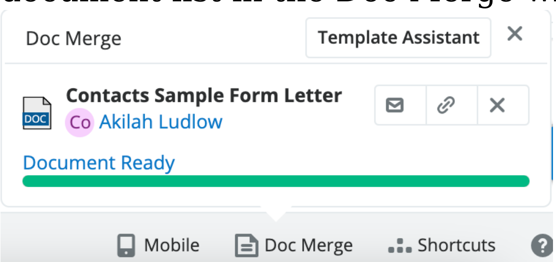
- [Merging Individual Records](#)
- [Merging Multiple Records](#)

Note: A merge can also be triggered by a SugarBPM process. For more information, refer to the SugarBPM > Process Definitions documentation.

Merging Individual Records

Merge individual records with a document template from record view, list view, or a subpanel's Actions menu. You can use DOCX, XLSX, and PPTX file templates when merging individual records.

1. From a record, list view, or subpanel Actions menu, select "Doc Merge" or "Doc Merge to PDF".
2. Select a document template in the Search and Select drawer, or click the Create button to create a new template. Please refer to the Common Actions section for more information. When using the "Doc Merge to PDF" option, you must select a DOCX file template in this step. The merge process begins immediately.


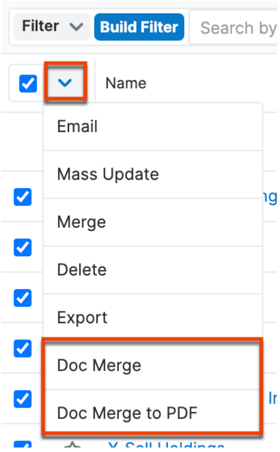
The status of the merge displays in the Doc Merge widget. When complete, a confirmation message displays, and the merged document is added to the document list in the Doc Merge widget and in the Documents module.


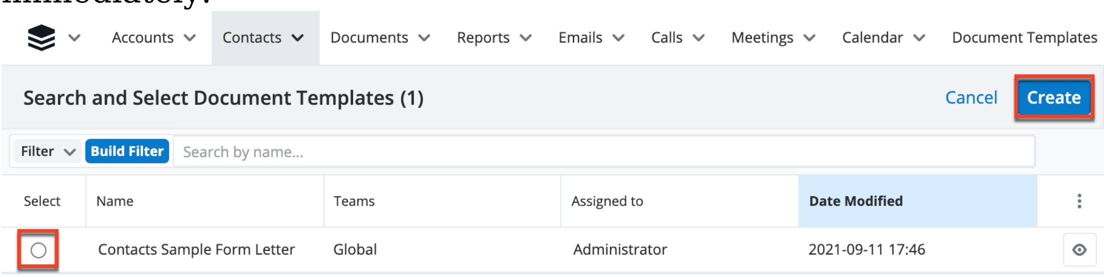
3. Click the document icon to download the merged document. For more options, please refer to the Accessing Merged Documents section.

Merging Multiple Records

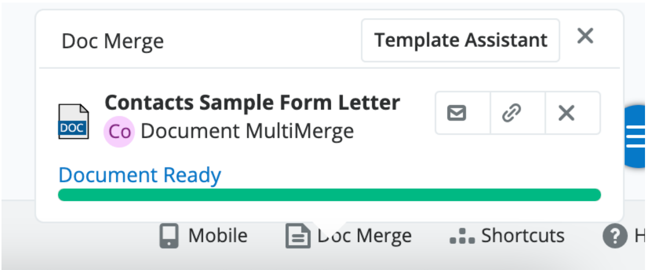
Merging multiple records allows you to either create a single document with a separate page for each record merged (e.g., mail merge letter), or populate formatted pages (e.g., tables) with fields from multiple records (e.g., shipping labels). To create labels, the Label Merging field must be enabled in the Document Template record. Please refer to the Creating Mailing Labels from Sugar Records article for more information.

Follow these steps to mass-merge many records at once. Remember, the output's layout will be subject to the state of the template's Label Merging field.

1. Select the records to merge in list view.
2. Expand the Mass Actions menu and select "Doc Merge" or "Doc Merge to PDF". When merging multiple records, if you select "Doc Merge", you will only be permitted to output a DOCX format.


3. Select a document template in the Search and Select drawer or click the Create button to create a new template. The merge process begins immediately.


4. The status of the merge displays in the Doc Merge widget. When complete, a confirmation message displays, and the merged document is added to the document list in the Doc Merge widget and in the Documents module.



5. Click the document icon to download the merged document. For more options, please refer to the [Accessing Merged Documents](#) section.

The field values from the records are merged with the document template:

sugarcrm

09-11-2021

Gerardo Plante

President

Anytime Air Support Inc.

345 Sugar Blvd.

Santa Monica, CA 47476

Dear Gerardo,

Please enjoy our sample Doc Merge form letter!

Sincerely,

Sally Bronsen

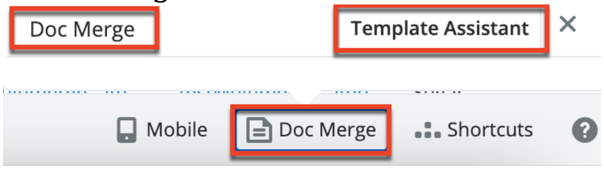
Accessing Merged Documents

After merging records with a document template, you can access the merged documents using one of the following methods:

- Click the document's link in the Doc Merge Widget to download the document.
- Click the "Document Ready" link in the Doc Merge Widget to open the document's record in the Documents module.
- If you initiated the merge from a single record, you can access the document from that record's Documents subpanel.
- Navigate directly to the Documents module to locate the merged document.

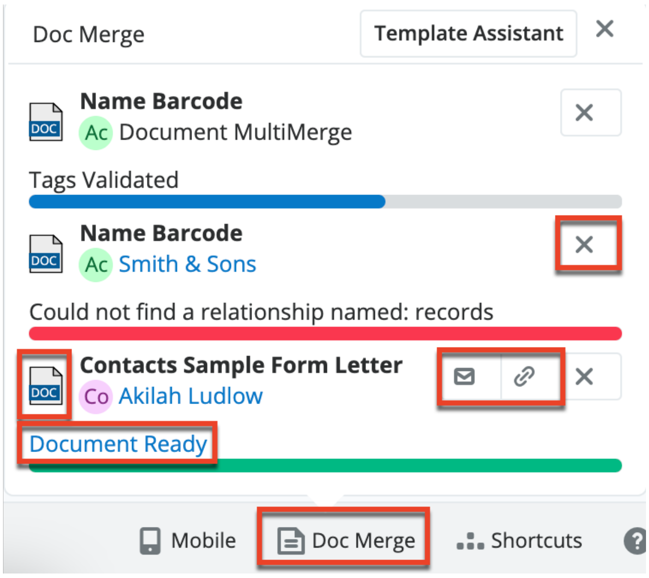
Doc Merge Widget

The Doc Merge widget in the footer provides access to your merged documents through the widget's Document List and the Template Assistant, where you can select Sugar record fields and other data to build your template.



Widget Document List

The widget's Document List stores a list of merged documents and those still in progress, with status indicators and links to completed documents. Documents are only displayed for the user who initiated the merge, and they persist in the Document List until manually removed, even across multiple sessions. If an error is encountered while processing a document merge, errors are displayed below the name in the Document List and it is identified by a red bar.



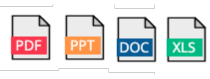
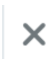
Note: If a user's session ends while a merge is in progress, the merge will continue to process and the status will be updated in the widget in the user's next session.

The Document List provides the following functions:

- A list of all merged documents for the current user
- Links to each merged document in Sugar
- Links to download each merged document to your local computer in its

native format (DOCX, XLSX, PPTX, PDF)
- Send a link to an assignment notification
- Quick access to email the document
- Delete documents from the list

Document List Elements

Element	Function
Document Ready	Opens the merged document in the Documents module. To locate a document that you have removed from your Document List, navigate to the Documents module or, if it was a single-record merge, to the record's Documents subpanel.
	Downloads the merged document from the Document List.
	Emails a merged document from the Document List as an attachment. The configured email client opens with the document attached. After sending the email, it is added to the record's Emails subpanel.
	Adds a notification record with a link to the merged document in the Notifications module. In the Search and Select drawer, select the names of recipients for the notification and then click the Select button.
	Removes the document from the Document List. This does not delete the document from Sugar, it only removes it from the Document List in the Doc Merge widget. To fully delete a merged document from Sugar, you must delete it from the Documents module. Removing a document from the list while a merge is in progress does not stop the merge processing, it only removes it from the list.

Template Assistant

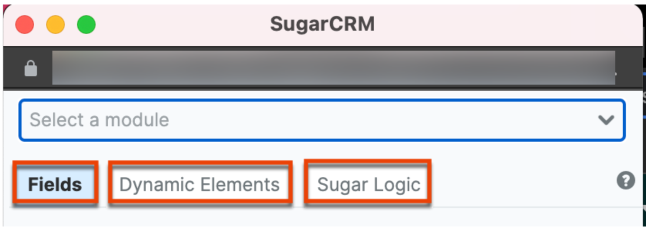
The Template Assistant, accessed from the top of the Doc Merge Widget, facilitates creating Document Templates by allowing you to select module fields from Sugar and copy them to your system clipboard for use in a DOCX, XLSX, or PPTX file. Once open, the Template Assistant window is intended to be left open next to a window with the document template file in its native editing environment so you can easily copy and paste the field codes into the document template.

The Template Assistant helps you complete the following tasks:

- Find and select fields to copy into your template document file.
- Insert lists or tables of data from related Sugar records.
- Place a custom-formatted date stamp in your template.
- Use Sugar Logic to apply calculations, logic checks, and formatting to your data, or copy data from one field to another.

These tasks are completed within the tabs of the Doc Merge Template Assistant:

- **Fields**: Copy data from your Sugar records
- **Dynamic Elements**: Insert lists, tables, and dates
- **Sugar Logic**: Produce custom content using Sugar Logic

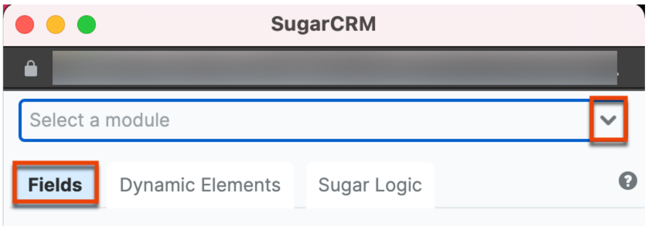


Copying Fields from the Template Assistant

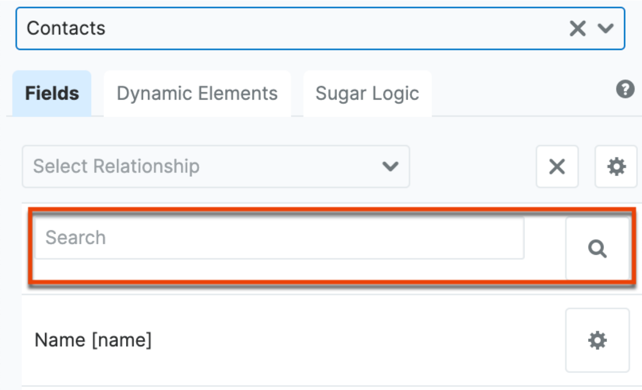
The Fields tab of the Template Assistant allows you to copy the merge codes for Sugar module fields to your system clipboard, including custom fields, from which you can paste into a file to create a document template:

To copy fields:

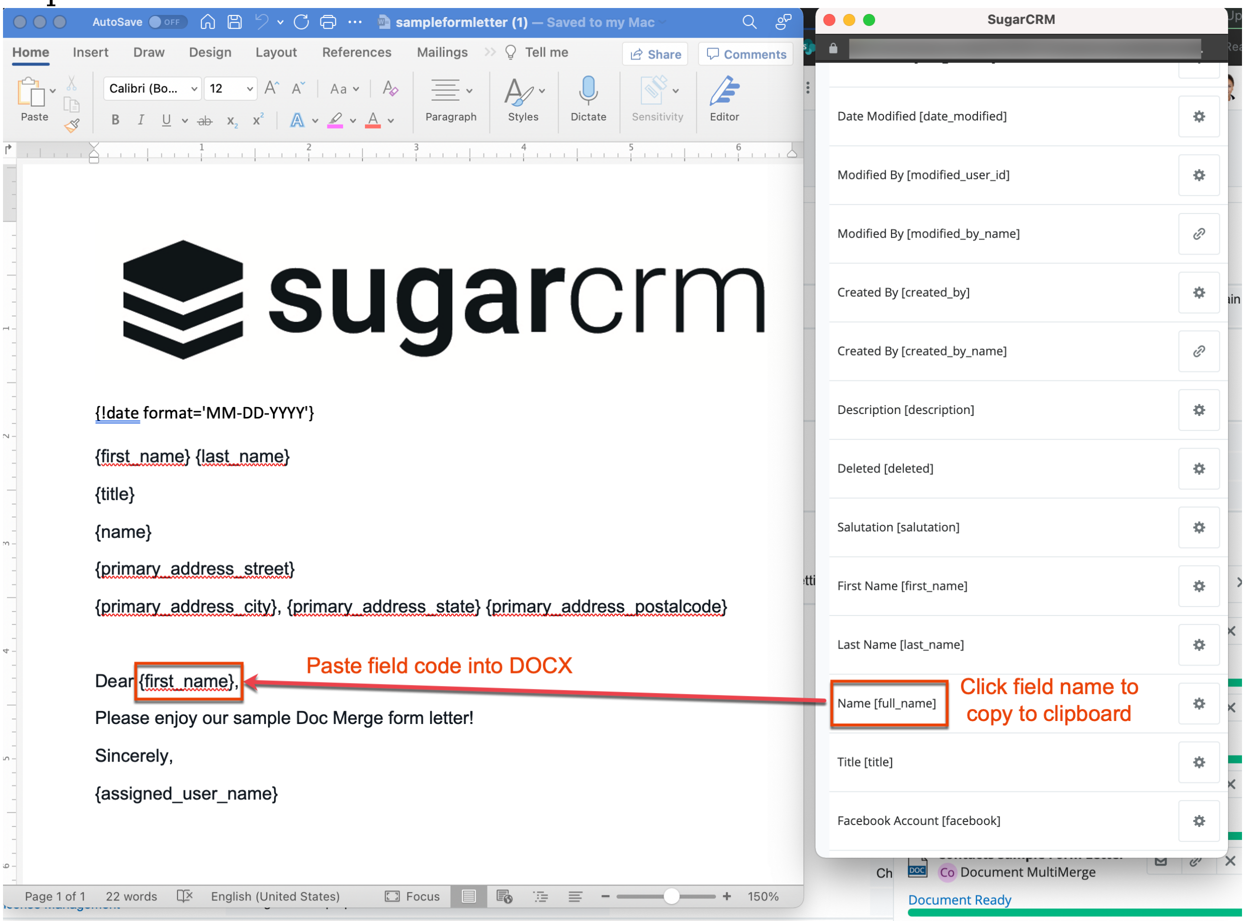
1. Navigate to the Fields tab in the Template Assistant.
2. Select a module from the dropdown list. The fields in the selected module display as a list with the associated field merge code.



3. Scroll through the list or use the Search field to locate the desired field.



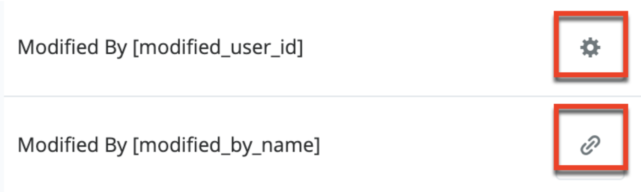
4. Click the name of the field to copy the field merge code to your system clipboard.
5. In your document template file, paste the field in the desired location.
6. Repeat for all desired fields.

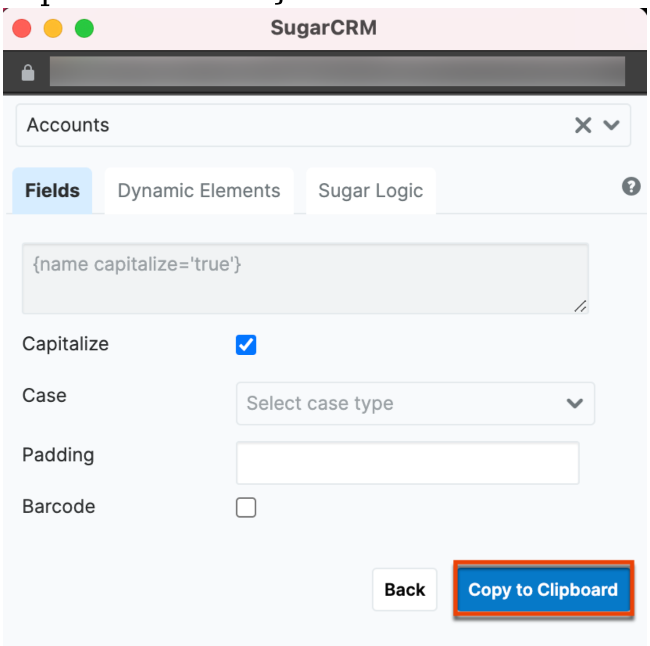


Configuring Fields

You can configure how field values will populate the merged document by setting options before you copy the field merge code (e.g., capitalizing).

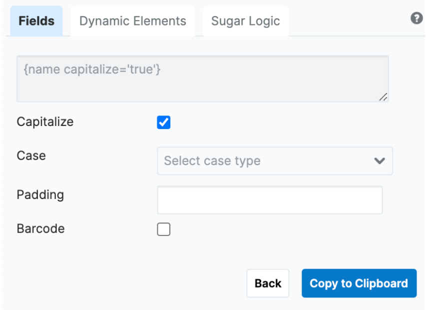
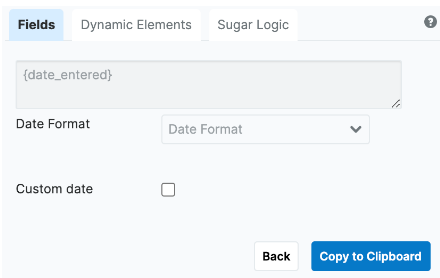
To configure fields:

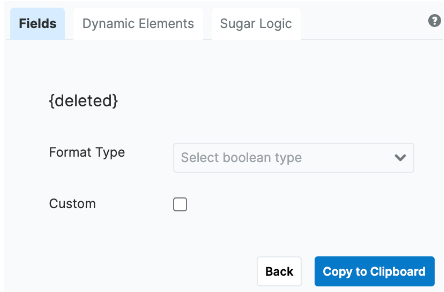
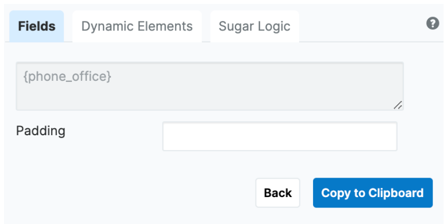
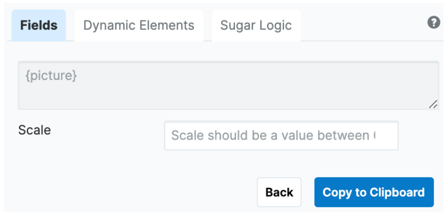
1. Follow steps 1 - 3 in the Copying Fields from the Template Assistant section.
2. Click the settings icon to the right of the field to configure or the link icon for fields that have relate fields. Different field types have different field settings, which are described in detail in the Field Settings section of this page.


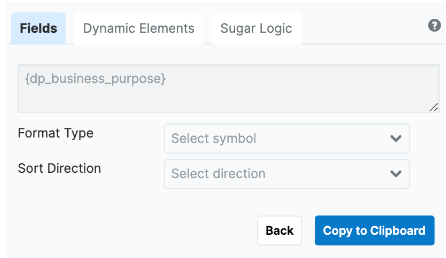
3. Set the desired options, and then click the Copy to Clipboard button. In the example pictured here, we are configuring the Name field to output on our template with a capital first letter. The appropriate merge code for your configuration is produced and stored in your clipboard: {name capitalize='true'}


4. Paste the code from your clipboard into the desired location In your document template file.
5. Return to the Template Assistant and click the Back button to return to your previous location.

Field Settings

Field Types	Settings	
• ActionButton • Dropdown • Email • Iframe • Parent • Radio • TextArea • TextField • URL		• **Capitalize**: When selected, the first letter of the value will be capitalized. Only the first word will be capitalized for multi-word values. • **Case**: Converts the value to all uppercase or all lowercase. • **Padding**: Number of spaces to add after the value when it is placed inside a table cell in the template. • **Barcode**: Select this field to include a scannable barcode in the document template. Please refer to the Barcodes section for more information.
• Date • Datetime		• **Date format**: Select a standard format for the date field. • **Custom date**: Select this option to identify a custom date format. Click the Help link to navigate to a page with information on acceptable date formats.

• Checkbox		• **Format Type**: Select the format that you would like to use to output the boolean value (true/false, checked/unchecked, 1/0, yes/no, on/off). • **Custom**: Select this option to define custom output for the boolean values. • **Custom States**: Displayed when the Custom option is selected, identify the custom true and false boolean values in these text boxes (e.g., "Enrolled"/"Not Enrolled").
• Phone • Currency • Integer		• **Padding**: Number of space characters to add around the value.
• Image		• **Scale**: Resize the image when it is merged into a document by the value identified in this field. Use a value between 0 and 1, where 1 is 100% (e.g., enter 0.5 for 50%).
• Multiselect		• **Format Type**: Display the multi-select field values as a bulleted or numbered list. • **Sort direction**:

		Display the values in ascending or descending order.

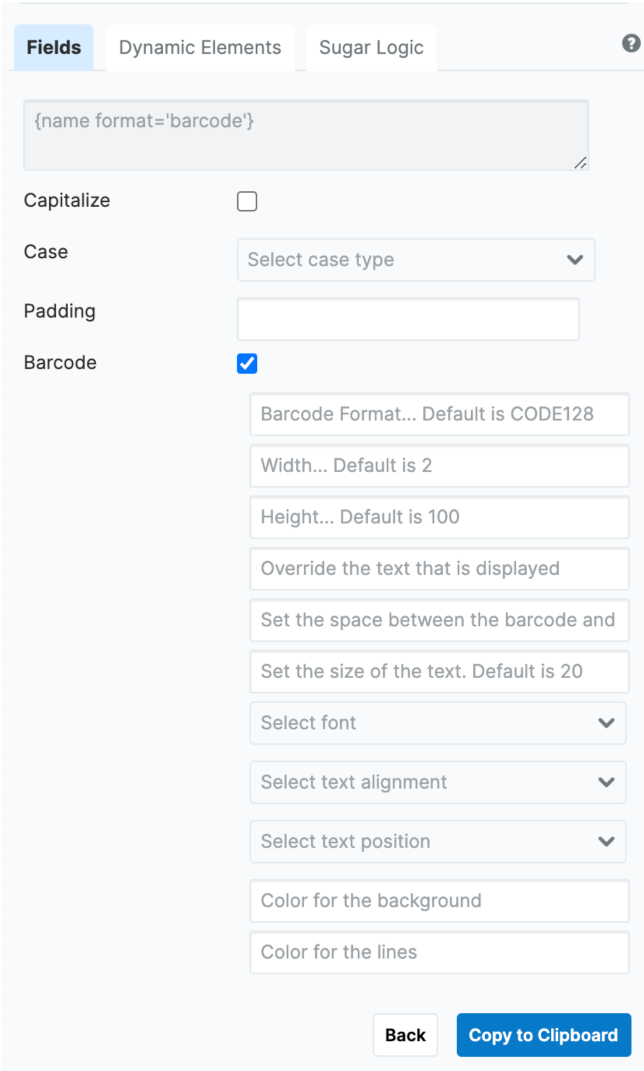
Barcodes

You can include scannable barcodes in merged documents for the following field types:

- ActionButton
- Dropdown
- Email
- Iframe
- Parent
- Radio
- TextArea
- TextField
- URL

To include a barcode on your template:

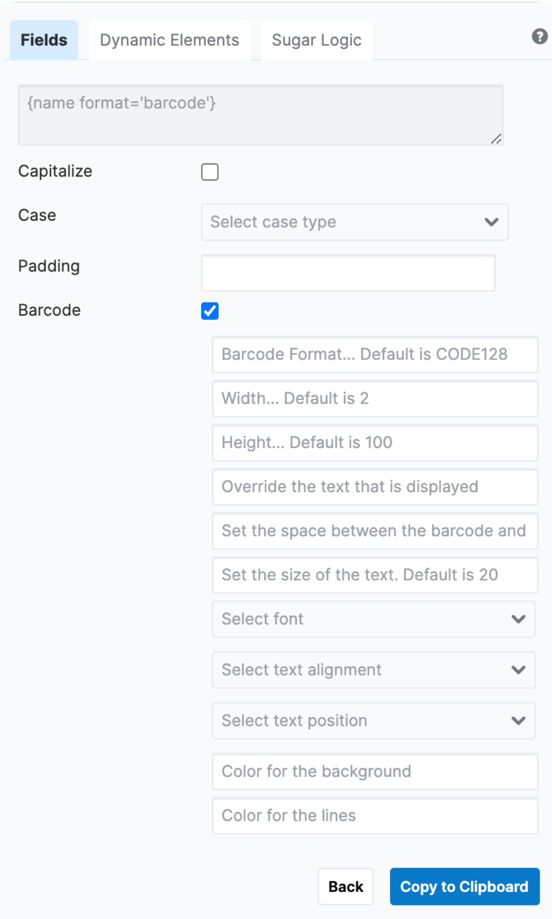
1. Select the Barcode checkbox when configuring the field. The following fields display:



2. Complete the settings using the guidance text in each field and the reference material provided on the [jsBarcode wiki page](#).
3. Click the Copy to Clipboard button and paste the copied code into your external template.

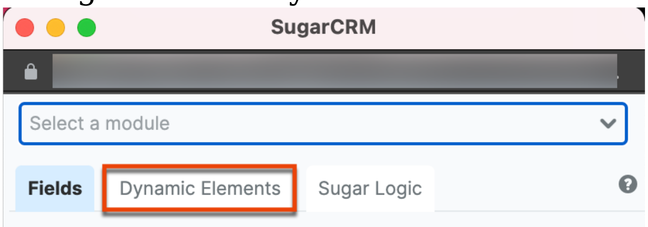
The following example shows the settings used and the resulting barcode in the merged document:

Barcode Configuration	Barcode Result
	Income Free Investing LP



Adding Lists of Related-Module Data to Document Templates

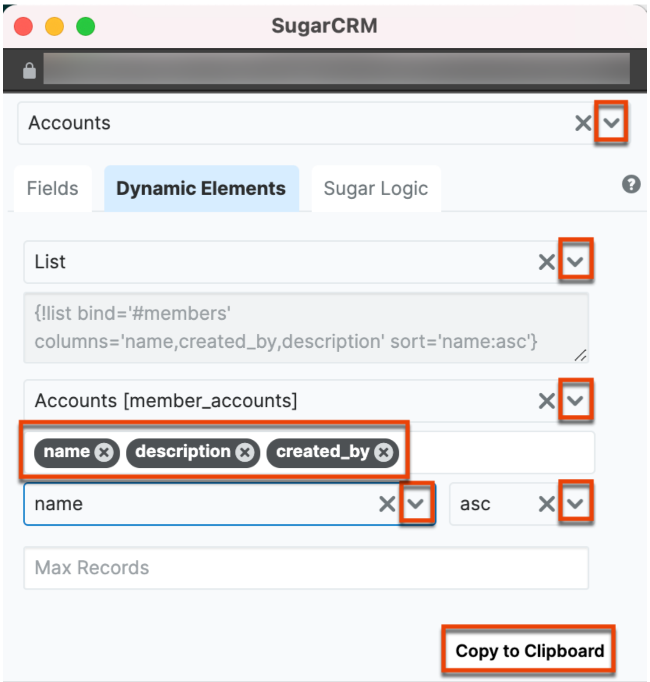
To add a bulleted list of related record field values to your template:

1. Navigate to the Dynamic Elements tab in the Template Assistant.


2. Select the module containing the records you want to show.
3. From the "Select Directive" dropdown, select "List".
4. From the "Select Relationship" dropdown list, select the name of the related module.
5. From the "Select Relationship Fields" list, select all fields to be included in the list.
6. From the Sort dropdown list, select the name of the field on which to sort the list.

7. In the remaining dropdown list, select "asc" to sort the list in ascending order or "desc" to sort the list in descending order.
8. In the Max Records field, optionally identify the maximum number of records to return. If you do not identify a limit, then all matching records will be returned.
9. Click the Copy to Clipboard button to copy the set of merge codes to your document template. The example shown below produces the following merge code:

   {!list bind='#members' sort='name:asc' columns='name,created_by,description'}



Adding Tables of Related-Module Data to Document Templates

There are two methods for adding related record field values to your template:

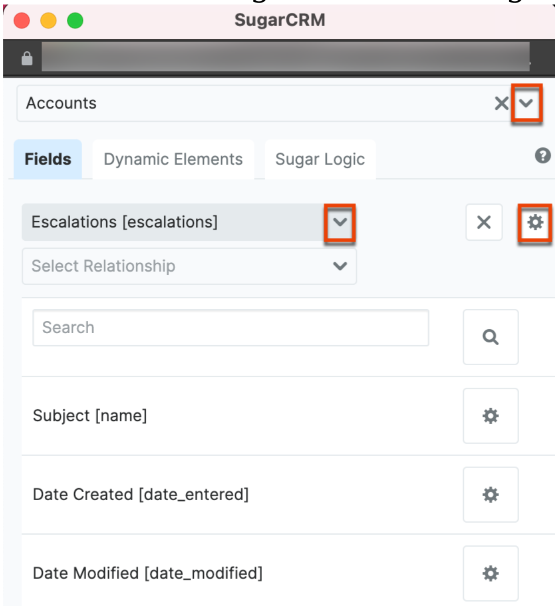
- Formatted table: Select related module fields on the Template Assistant Fields tab to copy and paste a formatted table to your Document Template.
- Merge code: Select related module fields on the Template Assistant Dynamic Elements tab to copy and paste a merge code that produces a table in the merged document.

Related-Module Data Formatted Tables

To insert field values from related records as formatted tables in your template:

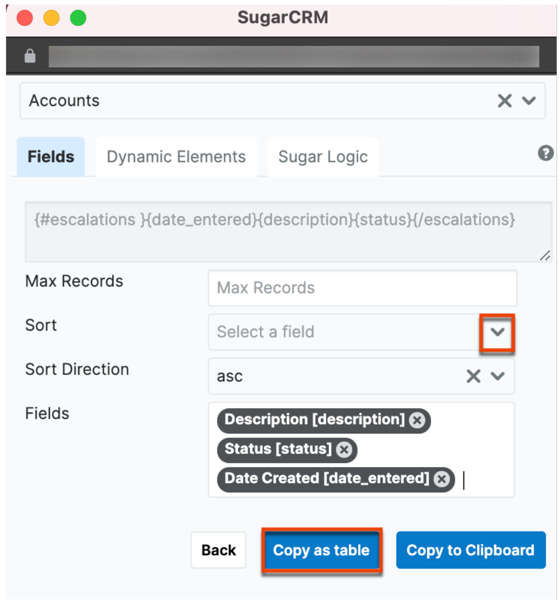
1. Navigate to the Fields tab of the Template Assistant.

2. Select a module from the dropdown list. The fields in the selected module display as a list with the associated field merge code.
3. From the "Select Relationship" dropdown, select the name of the related module.
4. Click the settings icon to the right of the selected module.



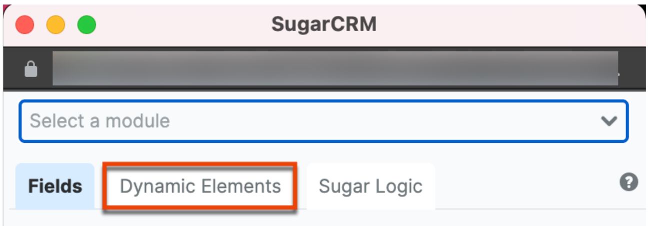
5. In the Max Records field, optionally identify the maximum number of related records to include in the table.
6. From the "Select a field" dropdown, select the fields you want to show in the table. Selections are shown in the Fields box below.
7. In the Sort Direction field, select the order in which the records will be displayed: alphabetically ascending or descending.
8. Click the "Copy as table" button to copy the set of merge codes to your clipboard so that you can paste the code into your document template. On merge, the data from related records will be listed as the rows of a formatted table.

Date Created	Description	Status
{#escalations } {date_entered}	{description}	{status}{/escalations}

Related-Record Data Merge Codes

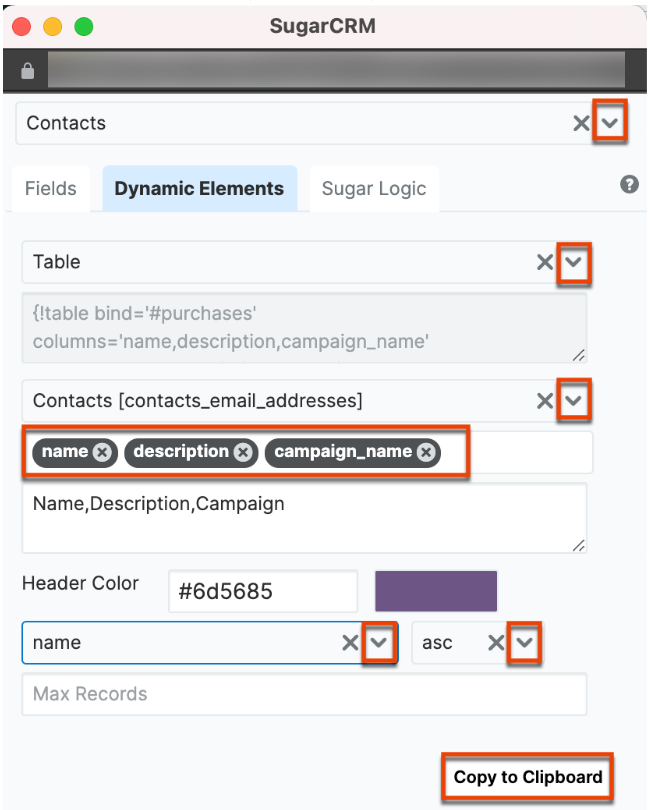
To add related record field values with merge codes:



1. Navigate to the Dynamic Elements tab of the Template Assistant.
2. Select the module containing the records you want to show.
3. From the "Select Directive" dropdown, select "Table".
4. From the "Select Relationship" dropdown list, select the name of the related module.
5. From the "Select Relationship Fields" list, select all fields to be included in the list.
6. In the Header Color field, either type the name of a color for the table's header row or click into the field to use the color picker which adds the corresponding hex code.
7. From the Sort dropdown list, select the name of the field on which to sort the list.
8. In the remaining dropdown list, select "asc" to sort the list in ascending order or "desc" to sort the list in descending order.
9. In the Max Records field, optionally identify the maximum number of records to return. If you do not identify a limit, then all matching records will be returned.

10. Click the Copy to Clipboard button to copy the set of merge codes to your document template. The example shown below produces the following merge code, which produces a table with the field values in the merged documents:

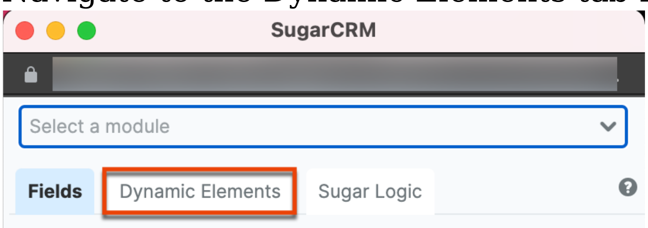
    {!table header-color='gray' bind='#contacts' columns='name,phone_mobile,email_and_name1' header='Name,Mobile,Name' sort='name:asc'}

Adding Date Stamps to Document Templates

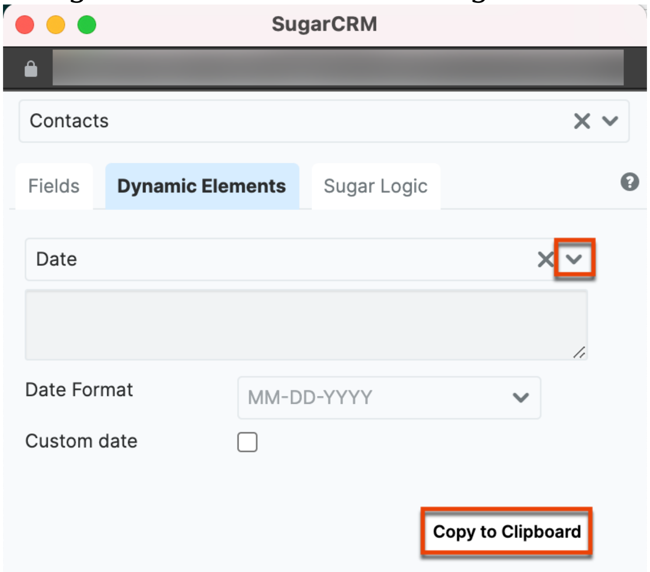
To add a date stamp that will populate with the current date upon merge:

1. Navigate to the Dynamic Elements tab in the Template Assistant.

2. From the "Select Directive" dropdown, select "Date". Selecting a module is not required when "Date" is the selected directive.
3. Either select a format from the Date Format dropdown list or select the

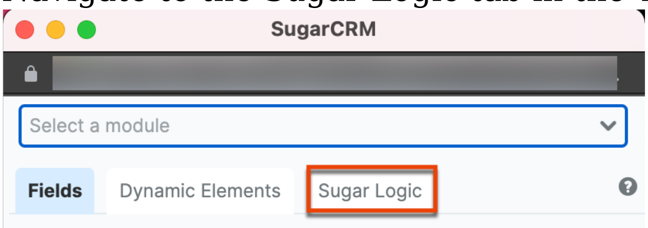
Custom Date option.
4. For custom dates, identify the desired format in the text field. Click the Help link for an external resource to custom date formats.
5. Click the Copy to Clipboard button to copy the merge code to your document template. The example shown below produces the following merge code:

   {!date format='YYYY MMM'} which adds the date when the document merge is initiated to the merged document in YYYY MMM format.


Using Sugar Logic in Document Templates

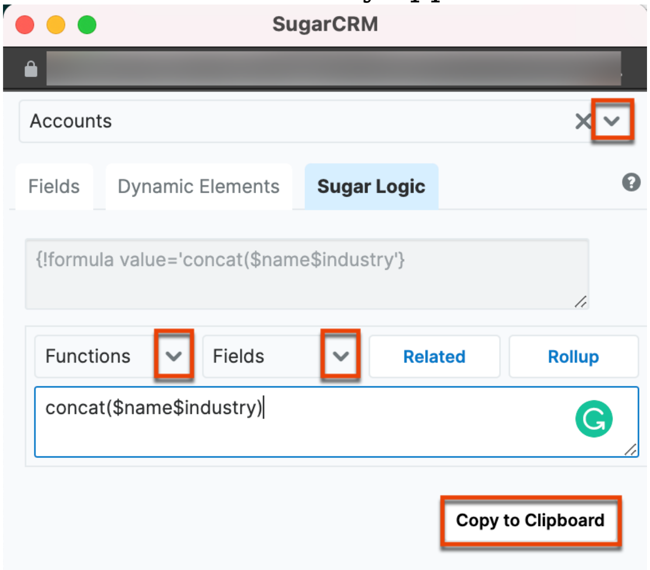
Example functions include counting the related records (count), returning the sum of several values (rollupConditionalSum) or the difference between two values (subtract), and even converting a non-string value to a string (toString).

To use Sugar Logic formulas in document templates:

1. Navigate to the Sugar Logic tab in the Template Assistant.


2. Select a module from the list.
3. Build your formula by selecting functions and fields from the dropdown lists. Please refer to the Sugar Logic documentation for more information.
4. Click the Copy to Clipboard button to copy the formula to your document

template. The example shown below produces the following merge code: {!formula value='concat($name,$industry)'} which returns the account's name with the industry appended.



Using Condition-Based Logic in Document Templates

In addition to the ability to use Sugar Logic formulas in documents templates, you can use condition-based logic by manually constructing IF/ELSE IF statements. Please refer to the Filtering with Conditionals in Doc Merge article for more information.

Document Templates Module

The Document Templates module was added to Sugar to support the Doc Merge feature. The Document Templates module is where you can upload new document templates and manage existing document templates. This section provides information specific to the Document Templates module. For information on views and actions that are common across all Sugar modules, such as creating, editing, and deleting document templates, please refer to the Working with Sugar Modules section of this page.

Note: The Document Templates module is hidden by default. If you do not see the Document Templates module, please check the Layout Options in the Advanced tab of your user profile or ask your Administrator to unhide the module via Admin > Display Modules and Subpanels.

Document Template Fields

The Documents module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role 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
Name	Descriptive name for the document template. This name will be appended to the name of merged documents and will identify each merged document in the Doc Merge Widget.
Template	Name of the source template file. Click the Browse button to locate the file on your computer, and then click the Open button.
Template Module	The module with which the template is associated. The template is only available for use in document merging from the selected module.
Use Revisions	When enabled, each occurrence of a record being merged with this template is added to the Document Revisions subpanel in the record. If this option is disabled, then only the most recent occurrence of the merged document is maintained in the record's Documents subpanel; however, all revisions are still maintained in the Documents module.
Label Merging	When enabled, the template can be used for mass merging records into label format. Templates with Label Merging enabled can only be used for merging multiple records; you cannot merge a label template with an individual record.
Prefix	Optional text to be included at the beginning of the merged document's file name.
Suffix	Optional text to be included at the end of the merged document's file name.

Assigned to	Owner of the document template. The value defaults to the current user, but you can select any other user to be the owner of the template. Templates are available to all users regardless of ownership.
Teams	The Sugar team(s) assigned to the record.
Extension	The source template file format extension.

Working With Sugar Modules

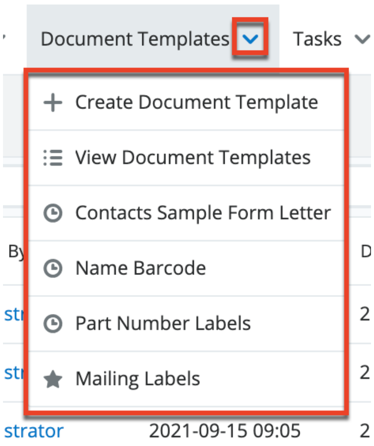
While the Document Templates module has some features that only apply to document templates, it also uses the Sidecar user interface that most Sugar modules are based on. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Document Template Menus

The Document Templates module contains various options and functionality that are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Document Templates-specific functionality, within this page.

Module Tab Menus

The Document Templates module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Document Templates list view. You may also click the triangle in the Document Templates tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important operations within the module. The Recently Viewed menu displays the list of document templates you most recently viewed. The Favorites menu displays the list of document templates you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Document Template	Opens the record view layout to create a new document template.
View Document Templates	Opens the list view layout to search and display document templates.

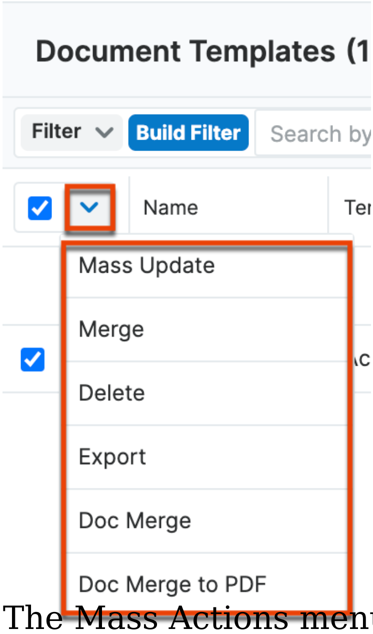
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Document Templates list view displays all document records and allows for searching and filtering to locate specific documents. You can view the basic details of each record within the field columns of the list view or click a document's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual document records or click the checkbox in the list header to select all records displayed on the current set of list view results.

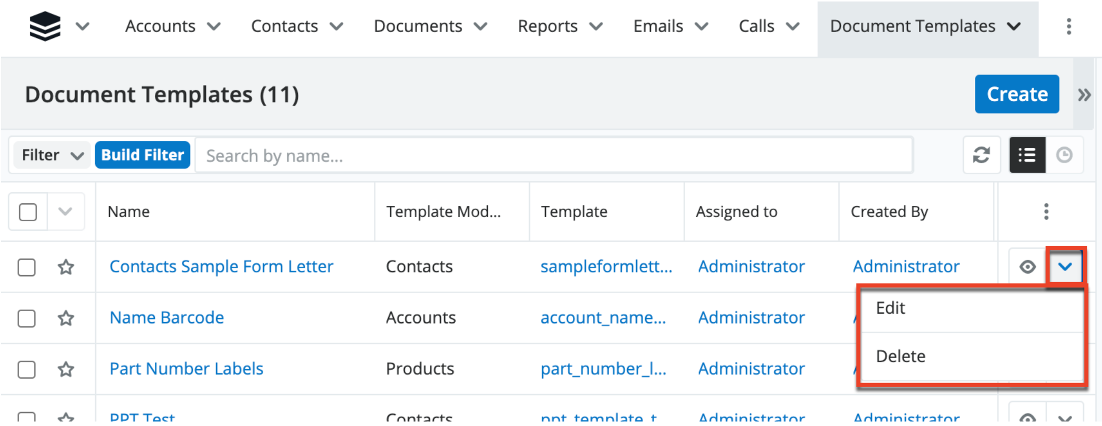


The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more document templates at a time.
Merge	Merge two or more duplicate document templates.
Delete	Delete one or more document templates at a time. **Note**: All document revisions related to the parent document template record will be deleted when the document template is deleted.
Export	Export one or more document templates to a CSV file.
Doc Merge	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Doc Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual document directly from the list view.

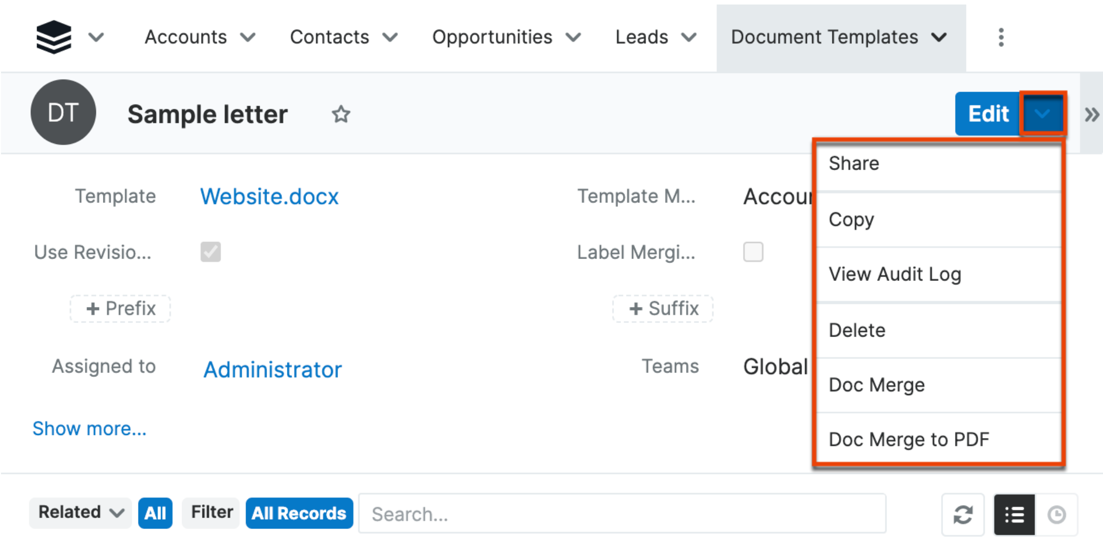


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this document template in the intelligence pane.
Edit	Edit this document template.
Delete	Delete this document template. **Note**: All document revisions related to the parent document template record will be deleted when the document template is deleted.

Record View Actions Menu

The Document Templates record view displays a single document template in full detail including its fields and subpanels of related records. To access a document template's record view, click a hyperlinked document name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	**Description**
Edit	Edit this document template.
Share	Share a link to this document template via email.
Copy	Duplicate this document template. **Note**: Only the last document revision record related to the original document template will copy over to the new document template, and the "Change Log" will display "Document Created".
View Audit Log	View a sequence of changes made to this record.
Delete	Delete this document template. **Note**: All document revisions related to the current document template will be deleted when the document template record is deleted.
Doc Merge	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Doc Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF

	documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to documents.

General Instructions for Working With Sugar Modules	**Document Templates-Specific Instructions**
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Documents-specific help exists for each topic, use the links below to navigate to sections of the current page.
Creating Records	
Viewing Records	
Searching for Records	
List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	
Editing Records	
Deleting Records	
Exporting Records	
Recalculating Calculated Values	
Finding Duplicate Records	
Merging Records	
Favoriting Records	
Following Records	
Sharing Records	

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Dashboards and Dashlets

Overview

Sugar dashlets allow users to build specific data, insights, and useful visualizations into their Sugar views. Dashlets live within dashboards that are available on the Home page as well as on list view and record view intelligence panes.

Most modules and views include out-of-the-box default dashboards which include some commonly-used dashlets. Sugar admin users may modify these stock, default dashboards or create additional dashboards to push to teams of users. Users can also create additional dashboards or pull shared dashboards onto their view from the Dashboards module and even create duplicates of existing dashboards to customize for their own use. If more than one dashboard is available for a particular view, users may switch between them using the view's dashboard selection list.

Users with a Sugar Sell license type have access to a specialized dashboard called Renewals Console. It is a Home page dashboard that provides a powerful work environment for your organization's Sales agents and Customer Success Managers to automate and streamline renewal management. The Renewals Console makes it easy to manage accounts, quickly see the status of your current quarter's renewal pipeline, and manage individual renewal opportunities. For more information, refer to the Renewals Console documentation.

Understanding Dashboards

The following sections explain the various methods of accessing and working with dashboards as well as provide an overview of the factors involved in sharing common dashboards between users.

Dashboards in Views vs the Dashboards Module

Users can access dashboards in the two following ways, with each way offering different functionality.

- **Dashboards in Views**: Every-day use of dashboards occurs in the Home page as well as list view and record view intelligence panes on Sidecar modules. Accessing dashboards in these locations will be referred to as "dashboards in views". The Dashboards in Views section of this page details the actions you can take when using dashboards in views.

- **Dashboards Module**: Certain actions are not available with accessing dashboards in views, particularly actions associated with sharing dashboards with other teams and making dashboards visible in views. These tasks are accomplished in the Dashboards module which includes a Dashboards list view and record view. The Dashboards list view can be accessed when viewing any dashboard in a view by selecting "Manage Dashboards" from the dashboard selection list. Viewing a dashboard in the Dashboards module does not display its dashlets or provide many of the actions available when using them in views. The Managing Dashboards section of this page details the actions you can take when accessing the Dashboards module.

Shared Dashboards

Several dashboard fields control whether a dashboard is available in a user's Dashboards module and whether it appears on the user's views.

Note: When a shared dashboard is modified, other users will see the effects of the changes after refreshing their view or switching to the affected dashboard.

Teams Access

The Teams field controls whether or not a dashboard is available in a user's Dashboards module. Dashboards follow the same team permissions rules as any other Sugar module. When a user first creates a dashboard, the Teams field is automatically set to only his or her private team, which typically makes it visible to that user and the user's management chain. This is because private teams, by default, only include the individual user, and Sugar recommends not adding other users to any private team. Each user's management chain inherently belongs to each of the user's teams. For more information, please refer to the Private Teams and Team Membership Types sections of the Team Management documentation.

The Teams field can be modified to allow other users to see it in their Dashboards module as described in the Sharing Dashboards With Teams section below. Once other users have teams access, the Favorite and Default Dashboard fields determine whether the dashboard appears for use in their views, as described in the next section.

Note: Admin users have access to all Sugar records, regardless of team membership. No dashboards will be hidden from admin users in their Dashboards module.

Favorites and Default Dashboards

Two dashboard fields factor into whether a dashboard to which a user has team access actually appears in that user's view: the Favorites designation and the Default Dashboards field.

The Default Dashboards field can only be edited by admin users. When it is checked, the dashboard will appear on the views of every user that has teams access. This effectively pushes the dashboard to users without their involvement. For more information, refer to the Pushing Dashboards to Teams section below.

When the Default Dashboards field is unchecked, a dashboard will only appear on a user's views when the user has marked it as a favorite. Dashboards can be favorited via the Dashboards list view or record view. To remove a dashboard from the view, users can simply unmark the Favorites designation, either from the dashboard itself or from the Dashboards module. For more information, refer to the Pulling Dashboards to Your Views section below.

Personalizing Shared Dashboards

As an alternative to using a shared dashboard as-is, users can duplicate any dashboard which appears in their views. One of the main benefits of this is that it allows them to use the shared dashboard as a starting point for personalizing the dashlets to suit their particular needs. For more information, refer to the Duplicating Dashboards section.

Out-of-the-Box Default Dashboards

Many modules include prebuilt dashboards that come out-of-the-box with Sugar. Admin users have the ability to modify or remove these dashboards. By default, most of these dashboards have the following attributes:

- **Name**: Following the format <Module> <View> (e.g., "Accounts List")
- **Assigned To**: Assigned to the primary admin user (ID = 1)
- **Teams**: Global
- **Default Dashboard**: Checked

It is important that admin users not treat these default dashboards like personal dashboards. So long as the Default Dashboard field remains checked, any changes made to the dashboards will be pushed to all users belonging to the associated team(s). Since the Global team is automatically selected, changes would affect all users. If an admin user wishes to modify the default dashboards for personal use, they should duplicate the dashboards, then make changes to the new copy which will be assigned to their private team and not have the Default Dashboard box checked. For more information, refer to the Personalizing Shared Dashboards section. Alternatively, admins can always create new dashboards from scratch for their personal use.

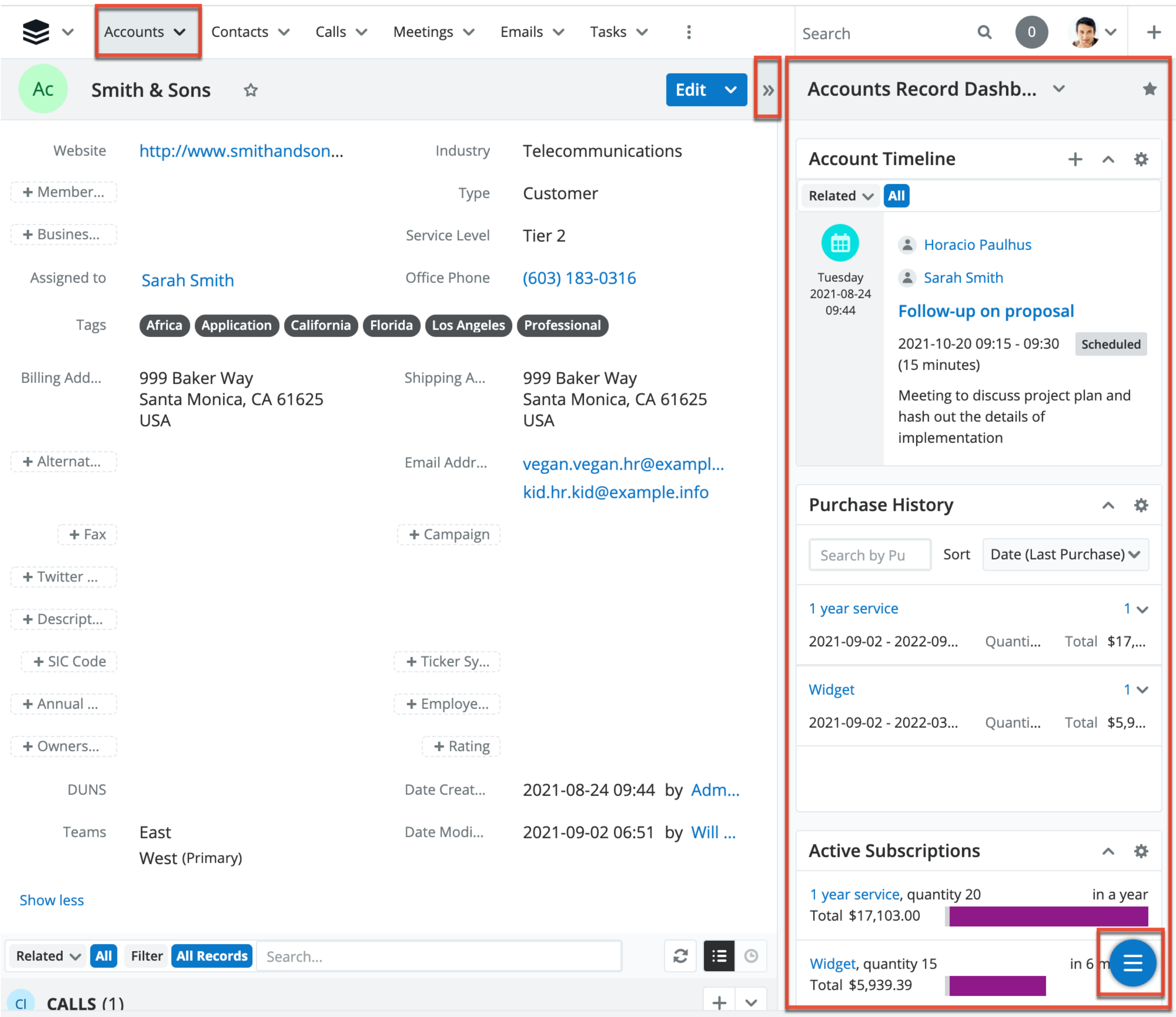
Users with a Sugar Sell license type have access to specialized dashboards called Renewals Console as well as Focus Drawer dashboards. The Renewals Console is a Home page dashboard that provides a powerful work environment for your organization's Sales agents and Customer Success Managers to automate and streamline renewal management. The Renewals Console makes it easy to manage accounts, quickly see the status of your current quarter's renewal pipeline, and manage individual renewal opportunities. For more information, refer to the Renewals Console documentation.

The Focus Drawer dashboard can be accessed by clicking the Focus icon which appears when hovering over certain links (e.g., a linked account name or call subject) across Sidecar modules and in dashboards (e.g., Renewals Console). The focus drawer provides users with a 360-degree view of the linked record through a set of dashlets contaning relevant information such as the record's related records, related activities (e.g., calls, meetings), purchase history, and active subscriptions. For more information on focus drawers, refer to the User Interface documentation.

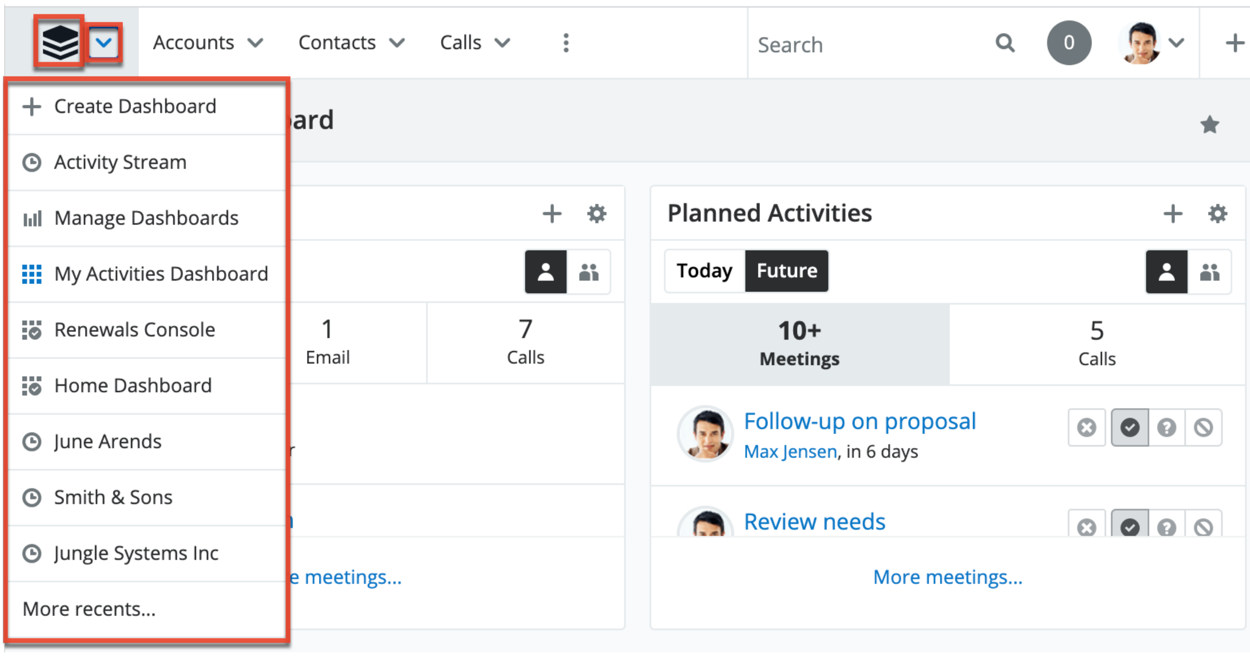
Using Dashboards and Dashlets

Dashboards with their dashlets are available on the list view and record view of Sidecar modules. For example, to access the Accounts record view dashboards, click the Accounts module tab in Sugar's header. Then, click one of the account names that appear on the list view to open its record view. Ensure the intelligence pane is expanded by clicking the arrow icon at the top right of the list view. For more information about intelligence panes, refer to the User Interface page. Please note that the out-of-the-box Record View dashboards display a pre-defined set of dashlets which vary between each Sidecar module. The dashlets available in the dashboard will also vary depending on the user's assigned license type(s).

The floating actions button appears on the bottom-right corner of the intelligence pane, and it allows you to perform various actions (e.g., Create Dashboard) on the current dashboard. For more information, refer to the Dashboard Floating Actions Button section below.



Dashboards are also available on the Home page which can be accessed by clicking the Cube icon at the top left of any Sugar page. For more information about the Home module, refer to the Home documentation. Please note that the floating actions button appears on the bottom-right corner of the screen by default, and it allows you to perform various actions (e.g., Create Dashboard) on the current dashboard.

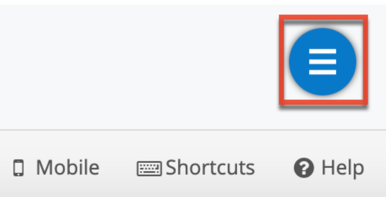


Both locations will remember which dashboard you last accessed in each view and open it automatically when you return.

Dashboard records are also visible in the Dashboards module which can be accessed by selecting "Manage Dashboards" from any view's dashboard selection list. The Dashboards list view and record view offers fields and functionality not available when viewing dashboards in intelligence panes and the Home page. However, the dashboard's layout and dashlets are not visible via the Dashboards module. For more information, refer to the Managing Dashboards section.

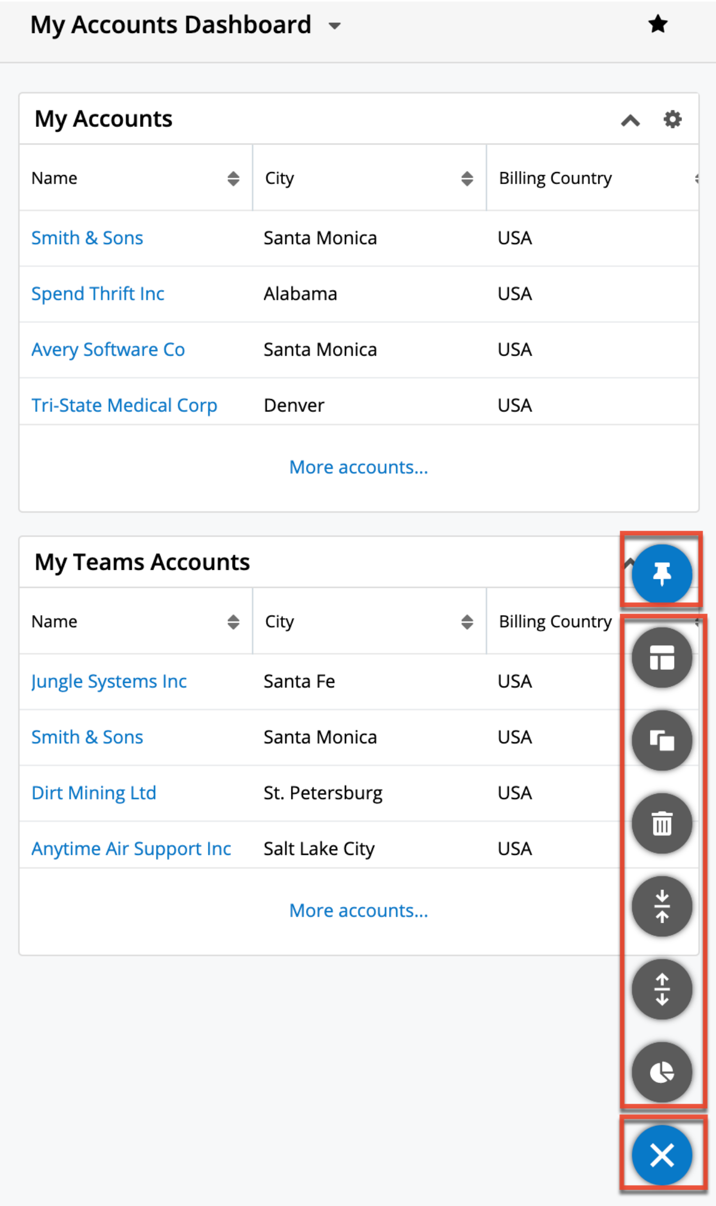
Dashboard Floating Actions Button

The floating actions button on the dashboard allows you to perform various actions such as create dashboards, duplicate dashboards, etc. By default, the floating actions button appears on the bottom-right corner of the dashboard, but you can pin the floating actions button to the top corner by clicking the Pin to Top button in the floating actions menu. You can pin the floating actions button to the bottom corner again by clicking "Pin to Bottom".



Click the floating actions button to view the available options (e.g., Create

Dashboard, Add Dashlet) in the floating actions menu as shown below for the Accounts list view's intelligence pane as an example. Click the X button to collapse the floating actions menu and display the floating actions button again. Please note that the floating actions button also appears on the Console dashboard (e.g., Service Console) and allows you to perform actions such as create dashboards and edit module tabs.



The options in the floating actions menu allow you to perform the following operations which are explained in more detail in the sections below:

Option	Description
Create Dashboard	Create a new dashboard.
Duplicate Dashboard	Create and make changes to your own,

	private copy of the original dashboard without affecting what other users see.
Delete Dashboard	Delete the dashboard.
Collapse All Dashlets	Collapse all dashlets on the dashboard at once. Note that Sugar will remember the closed or open state of your dashlets the next time you return to the view. **Note**: This option appears for dashboards (e.g., Accounts List Dashboard) on intelligence panes.
Expand All Dashlets	Expand all dashlets on the dashboard at once. Note that Sugar will remember the closed or open state of your dashlets the next time you return to the view. **Note**: This option appears for dashboards (e.g., Accounts List Dashboard) on intelligence panes.
Add Dashlet	Add a dashlet to the dashboard.

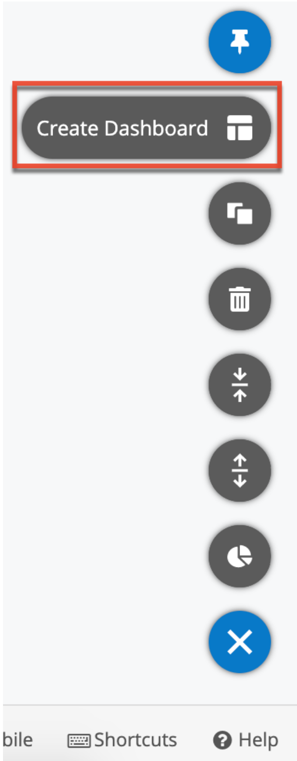
Note: A dashboard and its dashlets may only be edited by the dashboard's Assigned To user and system admin users. Any change to a shared dashboard will update the dashboard for all users.

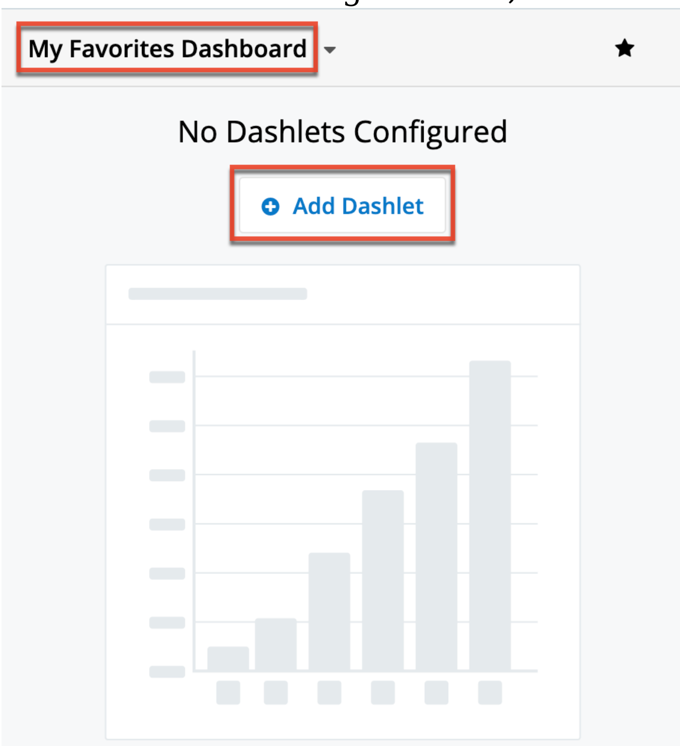
Creating Dashboards

Create a new dashboard and build out its dashlets. New dashboards are automatically assigned to the creating user and their private team. Users can create dashboards in list view and record view intelligence panes and on the Home page. By default, new dashboards will be assigned to the creating user with the Teams field set to the creating user's private team. The dashboard will also be automatically designated as a favorite so that it appears on the user's view after being created.

To make the dashboard available for other users, additional teams can be added to the Teams field via the dashboard's record view. Click "Manage Dashboards" from any dashboard selection list to access the Dashboards list view, then click a dashboard's name to open it in record view. Admin users also have the ability to check the Default Dashboards field to push the dashboard onto the views for all members of the associated teams.

The following steps cover creating a new dashboard called "My Favorites Dashboard" in the Accounts list view intelligence pane as an example:

1. Click the floating actions button in the intelligence pane then select "Create Dashboard".


2. Enter in the name for the new dashboard (e.g., My Favorites Dashboard) then click "Save".
3. Click the Add Dashlet button to add any desired dashlets. For more information on adding dashlets, refer to the Adding Dashlets section.


4. Click "Save" to finalize the new dashboard.

Duplicating Dashboards

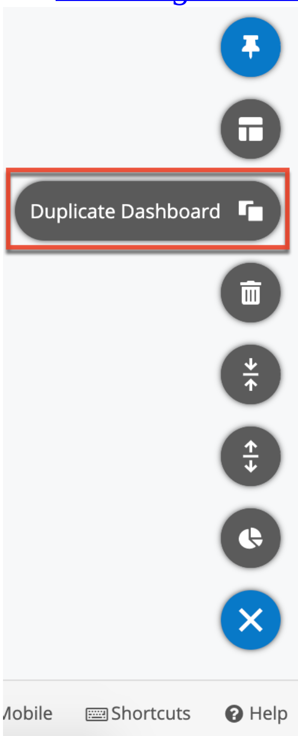
Duplicating a dashboard will create a copy of the original with the following attributes:

- **Name**: Copy of <Original Name> (e.g., "Copy of Accounts List")
- **Assigned To**: The user who performed the duplication
- **Teams**: The private team of the user who performed the duplication
- **Default Dashboard**: Unchecked

Duplication is recommended when you wish to personalize a shared dashboard. By making your changes to your own, private copy, the original dashboard will not be affected for other users. Additionally, dashboards can only be edited by their Assigned To user and admin users. Creating a copy of a shared dashboard owned by another user allows you to optimize the dashboard for your purposes. For more information, refer to the Personalizing Shared Dashboards section.

Duplicating a dashboard containing a List View dashlet with custom filters applied will duplicate the dashlet as well including the custom filter. Please note that you can edit the dashlet but will not be able to edit the shared filter in the Configuration Options page. If you remove the shared filter from the dashlet, you will not be able to apply the same filter again as you do not own it.

To create a copy of a dashboard, simply click the Duplicate Dashboard button from the floating actions menu.

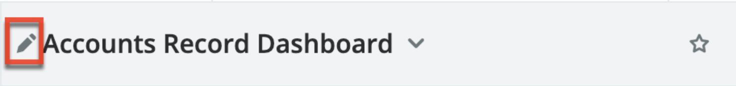


Editing Dashboards

The edit options available for dashboards include renaming dashboards, adding dashlets, resizing dashlets, and rearranging dashlets. Refer to the respective sections for more information.

Renaming Dashboards

Rename dashboards from an intelligence pane, the Home page, or the focus drawer. Click the pencil icon that appears when you hover over the dashboard name, and then type a new name. Shifting focus outside of the field automatically saves the new name.



Dashboards can also be renamed via the Dashboards module by modifying the Name field.

Note: A dashboard may only be edited by its Assigned To user and system admin users. Any change to a shared dashboard will update the dashboard for all users.

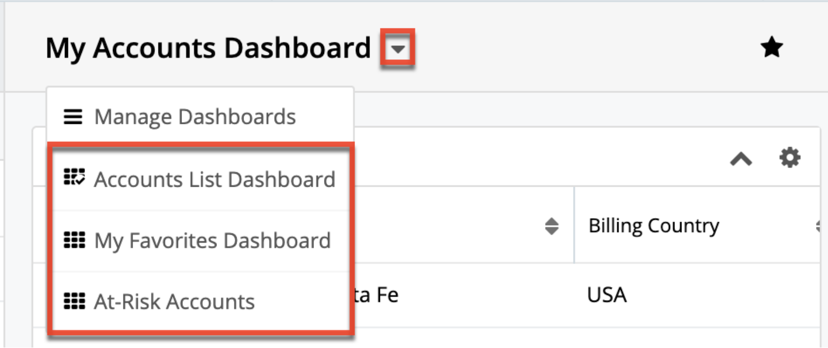
Switching Between Dashboards

Select a dashboard from the dashboard selection list to switch which dashboard is displayed.

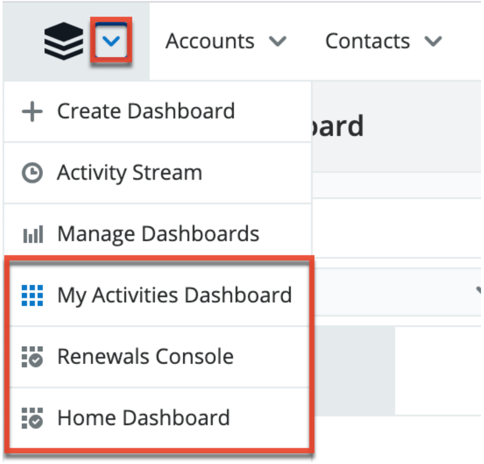
Between default dashboards, shared dashboards, and personal dashboards, users may have multiple dashboards active for a single Sugar view (e.g., Accounts list view). The dashboards selection list contains all of the user's active and default dashboards for the particular view and allows for switching between the dashboards. In order for a dashboard to appear in a view's dashboard selection list, the following criteria must be true:

- The dashboard's Module and View fields match the user's current module and view (e.g., Accounts list view). Each dashboard is only visible in the module and view where it was originally created.
- The user belongs to one or more of the teams selected in the dashboard's Teams field.
- The user has selected the dashboard as a favorite OR the dashboard's Default Dashboard field is checked. Dashboards an admin has marked as default will appear in your views regardless of being a favorite or not.

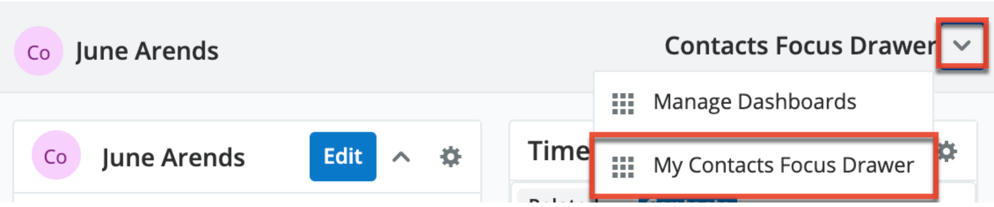
On a record view or list view intelligence pane, click the arrow next to the current dashboard's name to view and select from the list of available dashboards.



On the Home page, click the arrow next to the Cube icon to view and select from the list of available dashboards.



On the focus drawer, click the triangle next to the current dashboard's name (e.g., Contacts Focus Drawer) in the Focus Drawer header and select from the list of available dashboards.



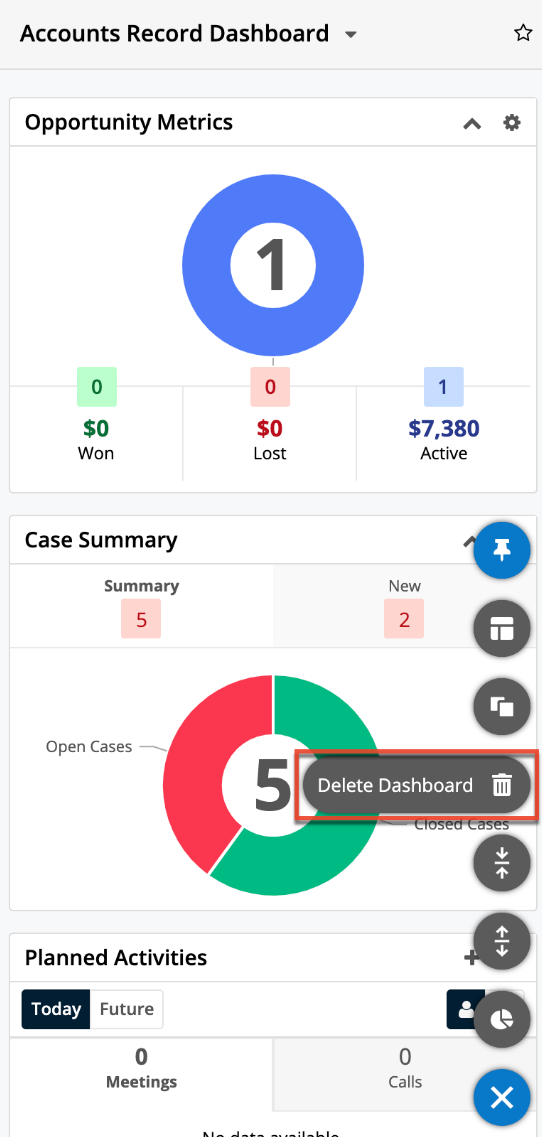
Deleting Dashboards

When a dashboard is no longer useful, it can be deleted by the Assigned To user or an admin user. Deleting a dashboard will make it unavailable for any other users with whom it is shared.

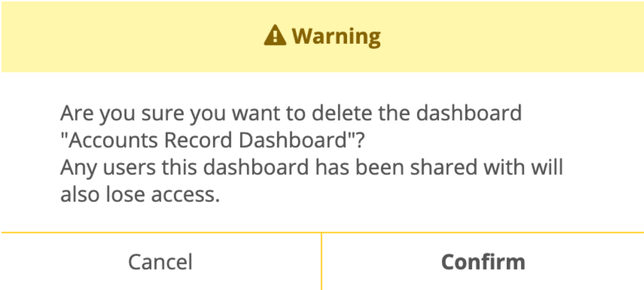
Note: If a shared dashboard is no longer needed by its owner or the dashboard owner will no longer be using Sugar, the dashboard can be reassigned, either by editing the Assigned To field via the Dashboards module or using the [Reassign Records function]() in Admin > User Management.

Use the following steps to delete a dashboard from a list view or record view intelligence pane or from the Home page:

1. Click the [floating actions button]() on the intelligence pane then select "Delete Dashboard".



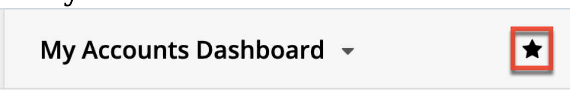
2. Click the Confirm button in the confirmation dialog to finalize the deletion.



Dashboards can also be deleted via the Dashboards module from both list view and record view.

Removing Dashboards From Views

If a user no longer wishes to use a dashboard, they can unmark the Favorites designation by clicking the Star icon. For more information on how the Favorites designation factors into which dashboards are available in your views, please refer to the Pulling Dashboards to Your Views section. Please note that dashboards an admin user has designated as defaults by checking the Default Dashboard box will remain available for use in your dashboard selection list regardless of whether or not you have favorited the dashboard.



The Favorite designation is also available to edit via the Dashboards module.

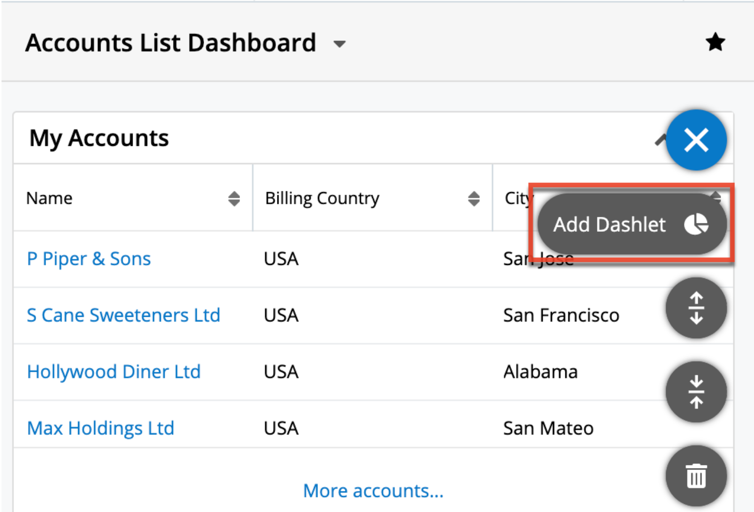
Adding Dashlets

Users can add an unlimited number of dashlet rows to suit their business needs. Adding dashlets can be done when the dashboard is in edit mode either during dashboard creation or when editing an existing dashboard.

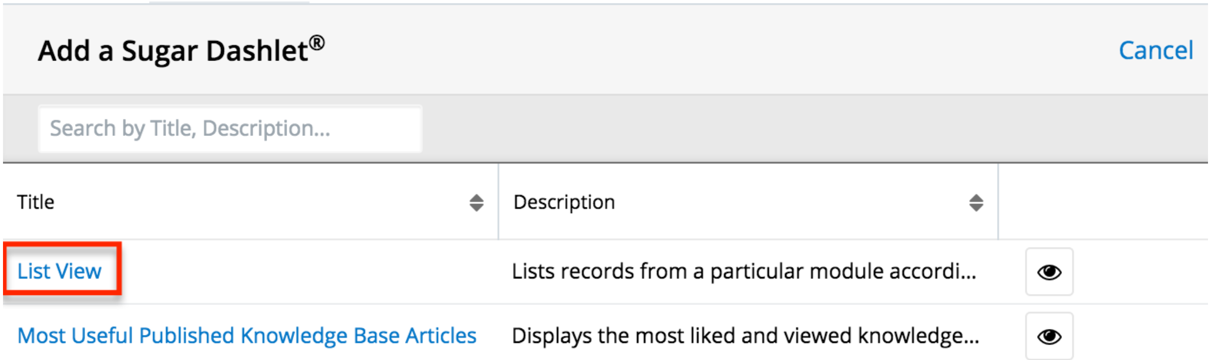
Note: A dashboard and its dashlets may only be edited by the dashboard's Assigned To user and system admin users. Any change to a shared dashboard will update the dashboard for all users.

Use the following steps to add a new dashlet in the Accounts list view intelligence pane as an example:

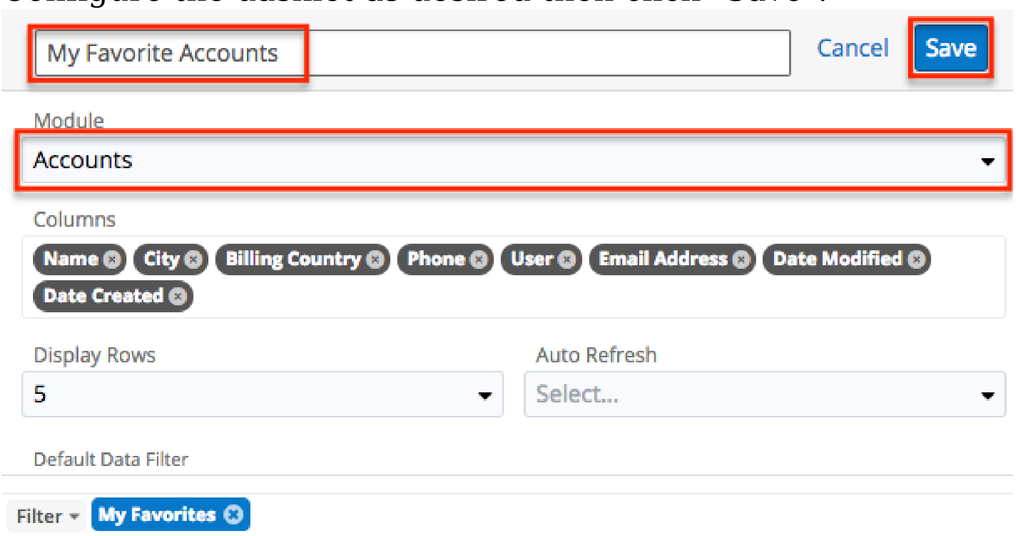
1. Click the floating actions button in the intelligence pane then select "Add Dashlet".



2. Click the title (e.g., List View) corresponding to the desired dashlet in the Add a Sugar Dashlet page.



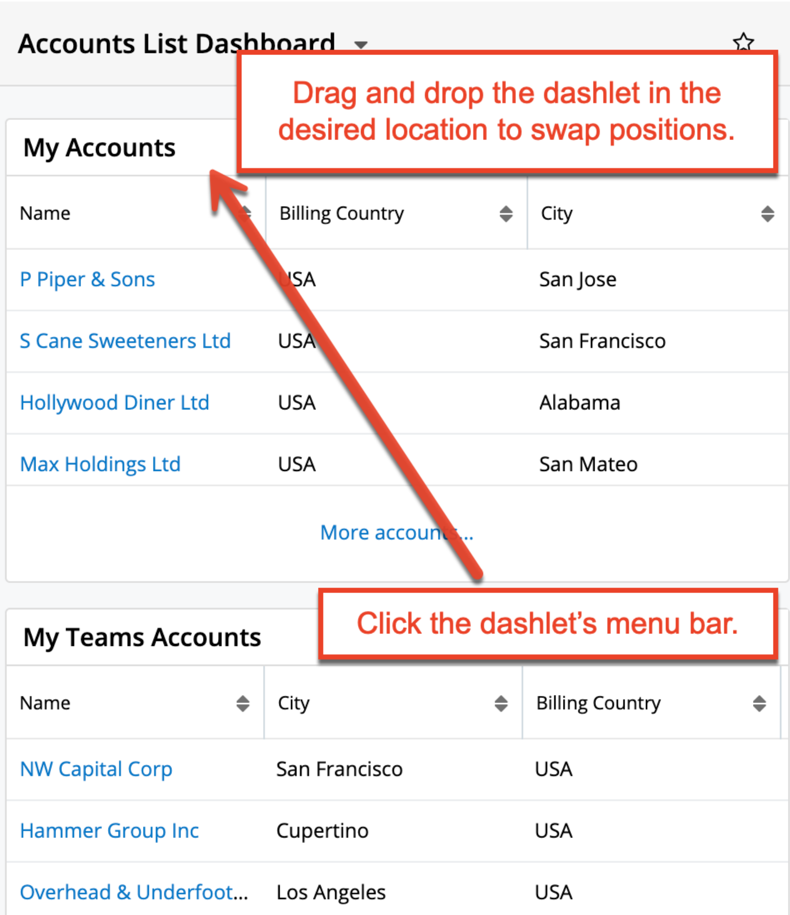
3. Configure the dashlet as desired then click "Save".



4. The dashlet will now appear on your dashboard.

Rearranging Dashlets

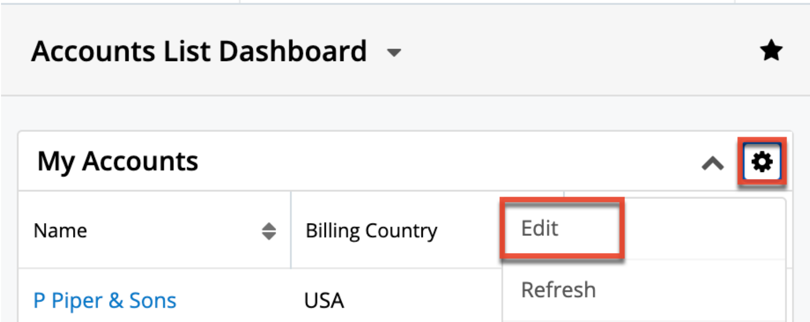
Users have the option to arrange the dashlets within a dashboard to match their viewing preferences. You can easily swap two dashlets by dragging and dropping the dashlets in their desired locations. Simply click and drag a dashlet's menu bar to relocate it



Note: A dashboard and its dashlets may only be edited by the dashboard's Assigned To user and system admin users. Any change to a shared dashboard will update the dashboard for all users.

Editing Dashlets

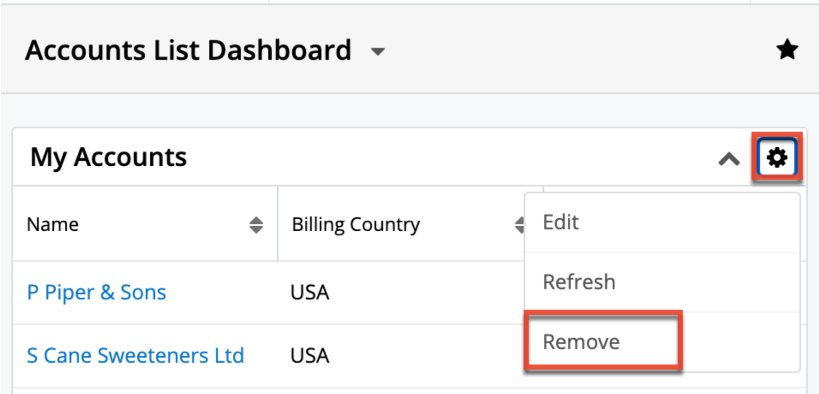
Dashlets can easily be configured to display specific information users want to view. Simply click the Gear icon at the top of the dashlet menu bar then select "Edit", which will display configuration options specific to the dashlet. Make the necessary changes using the available edit options then click "Save" to preserve the change. For more information about specific dashlets and how to configure them, refer to the Commonly Used Dashlets section.



Note: You may not see the dashlet Gear menus, including the Edit option, if you are not the containing dashboard's Assigned To user or system admin user. Any change to a shared dashboard will update the dashboard for all users.

Deleting Dashlets

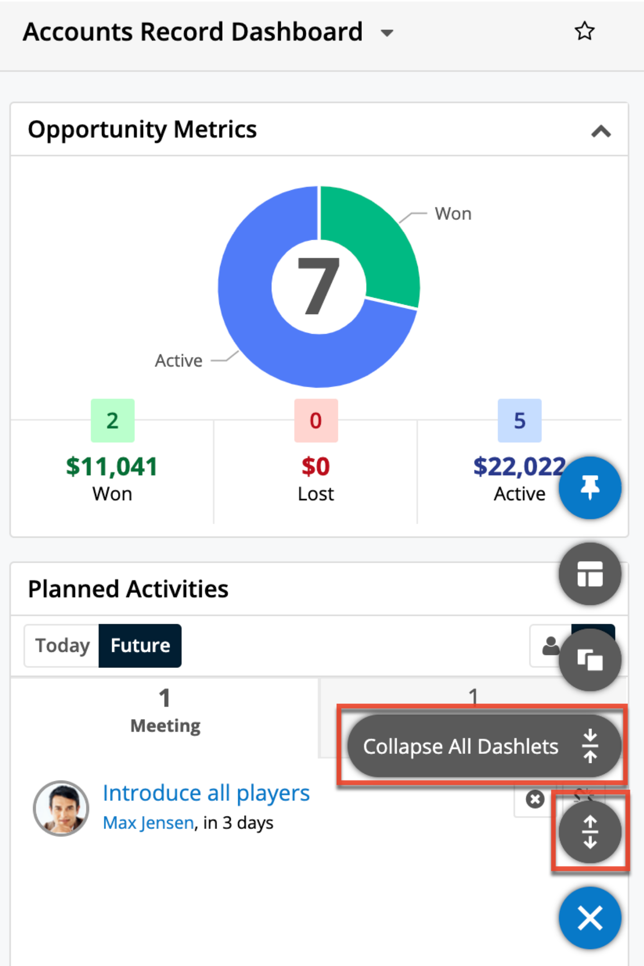
Users can delete dashlets they no longer wish to view on their dashboards by clicking the Gear icon at the top left of the dashlet then selecting "Remove". Prior to deleting a dashboard, consider if other users have access to it and consider instead reassigning the dashboard then un-favoriting it to remove it from your own views. For more information, refer to the Reassigning Dashboards and Removing Dashboards From Views sections.



Note: You may not see the dashlet Gear menus, including the Delete option, if you are not the containing dashboard's Assigned To user or system admin user. Any change to a shared dashboard will update the dashboard for all users.

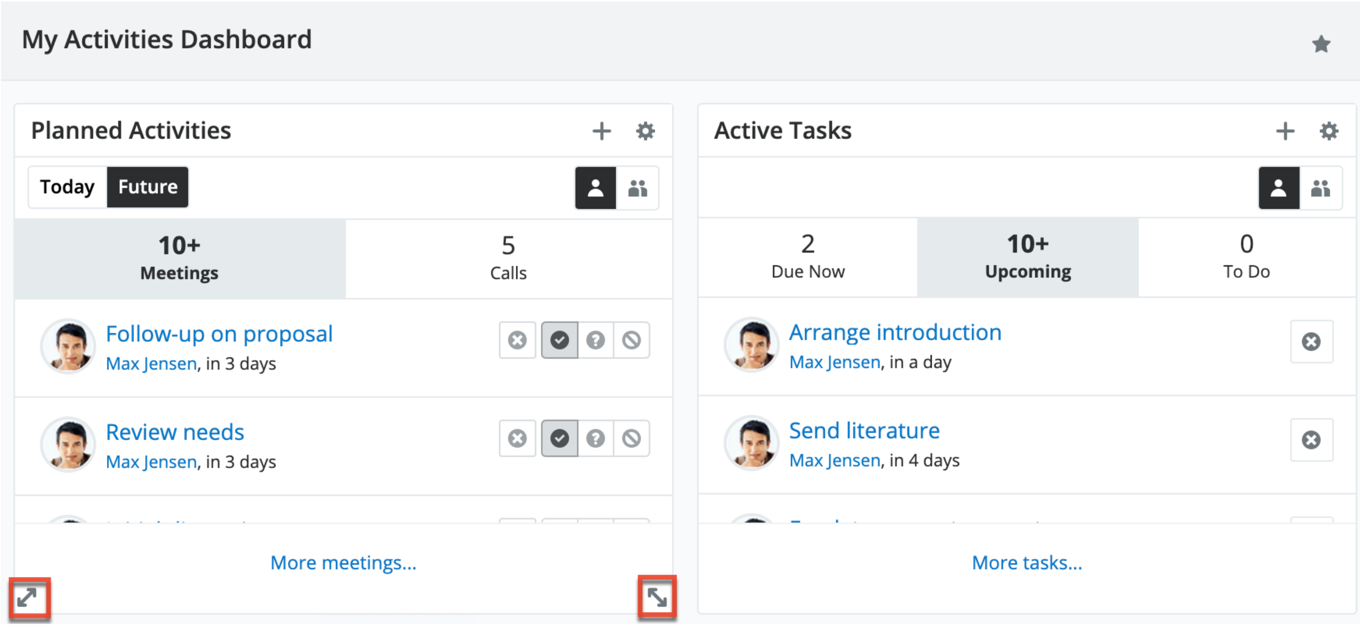
Collapsing and Expanding Dashlets

Users can collapse or expand individual dashlets by clicking the Up or Down arrow on the upper right of the dashlet. Sugar will remember the state of your dashlets the next time you return to the view. For dashboards on intelligence panes, users can also collapse or expand all dashlets on the dashboard by clicking the [floating actions button](#) then selecting "Collapse All Dashlets" or "Expand All Dashlets".



Resizing Dashlets

Users can easily resize the dashlets to fit the available screen real estate and accommodate their desired layout by clicking the double-ended arrow that appears in the bottom corners of the dashlet and dragging to the desired size. Please note that Sugar will remember the new size of the dashlet when you return to the view.

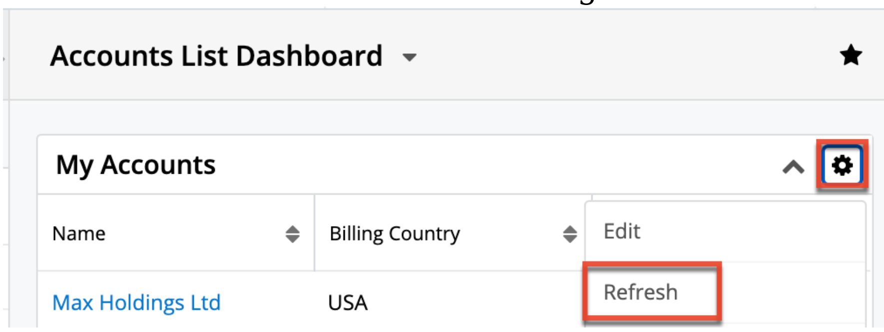


Note: Dashlets can only be resized by the containing dashboard's Assigned To user and system admin users. Any change to a shared dashboard will update the dashboard for all users.

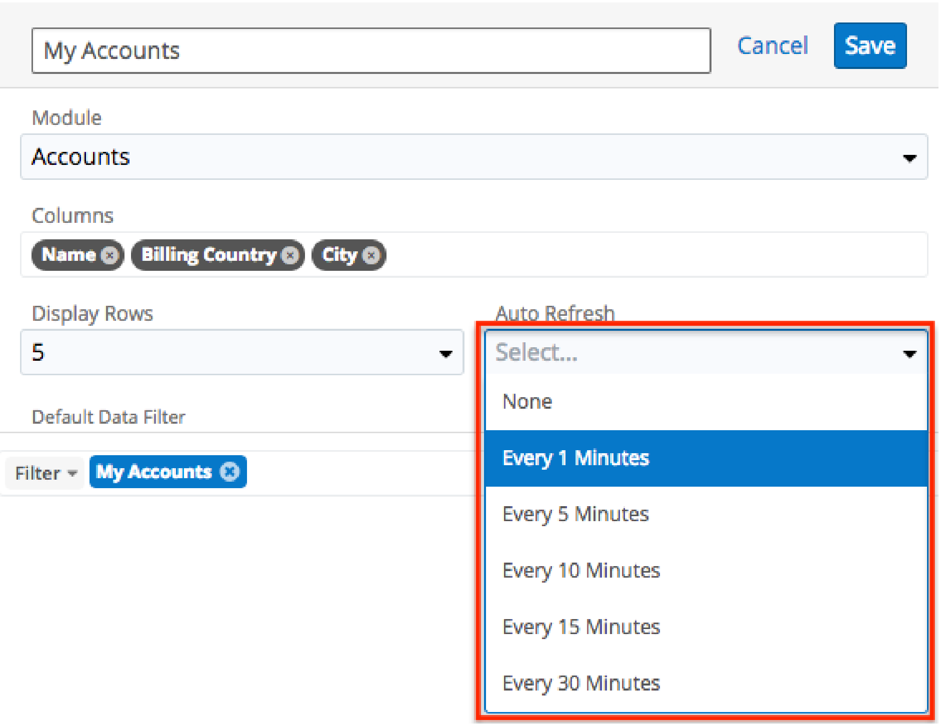
Refreshing Dashlets

When users first navigate to a page in Sugar or refresh the browser window, the page's dashlets all retrieve fresh information. To update dashlet data between page loads, the dashlets themselves must be refreshed. Dashlet refreshes can be performed manually or automatically.

Users can manually refresh a dashlet by clicking the Gear icon at the top of the dashlet menu bar and then selecting "Refresh".



Users can schedule the dashlet to automatically refresh using the Auto-Refresh option. Click the Gear icon at the top of the dashlet menu bar then select "Edit". This will display the Configuration Options page where you can select how often the dashlet should automatically retrieve fresh information.



Note: You may not see the dashlet Gear menus, including the Refresh option, if you are not the containing dashboard's Assigned To user or system admin user.

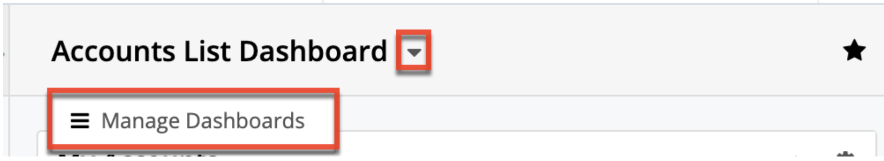
Managing Dashboards

The Dashboards module consists of dashboard records visible in the Dashboards list view and Dashboards record view. Please note that when viewing a dashboard in list view and record view, its dashlets are not visible. Rather, the Dashboards module allows users to share their dashboards with teams of users, pull dashboards to their own views, reassign dashboards, and update select fields on the dashboard record. Admin users are also able to push dashboards to the views of teams of users.

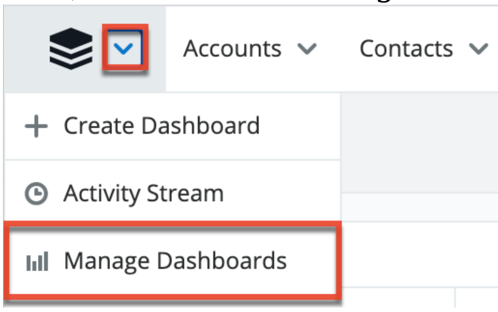
Note: To add dashlets, create/duplicate dashboards, etc., click the floating actions button on the Home page dashboard or list view/record view intelligence pane.

The Dashboards module can be accessed from any record view or list view intelligence pane or from the Home module. Simply select "Manage Dashboards" from the view's dashboard selection list.

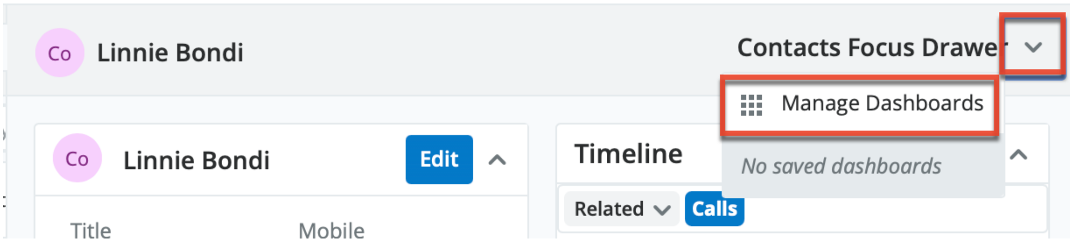
From record view and list view intelligence panes, click the triangle next to the dashboard's name and select "Manage Dashboards".



From the Home page, click the triangle next to the Home module tab (Sugar cube icon) and select "Manage Dashboards".



From the [focus drawer](), click the triangle next to the current dashboard's name (e.g., Contacts Focus Drawer) in the Focus Drawer header and select "Manage Dashboards".



Doing so will open the Dashboards module in list view. The list view will automatically be filtered by the module and view you navigated from so that you can quickly locate dashboards available in that view. To locate other dashboards, simply modify or remove the filters. For more information about filtering list views, refer to the [User Interface]() documentation.

Note: If you do not see the desired dashboard in your Dashboards list view or receive a permissions error when attempting to navigate directly to its record view, you may not belong to one of its designated teams. The dashboard's owner or an admin user will need to update the dashboard's Teams field to grant you access. For more information, refer to the [Team Management]() documentation in the Administration Guide. If the Teams field includes a team to which you belong, confirm that the dashboard's Module and View field match the module and view (e.g., Accounts record view) where you would like it to appear. Each dashboard can only be applied to the module and view where it was originally created. For more information, refer to the [Shared Dashboards]() section above.

Dashboard Module Fields

The Dashboards module includes the following fields. For information on using and editing various field types, refer to the User Interface documentation.

Field	Description
Assigned To	The Sugar user assigned to the dashboard.
Date Created	The date the dashboard record was created.
Date Modified	The date the dashboard record was last modified.
Default Dashboard	Specifies that the dashboard will appear in the specified module and view for all users belonging to the teams selected in the Teams field. **Note**: Only admin users can check or modify the Default Dashboard checkbox.
Module	The module (e.g., Accounts, Opportunities, Home) where the dashboard appears. **Note**: This field is read-only for all users. Dashboards cannot be moved from one module to another.
Name	The name of the dashboard which is displayed in the dashboard selection list.
Teams	The teams whose members have access to the dashboard in the Dashboards module.
View	The view (e.g., "List" for list view and "Record" for record view) where the dashboard appears. **Note**: This field is read-only for all users. Dashboards cannot be moved from one view to another.

Working With the Dashboards Module

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules. The sections following this Working With Dashboards section describe Dashboards-specific behaviors and functionality.

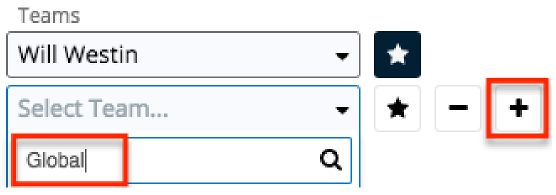
Content Link	Description
Viewing Dashboards Viewing via List View Viewing via Record View	The Viewing Records section describes the various methods of viewing dashboard records, including via the Dashboards list view and record view. **Note**: The Dashboards list view and record view include information about the dashboard but do not display the dashboard's dashlets. Dashboards including their dashlets are visible in intelligence panes and the Home page as described in the Dashboards in Views section.
Searching for Dashboards List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to list view search, which searches and filters within the Dashboards module.
Dashboards List View Total Record Count List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Record Actions Menu More Dashboards	The List View section walks through the many elements of the Dashboards list view layout which contains a filterable list of all dashboard records in Sugar. **Note**: A user can only access a dashboard's record actions menu in list view when they are the assigned user or an admin user.
Dashboards Record View Favorite Designation Next or Previous Record Show More	The Record View section walks through the many elements of the Dashboards Record View layout which contains detailed information about a single dashboard record. **Note**: The Dashboards list view and record view include information about the dashboard but do not display the dashboard's dashlets. Dashboards including their dashlets are visible in intelligence panes and the Home page

	as described in the Dashboards in Views section.
Editing Dashboards Editing Inline via Record View Editing via Record View Editing Inline via List View Mass Editing via List View	The Editing Records section describes the various methods of editing existing dashboard records, including inline via the Dashboards record view, in full edit mode on the record view, inline via the Dashboards list view, and via the Mass Update option on the list view.
Deleting Dashboards Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted dashboards, including via the Dashboards record view, an individual record's Actions menu on the Dashboards list view, and the Mass Actions menu on the list view. Dashboards can also be deleted when viewing them in your intelligence pane or Home page as described in the Deleting Dashboards section.
Favoriting Dashboards Favoriting via List View Favoriting via Record View	The Favoriting Records section describes the various methods of marking dashboards as favorites, including via the Dashboards list view and record view. Marking a non-default dashboard as a favorite makes it available for the user in the specified module and view. For more information, refer to the Pulling Dashboards to Your Views section. Once on a view, dashboards can be de-favorited as described in the Removing Dashboards From Views section.

Sharing Dashboards With Teams

When a dashboard is first created, it is automatically assigned to the creating user and his or her private team. In order to make the dashboard available for others to use, the Teams field must first be updated to grant those users access. Refer to the Teams Access section for more information.

From the Dashboards list view, click a dashboard's name to open it in record view where additional teams can be added to the Teams field. Only the assigned to user and admin users can edit dashboard records, including the Teams field.



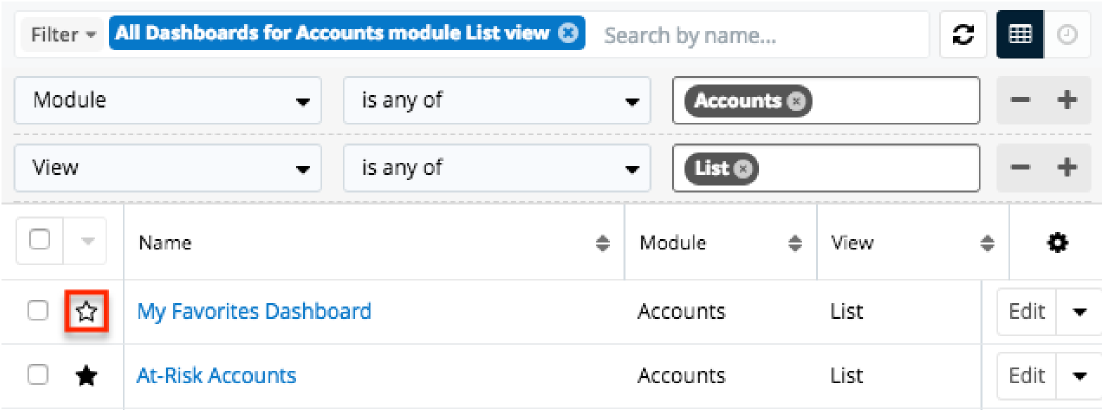
Once a dashboard has been shared with multiple users via the Teams field, those users can then favorite the dashboard to make it visible in their own views. Alternatively, an admin user can check the Default Dashboard field to push the dashboard to the user's views automatically. Refer to the Pulling Dashboards to Your Views and Pushing Dashboards to Teams sections for more information.

When a dashboard contains List View dashlets with custom filters applied, the filters will be shared with all members of the associated team(s). So, when the user views the shared dashboard, the List View dashlet will display a filtered list of records using the shared filter. Please note that users will only be able to see records as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration Guide. Please note that custom filters in the List View dashlet can only be edited by the original dashboard owner and any changes made to the shared filter will be pushed to all users belonging to the associated team(s). If the owner later deletes the filter, the shared filter will be removed from the List View dashlet for all users belonging to the associated team(s), and the dashlet will no longer return results when viewed from the dashboard.

Pulling Dashboards to Your Views

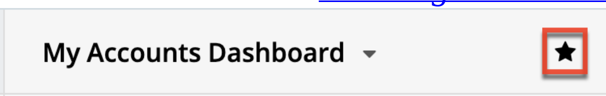
When a user wishes to use a dashboard that is available in their Dashboards module but does not appear in the relevant view's dashboard selection list, they can designate the dashboard as a favorite in order to pull it onto the view. Dashboards a user has marked as favorites will appear for use in the relevant view as prescribed by the dashboard's Module and View fields (e.g., Accounts list view).

1. Navigate to the module and view where you would like to see the shared dashboard.
2. Select the Manage Dashboards option.
3. Locate the dashboard you wish to use.
4. Mark the dashboard as a favorite by clicking the star icon in the list view or record view.



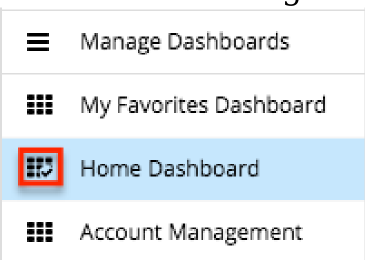
5. Return to the module and view to confirm that the dashboard is now available for selection.

Once a dashboard is a favorite and is available for use, it can be un-marked as a favorite from the Dashboards module or directly from the relevant view in order to remove it from that view's dashboard selection list. Dashboards an admin has marked as default will appear in your views regardless of being a favorite or not, as described in the Pushing Dashboards to Teams section.



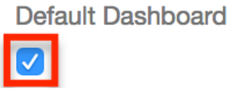
Pushing Dashboards to Teams

Sugar admin users have the ability to push dashboards to the views for teams of users. This is a two-step process that involves first sharing the dashboard with the desired user's teams, then checking the Default Dashboard field. For more information on how the Teams field plays a role, refer to the Sharing Dashboards With Teams section. When the Default Dashboard field is checked, the dashboard will appear on the named module and view's dashboard selection list for every user that has teams access. This effectively pushes the dashboard to users without their involvement. Default dashboards have a checkmark on the standard dashboard icon when viewing them in the selection list on views.



A dashboard can be pushed to its associated teams by updating the Default Dashboard checkbox when editing the record. Only admin users can edit the

Default Dashboard field.

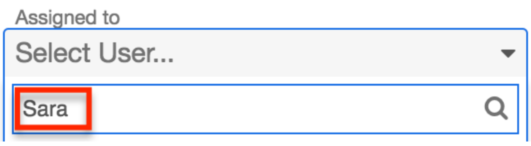


Sugar includes out-of-the-box default dashboards that automatically have "Default Dashboard" checked. Refer to the Out-of-the-Box Default Dashboards section for more information.

Reassigning Dashboards

There are several situations in which you may need to reassign a dashboard record to a different user. Only the Assigned To user and system admin users are able to edit dashboards. Therefore, reassigning the dashboard record will allow a different user to make changes to it. Additionally, because dashboards may be shared amongst multiple users, care needs to be taken before deleting a dashboard or removing a user account's record to Sugar. In both cases, the dashboard should be reassigned to prevent other users from losing access unintentionally.

A dashboard can be reassigned by updating the Assigned To field when editing the record. Only the assigned to user and admin users can edit dashboard records, including the Assigned To field.



When the dashboard is reassigned, the following changes will automatically be made:

- The previous Assigned to user loses the ability to edit the dashboard.
- If the new Assigned To user is not a member of any team in the Teams field, their private team is automatically appended to the Teams field.
- If the previous Assigned to user's private team is selected in the Teams field, it will remain selected so that they continue to have access to the dashboard.

Please note that a custom filter applied to a List View dashlet will not be transferred to the new Assigned To user, but rather shared. So, the new owner can edit the dashlet but will not be able to edit the shared filter in the Configuration Options page. If the applied custom filter is removed from the dashlet, they will not be able to apply the same filter again as they do not own it.

All of a user's assigned dashboards can be reassigned at once using the Reassign Records tool available in the User Management section of the Admin panel. This is especially useful to preserve others' access to a dashboard when a user account is being deactivated. For more information, refer to the User Management documentation in the Administration Guide.

Commonly Used Dashlets

The following sections cover many commonly used dashlets that may appear on your default dashboards (e.g., Home page dashboard, Focus Drawer dashboard) or can be added to your dashboards. Please note that the dashlets available to view and add will vary between the modules in Sugar.

Note: You may not see dashlet Gear menus, including the Edit, Remove, and Refresh options, if you are not the containing dashboard's Assigned To user or system admin user. Any change to a shared dashboard will update the dashboard for all users.

List View Dashlet

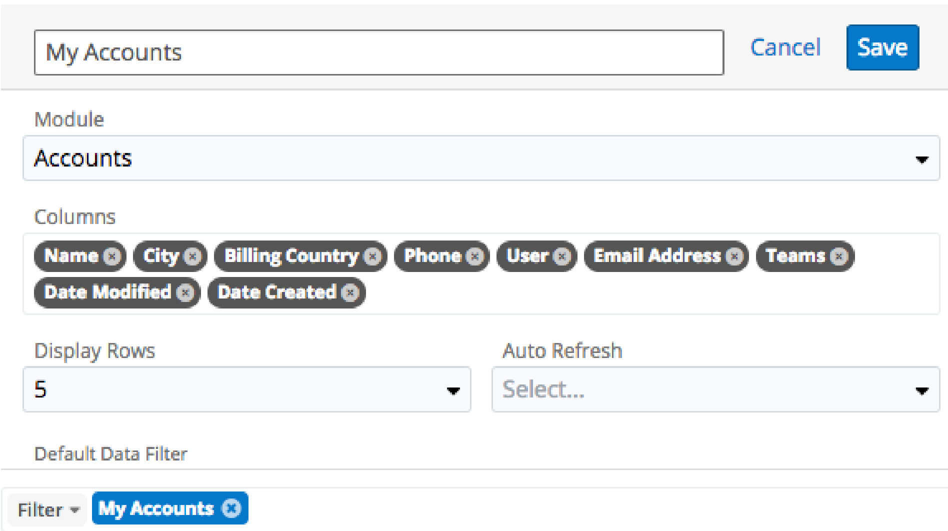
The List View dashlet enables users to view a filtered list of records belonging to a specific module (e.g., Accounts, Contacts, Leads). When configuring the dashlet, simply select the primary module (e.g., Accounts, Contacts, Leads) you wish to view a list of records for along with the filters (e.g., columns, display rows) you wish to apply. Please note that the dashlet title (e.g., My Accounts, My Contacts) will vary based on the primary module selected when adding the dashlet. Certain modules (e.g., Accounts, Contacts, Leads) in Sugar display the List View dashlet by default in their list view's intelligence pane. For example, if you navigate to the Contacts list view, the My Accounts dashlet will appear in the intelligence pane dashboard.

Once added, you can configure the dashlet as necessary by clicking the Gear icon on the upper right if you wish to change the designated module for the dashlet, apply predefined or custom filters, etc. Please note that any changes made by the administrator to the List View layout in Studio affect the list of available fields in the module's list view dashlet layout. The deployed changes will not display automatically in the corresponding module dashlet and users will need to edit the dashlet in order to view the changes in the Columns field, add new fields to the layout, etc. For more information on editing the List View layout in Studio, please refer to the Studio documentation in the Administration Guide.

The following are the most common options available when filtering and configuring the list view dashlet:

- **Title**: Change the displayed name of the dashlet.
- **Module**: Change the module that the dashlet is displaying records from by selecting a different module from the list.
- **Columns**: Choose the field columns you wish to display on the dashlet. To remove a field column, simply click the "x" to the right of the field name.
  Note: The field columns available to add to the dashlet are based on the specified fields in the List View layout in Studio. Any changes made to the List View layout in Studio will be reflected in the Columns field. For more information on configuring the List View layout, please refer to the Studio documentation in the Administration Guide.

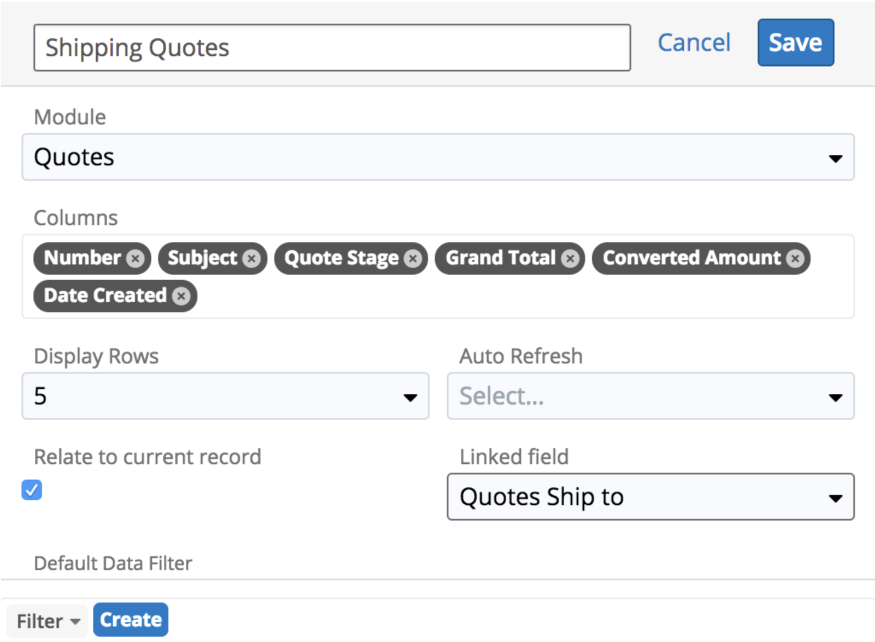
- **Display Rows**: Specify how many rows or results this dashlet will display at once. Please note that the maximum is twenty rows.
- **Auto Refresh**: Choose a time frame to have the dashlet query automatically refresh.
- **Filter**: Click the Filter option to select a pre-defined filter or create a new filter to be applied to the List View dashlet.
  Note: The My filter (e.g., My Accounts) is selected by default.



The following are options that are only available when configuring a list view dashlet on a record view:

- **Relate to current record**: Specify if the dashlet will be filtered to only list records related to the record you are viewing.
- **Linked field**: This field is shown only when "Relate to current record" is enabled; the dropdown will display all of the fields in the selected module that link back to the current record. In most cases, there will only be one field listed, but there are a few exceptions. For example, a Quotes list view dashlet on the Accounts record view can link to quotes where the account is either the billing account or the shipping account. Specify which of these

account fields should link to the current record.

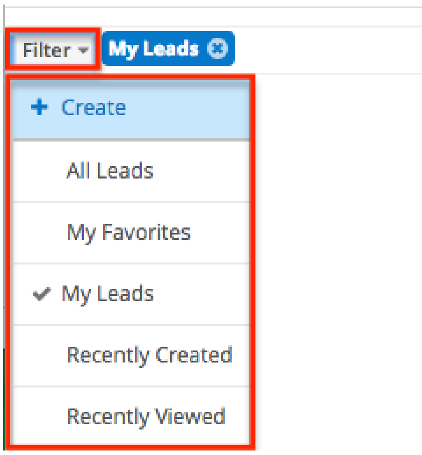


Creating a Filter

The Filters section of the Configuration Options page allows you to filter your dashlet based on pre-defined filters (e.g., My Favorites, Recently Created) as well as create custom filters. For example, if you select "My Contacts" in the Filter options, the List View dashlet will only display contact records that are assigned to you. To see all records to which you have access, simply select the All option in the filter.

The following Filter options are available to filter the List View dashlet:

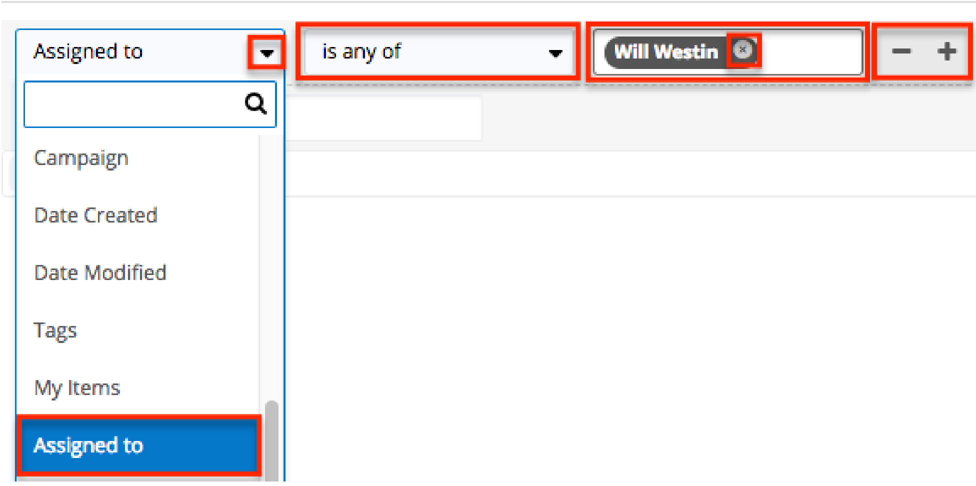
- **Create**: Create a new custom filter which you can use to filter the List View dashlet
- **All "Module"**: Select this filter to display all records in the module to which you have access
- **My Favorites**: Select this filter to only display records you have marked as favorites
- **My "Module"**: Select this filter to only display records assigned to you
- **Recently Created**: Select this filter to only display records you created in the module within the last 7 days
- **Recently Viewed**: Select this filter to only display records you have viewed in the module within the last 7 day



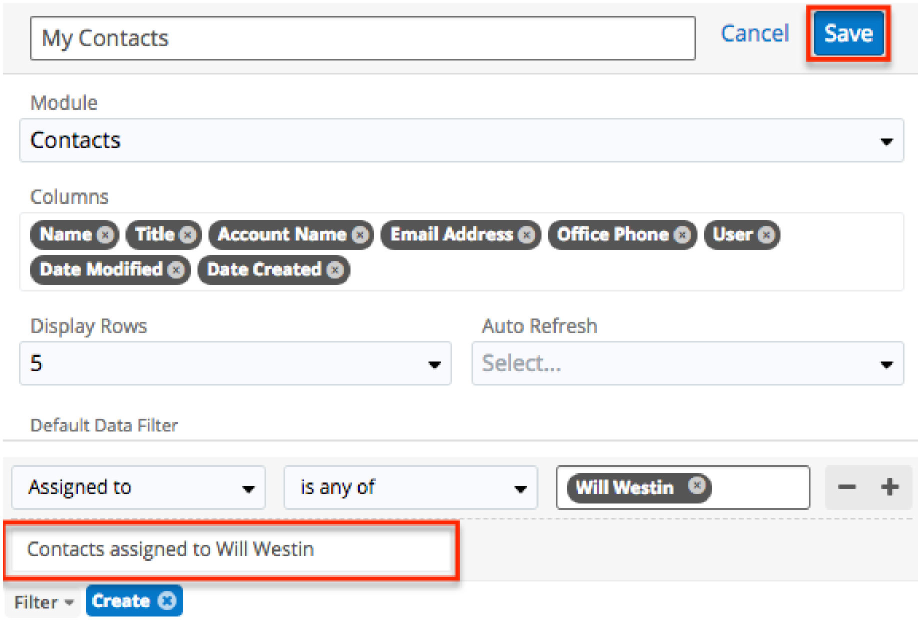
Users can also create new filters via the Create option in the Filter list. This allows users to add custom, complex filter options when filtering the List View dashlet. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists. Please note that each one of the filter's criteria needs to be true for a record in order for it to appear in the List View dashlet. The fields available to filter the dashlet are based on specified fields in the Search layout in Studio. Any changes made to the Search layout in Studio will be reflected in the filter's field dropdown list. For more information on configuring the Search layout, please refer to the Studio documentation in the Administration Guide.

The following steps cover creating a new filter for contacts assigned to Will Westin as an example:

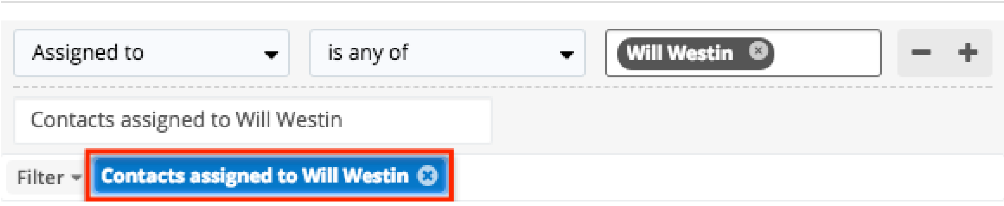
1. Click the Filter option on the Configuration Options page then select "Create".
2. Select the field (e.g., Assigned to) you wish to add to your filter as well as the condition (e.g., is) and matching criteria (e.g., Will Westin).
   Note: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
   - To remove fields from the new filter, click the Minus button to the right of the filter.
   - To clear any filter values (e.g., Will Westin), simply click the "x" to the right of the value.



4. Enter in a name for the new filter (e.g., "Contacts assigned to Will Westin").
5. Click "Save" to add this filter to the dashlet list view's Filter options.



The custom filter will automatically be applied to the dashlet upon save and all records meeting the filter criteria will display. Please note that you can edit the custom filters at any time by selecting the filter (e.g., Contacts assigned to Will Westin) from the Configuration Options page, then clicking the name that appears to the right of the Filter option. Simply make the necessary changes to the custom filter then click "Save" to preserve and apply the changes to the dashlet.



When viewing the List View dashlet, the first set of records meeting the filter criteria will be displayed, and you can click the More link (e.g., More accounts) at the bottom of the dashlet to display additional records. The number of records that load each time you click the link depends on the display row number (5, 10, 15, 20) selected in the Configuration Options page. Simply scroll down the dashlet list view to view all records that are loaded. Please note that dashlets set to display 5 rows will show the dashlet's height increasing slightly when initially clicking the More "Module" link to display more records at once. Any subsequent clicks on the link will load the next set of results and be viewable by scrolling. The More link will no longer appear once all records meeting the dashlet's filter criteria are loaded in the dashlet list view results.

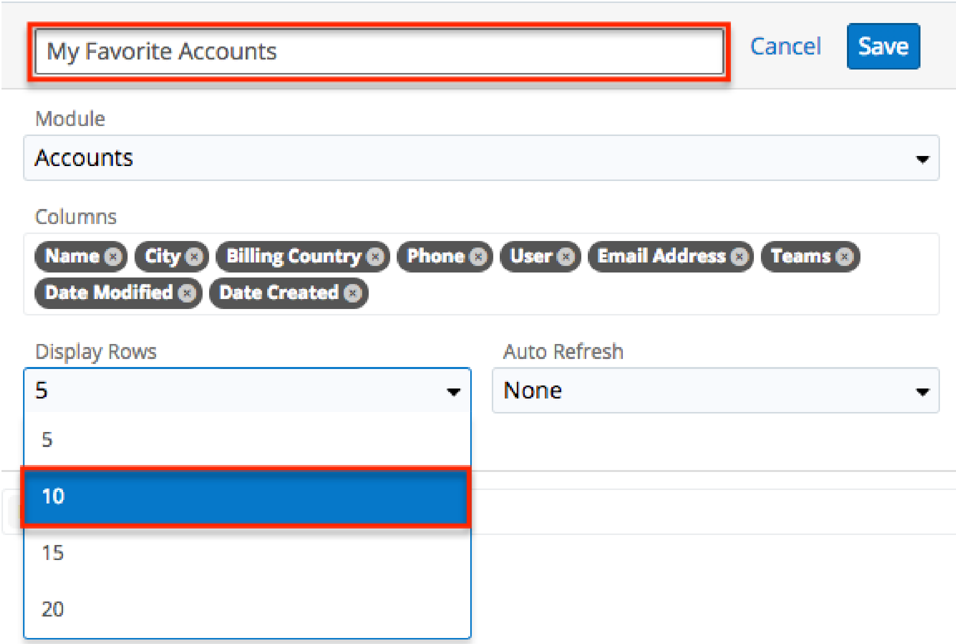
Steps to Edit a Dashlet

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

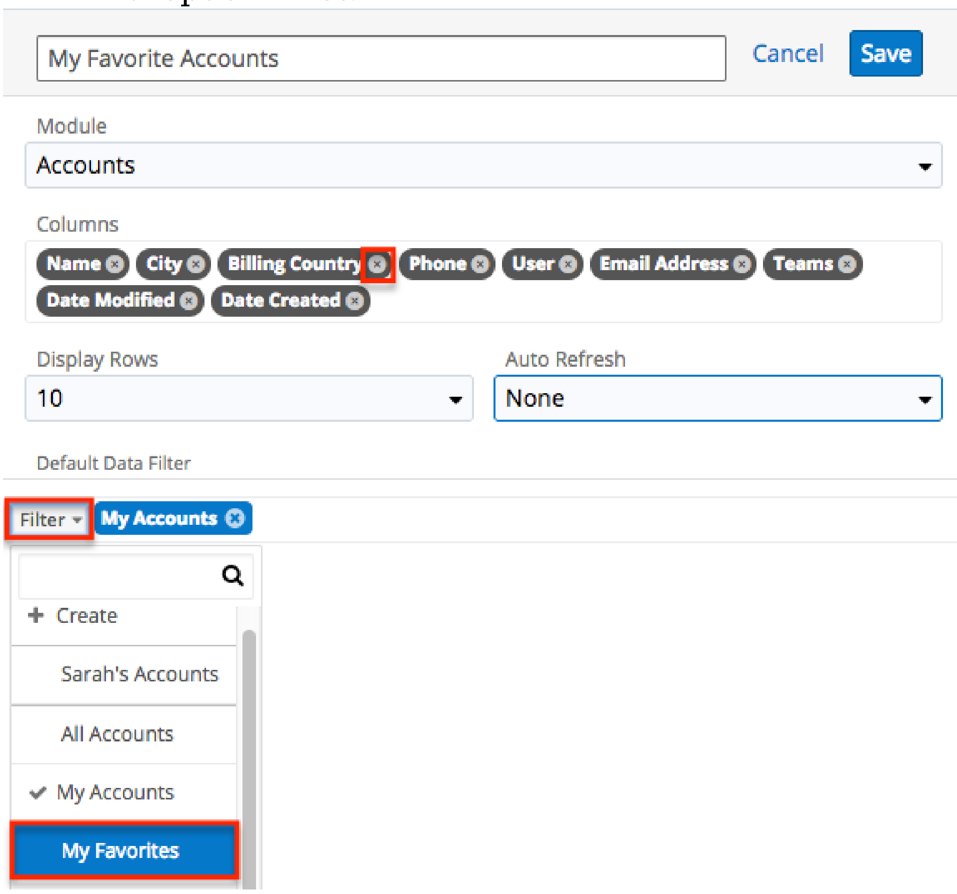
The following steps cover updating the title, display rows, columns, and only my favorites filter for the My Accounts dashlet as an example:

1. Click the Gear icon at the top of the My Accounts dashlet menu bar then select "Edit".


2. Change the "Title" (e.g., My Favorite Accounts) and the display rows from 5 to 10.



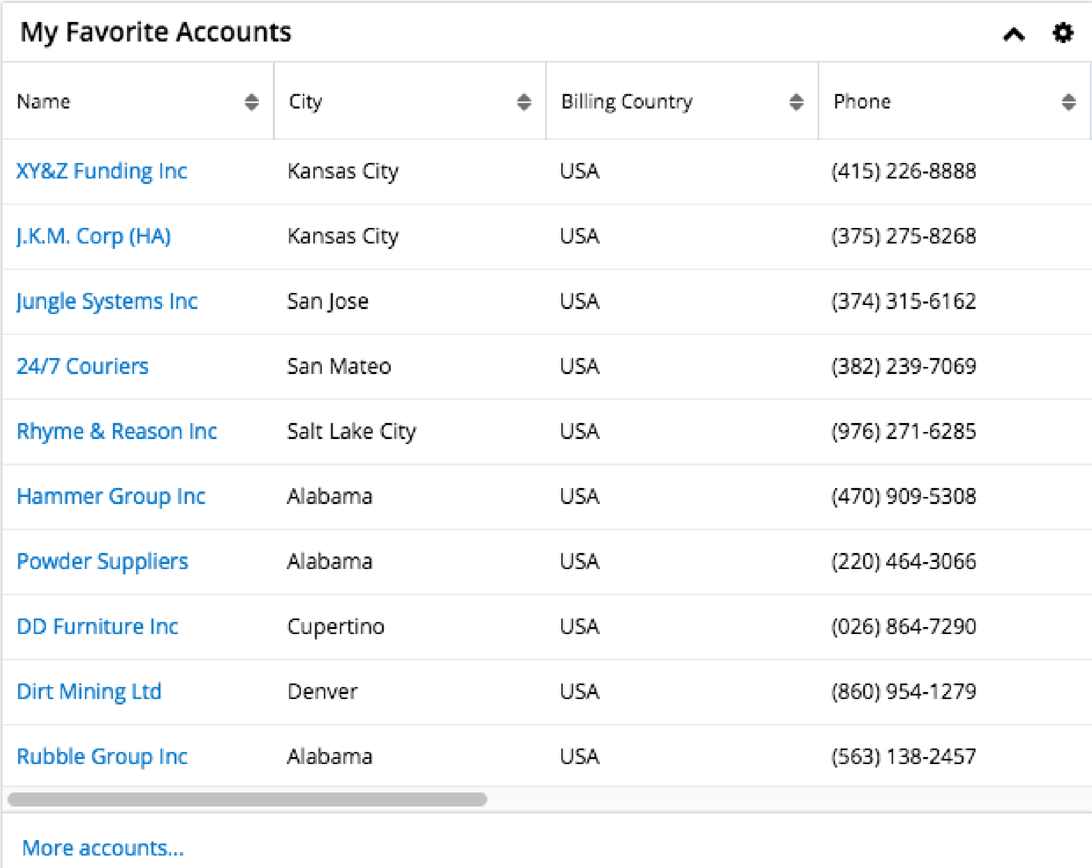
3. Click the "x" next to "Billing Country" to remove the field from the display column.
    - To add columns, simply click your mouse in the Columns field then select from the list of available fields that appear below the dropdown list.



4. Click the Filter option then select "My Favorites".
5. Once the update is complete, click "Save" and the dashlet will reflect the

changes made.

- Click "Save" on the dashboards edit layout to apply the changes to your final dashlet view.



Multiple List View dashlets can be added to the intelligence pane as well if you wish to view the list of records for various modules. For more information on adding dashlets, please refer to the Adding Dashlets section. You can also refresh and remove the dashlet by clicking the Gear icon. To collapse the dashlet, simply click the Up arrow to the left of the Gear icon.

Active Tasks Dashlet

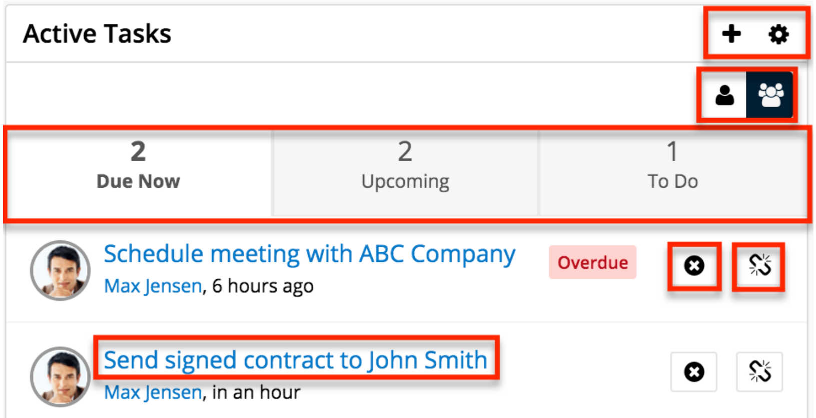
The Active Tasks dashlet allows users to view open tasks that require attention and need to be completed on a future or current date. Open tasks have a status of "Not Started", "In Progress", or "Pending Input". The dashlet is broken up into three tabs: "Due Now", "Upcoming", and "To Do", and displays a number on each tab to indicate the count of open tasks falling into each due-date range.

- **Due Now**: Open tasks that are due today and open tasks where the due date is in the past
- **Upcoming**: Open tasks that have a due date in the future
- **To Do**: Open tasks that have no due date specified

When placed on a user's Home page dashboard, the Active Tasks dashlet will show all active tasks assigned to the logged-in user or all active tasks that the logged-in user has team permission to view, depending on how the user has configured the dashlet's settings.

When the Active Tasks dashlet is placed on the record view for a related module (e.g., Accounts, Contacts), it will only show the active tasks that have a relationship with the current record. For example, if the Active Tasks dashlet is placed on the Account module's record view, when a user views ABC Account, the Active Tasks dashlet will only show the active tasks that are related to ABC Account.

You can close tasks as completed directly from the dashlet by clicking the Completed button to the right of the task's row. In addition, you can delete the task's relationship with the record by clicking the Unlink button to the right of the Completed button.



To access a task's record view, simply click the task's subject in the dashlet. You can also hover over the linked task subject and click the Focus icon to open the focus drawer, which displays a 360-degree view of the linked record through a set of dashlets containing pertinent information. There are two buttons on the upper right of the Active Tasks dashlet which allow you to toggle between viewing tasks assigned to you and all tasks to which you have access. You can click the one person button to quickly view task records for which you are the assigned user. To remove this filter and view tasks assigned to others as well as yourself, simply click the group button to the right of the one person button. You can also relate new tasks to the record by clicking the Plus icon on the upper right of the dashlet and selecting "Create Task". Complete the Tasks record view layout and save to create the new task. The Gear icon to the right of the Plus icon allows you to edit, refresh, close, and remove the dashlet. To collapse the dashlet, click the Gear icon then select the Close option. To expand the dashlet, simply click the Gear icon again and select "Open".

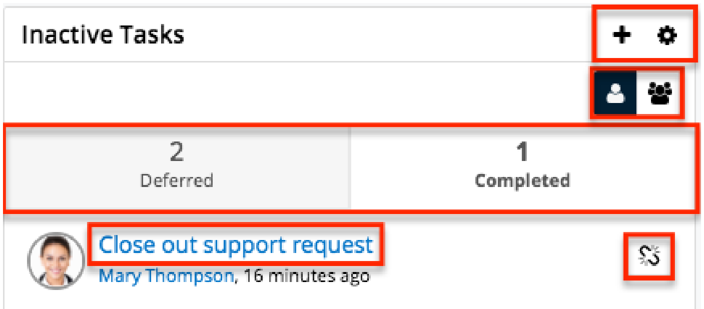
Inactive Tasks Dashlet

The Inactive Tasks dashlet allows users to view tasks that are on-hold or have already been completed. The dashlet is broken up into two tabs, "Deferred", "Completed", and displays a number on each tab to indicate the count of tasks falling into each status.

When placed on a user's Home page dashboard, the Inactive Tasks dashlet will show all inactive tasks assigned to the logged-in user or all inactive tasks that the logged-in user has team permission to view, depending on how the user has configured the dashlet's settings.

When the Inactive Tasks dashlet is placed on the record view for a related module (e.g., Accounts, Contacts), it will only show the inactive tasks that have a relationship with the current record. For example, if the Inactive Tasks dashlet is placed on the Account module's record view, when a user views ABC Account, the Inactive Tasks dashlet will only show the inactive tasks that are related to ABC Account.

You can delete the task's relationship with the record by clicking the Unlink button on the task's row.

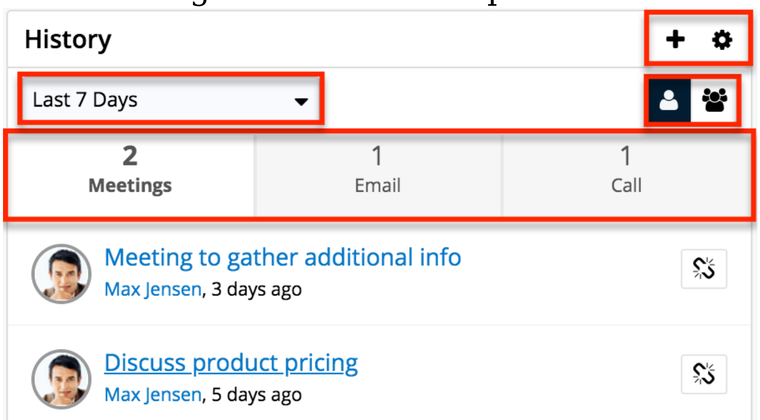


To access a task's record view, simply click the task's subject in the dashlet. You can also hover over the linked task subject and click the Focus icon to open the focus drawer, which displays a 360-degree view of the linked record through a set of dashlets containing pertinent information. There are two buttons on the upper right of the Inactive Tasks dashlet which allow you to toggle between viewing tasks assigned to you and all tasks to which you have access. You can click the one person button to quickly view task records for which you are the assigned user. To remove this filter and view tasks assigned to others as well as yourself, simply click the group button to the right of the one person button. You can also relate new tasks to the record by clicking the Plus icon on the upper right of the dashlet and selecting "Create Task". Complete the Tasks record view layout and save to create the new task. The Gear icon to the right of the Plus icon allows you to edit, refresh, close, and remove the dashlet. To collapse the dashlet, click the Gear icon then select the Close option. To expand the dashlet, simply click the Gear icon again and select "Open".

History Dashlet

The History dashlet allows users to view a history of the record's related activities (e.g., calls, meetings, emails) that have already taken place. The activity types are broken up into three tabs (Meetings, Emails, Calls) and a number on each tab indicates the relevant count of historical activity records. You can also filter (Last 7 Days, Last 30 Days, Last Quarter) the History dashlet to only display a specific subset of the activities meeting the set time frame.

Clicking the Plus icon on the upper right of the dashlet displays the Archive Email option which allows users to manually enter received emails for historical purposes. An explicit relationship is formed between an archived email and the current record while implicit relationships are also created to other records based on any email addresses entered in the email. Simply enter the required information (e.g., Date Sent, From, Subject) along with the email body in the Compose Email window, then click "Archive" to save the email record. Please note that the archived email will display in the record's Emails subpanel as well as in the History dashlet. The Gear icon to the right of the Plus icon allows you to edit, refresh, close, and remove the dashlet accordingly. To collapse the dashlet, click the Gear icon then select the Close option. To expand the dashlet, you can simply click the Gear icon again and select "Open".



Hovering over the linked call, meeting, or email subject will display a Focus icon which can be clicked to open the focus drawer. In addition, there are two buttons on the upper right of the History dashlet which allow you to toggle between viewing the record's activities assigned to you and activities assigned to users in other teams. You can click the one person button to quickly view the record's calls, meetings, and emails for which you are the owner. To view the record's activities for all users on your team, simply click the multi-group button to the right of the one person button.

Planned Activities Dashlet

The Planned Activities dashlet provides users with a list of open or upcoming calls and meetings that are related to the current record you are viewing. The activity types are broken up into two tabs (Meeting, Call) and a number on each tab indicates the relevant count of planned activity records. You can filter the dashlet to view either the current day's scheduled activities or upcoming activities in the future by toggling between the Today or Future button. Please note that any open activities where the start date is prior to the current date will display an Overdue status for the specific activity in the dashlet. Once the activities have taken place or are completed, they will appear within the History dashlet.

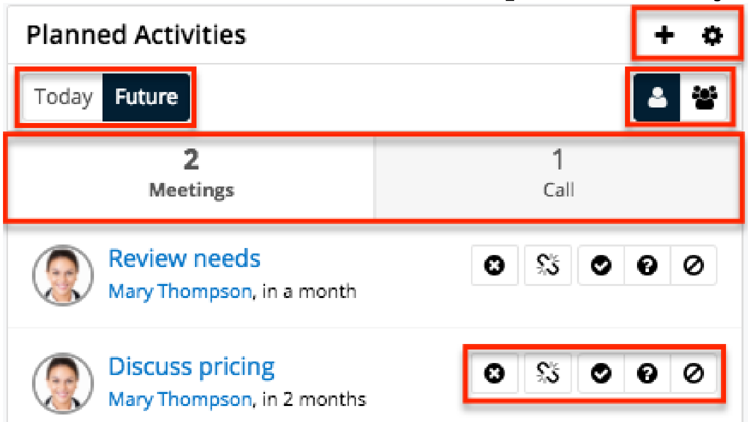
Note: Hovering over the linked call or meeting subject in the dashlet will display a Focus icon which can be clicked to open the focus drawer.

In addition, there are two buttons to the right which allow you to toggle between viewing the record's scheduled activities assigned to you and activities assigned to users in other teams. Please note that you can use both sets of buttons (Today, Future, one person, multi-group) concurrently to further filter and view the information you need. For example, you can click the one person button plus the Future button if you wish to view all upcoming activities specifically assigned to you for the current record.

To create a new meeting or call, simply click the Plus icon on the upper right of the dashlet and select either "Schedule Meeting" or "Log Call". Once the Meeting or Call record view layout opens, enter the necessary information and click "Save" to create the activity. For more information on creating calls and meetings in Sugar, please refer to the Creating Records section of the User Interface documentation.

The Gear icon on the upper right of the dashlet allows you to edit, refresh, close, and remove the dashlet accordingly. To collapse the dashlet, click the Gear icon then select the Close option. To open up the dashlet, you can simply click the Gear icon again then select "Open".

To the right of the meeting and call record's row is a set of buttons that allow you to mark the activity as held, delete the call or meeting's relationship with the current record, as well as accept, tentatively accept, or decline the call or meeting.



Calendar Scheduler Dashlet

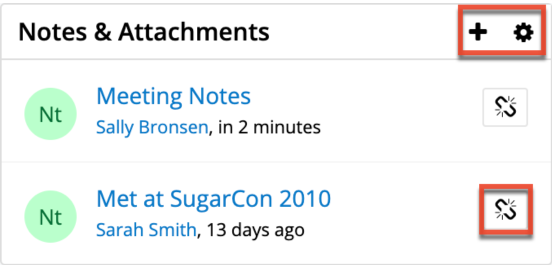
The Calendar Scheduler dashlet provides users with a way to show event calendars throughout Sugar. You can choose which calendars to show on each dashlet and which view to display (e.g., day or week view). For more information on using the Calendar Scheduler dashlet, refer to the Calendar documentation.

Notes & Attachments Dashlet

The Notes & Attachments dashlet allows users to relate an existing note as well as a new note record to the module record. To create a new note, click the Plus icon on the upper right of the Notes & Attachments dashlet then select "Create Related Record". Once the Notes record view layout opens, enter the necessary information then click "Save". For more information on creating notes, please refer to the Creating Records section of the User Interface documentation. To relate an existing note, click the Plus icon then select "Link Existing Record". The Search and Select Notes page will open allowing you to select the note record you wish to relate to the module record.

To delete the record's relationship to a note record, click the Unlink button to the right of the attached note post. Please note that this removes the relationship, but does not delete the record itself.

The Gear icon on the upper right of the dashlet allows you to edit, refresh, close, and remove the dashlet accordingly. To collapse the dashlet, click the Gear icon then select the Close option. To open up the dashlet, you can simply click the Gear icon again then select "Open".

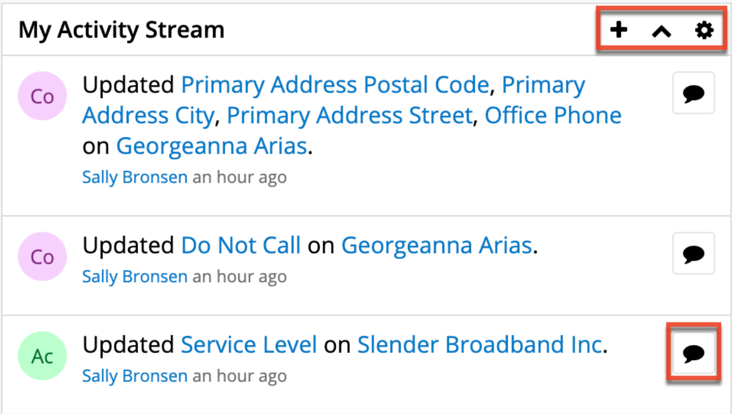


My Activity Stream Dashlet

The My Activity Stream dashlet displays the user's main Activity Stream within a dashboard, eliminating the need to navigate to the Activity Streams view to monitor the most recent stream activities. Like other Activity Stream views, the dashlet supports inline commenting on specific stream activities, but it does not allow record previews. For more information on Activity Streams, please refer to the Activity Streams documentation.

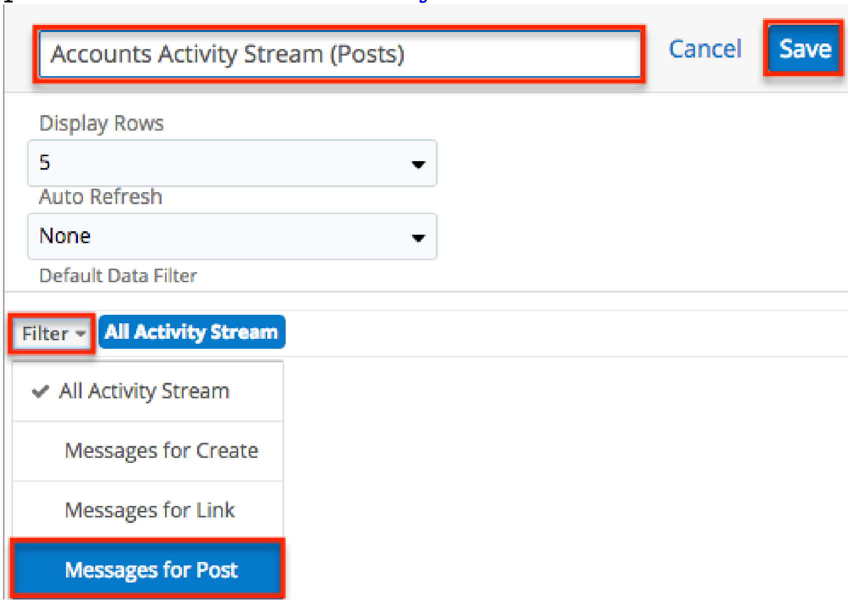
Note: Activity Streams are disabled by default. If you cannot access activity streams, the feature may be enabled via Admin > System Settings. For more information, refer to the System documentation in the Administration Guide.

The Gear icon on the upper right of the dashlet allows you to edit, refresh, and remove the dashlet accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon. To open up the dashlet, you can simply click the arrow again.



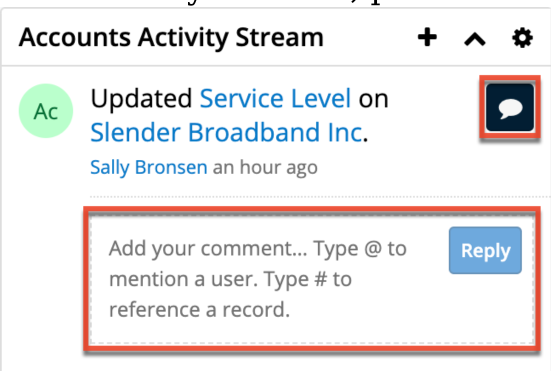
When added to an Intelligence Pane, the My Activity Stream dashlet will display stream items in context to the data within the main container of the page. For example, if you add the dashlet to a dashboard on the main Accounts module page, the main container of the page contains the Accounts list view. Therefore, the My Activity Stream dashlet will restrict activity stream items to only those activities related to the Accounts module. Similarly, if the dashlet is added to the Opportunity module's Intelligence Pane, the My Activity Stream dashlet will restrict activity stream items to only those activities related to the Opportunities module. If the My Activity Stream dashlet is added to any record view's Intelligence Pane dashboard, the dashlet will restrict activity stream items to only those activities related to the record displayed in the main container on the page.

To filter the My Activity Stream dashlet, edit the dashlet and click once on the Filter button. Choose any of the pre-defined Activity Stream filters, such as "Messages for Post", which will restrict the stream to only items that were posted by users, and then click "Save". For more information on Activity Stream filters, please refer to the Activity Streams documentation.



It is good practice to also rename an edited dashlet accordingly so that it is clear that this dashlet is displaying a filtered view. To change the dashlet's title, edit the dashlet, type a new name into the text box that contains the words "My Activity Stream", and then click "Save".

To add a comment or reply to the Activity Stream via the My Activity Stream dashlet, click on the Comment button next to the relevant stream entry, type your reply, and then press the Reply button. For more information about interacting with Activity Streams, please refer to the Activity Streams documentation.



Leads Conversion Prediction Dashlet

When the Lead Prediction model is enabled for SugarPredict, the Leads Conversion Prediction dashlet is available to add to the Leads record view dashboard. The dashlet contains information specific to the lead you are viewing in terms of the likelihood it will convert. For information, refer to the SugarPredict User Guide for Sugar Sell documentation.

Opportunity Close Prediction Dashlet

When the Opportunity Prediction model is enabled for SugarPredict, the Opportunity Close Prediction dashlet is available to add to the Opportunities record view dashboard. When viewing an opportunity record, the dashlet shows the likelihood of the opportunity being closed-won. For information, refer to the SugarPredict User Guide for Sugar Sell documentation.

Opportunity Metrics Dashlet

The Opportunity Metrics dashlet appears in the intelligence pane of the Accounts record view. It provides information regarding opportunities related to the account that are won, lost, and active along with the relevant dollar amounts. The donut chart within the dashlet shows the breakdown of the opportunities by status and displays the total count of opportunities related to the current record you are viewing. The chart is color-coded based on the chart key to represent the won, lost, and active opportunity status.

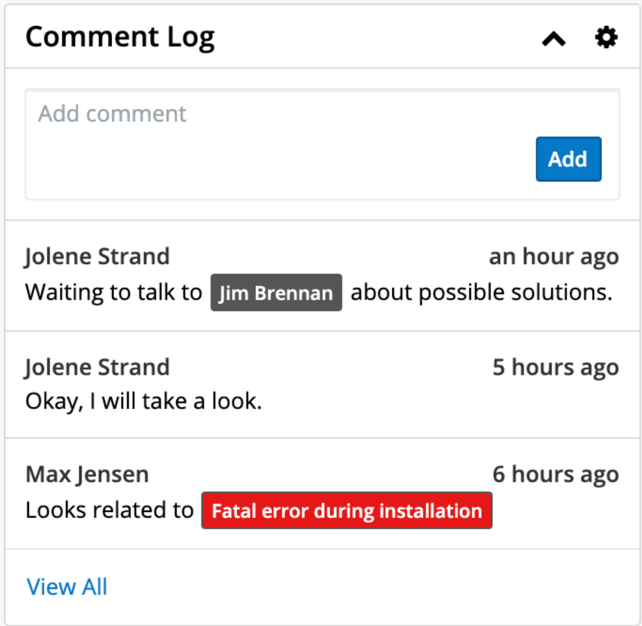
Note: The Opportunity Metrics dashlet is not available for Sugar Serve users. For more information on license types and the functionality available for each, refer to the User Management documentation.

The Gear icon on the upper right of the dashlet allows you to edit, refresh, and remove the dashlet accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon. To open up the dashlet, you can simply click the arrow again.

Note: Dashlet Gear menus, including the Edit, Refresh, and Remove options in the Opportunity Metrics dashlet, are only available to the containing dashboard's Assigned To user and system admin users.

Comment Log Dashlet

The Comment Log dashlet is available to add to Sidecar record views and displays the contents of the Comment Log field for the current record. It lists the entries in descending order with the newest at the top. You can also quickly create new entries by typing in the open text box then clicking the "Add" button. The dashlet shows the three most recent entries but you can open the rest of the entries by clicking "View All". If another user adds an entry while you are viewing the dashlet, you must refresh the dashlet to see the new entry. The Comment Log dashlet is also included automatically in the Renewals Console. Please note that the dashlet is not available in Sugar Professional. For more information about comment logs including mentioning records and users, refer to the User Interface documentation.

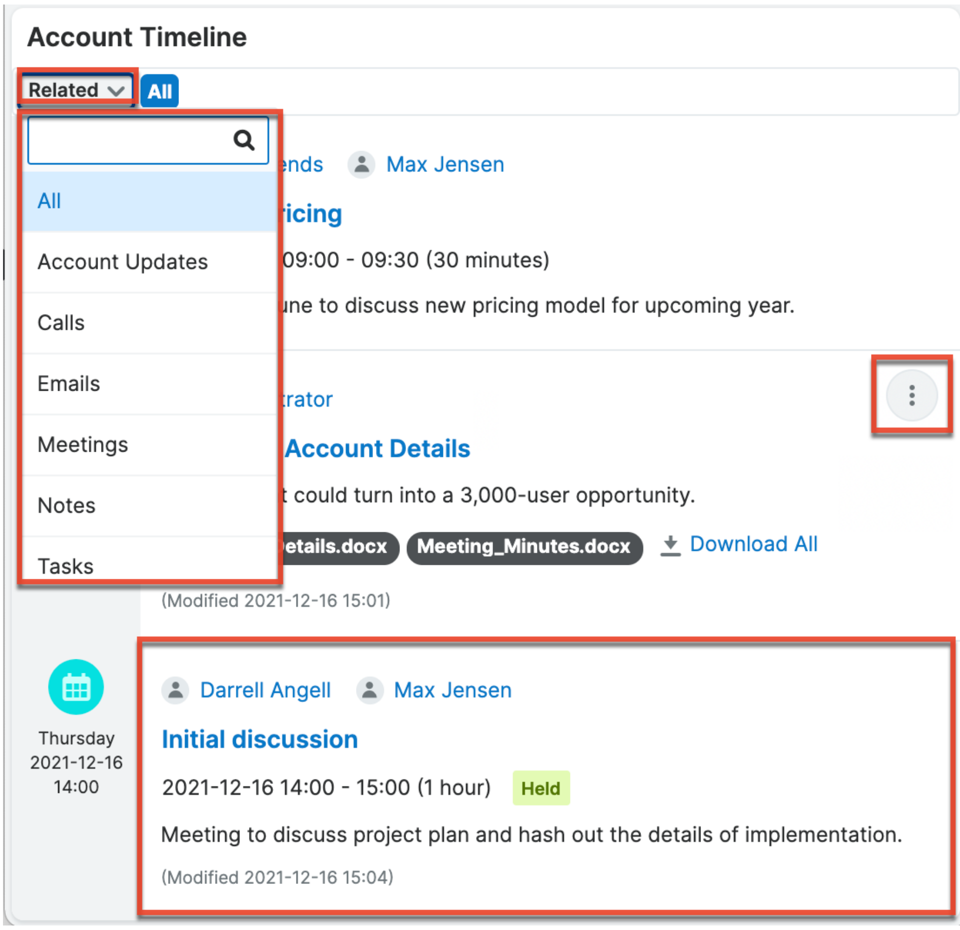


Timeline Dashlet

Note: The Timeline dashlet was known as the Interactions dashlet in Sugar versions 11.0.x and lower and is not available for Sugar Professional.

The Timeline dashlet appears in the Accounts, Contacts, Escalations, Leads, Opportunities, and Quotes record view dashboards, as well as in the Renewals Console. It displays the current record's related activities and select field updates (e.g., a change to the Assigned To field) in the form of record cards. Each card in the dashlet is sorted in chronological order based on the date they occur or are due (for tasks), with the most recent at the top. By default, the Timeline dashlet will display the first set of twenty record cards and you can click "Show more..." to load the next set of cards. If the Timeline dashlet displays "No Activity", then there are no activity records related to the current record and no tracked field changes have been made.

You can also filter the Timeline dashlet to show only certain card types by clicking on "Related" below the dashlet header and selecting the desired card type. To see all of the current record's related activities and select field updates, select "All" in the Related options.



When you hover over a card, an Actions menu, represented by three vertical dots, appears and contains additional options for each type of record card.

The different record cards and their available actions are described below:

Record Card Type	Content Options	Actions Menu Options
Call card	• Click the guest's name to open the employee, contact, or lead record • Click the subject to open the call record • Click "More" or "Less" to expand or collapse the description text • View Customer Sentiment [1]	• Open the focus drawer for the call • Unlink the call from the current record
Email card	• Click the sender or	• Reply, reply-all, or

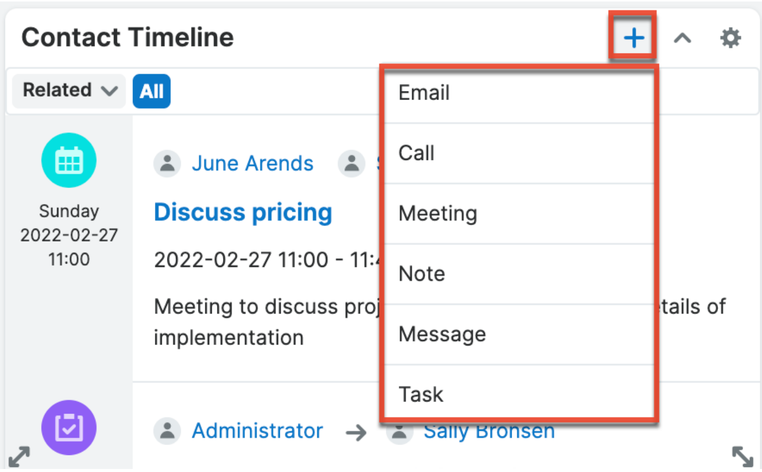
	recipient to open the employee, contact, or lead record • Click the subject to open the email record • Click "More" or "Less" to expand or collapse the email body text • Click the attachment pill to download	forward • Open the focus drawer for the email • Unlink the email from the current record (not available for Archived emails)
Message card [2]	• Click the guest's name to open the employee, contact, or lead record • Click the subject to open the message record • Click "More" or "Less" to expand or collapse the description text	• Open the focus drawer for the message • Unlink the meeting from the current record
Meeting card	• Click the guest's name to open the employee, contact, or lead record • Click the subject to open the meeting record • Click "More" or "Less" to expand or collapse the description text	• Open the focus drawer for the meeting • Unlink the meeting from the current record
Note card	• Click the username to open the employee record • Click the subject to open the note record • Click "More" or "Less" to expand or collapse the	• Open the focus drawer for the note • Unlink the note from the current record

	description text • Click the attachment pill to download the individual file • Click the Download/Download All link to compress files into a .zip file	
Task card	• Click the username to open the employee record • Click the subject to open the task record • Click "More" or "Less" to expand or collapse the description text	• Open the [focus drawer]() for the task • Unlink the task from the current record
Update card [3]	• Click the username to open the employee record	

[1] For instances with call transcripts set up, add the Customer Sentiment field to preview view for the Calls module in order to display the information on the Call card.
[2] Message cards are only shown in the Timeline dashlet if the Start Date field is populated on the message.
[3] The tracked fields are Assigned To and Status on lead records and Sales Stage on opportunity records. Note that the field must be enabled for audit at the time the update occurs for it to appear in the Timeline dashlet.

Creating Activities via Timeline

You can create new activities directly from the Timeline Dashlet by clicking the Plus (+) icon in the dashlet header and selecting the type of record you wish to create. A quick-create drawer will open where you can enter the activity's details; the new activity will be automatically related to the record open in the adjacent record view.



Refer to the Calls, Emails, Messages, Meetings, Tasks, and Notes documentation for more information on creating these records.

Editing Timeline Card Layouts

The fields shown for each card in the Timeline are based on the Preview layout for the corresponding module. An administrator can remove a field from a Timeline dashlet card by removing the field from the Preview layout for the card's module via Admin > Studio > {Module} > Layouts > Preview. For more information on editing the Preview layout, please refer the Layouts documentation in the Administration Guide.

Timeline Dashlet with Sugar Market

If your Sugar instance is integrated with Sugar Market, you can configure the Sugar Market sync settings to show the full customer journey in the Timeline Dashlet on Account, Lead, and Contact record view dashboards. The Sugar Market activities will be chronologically juxtaposed with the record's CRM activities, offering an uninterrupted view of the entire customer journey. Please refer to the Sugar Market Integration Guide for more information.

Record View Dashlet

The Record View dashlet is available to add to all Sidecar modules except Emails and Forecasts. Admin users can configure the Record View Dashlet layout for all supported Sidecar modules as well as any custom modules via Admin > Studio.

The Record View dashlet is also included automatically in the Renewals Console and SugarLive. In SugarLive, it includes an additional Link button to allow agents to quickly relate a contact or case to the ongoing chat or call.

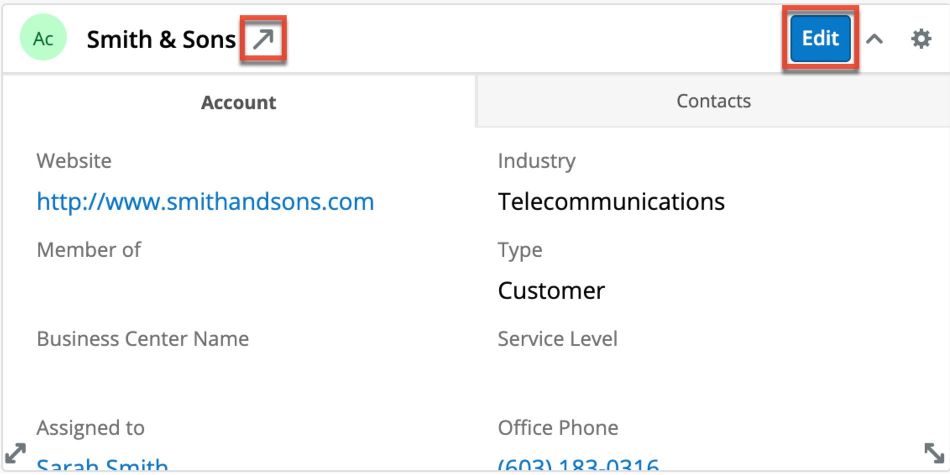
Note: The Record View Dashlet is not available for Sugar Professional.

The Record View dashlet uses a tabbed view to allow users to see records related to the one they are viewing. Depending on the nature of the relationship, you will see related record(s) as either a detailed record view or a list view layout:

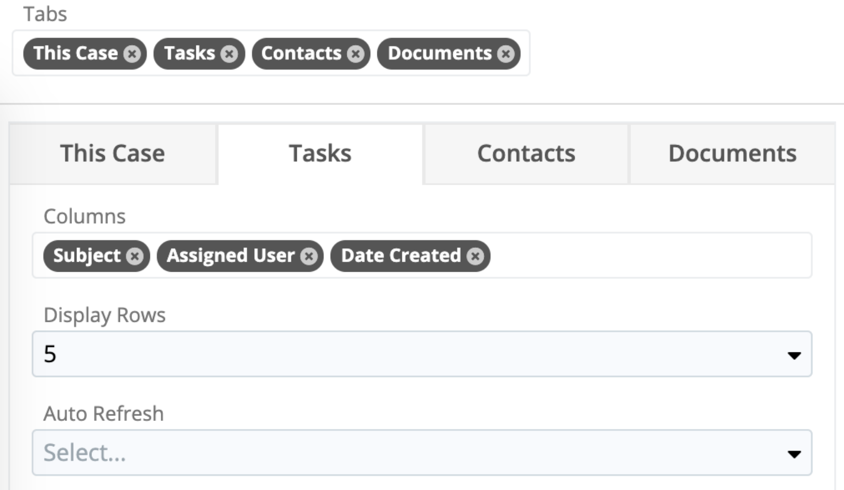
- If the current record can only be related to one record in the dashlet's selected module (i.e., one-to-one and many-to-one relationships), the dashlet will display the detailed record view for the one related record.
- If the current record may be related to many records in the dashlet's selected module (i.e., one-to-many and many-to-many relationships), a list view is displayed even if there is only one related record to show.

Users can configure up to six related modules in the dashlet's tabs. To open a different tab, click the name of the tab across the top. When viewing a single record tab, the record can be edited directly in the dashlet by clicking an individual field or clicking the Edit button. Once you are done editing, click the Save button to preserve your changes. Additionally, an Actions menu is available in the Record View dashlet for modules that can be escalated (i.e., Accounts and Opportunites). For more information, refer to the Escalations documentation. If you wish to access the record's (e.g., accounts) full-page record view, simply hover over the record's name in the single-record Record View dashlet tab, and click the arrow icon that appears to navigate to the record.

Note: Hovering over links to Sidecar module records (e.g., contacts, emails, calls) in the dashlet will display a Focus icon, which can be clicked to reveal a focus drawer.

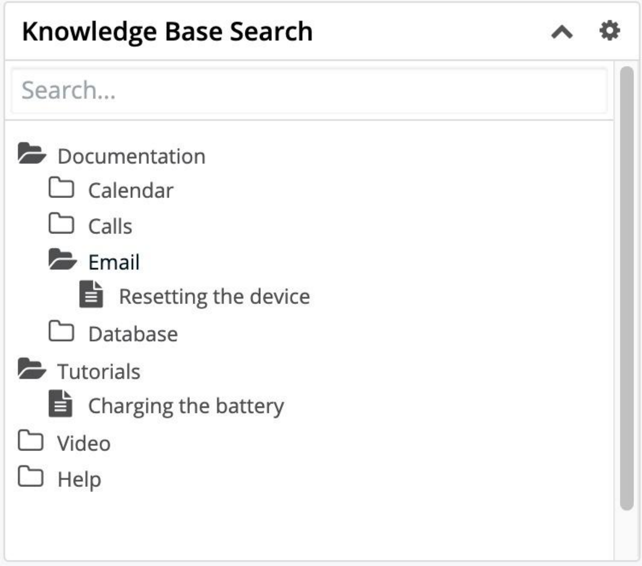


To configure the tabs on the dashlet, click the Gear icon in the top right corner and select "Edit". On the screen that opens, you can specify which tabs you would like displayed in the dashlet by selecting the desired modules in the Tabs field on top. The first option will start with the word "This" and represents a record view tab of the record currently in focus. When applying the dashlet to a record view, it is recommended to remove the "This..." tab so that information is not duplicated on the screen and a related records tab can be shown first. Click the Tabs field to select more tabs or click a tab's X icon to remove it. Beneath the Tabs field, a preview of the dashlet is available. Clicking each tab allows you to view how the tab will be displayed and, for list view tabs, allows you to configure the tab. You can specify which columns to display, how many rows to display, and how often the list view data should be automatically refreshed. Tabs showing a single record cannot be configured in the dashlet as they are controlled by the module's Record View Dashlet layout which can be configured by admin users in [Studio].



Knowledge Base Search Dashlet

The Knowledge Base Search dashlet gives you quick access to published knowledge base articles in the [Knowledge Base] module via a search bar and a tree-based view and is available to add to any dashboard in Sugar. The search bar lets you find articles with matching titles or contents; to search, simply enter a keyword and a dropdown will appear containing matching articles. Below the search bar, you can see a tree-based view showing the structure of the knowledge base. Here, you can navigate through the folders to browse published articles in specific categories and click articles to open them. Clicking an article in the search results or the tree-based view opens it in a new browser tab.

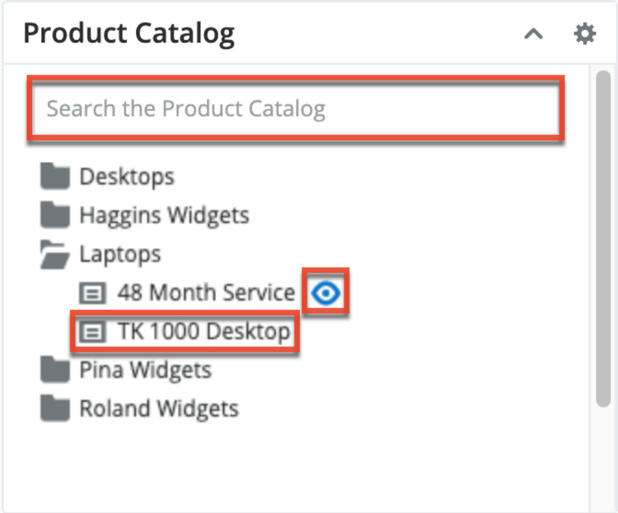


Product Catalog Dashlet

The Product Catalog dashlet allows users to easily access the Product Catalog and instantly add products from the catalog as line items on opportunities and quotes. The dashlet appears to the right of the page when creating a new opportunity or quote, and also in the Opportunities and Quotes record view intelligence pane. For more information on utilizing the Product Catalog dashlet in these modules, refer to the Opportunities and Quotes documentation.

Note: Only products with a status of "Active" are displayed in the Product Catalog dashlet.

You can also access the Product Catalog from other Sidecar modules (e.g., Home, Accounts) simply by adding the Product Catalog dashlet to the intelligence pane dashboard. Please note that unlike the Opportunities and Quotes modules, the Product Catalog dashlet will be read-only when added to other modules (excluding Accounts). You can search for products using the Search field on the dashlet as well as view details of the Product Catalog record by clicking the blue Preview icon to the right of a product's name. When viewing the details of the record, you can mark the product as a favorite by clicking the star icon on the upper left of the product catalog's record view. Once the product is marked as a favorite, it will appear in the Product Catalog Quick Picks dashlet on opportunities and quotes. When accessing the Product Catalog dashlet in the Accounts module, you can select a product from the dashlet to add as a revenue line item to the account's related opportunity. Simply click the card icon or product name in the dashlet then enter appropriate values in the Revenue Line Items record view form. Once the necessary information is entered, click "Save", and the revenue line item will appear in the Revenue Line Items subpanel in the account's record view.

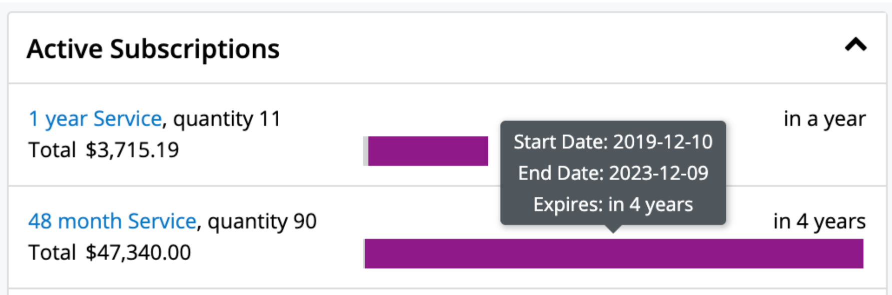


Active Subscriptions Dashlet

The Active Subscriptions dashlet is available by default in the [Renewals Console] and can be added to the record view dashboard of any module, custom or stock, that has one of the following:

- A one-to-one or many-to-one relationship to the Accounts module
- A relate field targeting the Accounts module

The dashlet shows a list of all of the current account's purchases that are marked "Service", have a start date in the past, and an end date in the future. The dashlet shows each purchase's name, quantity of units, and purchased line item calculated revenue amount next to "Total". A simple bar chart visualizes the time elapsed and time remaining for the subscription, which you can explicitly view by hovering your mouse over the bar. To learn more, review the [Purchases and Purchased Line Items] documentation.



Purchase History Dashlet

The Purchase History dashlet is available to add to the Renewals Console and can be added to the record view dashboard of any module, custom or stock, that has one of the following:

- A one-to-one or many-to-one relationship to the Accounts module
- A relate field targeting the Accounts module

The dashlet shows all of the current account's purchases regardless of the start or end date of the purchase record. The dashlet shows each purchase's name, date range, quantity, and total. Clicking the purchase name takes you to the purchase record view. The number of purchased line item records related to the purchase is shown above the total and can be expanded or collapsed to display or hide the purchased line item records. When expanded, the purchased line item records are displayed with their respective date ranges, quantities, and line item totals. Clicking the date ranges takes you to the purchased line item record view.

Note: You can hover over the linked purchase name or date (for purchased line items) and click the Focus icon to reveal the Focus Drawer dashboard, which displays a 360-degree view of the linked record through a set of dashlets containing pertinent information.

Searching and Sorting Purchase Records

The purchase records displayed in the Purchase History dashlet can be searched and sorted to make records easier to find. Search and sort can be used separately or together and will be applied to all of the related account's purchases, not only those visible in the dashlet's default view.

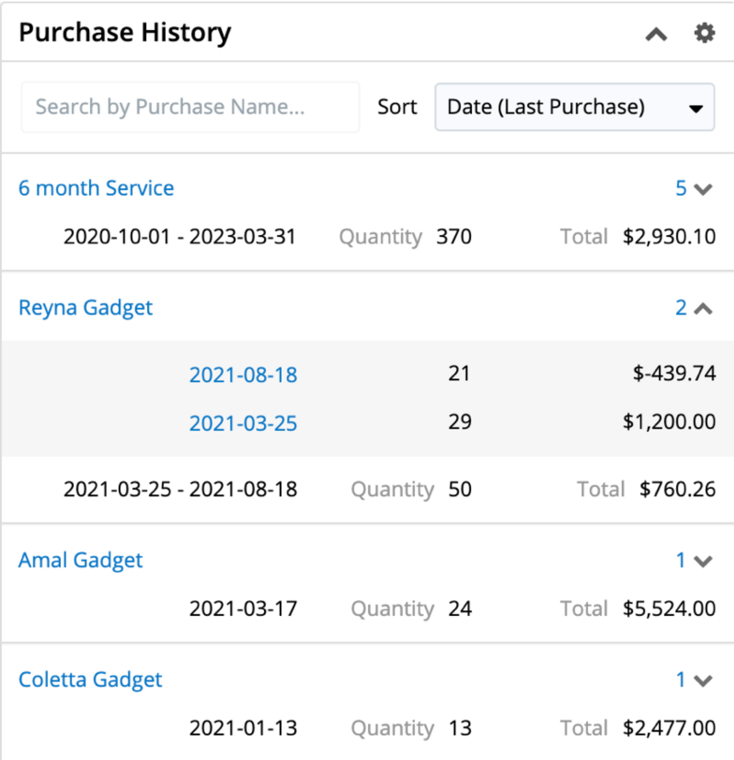
The dashlet search bar uses a partial string match, meaning it will return records that contain the letters you type anywhere in the name, and displays matching results as you type. For example, searching for the string "widget" would return both "Camping Widget" and "Fishing Widget". To clear the search results, click the "x" in the right side of the search bar.

When sorting the records, you have the option to sort by the following:

- **Date (Last Purchase)**: The default sort order that displays purchases in descending order based on the value in the purchase's End Date field.
- **Date (First Purchase)**: Displays purchases in ascending order based on the value in the purchase's End Date field.
- **Price (Highest Total)**: Displays purchases in descending order based on

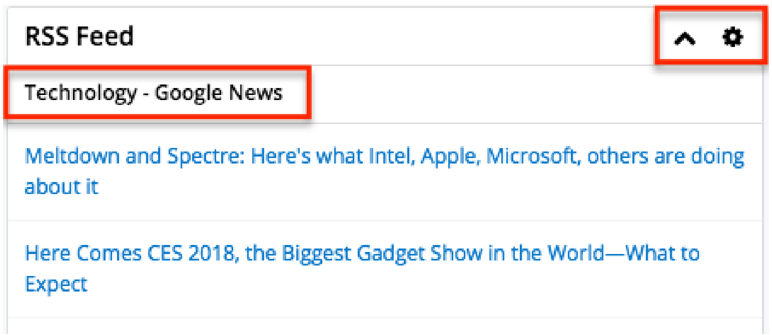
the value in the purchase's Total Revenue field.

- **Price (Lowest Total)**: Displays purchases in ascending order based on the value in the purchase's Total Revenue field.



RSS Feed Dashlet

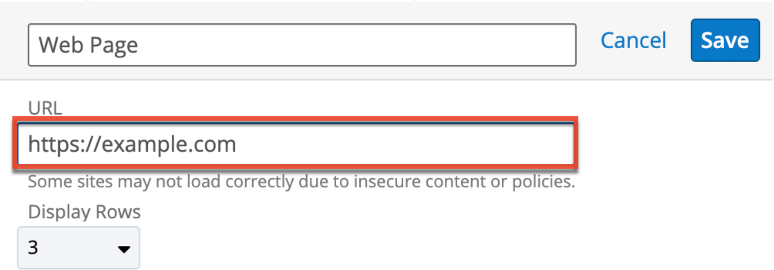
The RSS Feed dashlet allows you to view external RSS or Blog feeds via the dashboard on the intelligence pane. When adding the dashlet, you will need to enter in the desired feed URL (e.g., "https://news.google.com/news/headlines/section/topic/TECHNOLOGY?ned=us&hl=en&gl=US") in the Feed URL field. You can also select a value in the "Number of entries to show" field to display the most recent 5, 10, 15, or 20 entries from the feed and specify an auto-refresh interval (e.g., Every Hour) if desired. Once the dashlet is added to the intelligence pane, the applicable feeds will display and you can click the title of each feed to access the full story on the parent site. If you wish to access the full site where the RSS feeds originate from, simply click the title (e.g., Technology - Google News) below the dashlet header.



The Gear icon on the upper right of the dashlet allows you to edit, refresh, and remove the dashlet accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon. To open up the dashlet, you can simply click the arrow again.

Web Page Dashlet

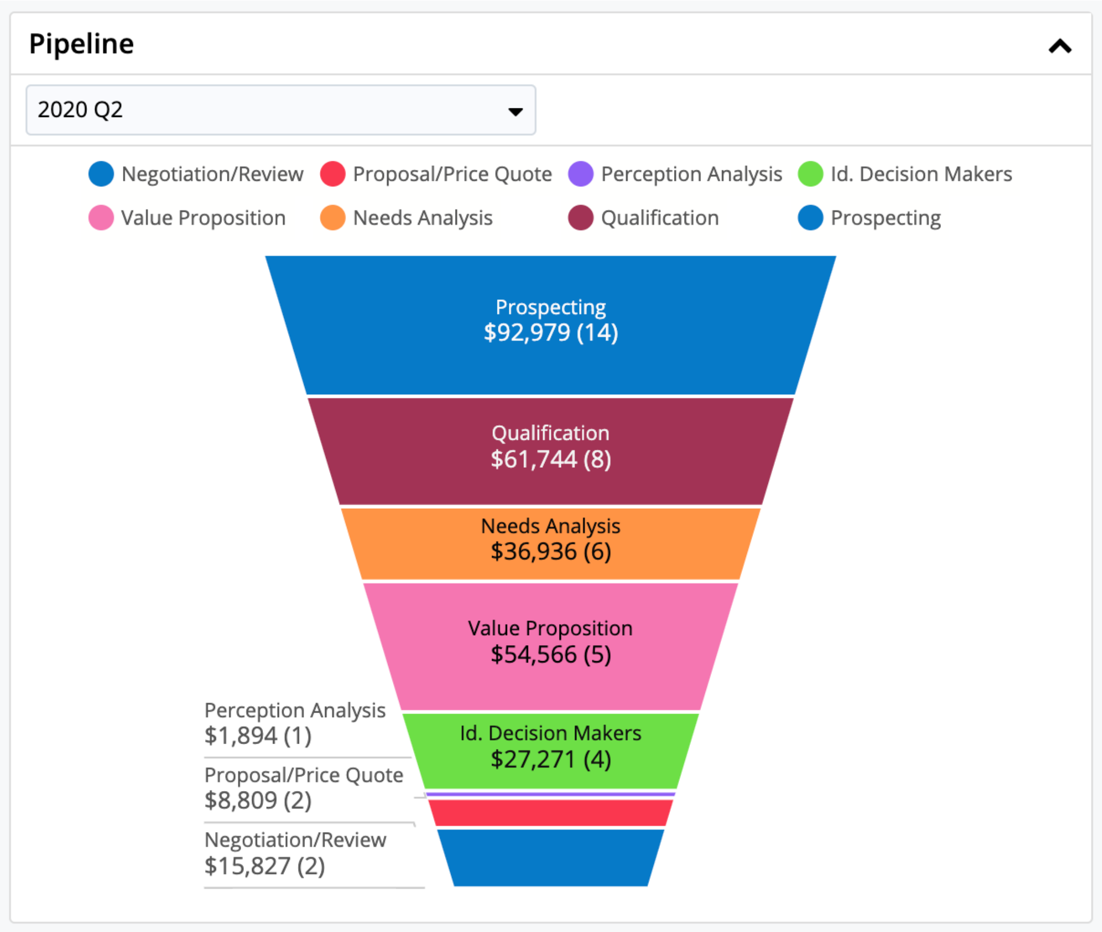
The Web Page dashlet allows users to load content from an external website in Sugar's dashboard. When adding this dashlet, you will need to enter the desired URL (e.g., https://example.com) in the URL field then select the display rows value to define the size of the dashlet. Please note that Sugar will only load content from trusted domains that the system administrator has approved in Admin > Content Security Policy Settings. If you get an error indicating that the content has not been approved, please reach out to your administrator as they will need to update your system's Content Security Policy settings. If the CSP settings get updated while you are logged in to Sugar, you will need to refresh your browser for the changes to take effect in your session.



Sales Pipeline Chart Dashlet

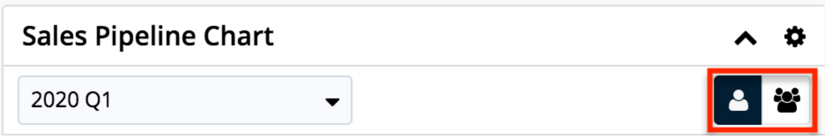
The Sales Pipeline Chart dashlet illustrates the flow of open sales opportunities through the various sales stages by displaying the total dollar amounts for open records grouped by sales stage. The top of the sales funnel is the widest point and represents sales deals that are still in the earliest stage of "Qualification". The funnel narrows as unqualified prospects fall away and opportunities with higher win potential approach final sale.

Note: The Sales Pipeline Chart dashlet is not available for Sugar Serve users. For more information on license types and the functionality available for each, refer to the User Management documentation.

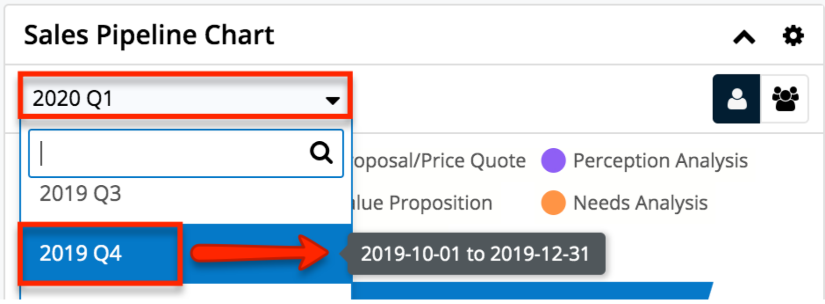


Note: The Sales Pipeline chart assumes that the sales stages are being used as defined in the out-of-the-box Sales Stage dropdown list. While the dashlet will display custom Sales Stage field values, the out-of-the-box Closed Won and Closed Lost field values must be preserved in order for Sugar's Sales Pipeline Chart to properly identify open vs. closed business. Any custom stages added to the Sales Stage dropdown by your organization will be displayed at the top of the funnel, regardless of how the stages are sorted within the dropdown.

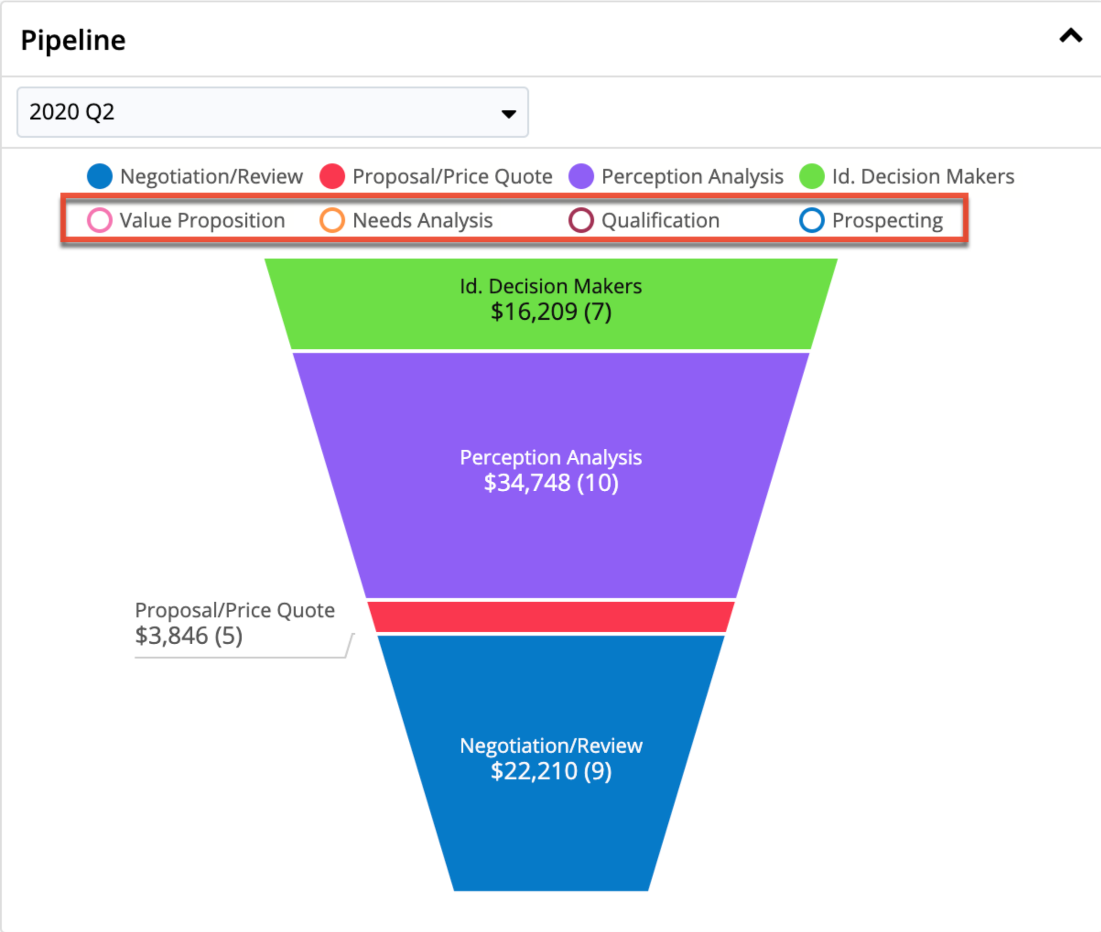
You can customize the Sales Pipeline Chart to monitor the overall health of your personal funnel or the aggregate funnel for you and all of the users that report to you. After adding this dashlet to the homepage, toggle between "My Pipeline" and "My Team's Pipeline" using the individual and group icons on the upper right of the dashlet. "My Pipeline" displays a summary of opportunities or revenue line items for the current user and "My Team's Pipeline" displays a summary of opportunities or revenue line items for the current user plus his direct reports as configured in the "Reports to" field of their user profile.



The pipeline can also be filtered by time periods that have been configured by the administrator in the Forecasts module by clicking on the time period dropdown. The chart will display only records with an expected close date within the specified date range. Hover over the time periods to see the dates that the time periods begin and end.



To further customize the dashlet, users can click on individual sales stage labels to add and remove those stages from the funnel view. In the example pictured below, only the Proposal/Price Quote and Negotiation/Review sales stages are enabled and therefore appear in the legend with solid dots. Sales stages that have been disabled will appear in the legend as empty circles.

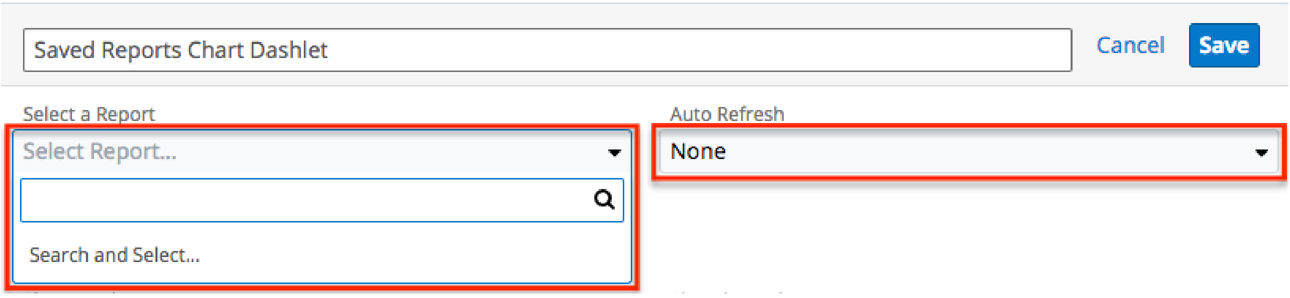


For more detailed information on forecasting, please refer to the Forecasts documentation.

Saved Reports Chart Dashlet

The Saved Reports Chart dashlet allows you to view pre-defined report charts as well as charts of your saved reports. When adding a Saved Reports Chart dashlet, you can select from the pre-defined report charts as well as any custom report charts to which you have access. Summation-type, summation with details-type, and matrix-type reports have the chart option available to view as dashlets.

When adding the reports chart dashlet, you will first select your desired report via the Select a Report option. You can either type the first few characters of the report's name and select from the type-ahead results or click "Search and Select..." below the search box to select your desired report from the Search and Select Reports drawer. Please note that only reports with charts will be available to add to the dashlet. The Auto Refresh option allows you to choose a time frame (e.g., Every 30 Minutes) that you wish to have the dashlet query automatically refreshed.

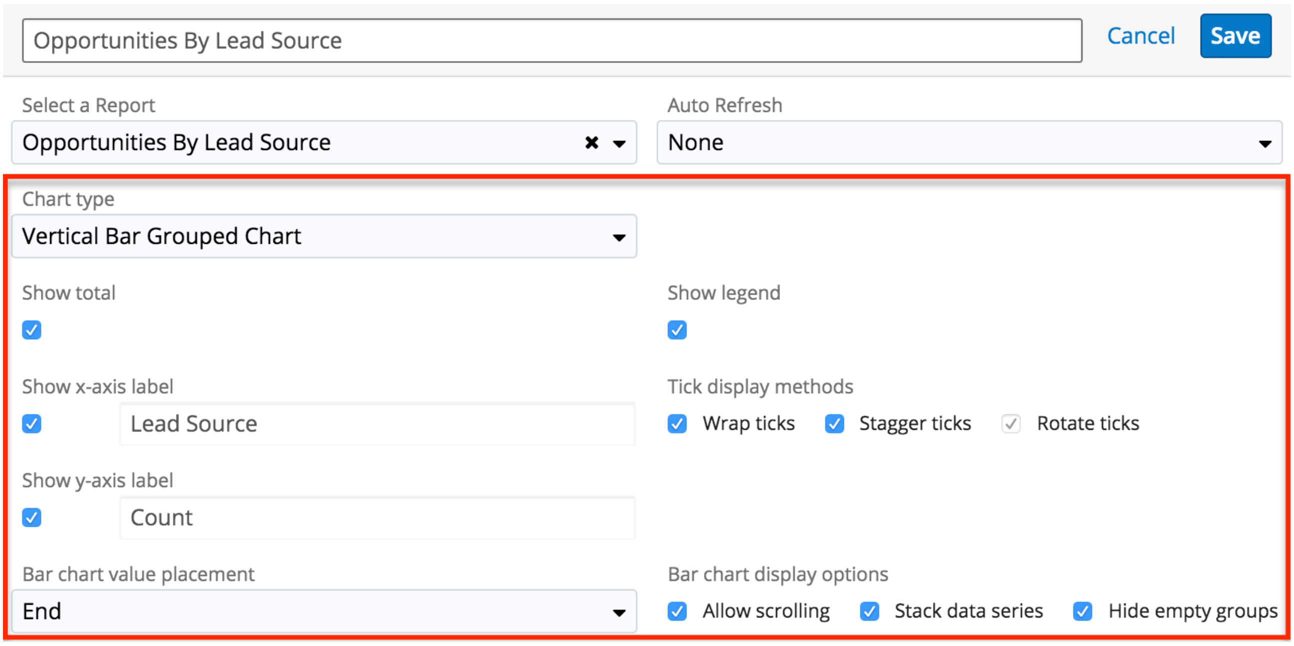


In addition, the following configuration options allow you to define how the chart will display:

Note: The configuration options available may vary slightly between the report chart types.

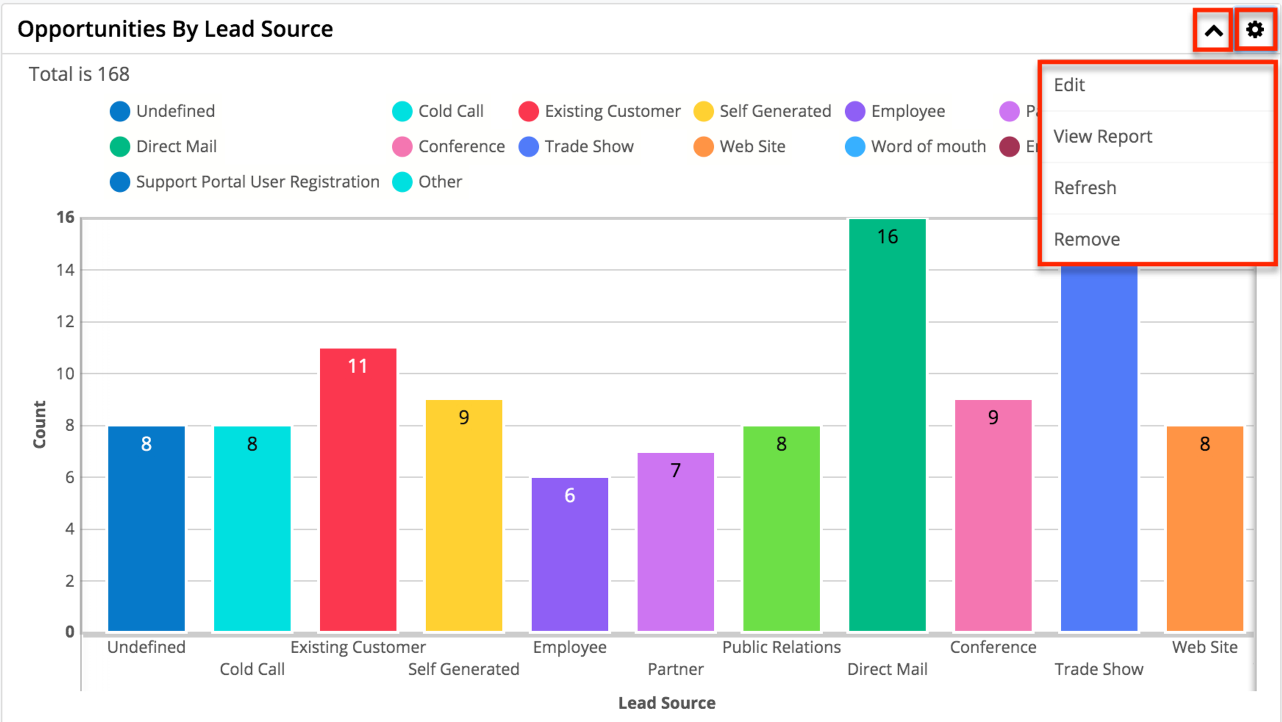
- **Chart type**: Select the type of chart (e.g., Pie Chart, Funnel Chart) to display.
  - The chart type initially defaults to the chart type defined in the originating report.
  - The available chart types will vary between reports.
  - For more information on chart types, please refer to the Reports documentation.
- **Show total**: Enable the checkbox to display the report's total value on the dashlet.
  - The total value in the report chart dashlet dynamically updates to display the total as reflected in the originating report.
- **Show legend**: Enable the checkbox to display the full chart's legend on the dashlet.
- **Show x-axis label**: Mark the checkbox to display the chart's x-axis title on the dashlet.
  - A title from the originating report will populate automatically, but you can specify a different title for display in the dashlet by entering a new value in the open text box.
  - This option only applies to bar charts and line charts.
- **Tick display methods**: Enable the appropriate options based on how you wish to display x-axis labels with long texts on the chart dashlet. When all three options are enabled, Sugar will apply the display methods in order ("Wrap ticks", "Stagger ticks", "Rotate ticks") and display the x-axis labels based on the best option.
  - **Wrap ticks**: Wraps x-axis labels to the next line.
  - **Stagger ticks**: Staggers x-axis labels in alternating positions.
  - **Rotate ticks**: Rotates x-axis labels diagonally instead of across.
  - This option only applies to vertical bar charts and line charts.
- **Show y-axis label**: Enable the checkbox to display the chart's y-axis title on the dashlet.

        - A title from the originating report will populate automatically, but you can specify a different title for display in the dashlet by entering a new value in the open text box.
        - This option only applies to bar charts and line charts.
- **Bar chart value placement**: Select where the chart values (e.g., End, Middle) will be positioned for bar-type charts.
    - The Top option applies to bar grouped-type charts (e.g., Horizontal Bar Grouped Chart) with an un-stacked data series.
- **Bar chart display options**: Enable the appropriate options based on how you wish to view data on the chart.
    - **Allow scrolling**: Scroll the chart up-and-down or left-to-right on the dashlet, if applicable. Disabling this option re-sizes the chart to fit the full dashlet width.
        - Scrolling will work for charts where the data exceeds the size of the dashlet width.
        - This option only applies to bar charts.
    - **Stack data series**: Displays a stacked bar for each grouping in the report chart broken into sub-sections of data. Disabling this option displays separate bars for each sub-section in the same grouping.
        - This option only applies to grouped bar charts (e.g., Vertical Bar Grouped Chart).
    - **Hide empty groups**: Hides any empty data groups from the chart, if applicable.
        - This option only applies to bar charts.



Once the dashlet is added, click the Gear icon on the upper right to edit, refresh, or remove the dashlet as necessary. In addition, you can select the View Report option to access the originating report's detail view which will open in a new browser tab. The report may also be edited to update or add information as necessary as long as your ability to edit reports in Sugar is not restricted by a role. For more information on teams and roles, please refer to the [Team Management] and [Role Management] documentation in the Administration Guide. If any changes are made to the report, the reports chart dashlet on your Home page will reflect the changes after saving the report and refreshing the dashlet.

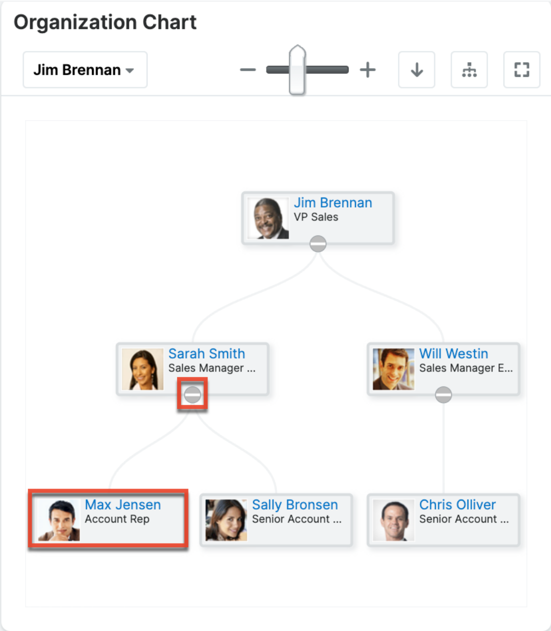
To collapse the dashlet, simply click the Up arrow to the left of the Gear icon. You can click the colored circles in the chart legend to toggle whether or not that segment appears in the chart. Users can also drill through to view a list of records associated with a particular chart section by clicking on the section. For more information about drilling through report charts, please refer to the [Reports] documentation.



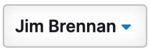
Note: Dashlet Gear menus, with the exception of the View Report and Refresh options in the Saved Reports Chart dashlet, are only available to the containing dashboard's Assigned To user and system admin users.

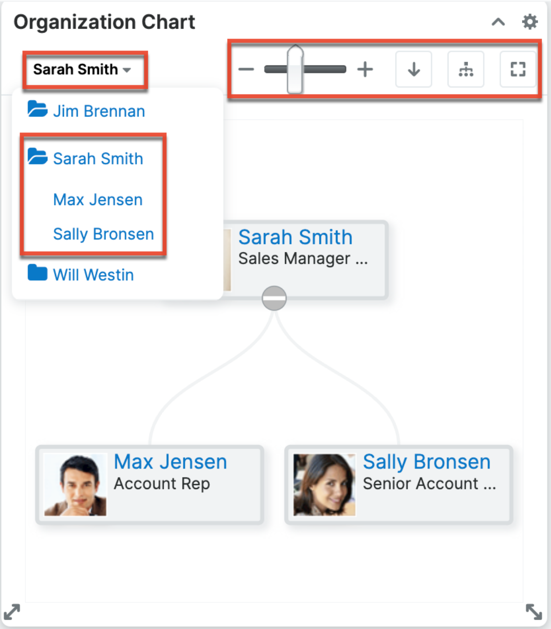
Organization Chart

The Organization Chart dashlet illustrates the reporting structure of your organization as determined by the [Reports To field] in the employee records. You will only see the users who report to you and the users who report to them (i.e., two levels of employees). Click on the tile of an employee to be taken to the employee record or the minus icon on the tile to collapse their reportees' tiles.



The icons along the top of the dashlet allow you to perform the following actions:

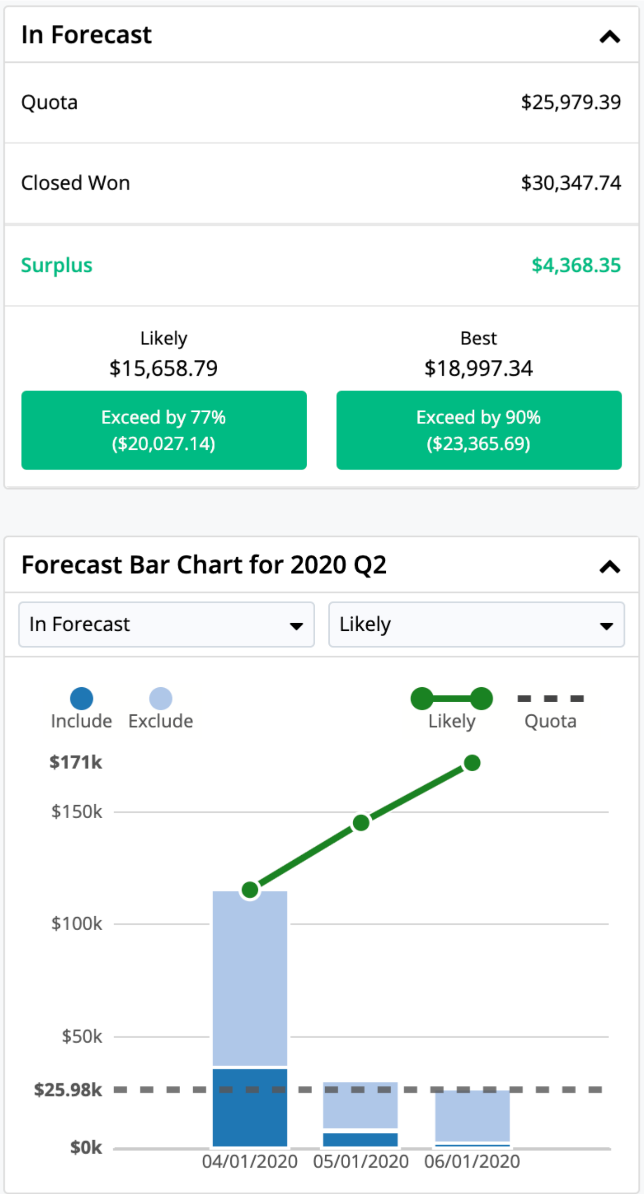
Option	Description
	Choose a user to focus the chart on. Names with a folder icon next to them have employees reporting to them; you can click their names to reveal the reportees' names.
	Zoom in and out on the chart.
	Change the orientation of the organization chart from top to bottom to left to right.
	Display all name tiles.
	Fit the organization chart to the dashlet size.



Module-Specific Dashlets

Certain modules (e.g., Forecasts) in Sugar contain dashlets that are built specifically for that module. For the Forecasts module, the intelligence pane displays dashlets that allow users to view key information regarding the various forecast stages, likely amounts, best amounts, etc. For more information regarding these forecast-specific dashlets, please refer to the Forecasts documentation.

The Gear icon also appears on the upper right of these dashlets to allow users to edit, refresh, and remove the dashlet's accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon and to open up the dashlet, simply click the arrow again.



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Renewals Console

Overview

Users with a Sugar Sell [license type](#) have access to Renewals Console, a Home page dashboard that provides a powerful work environment for your organization's

Sales agents and Customer Success Managers to automate and streamline renewal management. The Renewals Console makes it easy to manage accounts, quickly see the status of your current quarter's renewal pipeline, and manage individual renewal opportunities.

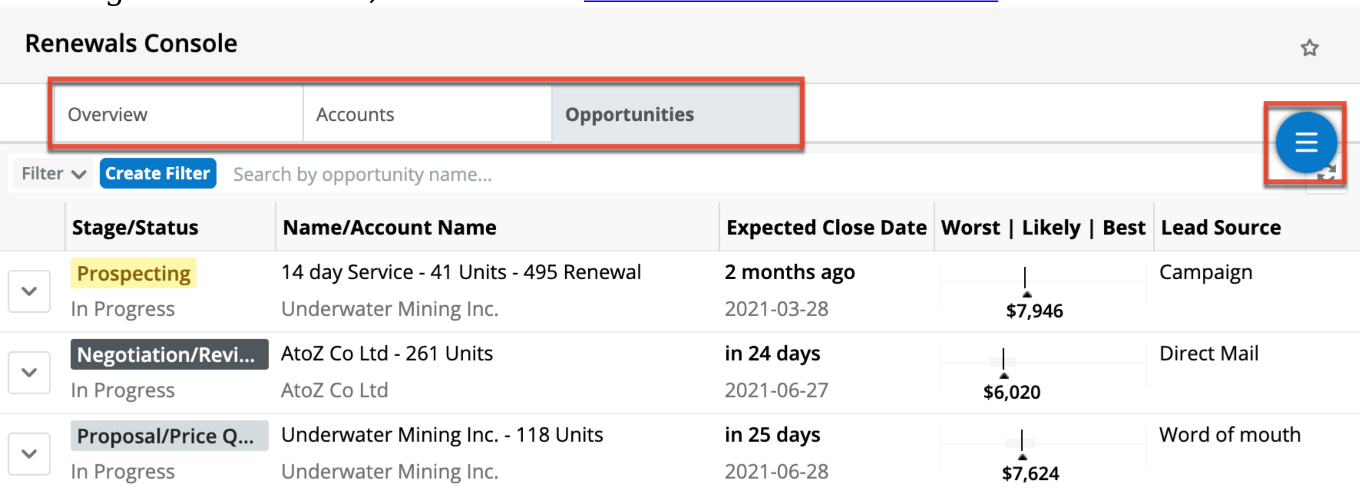
The Renewals Console is broken into three tabs:

The [Overview](#) tab comes pre-built with four dashlets that provide a quick look at your current sales pipeline, top revenue line items, and your open activities and tasks.

Next, the [Accounts](#) tab presents a list of the accounts assigned to the current user with potential renewal opportunities. Clicking on an account's row opens an [Account Detail drawer](#) that displays subscriptions, relationships, and recent comments and interactions with the account.

Finally, the [Opportunities](#) tab shows a visualization of your currently open opportunities and their relative [worst, likely, and best positions](#) compared with other opportunities in the list. Clicking on an opportunity's row will open the [Opportunity Detail drawer](#) with more complete details about the opportunity and its related records and interactions.

The floating actions button also appears on the console dashboard and allows users to perform actions such as create dashboards. For more information on floating actions button, refer to the [Dashboards and Dashlets](#) documentation.



Please note that admin Sell users and the Sell user assigned to the Renewals Console dashboard have the ability to configure the various parts of the console. For more information on how to configure the console, refer to the [Console Management](#) documentation.

Prerequisites

Sugar Sell Initialization

The Renewals Console only works with Sugar instances configured to use the Opportunities and Revenue Line Items model. It relies on the use of renewable services in the Product Catalog and Revenue Line Items modules. An administrator must configure the products in your product catalog as renewable services or you must designate the appropriate revenue line items as renewable services at the line-item level. For more information, refer to the Services and Renewable Revenue Line Items section of the Opportunities documentation.

Note: To be identified as "renewable" by Sugar Sell's pipeline automation engine, the user who closes an opportunity with renewable line items must be a Sugar Sell user or the pipeline automation will not initiate.

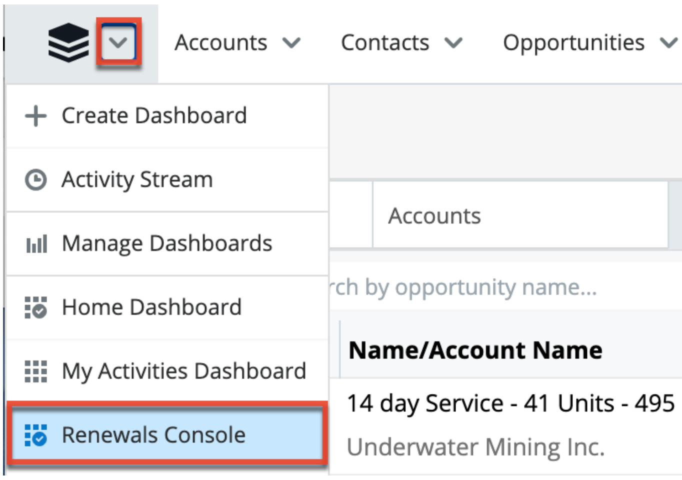
Access and Permissions

Although the Renewals Console shares some behaviors with standard shared dashboards, it is also specialized and, therefore, has some key differences:

- **Visibility**: Renewals Console follows the visibility and availability rules of other shared dashboards with the additional requirement that users must have a Sugar Sell license type. By default, the Renewals Console dashboard is shared with the Global team and set as a default dashboard, meaning it will appear in the home dashboards list for all users who are members of the Global team and have a Sugar Sell license type. An admin user may need to alter its Team field to push the Renewals Console to additional users.
- **Editability**: The dashlets on Renewals Console can only be modified, configured, or rearranged by an administrator user with a Sell license type. For more information, refer to the Console Management documentation.
- **Duplication**: Renewals Console cannot be duplicated.
- **Deletion**: Renewals Console cannot be deleted.

By default, the Renewals Console is a shared, default Home page dashboard and can be accessed by clicking the Cube icon's down arrow and selecting "Renewals

Console" from the menu.

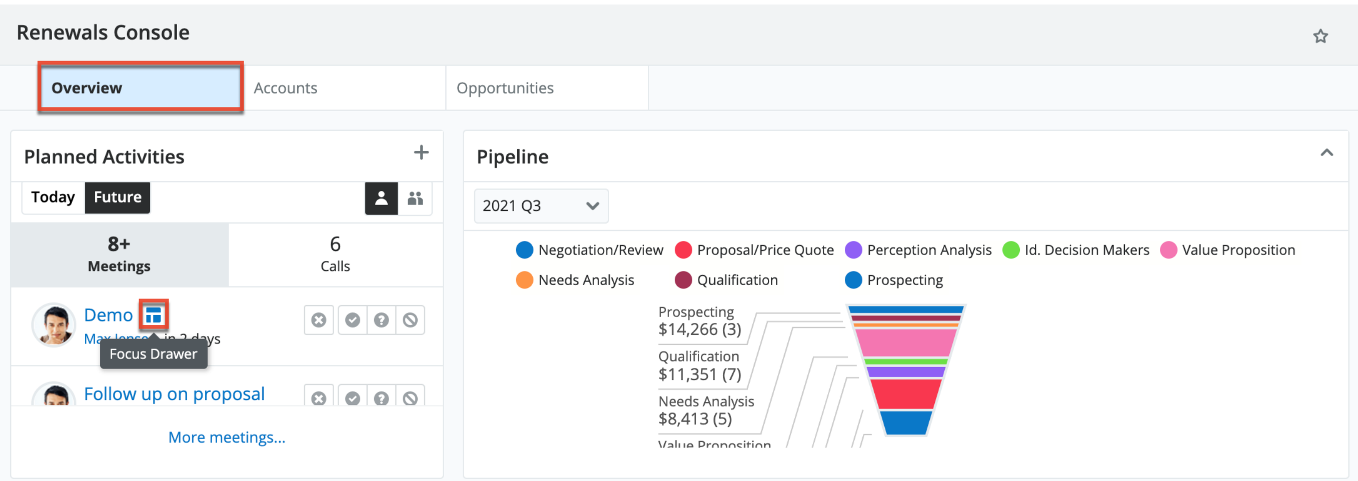


Overview Tab

By default, the Renewals Console's overview tab contains four dashlets. Admin Sell users can configure this tab's contents to add, remove, or modify its dashlets as explained in the [Console Management](#) documentation.

The following dashlets appear by default:

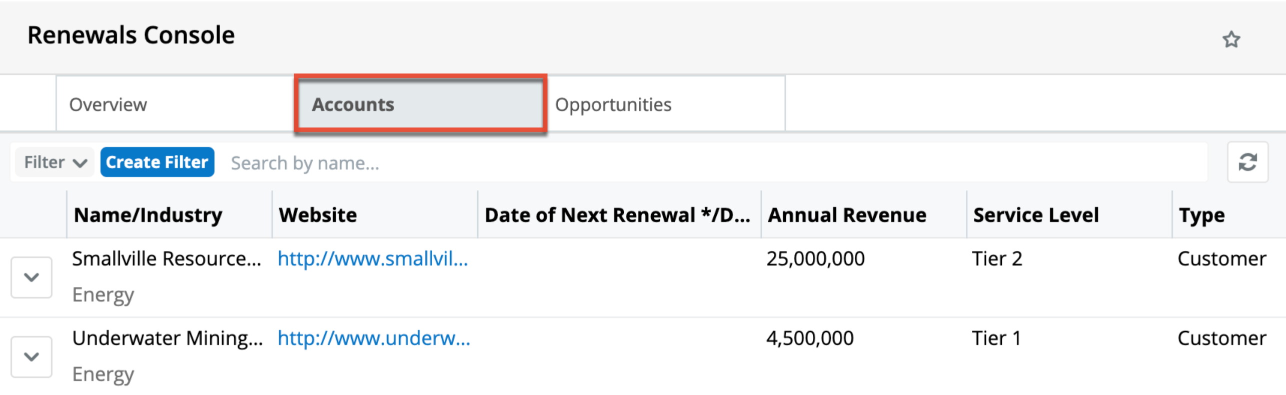
- Planned Activities
- Active Tasks
- Pipeline
- Top 10 Sales Revenue Line Items



Hovering over links in certain dashlets (e.g., Planned Activities dashlet) under the Overview tab will display a Focus icon to the right of the link (e.g., Demo), which can be clicked to reveal a Focus drawer. The Focus drawer dashboard displays a 360-degree view of the linked record through a set of dashlets containing relevant information such as the record's related records. For more information on focus drawers, refer to the User Interface documentation.

Accounts Tab

By default, the Renewals Console's Accounts tab displays the accounts assigned to the current user and sorted by the date of the next renewal unless the administrator has re-configured these options for the view. Each account in the list can be clicked to reveal an Account Detail drawer with additional information about its subscriptions and related records and activities. The features and functionality for the components in the Accounts tab are described in the following sections.



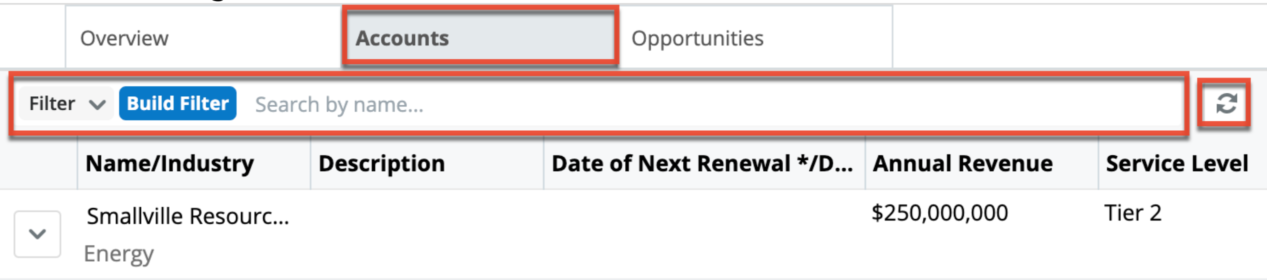
Note: Admin Sell users and the Sell user assigned to the Renewals Console dashboard have the ability to set a default sort order, apply a filter to the list view, as well as choose which fields to display as columns in the list view and designate the order in which they appear. For more information, refer to the Console Management documentation.

Console Search

Below the Acounts tab, a search bar displays which allows users to easily search by the account's name and pull up matching records in the list view. The search bar also includes a Filter option allowing you to narrow your search further using one of the default filter options.

Please note that admin Sell users and the Sell user assigned to the Renewals Console dashboard have the ability to define a filter for the list view, but you can apply additional filters or create new filters via the Build Filter option of the search bar to narrow the list view results further. For more information on how to apply and create filters, refer to the User Interface documentation.

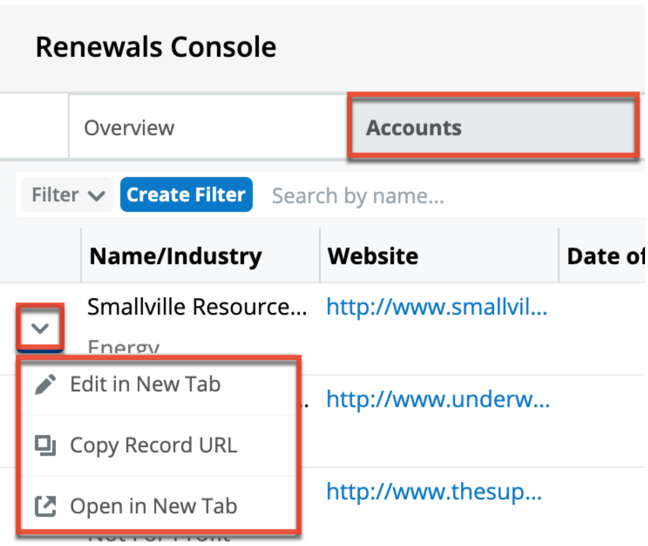
To update the filtered list view with the most recent results, click on the Refresh icon to the right of the search box.



Account Row Actions

To the left of each account's name is an Actions menu that provides quick access to view, edit, or share the account record for that row. Click the down arrow to access the following options:

- **Edit in New Tab**: Opens a new browser tab with the account's record view in edit mode
- **Copy Record URL**: Copies the URL of the account to your clipboard for easy sharing
- **Open in New Tab**: Opens a new browser tab with the account's record view



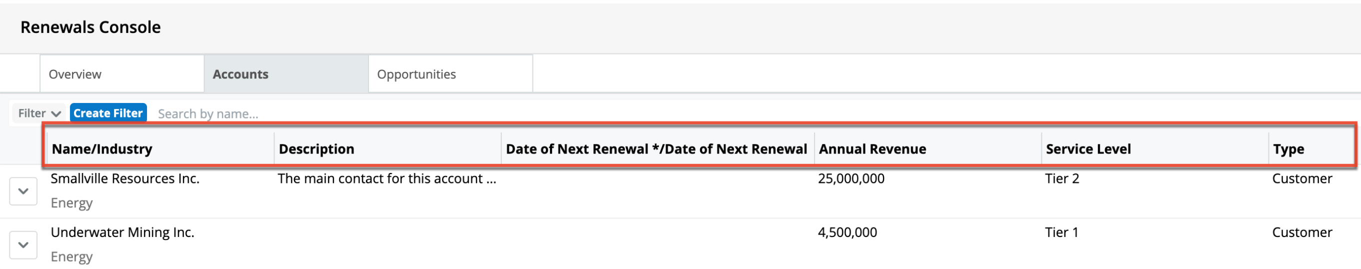
Account Information

Each account row displays select account details and you can click on an account's row to view even more information in the [Account Detail drawer](). Fields with an asterisk to the right of the field name (e.g. Date of Next Renewal *) are widget-type fields that provide data from one or more fields in the module in a different manner.

By default, the following information is displayed in the list view for each account in the Renewals Console:

Note: Sell admins and the Sell user assigned to the Renewals Console dashboard can configure the Accounts tab lists to choose which fields to display as columns in the list view as well as the order in which they appear.

- **Name/Industry**: The name of the account stacked above the account's industry.
- **Description**: The account's Description field value.
- **Date of Next Renewal */Date of Next Renewal**: The amount of time until or since the date of next renewal stacked above the expected close date for the next service that is up for renewal on opportunities related to the account.
- **Annual Revenue**: The account's Annual Revenue field value.
- **Service Level**: The account's contractual level of service.
- **Type**: The account's Account Type field value.



For more information on account fields, please refer to the Accounts documentation.

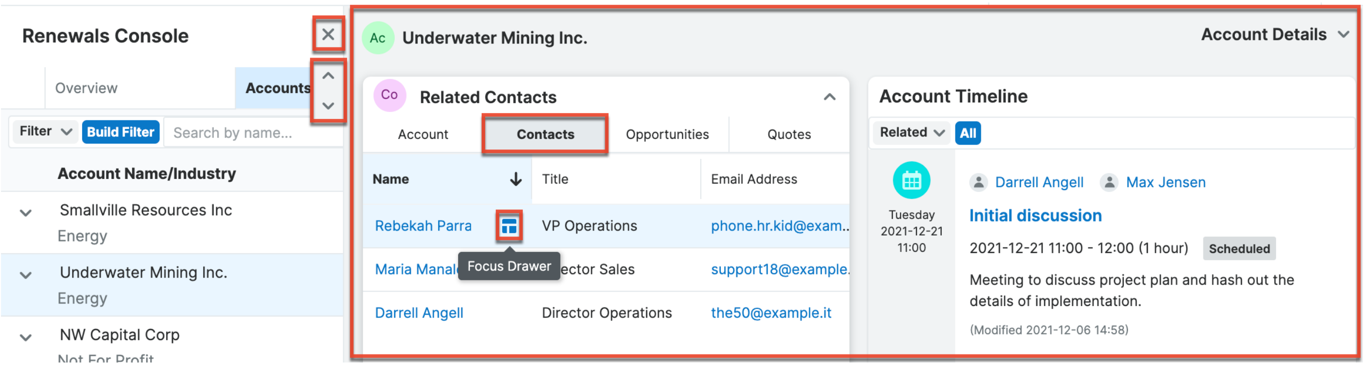
Note: While the counts within the Accounts tab will tally all accounts related to the current user, the Renewals Console can display a maximum of 100 rows.

Account Detail Drawer

Clicking an account's row in the Renewals Console opens a drawer that aggregates information about the account, its related records, past interactions, and active subscriptions. The drawer contains four dashlets, the Account Record Dashlet, Comment Log Dashlet, Active Subscriptions Dashlet, and Account Timeline Dashlet, which are described in the following sections below.

You can view key details related to the next or previous account record in the list view by clicking the up or down arrow to the left of the drawer. To close the drawer, click the X icon at the top left of the drawer or press your Escape (esc) key. While the prioritized list view is refreshed automatically every five minutes, the Account Detail drawer does not. Switch between accounts or close and reopen the drawer to see the latest information.

Hovering over links in certain dashlets on the drawer will display a Focus icon to the right of the link, which can be clicked to reveal a focus drawer. The Focus drawer dashboard displays a 360-degree view of the linked record through a set of dashlets containing relevant information such as the record's related records, related activities, and active subscriptions. For more information on focus drawers, refer to the User Interface documentation.



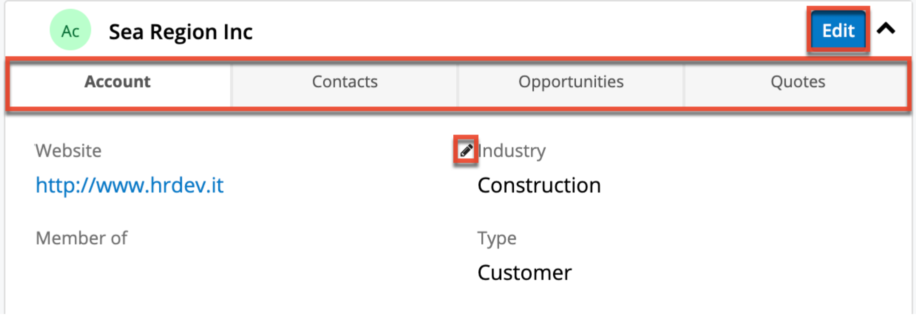
Note: An admin user with a Sugar Sell license type and the user assigned to the Account Details dashboard may edit the layout and configuration of dashlets in the Account Detail drawer for all users. For more information, refer to the Console Management documentation.

Account Record Dashlet

The primary dashlet in the Accounts tab is a Record View dashlet, which appears in the first quadrant of the Account Detail drawer by default. It is configured to display the account you are currently viewing as well as additional tabs containing related records. The dashlet is a concise alternative to the account's full record view, as it displays not only the account's fields but also the account's most important subpanel contents via additional tabs. The account record can be edited directly in the dashlet by clicking an individual field or clicking the Edit button.

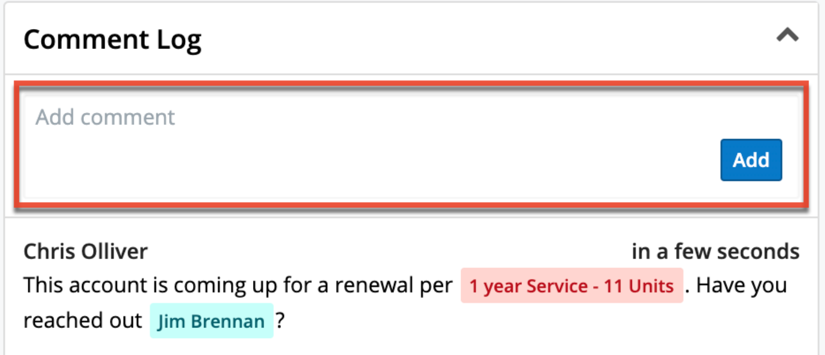
Once you are done editing, click the Save button to preserve your changes. Additionally, an Actions menu is available in the Account Record View dashlet allowing you to escalate the account. For more information, refer to the Escalations documentation.

If you wish to access the account's full-page record view, simply hover over the account's name in the dashlet and click the arrow icon that appears to navigate to the record. The related record tabs in the dashlet display lists of records with a relationship to the current account record. For more information on record view dashlets, refer to the Dashboards and Dashlets documentation.



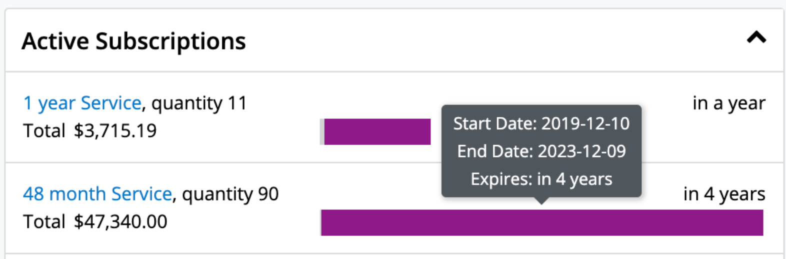
Comment Log Dashlet

The Account Detail drawer also contains a Comment Log dashlet. This dashlet displays entries from the account's Comment Log field with the most recent entry on top. You can quickly create new entries by typing in the open text box and then clicking "Add". For more information about comment logs including mentioning records and users, refer to the User Interface documentation.



Active Subscriptions Dashlet

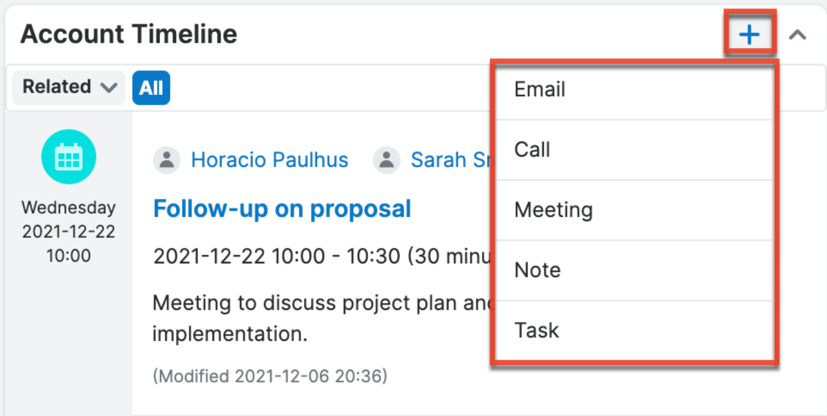
The Active Subscriptions dashlet shows a list of all of the current account's purchases that are marked "Service", have a start date in the past, and an end date in the future. The dashlet shows each purchase's name, quantity of units, and purchased line item calculated revenue amount next to "Total". A simple bar chart visualizes the time elapsed and time remaining for the subscription, which you can explicitly view by hovering your mouse over the bar.



Account Timeline Dashlet

The Account Timeline dashlet displays the account's related emails, calls, meetings, notes, and tasks activities and select field updates (e.g., Assigned To) in the form of record cards. Each card in the dashlet displays key information (e.g., subject, description, guest's name) for the related record and the cards are sorted in chronological order based on the date they occur or are due (for tasks), with the most recent at the top.

When previewing emails, any email attachments can be downloaded by clicking the attachment's name. You can also quickly create new activities by clicking the Plus icon in the dashlet header and selecting the type of record you wish to create. Doing so will open a quick-create drawer and automatically select the current account in the new record's Related To field. For more information on Timeline dashlet, refer to the Dashboards and Dashlets documentation.



Purchase History Dashlet

While not available by default, it is worth mentioning that the Purchase History dashlet can be added to both the Account Detail Drawer and the Opportunity Detail Drawer by an administrator or the user assigned to the Renewals Console dashboard. The dashlet shows a list of all the current account's purchases regardless of the start or end date of the purchase record. The dashlet shows each purchase's name, date range, quantity, and total. For more information, refer to the Purchase History Dashlet section of the Dashboards and Dashlets documentation.

Opportunities Tab

By default, the Renewals Console's Opportunities tab displays the open opportunities that are assigned to the current user and sorted by the expected close date with overdue opportunities shown in the topmost positions, unless the administrator has re-configured these options for the view. Each opportunity in the list can be clicked to reveal an Opportunity Detail drawer with additional information about its related records and activities. The features and functionality for the components in the Opportunities tab are described in the following sections.

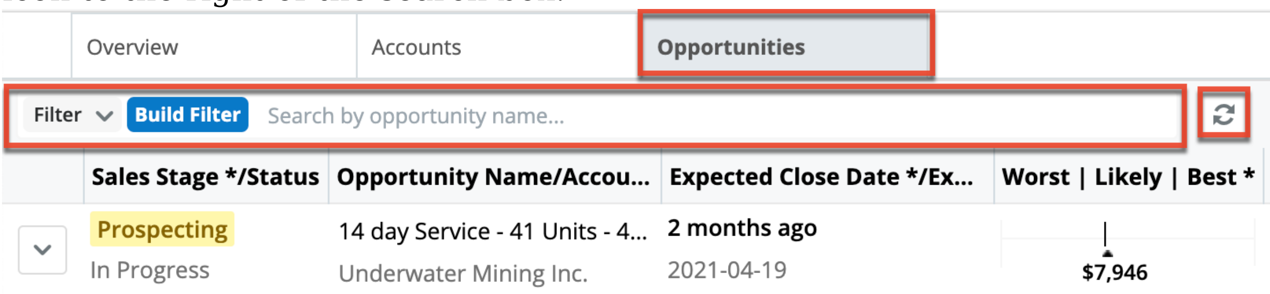
Note: Sell admins and the Sell user assigned to the Renewals Console dashboard have the ability to set a default sort order, apply a filter to the list view, as well as choose which fields to display as columns in the list view, and designate the order in which they appear. For more information, refer to the Console Management documentation.

Console Search

Below the Opportunities tab, a search bar displays which allows users to easily search by the opportunity's name and pull up matching records in the list view. The search bar also includes a Filter option allowing you to narrow your search further using one of the default filter options.

Please note that admin Sell users and the Sell user assigned to the Renewals Console dashboard have the ability to define a filter for the list view, but you can apply additional filters or create new filters via the Build Filter option of the search bar to narrow the list view results further. For more information on how to apply and create filters, refer to the User Interface documentation.

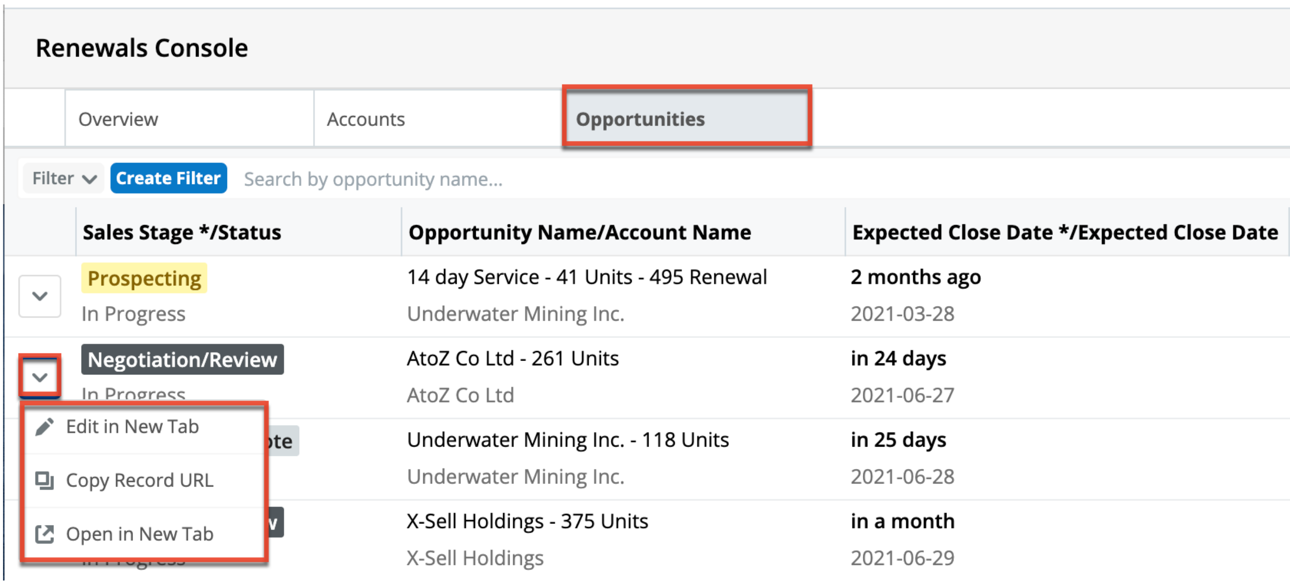
To update the filtered list view with the most recent results, click on the Refresh icon to the right of the search box.



Opportunity Row Actions

To the left of each opportunity's name is an Actions menu that provides quick access to view, edit, or share the opportunity record for that row. Click the down arrow to access the following options:

- **Edit in New Tab**: Opens a new browser tab with the opportunity's record view in edit mode
- **Copy Record URL**: Copies the URL of the opportunity record to your clipboard for easy sharing
- **Open in New Tab**: Opens a new browser tab with the opportunity's record view



Opportunity Information

Each opportunity row displays select opportunity details and you can click on a row to view even more information in the Opportunity Detail drawer. Fields with an asterisk to the right of the field name (e.g., Expected Close Date *) are widget-type fields that provide data from one or more fields in the module in a different manner.

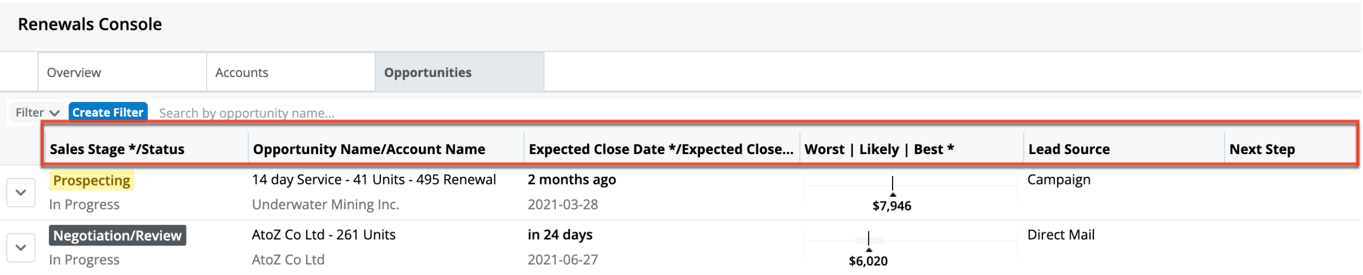
By default, the following information is displayed in the list view for each opportunity in the Renewals Console:

Note: Sell admins and the Sell user assigned to the Renewals Console dashboard can configure the Opportunities tab lists to choose which fields to display as columns in the list view as well as the order in which they appear.

- **Sales Stage */Status**: "Sales Stage" shows the latest sales stage of all of the open revenue line items related to the opportunity. The stage is stacked over the opportunity's status.
- **Opportunity Name/Account Name**: The name of the opportunity stacked over the name of the opportunity's account.
- **Expected Close Date */Expected Close Date**: The amount of time until or since the latest expected close date stacked above the latest expected

close date for all of the opportunity's related line items.

- **Worst | Likely | Best ***: A visual representation of the worst, likely, and best values for the opportunity in context with the rest of your pipeline. For more information, refer to the Worst | Likely | Best Column section of this page.
- **Lead Source**: The opportunity's Lead Source field value.
- **Next Step**: The opportunity's Next Step field value.



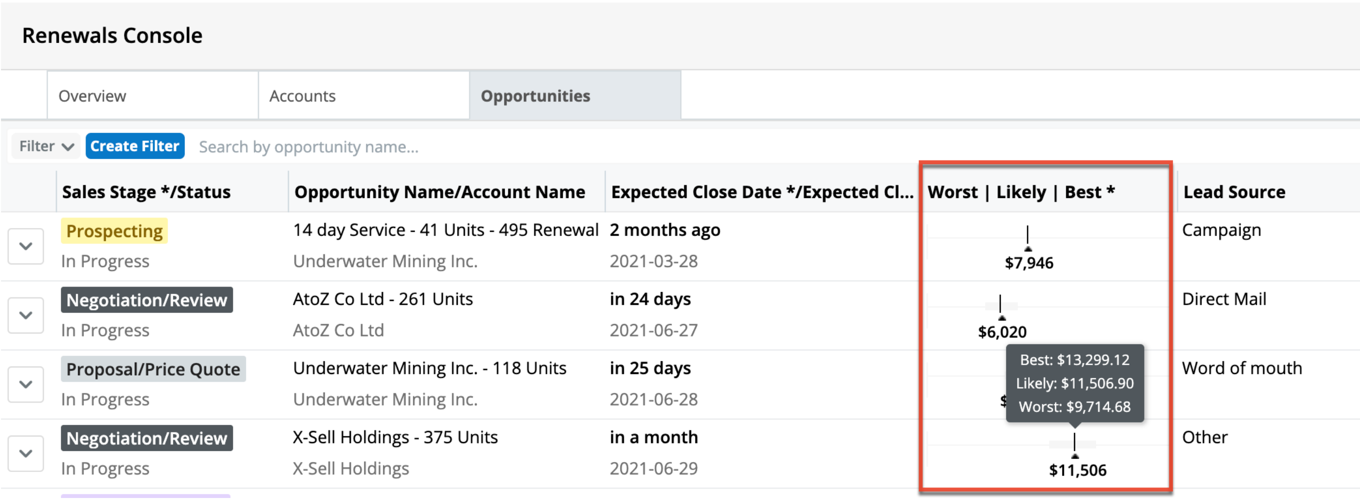
For more information on opportunity fields, please refer to the Opportunities documentation. For more information on revenue line item fields, please refer to the Revenue Line Items documentation.

Note: While the counts within the Opportunities tab will tally all filtered opportunities related to the current user, the Renewals Console can display a maximum of 100 rows.

Worst | Likely | Best Column

A column within the Opportunities tab labeled "Worst | Likely | Best *" presents a visual representation of your opportunities' values relative to each other. The leftmost hash mark represents the relative position of the lowest "Worst" value for all of the opportunities returned in the Renewals Console list view. The rightmost hash mark is the relative position of the highest "Best" value for all of the opportunities.

The thick, gray horizontal bar between the hash marks represents the worst-to-best values within the overall range for the current opportunity, with a black hash mark to indicate the relative position of the likely value for the current opportunity. This visualization allows you to evaluate the potential value of the opportunity relative to the rest of your pipeline. To explicitly view the Best, Likely, and Worst values for an opportunity, simply hover your mouse over the gray bar.

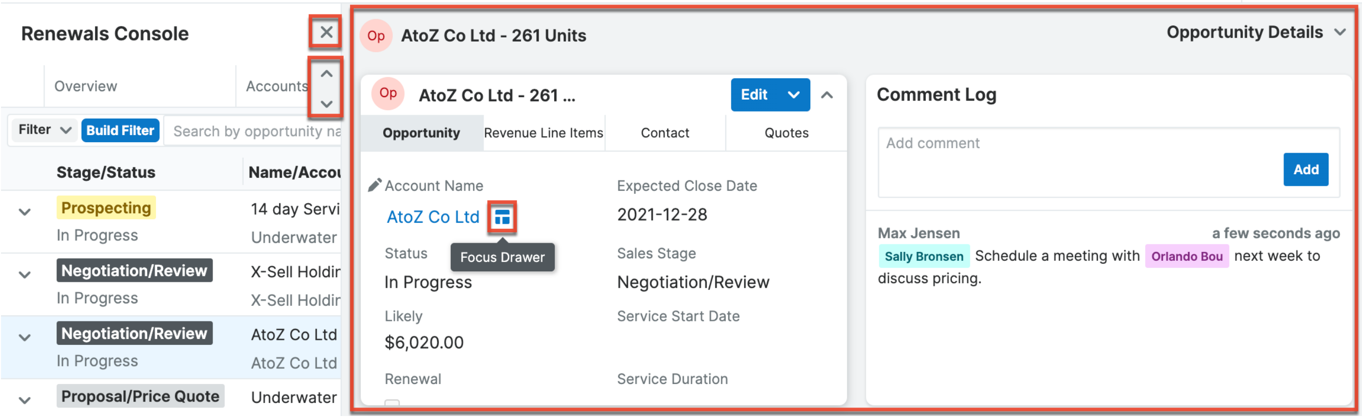


Opportunity Detail Drawer

Clicking an opportunity's row in the Renewals Console opens a drawer that aggregates information about the opportunity, its related records, and past interactions. The drawer contains four dashlets, the Opportunity Record Dashlet, Related Account Record Dashlet, Comment Log Dashlet, and Opportunity Timeline Dashlet, which are described in the following sections below.

You can view key details related to the next or previous opportunity record in the list view by clicking the up or down arrow to the left of the drawer. To close the drawer, click the X icon at the top left of the drawer or press your Escape (esc) key. While the prioritized list view is refreshed automatically every five minutes, the Opportunity Detail drawer does not. Switch between opportunities or close and reopen the drawer to see the latest information.

Hovering over links in certain dashlets (e.g., Opportunity Record dashlet) on the drawer will display a Focus icon to the right of the link (e.g., Sunnyvale Reporting Ltd), which can be clicked to reveal a focus drawer. The Focus Drawer dashboard displays a 360-degree view of the linked record through a set of dashlets containing relevant information such as the record's related records, past interactions, purchase history, and active subscriptions. For more information on focus drawers, refer to the User Interface documentation.



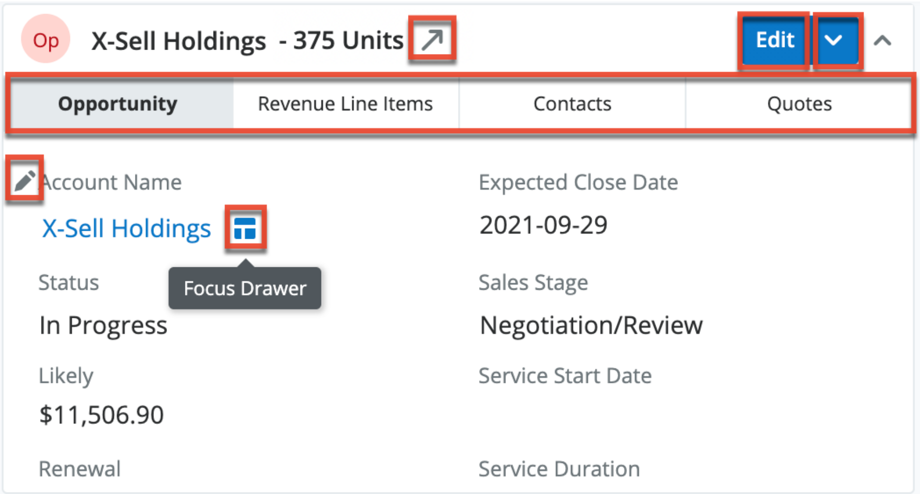
Note: An admin user with a Sugar Sell license type and the user assigned to the Opportunity Details dashboard may edit the layout and configuration of dashlets in the Opportunity Detail drawer for all users. For more information, refer to the Console Management documentation.

Opportunity Record Dashlet

The primary dashlet in the Opportunities tab is a Record View dashlet, which appears in the first quadrant of the Opportunity Detail drawer by default. It is configured to display the opportunity you are currently viewing as well as additional tabs containing related records. The dashlet is a concise alternative to the opportunity's full record view, as it displays not only the opportunity's fields but also the opportunity's most important subpanel contents via additional tabs.

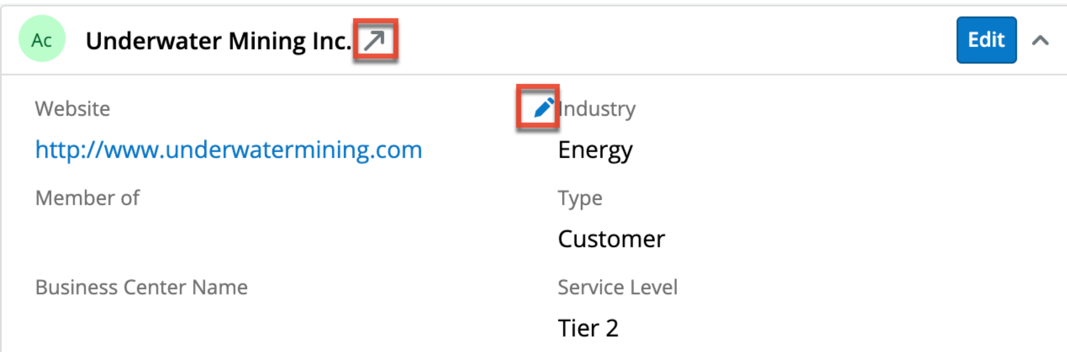
The opportunity record can be edited directly in the dashlet by clicking an individual field or clicking the Edit button. Once you are done editing, click the Save button to preserve your changes. Hovering over certain links such as the Account Name will display a Focus icon which can be clicked to open the Focus drawer.

Additionally, an Actions menu is available in the Opportunity Record View dashlet allowing you to escalate the opportunity. For more information, refer to the Escalations documentation. If you wish to access the opportunity's full-page record view, simply hover over the opportunity's name in the dashlet and click the arrow icon that appears to navigate to the record. The related record tabs in the dashlet display lists of records with a relationship to the current opportunity record. For more information on record view dashlets, refer to the Dashboards and Dashlets documentation.



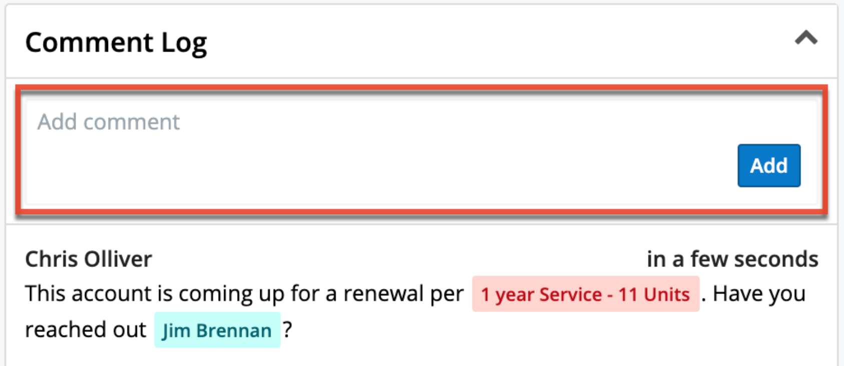
Related Account Record Dashlet

Another, Record View dashlet, the Related Account Record dashlet, is available in the Opportunity Detail drawer. This dashlet displays the account related to the current opportunity, providing valuable service level and business center information as well as the ability to edit the related account without having to navigate away from the Renewals Console. If you wish to access the account's full-page record view, simply hover over the account's name in the dashlet and click the arrow icon that appears to navigate to the record. For more information on record view dashlets, refer to the Dashboards and Dashlets documentation.



Comment Log Dashlet

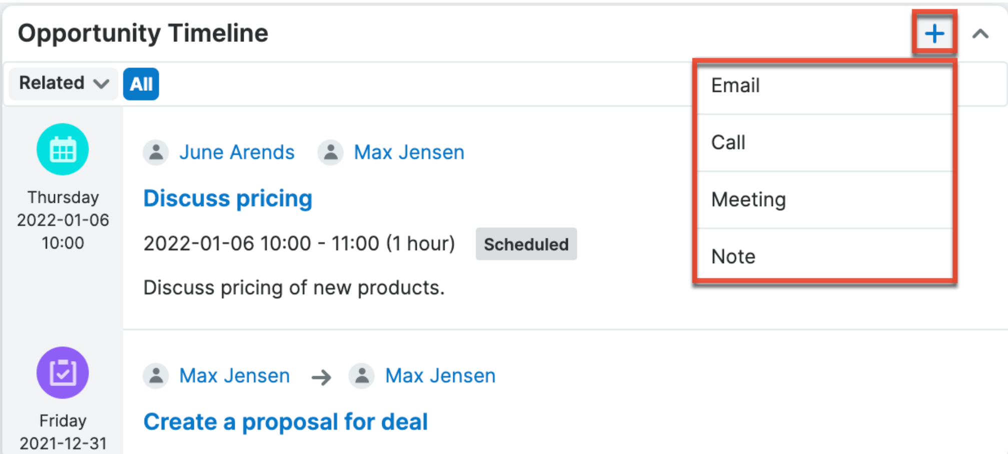
The Opportunity Detail drawer also contains a Comment Log dashlet. This dashlet displays entries from the opportunity's Comment Log field with the most recent entry on top. You can quickly create new entries by typing in the open text box and then clicking "Add". For more information about comment logs including mentioning records and users, refer to the User Interface documentation.



Opportunity Timeline Dashlet

The Opportunity Timeline dashlet displays the opportunity's related emails, calls, meetings, notes, and tasks and select field updates (e.g., Assigned To) in the form of record cards. Each card in the dashlet displays key information (e.g., subject, description, guest's name) for the related record and the cards are sorted in chronological order based on the date they occur or are due (for tasks), with the most recent at the top.

When previewing emails, any email attachments can be downloaded by clicking the attachment's name. You can also quickly create new interactions by clicking the Plus icon in the dashlet header and selecting the type of record you wish to create. Doing so will open a quick-create drawer and automatically select the current opportunity in the new record's Related To field. For more information on Timeline dashlet, refer to the [Dashboards and Dashlets](#) documentation.



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Home

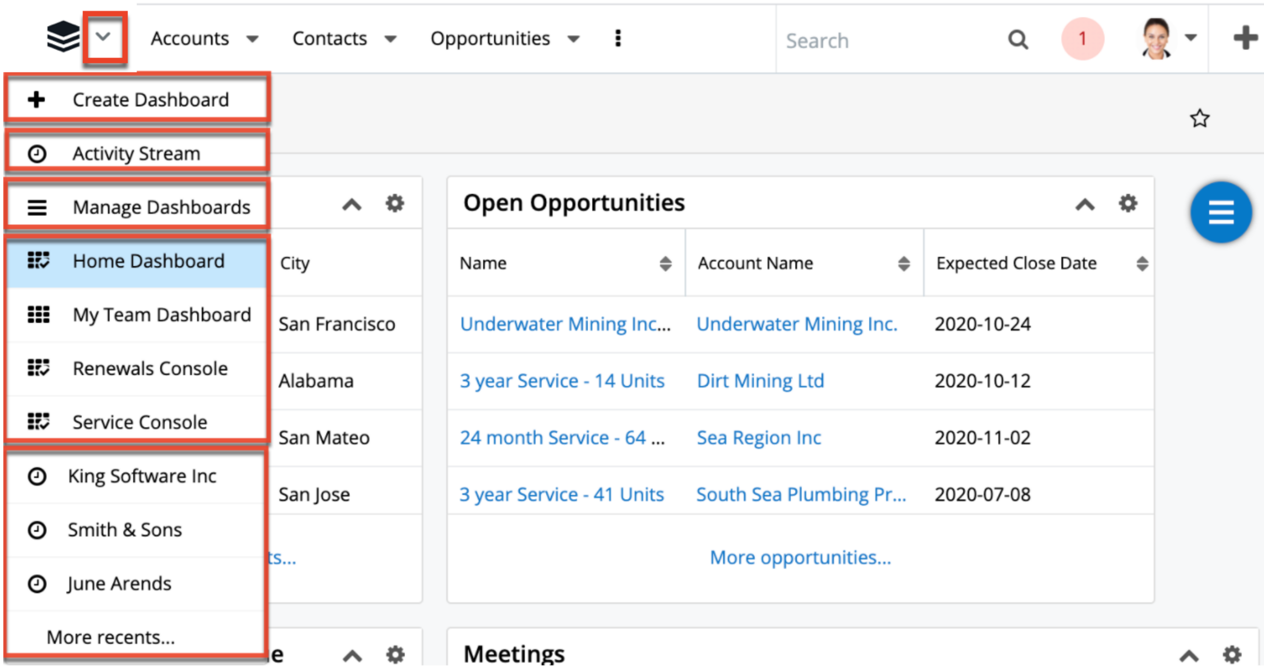
Overview

Sugar's Home page houses the dashboard and activity stream which allows users to view pertinent record information via various dashlets and activity stream posts. Every user in Sugar can configure their dashlets based on the display options and filters available from their dashboard. Users can also personalize their activity stream to only view posts specific to records that are important to them. 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 Module Tab

The Home module tab, represented by the Cube icon, is the first tab on the Sugar navigation bar. Click the Cube icon to navigate to the Home page or click the triangle next to the cube to perform additional actions. The following options are available in the Home module tab's actions menu:

- **Create Dashboard**: Create a new dashboard and build out its layout and dashlet set. Refer to the Dashboards and Dashlets documentation for more information.
- **Activity Stream**: View your activity stream for all enabled modules. Refer to the Activity Stream section for more information.
- **Manage Dashboards**: Access the Dashboards module to share dashboards, pull dashboards to your Home page, etc. Refer to the Dashboards and Dashlets documentation for more information.
- **Dashboards List**: Choose one of the available Home page dashboards to view. Admin-designated default dashboards, shared dashboards you have pulled to your Home page view, and personal dashboards you have created will be displayed. For more information, refer to the Dashboards and Dashlets documentation.
  Note: Up to 50 dashboards can be displayed in the Home module tab's menu.
- **Recent Records**: The three records you most recently viewed, from across all Sugar modules, are displayed at the bottom of the menu. Click a record name to navigate to its record view. Clicking "More recents..." will display a fourth record.



Dashboards

Sugar's Home page allows you to build full-page dashboards by combining dashlets and configuring the dashboard layout to suit your business needs.

Dashboards and dashlets are thoroughly documented in the Dashboards and Dashlets documentation, which covers dashboards both on the Home page and dashboards on list view and record view intelligence panes.

Sugar Sell users have access to a special Home dashboard called Renewals Console. For more information on license types and the functionality available for each type, refer to the User Management documentation.

Dashlets

Dashlets reside within the dashboard and provide users with valuable information about their records in Sugar. By default, there are stock dashlets that come out-of-the-box with Sugar and users can easily add them to various dashboards per their viewing preference. Please note that each dashlet can be configured to display the necessary information you wish to view. For more information on configuring the dashlet, please refer to the Editing Dashlets section of the Dashboards and Dashlets documentation.

Commonly Used Dashlets

By default, the "My Dashboard" will display on your Home page and include stock dashlets such as "My Contacts", "Pipeline", etc. Users have the option to add various types of dashlets to each dashboard to view information that is of importance to them. For more information on adding dashlets, please refer to the Adding Dashlets section of the Dashboards and Dashlets documentation.

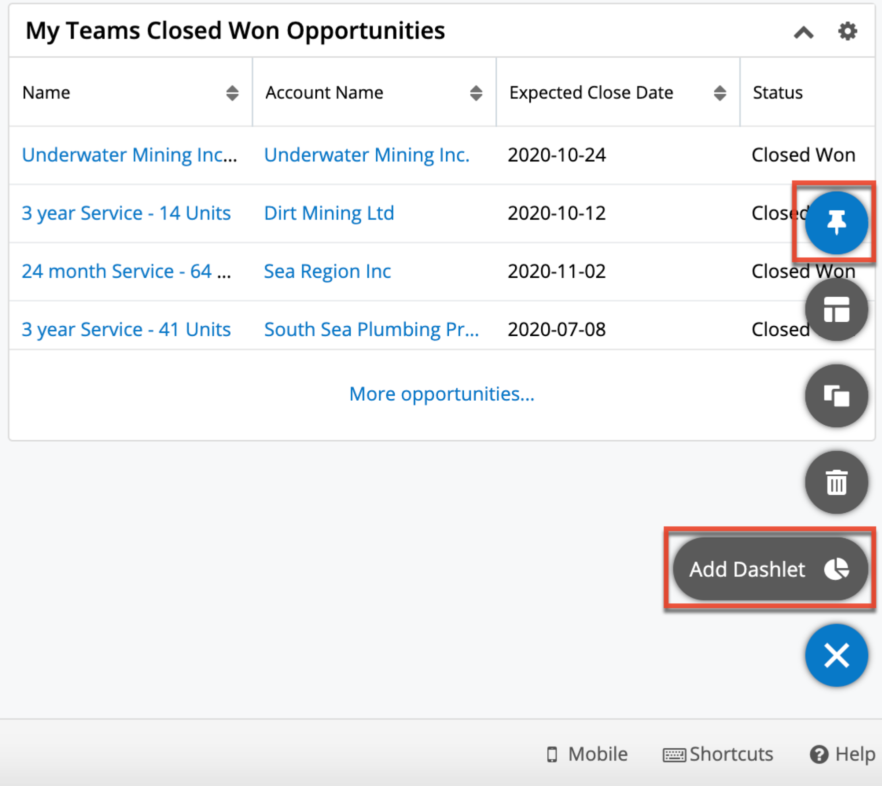
The following are some commonly-used dashlets that are available to use on your Home page:

Dashlet	Description
List View Dashlet	Enables users to view a list of records for a specific module (e.g., Accounts, Contacts, Leads) in Sugar.
Planned Activities Dashlet	Provides users with a list of open or upcoming calls and meetings that are assigned to them.
Active Tasks Dashlet	Allows users to view outstanding tasks that require attention and need to be completed on a future or current date.
History Dashlet	Allows users to view a history of record's related activities (e.g., calls, meetings, emails) that have already taken place.
Saved Reports Chart Dashlet	Displays charts from your saved or pre-defined reports and allows users to drill through to view associated records.
My Activity Stream Dashlet	Displays the user's main Activity Stream within a dashboard, eliminating the need to navigate to the Activity Streams view to monitor the most recent stream activities.
Forecast Pipeline Chart Dashlet	Illustrates the flow of open sales opportunities through the various sales stages by displaying the total dollar amounts for open records grouped by sales stage.

Adding Dashlets to Home Dashboards

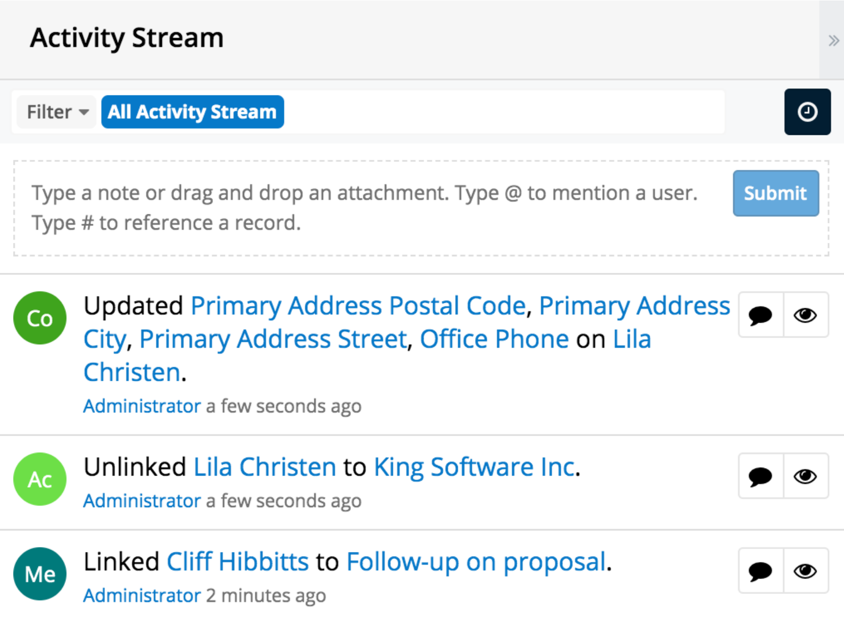
Additional dashlets can be added by clicking the floating actions button on the dashboard then selecting "Add Dashlet". By default, the floating actions button appears on the bottom-right of the dashboard but you can pin the button to the top corner by clicking the Pin to Top button in the floating actions menu. You can pin the button to the bottom corner again by clicking "Pin to Bottom" in the floating actions menu. The Add a Sugar Dashlet page will open, and you can select the title (e.g., List View) corresponding to your desired dashlet then configure the dashlet accordingly before adding it to your dashboard. For more information on adding dashlets to dashboards, refer to the Adding Dashlets section of the Dashboards and Dashlets documentation.

Please note that you can add the same dashlet multiple times in the dashboard with different configurations to show different records or information.



Activity Stream

Sugar's activity stream allows users to view a list of activities performed on records, create posts, preview posts, comment on posts, etc. Users can easily track the most recent updates across their entire organization via the record and user posts on the Home page activity stream. You can also personalize the activity stream by specifying which records' posts you wish to view in the activity stream. Please note that the modules currently enabled to generate record posts for the activity stream are Accounts, Contacts, Leads, Opportunities, Revenue Line Items, Bugs, and Cases. For more information on viewing posts, creating posts, etc. via the activity stream, please refer to the Activity Streams documentation.



Note: If you cannot access activity streams, the feature may have been disabled via Admin > System Settings. For more information, refer to the System documentation in the Administration Guide.

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Search

Overview

Sugar comes with the ability to search across the entire system to easily locate and filter records in the system. Users can perform a search via the module's list view, record view, as well as using the Sweet Spot and global search. The module search allows 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 module list view or subpanel view of the record. Sweet Spot and Global search allow users to search for information across their entire Sugar database as opposed to restricting search within a specific module. This documentation will go over the basics of the various search options and cover how to perform a search, filter a search, view results, etc.

Sweet Spot Search

The Sweet Spot search feature allows you to quickly and conveniently search Sugar from anywhere within the application. Using the Sweet Spot feature, you can find and navigate to:

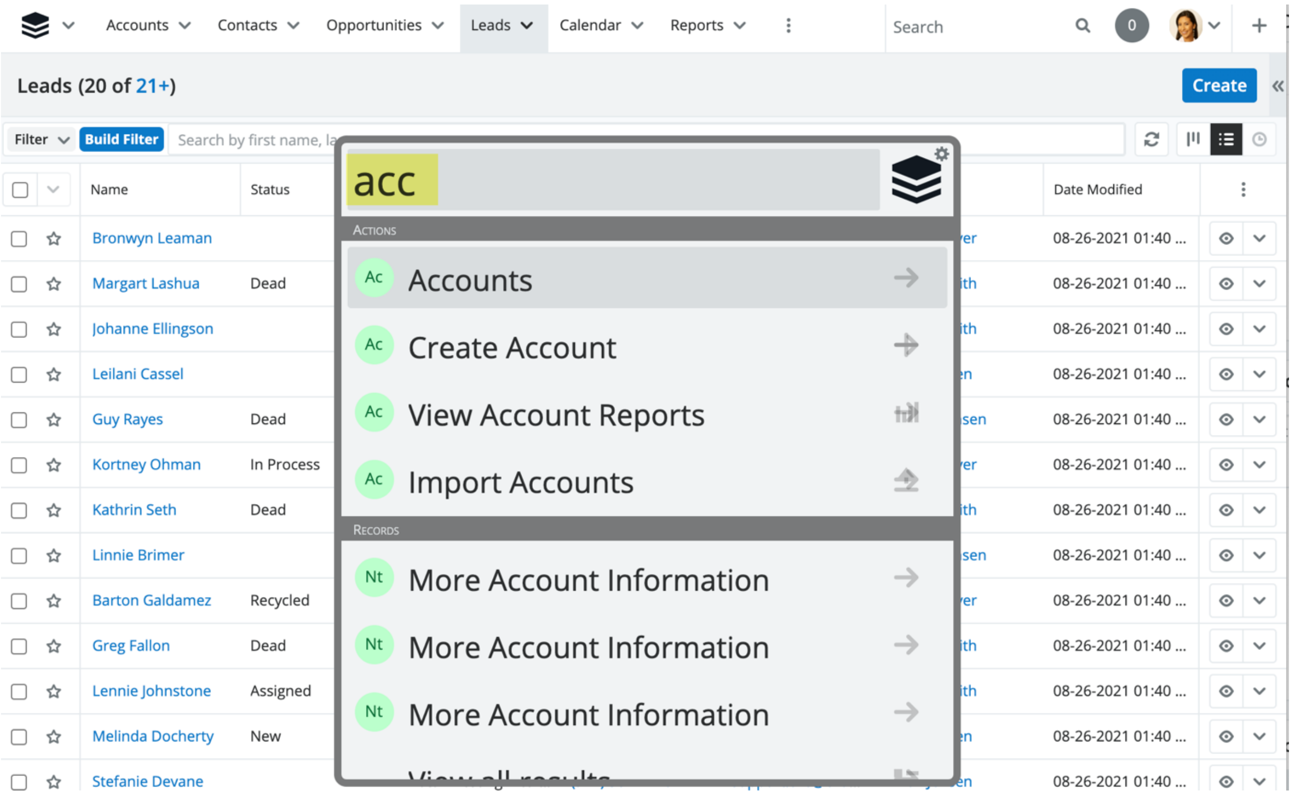
- The Home page Actions menu
- A module (e.g., Accounts, Bugs)
- Common actions in the modules' Actions menus (e.g., Create Account, View Account Reports)
- A specific record
- The user menu

You will only be able to see actions and records as allowed by your team membership, user access type, and assigned roles. If you are an administrator, you can also find and navigate to many of the sections on Sugar's Admin page.

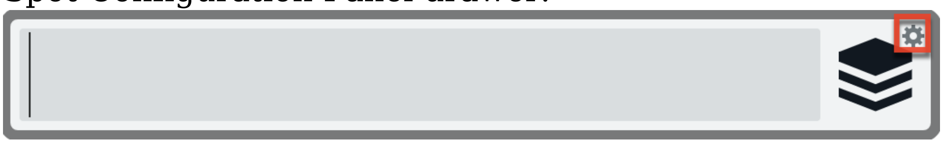
To open Sweet Spot, use the appropriate shortcut key sequence for your operating system:

OS	**Shortcut**
Mac OS X	shift+cmd+space
Windows	shift+ctrl+space
Linux	shift+ctrl+space

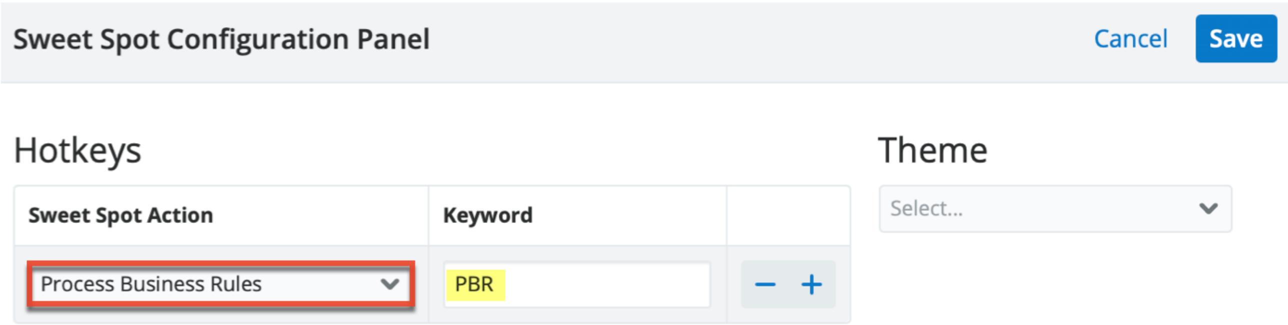
Once the Sweet Spot opens, begin typing your query and the search results will update as you type.



You can configure Sweet Spot by clicking the gear icon in the top right corner or by typing "Sweet Spot Configuration Panel" into Sweet Spot to open the Sweet Spot Configuration Panel drawer.



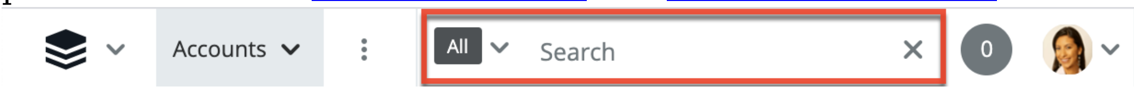
In the Sweet Spot Configuration Panel, you can configure shortcuts in the form of hotkeys. These hotkeys allow you to access your commonly accessed actions even more quickly. For example, if you frequently search for the Process Business Rules module, you can configure a hotkey so that when you type a keyword, such as "PBR", the Process Business Rules module is found. To configure a hotkey, choose the desired Sweet Spot Action from the dropdown menu, then provide the keyword that will act as the shortcut. Note that a keyword can contain multiple words. To add multiple hotkeys, click the plus button at the end of the row. To remove a hotkey configuration, click the minus button at the end of the row you wish to remove.



In the Theme dropdown menu on the right side of the Sweet Spot Configuration Panel, you can select whether you want to use the Default (i.e., system settings), Light, or Dark theme.

Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting searches to a specific module. The Global Search bar displays on the upper right of every Sugar page and utilizes Full-Text Search to search throughout nearly all fields and modules for an enhanced search experience. For more information on performing searches within a single module, please refer to the List View Search and Record View Search section.



By default, Sugar comes out-of-the-box with a defined list of fields for each module that users can search as well as view in the search results on the View All Results page. Please note that secondary fields (e.g., email address, office phone, start date) will display in the View All Results page only if they contain a value. In addition, if there is a match found in a searchable field, it will display on the View All Results page even though it is not defined as a displayed field for the module. For example, if you enter a search (e.g., John) and the system finds a match in the case's Description field, but the Description field is not configured in the record view layout for cases, the case record will appear on the View All Results page along with the description as the secondary field because it contains the search term.

Note: All email addresses (e.g., primary, secondary) in the record are included in the search. Primary email addresses have a higher relevance compared to the other email addresses for search results.

Module	Searchable Fields	Fields Displayed on View All Results Page

Accounts	Name, Email Address, Billing Street, Shipping Street, Office Phone, Fax, Alternate Phone, Description, DUNS, SIC Code	Name, Primary Email Address, Office Phone
Bugs	Subject, Bug Number, Description, Work Log	Subject, Bug Number, Status
Calls	Subject, Description	Subject, Start Date, End Date, Status
Campaigns	Name, Objective, Description	Name, Type
Cases	Subject, Description, Case Number, Resolution, Work Log	Subject, Case Number
Contacts	First Name, Last Name, Home Phone, Office Phone, Mobile Phone, Other Phone, Fax, Primary Address Street, Alternate Address Street, Portal Name, Description, Email Address	Name, Primary Email Address
Contracts	Contract Name, Description, Reference Code	Contract Name, Status
Custom Basic Type	Name, Description	Name
Custom Company Type	Name, Office Phone, Alternate Phone, Fax, Email Address, Billing Street, Shipping Street, Description	Name, Primary Email Address, Office Phone
Custom File Type	Document Name, Description	Document Name
Custom Issue Type	Subject, Number, Description, Work Log	Subject, Status
Custom Person Type	First Name, Last Name, Home Phone, Mobile Phone, Office Phone, Other Phone, Fax, Primary Address Street, Alternate Address Street,	Name, Office Phone, Primary Email Address

	Description, Email Address	
Custom Sale Type	Name, Description, Next Step	Name, Expected Close Date
Documents	Document Name, Description	Document Name
Emails	Subject, Date, From	Subject, Date, From
Employees	First Name, Last Name, Email Address	
Knowledge Base	Name, Body, Description **Note**: Only published articles are returned in Global Search.	Name
Leads	First Name, Last Name, Email Address, Home Phone, Mobile Phone, Office Phone, Other Phone, Fax, Primary Address Street, Alternate Address Street, Description	Name, Primary Email Address, Office Phone
Manufacturers	Name	Name
Meetings	Subject, Description, Location	Subject, Start Date, End Date, Status
Notes	Subject, Description	Subject
Opportunities	Opportunity Name, Description, Next Step	Opportunity Name, Expected Close Date
Product Categories	Name, Description	Name
Projects	Name, Description	Name, Status, Priority
Project Tasks	Name, Description	Name, Status
Quoted Line Items	Name, Mft Part Number	Name, Status
Quotes	Quote Subject, Description, Purchase Order Number, Quote Number, Billing Address Street, Shipping Address Street	Quote Subject, Quote Number, Quote Stage
Revenue Line Items	Name, Description, Next Step	Name, Expected Close Date
Target	First Name, Last Name,	Name, Primary Email

	Email Address, Description, Primary Address Street, Alternate Address Street	Address
Target Lists	Name, Description	Name
Tasks	Subject, Description	Subject, Status, Due Date

Please note that not all fields in Sugar are enabled by default for search, but can be enabled by an administrator. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. If the administrator globally disables a module for search, you will not be able to perform a search on that module or filter by that module when searching. For more information on how to enable and disable certain fields and modules in Global Search, please refer to the Studio documentation as well as the Search section of the System documentation in the Administration Guide.

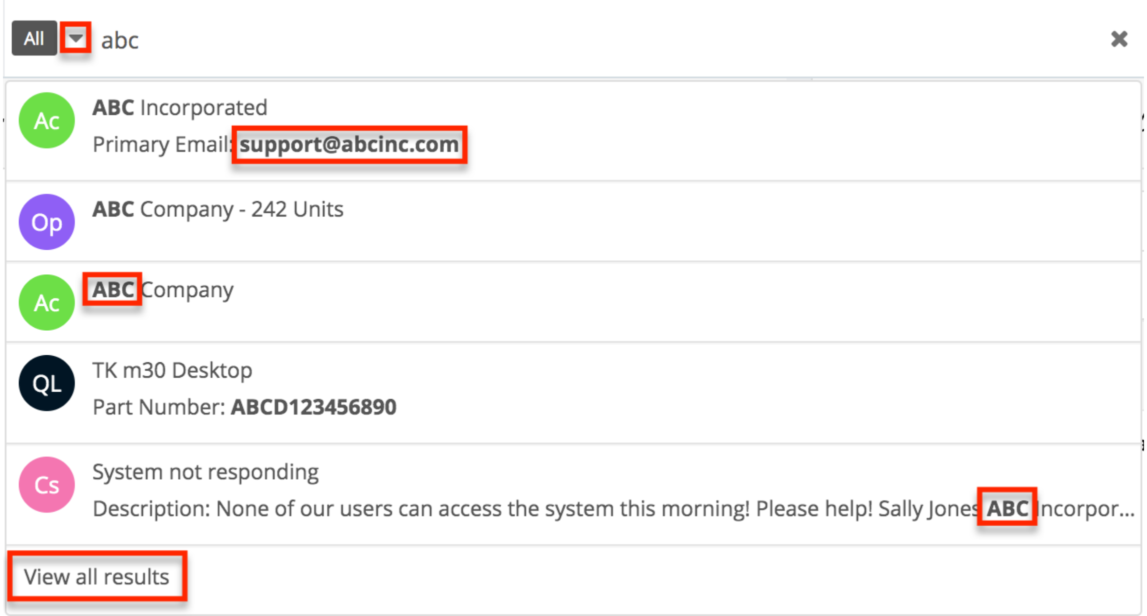
To use global search, you need to first enter a keyword into the search box and the pop-up results will begin appearing once you enter at least one character. Please note that clicking on the search bar will expand it across Sugar's navigation bar, which spans across the top of the screen. To minimize the search bar, simply click anywhere outside of the search bar or hit the Esc key on your keyboard.

Note: Elastic search strips out the non-numeric characters ("-", "()") from phone numbers so you can just enter the digits (e.g., 4082269800) when searching.

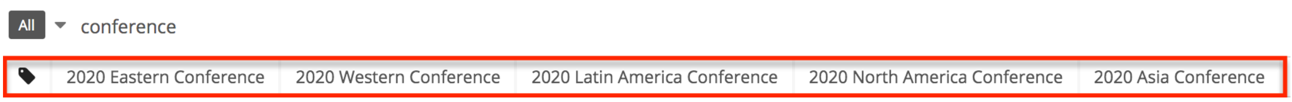
Once expanded, you will be able to access the Module dropdown by clicking the down arrow on the far left of the search box. This allows you to configure some aspects of global search such as what module(s) (e.g., Accounts, Contacts) to filter your search results by in Sugar. If you wish to clear your search term, simply click the X icon to the far right of the search box. Please note that this will collapse the search bar as well.

By default, up to five search results will display below the search box and include the primary field (e.g., name, subject) for the records matching your search term. The specific term (e.g., abc) in the record's field is bolded to indicate the match to the search term. In addition, if any secondary fields (e.g., office phone, description) match the search term as well, it will display beneath the record's primary field in the Quick Search Results list, with the matching term bolded. For any email addresses that include the matching search term, the entire email address (e.g., support@abc.com) will be bolded instead. Please note that the Quick Search Results list will display up to three matching fields for the record. To view all matching results, simply hit the Enter key while focused on the search bar or click the View all results link at the bottom of the Quick Search results list and you will be navigated to the View All Results page. Click the appropriate record (e.g., ABC Family Associates) in the Quick Search Results list to access the record's details.

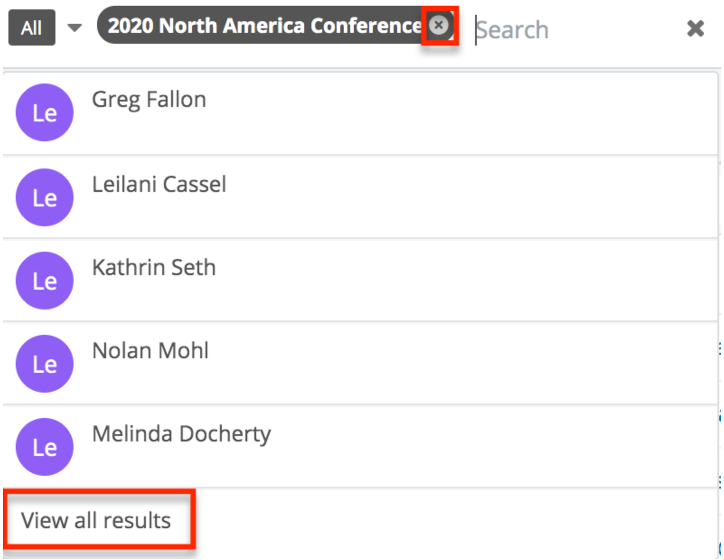
Please note that users assigned a role restricting view access to a module (e.g., Cases), will not be able to view search results specific to that module.



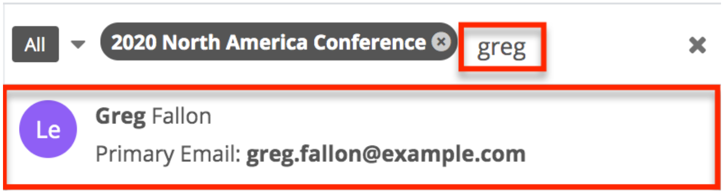
You can also perform tag searches using Global Search to easily locate groups of records that are tagged by common attributes. For more information regarding tagging records, please refer to the Tags documentation. For example, if you have a set of leads that were acquired from a specific conference and you wish to locate all the lead records tagged with this value, you can perform a search using the tag value. As you search, the list of matching tags will appear in the tag ribbon beneath the search box and display up to five tags matching the search term.



Simply select the appropriate tag (e.g., 2018 Western Conference) from the tag ribbon and the tag pill will get entered into the search box. If you wish to remove any selected tag pills from the search box, simply click the "x" to the right of the tag name. All matching records tagged with "2018 Western Conference" will display beneath the search box.



You can append additional search terms or tags in the search box if you wish to further narrow your search. Simply enter the keyword (e.g., Jeanette) to the right of the existing search term and the matching result(s) will display. If you search using multiple tags, the system will look for records that match any one of the tags in the search box using the "or" operator.



Please note that clicking the tag pill in the module's record view or the record's preview in the intelligence pane will navigate you to the View All Results page which will display the list of records that contain the same tag. When viewing the module's list view, dashlet list view, or subpanel list view, you can click the tag link to be navigated to the View All Results page.

Note: You cannot click the tag pill when editing the record to access the View All Results page.

Operators

When performing a search via global search, you can use operators such as "AND", "OR", and "NOT" in your search query to further narrow the search results. Please note that there must be at least three characters entered for each search term, and the operators must be entered in all caps (e.g., AND, OR, NOT) otherwise Sugar will consider it as a keyword to search on.

Note: Quotation marks cannot be used in multiple word searches (e.g., "John Smith") to return exact matches. So entering John Smith in your search query will return: **John** Moore with a street address of "123 **Smith** Dr.", **Smith** Company with a description of "Primary point of contact is **John** Lee", etc.

Operator	**Description**	**Example**
"AND"	Use this operator to specify search criteria where all keywords must match for records to be included in the search result.	**John AND Texas**: Search returns records (e.g., contacts) that include "John" and "Texas" in the searchable fields (e.g., Name, Primary Address City).
"OR"	Use this operator to specify search criteria where at least one keyword must match for records to be included as a search result.	**95111 OR 95113**: Search returns records (e.g., accounts) that include the digits "95111" or "95113" in the searchable fields (e.g., Billing Postal Code).
"NOT"	Use this operator if you wish to exclude records containing a specific keyword in the search query.	**John NOT Texas**: Search excludes records (e.g., contacts) that include the term "Texas" in the searchable fields (e.g., Billing State) then evaluates the remaining query to return records including "John".

The "AND" operator is implicitly added when there is a space between the search strings. For example, if you enter "John Smith AND California" into the search box, Sugar will look for records that include the term "John", "Smith", and "California" in the searchable fields (e.g., Name, Billing State). If there are records that match the search terms in the query, the record will display in the Quick Search Results list. The term(s) (e.g., Smith) in the record's fields will be bolded in the search result to indicate the match to the search term.

When entering your search criteria, you can also use a combination of the operators. Use parentheses if you wish to group a part of your search query. When using the parentheses to create subqueries, Sugar will first parse the subquery contained in the parentheses before evaluating the remaining query. For example, if you enter: "(Johnson OR Jonson) AND Systems", Sugar will return records including "Systems" with "Johnson" as well as "Systems" with "Jonson" in the searchable fields (e.g., Name: **Johnson Systems**, Name: **Jonson** with Website: www.**jonsonsystems**.com).

Note: When using the NOT operator, please keep in mind that it cannot be used in direct combination with parentheses (e.g., NOT (John Smith)).

The following are example search queries using the available operators in global search:

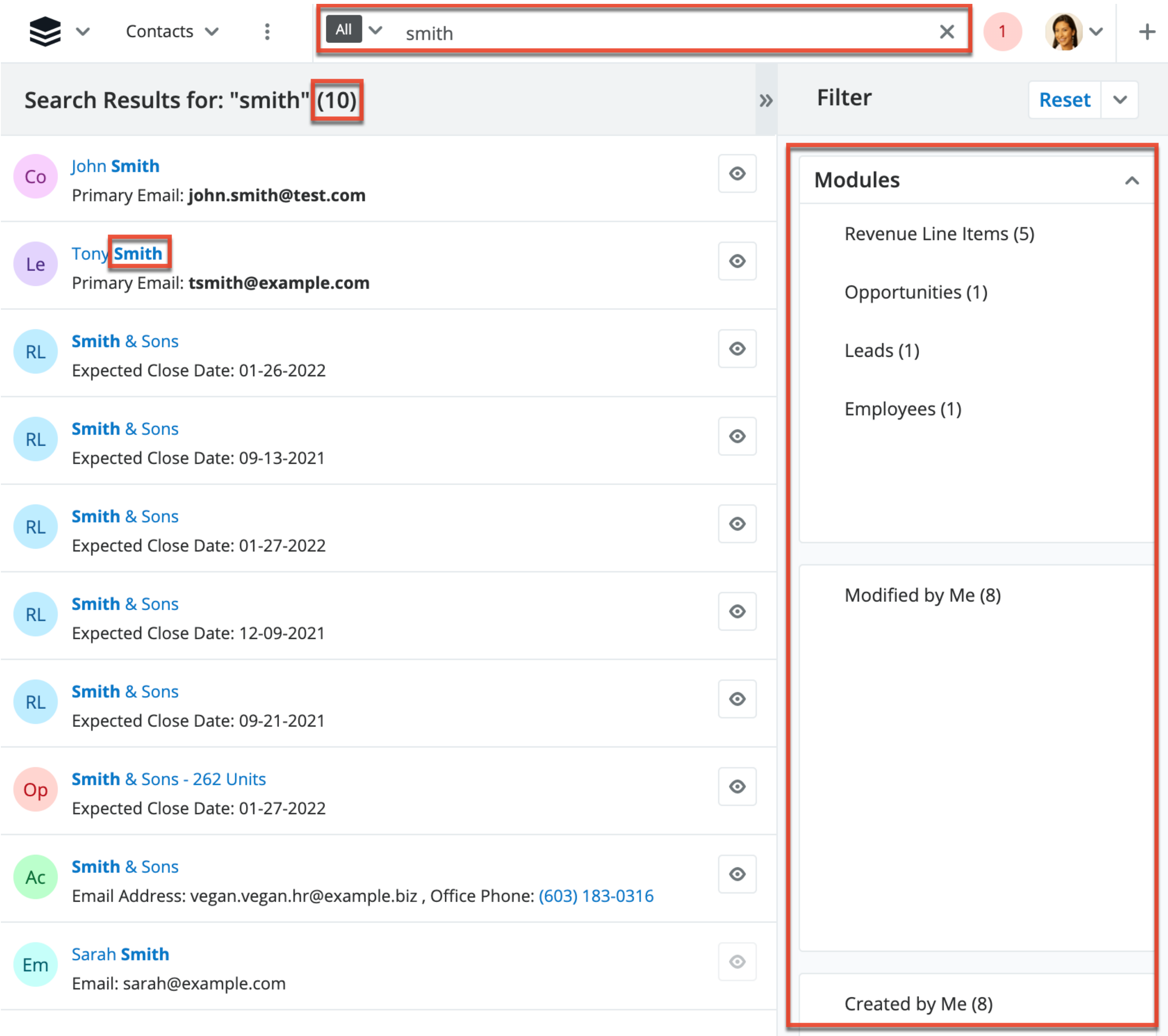
Search Criteria	**Matching Search Results**
Jane AND @example.com	**Jane** Roberts Email: jroberts**@example.com**
	ABC Company Primary Address Street: 123 **Jane** St. Email: support**@example.com**
	J Thomas Email: **jane@example.com**
(NOT John OR NOT Jane) Smith	Bob **Smith** Email: bob.**smith**@example.com
	Mary Smith Email: marys@**smith**company.com
(ABC Technologies) OR (ABC Corporation) Brooklyn	**ABC** Inc. Billing Street: 123 **Technologies** Dr. Billing City: **Brooklyn**
	ABC Corporation Billing City: **Brooklyn**
Bob AND (Smith OR Jones) AND Idaho NOT Boise	**Bob Smith** Company

	Billing State: **Idaho** Billing City: Nampa
	Bobby Lee **Jones** Primary Address State: **Idaho** Primary Address City: Meridian
(Jenn OR Jennifer) Martin AND Texas	**JenniferMartin**ez Email: j**martin**ez@abc.com Primary Address State: **Texas**
	JennMoore Email: j**martin**@example.com Primary Address Street:123 **Texas** Dr.

Viewing All Results

If there are more than five matching results, you can click on "View all results" at the bottom of the Quick Search Results list to view all matching records. The View All Results page loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. The total number of matching search results will display on the upper left of the page. By default, Sugar displays 50 records for each search results set on the View All Results 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. To load the next set of Global Search results, simply click on "More search results" at the bottom of the View All Results page.

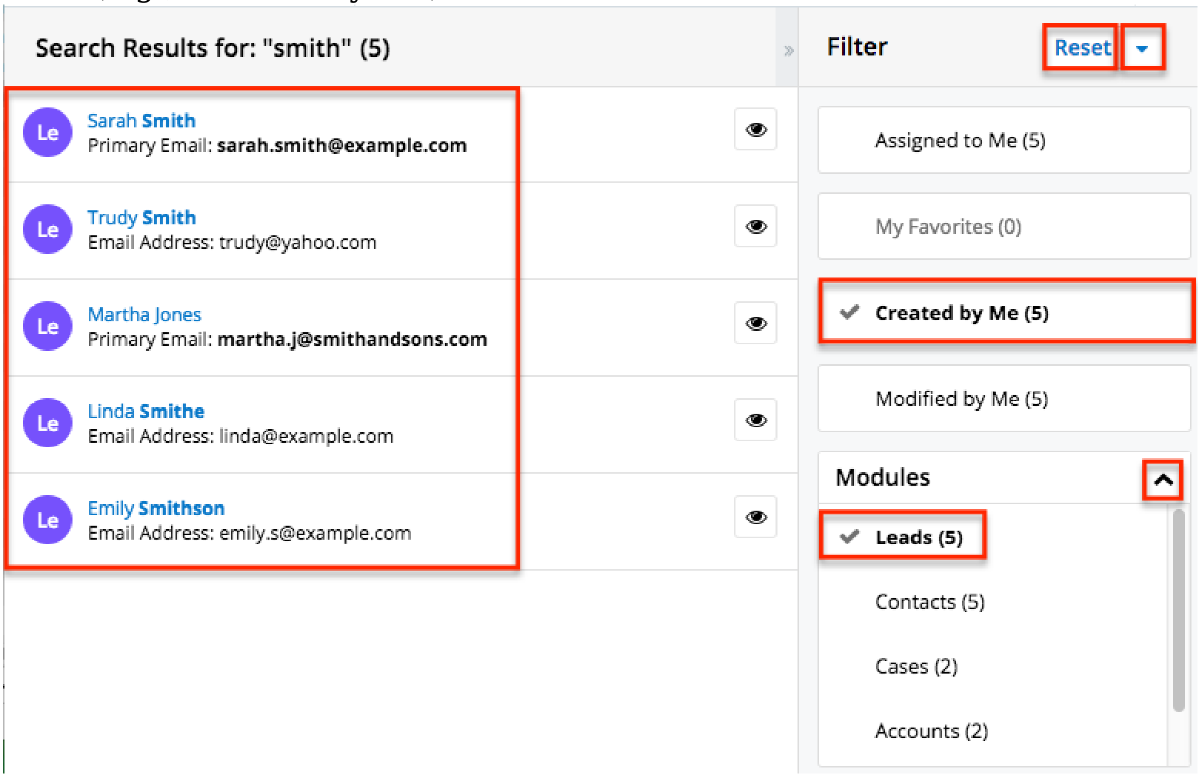
If you wish to view the full details of a record, click the record's name to open the record view (or detail view for Legacy modules). You can also view a record's details directly from the View All Results page by clicking the Preview button to the far right of a record's row. Please note that preview is only available for modules (e.g., Contacts, Leads) using the Sidecar user interface. The record's details will display in the intelligence pane to the right of the View All Results page and will provide users with key information regarding the record as well as any related activity stream information. For more information on previewing via the intelligence pane, please refer to the Dashboards & Dashlets documentation.



Filtering the View All Results Page

When not in preview mode, the intelligence pane to the right of the search results displays various Filter options (e.g., Assigned to Me, Created by Me) that allow you to further narrow the search results on the View All Results page. Please note that the filters only apply to the set of search results based on your current search query.

Each of the filter options displays a number in parentheses to indicate the number of records from the View All Results page that meet the criteria. Any filter option (e.g., My Favorites) that displays a zero count will not be clickable as there are no records that meet the criteria. As you select filter options, the search results on the page will dynamically change to only display records meeting the currently applied filter(s). In addition, the counts for all of the filter options will dynamically change to indicate the total count of records that meet the currently selected filter(s). For example, if you select "Leads" under the Modules filter, the counts next to each of the other filter options (e.g., Created By Me, Modified by Me) will change according to the number of results which are both a lead and match the particular filter (e.g., Created By Me).



Selecting multiple filter options within a single filter (e.g., Modules) will use an "or" operator. So if you select "Leads" and "Contacts" from the Modules filter, the View All Results page will display both lead and contact records. However, if you select filter options from different filters, it will use an "and" operator. For example, if you select "Leads" from the Modules filter and select "Created by Me", Sugar will only return lead records that you created.

To clear individual filters, click the filter again (e.g., Created by Me) to unselect the option. If you wish to clear all filters applied on the View All Results page, simply click the Reset button on the upper right of the intelligence pane.

To collapse a multi-option filter (e.g., Modules), you can click the Up arrow on the upper right of the filter. If you wish to collapse all multi-option filters (e.g., Modules) on the intelligence pane, click the Actions menu to the right of the Reset button and select "Close All". To expand them, simply click the Actions menu again and select "Open All".

Filtering by Module

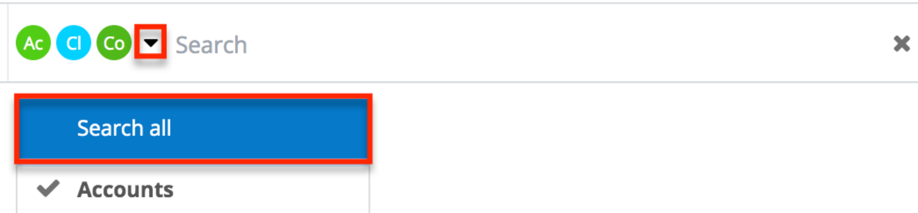
Global Search gives you the option to filter the search results by module by clicking the down arrow to the far left of the expanded search bar. Please note that the Search all option is selected by default to include all modules when searching. The list of available modules to select will appear in the Modules list and you can simply select the appropriate module(s) you wish to include in your search. For example, if you select the Contacts module then enter "john" in the search box, Sugar will only return matching contact records.

When three or fewer modules are selected from the Modules dropdown, the corresponding Module icons will display in the search bar.

However, if more than three modules are selected, it will display the Multiple Modules icon in the search bar.

Note: The selected module(s) will remain in the search bar until the user's browser cache is cleared.

If you wish to unselect all modules at once, simply select the Search all option from the Modules dropdown. Please note that manually deselecting all modules will default back to the Search all option as well.



Administrators can configure what modules are available to select in the Modules list via Admin > Search. For more information on configuring which modules are available to search via Global Search, please refer to the Search section of the System documentation in the Administration Guide. Please note that only modules you have view access for will appear in the Modules list for Global Search.

Keyboard Navigation

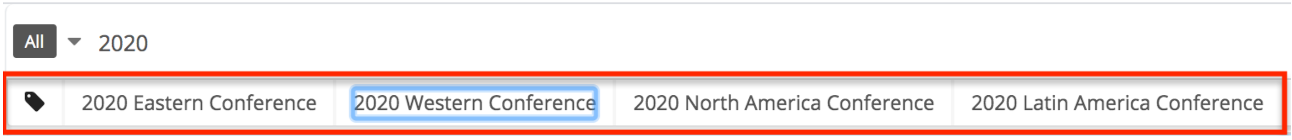
Using the Tab key (Alt+Tab for Safari browser) on your keyboard enables you to easily navigate through Sugar's navigation bar which spans across the top of the screen. You will be able to use the Tab key to access the Global Search bar and perform a search. For more information on navigating around Sugar using your keyboard, please refer to the Accessibility documentation. Once you have tabbed into the Global Search field, enter at least one character to expand the global search bar. Please note that hitting the Enter key while in the search box will navigate you to the View All Results page where you can also perform a search. If you hit the Tab key within the search bar without entering in a search term, the Magnifying Glass icon will be highlighted and you can hit "Enter" to be navigated to the View All Results page as well.

Note: You can use global shortcut keys to access and exit the Global Search field as well. For more information regarding global shortcut keys, please refer to the Accessibility documentation.

Once you enter a search term, you can use the Up and Down arrow keys on your keyboard to navigate through the Quick Search Results list and hit "Enter" while focused on a specific quick search result (e.g., Jane Smith) to open up the module's record view (for Sidecar modules) or detail view (for Legacy modules). Please note that hitting the Tab key while navigating through the quick search results will close the Quick Search Results list and highlight the X icon in the Search bar, which will allow you to clear your keyword and perform a new search. Please note that the Global Search bar will collapse as well when clicking the X icon to clear search. Hitting the "Shift" and "Tab" key will close the Quick Search Results list and highlight the search term in the search bar, allowing you to perform additional searches.

In addition, you can easily navigate through the Modules dropdown list using the Up and Down arrow keys on your keyboard and hitting the Spacebar key to select or unselect a module. Hitting the Tab key while navigating through the Modules dropdown list will close the dropdown and take you back to the search bar. If you wish to clear the text entered in the search box, you can either click the X icon or hit the Tab key while in the search box to highlight the X icon, then hit "Enter" or the Spacebar key.

To navigate through the tag ribbon, you can use either the Tab key or Arrow keys on your keyboard. To add a tag pill to the search bar, simply hit the Enter key while focused on the tag pill (e.g., 2018 Latin America Conference) in the tag ribbon. Hitting the Enter key again on the newly added tag pill in the search bar will open up the View All Results page to display all matching results.



In addition, you can tab through the View All Results page to highlight and access certain elements (e.g., Search box, Intelligence Pane, Preview button) of the page. For example, if you press "Enter" while focused on the Preview button, the record's data will display to the right of the search result providing key information regarding the record.

Admin Configuration

Sugar administrators have the ability to globally enable and disable modules for Global Search. Please note that disabled modules will not be included in search results nor in the list of modules to filter. For more information on how to enable and disable modules for Global Search, please refer to the Search section of the System documentation in the Administration Guide.

Administrators also have the ability to enable and disable specific fields for Global Search, as well as set the priority for searchable fields using boost values. To configure fields for search, simply navigate to Admin > Studio and update the Full-Text Searchable option to either "Searchable" or "Disabled" depending on whether you want it included for search or not. The Full-Text Searchable option is only available for the following data type fields: Phone, TextArea, TextField, and URL. Boosting is the process of enhancing the relevancy of a record's fields for global search. Fields with a higher boost level will be given greater weight when the search is performed. When a search is performed, matching records containing fields with a greater weight will appear higher in the search results. The default boost value is 1.0 which stands for a neutral boost. To apply a positive boost, set the boost value higher than 1. To apply a negative boost, use values lower than 1. For example, a value of 1.35 will positively boost a field by 135%. But using a value of 0.60 will apply a negative boost. Please note that it is not necessary to perform a full system index when boost values are changed for fields. For more information on how to enable or disable fields for Global Search or change the boost values, please refer to the Studio documentation in the Administration Guide.

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, which may require a system index to be performed. You can perform a system index manually via Admin > Search. For more information on how to run a system index on Full-Text Search, please refer to the System documentation in the Administration Guide.

Advanced Options

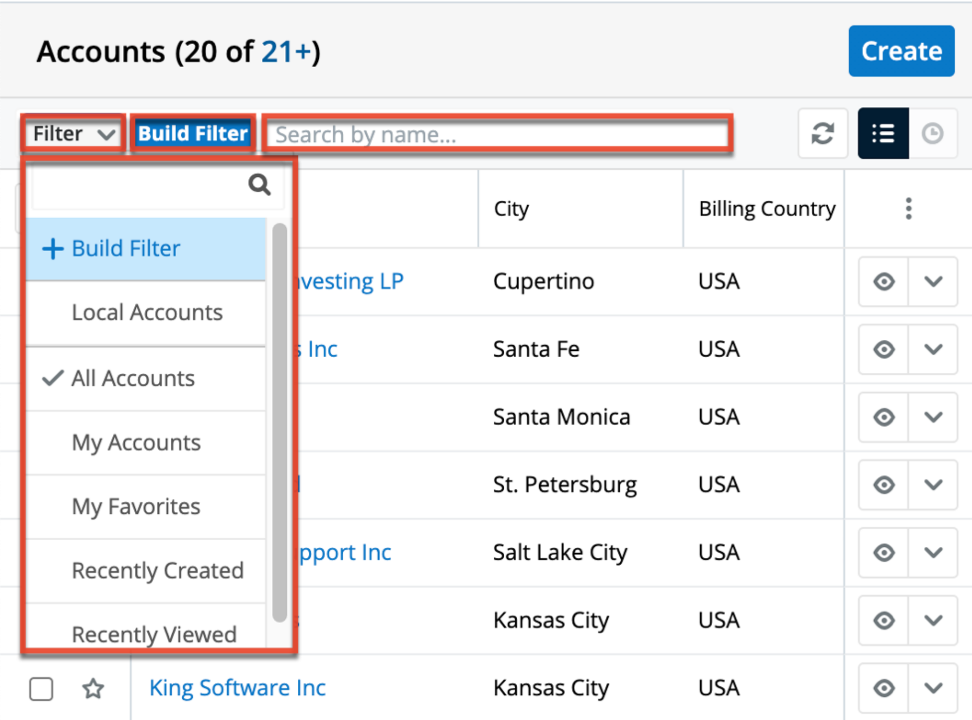
The Advanced Options panel is available on the view all results screen of Global

Search to allow users to enable and disable modules for the Filter by list specific to their login. Please note that administrators have the ability to globally enable and disable modules for global search via Admin > Search. If the administrator globally disables a module, you will not be able to perform a search on that module or filter by that module when searching. The module will also no longer appear within the Advanced Options panel. For more information on how to globally enable and disable modules, please refer to the System documentation in the Administration Guide.

List View Search (Sidecar Modules)

List view search enables users to easily and effectively search by a record name in a module-specific manner to pull up relevant results they wish to view. The matching records will populate in the list view below the Search bar. Please note that the system retrieves all records that start with the keyword entered in the search. When looking up names, Sugar performs an OR search for each name entered. Records matching any of the names entered will appear in the list view. Sugar's list view search also supports wildcard characters (e.g., %) to search for records without including the entire word in the search query. For example, a search for "%univ" will pull up any records containing "univ", including "The University of Miami", "Miami University" or "Universidad de Miami". For more information on how to use wildcards in list view searches, please refer to the Wildcards section.

In addition, the search provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options on the list. For more information on the available filter options, please refer to the Filter section.



When you choose a filter and run a search, Sugar will return records with a matching name from within the filtered list view results. For example, if you select "My Accounts" in the Filter list and enter an account name, Sugar will only return account records with a matching name that are assigned to you. You can also build new filters if you wish to add more complex filters for your search criteria. For more information on building new filters, please refer to the Creating a Filter section. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

To see all records to which you have access, simply select the All "Module Name" (e.g., All Accounts) option in the filter. 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 documentation in the Administration Guide.

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 combination of wildcard characters in the Search box as you desire. The following wildcard characters can be used in the List View search box:

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

Please note that list view 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.

When performing a multiple-word search, Sugar will behave differently based on the module (e.g., Accounts, Contacts) in which you perform the search. For example, performing a search for "Max Hold" in the Accounts module will match an account named "Max Holding Company" but will not match "Maximum Holding Company" because the wildcard is appended to the end of the entire query (e.g., Max Hold%). However, if the same search is performed for "Max Hold" in the Contacts module, it will return search results matching a contact named "Max Holder" as well as "Maximillian Holder" because it appends a wildcard to the end of each word in the query (e.g., Max% Hold%). Please note that the latter behavior applies to any person-type module (e.g., Leads) to account for search results that may contain multiple words in the First Name and/or Last Name field (e.g., "Jean Paul" as a first name).

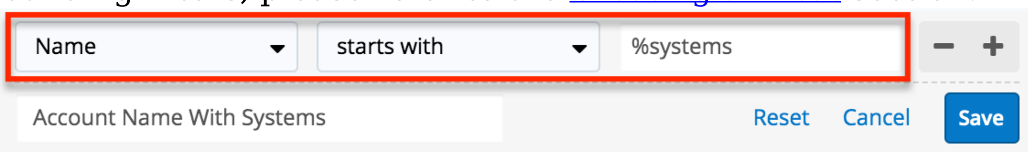
The following search examples illustrate List View search behavior:

Search Criteria	Matching Search Results	
	First Name	Last Name
rob	**Rob** **Rob**erta John	Smith Collins **Rob**erts
%bert	**Bert** Ro**bert**a John	Andernie Collins Ro**bert**s
r_b	**R**o**b**erta **R**u**b**y John	Collins Lieu **R**o**b**erts
%r_b	**R**o**b** John Mi**r**a**b**el	Smith **R**o**b**erts Glaston
__it	Rob An**it**a	Sm**it**h Nother
r_b% smit%	**Rob**ert **Rob**	**Smit**h **Smit**e

rob smith	**Rob** **Rob**ert **Rob** Roy	**Smith** **Smith** **Smith**
smith	Rob **Smith**	**Smith** Johnson
jean	**Jean**nine **Jean** Paul	Pugh Gaultier
paul	Sue **Paul**	**Paul**son Jones
jean paul	**Jean** **Jean Paul**	**Paul** Gaultier

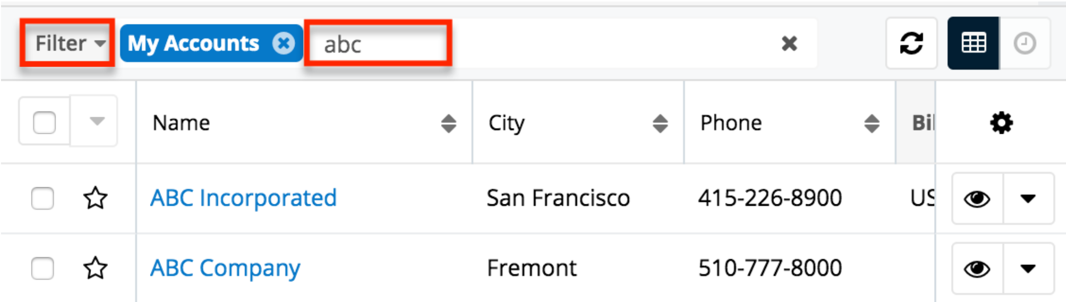
When performing a search, Sugar will try to match your search text to the beginning of a record's field. So, if an account name starts with an article like "A" or "The", this must be accounted for in the search by adding a wildcard (%) at the beginning of your text. For example, to properly pull up an account named "The ABC Company", you will have to enter "%abc" for Sugar to find a match in the system.

In addition, you can use the wildcard character when specifying the search criteria for custom filters with the "starts with" operator. Please note that the wildcard character will only work with the "starts with" operator. For example, if you wish to find all records containing the word "systems", then you can use the "starts with" operator and type "%systems" as the filter value. For more information on building filters, please refer to the Creating a Filter section.

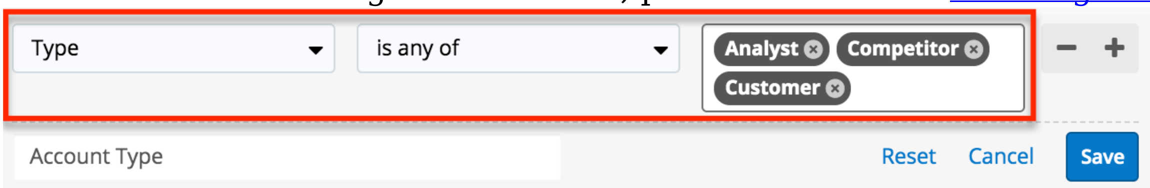


AND vs OR

When searching in the List View search, Sugar uses the "and" operator. This means that if you are searching against multiple fields in your filter option, Sugar will place an "and" in between each search field returning only records matching all (as opposed to any) of your search criteria. For example, if you select "My Accounts" in the Filter options and enter an account name, Sugar will only return account records with a matching name that are assigned to you.



The only time Sugar will use the "or" operator is when using a multi-select option in the search criteria. For example, you can build a custom filter for the Accounts list view search and select "Type", "is any of", then add "Analyst", "Customer", and "Partner". If you perform a search based on this new filter, the system will return account records that match any one of the values specified in the filter. For more information on building custom filters, please refer to the [Creating a Filter](#) section.



Please note that if any additional fields (e.g., industry, status) are added to the custom filter, the operators between the Type field and the other fields will be an "and" operator.

Filter

List View search provides a Filter option that allows users to narrow their search further using the available options on the list.

The following options are available to users when filtering their List View search:

- **Build Filter**: Build a new custom filter that you can use to filter your search
- **All "Module Name"**: Returns all records in the module to which you have access
- **My "Module Name"**: Returns only records assigned to you
- **My Favorites**: Returns only records you have marked as favorites
- **Recently Created**: Returns only records you created in the module within the last 7 days
- **Recently Viewed**: Returns only records you have viewed in the module within the last 7 days

When you choose a filter and run a search, Sugar returns records with a matching name from within the filtered list view results. You can use one of the default filter options from the list or build a custom filter if you wish to have more complex filters options when searching.

Note: Only the fields that you have permission to view and that the administrator has configured to be available will appear in the Filter list when creating a search filter. For more information on field-level permissions, please refer to the Role Management documentation in the Administration Guide. For more information on adding and removing fields to filters in list view, please refer to the Studio documentation in the Administration Guide.

When you run a search using a filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. In contrast, searches performed using only the list view's Search box are not preserved when navigating away.

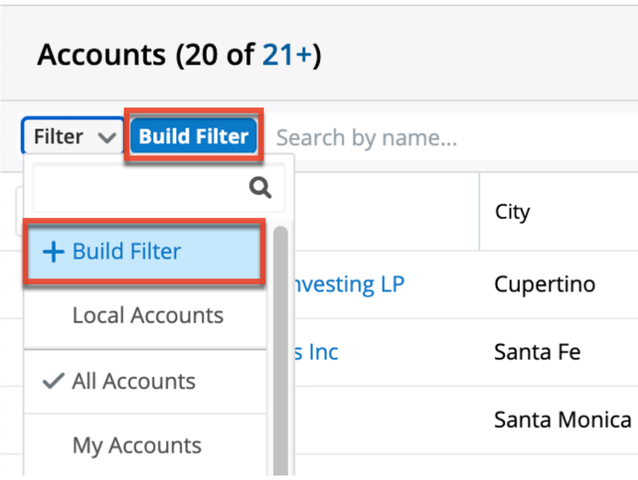
Creating a Filter

Users can create and save new filters via the Build Filter option in the Filter list of the search bar. Filters may contain one or more fields and operators (e.g., is any of, is, starts with) along with their desired value(s). All of a filter's criteria must evaluate as true for a record to appear in the list view search result. Filters may also be saved as templates with empty field values to be completed at the time the filter is run. This is useful for searches that must be performed often against the same fields but with varying values.

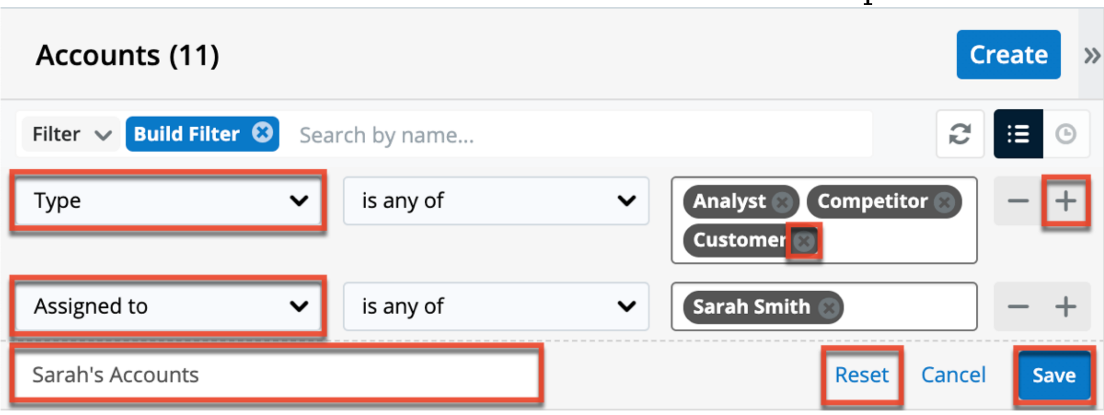
The following steps cover building a filter for accounts with a type of "Customer", "Competitor", or "Partner" and assigned to Sara Smith as an example:

1. Click the Filter option on the Accounts search bar then select "Build Filter".

   Note: You can also click "Build Filter" to the right of the Filter option.



2. Select "Type" as the filter field and select the "is any of" operator then add "Competitor", "Customer", "Partner" as the search values. As you create the new filter criteria, it will be applied to the list view concurrently to display the matching results. To remove specific filter values (e.g., customer, partner), you can simply click the "x" to the right of the field or you can select "Reset" to the left of the Save button to clear all filter values.
   Note: The "is any of" operator allows the system to pull up records that match any one of the set values (customer, competitor, partner).
3. To add additional fields (e.g., Assigned to) to the new filter, click the Add button to the right of the filter.
   Note: Only the fields that you have permission to view and that the administrator has configured to be available will appear in the Filter list when building a search filter. For more information on field-level permissions, please refer to the Role Management documentation in the Administration Guide. For more information on adding and removing fields to filters in list view, please refer to the Studio documentation in the Administration Guide.
4. Select "Assigned to" as the secondary filter field and select the "is any of" operator then add "Sarah Smith".
5. Enter a descriptive title for the filter (e.g., Sarah's Accounts) in the field that contains "Enter new filter name...".
6. Click "Save" to add this filter to the module's Filter options.



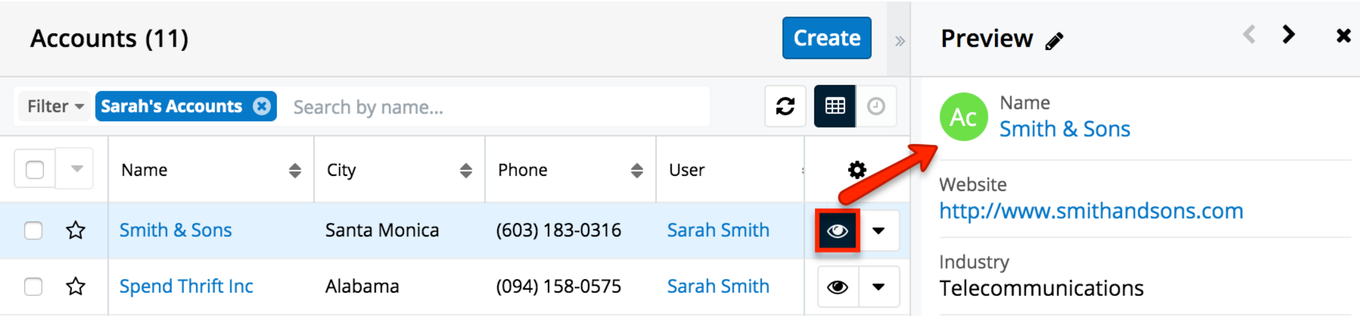
You can also build and save a filter without entering any filter values (e.g., Customer) if you wish to enter new values each time you utilize the filter. When re-using the filter simply enter the appropriate filter value(s) and the list view will display the matching results. Once you are done with the filter, click "Reset" to the far right of the filter's name to clear the filter value(s).

The custom filter can always be edited as necessary by selecting the filter and updating the fields, conditions, values, etc. via the filter details panel. Once the necessary updates have been made, click "Save" to preserve the changes.

Please note that you can easily delete custom filters by selecting the filter (e.g., Sarah's Accounts) from the Filter list, clicking the filter's name on the Search bar, then clicking "Delete" on the filter details panel.

Preview

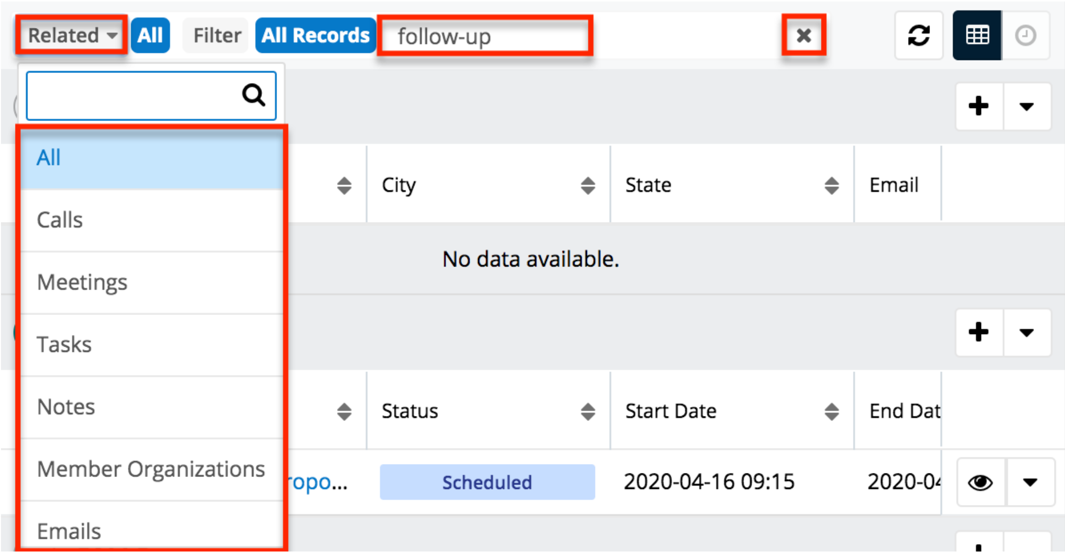
Once the list view displays the search results, users can easily view the record's details directly from the module's list view by clicking the Preview button to the far right of the record's row. The record's detail will display in the intelligence pane to the right of the list view and provide users with key information regarding the record as well as the related activity stream information. For more information on viewing previews, please refer to the [Previews] section of the User Interface documentation.



Record View Search (Sidecar Modules)

Users also have the ability to search for related records which appear in the subpanels of the record view. The Search bar appears below the record's fields and you can filter the view to only display a specific module (e.g., Leads, Contacts). You can search by a record name by entering the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. Please note that the system will retrieve records from the subpanel that start with the keyword entered in the search box. To clear the search, simply click the "x" to the right of the search keyword and all records meeting the search criteria will display in the corresponding subpanel(s). When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page.

To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. For more information on how to filter records for search, please refer to the [Filter] section. Please note that filter and search may be combined to only display matching records within the selected module's subpanel. To see all subpanels to which you have access, simply select "All" in the Related dropdown list.

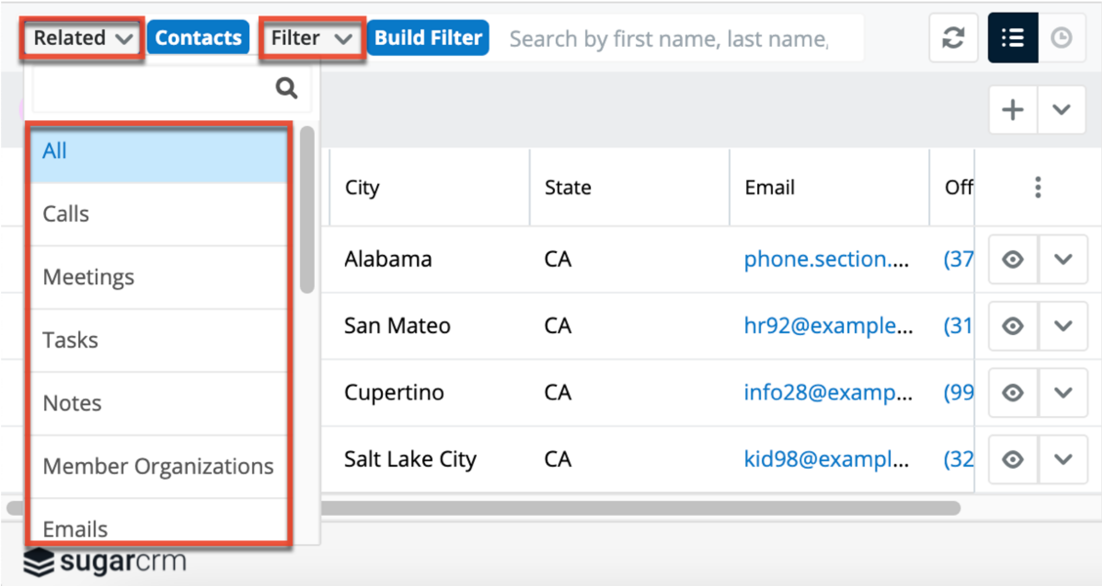


Related Records Search

Users can search for related records simply by entering in the name of the record in the Record View's search box. Please note that the system will only search for related records which appear in the subpanels of the record view. The relevant record(s) meeting the search criteria will display in their respective subpanels. Users have the option to filter the view to only display a specific module if they wish by selecting the module (e.g., Contacts, Leads) from the Related list. For more information on searching within a specific module, please refer to the Related Module section.

Related Module

When searching for records that appear in the subpanels of the record view, you can filter the view to only display a specific module (e.g., Leads, Contacts). Simply click the Related option to the far left of the Search bar then select the module whose subpanel you wish to view. Please note that you can narrow your search further using the Filter option to the right of the Related option. For more information on searching using the Filter option, please refer to the Filter section. To see all subpanels to which you have access, simply select "All" in the Related dropdown list.



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 combination of wildcard characters in the search box as you desire.

The following wildcard characters can be used when searching for related module records in record view:

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

Please note that 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 and not all words.

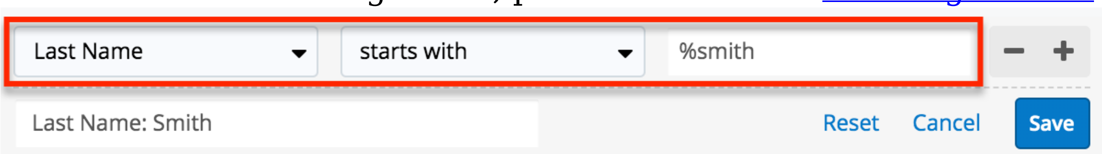
The following are example searches using wildcards in record search:

Search Criteria	Would Match	Would Not Match
rob	**Rob**, **Rob**ert, **Rob**in	Bob, Jacob
%bert	Al**bert**, **Bert**, Ro**bert**	Bart
r_b	**Rob**ert, **Rub**y	Bob, Raab

%s_i	Du**sti**n, Chri**sti**, **Smi**th	Sophie, Josephine
__it	**Nit**a, **Lit**trell	Schmitt
r_b% smit%	**Robert Smit**h, **RobSmit**e	Bob Smith, Robert Phillip
rob smit	**Rob Smit**h, **Rob Smit**e	John Smith

When performing a search, Sugar will try to match your search text to the beginning of a record's field. So, if an account name starts with an article like "A" or "The", this must be accounted for in the search by adding a wildcard (%) at the beginning of your text. For example, to properly pull up an account named "The ABC Company", you will have to enter "%abc" for Sugar to find a match in the system.

In addition, you can use the wildcard character when specifying the search criteria for custom filters with the "starts with" operator. Please note that the wildcard character will only work with the "starts with" operator. For example, if you wish to find all related contact records containing the word "smith", then you can use the "starts with" operator and type "%smith" as the filter value. For more information on creating filters, please refer to the Creating a Filter section.



Filter

Record view search provides a Filter option that allows users to narrow their search further using the available options on the list.

The following options are available to users when filtering their Record View search:

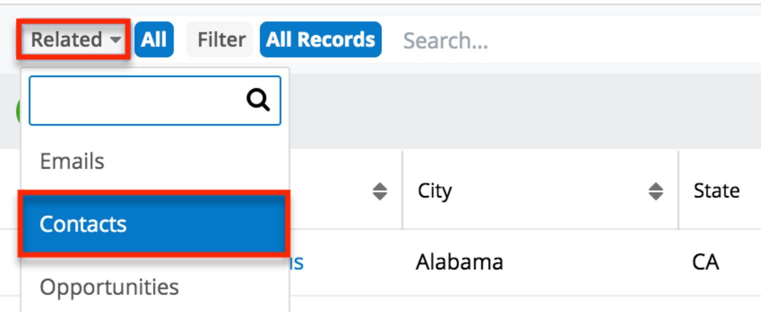
- **Build Filter**: Build a new custom filter that you can use to filter your search.
- **All "Module Name"**: Returns all records in the module to which you have access
- **My "Module Name"**: Returns only records assigned to you
- **My Favorites**: Returns only records you have marked as favorites
- **Recently Created**: Returns only records you created in the module within the last 7 days
- **Recently Viewed**: Returns only records you have viewed in the module within the last 7 days

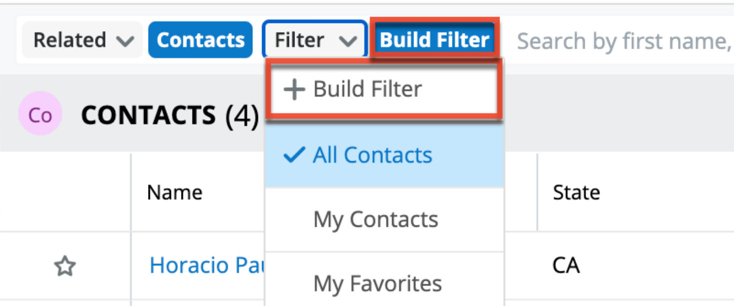
While in the record view, users can search for records that appear in subpanels beneath the record's fields and filter the view to only display a specific subpanel (e.g., Contacts, Accounts). When you choose a filter and run a search, Sugar returns records matching the search criteria for the specified related module in the record view. You can use one of the default filter options from the list or build a custom filter if you wish to have more complex filter options when searching.

Creating a Related Records Filter

Users can also create new filters via the Build Filter option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the module's record view. You have the option to add multiple fields to your new filter and set select operators (e.g., is any of, is, starts with) along with the value(s) it must contain. Please note that each one of the filter's criteria needs to be true for a record in order for it to appear in the subpanel view's search result. Unlike building a filter for the list view search, you must first select a module from the Related list then select the Build Filter option as it is specific to that module.

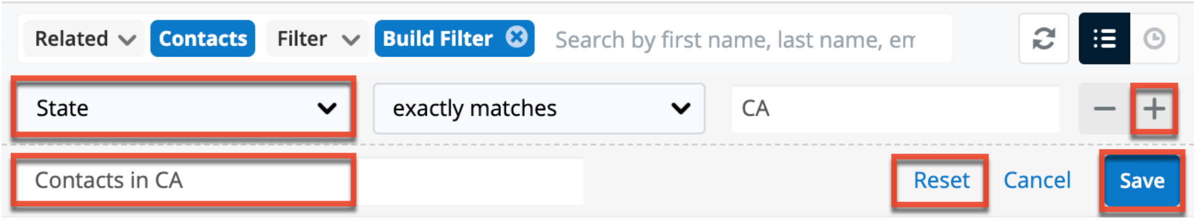
The following steps cover building a filter for the related Contacts module located in the state of "CA" as an example:

1. Click the Related option on a module record view's (e.g., Accounts) search bar then select "Contacts".


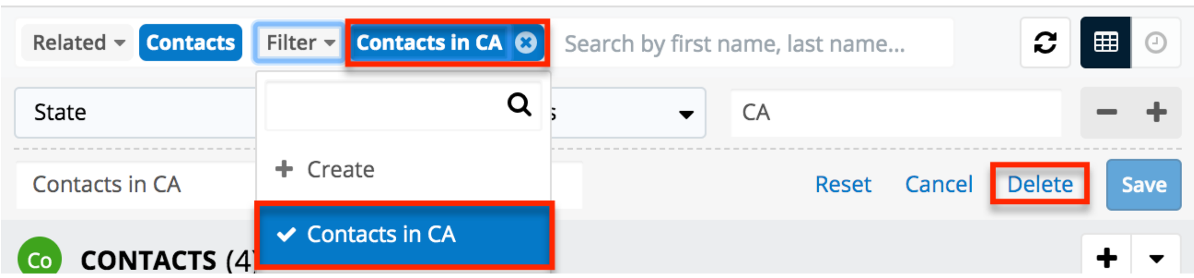
2. Click the Filter option on the Search bar then select "Build Filter".
    - You can also click "Build Filter" to the right of the Filter option.


3. Select "State" as the filter field and select the "exactly matches" operator then enter "CA" as the search value. As you add in the filter criteria, it will be applied to the subpanel view concurrently to display any matching results.
    - To clear any filter values (e.g., CA), simply select "Reset" to the left

of the Save button.
   - You can also remove filter values by clicking the "x" within the search value (if applicable).
4. To add additional fields (e.g., Assigned to) to the new filter, click the Add button to the right of the filter dropdown list.
5. Enter a descriptive title for the new filter (e.g., "Contacts in CA") in the field that contains "Enter new filter name...".
6. Click "Save" to add this filter to the related module's Filter dropdown list.

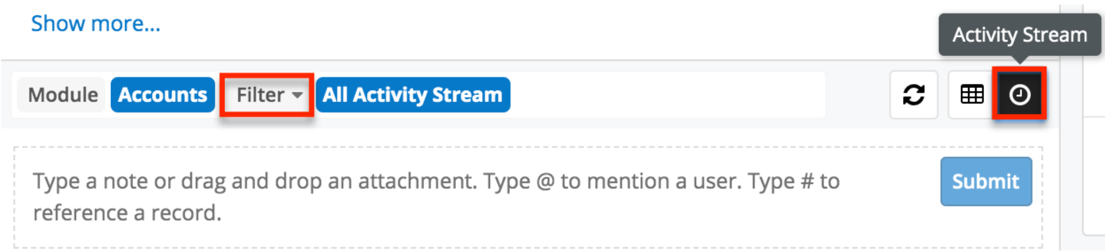


The filter will now appear as an option in the Filter list when "Contacts" is selected as the related module. Please note that you can easily delete custom filters by selecting the filter from the Filter list of the related module (e.g., Contacts), clicking the filter's name (e.g., Contacts in CA) on the search bar, then clicking "Delete" on the filter details panel. You can also edit the custom filter as necessary via the filter details panel then click "Save" to preserve the changes.



Activity Stream Search

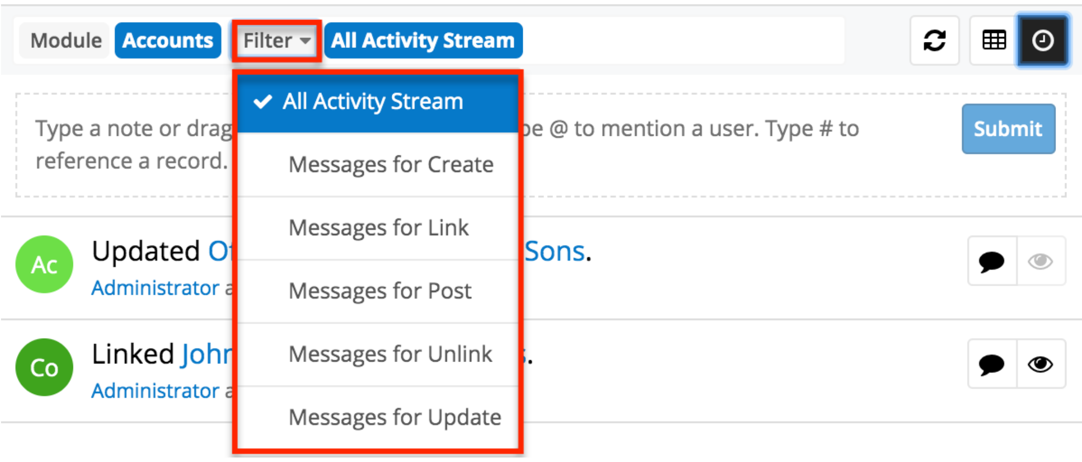
The record view's activity stream displays all posts specific to the current record you are viewing. Please note that users can view all post's in the record view's activity stream even if they do not follow the record in Sugar. To access the record view's activity stream, navigate to the module's record view (e.g., ABC Company) then click the Activity Stream button below the module's fields. For more information on activity streams, please refer to the Activity Streams documentation. You can filter the posts on the activity stream based on the activity type by selecting one of the available options on the Filter list. For more information on filtering the activity stream, please refer to the Activity Type Filter section.



Note: If you cannot access activity streams, the feature may have been disabled via Admin > System Settings. For more information, refer to the [System](#) documentation in the Administration Guide.

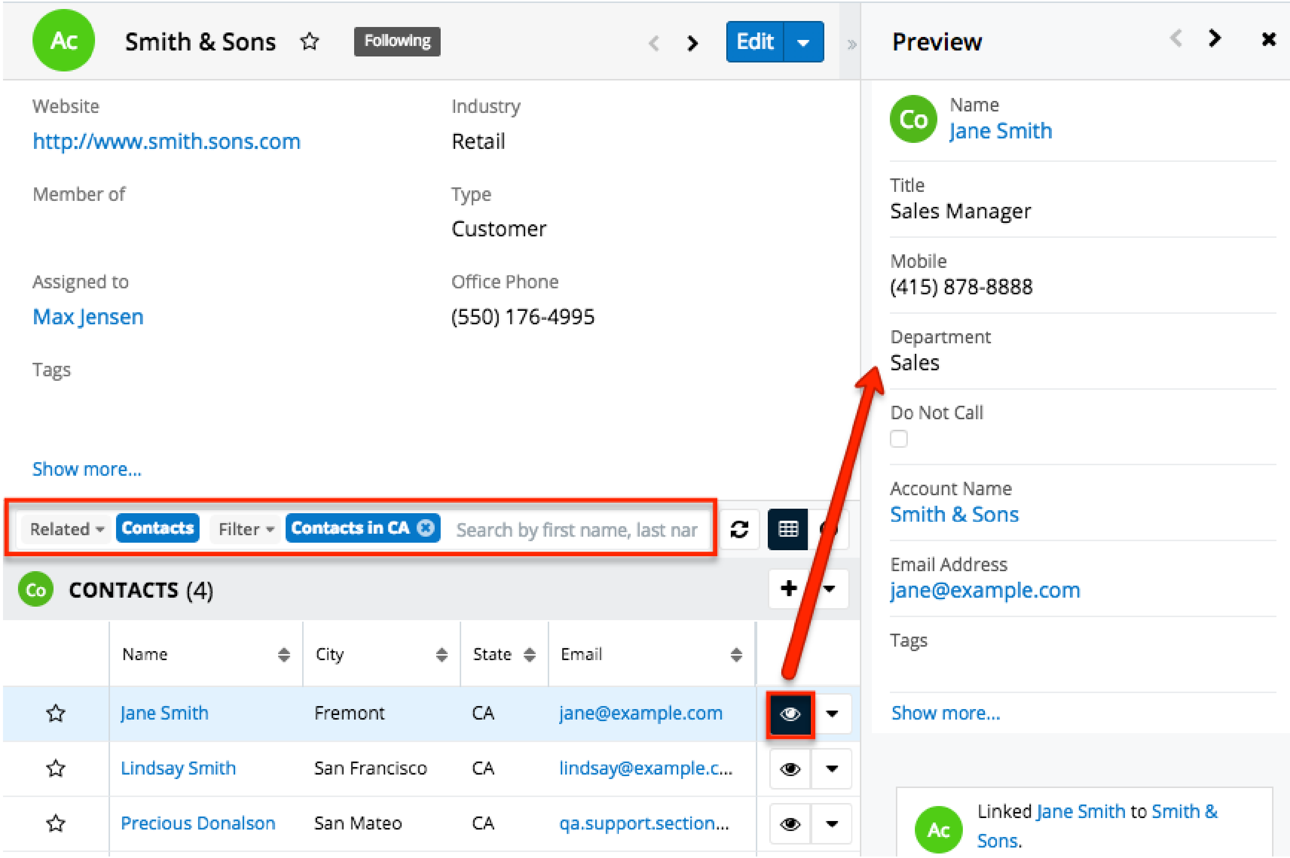
Activity Type Filter

The record view activity stream can be filtered to only display certain messages (e.g., Messages for Create, Messages for Update) by clicking "Filter" above the post input box then selecting the desired message type. This enables users to filter the activity stream to only display specific activity type's they wish to view. To view all posts in the activity stream, simply select the All Activity Stream option in the Filter list.



Preview

Once the subpanel view displays the search results, users can easily view the related record's details directly from the record view by clicking the Preview button to the far right of the record's row. The record's detail will display in the intelligence pane to the right of the record view and provide users with key information regarding the record as well as the related activity stream information. For more information on viewing previews, please refer to the [Previews](#) section of the User Interface documentation.



List View Search (Legacy Modules)

Modules using the Legacy user interface 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, list view 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 list view searches, please refer to the Wildcards section.

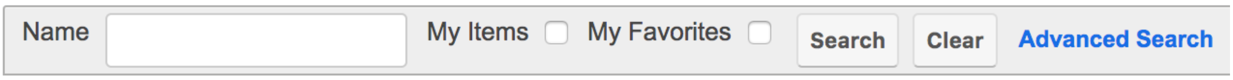
Basic Search

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 documentation 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

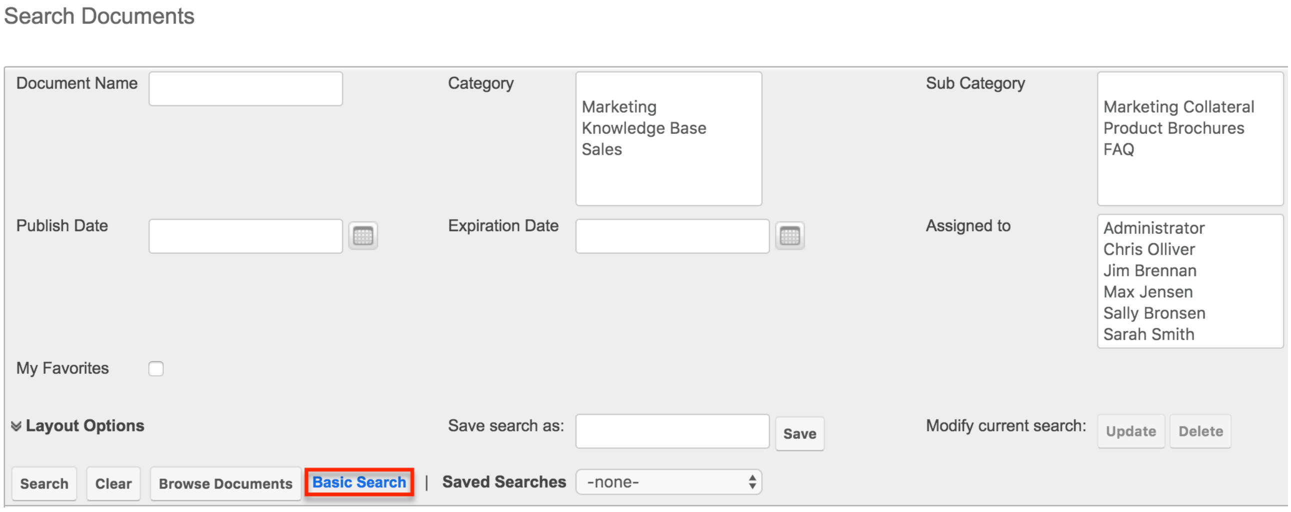
Advanced search offers a more in-depth search experience than Basic Search including additional fields, layout options, and saved search capability. The search fields are context-sensitive and will vary depending on the module you are searching. From the Advanced search panel, you can click "Basic Search"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

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

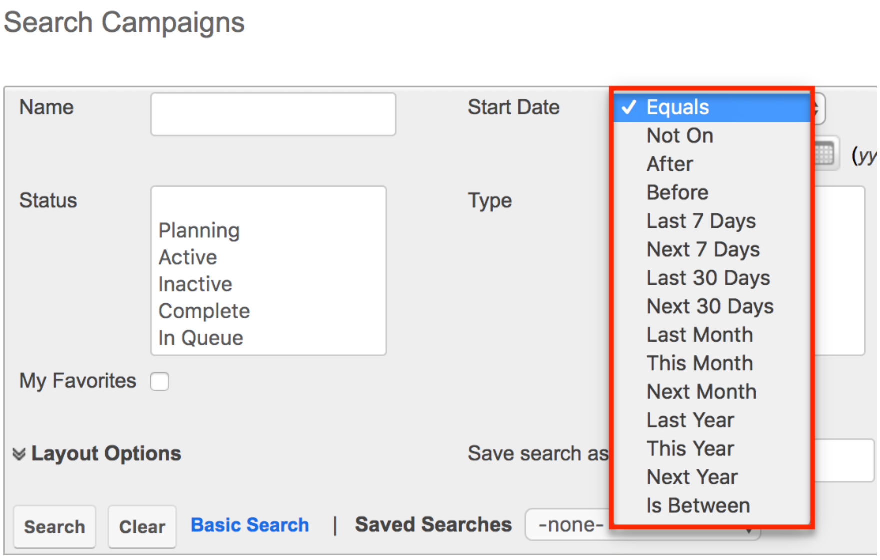
- **Search**: Click the Search button or press your Return/Enter key to perform the search.
- **Clear**: Click the Clear button to clear all criteria from the searchable fields.
- **My Favorites**: Select this box to return only records you have marked as favorites.
- **Layout Options**: Use the expandable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

your list view. For more information, please refer to the [Layout Options](#) section.
- **Saved Searches**: Save, recall, update, and delete searches that you use often. For more information, please refer to the [Saved Search](#) section.

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), one (e.g., Equals, Not On), 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, Does Not Equal) 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 disable range searches on a field, please refer to the [Studio](#) documentation in the Administration Guide.

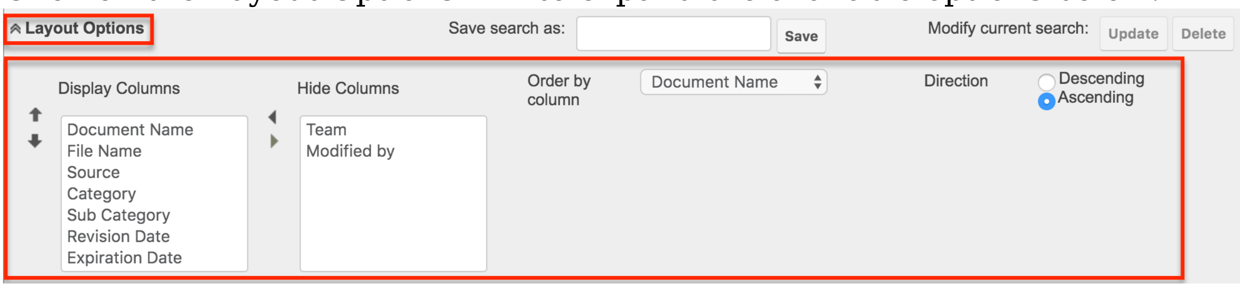
When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter a record name to search, Sugar will only return records with a matching name that you have marked as favorites. When searching 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 documentation 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.

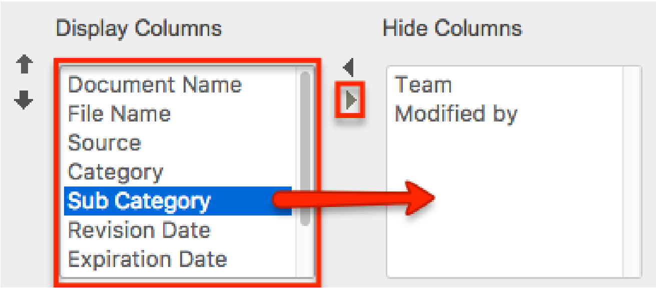
Layout Options

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.

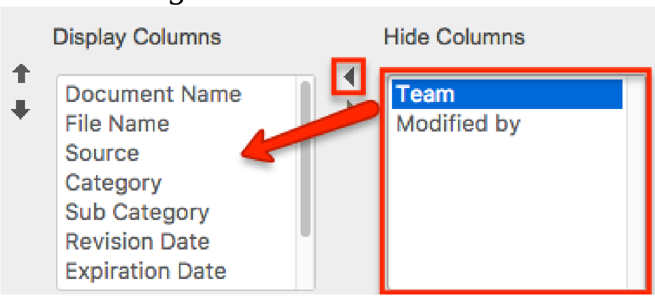
Use the following steps to personalize the list view for a module using the layout options in advanced search:

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


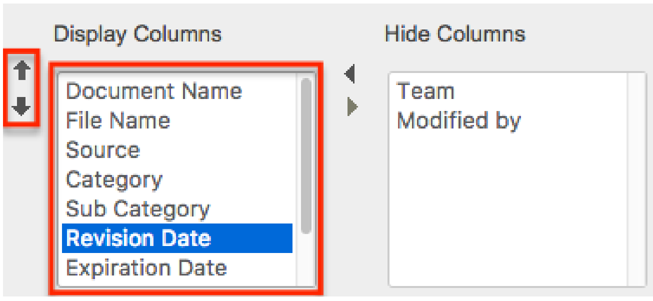
2. Select any column name in the Display Columns panel and click the right aligned arrow to remove the column from the list view.



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.

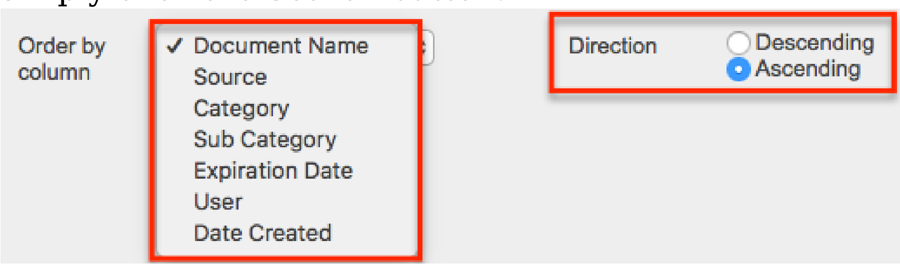


4. Select any column name in the Display Columns panel and click the up or down aligned arrow to move a column left or right respectively in the list view.

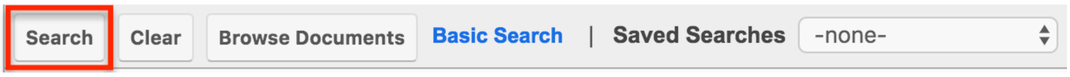


5. In the Order By column dropdown, select a field to order your results by. Only columns in the Display panel will be available to order by and some columns (e.g., Email Address) are not available for sorting.
6. Select whether to order the fields by Ascending (i.e., 1-10, A-Z) or Descending (i.e.,10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

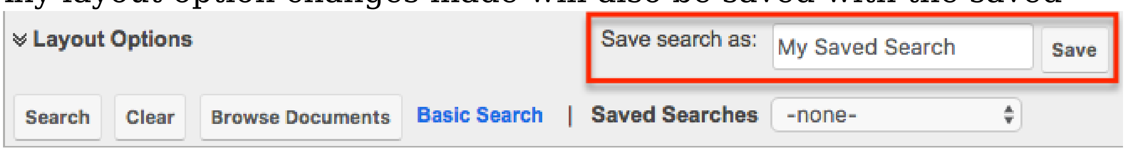
Sugar gives users the ability to save any layout option changes and search criteria for easy access to perform the same search at a later time. A common example of this would be a manager saving a search where only his or her employees are the Assigned Users on the record. This way, the manager can review 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 advanced search:

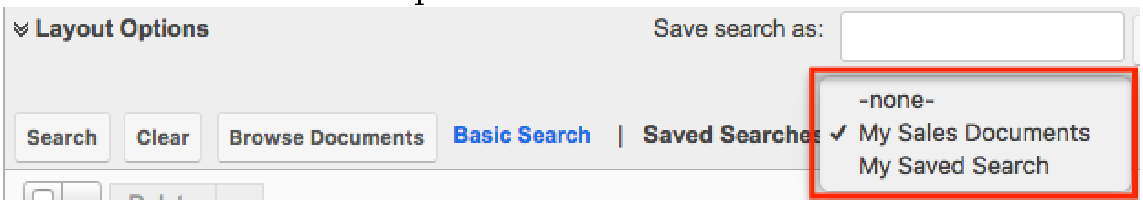
1. Enter any number of search criteria you desire.
2. Enter a descriptive title for the search in the "Save search as" textbox and click "Save".

   Note: Any layout option changes made will also be saved with the saved search.

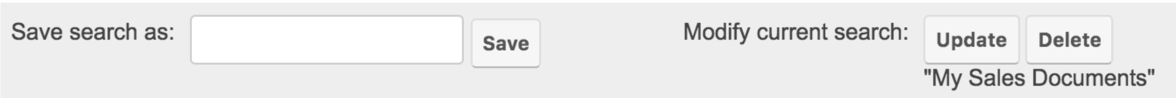


3. The search is saved and executed. You now have the ability to modify any search criteria or layout options. After any necessary modifications are made click the Update button next to "Modify current search".

   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

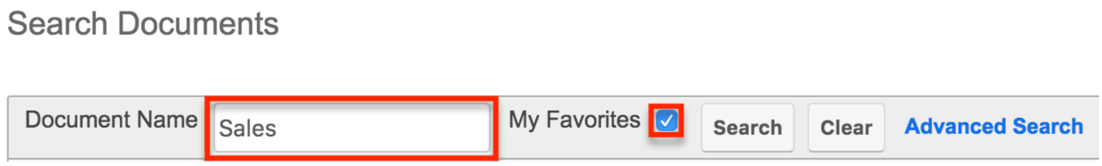
When performing searches in the Basic or Advanced search panels, Sugar uses the "and" operator, not "or". This means that if you are searching against multiple fields, Sugar will place an "and" in-between each search field returning only records matching all of your search criteria. For example, a search performed for a record name containing "Sales" and the My Favorites checkbox enabled will only return records where the record name contains "sales" and is marked as a favorite.

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 Documents module for the Category field will allow you to select multiple options to search by.

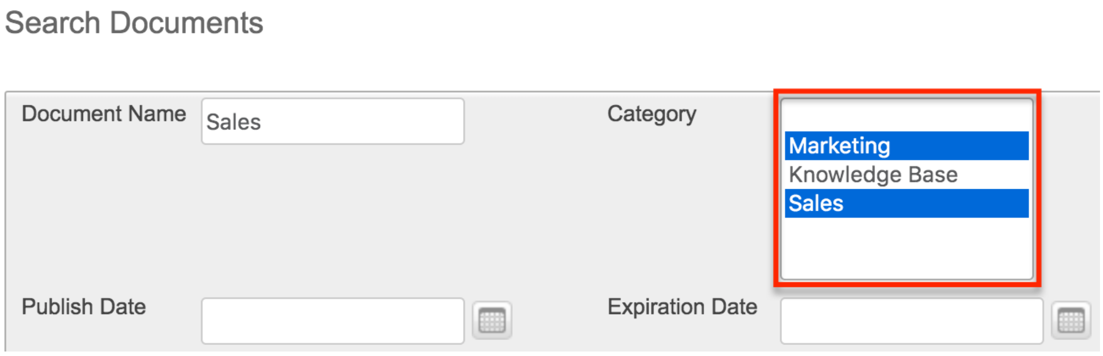
Performing a search on the Category field with "Marketing" and "Sales" selected will return any records where the document's category is defined as "Marketing" or "Sales".

If any other field is added into the search criteria the operators between the Category field and any other field will remain an "and" operator.

Basic Search:



Advanced Search:



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. Search operators can be combined for queries, but if quotation marks and wildcard characters are used together, the quotation marks will supersede the wildcard, resulting in a search for an exact match. The following wildcard characters can be used in the related module filters in Sugar:

Character	**Wildcard Use**
%	Use this wildcard to match any number of characters, including zero
_	Use this wildcard to match a single character

Please note that a wildcard is implied at the end of all search queries. For example, searching for "Acme" will match account names like Acme Industries or Acme Funds. Insert a wildcard before your search query with a % sign (%Acme) to match account names that begin with or contain the query, such as "ABC Acme Industries". If performing a multiple-word search, the wildcard is only appended to the last word and not all words.

The following are example searches using wildcards in related record search:

Search Criteria	**Matches**	**Does Not Match**
rob	**Rob**, **Rob**ert, **Rob**in	Bob, Jacob
%bert	Al**bert**, **Bert**, Ro**bert**	Bart
r_b	**Rob**ert, **Rub**y	Bob, Raab
%s_i	Du**sti**n, Chri**sti**, **Smi**th	Sophie, Josephine
__it	**Nit**a, **Lit**trell	Schmitt
r_b% smit%	**Rob**ert **Smit**h, **RobSmit**e	Bob Smith, Robert Phillip
rob smit	**Rob Smit**h, **Rob Smit**e	John Smith

When performing a search, Sugar will try to match your search text to the beginning of a record's field. Therefore, if an account name starts with an article like "A" or "The", this must be accounted for in the search by adding a wildcard (%) at the beginning of your text. For example, to properly return an account named "The ABC Company", you should enter "%abc" for Sugar to find a match in the system.

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.

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 legacy searches. 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 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 the Studio documentation in the Administration Guide.

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Tags

Overview

Tags are user-created keywords or phrases that can help users find, group, and classify large amounts of data by common attributes that may not already be defined via basic database fields. Sugar stores tags as individual records in the Tags module. Modules (e.g., Accounts, Contacts, etc.) using the Sidecar user interface contain a Tags field where users can create and share tags that can be used to identify records in filters, dashlets, and reports.

Users can easily create tags from any tags-enabled module's (e.g., Contact's) record view. Once the tag is created, it may then be related to other Sugar records such as meetings, cases, opportunities, and many others. One Sugar record can have multiple tags. This documentation will cover how users can create new tags and use existing tags by interacting with the system-wide tag repository.

While tags can be created and used by regular Sugar users, some actions in the Tags module are only available to administrators and users with developer-level role access. This documentation will cover the actions available to all users. For information about tag administration options that allow you to manage the system-wide tag repository, please refer to the [Tag Management] documentation in the Administration Guide. For instructions concerning views and actions which are common across most Sugar modules, please refer to the [Working With Sugar Modules] section of this page.

Unlike other Sugar modules, users can see all tag records regardless of their team membership, but visibility may be affected by user access and assigned roles. For more information on access types and roles, please refer to the [Role Management] documentation in the Administration guide.

Understanding Tag Behavior

The act of relating a tag to a Sugar record is referred to as "tagging". A user can tag any Sidecar module record in Sugar via the Tags field. Please refer to the [User Interface] documentation for a list of Sidecar modules. If you do not see the Tags field but expect that you should, reach out to your system administrator to discuss tag visibility and access settings for your user.

Use cases for effective tagging include:

Use Case	**Example Tags**
Classifying high-value or urgent business	Tags: top 20, hot!, Platinum Client
Connecting specific events and activities with clients	Tags: SugarCon 2015 Visitor, tradeshow attendee, exhibitor
Assigning role-based attributes	Tags: influencer, champion, gatekeeper, decision maker
Noting interest-based and demographic classifications	Tags: urban, baby boomer, gardening, scuba diving

When working with tags in Sugar, keep in mind the following rules of tag behavior:

- Tags may be a single word or a short phrase.
- Differentiate between single-word tags and multi-word phrases by using a comma between tags.
- Inserting a space character will result in a single, multi-word tag.
- Tags are not case-sensitive, but take care to prevent unintentional

duplicates due to misspellings or unnecessary punctuation.
- Tags are shared by every user in an instance and across all tags-enabled modules. When you create and save a new tag, all users will immediately be able to use that tag regardless of team restrictions.

Clicking on Tags

Clicking on a tag in Sugar may take you to the tag's record view or to the global search's View All Results page, depending on where you are in the application when you click the tag. If you click on a tag that links to its own record view, the Sugar records related to the tag will be visible, grouped by module, in the tag's related-record subpanels.

Note: Users cannot remove the tag-to-record relationship via a tag's related-record subpanels. To remove a tag relationship, edit the tagged record's Tags field as explained in the Tagging via Record View section of this page.

For more information on viewing a tag record's related-record subpanels, please refer to the User Interface page. If a tag links to the global search's View All Results page, you will see the records related to the tag in search-result form. For more information on navigating and viewing global search's View All Results page, please refer to the Search documentation.

When clicking on a tag to view related records, only modules (e.g., Accounts, Contacts) that are enabled for global search will appear in the View All Results page. Please note that the Reports module is not enabled for global search.

Note: When viewing related records via the tag's record view or global search's View All Results page, please keep in mind that you will only be able to see records as allowed by your team membership, user access, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration Guide.

The following table summarizes what you can expect when clicking on a tag from various locations in Sugar:

Tag Location	**Tag Format**	**Tag Appearance**	**Result**
Tags List View	Hyperlink	SugarCon 2016 Visitor	Opens the tag's record view
Report Results	Hyperlink	SugarCon 2016 Visitor	
My Tags Dashlet	Hyperlink	SugarCon 2016 Visitor	
Related Module List View Dashlet	Hyperlink	SugarCon 2016 Vi...	Opens global search View All

Related Module List View	Hyperlink	SugarCon 2016 Visitor	Results page
Related Module Record View	Pill	SugarCon 2016 Visitor	
Intelligence Pane (Preview)	Pill	SugarCon 2016 Visitor	
Subpanel List View	Hyperlink	SugarCon 2016 Visitor	
Global Search Bar	Tag Ribbon	SugarCon 2016 Visitor	Adds the tag as a Global Search filter

Note: When editing a record, the tag pills displayed in the Tags field are not clickable.

Tag Fields

The Tags 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.

Field	**Description**
Name	The name or designation of the tag.
Assigned To	The Sugar user assigned to the tag record.
Date Created	The date the tag record was created.
Date Modified	The date the tag record was last modified.
Description	A description or other information about the tag.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field. **Note**: This field is not visible in the user interface.

Creating Tags

Regular users can create new tags by tagging records via the Tags field, mass update, and import within Sugar Sidecar modules. Users with administrator or developer access can create Tag records in various ways directly via the Tags module. Please note that when a new tag is created and saved, all users will immediately be able to use that tag in any Sidecar module regardless of team restrictions.

Creating via Tags Field

All users can create new tags on the fly from the Tags field in any Sidecar module (Accounts, Contacts, etc.). This will automatically create a relationship between the record and the tag. Simply enter the name of the tag (e.g., skiing) in the Tags field to create the new tag record. Please note that the other fields (e.g., Assigned To, Date Created, etc.) in the Tags record view will automatically populate by default. For more information on creating tags via record view, please refer to the Tagging via Record View section of this documentation.

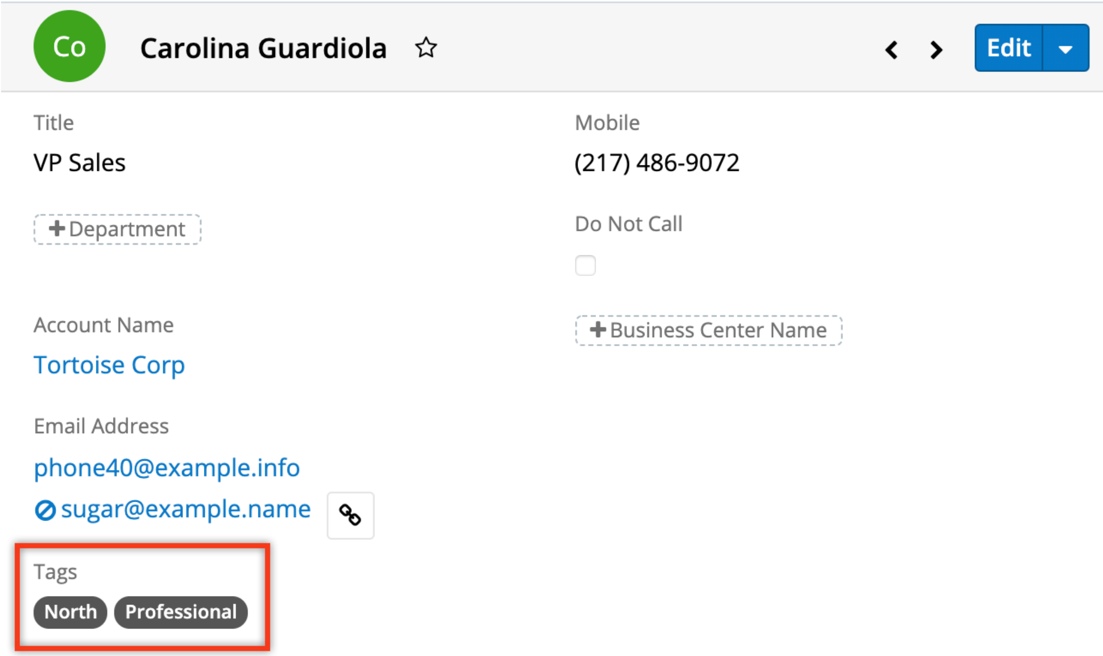
Note: Users will be able to edit the Tags field to create new tags regardless of any role restrictions the user has for the Tags module.

Creating via Tags Module

Another way to create tags is by using the Create Tag option in the Tags module. Only users with administrator or developer access to the Tags module will see the Create Tag option and Create button. For more information on creating tags via the Tags module, please refer to the Tag Management documentation in the Administration Guide.

Tagging Records

Users can tag any record that contains a Tags field. By default, every Sidecar module (Accounts, Contacts, etc.) will contain the Tags field on its record view. When you create and save a new tag on any Sugar record, all users will immediately be able to use that tag in any tags-enabled module regardless of team restrictions. Please note that users will be able to edit the Tags field to add existing tags or create new tags regardless of any role restrictions the user has for the Tags module.



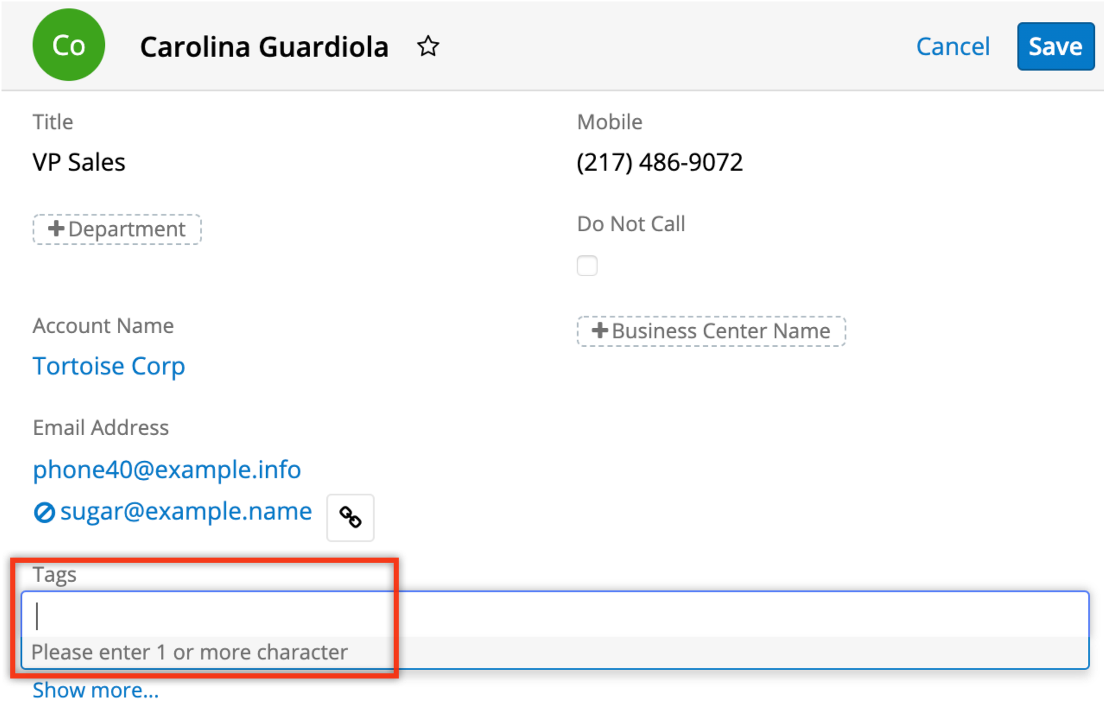
Only administrator and developer users can merge, delete, or update records within the Tags module. To assign a tag management role to a Sugar User, please refer to the Creating a Tags Administrator section of the Tag Management page in the Administration Guide.

Tagging via Record View

Tagging a record will automatically create a relationship between that record and the tag. Simply type the name of the tag into the Tags field and then click "Save" to tag a record. If the tag does not already exist, the tag will automatically be created including setting the Date Created field and assigning the tag to you. For more information on available Tag fields, please refer to the Tag Fields section of this documentation.

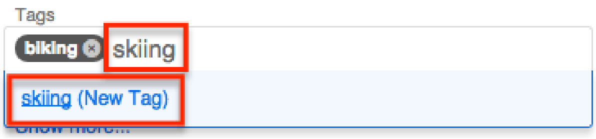
Follow these steps to tag an account record as an example:

1. Navigate to an account's record view.
2. Click the Edit button on the upper right of the page or click inside the Tags field.



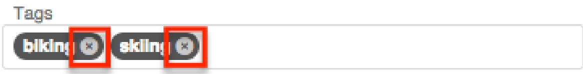
3. Type the word or phrase that you would like to use as a tag. When you enter the first letter of a tag, Sugar will begin to display recommended tags that begin with the same letter.
    - To choose an existing tag, select it from the list of recommended tags by clicking on the appropriate menu option.

    - To ignore the recommendations and create an entirely new tag, completely type out the word or phrase and then click on the New Tag menu option. Alternatively, use a comma or the Enter key to indicate the end of a tag. Take care not to create duplicate or synonymous tags unintentionally. Please note that new tags will not be saved to the database until you save the record that contains the new tag.



    - To remove a tag or tags from a record, click the "x" on the tag to remove it from the Tags field and then save the current record.

Alternatively, place the mouse cursor to the right of the tag and use the keyboard's backspace to highlight it. Press the backspace key again to remove the highlighted tag from the Tags field. Please note that removing an existing tag from a record will not remove it from the database; the tag will still exist, but it will no longer be related to this particular record.



4. Once you have entered the desired tag or tags, click the record's Save button to commit the changes to the record and save any new tags to the database.

If the saved record contains any new tags, those tags will be saved as new records in the Tags module. Users can now find the newly created tag when adding tags to any tags-enabled module record, and may also search and browse the list of available tags via the Tags module list view.

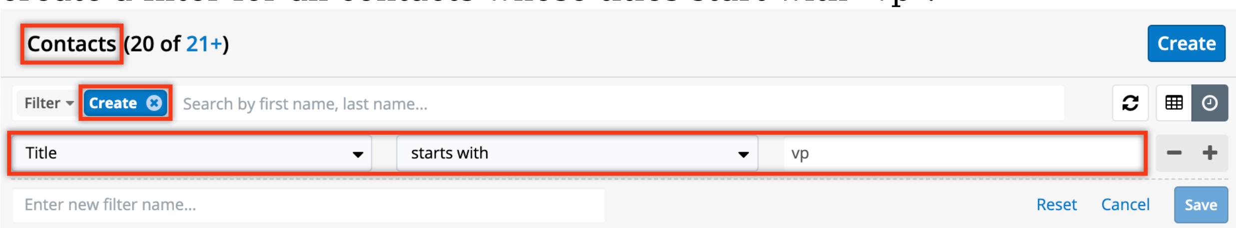
Tagging via Mass Update

Users can also use the mass update function on a tags-enabled module to tag many records at one time. Mass update provides the following conveniences:

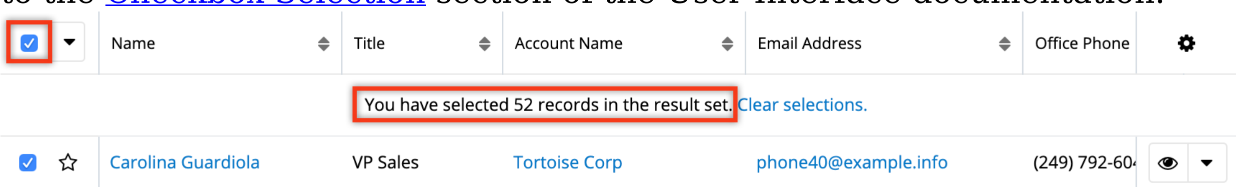
- Add one or many tags to a group of records
- Use any combination of new and existing tags
- Replace existing tags or append additional tags to existing tag lists

Follow these steps to tag multiple contact records via mass update as an example:

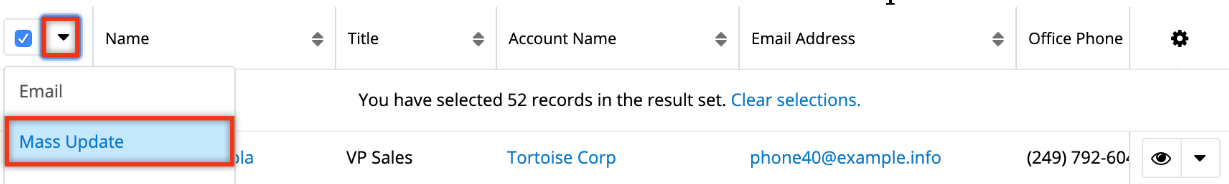
1. Navigate to the Contacts list view.
2. Filter or search for the set of records you would like to tag. For example, create a filter for all contacts whose titles start with "vp".



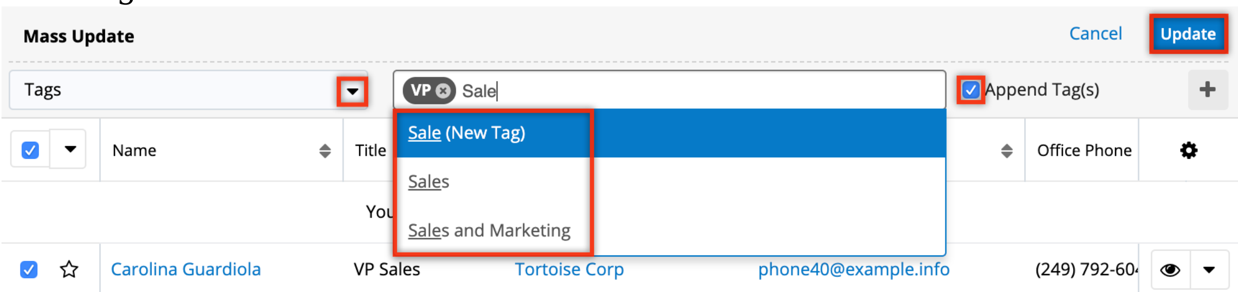
3. Select all results or select the checkboxes next to the appropriate records. For more information about selecting multiple records at once, please refer to the Checkbox Selection section of the User Interface documentation.



4. Click on the list view Actions menu and select "Mass Update".

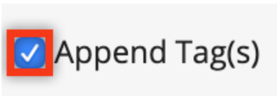


5. In the mass update bar, choose the Tags field and begin typing the phrases you would like to use as tags one at a time in the empty text box. When you enter the first letter of a tag, Sugar will begin to display recommended tags that begin with the same letter.

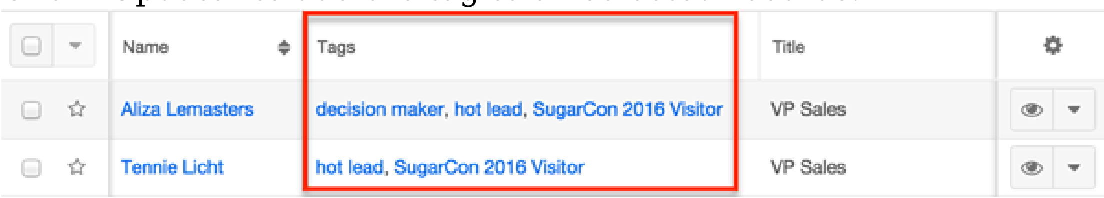


6. Click on the tag suggestion to add the pill to the mass-update text box, or click the New Tag suggestion to create a new tag. Alternatively, press enter or the comma key. Continue adding tags if desired. For more information on tagging records, please refer to the Tagging via Record View section of this documentation.

7. Decide if you would like to replace the existing tags on the selected records or if you prefer to append the specified tags to the records without removing their existing tags. By default, the Append Tag(s) checkbox is selected so that Sugar will not remove existing tags. Deselect this option to overwrite all existing data in the Tags field of the selected records.



8. Click "Update" to add the tag to all selected records.



Tagging via Import

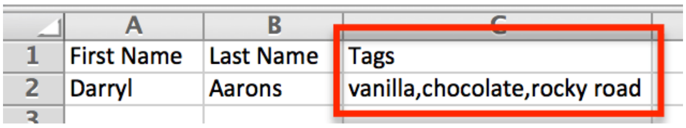
Users can tag new or existing Sugar records by including the Tags field as a column in an import file. For more information on tagging via import, please refer to the Importing Fields With Multiple Values section of the Import documentation.

Please note that importing an update to the Tags field of a record that already exists in Sugar will erase any previous tags on the record and replace them with the imported tags. For more information on importing tags to existing records, please refer to Importing Multiselect Fields to Existing Records in the Import documentation.

Formatting Tag Imports

Tags are not case sensitive, but they must be entered as an exact character match in the import file when adding existing tags to records in order to prevent creating duplicate variations of the same tag. For example, if there is an existing tag named "rocky road" in Sugar, importing the tag "ROCKY ROAD" as all uppercase will successfully find and relate the existing tag. However, if the import file contains "rocky-road" with a hyphen, an unintentional synonymous tag will be created.

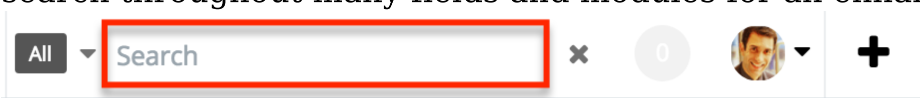
When importing tags to related module records (e.g., contacts), multiple tags being added to one record should be separated with a comma. For example, to create or update a contact record tagged as both "vanilla" and "chocolate", the import data file's Tags column should contain vanilla,chocolate with a comma separating the tags and no extra spaces between the tags. If one of the imported tags is a multi-word phrase, such as "rocky road", then the imported data field should contain a space character only within that tag value: vanilla,chocolate,rocky road.



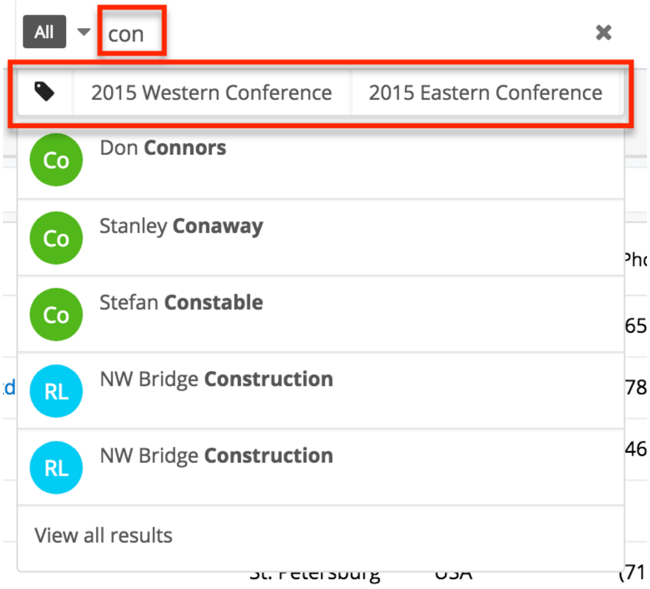
For more information on importing records with the Tags field, please refer to the Import documentation in the Application Guide.

Using Tags in Global Search

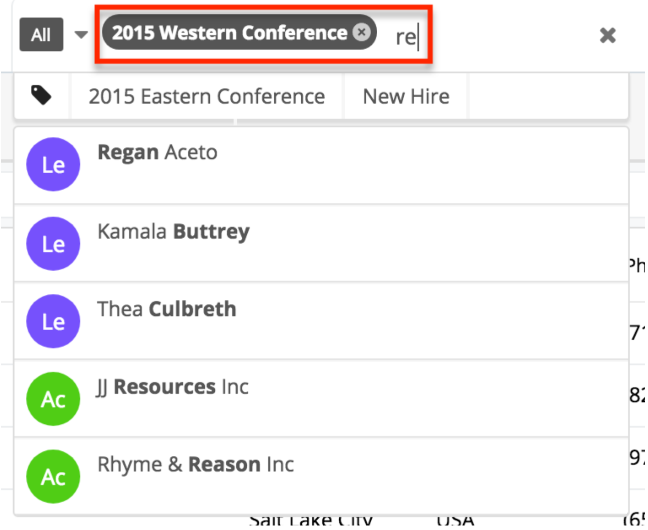
Global Search allows users to search for information across their entire Sugar database as opposed to restricting results to a specific module. The Global Search bar displays on the upper right of every Sugar page and utilizes full-text search to search throughout many fields and modules for an enhanced search experience.



Users can locate and select tags as global search filters to easily locate groups of records that are tagged by common attributes. For example, if you have a set of leads that were acquired from a specific conference (e.g., 2015 Western Conference) and you wish to locate all the lead records tagged with this value, you can perform a search using the tag value. As you type the tag's name, a list of matching tags will appear in the tag ribbon beneath the search box and display up to five matching tags.



Click on the desired tag to apply it as a filter for the Global Search results. You can append additional search terms or tags in the search box to further narrow your search. Simply enter the keyword to the right of the current criteria and the matching result(s) will display below.



If you search using multiple tags, the system will look for records that match any one of the tags in the search box using the "or" operator. For more information on using Global Search, please refer to the Search documentation.

Managing Tags

When working with tags, common data management tasks such as editing, merging, and deleting are restricted to administrator users and users with administrator- or developer-role access to the Tags module. For more information on these administrative options, please refer to the Tag Management documentation in the Administration Guide.

Tags can be created, added to records, and removed from records without visiting the Tags module by performing those actions directly in a Sugar record. Regular users need only access the Tags module to view tags and their related records in list view and record view. The Tags module offers tag administrators additional functionality that is covered in the Tag Management page of the Administration Guide.

Working With Sugar Modules

The Tags module uses Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

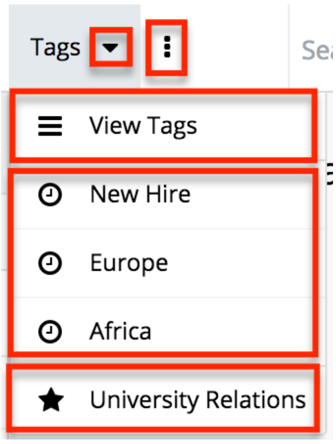
Tag Menus

The following sections describe the various menu options in the Tags module with links to more information about each option in the User Interface documentation or, for tag-specific functionality, within this page.

Module Tab Menus

The Tags module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar at the top of any Sugar screen. The additional modules will appear on the list and you can click "Tags" to access the list view.

Once the Tags module tab displays on the navigation bar, click the triangle within 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 tags you last viewed in the module. The Favorites menu displays the list of tags you most recently marked as favorites in the module. For information about favoriting records in Sugar, please refer to the User Interface documentation.



The Actions menu allows you to perform the following operation:

Menu Item	Description
View Tags	Opens the list view layout to search and display tags.

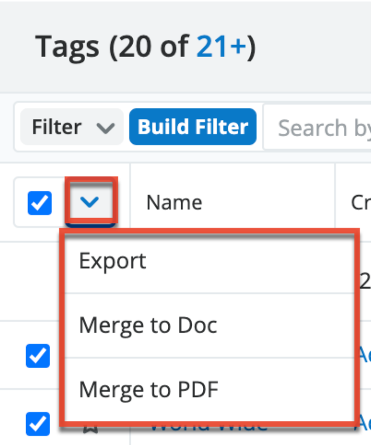
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Tags list view displays all tag records and allows for searching and filtering to locate specific tags. You can view the basic details of each record within the field columns of the list view or click a tag's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual call records, or click the checkbox in the list header to select all records displayed on the current set of list view results.

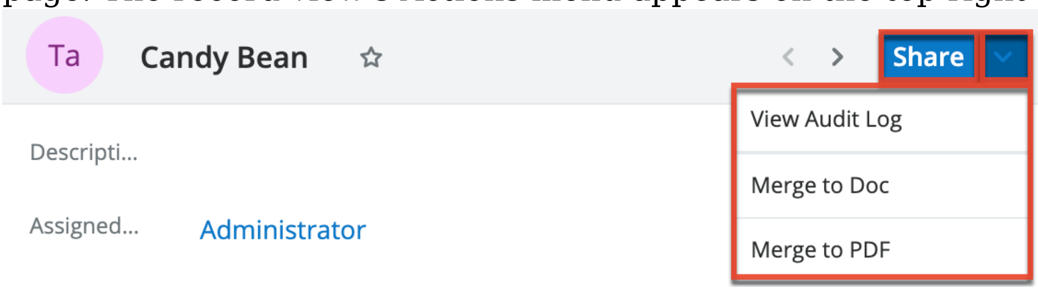


The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Export	Export one or more calls to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The tag's record view displays the fields relevant to the Tags module. To access a tag's record view, refer to the table within the Clicking on Tags section of this page. The record view's Actions menu appears on the top right of the record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Share	Share a link to this tag in Sugar via email.
View Audit Log	View a record of changes to this tag's audited fields.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules.

Content Link	Description
Viewing Tags Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Dashlets Viewing via Reports	There are various options available for viewing tag records in Sugar including via Tags list view, Tags record view, Tags Recently Viewed menu, dashlets, and reports. Unlike other Sugar modules, users can see all tag records regardless of their team membership, but visibility may be affected by user access and assigned roles. For more information on access types and roles, please refer to the Role Management documentation in the Administration guide.
Searching for Tags List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to searching for tag records via list view search, which searches and filters within the Tags module. Tags can also be used to narrow global search results for records in other modules. For more information,

	please refer to the Using Tags in Global Search section of this page.
Tags List View Total Record Count List View Search Checkbox Selection Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview More Tags Dashboards	The List View section walks through the many elements of the Tags List View layout, which contains a filterable list of all tag records in Sugar.
Tags Record View Favorite Designation Next or Previous Record Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Dashboards	The Record View section walks through the many elements of the Tags Record View layout, which contains detailed information about a single tag record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Tags record view are described in the Record View Actions Menu section of this page.
Exporting Tags	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of tags and all their data as a .csv file for use outside of Sugar (e.g., in Microsoft Excel).
Viewing Tag Audit Logs	The Viewing Record Audit Logs section describes the View Audit Log record view option which displays a history of changes to the tag's audited fields. **Note**: Only the Assigned User Id field is audited for the Tags module and will, therefore, be the only field displayed in the audit log.
Favoriting Tags Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking tags as favorites, including via the Tags list view and Tags record view. Favoriting a tag allows you to easily

	access it from list views, dashlets, or the Tags module tab.
Sharing Tags	The Sharing Records section provides instructions for the Share record view option, which composes an email with a link to the tag record. If the recipient is logged into Sugar, clicking the link will bring them directly to the tag's record view.

Last Modified: 2021-12-21 01:05:50

Calendar

Overview

Sugar's Sidecar Calendar module allows users to easily schedule, view, and manage events like your calls, meetings, and other important Sugar occasions in one place. The calendar lets you show event milestones from Sugar that are not traditionally considered "activities", such as the expected close dates for your cases or opportunities. When creating a new calendar, you can decide what conditions must be met to have the event appear on your calendar. You can also view other users' and teams' scheduled events via the User and Team Calendars. This documentation will cover how to use the Calendar module as well as the various actions and options available from within the module. For information on using Sugar's legacy ("BWC") calendar, refer to the Help Article.

Suggested Settings

We recommend making the following admin configurations to your Sugar instance to optimize the user experience. Most customers will want users to be able to access each other's calendars (team permitting), but only edit or delete their own calendars.

Note: You must be a system administrator to complete the following configurations.

To create a role that restricts calendar users from editing or deleting other users' calendars, create a new role via Admin > Role Management with the following settings:

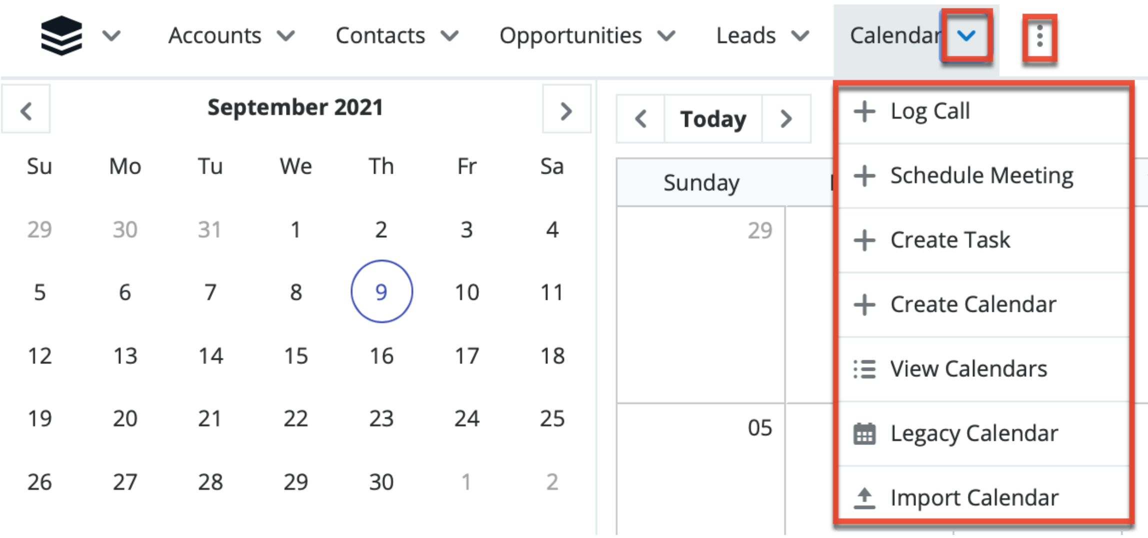
- **Role Name**: Calendar Users
- **Module Permissions**: For the Calendar module, set the following permissions so that users can see each other's calendars (team permitting) but only edit or delete their own:
    - **Access**: Enabled
    - **Access Type**: Normal
    - **Delete**: Owner
    - **Edit**: Owner
    - **List**: All
    - **Record View**: All

After saving the new role, scroll to the role's Users subpanel and add all users who will have access to the Calendar module. By default, all users will have access to Calendar unless they have been restricted by a role. For more information on configuring roles in Sugar, refer to the Role Management documentation in the Administration Guide.

Calendar Module Tab

The Calendar module tab is typically shown as a tab in your navigation bar. If you do not see the Calendar tab, click the three-dots overflow menu on the right side of the navigation bar. If you do not see Calendar in your navigation bar or overflow menu, visit your user profile settings to enable the tab or contact your administrator to find out if it is disabled or hidden for your Sugar instance.

Unlike other modules where clicking the module tab displays the module's list view, clicking the Calendar module tab displays a calendar view. Clicking the triangle within the module tab will display an Actions menu with several options:



The Actions menu options will change depending on the calendars that you have created. You will see an option to create a new record in any module that you have established a calendar for. For example, if you have calendars for Meetings, Calls, and Tasks you will see the options to Schedule Meeting, Log Call, and Create Task. You will also see the following options by default:

Menu Item	Description
Create Calendar	Create a new calendar.
View Calendars	View the Calendar list view.
Legacy Calendar	Open the legacy Calendar module. This option is temporarily available and will be disabled in the future.
Import Calendar	Import a CSV file with Calendar data.

Calendar Actions

When viewing your calendar, there are several options across the top, side, and bottom 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 time period.

The options are defined as follows:

Option	Description
Date jumper	The Date jumper is the small, embedded

	calendar on the left side of the screen. Jump to a different date and remain in your day, work week, week, agenda, timeline, or scheduler view by clicking on a date in the Date jumper. If you are in month view and click on a date in the Date jumper, you will be taken to the day view for that date. Click the left and right arrows to scroll through months; or click the date written out along the bottom of the month to be taken to today's day, work week, week, agenda, timeline, or scheduler view, depending on your current view. If you are in month view, clicking the date along the bottom of the month will take you to today's day view. For more information, refer to the Viewing the Calendar section of this page.
Today	The Today button is located toward the top of the screen and lets you jump to today on the calendar. Click the left and right arrow buttons on either side of "Today" to move the calendar view backward or forward in time relative to today. For more information, refer to the Viewing the Calendar section of this page.
Date or date range	The date or date range is located toward the top of the screen to the right of the Today button. Click the date or date range to open a date picker from which you can select a new date or timeframe. For more information, refer to the Viewing the Calendar section of this page.
View selector	At the upper right of the calendar view, choose whether to view the calendar by Day, Work Week, Week, Month, Agenda, Timeline, or Scheduler. For more information on the available views, refer to the Calendar Views section of this page.
Users dropdown	To the right of the View selector, the

	Users dropdown shows a key that matches users with the colored stripes on the left side of the visible calendar events. This dropdown menu is populated only if visible calendar events include at least one internal user as a guest or owner.
Share	To the right of the Users dropdown, you can share the calendar by exporting as a PDF or iCal or publishing the calendar in iCal format. For more information, refer to the Sharing Calendars section of this page.
Define Calendar Day (gear icon)	The button with a gear icon in the top right opens the Define Calendar Day dialog box. Set the "Start of Day" and "End of Day" to define the hours you want to show for your day, week, work week, and timeline view.
Show full day	The "Show full day" button is located below the calendar view on the left. This button is available only when the day, work week, week, or timeline view is showing your defined Calendar Day hours. Clicking "Show full day" will expand the viewable hours beyond the Calendar Day that you define. Hours outside the workday are shaded blue.
Show Calendar Day	The "Show Calendar Day" button is located below the calendar view on the left. This button is available only when the full day is visible in day, work week, week, and timeline view. Clicking "Show Calendar Day" will collapse the viewable hours to the Calendar Day that you defined by clicking the gear icon above the calendar.

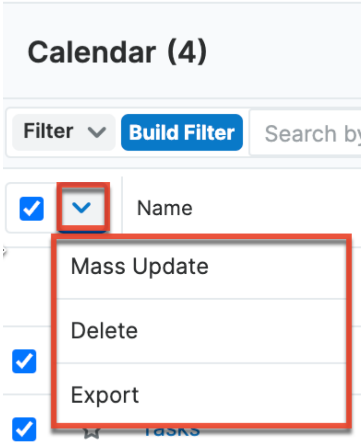
Calendar List View

List View Menus

The Calendar list view displays all calendars and allows for searching and filtering to locate specific calendars. You can see the basic details of each calendar within the field columns of the list view or click a calendar's name to open the record view to see the calendar configuration. To access the Calendar module's list view, click the triangle within the Calendar module tab to display the Actions menu and then select "View Calendars".

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual calendar records or click the checkbox in the list header to select all records displayed on the current set of list view results.

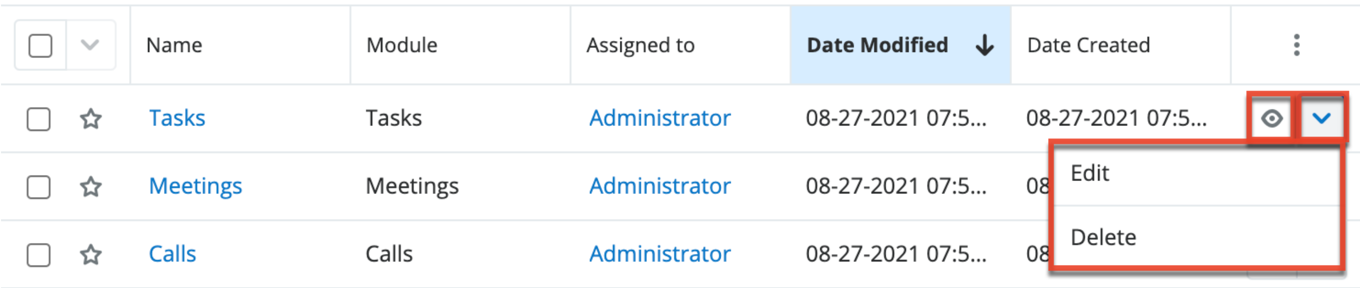


The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more calendar records at a time.
Delete	Delete one or more calendars at a time.
Export	Export one or more calendar records' fields to a CSV file.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual meeting directly from the list view.

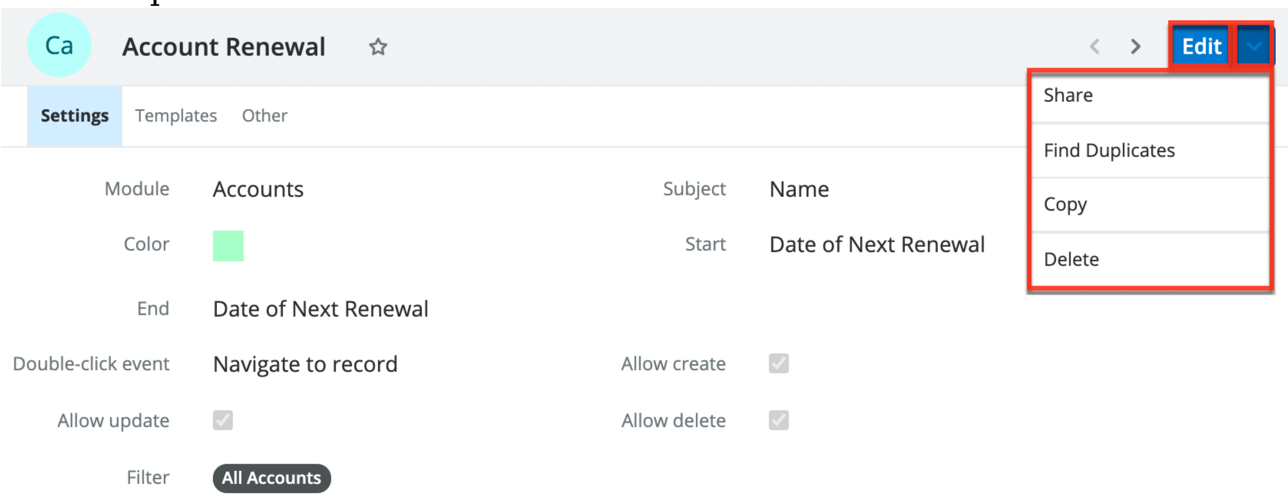


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this calendar in the intelligence pane.
Edit	Edit this calendar.
Delete	Delete this calendar.

Calendar Record View

The calendar record view displays the calendar's configurations as described in the Configuring Calendars section below. To access a calendar's record view, simply click a hyperlinked calendar name from the Calendar list view. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current calendar record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this calendar.
Share	Share a link to this calendar via email.
Copy	Duplicate this calendar.
Delete	Delete this calendar.

Configuring Calendars

You can use the Calendar module to set up calendars for many out-of-the-box or custom modules and configure the appearance of the calendar. You will only be able to see, create, and edit calendars as allowed by your team membership, user access type, and assigned roles. To view all calendars that you have access to, click the triangle in the Calendar module tab to open the Actions menu, then select "View Calendars".

Creating or Editing a Calendar

To create a new calendar, click the Create button in the top right of the Calendar list view or click the Create Calendar option in the Calendar module tab's Actions menu. To edit a calendar, click on the calendar name in the Calendar list view and then click on the Edit button. You can copy an existing calendar by clicking on the calendar name in the Calendar list view and then selecting "Copy" from the record view Actions menu.

Calendar Settings

The following table describes the field options available in the Settings tab of the calendar record's edit view:

Field	Description
Module	Choose the module that has the information to be shown on the calendar.
Subject	Select the field whose value will be used for the subject of the calendar event. The subject of the event is displayed as the first line in the calendar event's tooltip.

Color	Choose the color of the calendar events.
Start	Select the field whose value represents the start date for the event.
End	For all-day events, select the field that represents the end date for the event. Providing the Start and End date will make the event appear as an all-day event at the top of the calendar day. **Note**: If you provide the Duration minutes, Duration hours, and Duration days, you will not see the End field.
Duration minutes	For events that occur at a specific time (as opposed to all-day events), select the field to be used in the <Minutes> slot of the <Days>:<Hours>:<Minutes> duration. Providing a Start and duration will make the event appear during the appropriate hours on your calendar. [1]
Duration hours	For events that occur at a specific time (as opposed to all-day events), select the field to be used in the <Hours> slot of the <Days>:<Hours>:<Minutes> duration. Providing a Start and duration will make the event appear during the appropriate hours on your calendar. [1]
Duration days	For events that occur at a specific time (as opposed to all-day events), select the field to be used in the <Days> slot of the <Days>:<Hours>:<Minutes> duration, if any. Providing a Start and duration will make the event appear during the appropriate hours on your calendar. [1]
Double-click event	Configure the behavior that happens when you double-click an event in the calendar view. There are three types of options: • Navigate to record: Navigate to the record in the module chosen for the calendar in the same window. • Navigate to record in a new tab:

	Navigate to the record in the module chosen for the calendar in a new tab. • Open drawer for edit: Open a drawer to open and edit the record in the module chosen for the calendar. These options also exist for related modules. For all modules that are related one-to-one or one-to-many with the module chosen for the calendar, you will see additional options that include "(Related module name)" after the above three options. These options will direct you to the one record in the related module. For options that direct you to a related user profile (e.g., "Modified by"), the destination depends on your user type (i.e., administrators are directed to the Users module and regular users are directed to the Employees module).
Allow create	Choose whether to allow users to create an event/record for this module from the calendar view. Users will be allowed to create events/records as allowed by their team membership, user access type, and assigned roles.
Allow update	Choose whether to allow users to update an event/record for this module from the calendar view. Users will be allowed to create events/records as allowed by their team membership, user access type, and assigned roles.
Allow delete	Choose whether to allow users to delete an event/record for this module from the calendar view. Users will be allowed to delete events/records as allowed by their team membership, user access type, and assigned roles.
Filter	Filter which events appear on the calendar. See the User Interface documentation for more information. Some modules, like Calls and Meetings,

	contain filters that are unique for those modules.

[1] For more information, see the Understanding Duration Fields section below.

Understanding End and Duration Fields

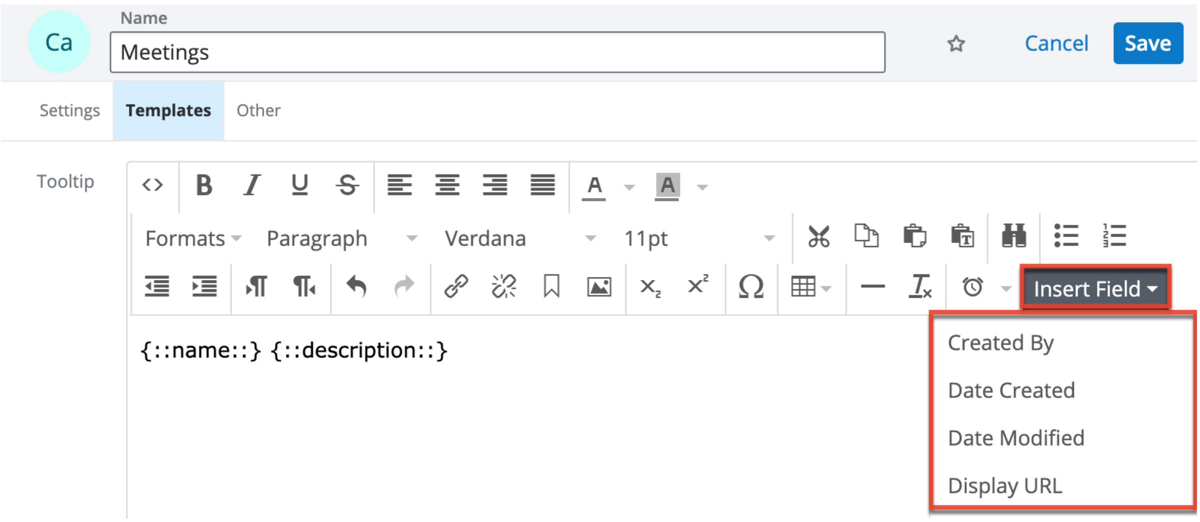
There are two ways to define an event's timeframe in the Calendar module: provide a start date and an end date or provide a start date/time and a duration. The former method (start and end dates) will display all-day events in every view since only the dates are known without times of day. The latter method (start date/time and duration) will display events on the calendar at the appropriate time slots in day, week, work week, and timeline views since the actual timespan for the events are known.

Some out-of-the-box modules, like Tasks, can only be configured using the start and end dates and will therefore only be visible as all-day events. Other modules, like Calls, can be configured in either way. By default, however, they use the start date and the duration time. You can change how these types of modules appear on your calendar by setting Duration minutes, Duration hours, and Duration days to the blank option and then select an option for the End field. If you provide the Duration minutes, Duration hours, or Duration days, you will not see the End field.

Note that not every module that contains a datetime field can be configured to be displayed using a start date and duration time. Datetime fields in some modules are handled differently within Sugar and, while many allow for displaying events with the start date and duration time, this is not universal.

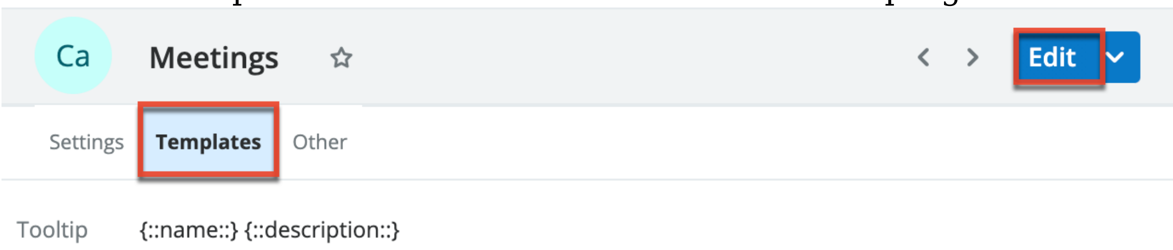
Calendar Templates

In the Templates tab of the calendar configuration window, you can establish what information you want to be shown in the tooltip, day view, week view, month view, agenda, timeline, scheduler, or iCal event. Click "Edit" in the top right corner to enable editing of all fields, or click the pencil icon next to a specific field to enable editing of that field. Use the Insert Field dropdown menu to choose placeholders that will be populated from information in your records.

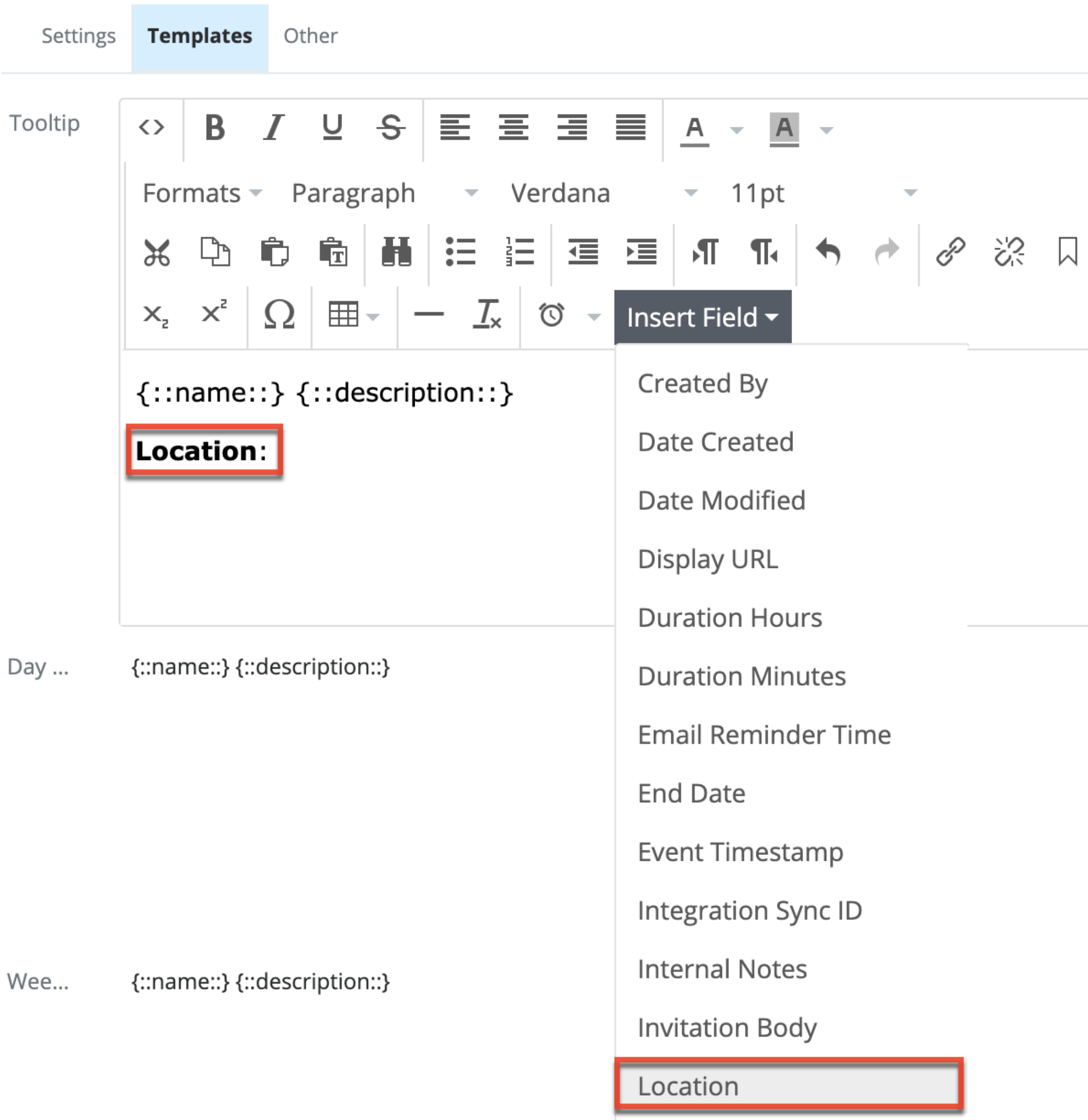


For example, if you want the tooltip for your meetings calendar to include the location of the meeting, you can use the following steps:

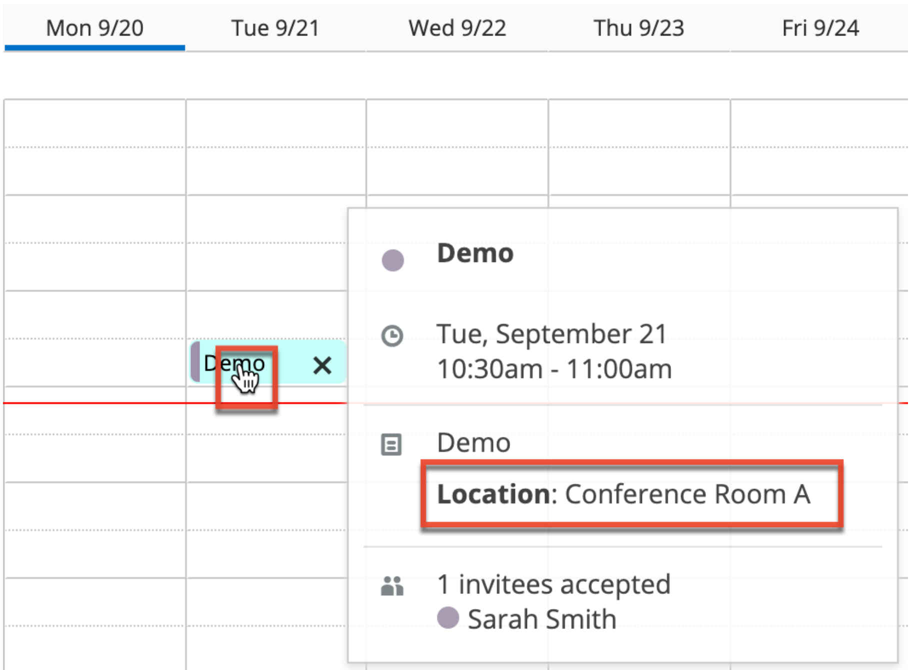
1. Click the triangle within the Calendar module tab to display the Actions menu and then select "View Calendars".
2. Select the Meetings calendar.
3. Go to the Templates tab and then click "Edit" in the top right corner.



4. Use the formatting toolbar to include any text that you want to be constant (e.g., Location:), then choose "Location" from the Insert Field dropdown menu.



5. Click "Save".
6. Click the Calendar module tab to be taken to the calendar view. Hover over an event and see that the location is now visible in the tooltip.



Other Calendar Fields

The following table describes the field options in the Other tab of the calendar configuration window:

Field	Description
Description	The description of the calendar.
Assigned to	The Sugar user that is assigned to the calendar.
Teams	The Sugar team(s) that is assigned to the calendar.
Date Modified	The date the calendar was last modified.
Date Created	The date the calendar was created.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.

Importing a Calendar

To import a calendar record, click the triangle within the Calendar module tab and select "Import Calendar". In the first step of the import, you can download a template CSV file. The template file contains instructions for how to format your data to import it to the calendar.

Creating Calendar Events

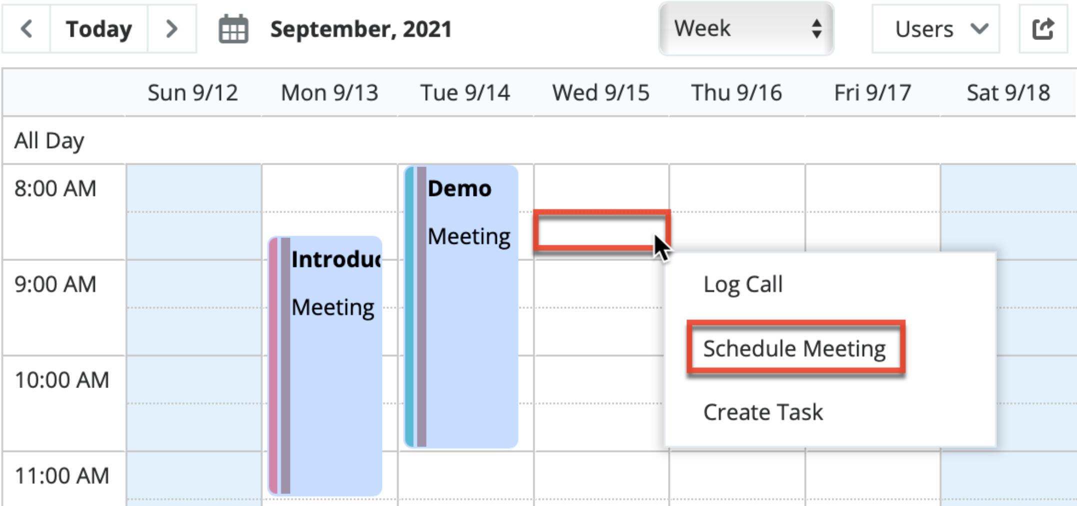
You create calendar events by creating a record in the module that the calendar represents. For example, if you have a calendar that shows your scheduled calls, you create a new event on your calls calendar by creating a new call record. You can create these records as usual (i.e., via the individual modules or the Quick Create menu) or via the Calendar module, as described below. For more information on creating records via Quick Create or modules, refer to the User Interface documentation or the specific module's page, respectively.

Creating Events via Calendar

The calendar allows you to easily create records for the modules that have configured calendars by clicking on the cell corresponding to the specific date (and time) you wish to attribute to the record. This option is available only if you have selected "Allow create" when creating the calendar and if you are allowed by your team membership, user access type, and assigned roles. The record view will appear in edit mode and the field that is mapped to the start date and time will automatically be populated based on the date and time cell you selected in the calendar.

Use the following steps to create a calendar event (e.g., meeting) via the calendar view:

1. Click the Calendar module tab. You can choose to view the calendar by Day, Work Week, Week, Month, Timeline, or Scheduler.
2. On the calendar view, double-click the cell corresponding to the date (and time, if applicable) you wish to schedule the meeting and choose "Schedule Meeting".



When "Schedule Meeting" is clicked, a Meeting record view will appear in edit mode.

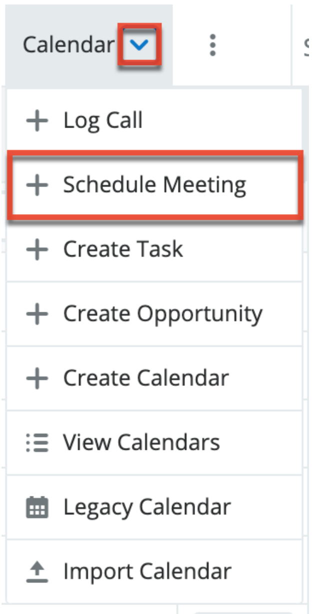
3. Refer to the Meetings documentation for additional instructions about creating meeting records.

Creating Events via Calendar Actions Menu

When you add a calendar for a module, the module's create option is added to the Calendar module's Actions menu. For example, if you add a calendar that uses the Meetings module, the Calendar module tab contains the Schedule Meeting option. This opens up the record view in edit mode for the corresponding module (e.g., Meetings) which allows you to enter all the relevant information for the calendar event.

The following steps cover creating a new meeting via the Calendar module tab as an example:

1. Click the triangle in the Calendar module tab to open the actions menu and select "Schedule Meeting".

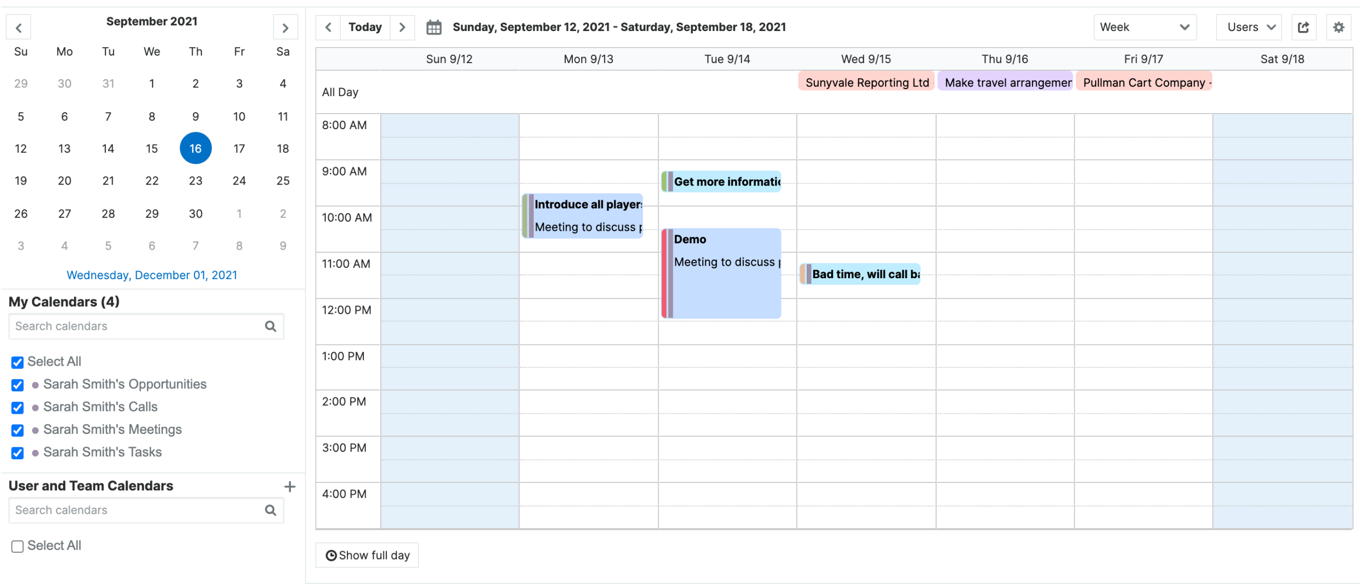


2. Refer to the Meetings documentation for additional instructions about creating meeting records.

Viewing the Calendar

The Calendar module allows users to schedule, view, and manage various events (e.g., Calls, Meetings, Tasks) in Sugar. The Calendar module can be accessed by clicking the Calendar module tab. Calendar events are color-coded by default to match the color of the parent module icon.

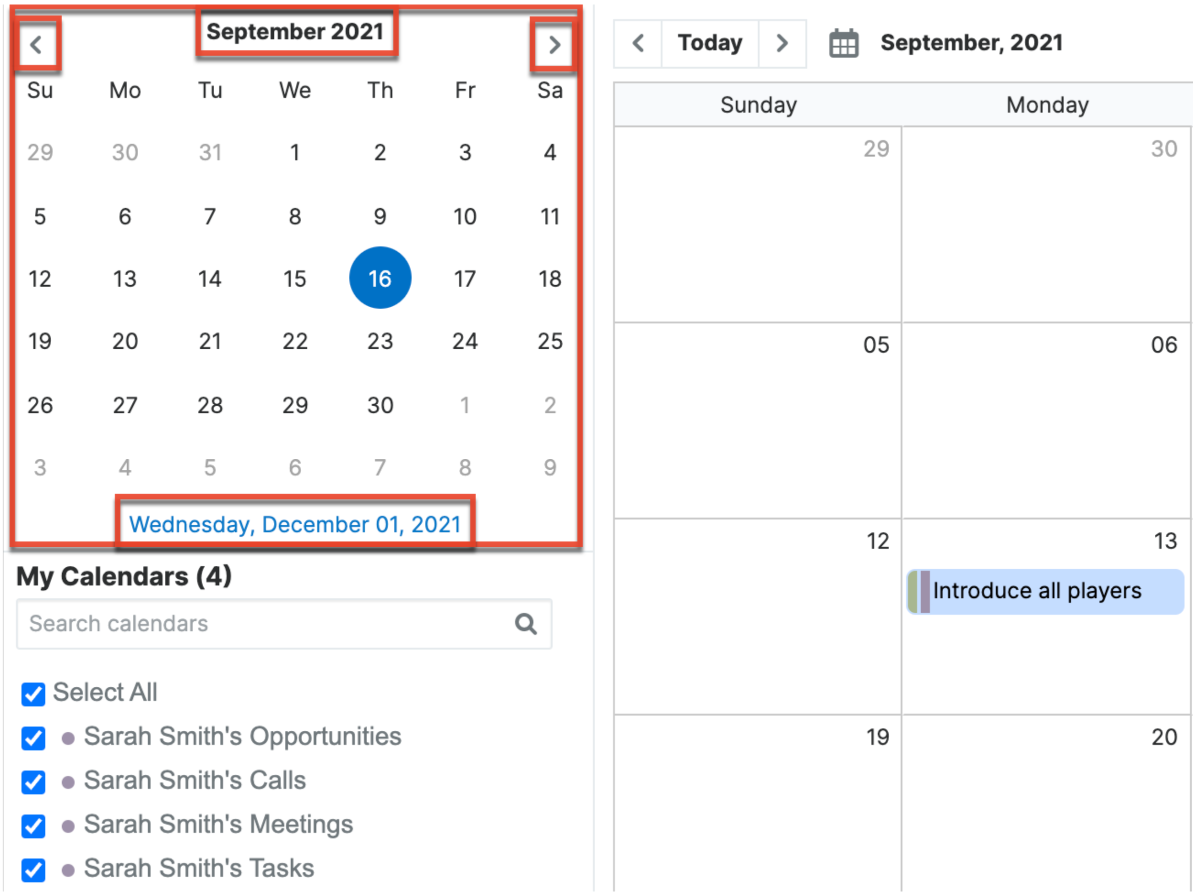
Please note that you will only be able to see calendars and events on calendars as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration Guide.



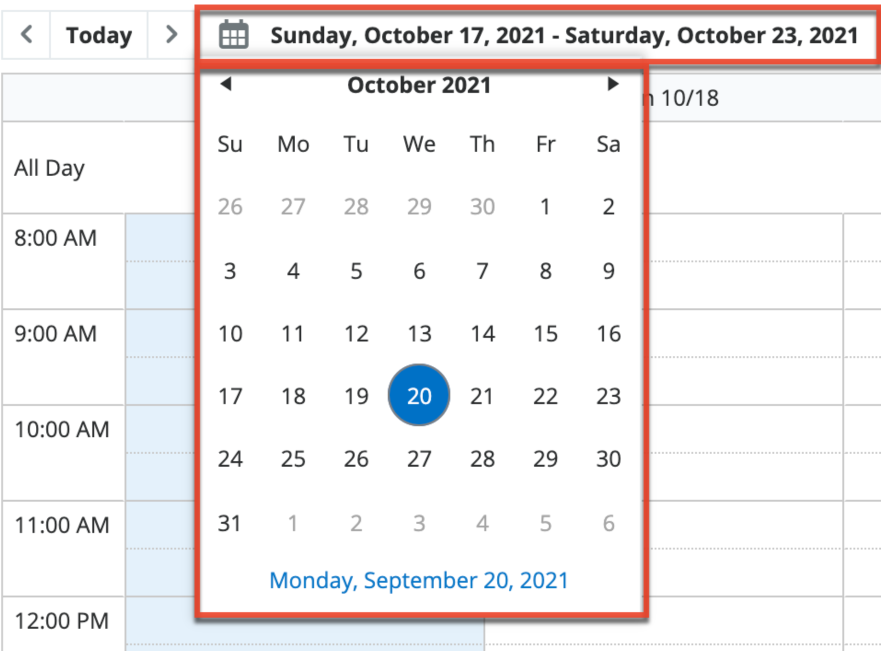
You can choose which calendars to show on the calendar view by checking the boxes next to the calendar names in the My Calendars and User and Team Calendars panels on the left side of the calendar. The My Calendars panel shows all calendars that are assigned to a team that you are a member of. Enabling more than one calendar will show each calendar's events overlaid on a single calendar view. Click "Select All" to select all calendars in the list.

Hover your mouse on the cell of an existing calendar event to view tooltip information that you specified in the calendar templates. You can also double-click the calendar event to enact your double-click event action that is configured for the calendar. Click on the colored strip on the left side of the calendar event to open the record preview on the right side of the calendar.

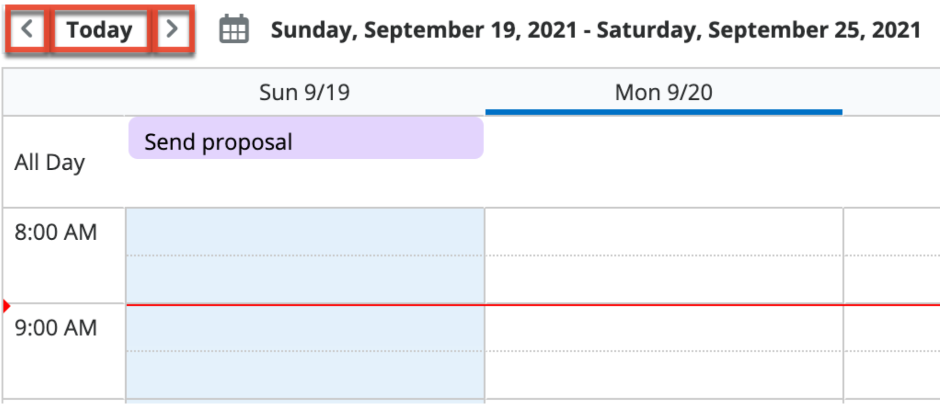
Jump to a different date by using the Date jumper on the top left side of the calendar. You will remain in your day, work week, week, agenda, timeline, or scheduler view by clicking on a date in the Date jumper. If you are in month view and click on a date in the Date jumper, you will be taken to the day view for that date. Select any date within the same month or use the left or right arrows to navigate to previous or upcoming months. You can click the date written as text (e.g., "September 2021") at the top of the Date jumper to zoom out to see all months in the year, then you can click the year text (e.g., "2021") to zoom out to see all years in the decade, etc., to more easily navigate through months and years. Click the date link written as text (e.g., "Wednesday, December 01, 2021") at the bottom of the Date jumper to go to today's day, work week, week, agenda, timeline, or scheduler view, depending on your current view.



Jump to a different date and remain in your day, work week, week, month, agenda, timeline, or scheduler view by clicking the date text to the right of the Today button to open the date picker.



You can always jump to today's date by clicking Today on the top left of the calendar view. Alternatively, you can jump to the next day, work week, week, month, agenda, timeline, or scheduler, depending on your current view, using the left and right arrows on either side of the Today button at the top left of the calendar view.



The calendar view can also be changed to have a different first day of the week using the Calendar Options in your user profile. Simply navigate to the Advanced tab of your user profile, then scroll to the Calendar Options panel and select the appropriate "First Day of Week" (e.g., Sunday, Monday). For more information on configuring the first day of the week, please refer to the Getting Started documentation.

Calendar Views

The Calendar module can be viewed as a Day, Week, Work Week, Month, Agenda, Timeline, or Scheduler view using the View selector dropdown menu near the top right of the calendar. The view options are:

View Option	Description
Day	View the calendar one day at a time with 30-minute increments marked. Click the "Show full day" or "Show Calendar Day" button on the bottom left of the calendar to expand or collapse the visible hours, respectively. All-day events are shown at the top of the day.
Work Week	View a 5-day work-week with 30-minute increments marked. Workdays are defined as Monday through Friday. If "First Day of Week" in Profile > Advanced > Calendar Options is set to either Saturday or Sunday, the Work

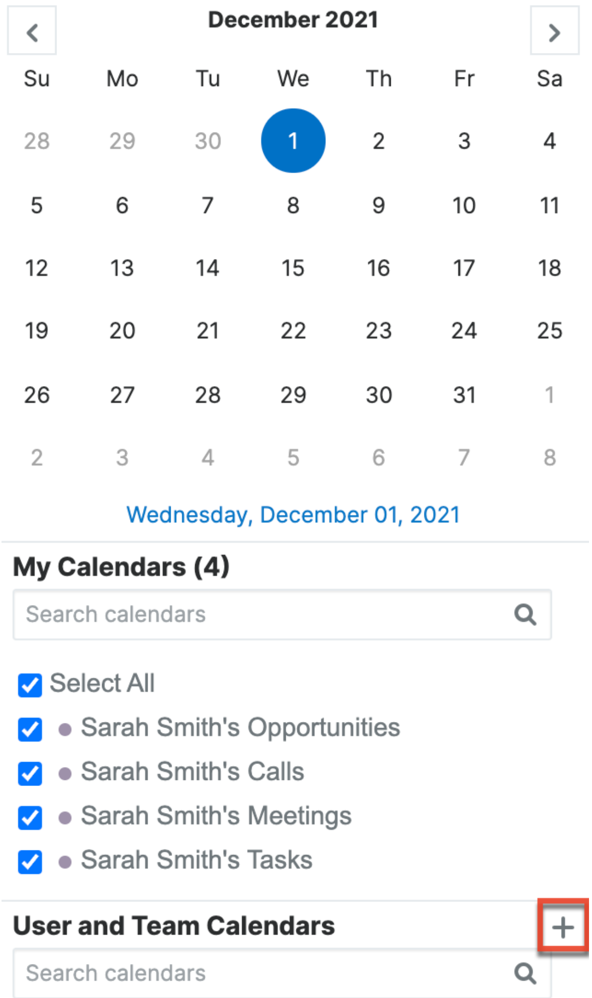
	Week view displays Monday as the first day of the week. If "First Day of Week" is Tuesday, Wednesday, Thursday, or Friday, the Work Week view displays the remainder of the current week and then continues into the following week without showing weekend days. Click the "Show full day" or "Show Calendar Day" button on the bottom left of the calendar to expand or collapse the visible hours, respectively. All-day events are shown at the top of the day.
Week	View a 7-day week with 30-minute increments marked. Click the "Show full day" or "Show Calendar Day" button on the bottom left of the calendar to expand or collapse the visible hours, respectively. All-day events are shown at the top of the day.
Month	View a full month.
Agenda	View events in the upcoming week, including today. Three columns are shown: Date, Time, and Event. The Time column displays the start and end time of the event, if applicable. All-day events show "all day" in the Time column.
Timeline	View events for the current day in a horizontal hourly view that shows event duration (start and end times). Scroll left and right on the timeline to see more times. Click the "Show full day" or "Show Calendar Day" button on the bottom left of the calendar to expand or collapse the visible hours, respectively. All-day events are shown as spanning the full day.
Scheduler	View events for the current month in a horizontal day view. Scroll left and right on the scheduler to see more days.

Viewing User and Team Calendars

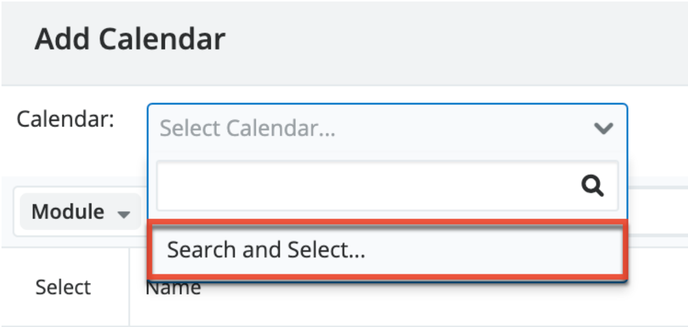
The Calendar module allows you to view not just your own activities, but also the calendars of other Sugar users in the panel labeled "User and Team Calendars". These calendars will be added to the User and Team Calendars panel on the left side of the calendar and you can decide which calendars to overlay on your calendar view by checking the corresponding checkboxes. Click "Select All" to select all calendars in the User and Team Calendars panel.

Use the following steps to add a user or team calendar:

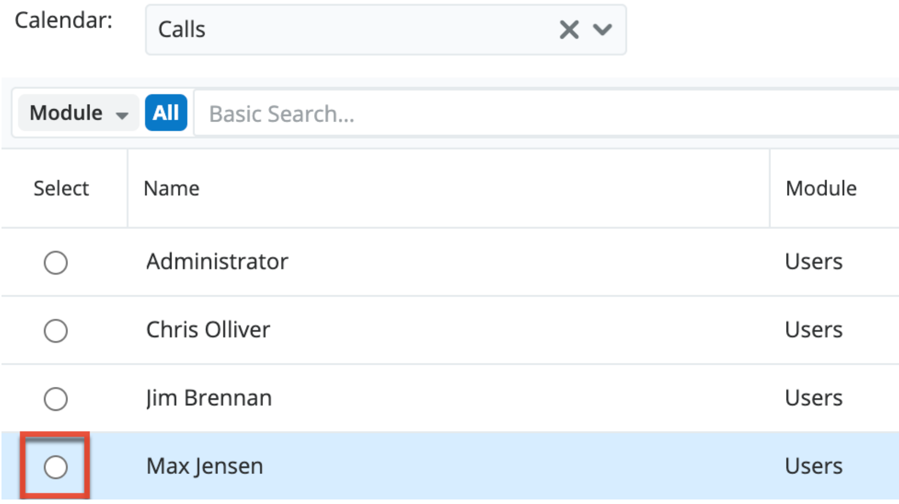
1. Click the plus button to the right of the User and Team Calendars panel.



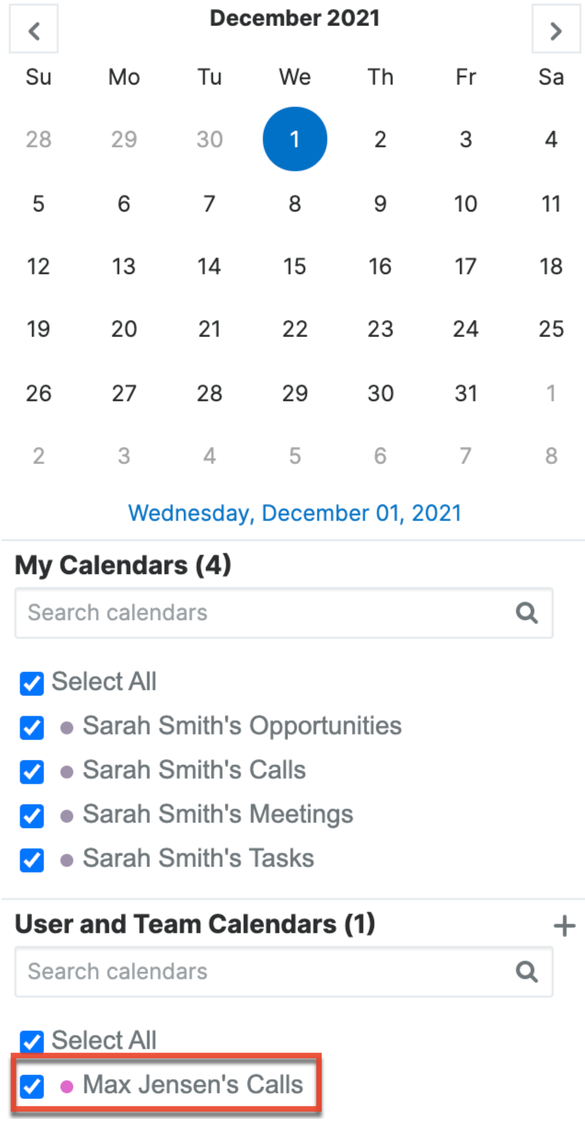
2. In the Add Calendar drawer, choose the calendar you want to show by clicking "Select Calendar" and then searching for the calendar. You can also click "Search and Select..." from the Select Calendar dropdown menu to open a list of calendars that you have access to.



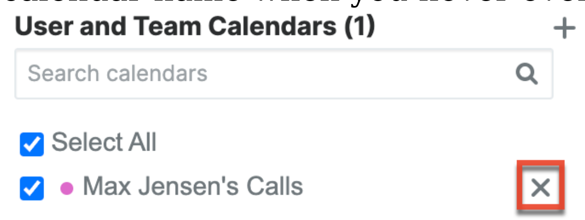
3. In the Add Calendar drawer, choose the user you want to apply the calendar to.



4. The user's calendar is added to the User and Team Calendars panel. Check or uncheck the checkbox to the left of the calendar to show or hide the calendar on your calendar view.



5. To hide a user or team calendar that you no longer want to see in your User and Team Calendars list, click the x that appears to the right of the calendar name when you hover over the calendar in the panel.



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.

Editing Calendar Events

Editing Events via Calendar

Sugar records displayed on the calendar can be edited directly from the calendar instead of having to access the record via the individual modules (e.g., Calls) depending on how you configured the calendar's double-click event setting. Dragging and dropping event cells within the calendar can make changes to the start and end dates. For more information on moving calendar events from within the calendar, please refer to the Moving Scheduled Events on the Calendar section of this documentation.

If you have the Double-Click Event field set to "Navigate to record", "Navigate to record in a new tab", or "Open drawer for edit" in the Settings tab of the calendar configuration window, you can use the following steps to edit a Sugar record via the calendar:

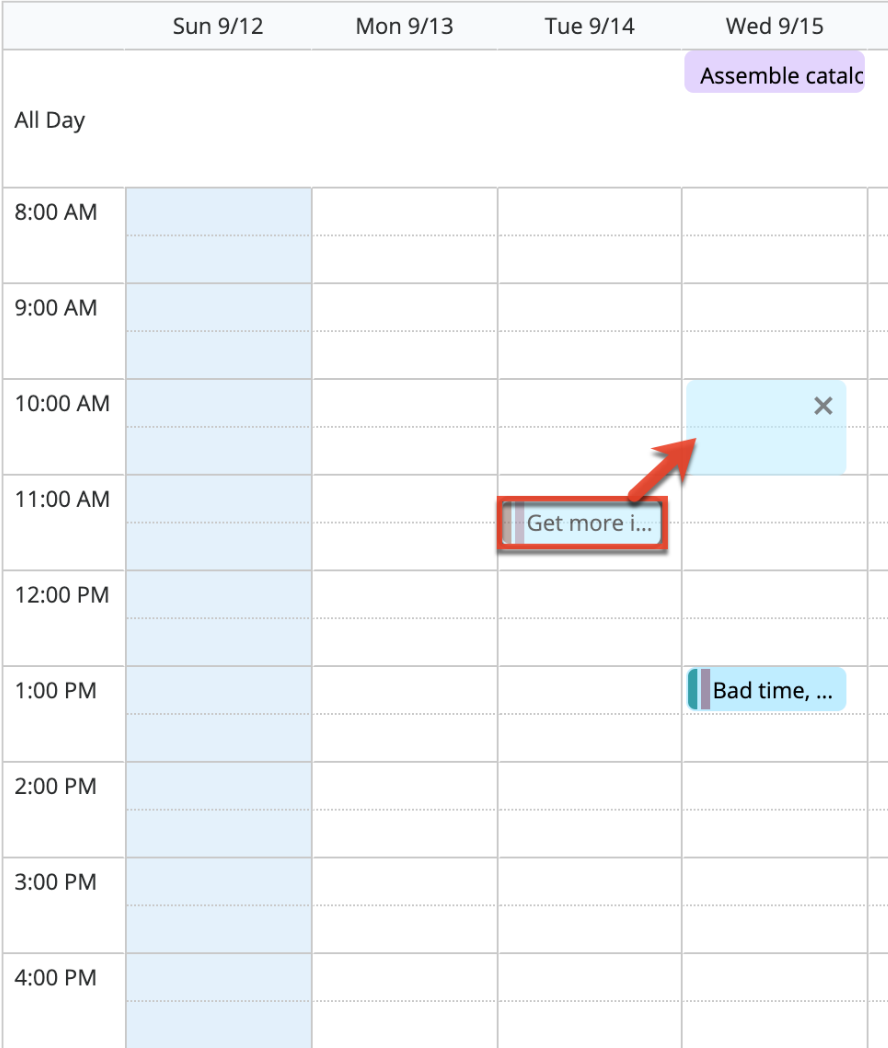
1. Navigate to the calendar by clicking the Calendar module tab.
2. Locate the calendar event (e.g., Meeting) you would like to edit and double-click on the event to open the associated record in the current tab, a separate tab, or a drawer, depending on your Double-click event setting.
3. Make the necessary changes to the event.
4. Click "Save" or, if you would like an invitation email to go out to the invitees where they can accept or decline the call or meeting, click "Save and Send Invites".

Please note that your ability to edit events 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.

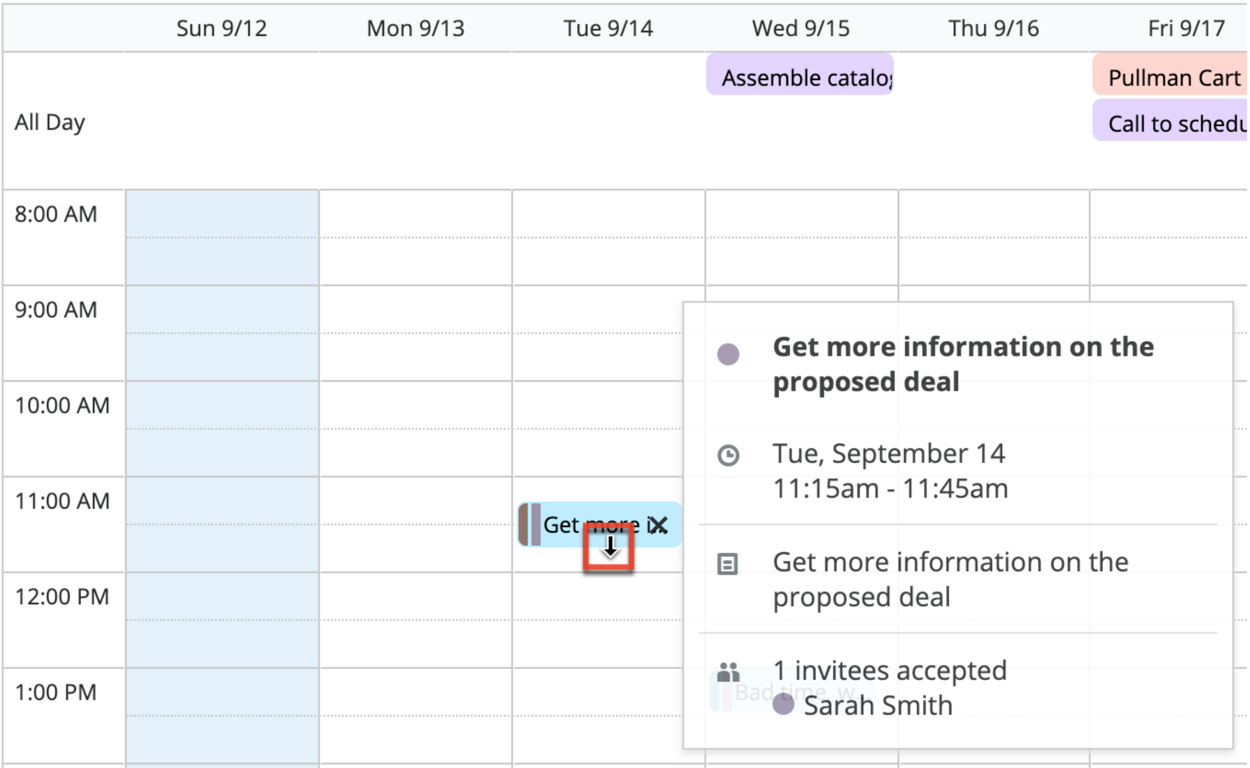
Moving Scheduled Events on the Calendar

The Sugar calendar allows for the start time and duration of events to be edited from the calendar instead of having to directly edit the record via the module. This option is available only if you have selected "Allow update" when creating the calendar and if you are allowed by your team membership, user access type, and assigned roles. The records that appear on the calendar can also be dragged and dropped to new locations to change the start date and time. When changing the details with drag-and-drop, a pop-up message will ask you to confirm your changes. For drag-and-drop changes to call and meeting events, you can also select "Save and Send Invites" in the pop-up message to send a system-generated email update to the meeting or call invitees. Sugar users will see the meeting updated in their Planned Activities dashlet and their calendars.

Note: All occurrences of recurring meetings and calls will not be modified by dragging one record of the series.

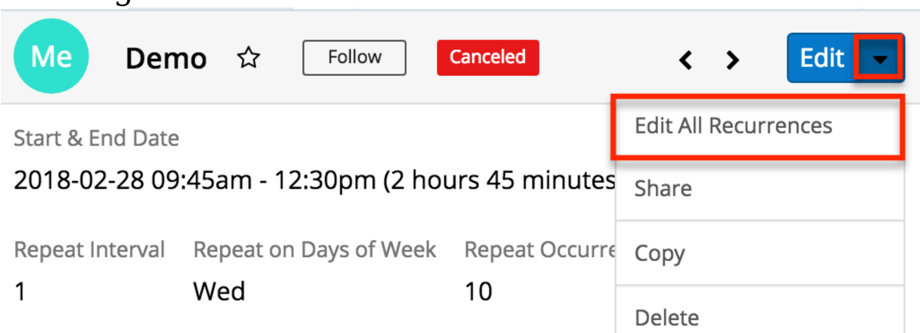


In addition, the events can be dragged from the bottom of the box to be able to change the duration of the event. To do this, simply hover over the event's box to make the down arrow appear at the bottom. Click when the arrow appears and drag to the new end time of the event.



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 occurrences of the same call or meeting and will only affect the one occurrence you are editing. Users must select "Edit All Recurrences" from the meeting record's Action Menu.

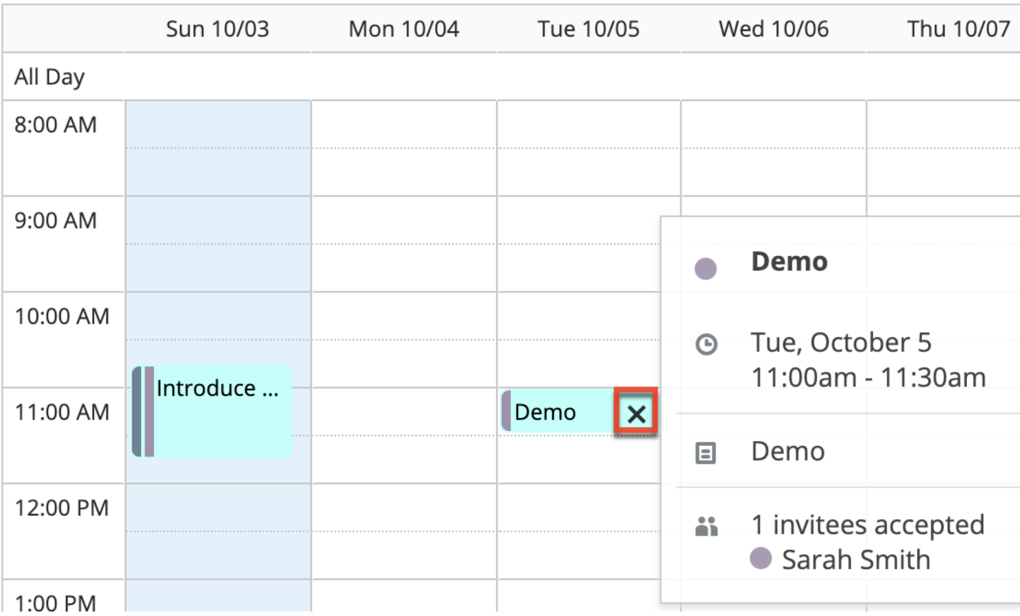


Please refer to the steps in the Editing All Recurrences via Record View section of the Meetings documentation for instructions on how to edit all recurrences.

Removing Events From Your Calendar

If an event appears on your calendar and you want to remove it from the view but do not want to delete the associated record, there are multiple ways to do so. You can adjust your filter settings for the calendar so that events of this type do not appear on your calendar or you can edit the event record so that the record is not captured by your current filter settings. For example, if you have a calendar that shows all of your meetings, your calendar will show all meetings that have a Status of Scheduled, Held, and Canceled. If you want to remove the canceled meetings from your calendar, you would need to modify the calendar's filter so that only meetings that have a Status of Scheduled or Held are displayed. This is an example of adjusting your filter settings for the calendar to remove events. As an example of editing the event records to remove the event from your calendar, if you had a calls calendar that showed all calls with a Status of "Scheduled", "In Progress", or "Held" and you see a call on your calendar that you know was canceled, change the call's Status to "Canceled" to remove this event from your calendar. Once the status has been updated, the calendar's filter will remove it from the view.

If you want to remove an event from your calendar and permanently delete its associated record (not common), use the following steps:

1. Navigate to the calendar by clicking the Calendar module tab.
2. Locate the event you would like to delete.
3. Click the x that appears when you hover over the event.


4. You will be asked to confirm whether or not you want to delete this record. Click "Confirm" to delete the record, or "Cancel" to keep the record.

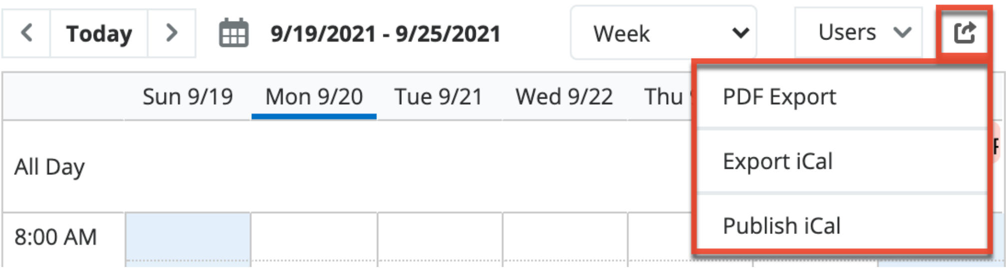
This option is available only if you have selected "Allow delete" when creating the calendar and if you are allowed by your team membership, user access type, and assigned roles.

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. Please refer to the steps in the Deleting All Recurrences via Record View section of the Meetings documentation for instructions on how to delete all recurrences.

Note: 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.

Sharing Calendars

Sugar allows users to share calendars between applications to ensure that activities do not overlap between calendars. The Sugar calendar can be viewed in other applications such as the Outlook calendar to display the user's free/busy time from Sugar.



Option	Description
PDF Export	Export a PDF of the current calendar view. Deselected calendars and events outside of the current calendar view will be omitted from the PDF calendar. Events that are changed after you export the iCal will not be visible on your exported iCal.
Export iCal	Export an iCal file that contains all scheduled events on the currently visible calendar(s). Events that occur on visible (i.e., checked in the My Calendars or User and Team Calendars pane) calendar(s) will be included in the file even if they occur outside of the current calendar view. You can edit what information is shared via iCal by adjusting the iCal event template in the

	calendar configuration. Events that are changed after you export the iCal will not be visible on your exported iCal.
Publish iCal	Generate a URL that can be used in another iCal-compatible application (e.g., Apple Calendar or Google Calendar). Events that are changed after you publish your iCal will be synced to the published calendar. **Note**: The sync is not instantaneous and may take several hours to complete.

Publishing Your Sugar Calendar

Sugar calendars can be shared and viewed with various iCal-compatible calendar applications (e.g., Apple Calendar 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 documentation.

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. Please note that the settings must be configured on each user's computer. Once configured, the invitee shows as busy for any time 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 appear on the Sugar calendar, but will not be editable via Sugar and only viewable.

For more information on using the Outlook Plug-in, please review the Sugar Plug-in for MS Outlook User Guide.

Calendar Scheduler Dashlet

The Calendar Scheduler dashlet allows you to conveniently view your calendars of choice within Sugar dashboards. The Calendar Scheduler dashlet behaves similarly to the Sidecar Calendar module.

When you add the dashlet, the following fields are available for configuration:

Field	**Description**
Available Views	Select the calendar views that you want to have available for viewing. The selected views are available in a dropdown menu in the top right of the dashlet for you to easily switch the view.
Default View	Select the calendar view that you want to have as the default view. Refreshing the page or navigating to a new page resets the view to the default view. Refreshing the dashlet does not reset the view to the default view.
My Calendars	Check the calendars that you want to display. The calendars in the My Calendars list are the same as those in the My Calendars pane of the Calendar module. The behavior (e.g., Double-click event option) and settings (e.g., color) of these calendars also match the behavior and settings of the same calendar in the Calendar module.
User and Team Calendars	Check the calendars for other users and teams that you want to display. The Calendars listed in the User and Team Calendars list are the same as those in the User and Team Calendars pane of

	the Calendar module. You can add other user or team calendars by clicking the plus icon. See the Viewing User and Team Calendars section for more information. The behavior (e.g., Double-click event option) and settings (e.g., color) of these calendars also match the behavior and settings of the same calendar in the Calendar module.

You can edit the configuration of these fields at any time by clicking the gear icon in the top right corner of the dashlet.

When viewing the Calendar Scheduler, there are several options along the top and bottom of the dashlet to help you navigate and adjust the appearance of the calendar. These options are defined as follows:

Option	**Description**
Today	The Today button is located near the top left corner of the dashlet and lets you jump to today on the calendar. Click the left and right arrow buttons on either side of "Today" to move the calendar view backward or forward in time relative to today. For more information, refer to the Viewing the Calendar section of this page.
Date or date range	The date or date range is located along the top of the dashlet to the right of the Today button. Click the date or date range to open a date picker from which you can select a new date or timeframe. For more information, refer to the Viewing the Calendar section of this page.
View selector	Toward the upper right of the calendar view, choose which of your configured Available Views to use. For more information on the available views, refer to the Calendar Views section of this page.
Users dropdown	To the right of the View selector, the Users dropdown shows a key that matches users with the colored stripes

	on the left side of the visible calendar events. This dropdown menu is populated only if visible calendar events include at least one internal user as a guest or owner.
Define Calendar Day (gear icon)	The button in the top right opens the Define Calendar Day dialog box. Set the "Start of Day" and "End of Day" to define the hours to show in day, week, work week, and timeline view.
Show full day	The "Show full day" button is located in the lower left corner of the dashlet. This button is shown only when your defined calendar day hours are visible in day, work week, week, and timeline view. This button expands the viewable hours beyond the calendar day that you define. Hours outside the workday are shaded blue.
Show Calendar Day	The "Show Calendar Day" button is located in the lower left corner of the dashlet. This button is shown only when the full day is visible in day, work week, week, and timeline view. This button collapses the viewable hours to the calendar day that you define.

You can create, update, or delete events from the dashlet if allowed based on the calendar settings, which are defined in the Calendar module. Refer to the Configuring Calendars documentation for more information about configuring the behavior and appearance of calendars.

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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. In addition to standard creation options, leads can provide their own details to you via a web-to-lead form. Once the lead is qualified according to your organization's practices, it can be converted into a contact, opportunity, account, or another record. This documentation covers information and actions specific to the Leads module.

For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting leads, please refer to the Working With Sugar Modules section of this page.

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.

Note: The Leads module is not available for Sugar Serve users. For more information on license types and the functionality available for each type, refer to the User Management documentation.

Lead Fields

The Leads module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged to best meet your organization's needs. Administrators or users with developer-level role 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 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.
Alternate Address	The lead's alternate address (e.g., billing, shipping).
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. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer.
Avatar	The lead's profile image. Click on the circle to the left of the name to upload an image. Once an image is uploaded, you can remove the image by clicking on the image and then clicking the trash can icon in the lower right corner.
Birthdate	The lead's date of birth.
Business Center Name [1]	The business center this lead belongs to, which is used in SugarBPM business hour calculations during lead routing in Sugar Sell. For more information, refer to the Stock SugarBPM Templates documentation.
Campaign	The campaign, if any, from which the lead originated.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
Converted	An indication that the lead has been converted to a contact, opportunity, or account.
D&B Principal ID	Unique ID number associated with the individual in D&B.
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	An indication that the lead should not be called.
Email Address	The lead's email address.
Facebook Account	The lead's Facebook account information.
Fax	The lead's fax number.
First Name	The lead's first name.
Google Plus ID	The lead's Google Plus ID.
Home Phone	The lead's residence number. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
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. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer.
Name	When viewing, the lead's full name. Click the circle to the left of the name to

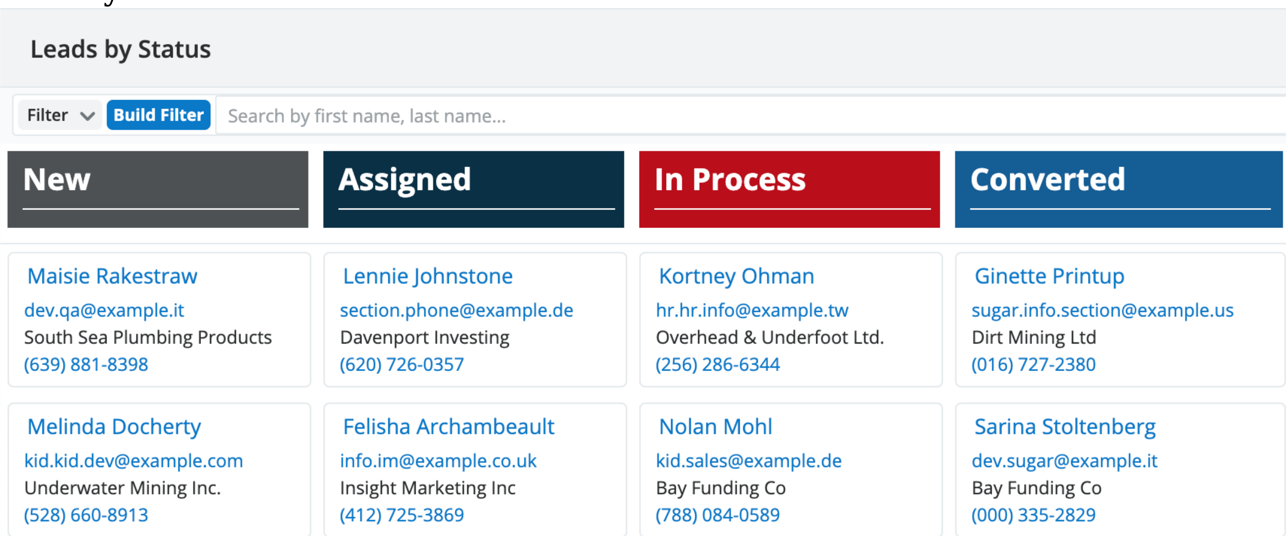
	upload an image to use as an avatar.
Office Phone	The lead's office number. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer.
Opportunity Amount	The expected opportunity amount for the potential business with the lead.
Opportunity Name	The opportunity name associated with the lead.
Other Phone	The lead's alternate phone number. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer.
Predictions	Displayed as a column in the Leads list view for Sugar Sell instances with SugarPredict enabled, this field shows the lead conversion likelihood scores for each record.
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. **Note**: The converted status cannot be set directly in the Status field. Rather, the conversion process must be completed.
Status Description	A description or other information about the lead's status.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating

	and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the lead record.
Title	The lead's business title.
Twitter Account	The lead's Twitter account information.
Website	The website URL associated with the lead's organization.

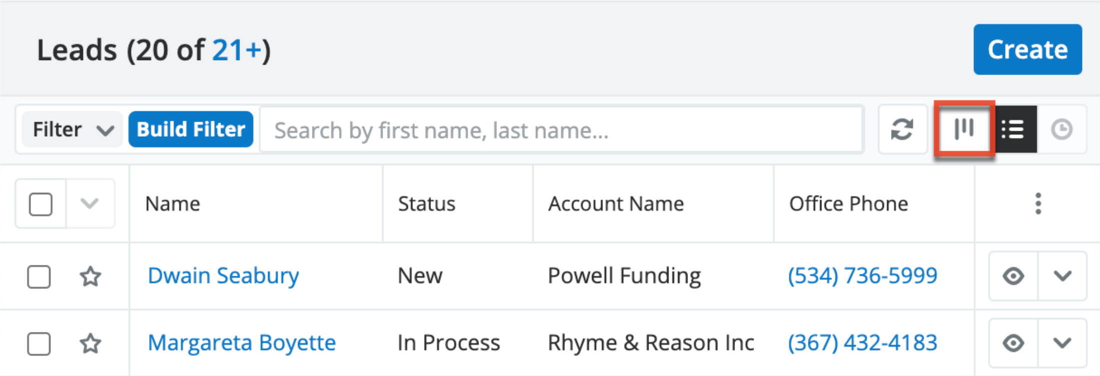
[1] This field's value is only visible to Sugar Sell users; when this field appears on layouts, users without a supported license type will see a placeholder containing the text "License Required" instead of the field's value. See the User Management page for more details on license types.

Leads Tile View

Tile View allows users to visualize and engage with their leads in an intuitive drag-and-drop interface. Users can drag a tile from one column to another to change its status. Please note that leads may be converted by dragging the tile into the Converted column and following the steps to convert a lead. However, leads cannot be unconverted, and therefore attempts to move tiles out of the Converted column will receive an error stating "Unable to change Lead status. This Lead has already been converted."



To access Tile View, navigate to the Leads list view and click on the Tile View icon to the right of the search bar:



For more information on using the Tile View, refer to the User Interface documentation. For information on configuring Tile View layouts, refer to the Tile View Settings documentation in the Administration Guide.

SugarPredict

Sugar Sell has the ability to incorporate the artificial intelligence (A.I.) capabilities of SugarPredict to give you profound insight into your lead and opportunity data, ultimately enabling you to convert leads and close opportunities faster and more consistently.

SugarPredict in Sugar Sell uses your account data along with intelligence gathered from millions of other companies and contacts to accurately predict who is most likely to become your next customer. The predictions are surfaced in Sugar via badges and scoring in dashlets and list views, making it easy for Sugar Sell users to quickly benefit from the insights at a glance.

For more information on SugarPredict dashlets and features in Sugar Sell (e.g., Lead Prediction), refer to the SugarPredict User Guide for Sugar Sell.

Lead Creation 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.

Converting Leads

Sugar enables you to convert leads into contacts once they qualify according to your organization's practices (e.g., after an evaluation/qualification process or upon entering into business with the individual). Sugar Sell users have the added ability to leverage the A.I. capabilities of SugarPredict, giving profound insight into their lead data and enabling them to convert leads faster and more consistently.

When a 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 and opportunity record.

You can convert a lead (see the steps to convert a lead) from the following places in the Leads module:

- **Record view**: Click the Unconverted badge or select "Convert" from the record's Actions menu.
- **List view**: Select "Convert" from the record's Actions menu in list view.
- **Tile View**: Drag and drop a lead's tile to the "Converted" column.
- **Subpanel**: From a related module's subpanel (e.g., the Leads subpanel under Accounts), select "Convert" in the record's Actions menu.
- **Record View dashlet**: If the lead is on the "one" side of a one-to-one or many-to-one relationship, the option to convert is shown in the Record View dashlet's Actions menu. For more information on the Record View dashlet, please refer to the Dashboards and Dashlets documentation.

Note: The converted status cannot be set directly in the Status field. Rather, the conversion process must be completed.

Administrators may configure the Convert Lead layout via Admin > Studio. Admins can mark modules as required for conversion, add additional modules (e.g., Notes, Tasks) to the Convert layout, remove modules, and more. For more information on configuring the Convert layout, please refer to the Studio documentation in the Administration Guide.

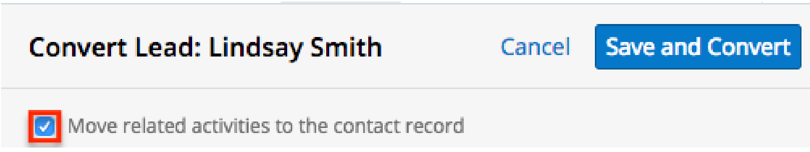
Lead Conversion Options

The lead's activities can be moved to the contact record created during conversion or left attached only to the lead depending on the lead conversion option selected by your administrator via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.

The lead conversion options available to be enabled by your administrator are as follows:

- **Move**: This option allows all of the lead's activities to be moved to the contact record created during the conversion. When enabled, the "Move related activities to the contact record" checkbox will be displayed on the Convert Lead page.
- **Do Nothing**: This option leaves the lead's activities only related to the converted lead.

If the Move option is enabled by your administrator, then the "Move related activities to the contact record" option will be displayed at the top of the Convert Lead page. Please note that the checkbox will be marked by default, but users can simply uncheck the box before converting the lead if they do not wish to move the lead's related activities to the contact record.

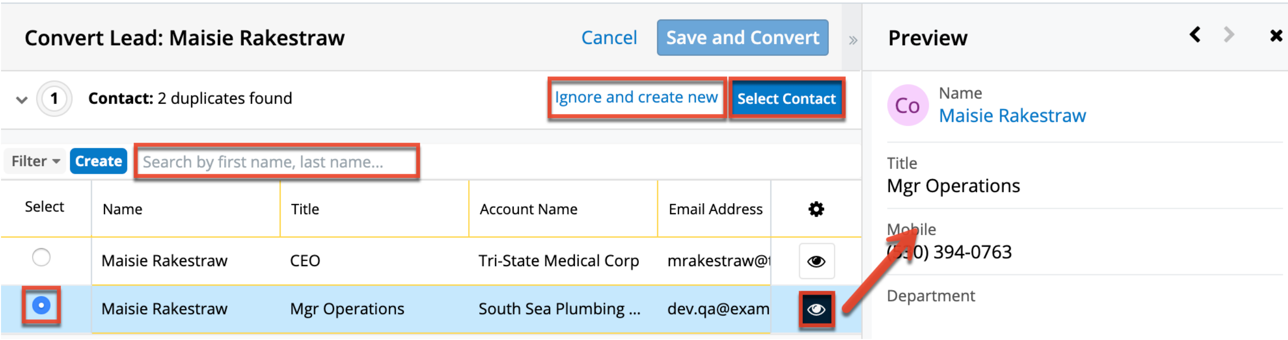


Please note that even if "Do Nothing" is selected, emails associated with the lead will still appear under the created contact as long as the lead and contact share the same email address. This is because emails carry an implicit relationship with any record containing an email address matching an address in the From, To, or CC lines of the email record.

Duplicate Record Check

Sugar automatically checks for any duplicate records (e.g., Contacts) in the system when converting the lead. The Convert Lead page will display any records that are detected as duplicates in a list view within the panels (e.g., Contact, Account). The first record in the list view will be automatically selected and you can simply click the Select button (e.g., Select Contact) on the upper right of the panel if you wish to relate the existing record to the lead. You can also preview the duplicate record(s) by clicking the Preview icon to the far right of the record's row. For more information on previewing records, please refer to the Preview section of this page.

In addition, the Search bar is available if you wish to perform a list view search for other existing records to relate to the lead. For more information on performing searches, please refer to the Search documentation. Please note that the duplicate check feature is enabled by default in Sugar and cannot be disabled by administrators or users.

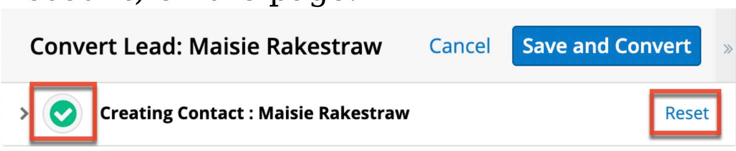


If none of the suggested duplicates are valid, simply click "Ignore and create new". If there are no duplicate records found for required modules (e.g., Contacts, Accounts) in lead conversion, the new record will be automatically related to the lead and the panel will be collapsed. The record view layout will be pre-populated with the associating record's (e.g., Leads) values (e.g., address).

Steps to Convert a Lead

Once the lead has been evaluated and qualified, it is ready to be converted to a contact. The panels (e.g., Account) on the Convert Lead page will indicate if any duplicate records are found and display the record(s) in the list view within the panel. If no duplicate records are found, the record (e.g., ABC Company) will be automatically related to the lead.

As the records are related to the lead, the panel will collapse and display a checkmark to the left of the header. If you wish to reset the association and complete the panel again, simply click the Reset link to the far right of the header, and the checkmark will disappear. Please note that the panel you are currently viewing (e.g., Contact) will collapse as you open up a different panel (e.g., Account) on the page.

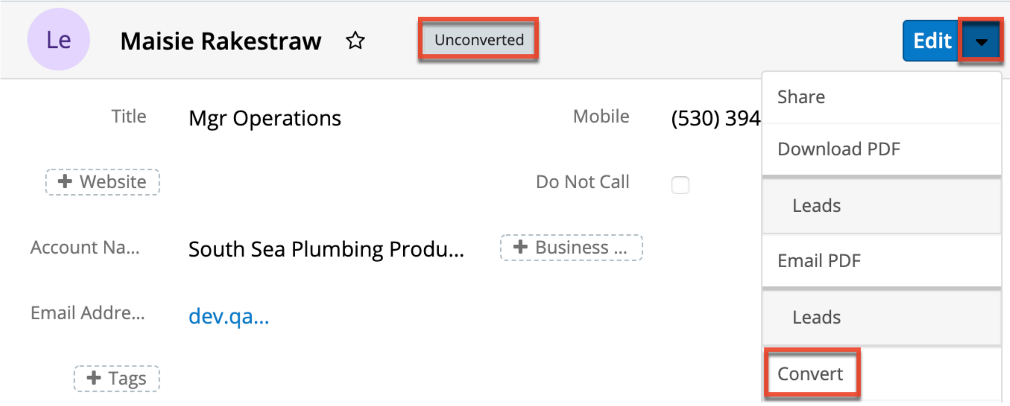


Note: The required modules (Contacts, Accounts) must be related to the lead before you can save and convert the lead successfully. For more information on enabling and requiring modules for lead conversion, please refer to the Studio documentation in the Administration Guide.

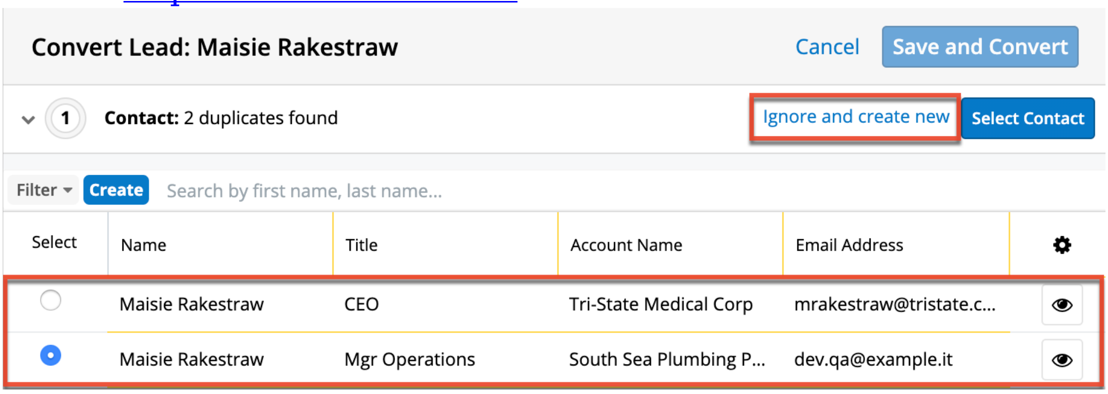
Use the following steps to convert a lead via the Leads record view:

1. Navigate to a Leads record view.
2. Select "Convert" from the Actions menu or initiate conversion using one of

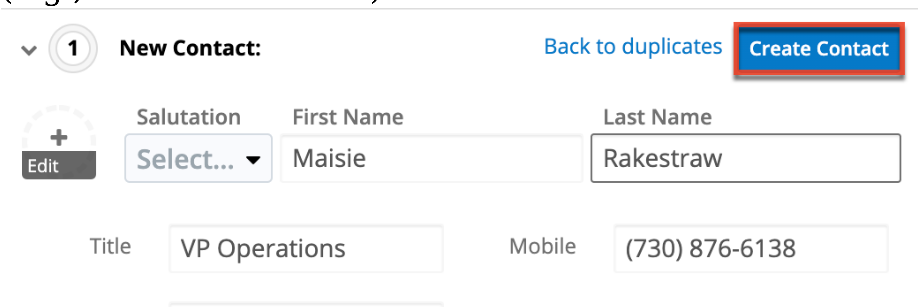
the methods listed in the Converting Leads section.



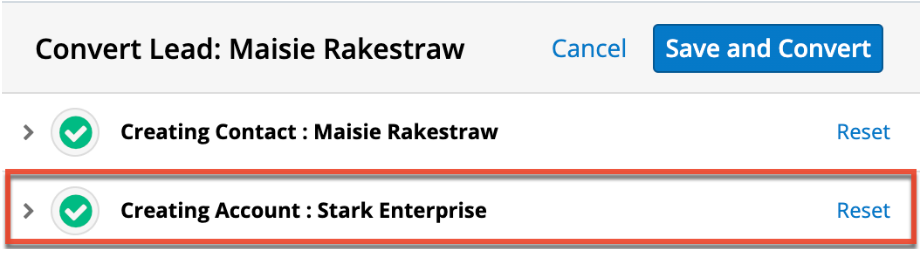
3. Sugar will perform a duplicate check for any existing records in the various modules.
    - The duplicate records (if any) will be displayed in a list view within each panel. For more information on duplicate record checks and selecting the record to associate to the lead, please refer to the Duplicate Record Check section above.



4. To create a new Contact record, click "Ignore and create new" on the upper right of the panel. The displayed record view will be pre-populated with the lead's values. Update any necessary fields then click the Create button (e.g., "Create Contact") to relate the new record to the lead.



5. If there are no duplicate records found for a required module (e.g., Accounts) in lead conversion, the new record will be automatically related to the lead and the panel will be collapsed. **Note**: The record view layout will be pre-populated with the lead's values (e.g., Address). Simply click the arrow to the far right of the header if you wish to expand the panel and view or alter the new record's details.



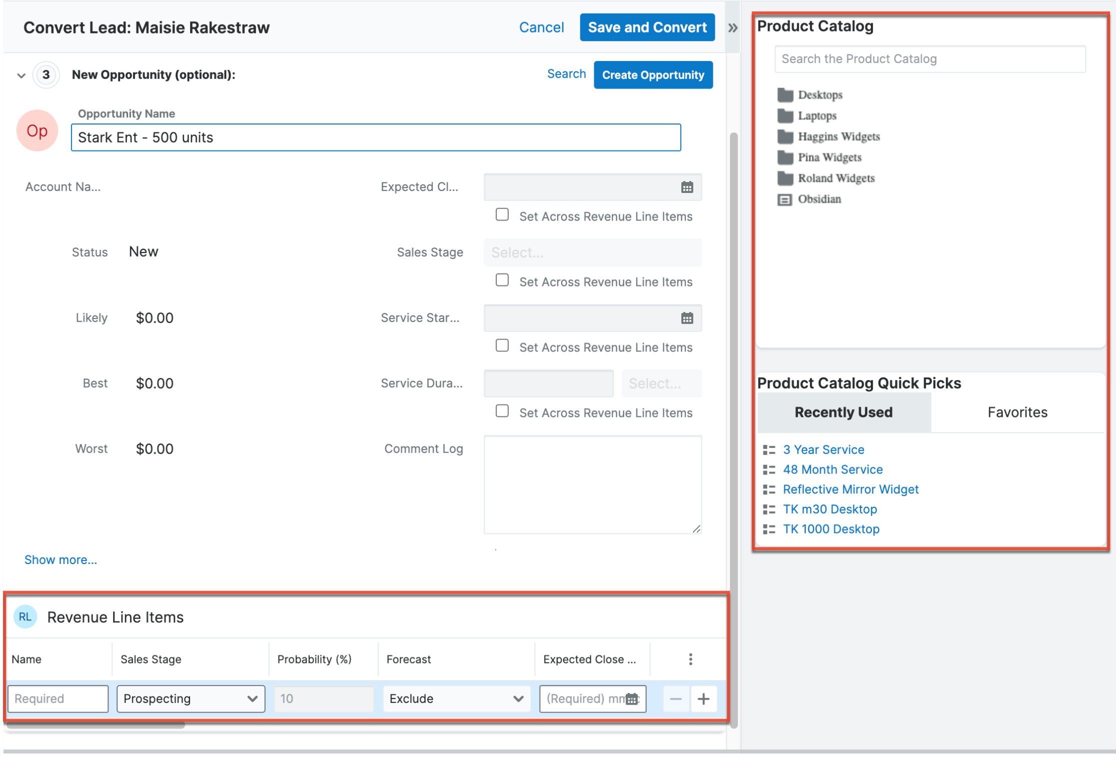
6. A new or existing opportunity record can be related to the lead accordingly.
    - If you wish to relate an existing opportunity to the lead, click "Search" to perform a list view search where you can select the opportunity.
    - If you wish to create a new opportunity instead, complete the fields in the opportunity record view in the panel. If your administrator has added the Revenue Line Items module to the Convert Lead layout, continue to step 7 to add revenue line items. If the Revenue Line Items module is not part of the Convert Lead layout, then, after entering the new opportunity details, simply click the Create Opportunity button and continue to step 8.

      Note: If the Opportunity panel is marked as optional, then no opportunity is required to convert the lead. For more information on setting modules as required on the Convert Lead layout, please refer to the Studio documentation in the Administration Guide.

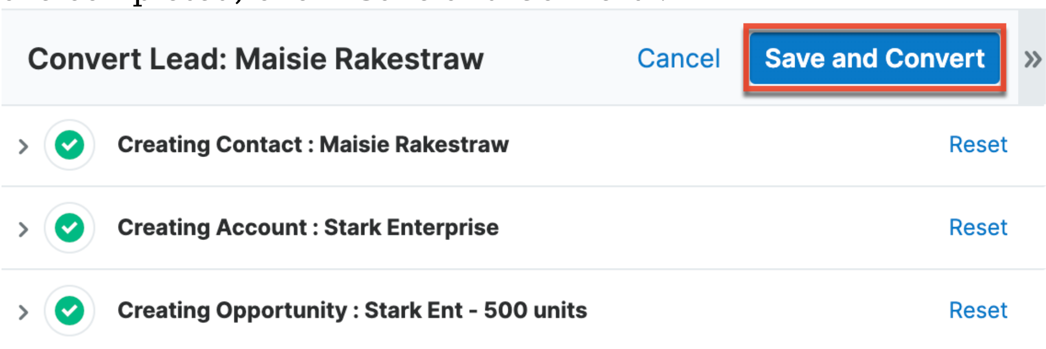
      

7. If your instance is configured for Opportunities and Revenue Line Items, then new or existing revenue line item records can also be related to the lead's opportunity.
    - If you selected an existing opportunity in the prior step, all related revenue line items will be added automatically.
    - If you had created a new opportunity, the Revenue Line Items subpanel is available to add products manually or by searching the Product Catalog or Product Catalog Quick Picks dashlets and clicking a record to add as a revenue line item. Please note that, while the dashlets will be visible, you will only be able to add a product catalog item when the Revenue Line Items subpanel is displayed.
    - Once completed, click "Create Opportunity".
      Note: The Revenue Line Items module can be added to the layout by an administrator. For more information on adding modules on the Convert Lead layout, please refer to the Studio documentation

in the Administration Guide.

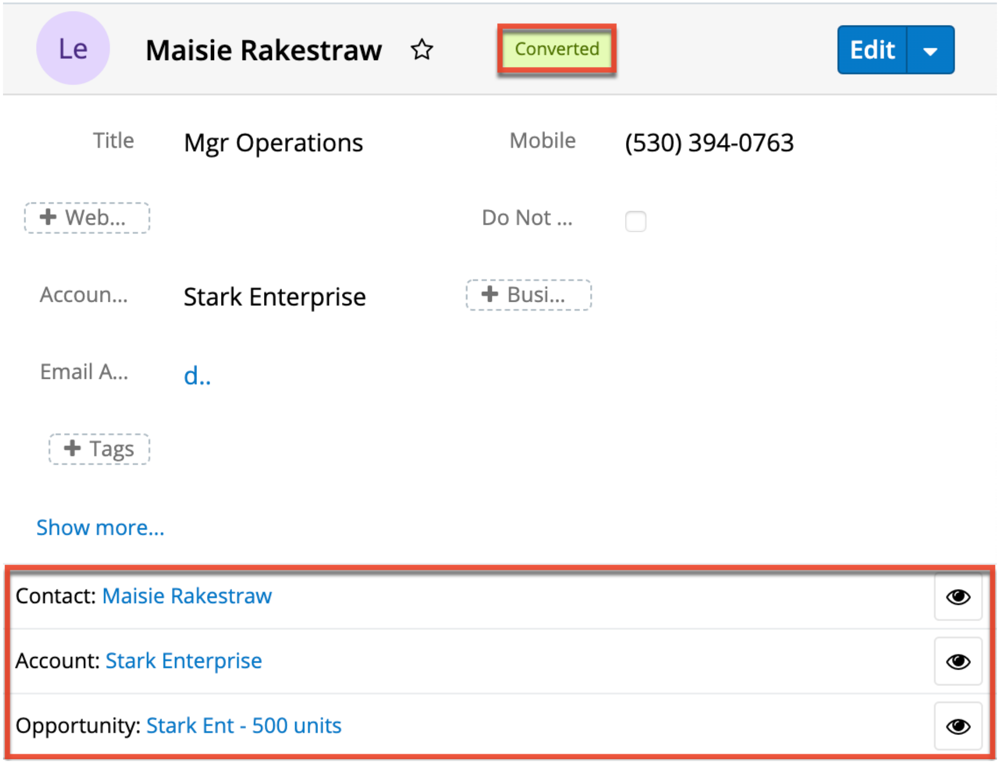


8. Once all of the necessary information is entered and the appropriate panels are completed, click "Save and Convert".



Once the lead has been converted successfully, the lead's record view will display the converted contact, account, and opportunity information below the record's detail. You can click the Preview icon to the far right of each record's row to view the details of the converted records.

Please note that the lead conversion can only be performed once in Sugar and once a lead is converted, the lead's status field will display "Converted". The status field becomes read-only upon conversion and cannot be manually changed for the lead.



Emails and Leads

Leads include an email address that can be used to email the lead as a recipient. The methods for doing so are covered in the Emailing Records section of the User Interface documentation. Leads may also be recipients of campaigns, which allow you to send email messages to a large group of recipients as well as to track the results of that message. Please refer to the Campaigns and Leads section of this page for more information. In addition to being a recipient or sender of an email, leads may be related to emails by being selected in the email's Related To field. These relationships allow the lead to display all relevant email correspondence in the Emails subpanel and History dashlet on a case's record view.

Emails Subpanel

The Emails subpanel in the Leads module displays emails that are associated with the lead record in a variety of ways:

- **Explicitly related to the lead**: If the lead is selected in the email's Related To field, the email and lead are explicitly related, and the email will appear in the lead's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the Emails documentation.

- **Implicitly related to the lead**: If one of the lead's email addresses appears in the email's From, To, or Cc fields, the email and lead are implicitly related, and the email will appear in the lead's Emails subpanel and History dashlet. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email leads or email archiving.

For more information on working with subpanels, please refer to the User Interface documentation.

Calls, Meetings, and Leads

Leads can be related to calls and meetings in two ways. First, they can be selected in the event's Related To field, indicating that the lead was the topic of the call or meeting. Second, they can be included as invitees to the call or meeting.

Calls and Meetings Subpanels

Each lead's record view includes a Calls subpanel and a Meetings subpanel. These subpanels display all calls and meetings which include the lead as an attendee. If the lead is not an attendee but is selected in the call's or meeting's Related To field, the call or meeting will not appear in the subpanels.

When relating an existing call or meeting to a lead via the subpanels on a lead's record view, the lead will automatically be added as an invitee. When creating a call or meeting from the subpanels, the lead will automatically be added as an attendee and the lead's account will automatically be set in the event's Related To field.

For more information on working with subpanels, please refer to the User Interface documentation.

Campaigns and Leads

Sugar's Campaigns module can be used to send mass emails or a series of newsletter emails to Sugar accounts, contacts, leads, and targets. The results of each campaign are recorded to measure its impact. Leads are not related directly to campaigns. Rather, each campaign is related to several target list records, and each target list is related to leads and other recipients. To send a campaign email to a lead, the lead should belong to a default-type target list related to the campaign. To prevent a lead from receiving emails from a campaign, the lead should belong to the campaign's suppression list-type target list. Once a campaign is sent, the results specific to a particular lead will appear in the Campaign Log Subpanel on the lead's record view as described in the Campaign Log Subpanel section of this page.

Leads can be added to target lists via the target list record itself, from the Leads list view using the Add To Target List option, or from the Leads record view using the Manage Subscription option. Instructions for using the Add To Target List and Manage Subscriptions options in the Leads module are provided in the sections below. For instructions on other available methods of adding to target lists, please refer to the Target Lists documentation.

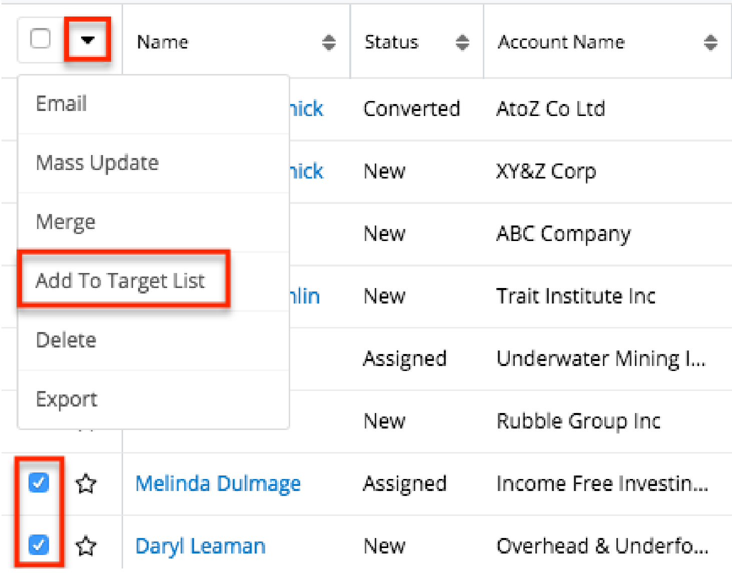
Adding to a Target List via Leads List View

A target list consists of a group of individuals or organizations you wish to be included in or excluded from 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 Mass Actions Menu. For more information on target lists and other methods of adding leads, please refer to the Target Lists documentation.

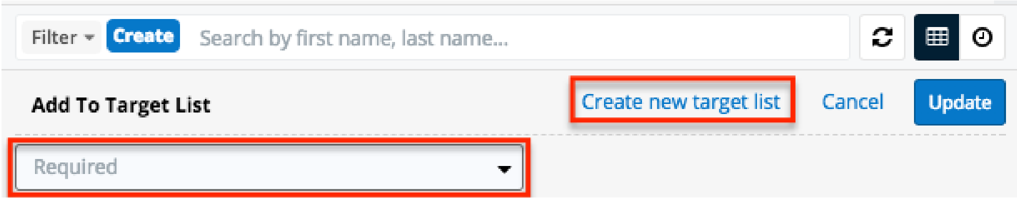
You can use the Select All feature in the list view when adding to a target list, which will allow you to easily select the first 1000 records in the result set. If you wish to add more than 1000 records or add a specific group of records to the target list, please use the filter option in list view search to perform the additions in smaller batches.

Use the following steps to add leads to a target list via the Leads list view:

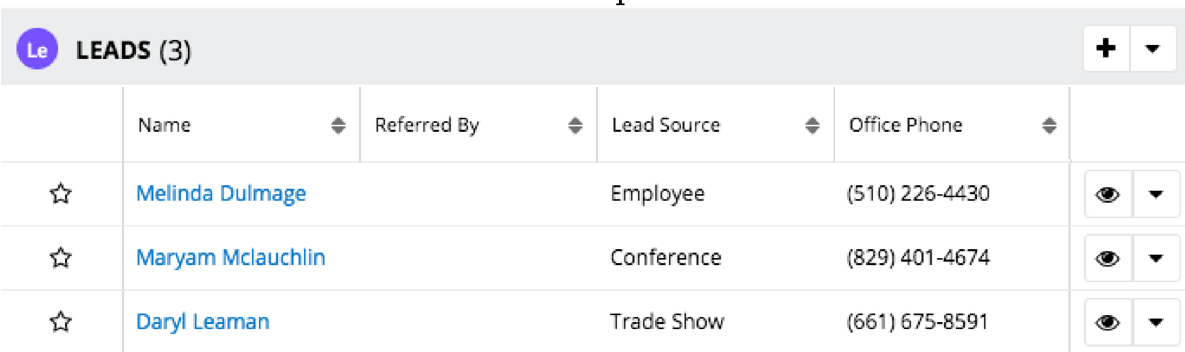
1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the List View Search to find the Lead records you wish to add to a target list.
3. Select the desired lead records then choose "Add to Target List" from the Mass Actions menu.



4. Below the search bar, locate and select the desired target list in the dropdown list or click "Create new target list" to add the leads to a new target list. Click "Update" to add the record(s) to the target list.



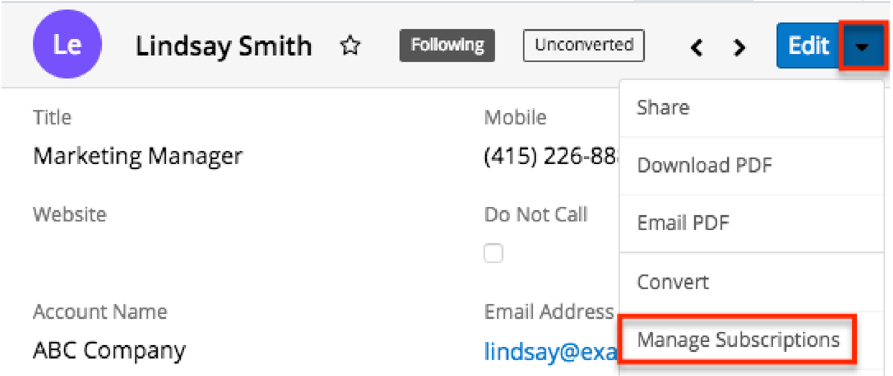
In order to view the leads that have been added, you can navigate to the Target Lists module. Click the target list's name to open the record view, and you will see the lead records within the Leads subpanel.



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 record 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 record view:

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


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.


5. Click "Save" to preserve your changes.

Campaign Log Subpanel

The Campaign Log subpanel contains historical information regarding a lead'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 Campaign Log subpanel on the contact's record view. 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 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 to a Target List via Leads List View section of this page. For more information on campaigns, please refer to the Campaigns documentation.

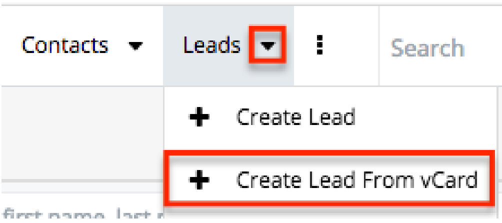
For more information on working with subpanels, please refer to the User Interface documentation.

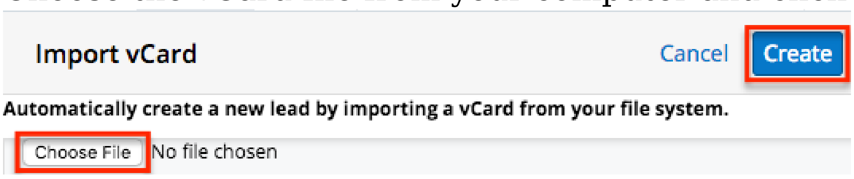
vCards and Leads

vCards are electronic business cards that are exchanged between applications such as email and web browsers. Leads may be created from vCards generated by another application or saved as vCards for use in other software.

Creating Leads via vCard

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

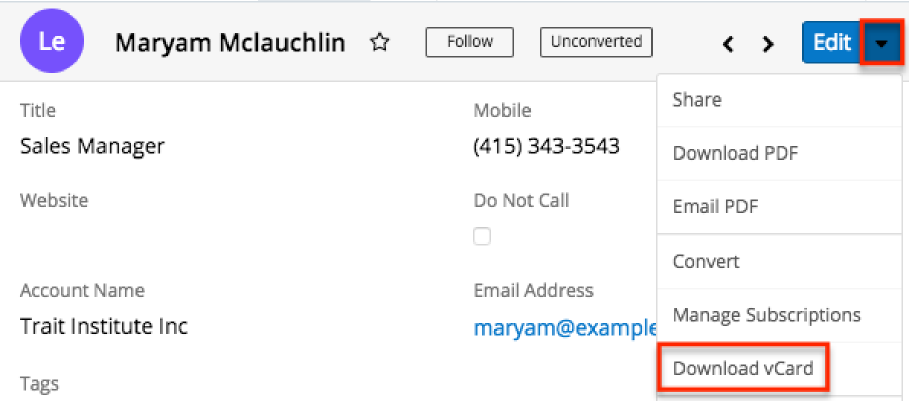
1. Click the triangle in the Leads module tab and select "Create Lead From vCard".


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


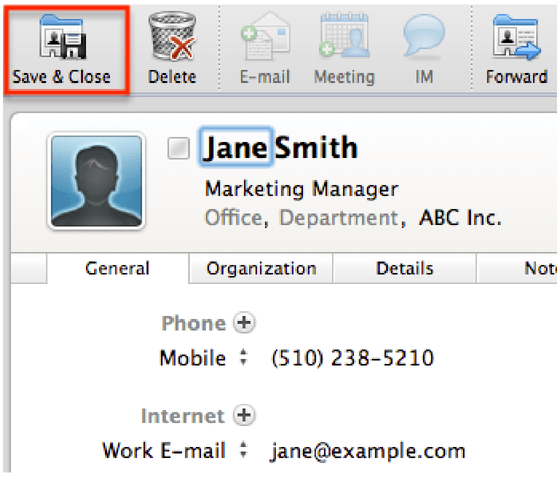
Downloading a Lead's vCard

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

1. Navigate to a Leads record view.
2. Select "Download vCard" from the Actions menu 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.



Working With Sugar Modules

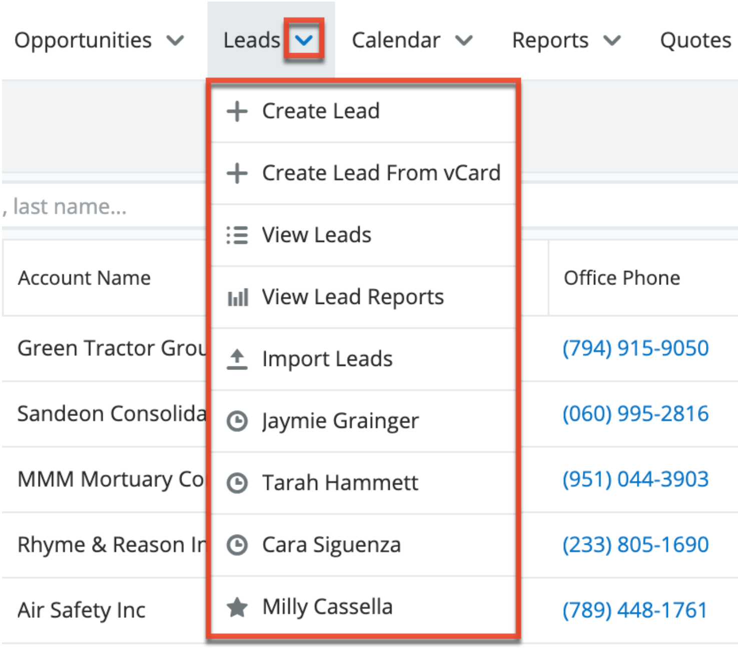
The Leads module uses Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Lead Menus

The Leads module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Leads-specific functionality, within this page.

Module Tab Menus

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 click the triangle in the Leads 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 leads you most recently viewed. The Favorites menu displays the list of leads you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Lead	Opens the record 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.

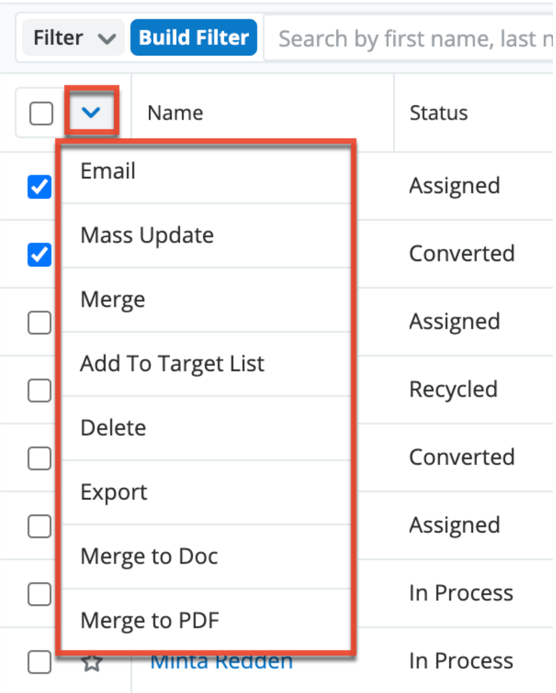
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Leads list view displays all lead records and allows for searching and filtering to locate specific leads. You can view the basic details of each record within the field columns of the list view or click a lead's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual lead records or click the checkbox in the list header to select all records displayed on the current set of list view results.



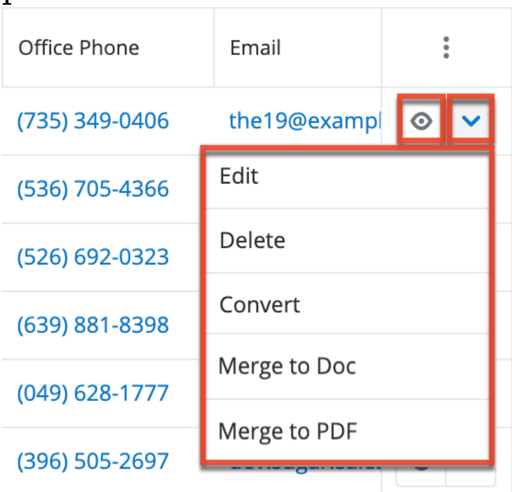
The options in the Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Email	Email one or more leads at a time.

Mass Update	Mass update one or more leads at a time.
Merge	Merge two or more duplicate leads.
Add to Target List	Add one or more leads to a target list.
Delete	Delete one or more leads at a time.
Export	Export one or more leads to a CSV file.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual lead directly from the list view.

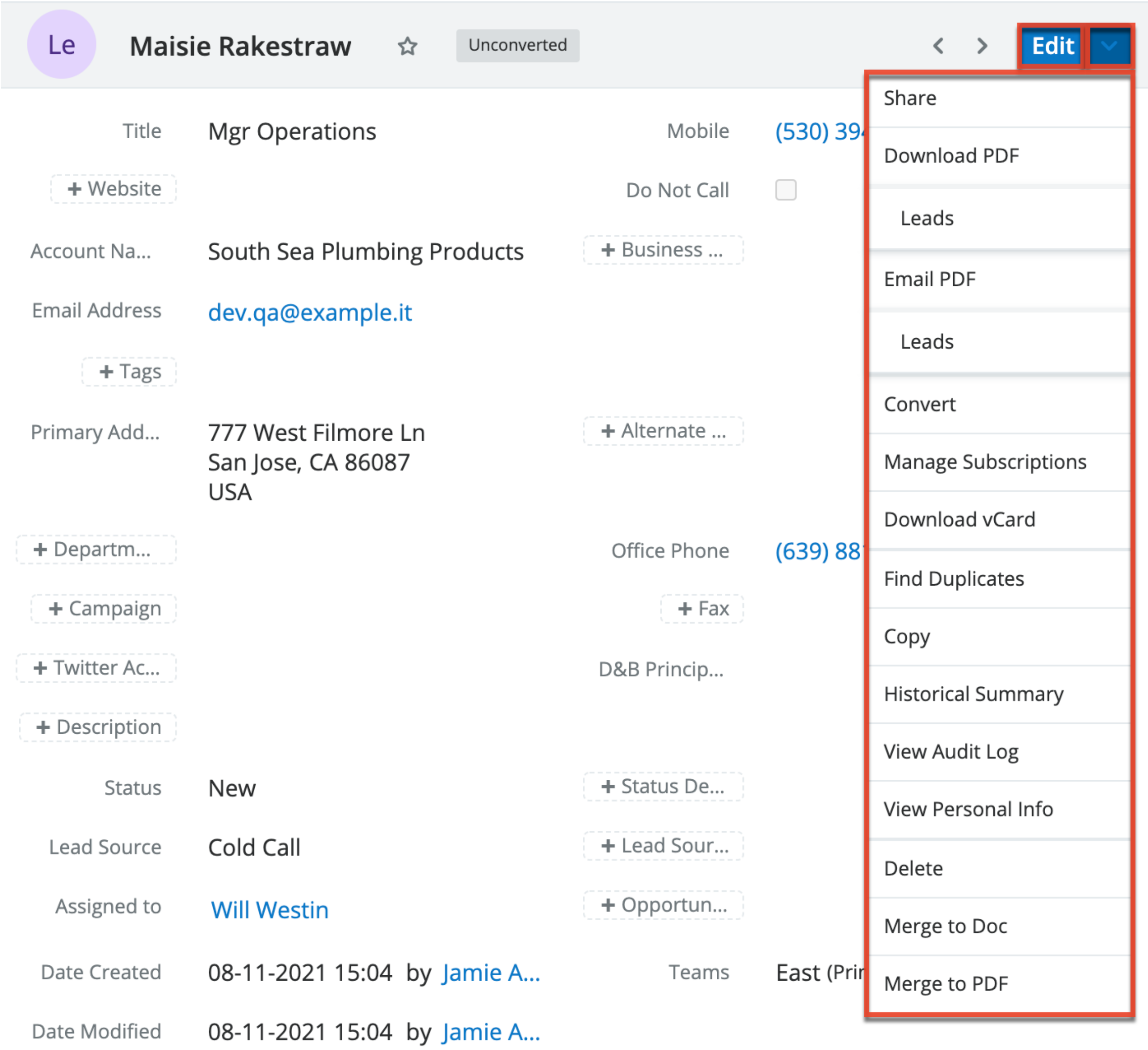


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this lead in the intelligence pane.
Edit	Edit this lead.
Follow	(Available if Activity Streams are enabled) Follow changes to this contact in your activity stream.
Delete	Delete this lead.
Convert	Convert a qualified lead into a contact, account, or opportunity.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Leads record view displays a single lead in full detail including its fields, subpanels of related records, and activity stream. To access a lead's record view, simply click a hyperlinked lead name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



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

Menu Item	Description
Edit	Edit this lead.
Share	Share a link to this lead via email.
Download PDF	Download lead information as a PDF file.
Email PDF	Email lead information as a PDF attachment.
Convert	Convert a qualified lead into a contact, account, or opportunity.
Manage Subscriptions	Manage this lead's campaign

	subscriptions.
Download vCard	Download a vCard from Sugar and transfer this lead's information to another application (e.g., Outlook).
Find Duplicates	Locate potential duplicates of this lead.
Copy	Duplicate this lead.
Historical Summary	View a historical summary of activities (e.g., calls, meetings, etc.) related to this lead.
View Audit Log	View a record of changes to this lead.
View Personal Info	Display this record's fields which an admin has designated as personal information.
Delete	Delete this lead.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to leads.

General Instructions for Working With Sugar Modules	**Leads-Specific Instructions**
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Leads-specific help exists for each topic, use the links below to navigate to sections of the current page.
Creating Records	Lead Creation via Web-to-Lead Form Converting Leads Creating Leads via vCard
Viewing Records	

Searching for Records	
List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	
Editing Records	
Deleting Records	
Emailing Records	Emails and Leads Campaigns and Leads
Exporting Records	Downloading a Lead's vCard
Recalculating Calculated Values	
Finding Duplicate Records	
Merging Records	
Viewing Record Historical Summaries	
Viewing Record Audit Logs	
Record PDFs	
Favoriting Records	
Following Records	
Sharing Records	

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Contacts

Overview

Sugar's Contacts module consists of individual people with whom your organization has an established relationship. Sugar enables you to convert lead records to contact records according to your organization's qualification process. Contact records are typically related to an account record, and multiple contacts may be associated with a single account. 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 information and actions specific to the Contacts module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting contacts, please refer to the Working With Sugar Modules section of this page.

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.

Contact Fields

The Contacts module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role 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.
Alternate Address	The contact's alternate address (e.g., billing or shipping).
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. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer. For Sugar Serve users logged in to Amazon Connect, calls are dialed in SugarLive.
Avatar	An image of the contact (e.g., business card or profile picture). Click on the circle to the left of the name to upload

	an image. Once an image is uploaded, you can remove the image by clicking on the image and then clicking the trash can icon in the lower right corner.
Birthdate	The contact's date of birth.
Business Center Name [1]	The business center this contact belongs to. In Sugar Sell, contacts created during lead conversion inherit the lead's business center, which is then used for SugarBPM business hour calculations. For more information, refer to the Stock SugarBPM Templates documentation.
Campaign [2]	The campaign, if any, from which the contact originated.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
Confirm Portal Password	When editing, confirmation of the contact's password for accessing Sugar Portal.
Contact Source	A system-level dropdown field that represents the origin of newly created contacts. It is set to External on contacts created via Portal and set to Internal on contacts created in Sugar. This field is not available in Studio or the user interface and is only available in SugarBPM.
D&B Principal ID	Unique ID number associated with the contact in D&B.
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.
Facebook Account	The contact's Facebook account information.
Fax	The contact's fax number.
First Name	The contact's first name.
Google Plus ID	The contact's Google Plus ID.
Home	The contact's residence number. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer. For Sugar Serve users logged in to Amazon Connect, calls are dialed in SugarLive.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
Last Name	The contact's last name.
Lead Source	The source from which the contact originated. **Note**: The Lead Source field will be set to "Support Portal User Registration" for contacts created via portal registration.
Mobile	The contact's mobile number. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer. For Sugar Serve users logged in to Amazon Connect, calls are

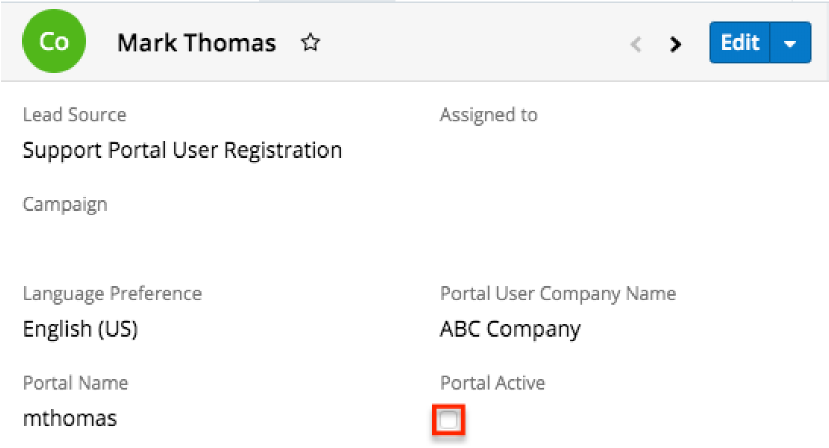
	dialed in SugarLive.
Name	When viewing, the contact's full name. Click the circle to the left of the name to upload an image to use as an avatar.
Office Phone	The contact's office number. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer. For Sugar Serve users logged in to Amazon Connect, calls are dialed in SugarLive.
Other Phone	The contact's alternate phone number. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer. For Sugar Serve users logged in to Amazon Connect, calls are dialed in SugarLive.
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.
Portal User Company Name	The name of the company to which the customer belongs to. **Note**: This field will display the company name the customer enters when signing up for the 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 mail client	Indication that the contact should be synced to mail client when using the Sugar Plug-in for Outlook, for example. **Note**: This field must be set on a per-user basis.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the contact record.
Title	The contact's title within his or her company.
Twitter Account	The contact's Twitter account information.

[1] This field's value is only visible to Sugar Serve and Sugar Sell users; when this field appears on layouts, users without a supported license type will see a placeholder containing the text "License Required" instead of the field's value. See the User Management page for more details on license types.
[2] This field's value is not visible to Sugar Serve users; when this field appears on layouts, users without a supported license type will see a placeholder containing the text "License Required" instead of the field's value. See the User Management page for more details on license types.

Contact Creation via Sugar Portal

The Sugar Portal allows your customers to review published knowledge base articles created in Sugar. Please note that customers have to be registered users of the portal in order to be able to access the portal. When a potential portal user visits the portal login page and completes the registration form, their information is entered into Sugar as a new contact record with the Lead Source field set to "Support Portal User Registration". Once the contact record is validated and approved for portal access, you can enable the Portal Active checkbox to activate their portal account. For more information on managing the Sugar portal, please refer to the Portal Deployment User Guide.



Emails and Contacts

Contacts include an email address that can be used to email the contact as a recipient. The methods for doing so are covered in the Emailing Records section of the User Interface documentation. Contacts may also be recipients of campaigns that allow you to send email messages to a large group of recipients as well as to track the results of that message. Please refer to the Campaigns and Contacts section of this page for more information. In addition to being a recipient or sender of an email, contacts may be related to emails by being selected in the email's Related To field. These relationships allow the contact to display all relevant email correspondence in the Emails subpanel and History dashlet on a contact's record view.

Emails Subpanel

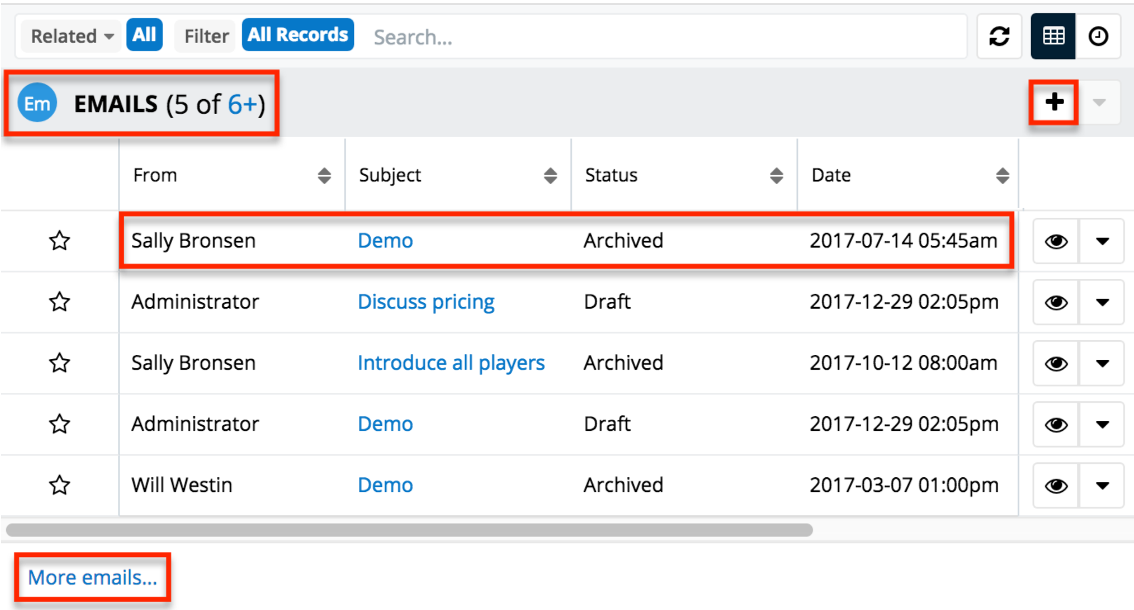
The Emails subpanel in the Contacts module displays emails which are associated with the contact record in a variety of ways:

- **Explicitly related to the contact**: If the contact is selected in the email's Related To field, the email and contact are explicitly related, and the email will appear in the contact's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the Emails documentation.
- **Implicitly related to the contact**: If one of the contact's email addresses appears in the email's From, To, or Cc fields, the email and contact are implicitly related, and the email will appear in the contact's Emails subpanel and History dashlet. This implicit relationship is made for emails

sent from Sugar as well as any email imported into Sugar via Inbound email contacts or email archiving.

The Emails subpanel allows the following functions to be performed:

- **Email Details**: To view the details of an email, click the subject to open it in detail view.
- **Record Count**: Subpanel headers display the total count of related records (e.g., "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g., "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- **Collapse or Expand**: Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
    - **Note**: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.
- **Column Widths**: Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- **Column Sort**: Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g., from ascending to descending).
- **Compose a New Email**: Click the Plus button on the upper right of a subpanel to create a new email with, by default, both an implicit and explicit relationship to the contact you are currently viewing. The email will automatically select the contact in the Related To field as well as add the contact's primary email address as a recipient in the To field.
    - **Note**: To send email from Sugar, users must configure their outbound email server via Emails > Email Settings or, if using the system email account to send email, the system's outbound email server must be configured by an administrator in Admin > System Email Settings.
    - **Note**: Because creating a new related record opens a drawer on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- **More Records**: By default, Sugar displays up to five records in each subpanel, though administrators can alter the number via Admin > System Settings as described in the System documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g., "More Emails...") at the bottom of the subpanel to load the next set of records.



Calls, Meetings, and Contacts

Contacts can be related to calls and meetings in two ways. First, they can be selected in the event's Related To field, indicating that the contact was the topic of the call or meeting. Second, they can be included as invitees to the call or meeting.

Calls and Meetings Subpanels

Each contact's record view includes a Calls subpanel and a Meetings subpanel. These subpanels display all calls and meetings which include the contact as an attendee. If the contact is not an attendee but is selected in the call's or meeting's Related To field, the call or meeting will not appear in the subpanels.

When relating an existing call or meeting to a contact via the subpanels on a contact's record view, the contact will automatically be added as an invitee. When creating a call or meeting from the subpanels, the contact will automatically be added as an attendee and the contact's account will automatically be set in the event's Related To field.

Campaigns and Contacts

Sugar's Campaigns module can be used to send mass emails or a series of newsletter emails to Sugar accounts, contacts, leads, and targets. The results of each campaign are recorded to measure its impact. Contacts are not related directly to campaigns. Rather, each campaign is related to several target list records, and each target list is related to contacts and other recipients. To send a campaign email to a contact, the contact should belong to a default-type target list related to the campaign. To prevent a contact from receiving emails from a campaign, the contact should belong to the campaign's suppression list-type target list. Once a campaign is sent, the results specific to a particular contact will appear in the Campaign Log Subpanel on the contact's record view as described in the Campaign Log Subpanel section of this page.

Contacts can be added to target lists via the target list record itself, from the Contacts list view using the Add To Target List option, or from the Contacts record view using the Manage Subscriptions option. Instructions for using the Add To Target List and Manage Subscriptions options in the Contacts module are provided in the sections below. For instructions on other available methods of adding to target lists, please refer to the Target Lists documentation.

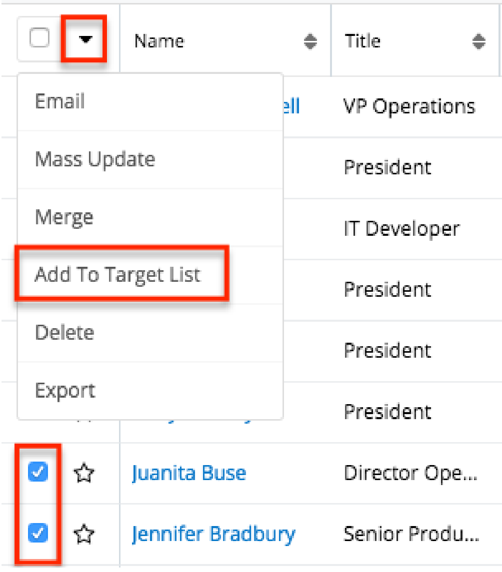
Adding to a Target List via Contacts List View

A target list consists of a group of individuals or organizations you wish to be included or excluded from 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 Mass Actions Menu. For more information on target lists and other methods of adding contacts, please refer to the Target Lists documentation.

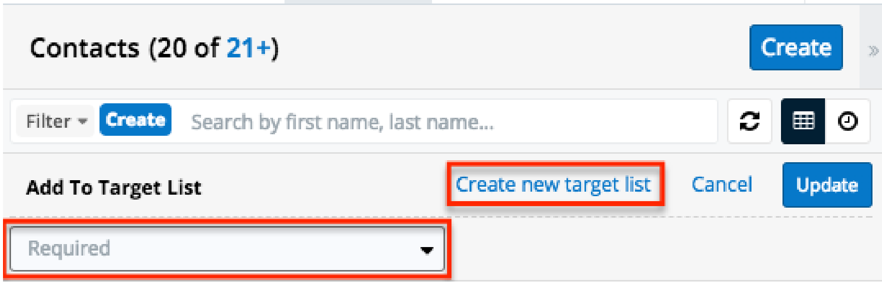
You can use the Select All feature in the list view when adding to a target list, which will allow you to easily select the first 1000 records in the result set. If you wish to add more than 1000 records or add a specific group of records to the target list, please use the filter option in list view search to perform the additions in smaller batches.

Use the following steps to add accounts to a target list via the Contacts list view:

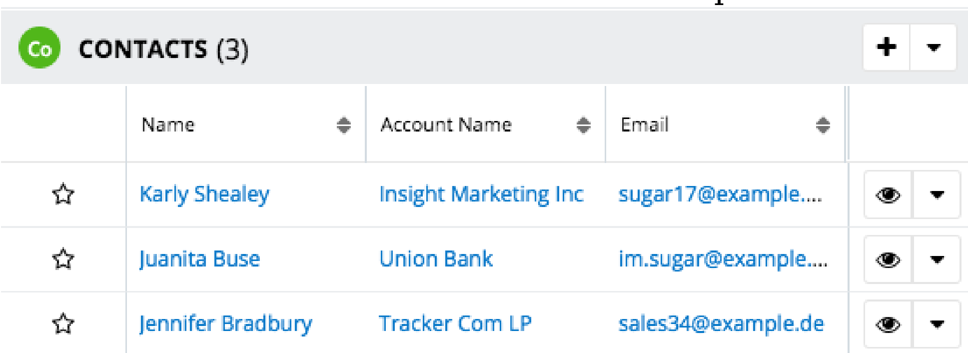
- Navigate to the Contacts list view by clicking the Contacts module tab.
- Use the List View Search to find the Contact records you wish to add to a target list.
- Select the desired contact records then choose "Add to Target List" from the Mass Actions menu.



- Below the search bar, locate and select the desired target list in the dropdown list or click "Create new target list" to add the contacts to a new target list. Click "Update" to add the record(s) to the 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 open the record view, and you will see the contact records within the Contacts subpanel.

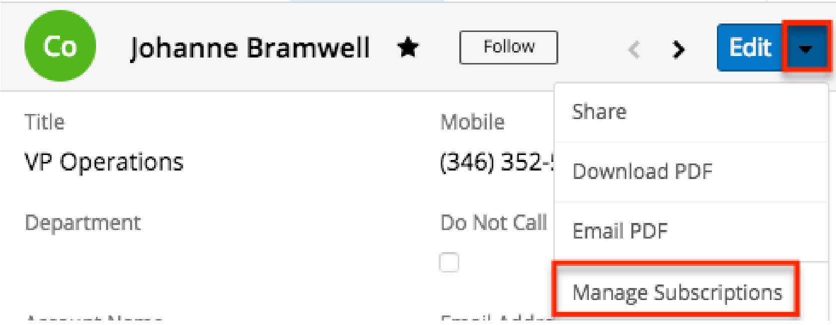


Managing Contact Subscriptions

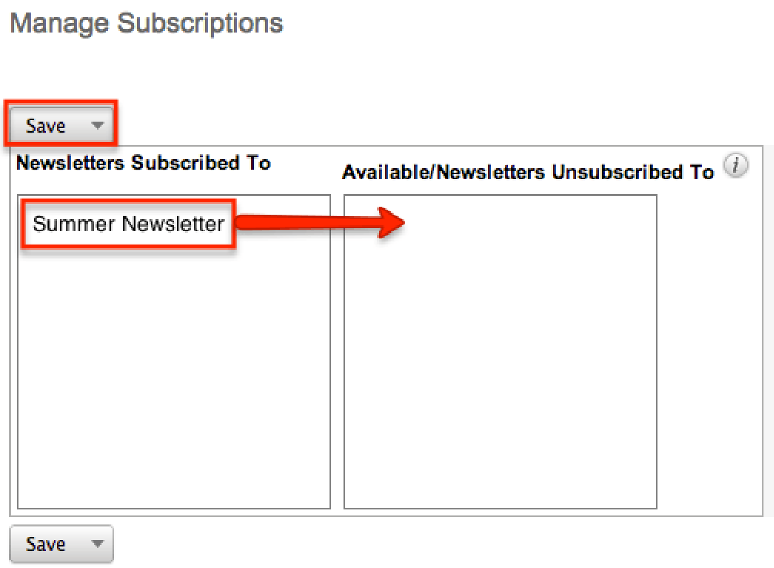
Contacts who receive newsletter-type campaign emails from your Sugar instance are considered subscribers to that newsletter. Users can manage these newsletter subscriptions from the Contacts record view using the Manage Subscriptions option in the Actions menu. Please note that you can only manage subscriptions 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 record view:

- Navigate to a contact's record view.
- Select "Manage Subscriptions" from the Actions menu.



- 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.
- 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.



- Click "Save" to preserve your changes.

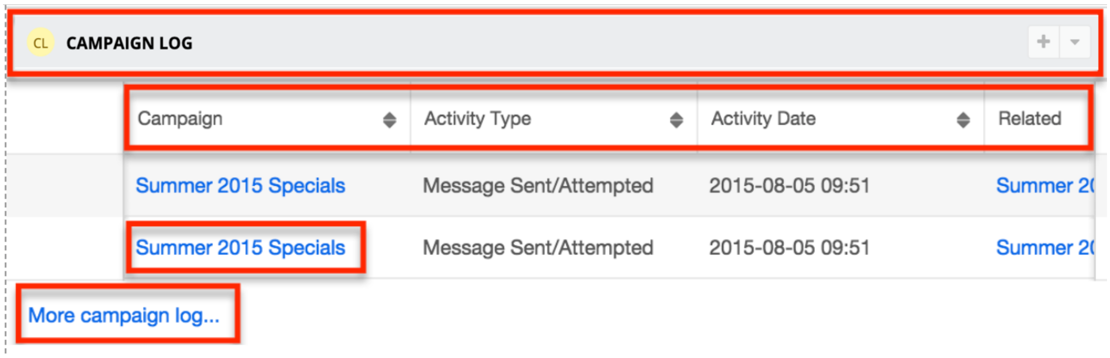
Campaign Log Subpanel

The Campaign Log subpanel contains historical information regarding a contact'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 Campaign Log subpanel on the contact's record view. 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 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 to a Target List via Contacts List View section of this page. For more information on campaigns, please refer to the Campaigns documentation.

The Campaign Log subpanel allows the following functions to be performed:

- **Campaign Details**: To view the details of a campaign, click its name to open it in detail view.
- **Record Count**: Subpanel headers display the total count of related records (e.g., "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g., "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- **Collapse or Expand**: Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
- **Note**: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.
- **Column Widths**: Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- **Column Sort**: Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g., from ascending to descending).
- **More Records**: By default, Sugar displays up to five records in each subpanel though administrators can alter the number via Admin > System Settings as described in the System documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..."

(e.g., "More campaign log...") at the bottom of the subpanel to load the next set of records.

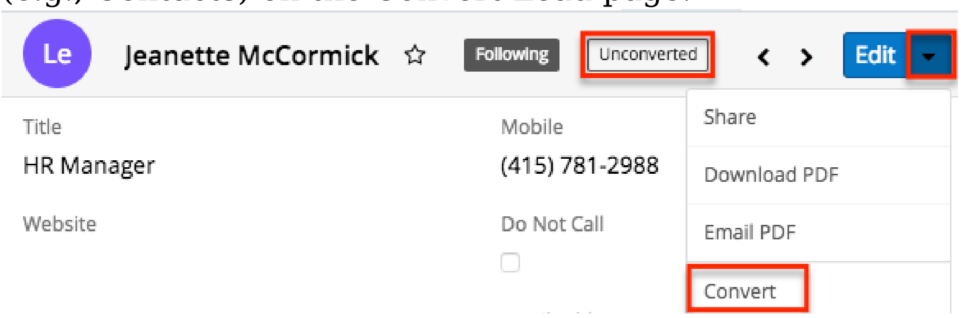


Converting Leads to Contacts

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.

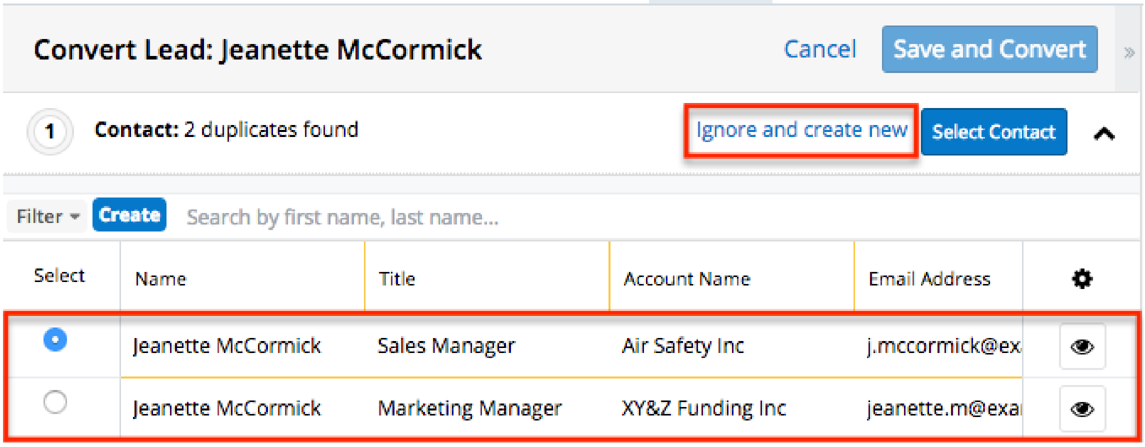
Use the following steps to convert leads into contacts:

- Navigate to a lead's record view.
- Select "Convert" from the Actions menu or click the Unconverted button to initiate the lead conversion process.
  Note: Sugar will automatically perform a duplicate check for the modules (e.g., Contacts) on the Convert Lead page.

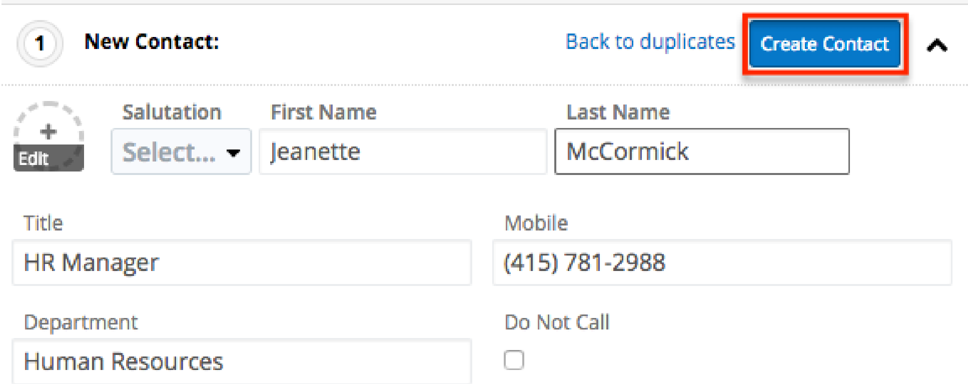


- If there are no duplicate records found for a module (e.g., Contacts), the new record will be automatically marked for creation on the Convert Lead page and associated to the lead. The panel will be collapsed as well, but you can click the header to open the panel and view the record's details.
- If there are duplicate records found for a module (e.g., Contacts), they will display in a list view within the panel. You can select an existing contact, or if none of the suggested duplicates are valid, simply click "Ignore and

create new" to create a new contact record.

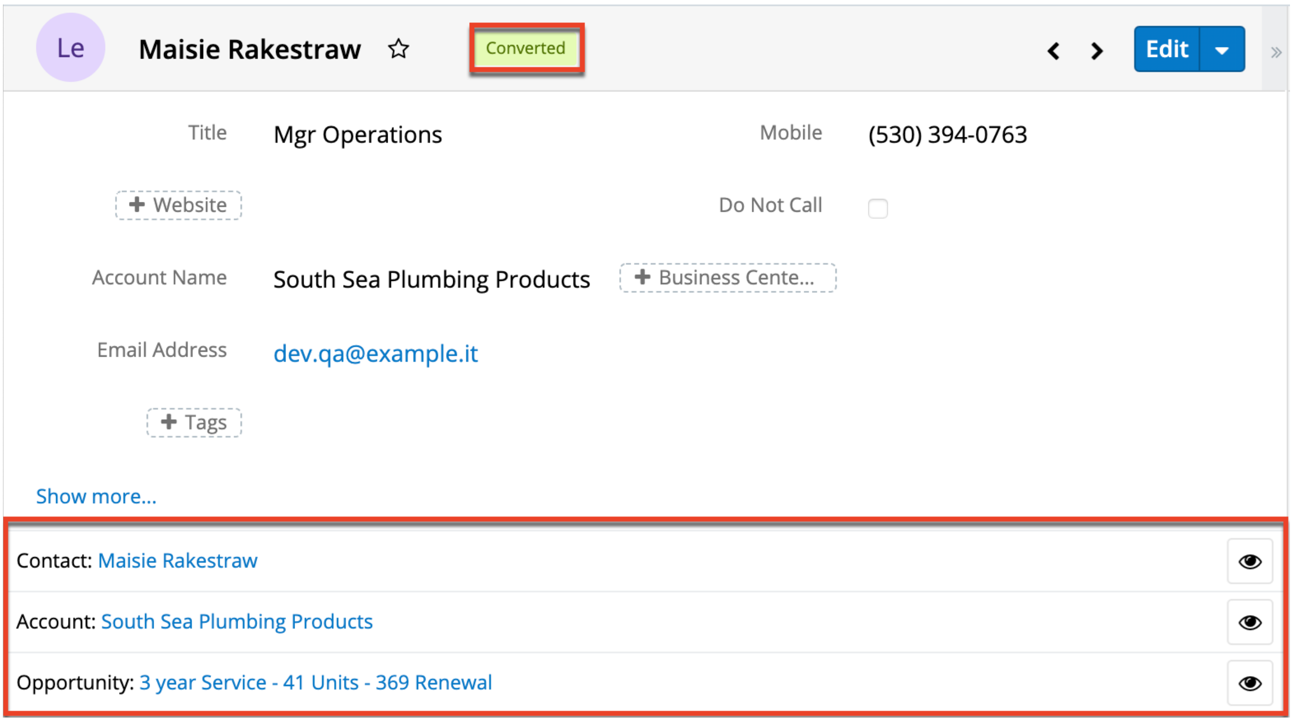


- Some of the fields (e.g., address, phone) on the displayed record view will be pre-populated with the lead's values. Simply update any necessary fields then click the Create Contact button.



- Complete the other module panels (Accounts, Opportunities) accordingly on the Convert Lead page.
- Once all of the necessary information is entered and the appropriate panels are completed, click "Save and Convert".

Once the lead has been converted successfully, the lead's record view will display the converted contact, account, and opportunity information below the record's detail. You can click the Preview icon to the far right of each record's row to view the details of the converted contact and other records.

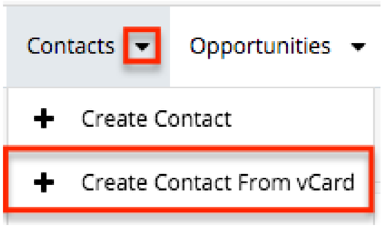


vCards and Contacts

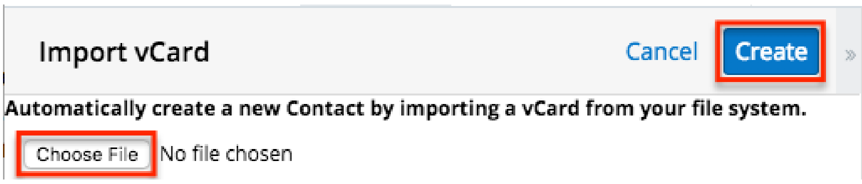
vCards are electronic business cards that are exchanged between applications such as email and web browsers. Contacts may be [created from vCards](#) generated by another application or [saved as vCards](#) for use in other software.

Creating Contacts via vCard

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

1. Click the triangle in the Contacts module tab and select "Create Contact From vCard".


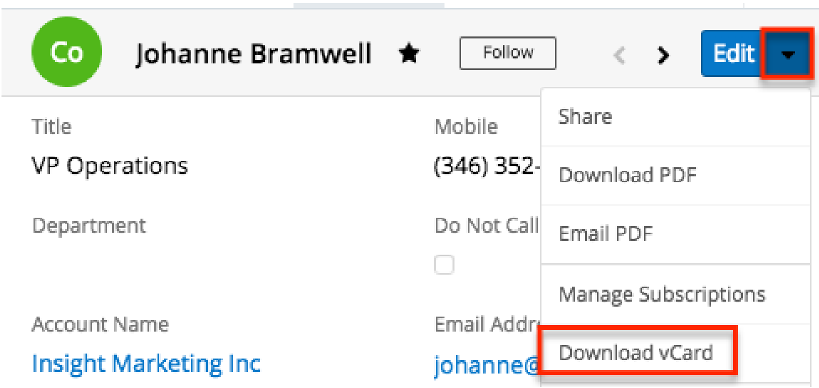
2. Choose the vCard file from your computer and click "Create".



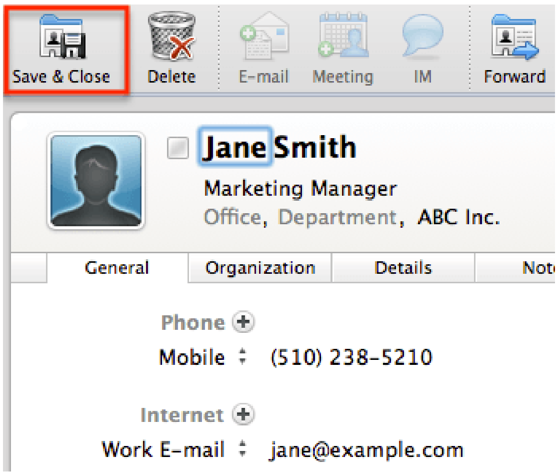
Downloading a Contact's vCard

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

1. Navigate to a Contacts record view.
2. Select "Download vCard" from the Actions menu 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.



Working With Sugar Modules

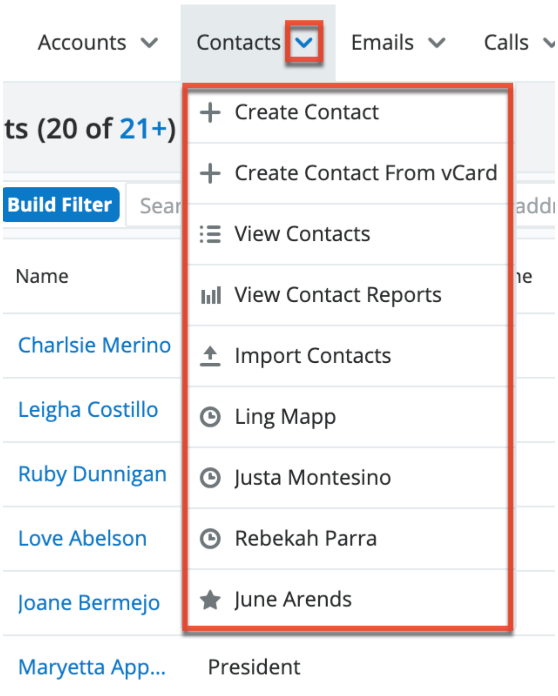
While the Contacts module has some features that only apply to contacts, it also uses the Sidecar user interface that most Sugar modules are based on. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Contact Menus

The Contacts module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Contacts-specific functionality, within this page.

Module Tab Menus

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 click the triangle in the Contacts tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important operations within the module. The Recently Viewed menu displays the list of contacts you most recently viewed. The Favorites menu displays the list of contacts you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Contact	Opens the record 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.

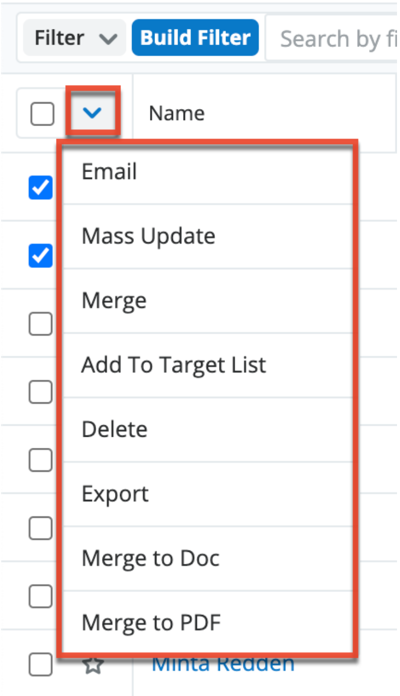
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Contacts list view displays all contact records and allows for searching and filtering to locate specific contacts. You can view the basic details of each record within the field columns of the list view or click a contact's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual contact records or click the checkbox in the list header to select all records displayed on the current set of list view results.



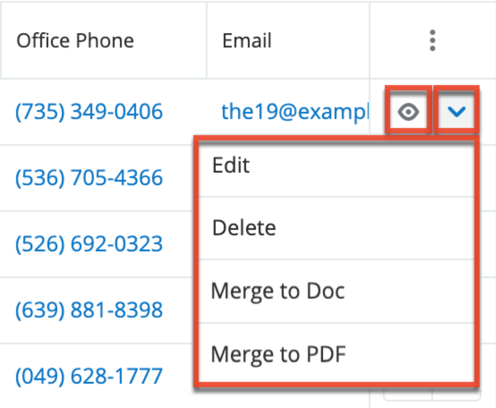
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Email	Email one or more contacts at a time.
Mass Update	Mass update one or more contacts at a time.
Merge	Merge two or more duplicate contacts.
Add to Target List	Add one or more contacts to a target list.
Delete	Delete one or more contacts at a time.
Export	Export one or more contacts to a CSV file.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF

	documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual contact directly from the list view.

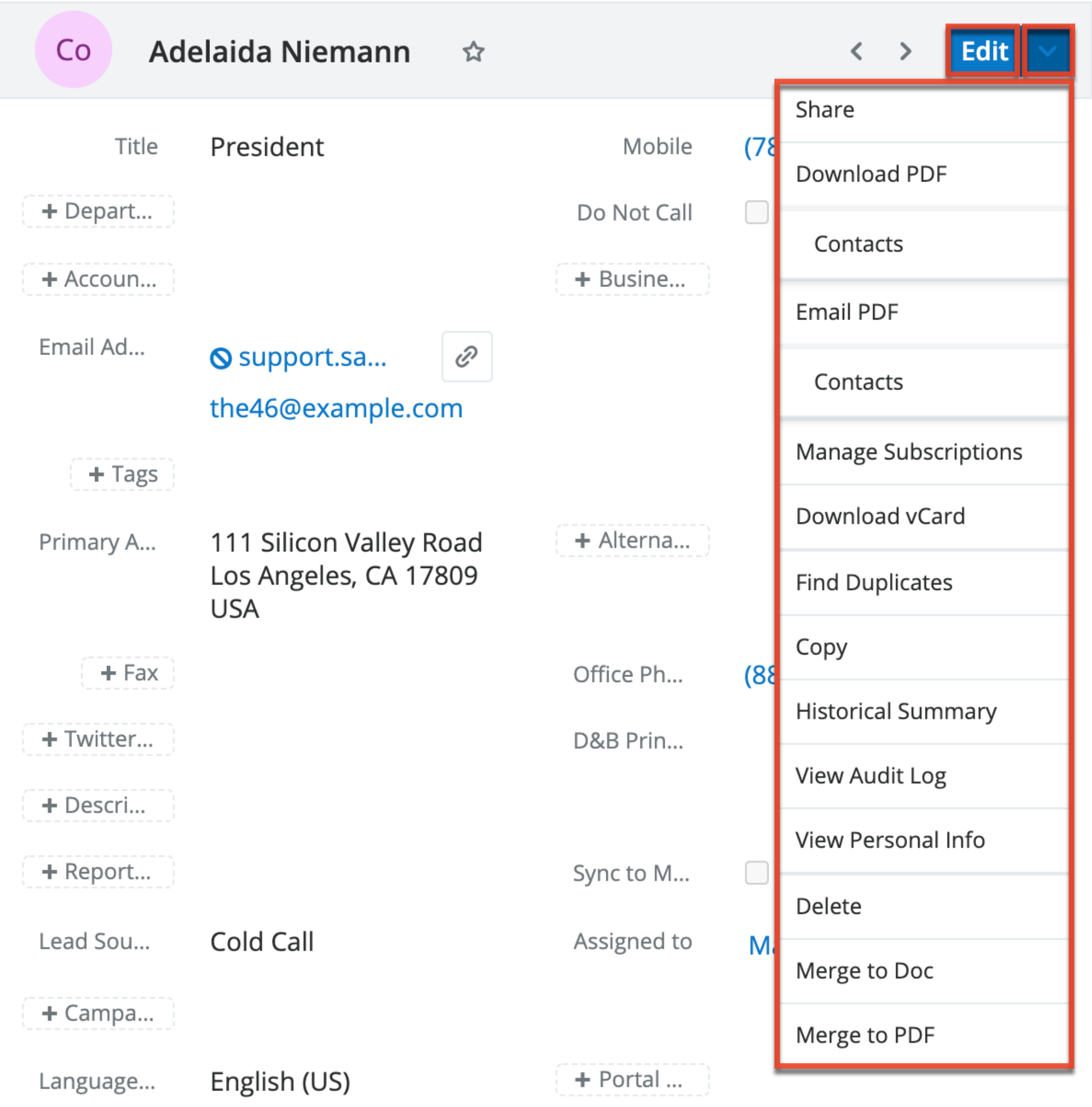


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this contact in the intelligence pane.
Edit	Edit this contact.
Follow	(Available if Activity Streams are enabled) Follow changes to this contact in your activity stream.
Delete	Delete this contact.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Contacts record view displays a single contact in full detail including its fields, subpanels of related records, and activity stream. To access a contact's record view, simply click a hyperlinked contact name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this contact.
Share	Share a link to this contact via email.
Download PDF	Download contact information as a PDF file.

Email PDF	Email contact information as a PDF attachment.
Manage Subscriptions	Manage this contact's newsletter campaign subscriptions.
Download vCard	Download a vCard from Sugar and transfer this contact's information to another application (e.g., Outlook).
Find Duplicates	Locate potential duplicates of this contact.
Copy	Duplicate this contact to create a new contact.
Historical Summary	View a historical summary of activities (e.g., calls, meetings, etc.) related to this contact.
View Audit Log	View a record of changes to this contact.
View Personal Info	Display this record's fields which an admin has designated as personal information.
Delete	Delete this contact.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to contacts.

General Instructions for Working With Sugar Modules	**Contacts-Specific Instructions**
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Contacts-specific help exists for each topic, use the links below to navigate to sections of the current page.

Creating Records	Contact Creation via Sugar Portal Converting Leads to Contacts Creating Contacts via vCard
Viewing Records	
Searching for Records	
List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	
Editing Records	
Deleting Records	
Emailing Records	Emails and Contacts Campaigns and Contacts
Exporting Records	Downloading a Contact's vCard
Recalculating Calculated Values	
Finding Duplicate Records	
Merging Records	
Viewing Record Historical Summaries	
Viewing Record Audit Logs	
Record PDFs	
Favoriting Records	
Following Records	
Sharing Records	

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Accounts

Overview

Sugar's Accounts module consists of companies with whom your organization has a relationship. It is generally seen as the hub for managing and analyzing your business' interactions with each company. Each account record may then relate to other Sugar records such as contacts, meetings, cases, opportunities, and many others as your relationship with the customer matures. This documentation will cover information and actions specific to the Accounts module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting accounts, please refer to the Working With Sugar Modules section of this page.

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.

Account Fields

The Accounts module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role 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 alternate phone. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer. For Sugar Serve users logged in to Amazon Connect, calls are dialed in SugarLive.
Annual Revenue	The company's annual revenue.
Assigned To	The Sugar user assigned to the account.
Billing Address	The account's billing address.
Business Center Name [1]	The business center responsible for managing this account.

	In Sugar Serve, new cases inherit their account's business center which is then used for SugarBPM business hour calculations. For more information, refer to the Business Centers and Accounts section of this page. In Sugar Sell, leads' business centers are used for SugarBPM business hour calculations during lead routing. For more information, refer to the Stock SugarBPM Templates documentation.
Campaign [2]	The campaign, if any, from which the account originated.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
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.
Date of Next Renewal	For instances using revenue line items, the Date of Next Renewal will show the earliest expected close date from all of the account's related revenue line items that meet the following criteria: • Type = "Existing Business" • Service = Yes • Renewable = Yes • Sales Stage is NOT "Closed Won" or "Closed Lost" For more information on renewable services, refer to the Opportunities

	documentation. Please note that this field is hidden from views by default and must be added by an administrator via Studio.
Description	A description or other information about the account.
DUNS	The unique 9-digit number associated with the company in D&B.
Email Address	The account's email address.
Employees	The number of employees at the company.
Escalated	Displayed as a red badge with the text "Escalated" beside the record name in the header and at the top of the preview, this field indicates if the record has an open escalation related to it. If the record is not escalated, the badge is not visible. This field can also be added to other views. See the Escalations page for more details on escalating records.
Facebook Account	The account's Facebook account information.
Fax	The account's fax number.
Google Plus ID	The account's Google Plus ID.
Industry	The industry type to which the company belongs.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
Name	When viewing, the account's name.
Office Phone	The account's office number. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer. For Sugar Serve users

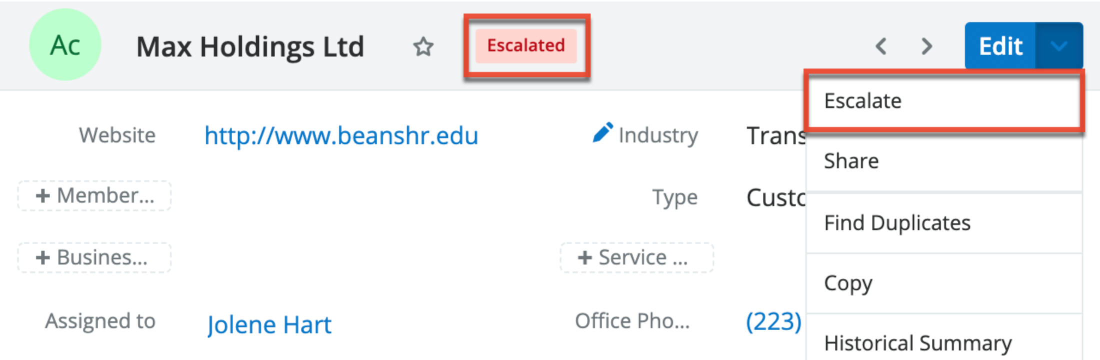
	logged in to Amazon Connect, calls are dialed in SugarLive.
Ownership	Indicate if the company is privately or publicly owned.
Member Of	Designate a parent-child relationship between the account and another account in Sugar.
Rating	The rating for the company compared to other companies in Sugar.
Service Level	The contractual level of service (e.g., Tier 1, Tier 2) for the account which, for Sugar Serve, is used by the stock SugarBPM template to calculate case follow-up dates.
Shipping Address	The account's shipping address.
SIC Code	The Standard Industrial Classification (SIC) code for the account.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the account record.
Ticker Symbol	The stock trading symbol for the company.
Twitter Account	The account's Twitter account information.
Type	The account type (e.g., customer, investor, etc.).
Website	The website URL associated with the account.

[1] This field's value is only visible to Sugar Serve and Sugar Sell users; when this field appears on layouts, users without a supported license type will see a placeholder containing the text "License Required" instead of the field's value. See the User Management page for more details on license types.
[2] This field's value is not visible to Sugar Serve users; when this field appears on layouts, users without a supported license type will see a placeholder containing the text "License Required" instead of the field's value. See the User Management

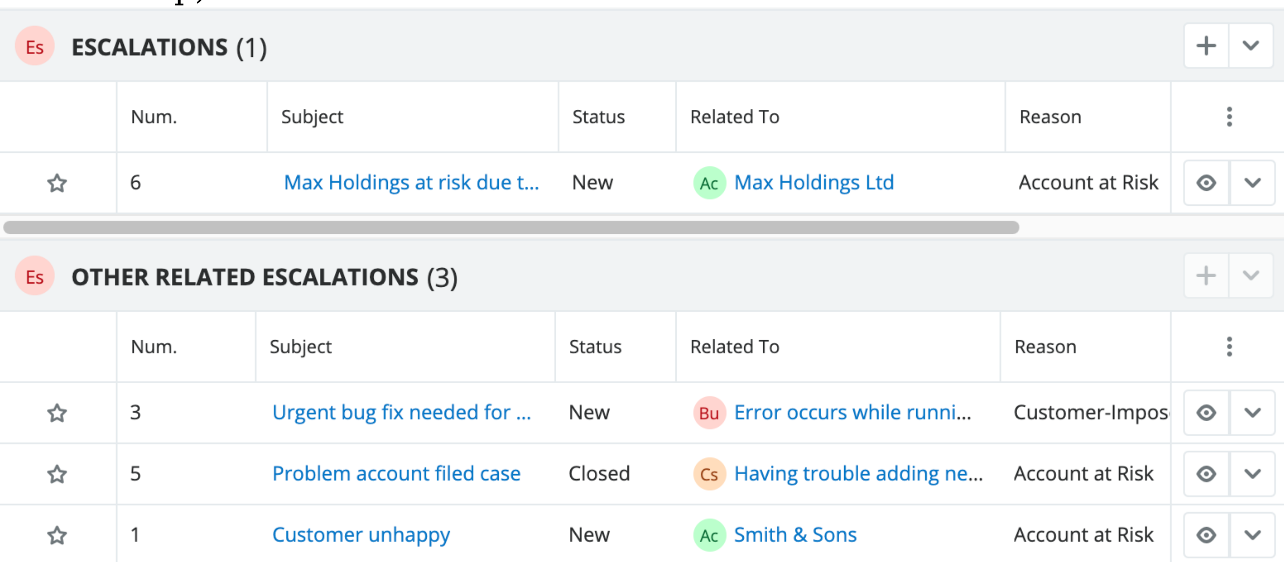
page for more details on license types.

Escalations and Accounts

The Escalations module is used to track the escalation of a specific record, such as an account. Use the Escalate option in the account's record view Actions menu to create an escalation for the account. As long as the account has at least one open escalation in its Escalations subpanel, the Escalated field is displayed as a red badge with the text "Escalated" at the top of record view and the preview. It can also be displayed in the Record View dashlet and list view.



In addition to the Escalations subpanel, the Accounts module has a second subpanel containing escalation records, called "Other Related Escalations"; these two subpanels are used to represent two different relationships between an account and an escalation. The Escalations subpanel contains all escalations with the Related To field set to the currently viewed account (i.e., a one-to-many relationship), whereas the Other Related Escalations subpanel contains all escalations with this account in their Accounts subpanel (i.e., a many-to-many relationship).



When an escalation is created for an account or opportunity, the related account (i.e., the value of the account's Member Of field or the opportunity's Account Name field) is added to the Accounts subpanel on the escalation automatically when the escalation is saved. This means that that escalation will also appear in the account's Other Related Escalations subpanel automatically. Note that if the escalation is then updated to target a different record with a related account, the new account is added but the previous account is not removed.

The following example illustrates the use of the one-to-many and many-to-many escalation relationships: an account may be escalated because the account is at risk of terminating its contract. At the same time, the account may be invested or interested in the escalation of a particular bug that has greatly impacted its users. The account-at-risk escalation would be displayed in the Escalations subpanel because the account itself is escalated. The bug escalation would be displayed in the Other Related Escalations subpanel because the account is not the record that is escalated, but it does need to be related to the bug escalation indirectly; this allows the person working on the bug escalation to be fully aware of how many customers are impacted and may require communication as progress is made.

While the Related Type field is not displayed by default in the Other Related Escalations subpanel, you can enable it using the three-dots menu on the right side to easily see and sort by the type of record that is escalated. See the Escalations page for more details on how escalations work.

Business Centers and Accounts

Business centers, available exclusively to Sugar Serve and Sugar Sell users, represent your company's centers of operation and specify a time zone, operating hours, and holidays so that a concept called "Business Hours" can be leveraged in SugarBPM. Each account's selected business center can be used for SugarBPM business hour calculations.

Sugar Serve's stock SugarBPM template uses each case's business center which is inherited from the case's account at the point of creation. If your organization does not wish to specify various business centers on accounts and cases, the stock templates can be modified to use a static business center. Refer to the Getting Started With SugarBPM for Sugar Serve and Stock SugarBPM - Case Follow-Up Date Management articles for help configuring the stock template and your instance to work together.

Sugar Sell's stock lead-routing SugarBPM template uses each account's business center for task due-date calculations using business hours. For more information, refer to the Stock SugarBPM Templates documentation.

Once business centers have been set up by an admin or Business Center Administrator, Sugar Serve and Sugar Sell users can simply select the appropriate business center in the Business Center Name field on the account record. For more information on creating and configuring business centers, refer to the Business Center Management documentation.

Emails and Accounts

Accounts include an email address which can be used to email the account as a recipient. The methods for doing so are covered in the Emailing Records section of the User Interface documentation. Accounts may also be recipients of campaigns that allow you to send email messages to a large group of recipients as well as to track the results of that message. Please refer to the Campaigns and Accounts section of this page for more information. In addition to being a recipient or sender of an email, accounts may be related to emails by being selected in the email's Related To field. These relationships allow the account to display all relevant email correspondence in the Emails subpanel and History dashlet on an account's record view. An account's Emails subpanel and History dashlet may also display emails belonging to the contacts related to the account.

Emails Subpanel

The Emails subpanel in the Accounts module displays emails which are associated with the account record in a variety of ways:

- **Explicitly related to the account**: If the account is selected in the email's Related To field, the email and account are explicitly related, and the email will appear in the account's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the Emails documentation.
- **Implicitly related to the account**: If one of the account's email addresses appears in the email's From, To, or Cc fields, the email and account are implicitly related, and the email will appear in the account's Emails subpanel and History dashlet. 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.
- **Related to the account's related contacts**: If the email is related, either

explicitly or implicitly, to a contact record that belongs to the account, the email will appear in the account's Emails subpanel and History dashlet.

  - **Note**: Administrators can enable or disable an account from displaying related contact emails via Admin > Related Contacts Emails. For more information, please refer to the Emails documentation in the Administration Guide.

For more information on working with subpanels, please refer to the User Interface documentation.

Campaigns and Accounts

Sugar's Campaigns module can be used to send mass emails or a series of newsletter emails to Sugar accounts, contacts, leads, and targets. The results of each campaign are recorded to measure its impact. Accounts are not related directly to campaigns. Rather, each campaign is related to several target list records, and each target list is related to accounts and other recipients. To send a campaign email to an account, the account should belong to a default-type target list associated with the campaign. To prevent an account from receiving emails from a campaign, the account should belong to the campaign's suppression list-type target list. Once a campaign is sent, the results specific to a particular account will appear in the Campaign Log Subpanel on the account's record view as described in the Campaign Log Subpanel section of this page.

Accounts can be added to target lists via the target list record itself or from the Accounts list view as described below. For instructions on other available methods of adding to target lists, please refer to the Target Lists documentation.

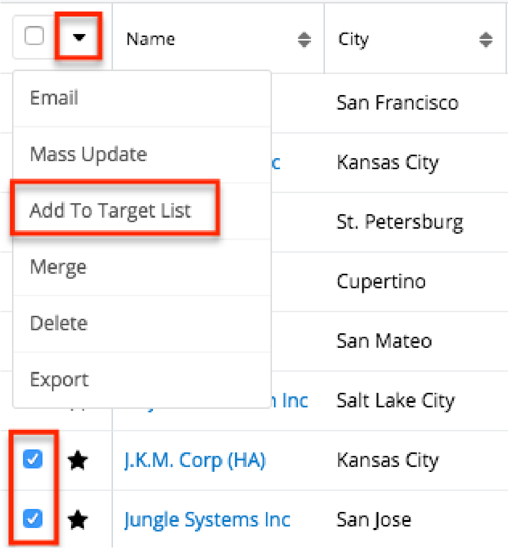
Adding to a Target List via Accounts List View

A target list consists of a group of individuals or organizations you wish to be included in or excluded from 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 Mass Actions Menu. For more information on target lists and other methods of adding accounts, please refer to the Target Lists documentation.

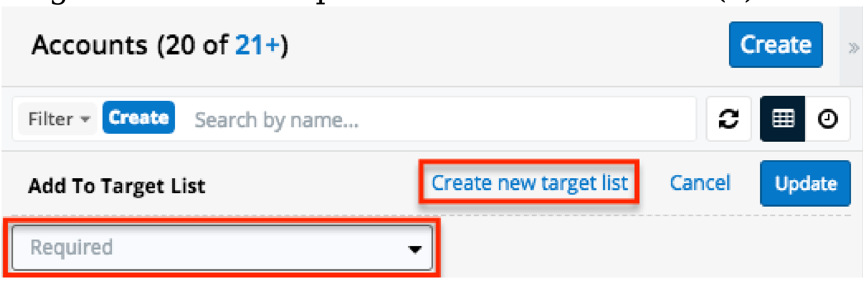
You can use the Select All feature in the list view when adding to a target list, which will allow you to easily select the first 1000 records in the result set. If you wish to add more than 1000 records or add a specific group of records to the target list, please use the filter option in the list view search to perform the additions in smaller batches.

Use the following steps to add accounts to a target list via the Accounts list view:

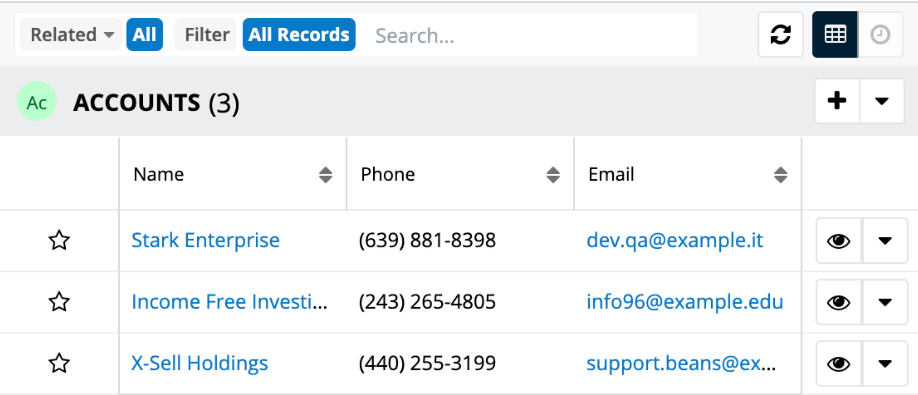
- Navigate to the Accounts list view by clicking the Accounts module tab.
- Use the List View Search to find the Account records you wish to add to a target list.
- Select the desired account records then choose "Add to Target List" from the Mass Actions menu.



- Below the search bar, locate and select the desired target list in the dropdown list or click "Create new target list" to add the accounts to a new target list. Click "Update" to add the record(s) to the 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 open the record view, and you will see the account records within the Accounts subpanel.



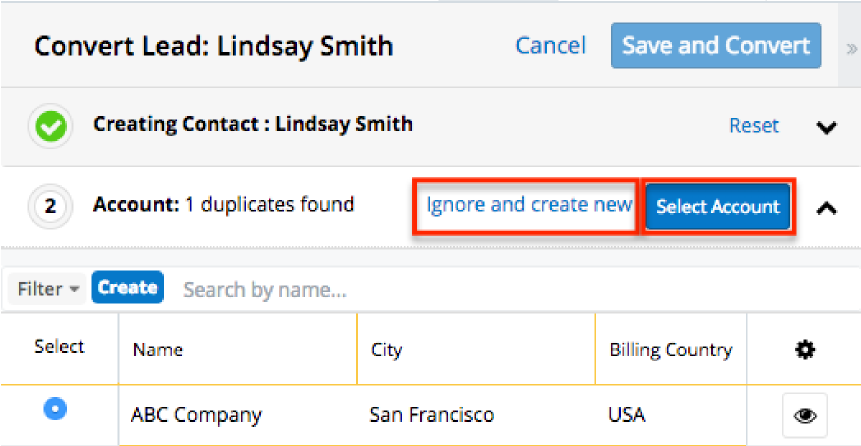
Campaign Log Subpanel

The Campaign Log subpanel contains historical information regarding an account'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 Campaign Log subpanel on the account's record view. 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 to a Target List via Accounts List View section of this page. For more information on campaigns, please refer to the Campaigns documentation.

For more information on working with subpanels, please refer to the User Interface documentation.

Leads and Accounts

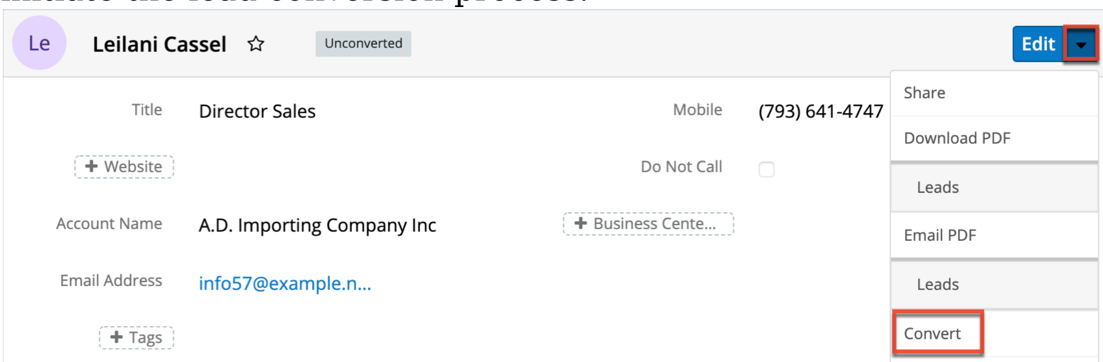
Once a lead has been evaluated and qualified, it can be converted into an account in addition to a contact and opportunity. Please note that Sugar automatically checks for any duplicate records in the system when converting the lead. The Convert Lead page will display any records that are detected as duplicates in a list view within the module panels (e.g., Account). You can either select the existing record or create a new record as necessary. For more information on lead conversion and creating new records, please refer to the Leads documentation.



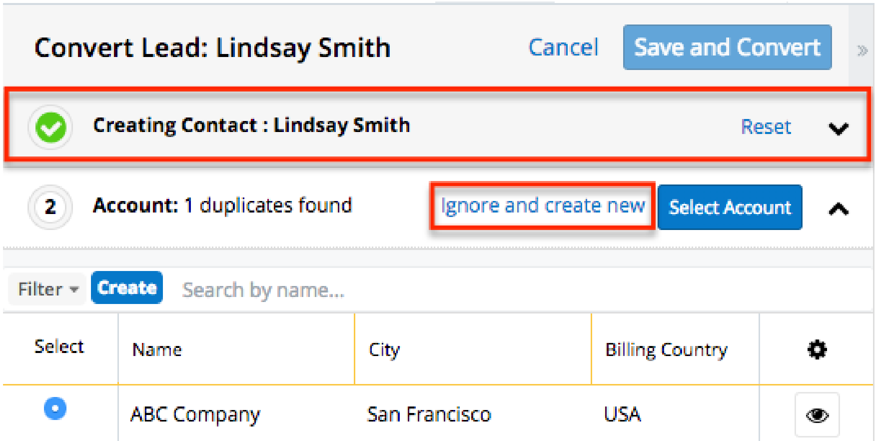
Creating via Lead Conversion

Sugar enables you to create a new account record during the lead conversion process. For more information about lead conversion, please refer to the Leads documentation.

Use the following steps to create an account during lead conversion:

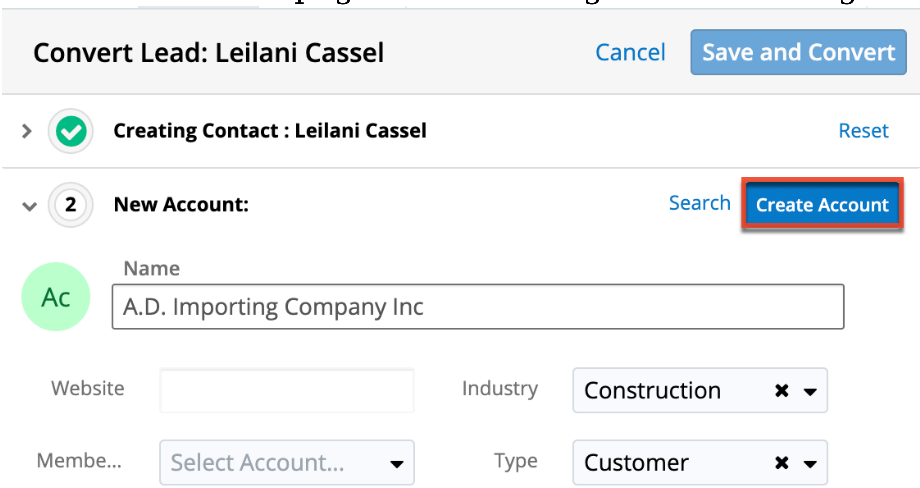
- Navigate to a Leads record view.
- Select "Convert" from the Actions menu or click the Unconverted button to initiate the lead conversion process.


- If there are no duplicate records found for a module (e.g., Contacts) in lead conversion, the new record will be automatically marked for creation on the Convert Lead page and related to the lead. The panel will be collapsed as well, but you can click the header to open the panel and view the record's details.
- If there are duplicate records found for a module (e.g., Accounts), you can either select an existing account or create a new account record if none of the suggested duplicates are valid. Click "Ignore and create new" to create a new account record.

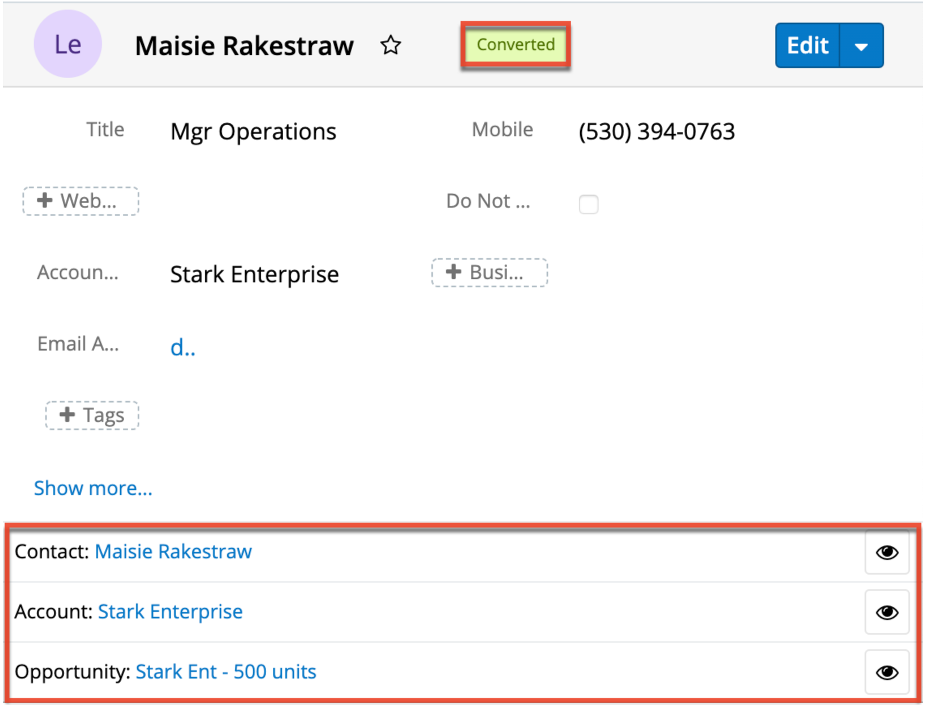


- Some of the fields (e.g., address, phone, etc.) on the displayed record view will be pre-populated with the lead's values. Simply update any necessary fields then click the Create Account button.

Note: You can click "Save and Convert" at the top of the page if you wish to convert the lead at this point. However, if you wish to create or relate an opportunity record to the lead as well, please complete the Opportunity panel on the Convert Lead page before saving and converting.



Once the lead has been converted successfully, the lead's record view will display the converted contact, account, and opportunity information below the record's detail. You can click the Preview icon to the far right of each record's row to view the details of the converted account and other records.



Working With Sugar Modules

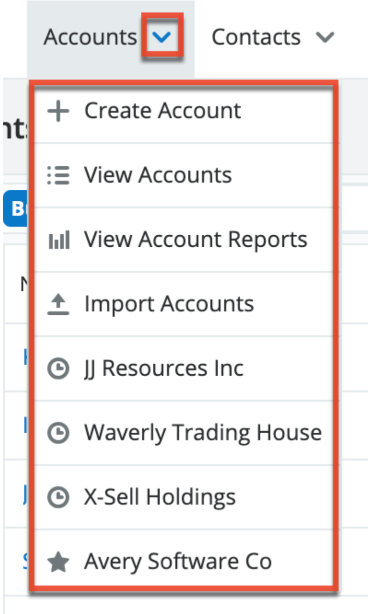
While the Accounts module has some features that only apply to accounts, it also uses the Sidecar user interface that most Sugar modules are based on. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Account Menus

The Accounts module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Accounts-specific functionality, within this page.

Module Tab Menus

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 click the triangle in the Accounts tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important operations within the module. The Recently Viewed menu displays the list of accounts you most recently viewed. The Favorites menu displays the list of accounts you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Account	Opens the record 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.

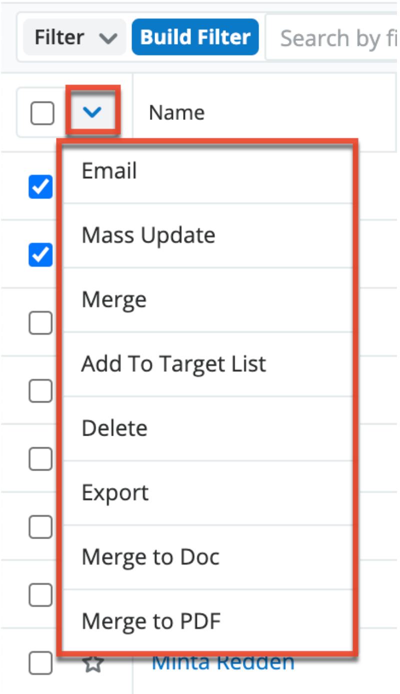
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Accounts list view displays all account records and allows for searching and filtering to locate specific accounts. You can view the basic details of each record within the field columns of the list view or click an account's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual account records or click the checkbox in the list header to select all records displayed on the current set of list view results.



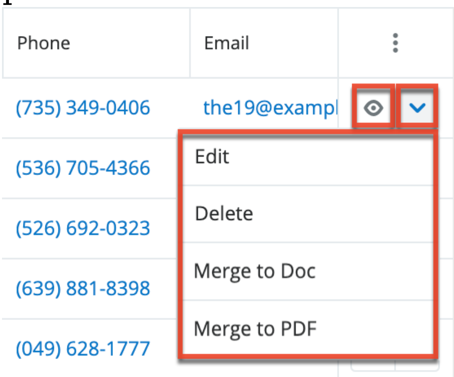
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Email	Email one or more accounts at a time.
Mass Update	Mass update one or more accounts at a time.
Merge	Merge two or more duplicate accounts.
Add to Target List	Add one or more accounts to a target list.
Delete	Delete one or more accounts at a time.
Export	Export one or more accounts to a CSV file.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.

Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual account directly from the list view.



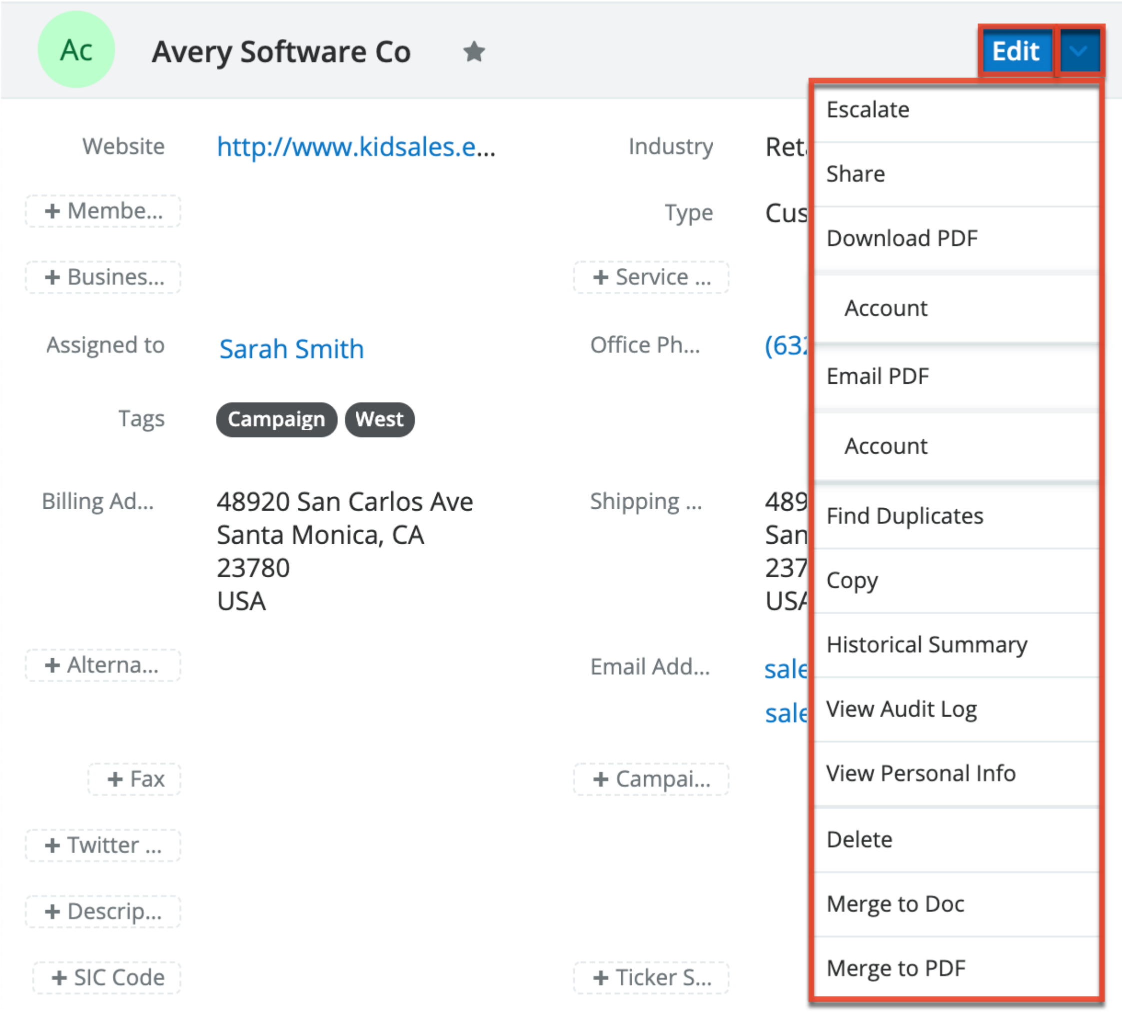
The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this account in the intelligence pane.
Edit	Edit this account.
Follow	(Available if Activity Streams are enabled) Follow changes to this contact in your activity stream.
Delete	Delete this account.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF

	documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Accounts record view displays a single account in full detail including its fields, subpanels of related records, and activity stream. To access an account's record view, simply click a hyperlinked account name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this account.
Escalate	Create an escalation record related to

	the current record.
Share	Share a link to this account via email.
Download PDF	Download account information as a PDF file.
Email PDF	Email account information as a PDF attachment.
Find Duplicates	Locate potential duplicates of this account.
Copy	Duplicate this account to create a new account.
Historical Summary	View a historical summary of activities (e.g., calls, meetings, etc.) related to this account.
View Audit Log	View a record of changes to this account.
View Personal Info	Display this record's fields which an admin has designated as personal information.
Delete	Delete this account.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to accounts.

General Instructions for Working With Sugar Modules	**Accounts-Specific Instructions**
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Accounts-specific help exists for each topic, use the links below to navigate to sections of the current page.

Creating Records	Creating via Lead Conversion
Viewing Records	
Searching for Records	
List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	
Editing Records	
Deleting Records	
Emailing Records	Emails and Accounts Campaigns and Accounts
Exporting Records	
Recalculating Calculated Values	
Finding Duplicate Records	
Merging Records	
Viewing Record Historical Summaries	
Viewing Record Audit Logs	
Record PDFs	
Favoriting Records	
Following Records	
Sharing Records	

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Emails

Overview

Sugar's Emails module stores copies of email messages that have been sent from or archived to Sugar. While Sugar is not primarily an email application, it does allow users to send email using their personal email address, a shared email account, or a system account and to archive copies of messages and attachments sent or received through a third-party email application.

This documentation will cover how to send and archive email messages and how to use the following modules:

- Emails
- Email Signatures
- Email Templates
- Outgoing Email Accounts

In the Email Signatures, Email Templates, and Outgoing Email Accounts modules, you can view only the records that you have created with the exception of the system email account, which may be visible in the Outgoing Email Accounts list view. In the Emails module, you can search for and view emails that you have archived to Sugar or that have been archived by other users as allowed by your team membership, user access type, and assigned roles. Emails that are in a Draft status can only be seen by the created-by user and administrators. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration Guide.

Note: There are three types of outgoing email accounts in Sugar: system, user, and default user. This document focuses primarily on the user email account and the default user email account. For more information about the system email account and additional details on administering user email accounts, please refer to the Email documentation in the Administration Guide.

Sending and Receiving Email in Sugar

Sending Email

Emails sent from Sugar are automatically archived in Sugar and related to records that match the email addresses in the message. To send emails through Sugar, users must configure their default user email account via Email Settings, unless the administrator has enabled the "Allow users to use this account for outgoing email" option. Users may add additional outgoing email accounts (e.g., work email, home email, school email).

If the Administrator chooses to allow users to send email using the system email account by enabling the "Allow users to use this account for outgoing email" option in Admin > System Email Settings (this is not common), users will not be able to configure their default email account and must instead utilize the system email account or create a new user email account. Users will see the system email account in the Outgoing Email Accounts list view with an asterisk to indicate that it is a system account.

Receiving Email

Because Sugar is not an email application, users cannot receive email directly to Sugar via their user email accounts. Instead, users must archive emails they receive using one or more of the techniques listed in the Archiving Emails section of this page.

Emails

The Emails module contains email records, which are copies of the emails that have been sent from or archived to Sugar. Users can view, sort, filter, and favorite email records according to their team and role memberships even if the emails have been sent or archived by a different user.

For basic use and navigation of the emails module, please refer to the Working With Sugar Modules section, which contains links to the User Interface documentation for behaviors that are common among most Sidecar modules. More information is available on email-specific functionality such as sending, replying, archiving, and composing emails in the sections under the Composing Emails header below.

Email Fields

The Emails module contains the following fields. For information on using and editing various field types, refer to the User Interface documentation.

Field	Description	Notes
Assigned To	The Sugar user assigned to the email record.	By default, the Assigned To user is the user who creates and sends the message. For messages saved as drafts, the Assigned To user is the only users who will be able to edit and send the draft later.
Attachments	Any attachments included with the email.	For more information, please refer to the Adding Attachments section of this page.
Body	The content of the email	There is no label for this

	message.	field in the application. The body of your message is composed in the TinyMCE text editor window. For more information on how to use the text editor, please refer to the User Interface documentation in the Application Guide. **Note**: To embed images directly into the email message, you can copy and paste the image source/image data or drag and drop the image into the body of the email.
Date	The date the message was sent, received, or modified, depending on the email's status and direction.	• **Archived (incoming)**: The date the email was received • **Archived (outgoing)**: The date the email was sent • **Draft**: The last modified date
Direction	The direction (e.g., Outbound, Inbound, Internal, Unknown) of the email based on the sender and recipient(s) in the email message.	Not visible on record views or as a list view column, the Direction field is available only as an available filter field in the Emails list view. For more information on filtering the Emails list view using the Direction field, refer to the Email's Direction Field. **Note**: Draft emails will have a direction of "Unknown".
From	The email address that the email was or will be sent from.	This field shows your available outgoing email accounts and determines the From name and From

		address that the recipient(s) will see. **Note**: The Emails list view can be filtered using the From field to locate emails from a particular sender.
Inbound Account	The incoming email account that received the email.	Not visible on record views, the Inbound Account field is available only for filtering the Emails list view.
Number of Attachments	An integer representing the number of individual files that are related to the email record as attachments.	Not visible on record views or as a list view column, the Number of Attachments field is available only as an available filter field in the Emails list view.
Recipient Fields	The fields that contain email addresses of the email recipients.	• **To**: The email address(es) that the email was or will be sent to • **Cc**: The email address(es) that the email was or will be copied to • **Bcc**: The email address(es) that the email was or will be blind copied to For more information, please refer to the Working With Recipient Fields section of this page. **Note**: The Emails list view can be filtered using the To, CC, or Bcc fields to locate emails from certain recipients.
Related To	The module and record that is related to this email.	The email will be listed in a subpanel under its "Related To" record.

Status	The state of the message: • **Archived**: The message has been sent or received. The message may have been sent through the Sugar application or synchronized to Sugar from an external email client such as Microsoft Outlook. • **Draft**: The message has not yet been sent from Sugar. Email records in a draft state are only visible to the email's assigned user and the administrator.	Sugar does not differentiate between sent and received emails via the Status field, but users can find messages by direction by filtering the Emails list view using the Direction field.
Subject	The subject line for the email message.	
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports.	For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) whose users have access to the email record according to their role permissions.	

Archiving Emails

When a copy of a sent or received email message is stored in Sugar, it is considered an archived email. Users cannot edit an email's content, dates, or recipients once it has been archived. Users with appropriate role permissions can, however, edit the Assigned To, Teams, Related To, and Tags fields for archived emails.

Note: Assignment notifications, password-reset emails, scheduled reports, and SugarBPM emails sent from Sugar will not be stored in Sugar as archived emails.

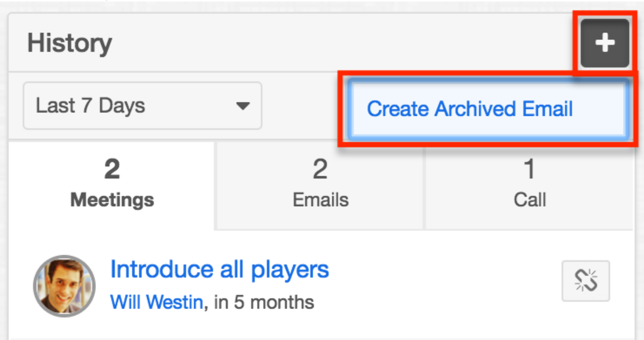
There are several ways that emails may be archived in Sugar, including:

- Manually creating an archived email via "Create Archived Email"
- Composing and sending an email from Sugar via the Emails module
- Sending an email campaign via the Campaigns module
- Receiving a message to a Group Inbound Email account in Sugar
- Archiving emails via the Sugar Email Archiving service (a.k.a. "SNIP")
- Archiving emails via a connector, third-party application, or API (e.g., Sugar Connect)

Note: When an email record is archived to Sugar, the service that imports the email may set the Teams field for the email record. If the team is not set at the time of archive, the email's team will default to "Global". Users with the appropriate permissions may update the Teams field after the email has been archived in Sugar.

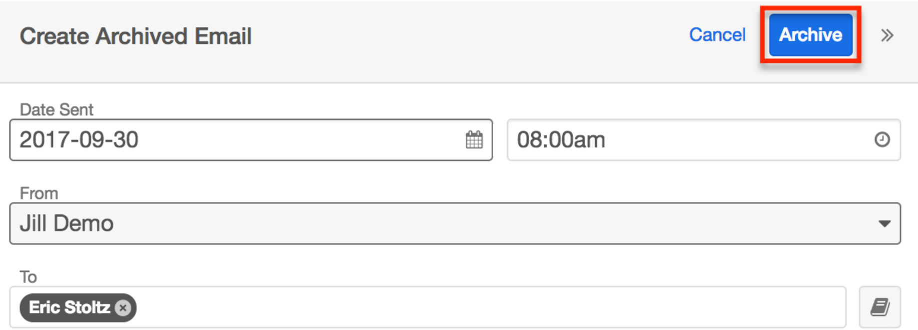
Manually Creating Archived Emails

Users who do not have an email account configured in Sugar or who would like to log an email that was not automatically archived can manually create copies of email messages for archival purposes. To create an archived email in Sugar, navigate to the Emails module and select "Create Archived Email" from the Emails module tab menu. Alternatively, navigate to the record that you would like to relate to the archived email and select "Create Archived Email" from the record's History dashlet.



The email composer window will open where you can manually copy the contents of an email you have already sent or received outside of Sugar. When creating an archived email, the Send button is hidden. Instead, there is an Archive button, which allows the user to log the message without actually transmitting it.

In addition to completing the standard email fields, indicate the date and time that the email was sent or received in the fields labeled "Date Sent". After copying the contents of the message you want to archive, click the "Archive" button to save the record in Sugar.



Please note that, like other archived emails in Sugar, you cannot edit the message's content, dates, or recipients once it has been archived. Users with appropriate role permissions can, however, edit the Assigned To, Teams, Related To, and Tags fields for archived emails.

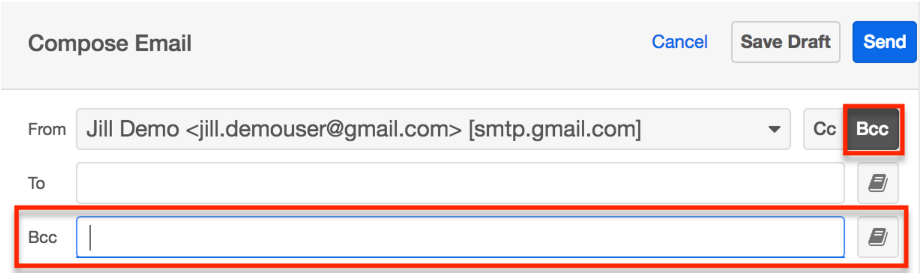
Composing Emails

There are several places in Sugar where you may create an email message, but this section focuses on the composition elements of the email message such as recipients, attachments, templates, and signatures. For more information on places you can create emails in Sugar, please refer to the User Interface documentation.

Working With Recipient Fields

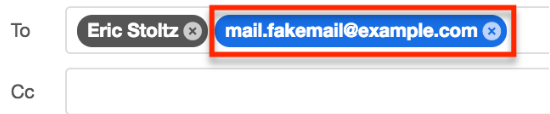
Sugar allows multiple recipients for an email message using the To, Cc, and Bcc fields. To send a message, at least one of the three recipient fields must contain at least one valid recipient. For example, a user may send a message with recipients in only the Bcc field if they want to hide the recipients' email addresses from each other.

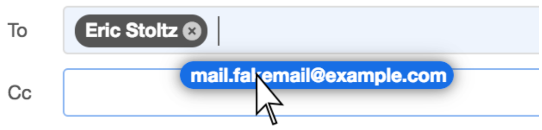
To include Cc or Bcc recipients, click the "Cc" or "Bcc" button to expand the recipient field. You can click the buttons again to hide them or simply click another area of the record such as the Body or Subject field.



Note: When composing email messages via Quick Create, Sugar will automatically hide the recipient form fields and populate the message's "To" and "Related To" fields with the name and email address of the record you are viewing. To edit or override the default recipient, click directly on the hard-coded name above the Subject field and the area will transform into the standard From/To/Cc/Bcc form seen in the image above. For more information, please refer to the User Interface documentation.

You can type email addresses directly in the recipient fields or look up recipients in the Address Book. For more information, please refer to the Freehand Address Entry and Using the Address Book sections of this page. When adding recipients, keep in mind the following tips for working with recipient fields:

- To select a recipient, click the recipient's pill in the recipient field and it will turn blue to indicate that it is in a selected state.


- To select multiple recipients within the same field, hold down the Shift or Command key then click the desired recipient pills.
- To move one or more recipients between the To, Cc, and Bcc fields, select the recipient(s) and drag your selection from one field to the other.


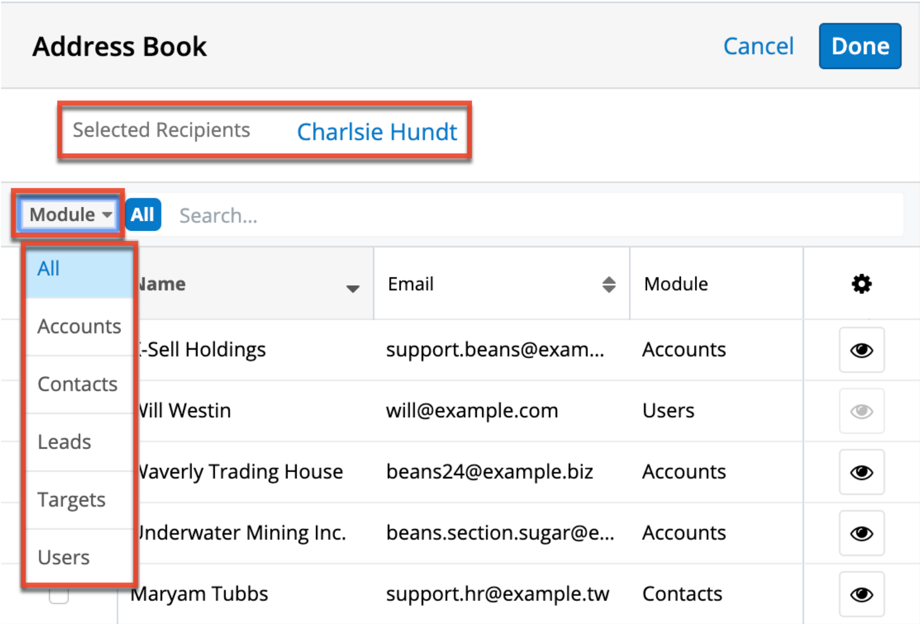
- To remove recipients from the message altogether, click the x inside the recipient's pill or select the recipient(s) and press the Delete key on your keyboard.
- To deselect recipient(s), click the blank space inside the field.

Using the Address Book

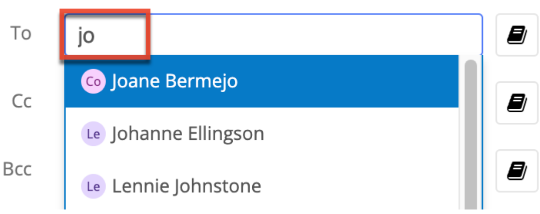
You can search across modules using the Address Book in the Emails module, which aggregates the users, contacts, leads, targets, and accounts in Sugar that have at least one valid email address.

To access the address book, click on the address book icon next to the recipient field you are working with.

You can search for and select multiple recipients from the Address Book and filter the Address Book's list view to restrict results to a specific module such as contacts or users.



You can also tap into the Address Book by typing a first name, last name, email address, or account name directly in any of the recipient fields on the email message. Sugar will find potential matches as you type and you can select the correct recipient from the suggestions. Each matching recipient option will display a badge that indicates which module contains the record (e.g., "Le" for Leads).



Freehand Address Entry

In addition to using the address book, you may choose to click inside any of the recipient fields and type one or more email addresses freehand. Email addresses do not need to be stored in Sugar to be used as email recipients. If an email address already exists in the database, then Sugar will find it as you type and you can select it from the suggestions. If the email address is not yet stored in the database, then simply hit the Enter key to commit the new address to the recipient field.

Note: Sugar validates email addresses on-the-fly and warns the user when an invalid email address has been entered.

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. Any user who has permission to view the email record can also access attachments for the message. To include an email attachment, simply click on the Attachment icon in the toolbar:

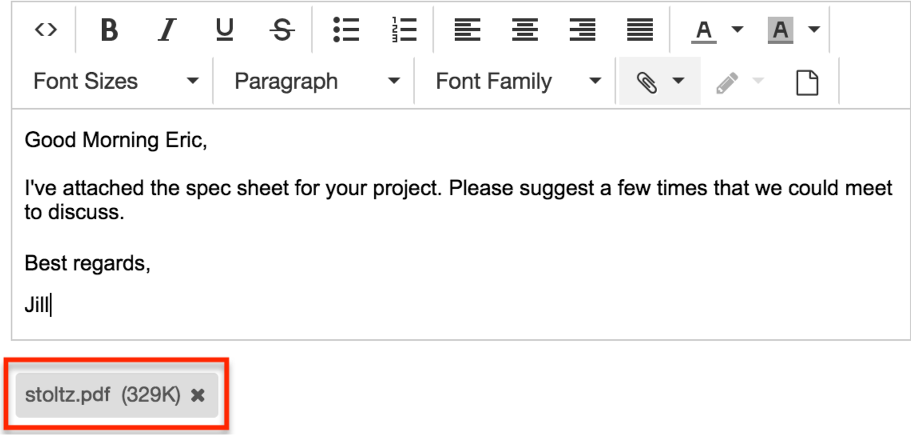
Note: To embed images directly into the email message, you can copy and paste the image source/image data or drag and drop the image into the body of the email.

The Attachment menu provides two options:

- **Upload From Local**: Opens your system's file navigator so you can find and attach a file that is saved on your computer. Hold the Shift or Ctrl key while selecting files to select and attach multiple files at once.
- **Sugar Document**: Opens the Search and Select screen so you can search for a file in Sugar's Documents module.

Note: File attachments from your computer are stored in the Notes module, so you must have permission to create notes to upload attachments. If you do not have permission to create notes, the Attachment option will be hidden. Similarly, users who do not have role permission to view records in the Documents module will not see the "Sugar Document" attachment option. For more information on configuring roles in Sugar, please refer to the Role Management documentation in the Administration Guide.

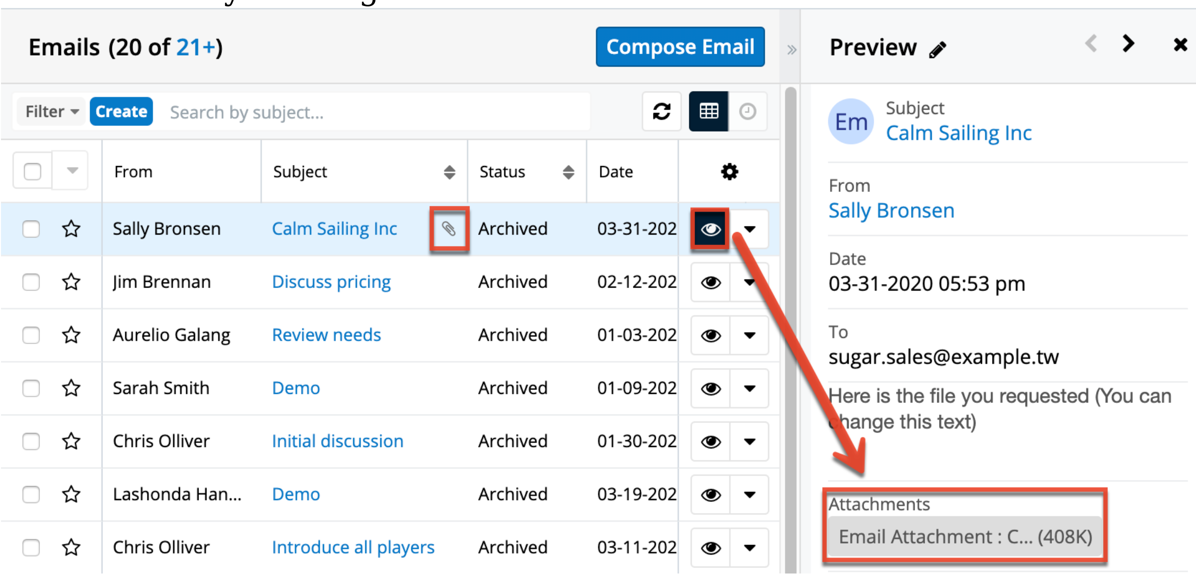
After selecting the documents you want to attach to the message, they will appear under the body field of the email message.



Each attachment will display an approximate file size in parentheses next to the file name. If the file you are attaching exceeds or causes the total size of attachments on the message to exceed the system's maximum upload size, the attachment will fail to upload. For more information on configuring the system's maximum upload size, please refer to the System documentation in the Administration Guide.

To remove an attachment before sending a message, simply click on the x next to the attachment's name.

When viewing draft and archived emails in list view, a paper clip icon next to a record's subject will indicate that the email contains one or more attachments. You can download an archived email's attachments from the email record's preview or record view by clicking on the file name.



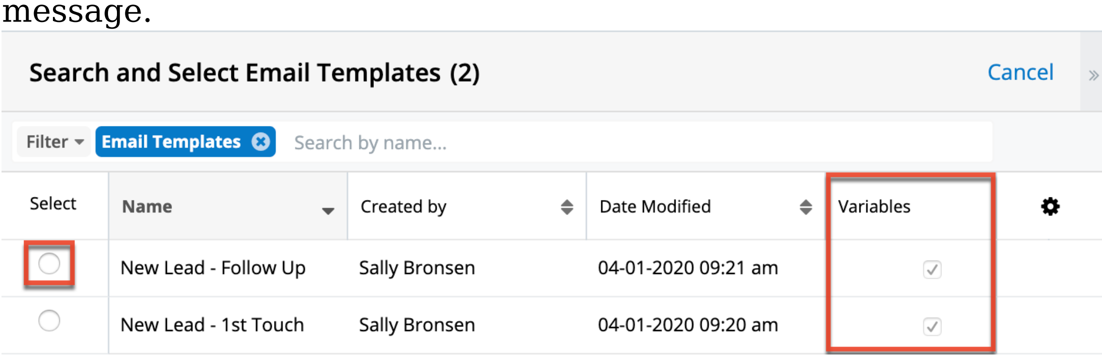
Using a Template

Email templates can save time and reduce errors when composing common email messages. For more information on how to create an email template, please refer to the Email Templates section of this documentation.

As a best practice, send templates that contain variables to a single recipient only. If the template has any variable fields defined in it (i.e., $contact_name), Sugar will replace the variables with corresponding values from a related record. If multiple records share the same email address or multiple recipients are on the email, Sugar will pick only one of the record's values to place in the email template to send to all of the email addresses. If no related record is found, Sugar will warn you that the variable fields will be blank before you send the message. For more information on how to send a dynamic variable to many recipients, please refer to the Campaigns documentation in the Application Guide.

To use an email template, compose a new email message and click on the Template icon in the toolbar before completing any other fields on the email.

After clicking the Template icon, the Search and Select window will appear where you can find the appropriate template for your message. Select the radio button next to the template to pull all of its content and any attachments into your current message.



Note: If the body or subject of the email contains any data before a template is selected, the body and subject will be removed and replaced with the template data. Similarly, if the message contains an attachment, the attachment will be removed and replaced with any attachments that the template may contain.

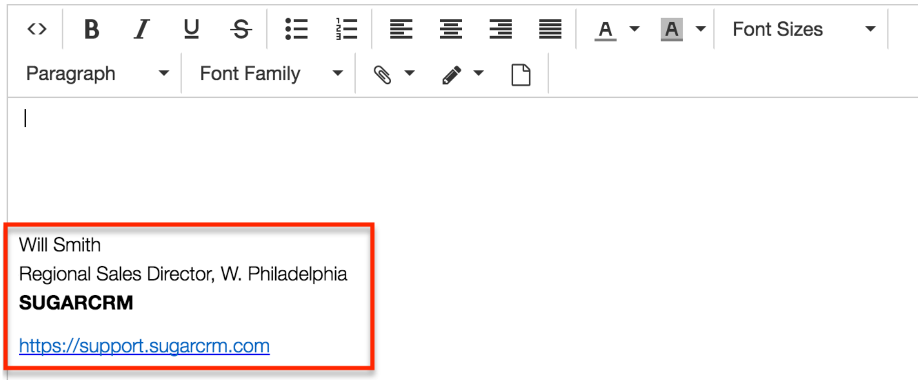
Once an email template has been inserted in the email editor, users are free to edit the subject and email body, add or remove [attachments](), and insert a [signature]() on the message.

Using an Email Signature

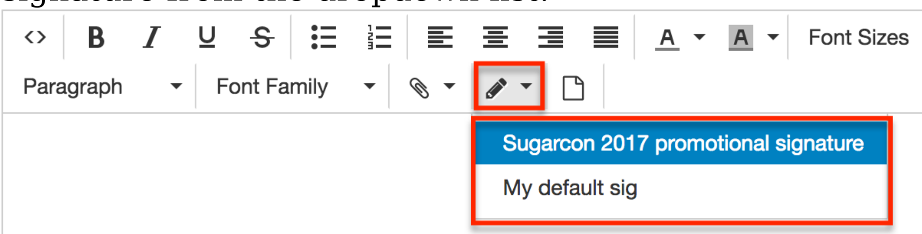
Email signatures are an easy way to standardize the messages you send with your contact details or other messaging. For more information on how to create an email signature, please refer to the Email Signatures section of this documentation.

Follow these steps to choose an email signature for a message:

1. First, create a new email or edit a saved draft.
    - If you have created a default signature, it will automatically appear in the body of the message and you can simply type your message above the signature.

    - If you have not designated a signature as default or if you would like to select a different signature, continue to step 2.
2. Place your cursor inside the body of the message where you want the signature to appear.
3. Click on the Email Signature icon in the toolbar and select your preferred signature from the dropdown list.

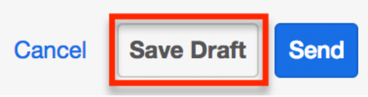
   

To remove a chosen signature, simply select another signature to replace it. If you decide to use no signature at all after a signature has been added to the composer, you must delete it manually in the composition window.

Note: The Email Signature button is disabled when the cursor is not in the body of the email composer field and when there are no signatures defined for the user.

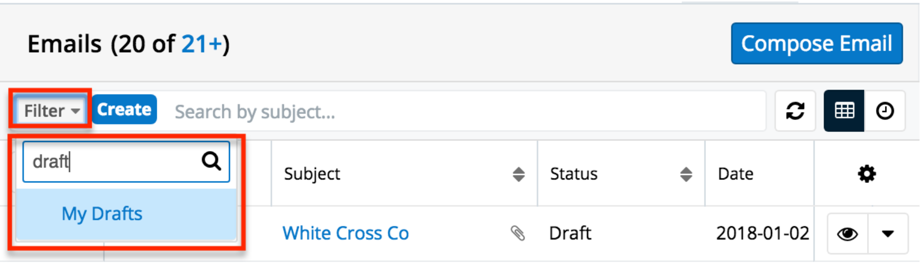
Saving and Editing Draft Emails

To save a draft of an email that you do not want to send right away, simply start composing a new email message and click "Save Draft" instead of using the Send button. Any content, recipients, templates, and signatures used in the email are saved with the draft. Only the administrator and the Assigned To user can view and edit emails in a Draft status.



Note: Draft emails cannot be re-assigned to another user, so mass updating the Assigned To field for emails will not re-assign drafts if they are selected.

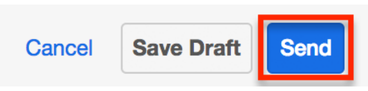
Users can only access the draft emails that they have created. A user's drafts appear alongside archived emails in the Emails list view and can be isolated in list view using the "My Drafts" filter.



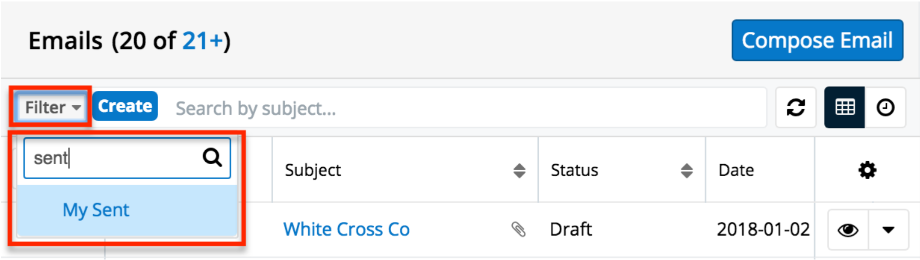
Click on the subject of a draft email to launch the Compose Email screen where the email's assigned user can continue editing the email and save the email as a draft again or send the email, which will change the email's status to "Archived".

Sending Emails

To send an email to the recipients in an email's To, Cc, and Bcc fields, simply click the Send button.

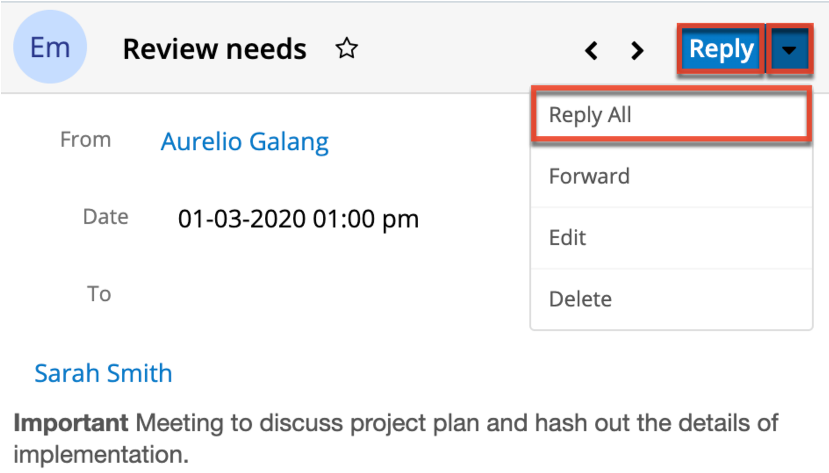


Sent emails will use the settings configured for the From account to send the email. A copy of the sent email will be saved to Sugar as "Archived" in the Emails module and can be isolated in list view using the "My Sent" filter.

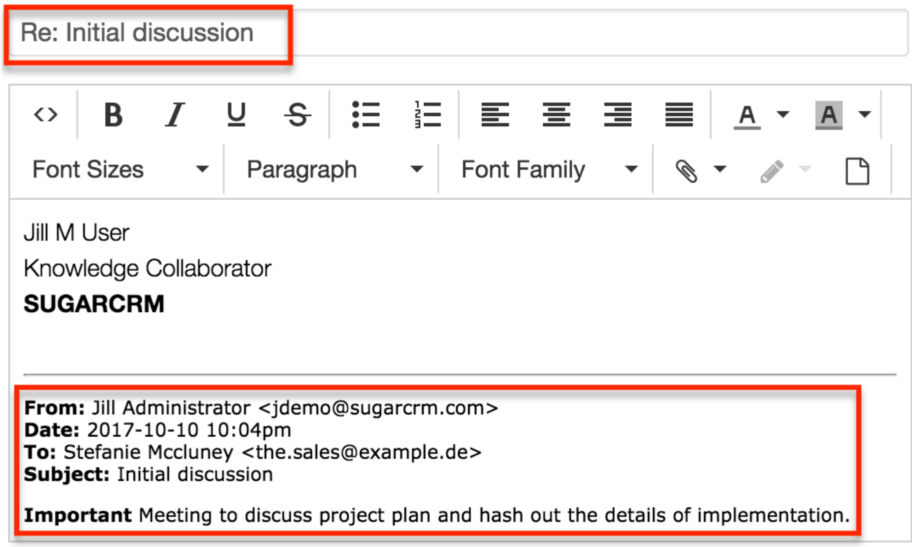


Replying to Emails

Users can access the "Reply" and "Reply All" functions from the record view of emails that have an Archived status. Select "Reply" to reply to only the sender of the selected email or select "Reply All" to reply to the sender and all other recipients of the original email.



When replying to an email, Sugar creates a new email while populating the body, subject, and recipients of the email and carrying over the Related To, Assigned To, and Teams fields from the original email. The subject line of the email you are replying to carries over to the new email preceded by the letters "Re: ". The body of the email you are replying to is also carried over to the reply message with a line above the contents to separate the original email from the content you are adding to the reply.

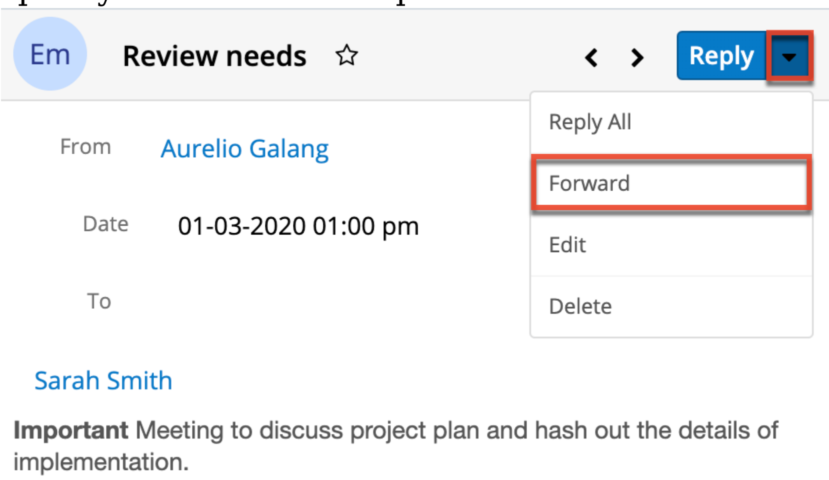


Enter your reply above the divider line in the compose email screen. For more information on how to compose an email, please refer to the Composing Emails section.

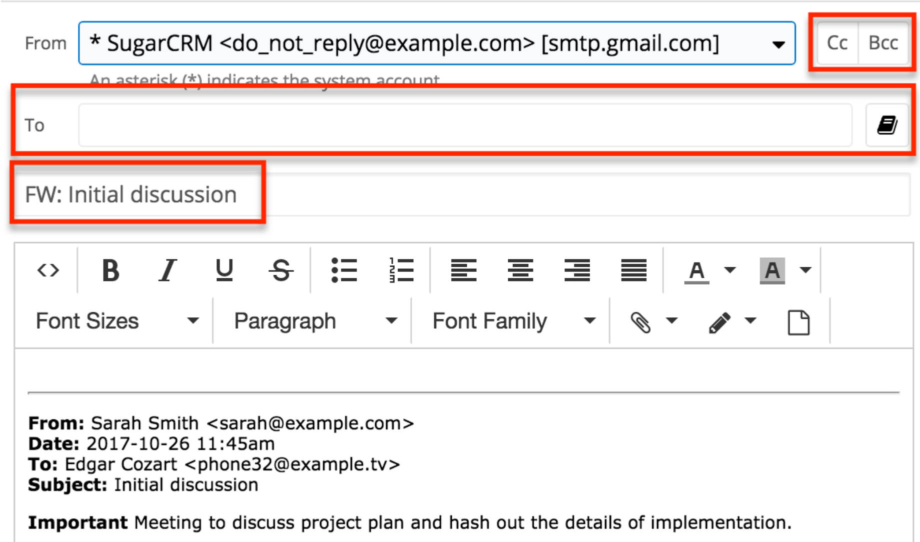
Note: If the original email contained any attachments, they will not copy to the reply email.

Forwarding Emails

Users can access the Forward function from the record view of emails that have an Archived status. Select "Forward" to open a compose window where you can specify one or more recipients.



When forwarding an email, Sugar creates a new email while populating the body and subject of the email and carrying over the Related To, Assigned To, and Teams fields from the original email. The subject line of the email you are forwarding carries over to the new email preceded by the letters "FW: ". The body of the email you are forwarding is also carried over to the message with a line above the contents to separate the original email from the content you may optionally add to the message. The recipient fields must be completed by the user before the email can be forwarded. For more information on adding recipients, please refer to the Working With Recipient Fields section of this page.



Optionally, enter a message 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.

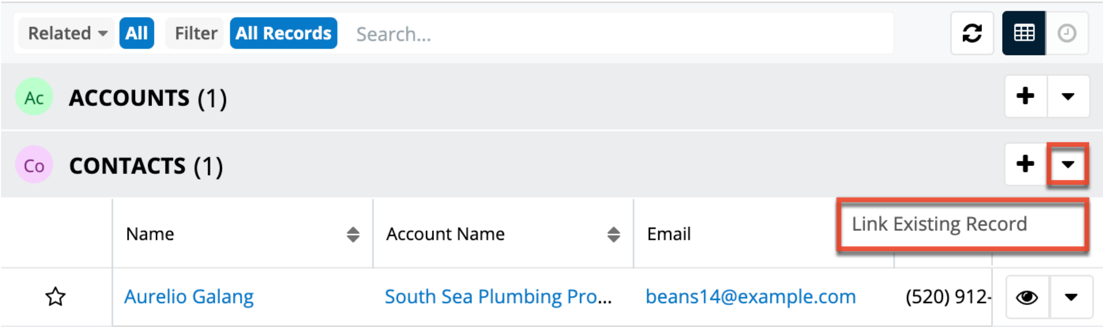
Note: If the original email contained any attachments, they will not copy to the forwarded email.

Relating Emails 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 emails archived in Sugar via incoming email accounts or the Sugar Email Archiving service. Implicitly related emails will show in the Emails subpanel and History dashlet of the related record.

While composing an email, users can set an explicit relationship via the Relates To field. This allows the user to relate the email to a Sugar record regardless of whether the record contains an email address related to the email.

In addition to using the Relates To field, you can link additional module records to emails via the related record subpanels on the email's record view.

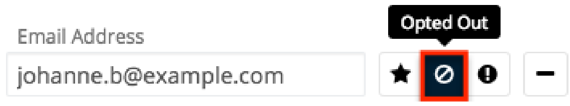


Understanding Email Address Opt-Outs

Email addresses can be marked as opted out in Sugar to indicate that the owner has not consented to receive marketing campaigns. To mark an email address as opted opt, simply click the button with a slashed circle to the right of the email address when editing the record (e.g., contact).

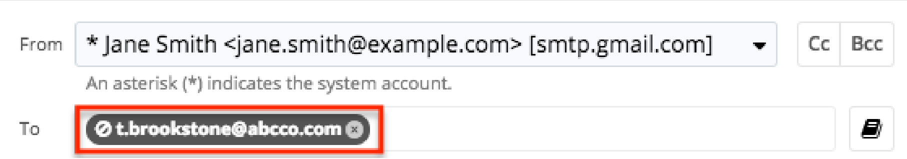
Administrators can configure whether new email addresses added to Sugar records default to opted-in or opted-out by using the "Opt-out new email addresses by default" option via Admin > System Email Settings. For more information regarding this option, refer to the Email documentation in the Administration guide.

When a recipient clicks the opt-out link in an email-type campaign, Sugar will automatically mark the recipient's email address as "Opted Out" in the corresponding record (e.g., contacts). For more information regarding opt-outs and campaigns, please refer to the Campaigns documentation as well as the Understanding Campaign Opt Outs article.



Opted-out email addresses are indicated by a blue circle with a line through it. Opted-out email addresses also display a Link button in record view. Clicking this button will copy a link to your computer's clipboard which you can send to the email address owner to request that they confirm their desire to receive marketing emails from your organization. When the copied link is visited in a web browser, Sugar will automatically set the email address to opted-in.

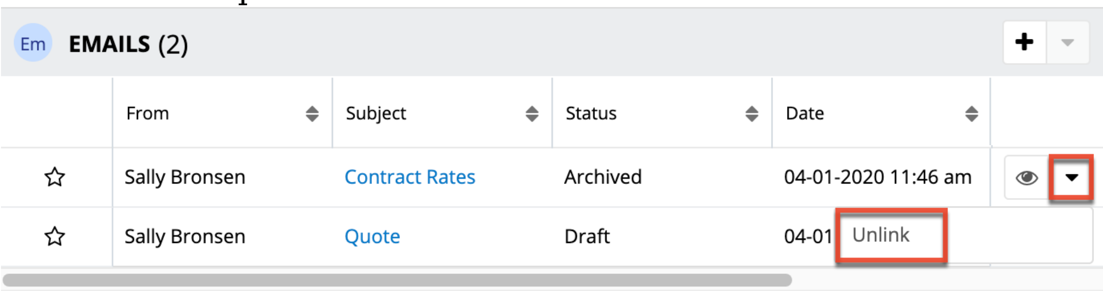
Please keep in mind that although email addresses marked as opted out cannot receive campaign emails, users can continue to send them transactional emails in Sugar. The recipient pill will display an opt-out status to indicate that it is an opted-out email address.



Unlinking Emails

When an email is explicitly related to a record, users have the option of unliking the email record via the Emails subpanel. Please note that the unlink option is not available for email records that are implicitly related via a matching email address or automated email importing. As a result, the unlink option is not available when viewing the Emails subpanel in the following modules: Accounts, Contacts, Leads, Targets, Cases, Opportunities, and Revenue Line Items. For more information on the different ways emails can be related to records in Sugar, please refer to the Relating Emails to Records section.

To delete the relationship between the record and the related email, simply navigate to the module record (e.g., Quotes) containing the related email and choose "Unlink" from the Actions menu on the far right of the desired record's row in the Emails subpanel. Please keep in mind that performing this action removes the relationship but does not delete the email record itself.



Email Templates

Email templates are used in Sugar to send simple form letters, automated email responses, or just commonly used emails to save time and prevent typos. They are also useful for ensuring a consistent style and voice for communications transmitted throughout your organization. Email templates can contain text, HTML content, images, and attachments. The content of templates may contain variables for field values like the recipient's name so that you can personalize the email for the recipient.

For information on using an existing template in an email message, please please refer to the Using a Template section of this page.

Note: Sugar's core product includes several places where email templates can be created for different purposes. For more information on alternative types of email templates in Sugar, please refer to the Understanding Email Templates for Campaigns, Workflows, and SugarBPM article.

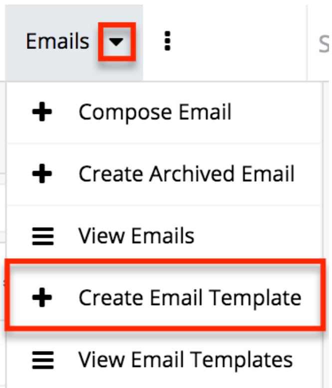
Viewing Email Templates

To view the list of available email templates, simply click the Emails module tab and select "View Email Templates". 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 documentation in the Administration Guide. By default, the system email templates are assigned to the private team of "Administrator", so they will not be accessible to any regular users.

Note: If you are logged in as an administrator, you can view and configure several out-of-the-box system email templates such as "Forgot Password email", "Call Notifications Emails", "Meeting Notifications Emails", "Assignment Notification Emails", "Scheduled Report Emails", etc.

Creating Email Templates

To create a new email template in Sugar, click the triangle on the Emails module tab and select "Create Email Template" from the module tab menu.



Refer to the Email Template Fields and Inserting Template Variables sections to complete the email template. For instructions on using templates in email messages, please refer to the Using a Template section of this page.

Email Template Fields

The Email Templates module contains the following fields:

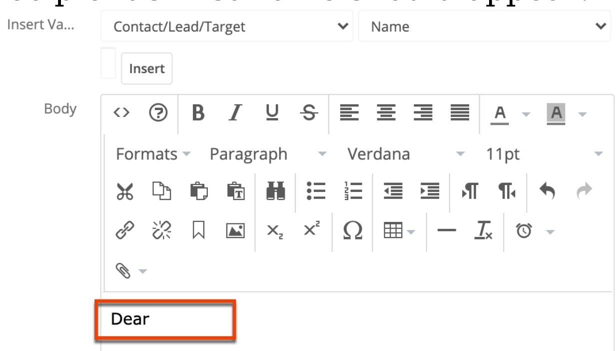
Field	**Description**
Assigned To	The Sugar user assigned to the process email template.
Body	The content of the message including any text, HTML content, images, or variables. **Note**: Use the TinyMCE functions to add formatting to the content. For more information on using TinyMCE, please refer to the User Interface documentation. To insert content variables, please refer to the Inserting Template Variables section of this page. 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. For more information, please refer to the Using CSS in Email Templates article.
Date Created	The date the email template record was created.
Date Modified	The date the email template record or its content was last modified.
Description	A description or other information about the email template.
Name	A unique and descriptive name to help users find the template.
Subject	The subject that recipients will see in their email inbox.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags

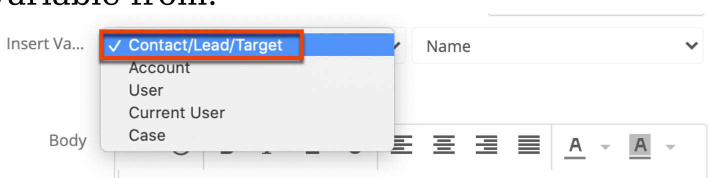
	documentation.
Teams	The Sugar team(s) that should have access to the email template.
Type	The type of email template. **Note**: The Type field defaults to "Email" when creating email templates via the Emails module. For more information on how to create an email template for campaigns, please refer to the Campaigns documentation.

Inserting Template Variables

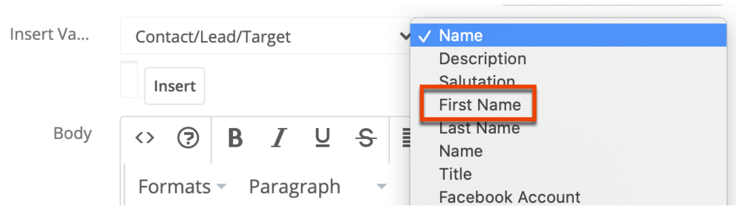
When constructing the subject and body of an email template, Sugar allows you to insert variables that correspond with Sugar fields on related records. The variables will be replaced with the related record's field values when the email is sent from Sugar. For example, you can insert a variable for the recipient's first name on a template that you plan to send to leads or contacts.

Use the following steps to insert a variable for the recipient's first name into an email template:

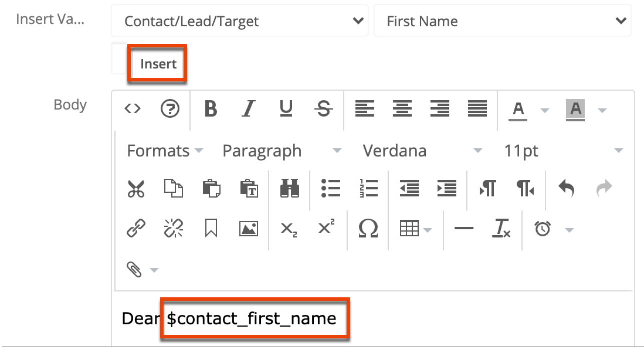
1. Click to place your cursor on the location in the subject or body where the recipient's first name should appear.


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.

Editing Email Templates

To edit a template, simply click the Emails module tab and select "View Email Templates". Click on the name of the template you wish to edit and modify the content, fields, and variables as needed. Please note that you will only be able to see and edit 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 documentation in the Administration Guide.

Email Signatures

An email signature is a snippet of text positioned below the body of an email message that typically contains the contact information of the sender. Sugar allows users to create multiple signature variations that they can insert during email composition. Optionally, users can mark one email signature as their default signature. Sugar will automatically insert the default signature when a user composes a new email, but the user has the option to delete it or replace it with a non-default signature.

For steps to insert signatures in email messages, please refer to the Using an Email Signature section of this page.

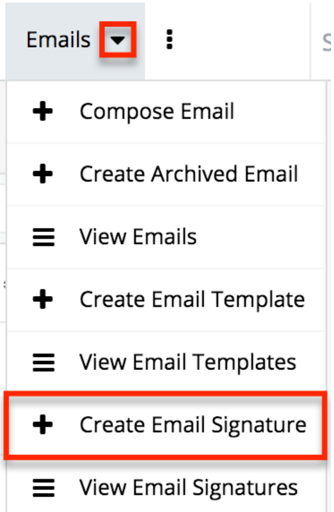
Note: You must have role access to the Emails module to view and create email signatures. For more information on roles, please refer to the Role Management documentation in the Administration Guide.

Viewing Email Signatures

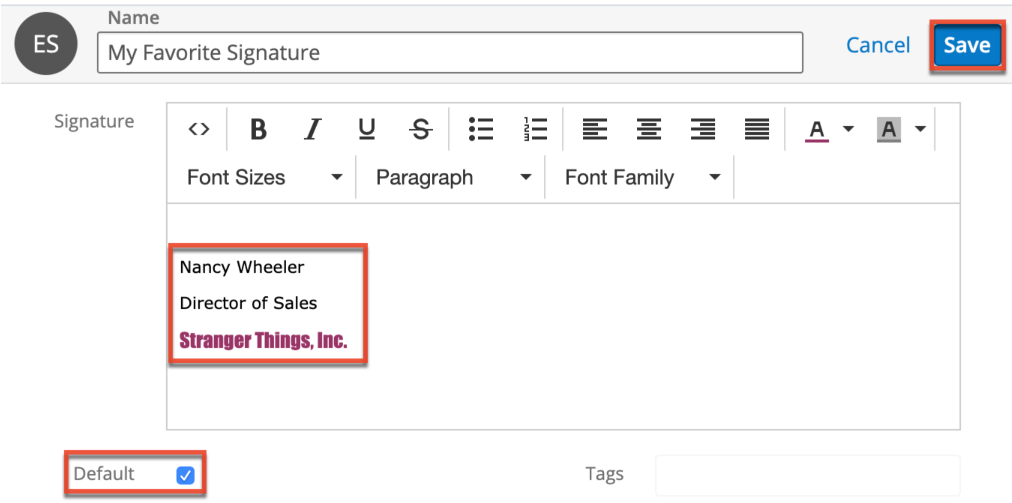
To view your saved signatures, navigate to the Emails module and select "View Email Signatures" from the Emails module tab menu. Please note that you will only be able to see email signatures that you have created.

Creating Email Signatures

To create a new email signature, click the triangle on the Emails module tab and select "Create Email Signature" from the module tab menu.



Give your new signature a descriptive name (e.g., "Sugarcon Promo Signature") and compose your signature in the Signature composition area just as you want it formatted for outgoing messages. Optionally, enable the "Default" checkbox to make this your automatic signature on all new emails. Each user can have one default signature. Marking a signature as your default will uncheck the Default field on any signature you may have previously designated.



When you are satisfied with the signature you have created, click "Save" to add the signature to the Signatures dropdown on email compose views for your user. Other users cannot access the signatures that you have created.

For more information about the fields available on the email signature record, please refer to the Email Signature Fields section. For instructions on using signatures in email messages, please refer to the Using a Signature section of this page.

Email Signature Fields

The Email Signatures module contains the following fields:

Field	Description
Name	A unique and descriptive name to help users find the template.
Default	Designates the user's default email signature. **Note**: Each user can have one default signature. Marking a signature as your default will uncheck the Default field on any signature you may have previously designated.
Signature	The content of the email signature including any text, HTML content, and images. **Note**: Use the TinyMCE functions to add formatting to the signature. For more information on using TinyMCE,

	please refer to the User Interface documentation. If images or advanced CSS are required in your email signature, it is highly recommended to host the images or CSS file on a publicly available hosting service and link to it in the email signature. For more information, please refer to the Using CSS in Email Templates article.
Date Created	The date the email template record was created.
Date Modified	The date the email template record or its content was last modified.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.

Editing Email Signatures

To edit a signature, navigate to the Emails module and select "View Email Signatures" from the Emails module tab menu. Click on the name of the signature you want to edit and adjust the content as needed. Please note that you can only view and edit the email signatures that you have created. Click "Save" to preserve your changes to the signature.

The edited signature will be available the next time you insert the signature into a new message. Any drafts that were saved with the signature before it was edited will retain the old signature. You can re-select the same signature from the draft's Signatures menu, which will replace the old version with the new one.

Sugar Email Archiving Service

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

Note: Before you can use Sugar Email Archiving, an administrator must enable the service for your instance. For activation instructions, please refer to the Email documentation in the Administration Guide.

Features and Limitations

Anyone can send emails to the Sugar Email Archiving address, so the capability is not limited to users. Sugar Email Archiving will not import messages that are larger than 10 MB including attachments.

When an email record is archived via the Sugar Email Archiving service, the email's team will default to "Global". Users with the appropriate permissions may update the Teams field after the email has been archived in Sugar.

If the sender's email client is configured to use non-English From, To, and Cc fields, forwarding emails to Email Archiving may not work. Instead, send the email to Email Archiving directly using the Cc and Bcc fields or forward the email as an attachment. For a 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 Sugar Email Archiving address.

Relating Archived Emails to Sugar Records

Sugar will scan incoming emails that are sent to the Email Archiving Service for the following relatable items:

- **From, To, and Cc fields**: The Sugar Email Archiving service scans the From, To, and Cc fields of the message and relates the email to any records it finds with a matching email address in Sugar. The archived email will appear in the Emails subpanel and History dashlet for any matching records in Sugar. Please note that Email Archiving cannot relate records based on email addresses in the Bcc field due to the field's hidden nature.
- **Message body**: The Sugar Email Archiving service scans the content in the body of the message and relates the email to any records it finds with a matching email address in Sugar. For an email address to be recognized in the body of an email, it must be preceded by "To:" and surrounded by opening and closing carets, for example, "To: <john@example.com>" or "To: John Smith <john@example.com>". The archived email will appear in the Emails subpanel and History dashlet for any matching records in Sugar.
- **Case Macro**: If an archived email's subject line contains a specially-formatted key known as the Case Macro, the message will automatically be associated with the corresponding case in Sugar's Cases module. For more information on using the case macro, please refer to the Automatically

Associating Emails With Cases article.

- **Calendar invites (.ics)**: If the email contains a calendar event, Sugar will archive the email as well as create a Meeting record. Any users, contacts, or leads that share an email address with the meeting's attendees will be added as meeting invitees in Sugar.

The Sugar Email Archiving Service will relate emails to records in the following modules:

- **Accounts, Contacts, Leads**: relates emails with a matching email address
- **Cases**: relates emails containing a matching case number via Case Macro
- **Meetings**: creates meetings from emails with calendar invites; relates matching invitees
- **Opportunities**: relates emails from related contacts if the admin has enabled Related Contacts Emails for opportunities

Note: Any relationships between archived emails and custom modules must be made manually.

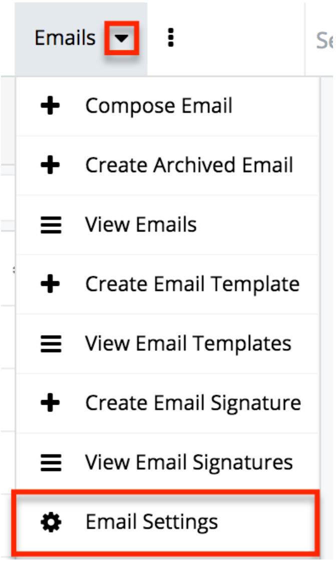
Sugar Email Archiving creates an implicit relationship between the email and matching records via the email addresses on the email. This implicit relationship behaves differently than an explicit relationship. For example, an email implicitly related (i.e., via Sugar Email Archiving by matching email address) to Beth Roberts' contact record would appear in her Emails subpanel just like one that is explicitly related (i.e., manually created relationship via subpanels). However, if Beth's email address is updated in Sugar, the emails created via Sugar Email Archiving will no longer appear in her subpanel since the email addresses no longer match. You can explicitly relate a contact to an email by navigating to the email's record view and selecting Beth Roberts in the email's Contacts subpanel.

Email Assignment

Like other records in Sugar, an email can only be assigned to one user. The Sugar Email Archiving service assigns emails to a user based on a match between the email address stored in the user's profile settings and an email address listed in the From, To, or CC fields. Sugar looks for users' email addresses in the From field first, then the To field, and then the CC field, and assigns the email record to the first user it finds with a matching email address. For example, if three Sugar users appear on an email, two in the To field and one in the CC field, the first user listed in the To field will be assigned the email record in Sugar.

Outgoing Email Accounts

Sugar users have the ability to create outgoing email accounts or edit configured email accounts by navigating to the Emails module and selecting "Email Settings" in the Emails module tab menu. The Outgoing Email Accounts list view displays all the outgoing email accounts to which the user has access in Sugar. Outgoing email accounts can include the default user email account, personal email accounts, as well as shared email accounts.



Note: The Outgoing Email Accounts list view does not support filtering, preview, or mass actions.

When the user first logs in to Sugar, the primary email address on their profile is created as a placeholder outbound account. Please note that you will need to configure this email account before using it to send emails. If the admin has enabled the "Allow users to use this account for outgoing email" option in Admin > System Email Settings, you will not be able to configure the default email account and must instead utilize the system email account which will appear in the Outgoing Email Accounts list view with an asterisk to indicate that it is a system account.

When a user chooses to mark an email account as a favorite, that account will be set as the primary "From" address when composing an email in Sugar. If a user has marked multiple email accounts as favorites, they will display in the "From" dropdown in alphabetical order followed by accounts not marked as a favorite.

The three types of outgoing email accounts in Sugar are described below:

- **User Email Accounts**: User email accounts can be created by all users and can consist of the user's personal email accounts (e.g., jane@example.com) as well as any shared email accounts (e.g., support@example.com, sales@example.com). Please note that user email accounts can only be edited by the record owner. In addition, the "Allow users to configure email accounts" option must be enabled in Admin > System Email Settings for users to create new outgoing email accounts. Reach out to your Sugar administrator if you do not see the Create button in the Outgoing Email Accounts list view.

    - **Personal Email Accounts**: Sugar users can configure one or more personal email accounts (e.g., jane@example.com, jane.smith@mycompany.com) to send email messages through Sugar. Personal email accounts will only be available for the current user since it is assigned to their private team.
    - **Shared Email Accounts**: Shared email accounts can be created by any user and allows groups of users to send outbound email messages using the same email account (e.g., support@example.com). To share outgoing email accounts, the user must assign the email account to the specific team(s) who can use this account to send emails. Once created, the shared email account will appear in the Outgoing Email Accounts list view for all users belonging to at least one of the assigned teams.
- **Default User Email Account**: A default email account is automatically created by Sugar for each user and uses the primary email address stored in the user's profile. To use this account, users need to make sure that the Username and Password fields are configured properly.
  Note: The users' default email accounts may be affected by the "Allow users to use this account for outgoing email" option in Admin > System Email Settings. If the administrator has enabled the option, users will not be able to configure their default email account and must instead utilize the system email account or create a new user email account. The system email account will display in the Outgoing Email Accounts list view with an asterisk to indicate that it is a system account.
- **System Email Account**: The system's outbound email setting is configured by the administrator via Admin > System Email Settings. By default, administrators will see the system email account in the Outgoing Email Accounts list view. Though uncommon, the administrator may choose to allow users to send email using the system email account by enabling the "Allow users to use this account for outgoing email" option in Admin > System Email Settings. Once enabled, users will not be able to configure their default email account and must instead utilize the system email account or create a new user email account. In addition, users will see the system email account in the Outgoing Email Accounts list view with an asterisk to indicate that it is a system account.

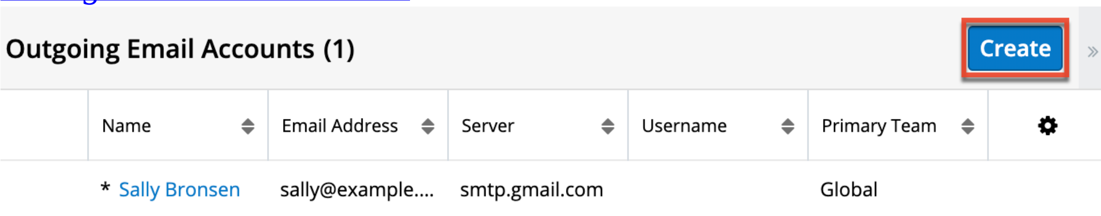
Once the necessary outgoing email accounts have been configured, users will be able to send email messages through Sugar using one of the available accounts (e.g., jane@example.com, support@example.com). Please note that to send messages through the Sugar application, you must select "Sugar Email Client" from the Email Settings section of your user profile. For more information, please refer to the Getting Started documentation.

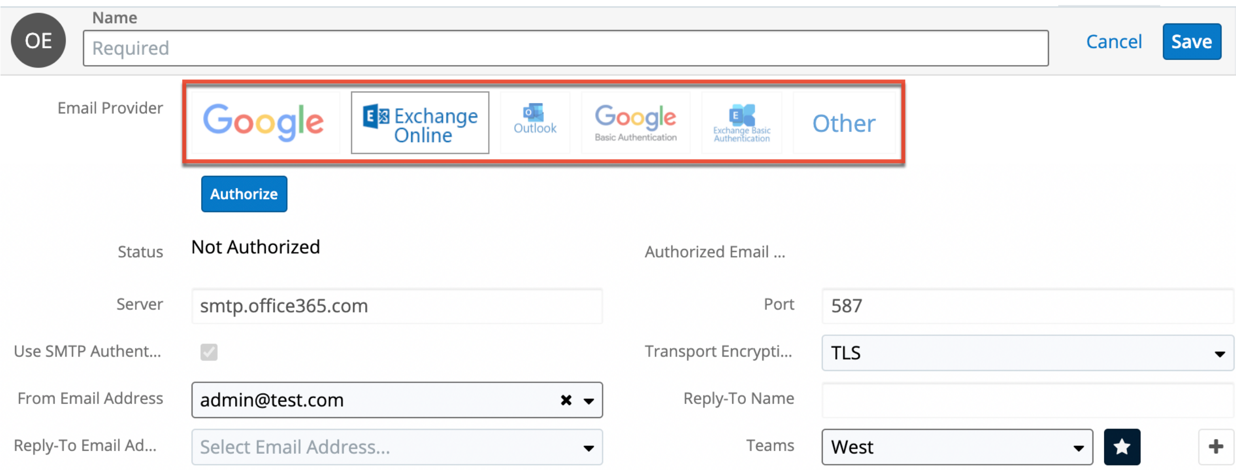
Note: Email messages sent from Sugar will be automatically archived and linked to existing records throughout the application.

Creating Outgoing Email Accounts

Sugar users have the ability to configure personal and shared email accounts by clicking the Create button in the Outgoing Email Accounts list view. You can also click the Copy option to duplicate an existing outgoing email account record if you are creating another email account with similar settings. Once created, you can mark one or more as a favorite that will be used by default when composing an email.

Use the following steps to add a new outgoing user email account:

1. Navigate to the Emails module and select "Email Settings" from the module tab.
2. Click "Create". If you do not see the Create button, talk to your administrator about enabling the system email setting "[Allow users to configure email accounts]()".


3. Click on the appropriate Email Provider logo (e.g., Google, Exchange Online) to expose provider-specific fields pre-populated with their most common default settings. For accounts with any other email provider, select "Other".


Note: For Google Basic Authentication accounts, you may be required to enable less-secure app access within your Google account. For more information, please refer to [Google's help documentation]().
4. Complete the following fields for your email account. All required fields are

marked as such and must be completed prior to saving. If you are not familiar with these terms or their values, please check with your IT department or email provider.

- **Name**: The name of the outgoing email account that will be used to identify it in list view and will appear as the "From" name on messages sent from Sugar via this account. Defaults to the first and last name in the user's profile.
- **Email Provider**: Choose your mail provider to populate provider-specific values.
- **Authorize**: Click this button to authorize the Google/Exchange Online mail account to be the outgoing email account. The Google or Microsoft connector must be configured via Admin > Connectors before you can authorize and set up the mail account.
  Note: For Google mail, a "This app isn't verified" warning may appear after selecting your Gmail account to authorize. You can click the Advanced link then click the "Go to..." link at the bottom of the window to proceed and grant permission for the connection to occur. For more information on this warning, refer to the Unverified apps article on the Google Cloud Platform Console Help page.
- **Status**: The status will display "Authorized" once the mail account is authorized.
  Note: Only available for Google and Exchange Online tabs.
- **Authorized Email Address**: The email address of the authorized mail account.
  Note: Only available for Google and Exchange Online tabs.
- **Server**: The web address of the external email server from which emails will be viewed in Sugar.
- **Port**: The communication port number used for connecting to the email server.
- **Use SMTP Authentication**: Select this box to require server authentication for the account. For "Google" and "Exchange Online", this option is automatically enabled. Most email servers require authentication for security purposes. By default, authentication is required for Google, Exchange, and Outlook providers. If left unchecked, the SMTP server will accept anonymous connections, which is not recommended. The following fields are displayed when "Use SMTP Authentication" is enabled for Outlook, Google Less Secure Apps, Exchange, and Other providers:
  - **Username**: Enter the username for the external account. The username is often the email address.
  - **Password**: The Password field group contains a grayed-out field that cannot be edited and the following two required fields:
    - **New Password**: Enter the account's existing password.
    - **Confirm Password**: Re-type the account's existing

password. This value must exactly match the "New Password" value in order to properly authenticate.

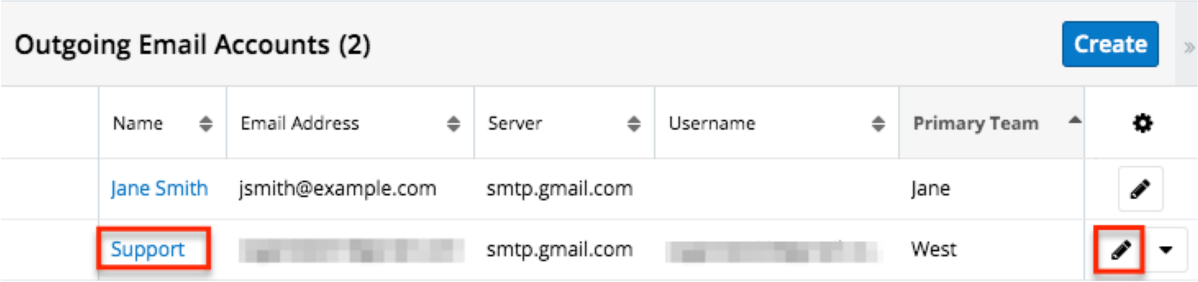
    - **Transport Encryption**: Select the appropriate option from the dropdown to use Secure Socket Layer (SSL), Transport Layer Security (TLS), or no encryption (None) when connecting to the email server.
    - **From Email Address**: The email address used to send messages for this account. Defaults to the primary email address stored in the user's profile.
        - If specifying a different address than the email address associated with the account you are authenticating, the email server being utilized may need to be configured to allow the email account to send email as the entered From Address.
        - For more information on configuring "Send As" permissions with Gmail, refer to Gmail's Help documentation.
        - For Exchange Online, enter only the authorized email address, as it cannot send emails using a different email address unless the organization's Exchange admin has configured the account to allow this.
    - **Reply-To Name**: To have replies to your email sent to a name and email address other than the From name and address, populate both the Reply-To Name and Reply-To Email Address.
    - **Reply-To Email Address**: To have replies to your email sent to a name and email address other than the From name and address, populate both the Reply-To Name and Reply-To Email Address.
    - **Teams**: The Sugar team(s) assigned to the outgoing email account. User email accounts are assigned to the user's private team by default. Adding teams to an email account allows the users belonging to the teams to also send from the account. The shared email account will appear in the Outgoing Email Accounts list view for all users belonging to at least one of the assigned teams.
5. Once the necessary information is entered, click "Save" to preserve the changes. Sugar will automatically validate the settings and alert you if there is an error.

Though uncommon, users may be able to use the system's outgoing email server if the administrator allows it. For more information on configuring the system outgoing email server settings and allowing users to use the system account, please refer to the Email documentation in the Administration Guide.

Editing Outgoing Email Accounts

To edit outgoing user email accounts that you created, navigate to the Emails module and select "Email Settings" from the module tab menu. Then in the

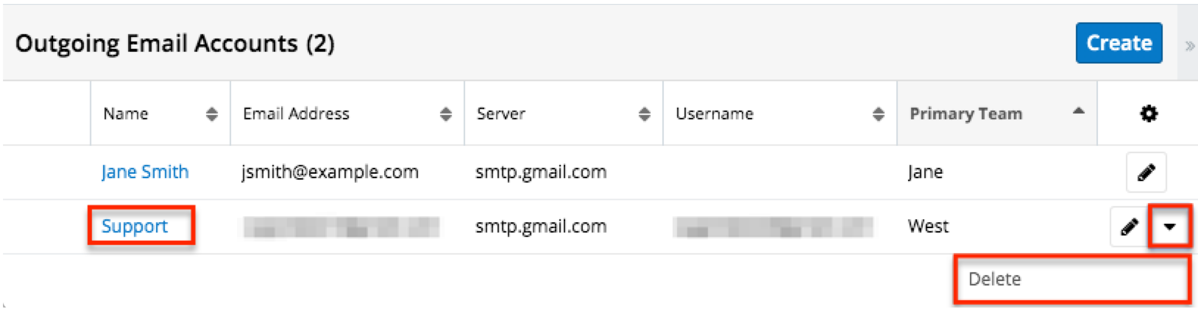
Outgoing Email Accounts list view, click the pencil icon to the far right of the record's row you wish to edit. Alternatively, you can also click on the email account's name and then click the Edit button on its record view. Please note that outgoing user email accounts can only be edited by the record owner.



Note: If the administrator has exposed the system email account to users, it will be listed in the Outgoing Email Accounts list view with an asterisk and cannot be edited by regular users.

Deleting Outgoing Email Accounts

To delete an outgoing user email account that you created, navigate to the Emails module and select "Email Settings" from the module tab menu. Then in the Outgoing Email Accounts list view, click the Record Actions menu to the far right of the record's row and select "Delete". Alternatively, you can also click on the account's name and then select "Delete" from the Actions menu on its record view. Please note that outgoing user email accounts can only be deleted by the record owner.



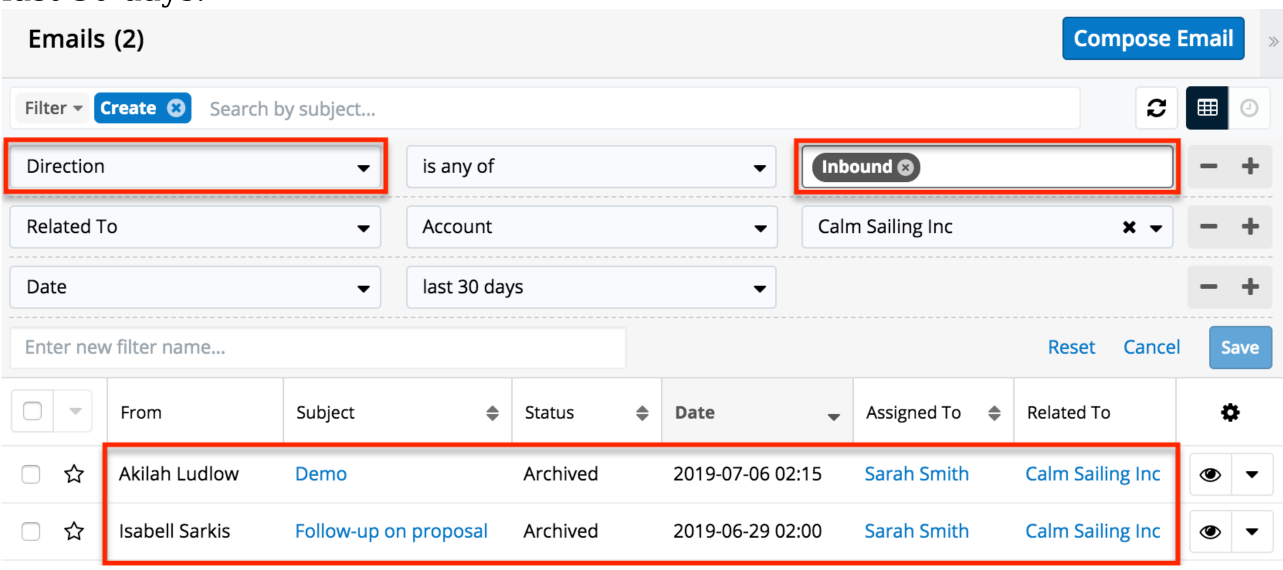
Note: If the administrator has exposed the system email account to users, it will be listed in the Outgoing Email Accounts list view with an asterisk and cannot be deleted. In addition, the default user email account that was created when the user's record was created cannot be deleted.

Email's Direction Field

The Direction field in the Emails module specifies the direction (e.g., Outbound, Inbound, Internal, Unknown) of the email based on the sender (e.g., user, customer) and the recipient(s) in the email message. Please note that this field is not visible on record views or as a list view column, and is available only as an available filter field in the Emails list view. Sugar automatically sets the direction for archived emails and determines the direction using the following criteria:

Direction	Sender	Recipient	Notes
Inbound	The sender is not a user/employee		
Outbound	The sender is a user/employee	At least one recipient is not a user/employee	
Internal	The sender is a user/employee	All recipients are a user/employee	
Unknown	The sender is blank		Draft emails have a direction of "Unknown".

To filter the emails by direction, simply create a filter using the Direction field then choose the value (e.g., Inbound) you wish to filter the list view by. In the example below, Sugar will return all inbound emails for Calm Sailing Inc. received in the last 30 days.



Working With Sugar Modules

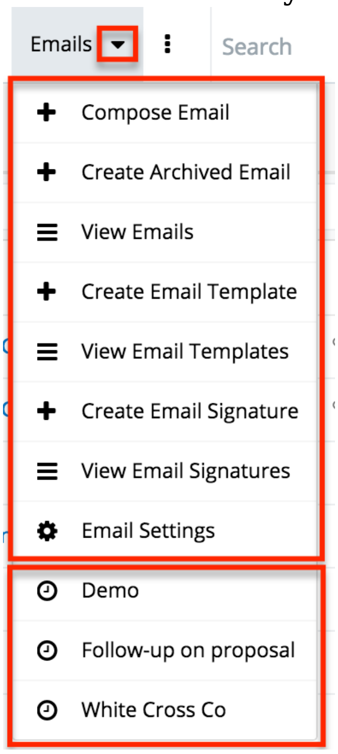
The Emails module uses Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Email Menus

The Emails module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and their options with links to more information about each option in the User Interface documentation or, for emails-specific functionality, within this page.

Emails Module Tab Menu

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 can also click the triangle on the Emails module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of emails you last viewed in the module.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Compose Email	Opens the composition layout to

	compose and send a new email message or, optionally, save the message as a draft.
Create Archived Email	Opens the composition layout to create a historical record of an email message that was sent or received outside of the Sugar application.
View Emails	Opens the Emails list view to search and display email messages.
Create Email Template	Opens the Email Templates edit view layout to create a new email template.
View Email Templates	Opens the Email Templates list view to search and display email templates.
Create Email Signature	Opens the composition layout to create a new email signature.
View Email Signatures	Opens the Email Signatures list view to search and display email signatures.
Email Settings	Opens the Outgoing Email Accounts list view to display, edit, and create email accounts.

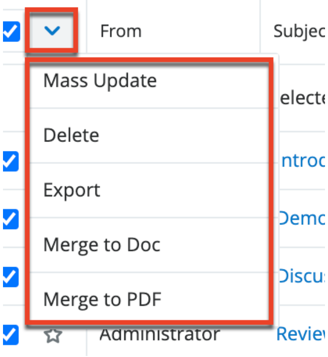
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Emails list view displays all email records and allows for searching and filtering to locate specific emails. You can view the basic details of each record within the columns of the list view or click an email's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual email records or click the checkbox in the list header to select all records displayed on the current set of list view results.

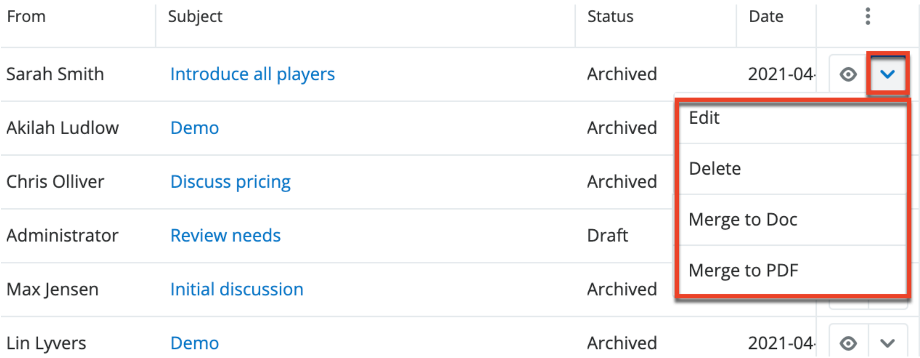


The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more email records at a time.
Delete	Delete one or more emails at a time.
Export	Export one or more email records to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual email directly from the list view.

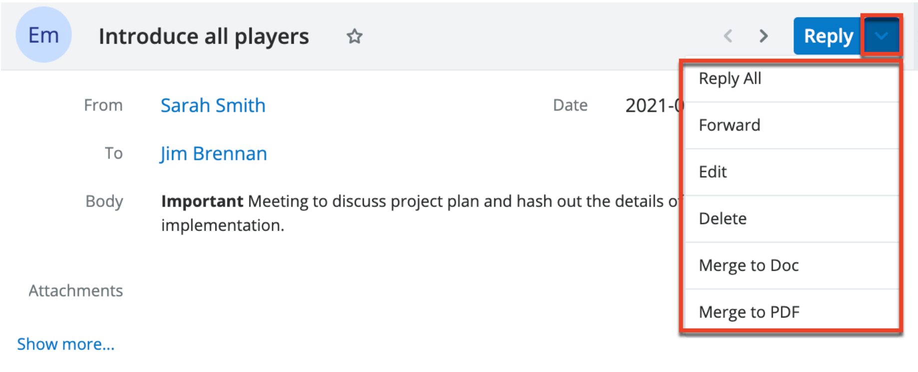


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this email in the intelligence pane.
Edit	Edit this email.
Delete	Delete this email.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Emails record view displays a single email in full detail including its fields, subpanels of related records, and activity stream. To access an email's record view, simply click a hyperlinked email subject from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Reply	Respond to the sender of this email.
Reply All	Respond to the sender and all other recipients of this email.
Edit	Edit this email.
Delete	Delete this email.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

The following links open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules.

Content Link	Description
Emailing Sugar Records Emailing via Emails Module Emailing via Quick Create	Once an outgoing email account has been properly configured, Sugar allows users to compose email messages in the application and send them to recipients.

	Emails composed in Sugar utilize rich-text formatting utilizing the TinyMCE text editor. The links to the left will take you to the corresponding section of the User Interface documentation where you can learn about the various ways to send emails to records in Sugar.
Viewing Emails Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Dashlets Viewing via Activity Streams Viewing via Preview Viewing via Reports	The Viewing Records section describes the various methods of viewing archived email records, including via the Emails list view and record view, the Recently Viewed menu in the Emails module tab, list view dashlets showing email information, Activity Stream entries concerning email updates or where a user mentions an email, previewing emails in the right-hand side panel, and reports displaying email data.
Searching for Emails Global Search List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to the two searching methods for locating emails: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Emails module. **Note**: The "My Sent" filter on Emails list view shows all emails where the sender is the current user, regardless of which email account was used to send the message. To restrict search results by the Group Inbound account that received them, create a filter using the "Inbound Account" field.
Emails List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting	The List View section walks through the many elements of the Emails List View layout which contains a filterable list of all email records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Emails list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of

Column Selection Preview Record Actions Menu More Emails Activity Stream Intelligence Pane	this page.
Emails Record View Favorite Designation Next or Previous Record Actions Menu Show More Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Activity Stream Intelligence Pane	The Record View section walks through the many elements of the Emails Record View layout which contains detailed information about a single email record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Emails record view are described in the Record View Actions Menu section of this page.
Editing Emails Editing Inline via Record View Editing via Record View Editing Inline via Subpanels Editing Inline via List View Mass Editing via List View	The Editing Records section describes the various methods of editing existing email records, including inline via the Emails record view, in full edit mode on the record view, inline via the Emails subpanel on related module records, inline via the Emails list view, and via the Mass Update option on the list view. **Note**: Users cannot edit an email's content, dates, or recipients once it has been archived. Users with appropriate role permissions can, however, edit the Assigned To, Teams, Related To, and Tags fields for archived emails.
Deleting Emails Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted emails, including via the Emails record view, an individual record's Actions menu on the Emails list view, and the Mass Actions menu on the list view. **Note**: Deleting an email will also delete any attachments for the email from the Notes module. To preserve attachments, download and save email attachments either locally or into the Sugar Documents module before deleting an email.

Exporting Emails	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of emails and all their data as a .csv file for use outside of Sugar (e.g., in Microsoft Excel).
Favoriting Emails Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking emails as favorites, including via the Emails list view, Emails record view, or any Emails subpanel appearing on the record view of a related module. Favoriting an email allows you to easily access it from list views, dashlets, or the Emails module tab.

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Meetings

Overview

Sugar's Meetings module is used to track meetings which can be related to other Sugar records that represent the attendees or topic of discussion. You can schedule upcoming meetings that remind you when the scheduled time approaches or log meetings you have already held to keep a record of the discussion. Meeting records can have multiple attendees, both inside and outside Sugar, and include the ability to send invitations as well as reminder emails. When a meeting is repeated on a regular schedule, you can configure it to recur.

Sugar's Calendar module displays your meetings and allows you to create meetings directly from your calendar. Meetings can also be viewed and created via the Planned Activities dashlet on a contact or other related module record. For example, a contact record's Planned Activities dashlet displays Sugar meeting records that are related to the contact. Creating a meeting from the dashlet creates a relationship between the records automatically.

This documentation will cover using the Meetings module. For general usage instructions concerning views and actions that are common across most Sugar modules such as creating, editing, and deleting records, please refer to the Working With Sugar Modules section of this page.

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.

Meeting Fields

The Meetings module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The following definitions are suggested meanings for the fields, but the fields can be leveraged differently to meet your organization's needs. Users with administrator or developer access can 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. **Note**: The user in the "Assigned to" field cannot be removed from a meeting's guest list.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
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.
Display URL	The URL to access the meeting if hosted by an external application (e.g., WebEx,

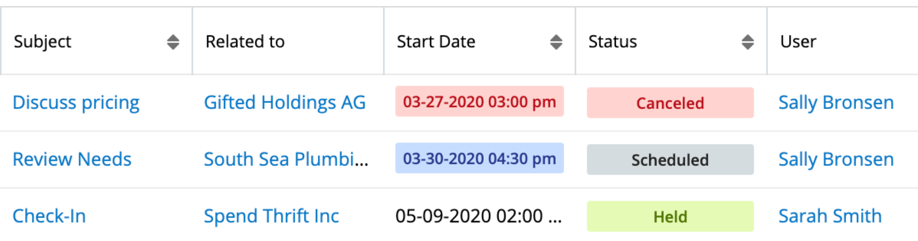
	GoToMeeting, etc.). **Note**: This is a dependent field that appears when a value other than "Sugar" is selected as the meeting type.
Email Reminder Time	Send a reminder email to all meeting guests at a specified duration prior to the meeting's start time.
End Date	The end date and time of the meeting.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
Internal Notes	Notes about the meeting that are visible only to internal users.
Invitation Body	A description or other information about the meeting that is sent to meeting guests.
Location	The meeting location.
Meeting Password	The password to access the meeting via WebEx, GoToMeeting, etc. **Note**: This is a dependent field that appears 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.
Modified By Name	The name of the Sugar user who last modified the meeting record.
Popup Reminder Time	Trigger a reminder popup alert to all Sugar user guests at a duration prior to the meeting's start time. **Note**: Users must be logged into Sugar

	in an open browser window in order to receive the popup reminder.
Related To	The related module record associated with the meeting.
Repeat Type	For a recurring series of meetings, the timespan unit (e.g., Every x days = "Daily", Every x weeks = "Weekly") to use for the interval of time between recurrences.
Repeat Interval	Shown when Repeat Type does not equal "None", the number of units in the "Repeat Type" field that should pass between recurrences, for example: • **Every three days**: Repeat Type = "Daily"; Repeat Interval = "3" • **Every other week**: Repeat Type = "Weekly"; Repeat Interval = "2" • **Each year**: Repeat Type = Yearly; Repeat Interval = "1"
Repeat	Shown when Repeat Type does not equal "None"; Select "Until" to set a hard end date to recurrences or "Occurrences" to specify the number of times to repeat the meeting.
Repeat Until	Shown when "Repeat" equals "Until", the date of the last occurrence in the series.
Repeat Occurrences	Shown when "Repeat" equals "Occurrences", the number of meetings in the series.
Repeat on Days of Week	Shown when "Repeat Type" equals "Weekly", the day(s) of the week that the meetings will occur in the recurring series.
Custom Date (monthly)	Shown when "Repeat Type" equals "Monthly", select "Each" to specify a certain day(s) of the month or "On the" to set a variable such as the first Monday of each month.
Custom Date (yearly)	Shown when "Repeat Type" equals

	"Yearly", select "None" to repeat the meeting on the same day every year or "On the" to set a variable such as the last Friday of each year.
Start Date	The date and time that the meeting or first meeting in the series of recurring meetings is scheduled to begin.
Status	The current status (e.g., Scheduled, Held, Canceled) of the meeting record.
Subject	The subject of the scheduled meeting.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the meeting record.

Meetings Color Codes

When viewing the Meetings list view and the Meetings dashlet, the start date may be highlighted in blue or red. This allows users to quickly view scheduled meetings that are either overdue or start within the next 24 hours. Please note that the start date will not be highlighted for meetings with a status of "Held" or with a start date in the future (beyond 24 hours from the current date and time).



The start dates in the Meetings list view are highlighted as follows:

- **Blue**: The meeting has not been held, and the start date occurs within the next 24 hours.
- **Red**: The meeting has not been held, and the start date has passed.

Please note that you can only 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.

List View Filters

While universal list view filters are included with Sugar out-of-the-box, the following filters are unique to the Meetings list view:

- **My Meetings as Guest**: All meetings for which you are a guest, either because you are a non-removable guest by virtue of being the assigned-to user or because you have been invited and not declined the invitation. All meeting status types are included in this filter (scheduled, held, canceled).
- **My Meetings as Owner**: All meetings for which you are the assigned-to user. All meeting status types are included in this filter (scheduled, held, canceled).
- **Scheduled Meetings as Guest**: All meetings with a "Scheduled" status for which you are a guest, either because you are a non-removable guest by virtue of being the assigned-to user or because you have been invited and not declined the invitation.
- **Scheduled Meetings as Owner**: All meetings with a "Scheduled" status for which you are the assigned-to user.

Meeting Guests

The following guests are automatically added to a meeting's guest list:

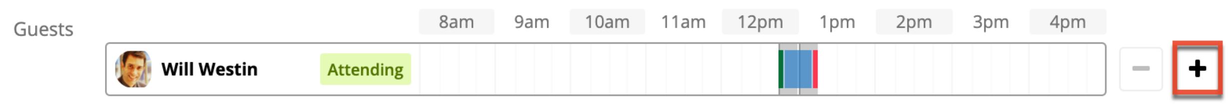
Automatic Guest	To Remove the Guest
The lead or contact in the "Related to" field, if any	This guest can be removed from the guest list at any time. If a lead or contact record is related to a meeting but is not on the guest list, then you will not see the meeting in the person's Meetings subpanel.
The user who created the meeting	This guest can be removed from the guest list after initially saving the meeting. Create and save the meeting, click "Edit", and then click the Remove (-) button next to the created-by user's row in the Guests panel.
The user in the "Assigned to" field for the meeting record	The assigned user cannot be removed from the guest list. If you need to

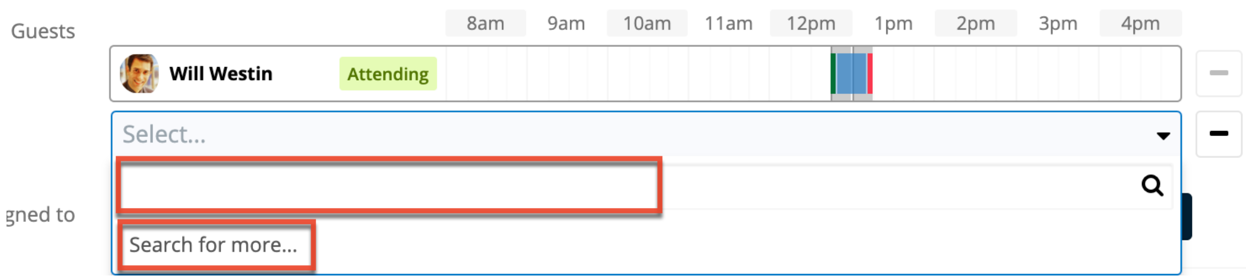
	remove the assigned user from the guest list, you must first re-assign the meeting to a different user. Once the meeting record is assigned to a new user, the original user will remain a guest until removed via the Remove (-) button.

Users may add additional guests (e.g., contacts, leads, users) to meetings via the Guests panel in the meeting's record view.

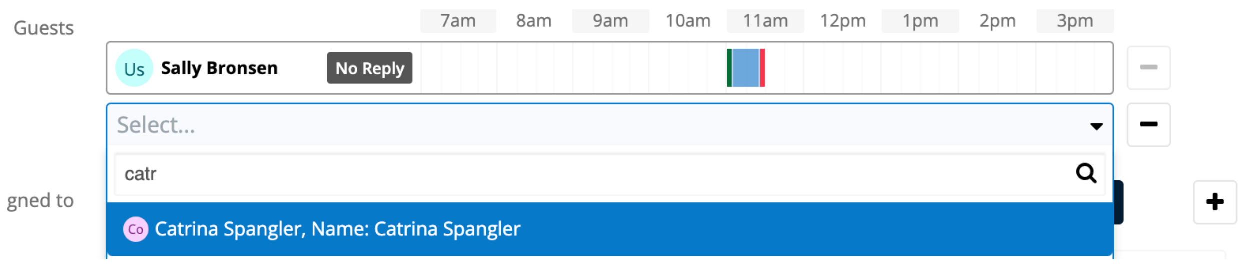
Adding via the Guests Panel

Use the following steps to add attendees via the Guests panel:

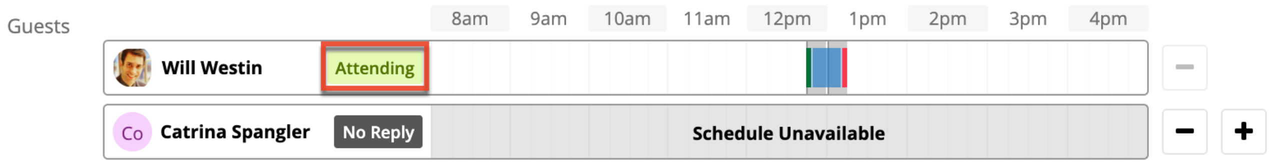
1. Navigate to the Meetings module and create a new record or edit an existing record.
2. Scroll to the Guests panel and click on the Add (+) button located on the far right.


3. To add a guest, type in the name of the lead, contact, or user via the search bar that appears or select "Search for more..." to search the Contacts list view. To remove a guest, click the Remove (-) button to the right of the guest's row.
Note: The user in the "Assigned to" field on the meeting record cannot be removed from a meeting. To remove the assigned user from the guest list, re-assign the meeting to a different user first.


4. Click "Save" or "Save and Send Invites" if you would like Sugar to send email invitations to the guests.
Note: Confirm that the guests' Sugar records have valid email addresses prior to clicking "Save and Send Invites". If a guest has no email address or their email address is marked as invalid, Sugar cannot email them an invitation to the meeting. A message and icon will alert you when adding the guest and when viewing the meeting's record view.



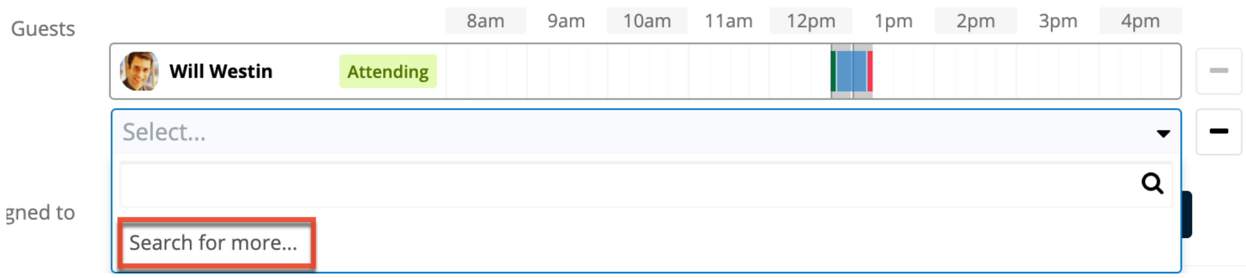
Once the guest has responded to the email invitation, their acceptance status will appear as a color-coded badge next to their name.



Adding via Create a Guest

Use the following steps to create a new contact and add them as a meeting guest:

1. Navigate to the Meetings module and create a new record or edit an existing record.
2. Scroll to the Guests panel, click on the Add (+) button, and then click on "Search for more..." to expand the Contacts list view.



3. At the top of the list view, click the Create button and fill out the appropriate fields to create a new contact. Once completed, save the new contact record and Sugar will automatically add the contact to the guest list for the meeting.
4. Confirm the remaining fields and guests are configured appropriately and then save the meeting.

Recurring Meetings

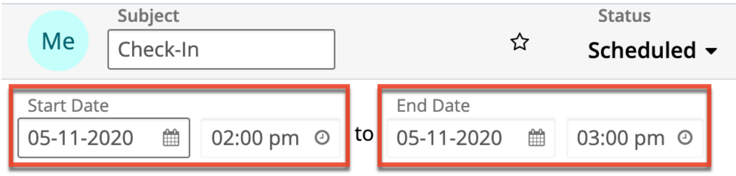
Meetings can be saved as recurring events so that users do not have to create individual meeting records for regularly occurring events. Recurrences may occur daily, weekly, monthly, or yearly. When a recurring meeting is saved, Sugar creates a series of individual meeting records so that all recurrences appear in the [Meetings list view](#).

Note: If a user creates a recurring meeting but the start date does not match the specified recurrence day(s) of the week, the start date will reset to the first matching day after the meeting's Date Created.

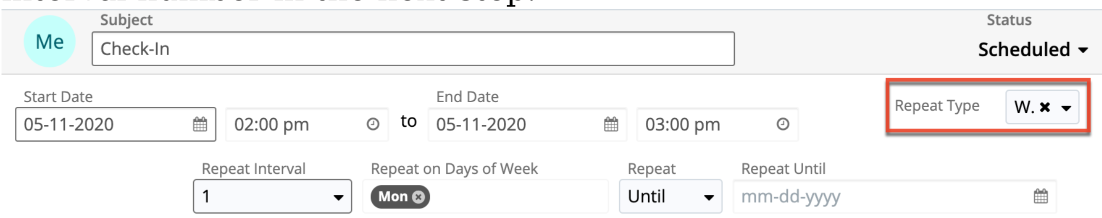
Creating Recurring Meetings

To schedule a series of recurring meetings, follow the instructions below. As an example, we will schedule a 30-minute meeting that recurs every other Thursday until the end of the 2017 calendar year.

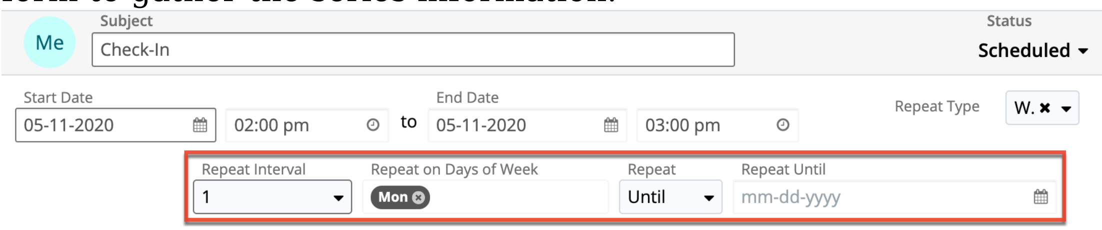
1. Navigate to the Meetings module and create a new record.
2. In the Start Date field, enter the date and time that the first Thursday meeting will occur and set the End Date for the same day but 30 minutes later.

   Note: If a recurring meeting's start date does not match the meeting's recurrence day(s) of the week, the start date will reset to the first matching day-of-week after the meeting's Date Created.
3. To create a series of meetings, expand the field labeled "Repeat Type" and select an interval from the dropdown list. Our use case requires an interval of weeks (e.g., every two weeks), so we will select "Weekly" and specify our interval number in the next step.

4. Upon choosing a Repeat Type value, a new row of fields will appear on the form to gather the series information.

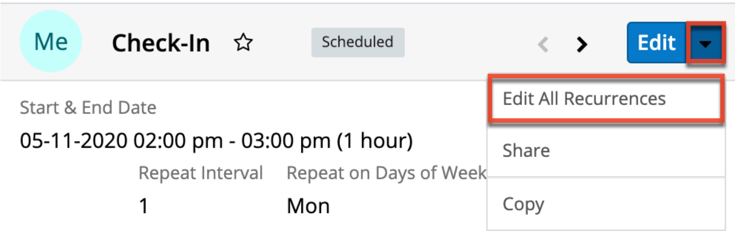
   

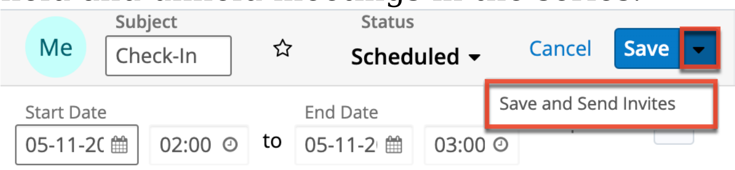
   The fields displayed are dependent upon the values you select as you go. Please refer to the [Meeting Fields](#) section for complete details on the available options. To schedule a meeting that recurs every other Monday

until the end of the 2020 calendar year, set the following values:
    - **Repeat Interval**: 2
    - **Repeat on Days of Week**: Mon
    - **Repeat**: Until
    - **Repeat Until**: 2020-12-31
5. Confirm that the remaining fields and guests are configured appropriately.
6. Save the record and confirm that all recurrences appear as separate records in the Meetings module's list view.

Editing All Recurrences via Record View

Recurring activities will display the option to edit all occurrences of the activity in the record's actions menu. This option will affect all of the meeting records in a series, even if some of the meetings have been closed and set to "Held". Use the following steps to edit all recurrences in a series of meetings via the record view:

1. Navigate to the record view of any meeting in the series of recurring meetings.
2. Select "Edit All Recurrences" from the Actions menu.


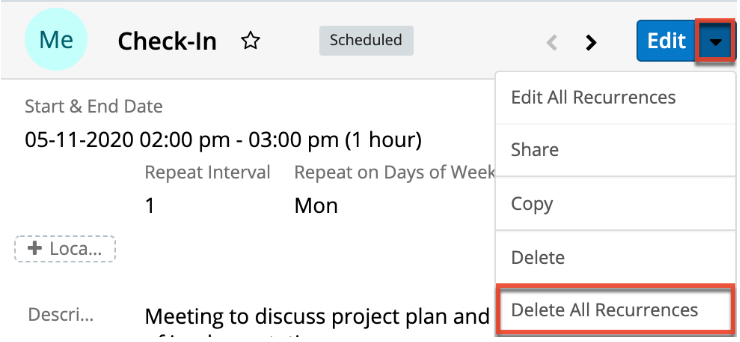
3. Edit the meeting record as needed.
4. Then click on "Save" or "Save and Send Invites" to apply the changes to all held and unheld meetings in the series.


Deleting All Recurrences via Record View

Recurring activities will display the option to delete all occurrences of the activity in the record's actions menu. This option will affect all of the meeting records in a series, even if some of the meetings have been closed and set to "Held". Use the following steps to delete all recurrences in a series of meetings via the record view:

1. Navigate to the record view of any meeting in the series of recurring meetings.

2. Select "Delete All Recurrences" from the Actions menu.

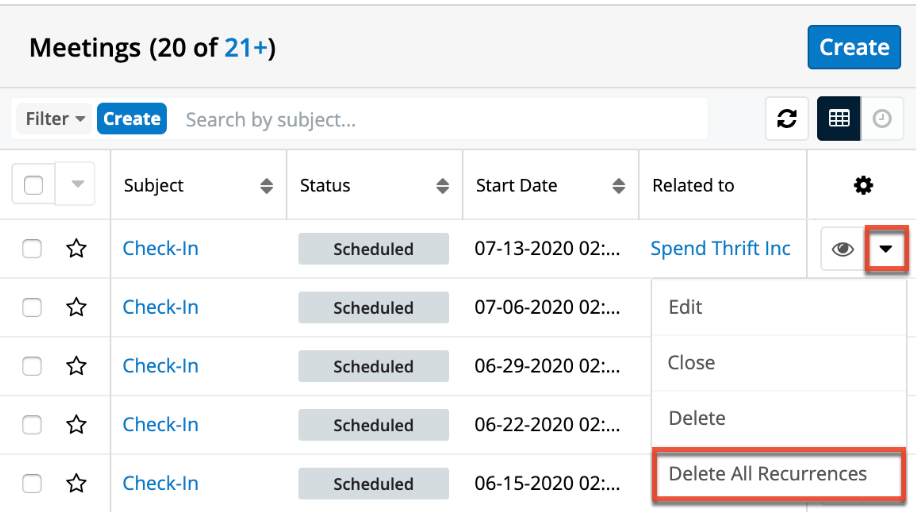


3. A pop-up message will display asking for confirmation. Click "Confirm" to delete all held and unheld meetings in the series.

Deleting All Recurrences via List View

Recurring activities will display the option to delete all occurrences of the activity in the record's actions menu in the list view. This option will affect all of the meeting records in a series, even if some of the meetings have been closed and set to "Held". Use the following steps to delete all recurrences in a series of meetings via the list view:

1. Navigate to the Meetings list view by clicking the Meetings module tab.
2. Use the Module Search to find the meeting in the series of recurring meetings that you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete All Recurrences".



4. A pop-up message will display asking for confirmation. Click "Confirm" to delete all held and unheld meetings in the series.

Meeting Reminders

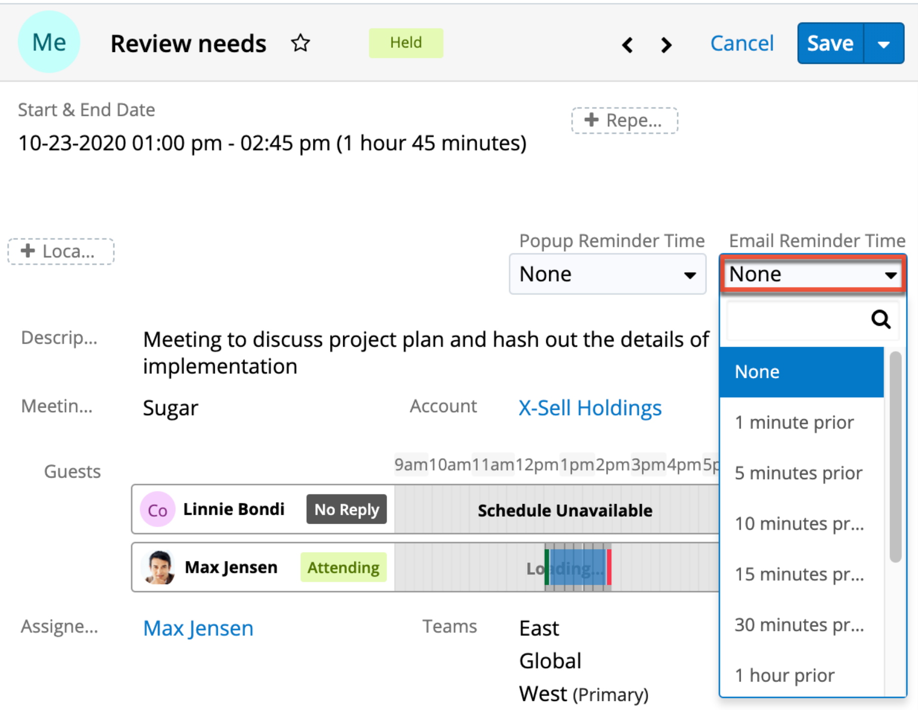
Sugar can remind guests when a meeting is scheduled to begin soon. Reminders can be sent via email to all of the guests or via pop-up to all user guests prior to the meeting's scheduled start date and time. By default, a user must set reminders when creating or editing the activity, but users can configure default reminders via their User Preferences, which will automatically set a default reminder time for meetings they create in Sugar.

Note: The instance's outbound mail server must be configured via Admin > System 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 Email documentation in the Administration Guide.

Email Reminders

Email reminders can be set for any meeting record relative to its start date and time. The reminders are emailed to all guests with valid email addresses including non-Sugar users.

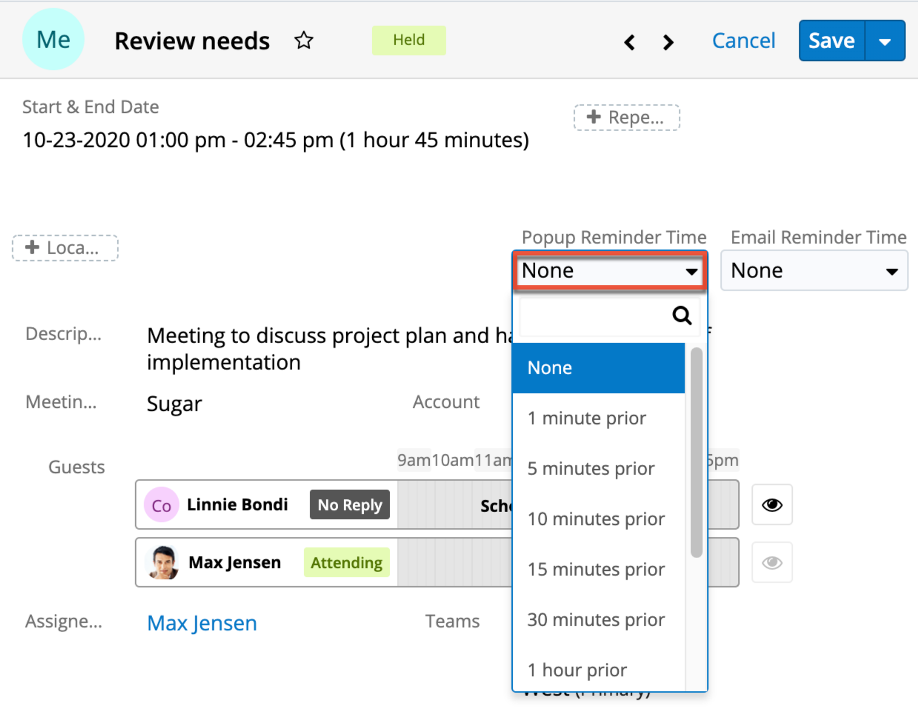
To schedule email reminders, select a time interval from the meeting's Email Reminder Time field:



Popup Reminders

Popup reminders can be set for any meeting record relative to its start date and time. Popup reminders appear for Sugar users on the meeting's guest list who are logged into Sugar in an open browser window at the time the reminder pops up.

To schedule popup reminders, select a time interval from the meeting's Popup Reminder Time field:



Closing Meetings

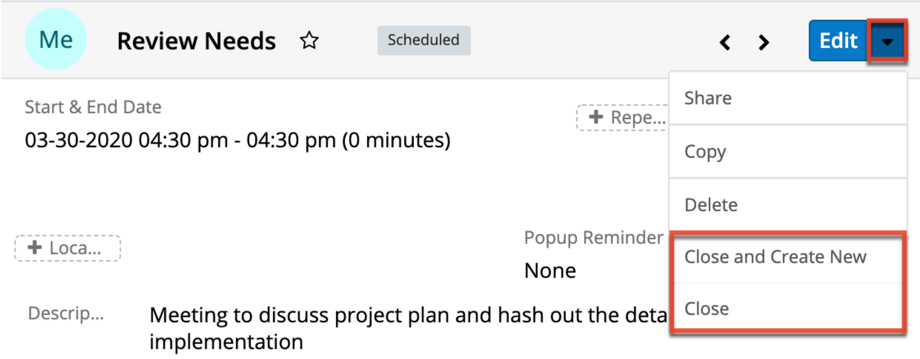
Once a meeting has taken place, a user can close the meeting record, which changes the meeting's status to "Held". The "Close" option only appears for meetings that are considered open, or not "Held". Open meetings are shown in the Planned Activities dashlet on the record view of related records and guests (e.g., Contacts, Leads, etc.). After closing a meeting, Sugar will move it from the Planned Activities dashlet to the History dashlet and the meeting record's status will display "Held" wherever it is viewed.

Closing via Record View

An open meeting's record view allows you to simply close the current meeting record or use "Close and Create New" to close the meeting and create a new meeting with the same details simultaneously. "Close and Create New" is often used when a user wants to log a completed meeting and easily schedule a follow-up meeting with the same people about the same topic.

To close a meeting record via its record view, click on the meeting to open its record view. Expand the record's Actions menu and select "Close" or "Close and

Create New".



Depending on your selection, you will experience different results:

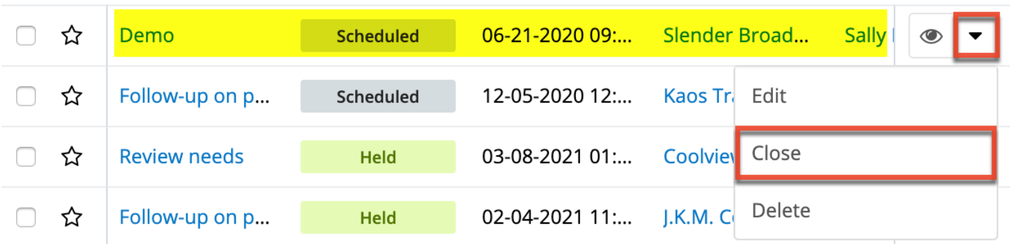
- **Close**: Instantly changes the meeting's status to "Held" and displays a Success message.
- **Close and Create New**: Instantly changes the meeting's status to "Held", displays a Success message, and opens a quick-create drawer for a new meeting record with the same values, guests, relationships. and other field values as the held meeting. The only field that is not copied from the original record is the status field, which will revert to "Scheduled" for the new meeting. Simply adjust the dates, times, and other information as needed, and save the new meeting as usual.

Once a meeting is closed, the closing options will no longer appear in the Actions menu.

Closing via List View

Use the following steps to close a meeting record via the list view:

1. Click the Meetings tab to navigate to the Meetings module's list view.
2. Use the [Module Search](#) to find the Meeting record(s) you wish to close.
3. Click the Record Actions Menu to the far right of the record's row and select "Close".

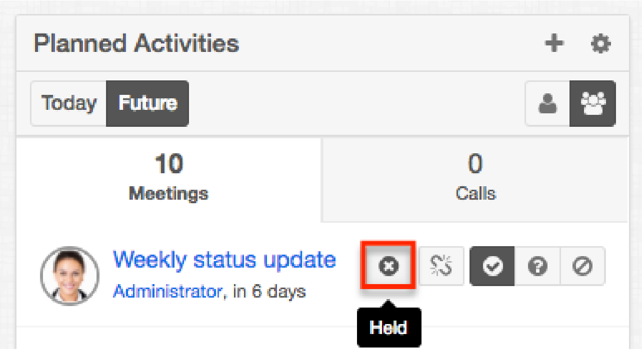


Sugar instantly changes the meeting's status to "Held" and displays a Success message.

Closing via Dashlet

The Planned Activities dashlet is available for home page dashboards and on the record view's intelligence pane for Sidecar modules. From the home page dashboard, the Planned Activities dashlet displays all upcoming calls and meetings assigned to you or your team depending on your chosen filters. When viewing the Planned Activities dashlet from a record's intelligence pane, the calls and meetings shown are only those that are related to the record you are viewing. For example, when viewing the contact record for Joe Smith, the Planned Activities dashlet in the intelligence pane will show only the upcoming calls and meetings with Joe Smith on the guest list. For more information about the Planned Activities dashlet, please refer to the Intelligence Pane documentation.

Use the following steps to close a meeting record via the Planned Activities dashlet:

1. Navigate to your home page's dashboard or the record view that contains the Planned Activities dashlet showing the meeting you would like to close.
2. If necessary, click the Meetings tab on the Planned Activities dashlet to find the meeting.
3. Click the Held (x) button to the right of the meeting's row in the dashlet.


4. A pop-up message will display asking for confirmation. Click "Confirm" to move the meeting to the record's History dashlet with the status "Held".

Working With Sugar Modules

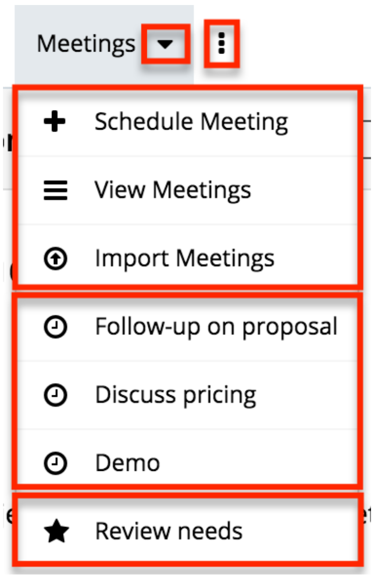
While the Meetings module has some features that only apply to meetings, it also uses the Sidecar user interface that most Sugar modules are based on. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Meeting Menus

The Meetings module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Meetings-specific functionality, within this page.

Module Tab Menus

The Meetings module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list, and you can click "Meetings" to access the list view. Once the Meetings tab displays on the navigation bar, you can click the triangle on the tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform certain actions within the module. The Recently Viewed menu displays the list of meetings you most recently viewed. The Favorites menu displays the list of meetings that you most recently marked as favorites.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Schedule Meeting	Opens the record 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.

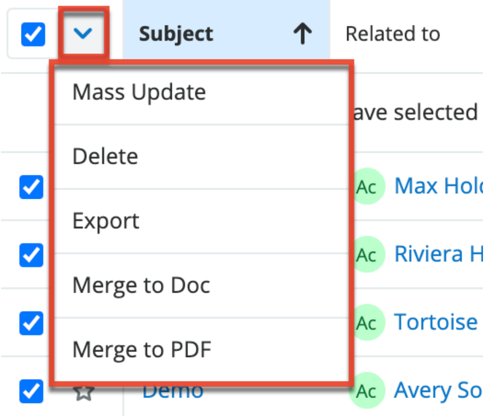
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Meetings list view displays all meeting records and allows for searching and filtering to locate specific meetings. You can see the basic details of each record within the field columns of the list view or click a meeting's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual meeting records or click the checkbox in the list header to select all records displayed on the current set of list view results.



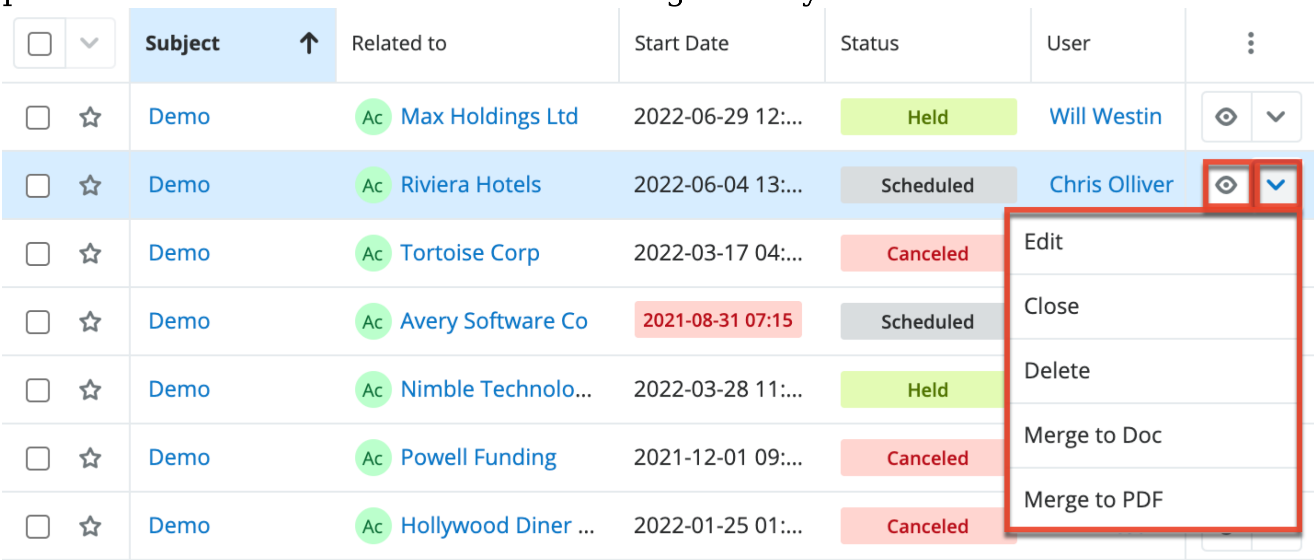
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more meetings at a time.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Delete	Delete one or more meetings at a time.
Export	Export one or more meetings to a CSV

	file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual meeting directly from the list view.



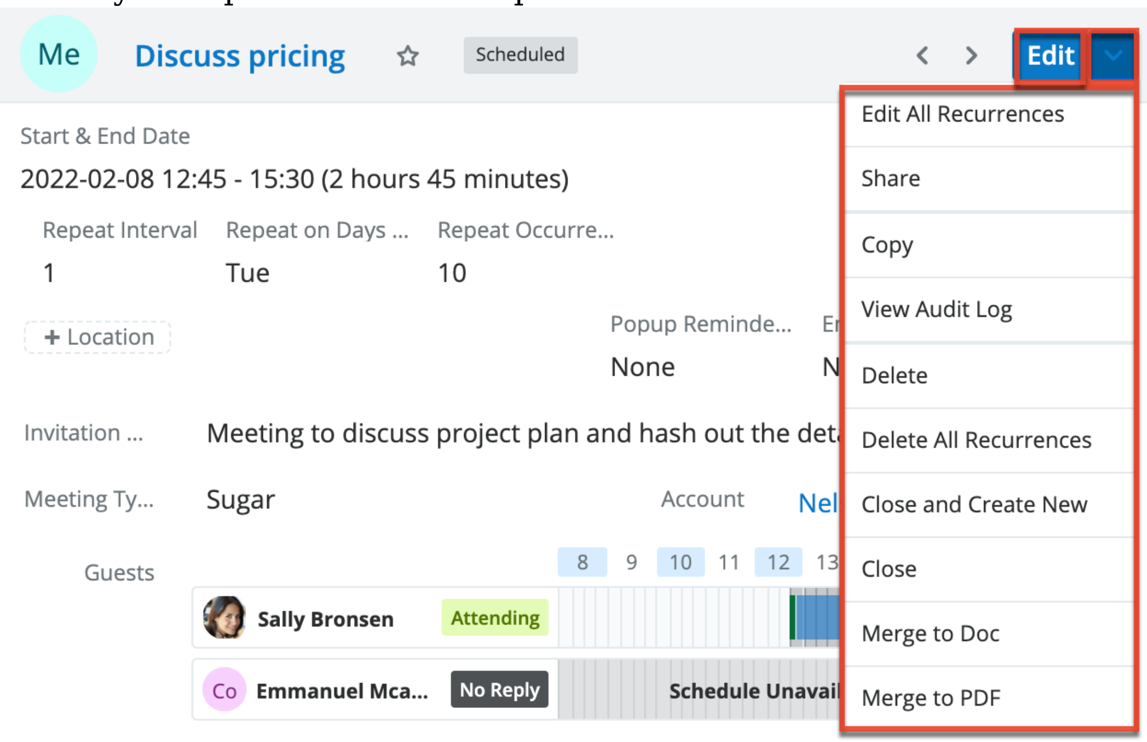
The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this meeting in the intelligence pane.
Edit	Edit this meeting.
Close	Close this meeting. **Note**: Shown only for meetings that do not have a status of "Held".
Follow	(Available if Activity Streams are

	enabled) Follow changes to this meeting in your activity stream.
Delete	Delete this meeting.
Delete All Recurrences	Delete this meeting and all other meeting records in this meeting's series. **Note**: Shown only for meetings that are one in a recurring series.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Meetings record view displays a single meeting in full detail including its fields, subpanels of related records, and activity stream. To access a meeting's record view, simply click a hyperlinked meeting name from anywhere within Sugar. The record view's Actions menu appears above the record's details and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this meeting.
Edit All Recurrences	Edit this meeting and all other meeting records in this meeting's series. **Note**: Shown only for meetings that are one in a recurring series.
Share	Share a link to this meeting via email.
Copy	Duplicate this meeting to create a new meeting.
View Audit Log	View a record of changes to this meeting.
Delete	Delete this meeting.
Delete All Recurrences	Delete this meeting and all other meeting records in this meeting's series. **Note**: Shown only for meetings that are one of a recurring series.
Close and Create New	Close this meeting as "Held" and create a new copy of the meeting. **Note**: Shown only for meetings that do not have a status of "Held".
Close	Close this meeting as "Held". **Note**: Shown only for meetings that do not have a status of "Held".
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to meetings.

General Instructions for Working With Sugar Modules	**Meetings-Specific Instructions**
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Meetings-specific help exists for each topic, use the links below to navigate to sections of the current page.
Creating Records	Creating Recurring Meetings Meeting Guests Meeting Reminders
Viewing Records	
Searching for Records	
List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	
Editing Records	Editing All Recurrences of a Meeting via Record View
Deleting Records	Deleting All Recurrences of a Meeting via Record View Deleting All Recurrences of a Meeting via List View Closing Meetings
Exporting Records	
Favoriting Records	
Following Records	
Sharing Records	
Viewing Record Audit Logs	The Viewing Record Audit Logs section describes the View Audit Log record view option which displays a history of changes to the meeting's audited fields.

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Calls

Overview

Sugar's Calls module is used to log phone calls which can be related to other Sugar records that may represent the attendees or topic for discussion. You can use call records to schedule and remind guests of future calls and to preserve a record of any other calls that you hold. Call records may have multiple guests and can even be scheduled to recur.

Calls logged in Sugar also show on your Sugar calendar, from which you can create calls directly. You can also view and create calls via the Planned Activities dashlet on a contact or other related module record. For example, a contact record's Planned Activities dashlet displays Sugar call records that are related to the contact. Creating a call from the dashlet creates a relationship between the records automatically.

This documentation covers using the Calls module. For general usage instructions concerning views and actions that are common across most Sugar modules such as creating, editing, and deleting records, please refer to the Working With Sugar Modules section of this page.

Please note that you can only 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.

Call Fields

The Calls module contains a number of stock fields that come out of the box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to meet your organization's needs. Administrators or users with developer-level role 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
Agent Sentiment	The agent's sentiment for the call, calculated by SugarPredict sentiment analysis. Possible values are "Positive", "Neutral", and "Negative", and these are accompanied by an icon representing the sentiment. The field name is displayed with a SugarPredict icon next

	to it and the field is read-only. See the SugarLive and Calls section below for details on the requirements to see sentiment analysis.
Assigned To	The Sugar user assigned to the call. **Note**: The user in the "Assigned to" field cannot be removed from a call's guest list.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
Created By	The Sugar user who created the call.
Customer Sentiment	The customer's sentiment for the call, calculated by SugarPredict sentiment analysis. Possible values are "Positive", "Neutral", and "Negative", and these are accompanied by an icon representing the sentiment. The field name is displayed with a SugarPredict icon next to it and the field is read-only. See the SugarLive and Calls section below for details on the requirements to see sentiment analysis.
Date Created	The date the call record was created.
Date Modified	The date the call record was last modified.
Direction	Indication of whether the call is inbound or outbound.
Email Reminder Time	Send a reminder email to all call guests a specified duration before the call's start time.
End Date	The date and time the call is expected to end.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the

	Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
Internal Notes	Notes about the meeting that are visible only to internal users.
Invitation Body	A description or other information about the meeting that is sent to meeting guests.
Modified By Name	The name of the user who last modified the call record.
Popup Reminder Time	Trigger a reminder popup alert to all Sugar user guests at a specified duration before the call's start time. **Note**: Users must be logged in to Sugar in an open browser window in order to receive the popup reminder.
Related To	The related module record associated with the call.
Repeat Type	For a recurring series of calls, the timespan unit (e.g., Every x days = "Daily", Every x weeks = "Weekly") to use for the interval of time between recurrences.
Repeat Interval	Shown when Repeat Type does not equal "None", the number of units in the "Repeat Type" field that should pass between recurrences, for example: • **Every three days**: Repeat Type = "Daily"; Repeat Interval = "3" • **Every other week**: Repeat Type = "Weekly"; Repeat Interval = "2" • **Each year**: Repeat Type = Yearly; Repeat Interval = "1"
Repeat	Shown when Repeat Type does not equal "None"; Select "Until" to set a hard end date to recurrences or "Occurrences" to specify the number of times to repeat the call.
Repeat Until	Shown when "Repeat" equals "Until", the date of the last occurrence in the

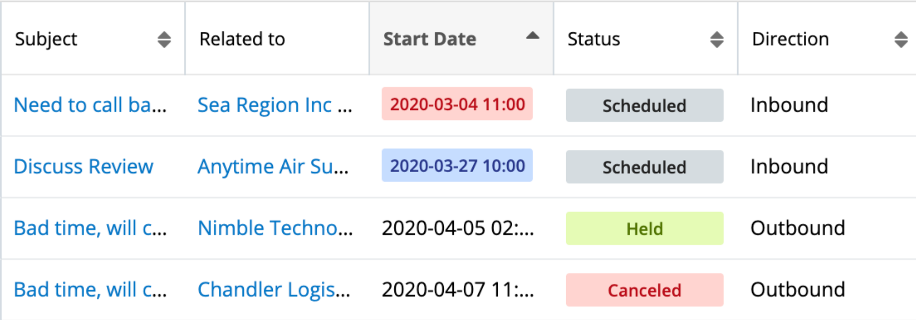
	series.
Repeat Occurrences	Shown when "Repeat" equals "Occurrences", the number of calls in the series.
Repeat on Days of Week	Shown when "Repeat Type" equals "Weekly", the day(s) of the week that the calls will occur in the recurring series.
Custom Date (monthly)	Shown when "Repeat Type" equals "Monthly", select "Each" to specify a certain day(s) of the month or "On the" to set a variable such as the first Monday of each month.
Custom Date (yearly)	Shown when "Repeat Type" equals "Yearly", select "None" to repeat the call on the same day every year or "On the" to set a variable such as the last Friday of each year.
Recording [1]	In Sugar Serve or Sugar Sell, this read-only field contains a link to a recording of the call if it took place in SugarLive and call recording has been configured by an admin. It may take a few minutes after the call has ended and the contact has been closed in SugarLive for the recording to become available. See the Amazon Web Services page in the Administration Guide for details on setting up call recording. **Note**: This field is not available in the Fields section of Studio.
Recording URL	This is the unformatted URL to the SugarLive call recording that is used to populate the Recording field with a user-friendly link. This field is hidden by default and only available in Sugar Serve or Sugar Sell. See the Amazon Web Services page in the Administration Guide for details on setting up call recording.
Start Date	The date and time that the call or first call in the series of recurring calls is scheduled to begin.

Status	This is the current status of the call record. The out-of-the-box values are "Scheduled", "In Progress", "Held", and "Canceled". When a call begins in SugarLive, the call record's status is set to "In Progress", and when it ends, the status is changed to "Held".
Subject	The name or topic used to identify the call.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the call record.
Transcript [1]	In Sugar Serve or Sugar Sell, this read-only field contains the transcript of the call if it took place in SugarLive and call transcripts have been configured by an admin. A sentiment value (e.g., "Positive") is included for each entry. It may take a few minutes or hours for the transcript to be populated after the call has ended, depending on the call length. See the Amazon Web Services page in the Administration Guide for details on setting up call transcripts.

[1] This field's value is only visible to Sugar Serve or Sugar Sell users; when this field appears on layouts, users without a supported license type will see a placeholder containing the text "License Required" instead of the field's value. See the User Management page for more details on license types.

Calls Color Codes

When viewing the Calls list view and the Calls dashlet, the start date may be highlighted in blue or red. This allows users to quickly view scheduled calls that are either overdue or start within the next 24 hours. Please note that the start date will not be highlighted for calls with a status of "Held" or with a start date in the future (beyond 24 hours from the current date and time).



Subject	Related to	Start Date	Status	Direction
Need to call ba...	Sea Region Inc ...	2020-03-04 11:00	Scheduled	Inbound
Discuss Review	Anytime Air Su...	2020-03-27 10:00	Scheduled	Inbound
Bad time, will c...	Nimble Techno...	2020-04-05 02:...	Held	Outbound
Bad time, will c...	Chandler Logis...	2020-04-07 11:...	Canceled	Outbound

The start dates in the Calls list view are highlighted as follows:

- **Blue**: The call has not been held and the start date occurs within the next 24 hours.
- **Red**: The call has not been held and the start date occurred in the past.

Please note that you can only 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

List View Filters

While universal list view filters are included with Sugar out-of-the-box, the following filters are unique to the Calls list view:

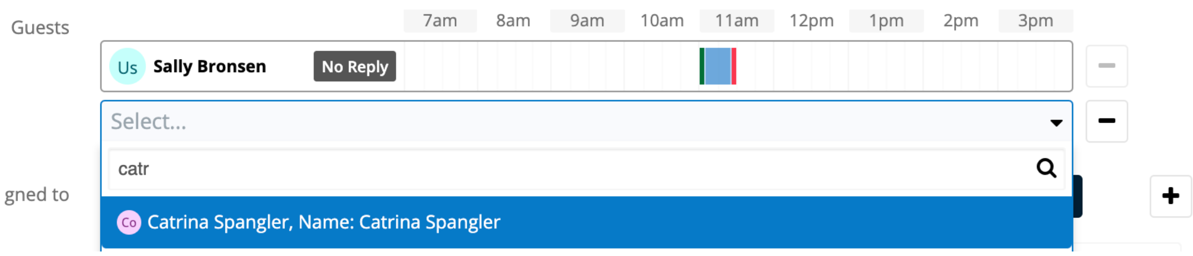
- **My Calls as Guest**: All calls for which you are a guest, either because you are a non-removable guest by virtue of being the assigned-to user or because you have been invited and not declined the invitation. All call status types are included in this filter (scheduled, held, canceled).
- **My Calls as Owner**: All calls for which you are the assigned-to user. All call status types are included in this filter (scheduled, held, canceled).
- **Scheduled Calls as Guest**: All calls with a "Scheduled" status for which you are a guest, either because you are a non-removable guest by virtue of being the assigned-to user or because you have been invited and not declined the invitation.
- **Scheduled Calls as Owner**: All calls with a "Scheduled" status for which you are the assigned-to user.

Call Guests

The following guests are automatically added to a call's guest list:

Automatic Guest	To Remove the Guest
The lead or contact in the "Related to" field, if any	This guest can be removed from the guest list at any time. If a lead or contact record is related to a call but is not on the guest list, then you will not see the call in the person's Calls subpanel.
The user who created the call	This guest can be removed from the guest list after initially saving the call. Create and save the call, click "Edit", and then click the Remove (-) button next to the created-by user's row in the Guests panel.
The user in the "Assigned to" field for the call record	The assigned user cannot be removed from the guest list. If you need to remove the assigned user from the guest list, you must first re-assign the call to a different user. Once the call record is assigned to a new user, the original user will remain a guest until removed via the Remove (-) button.

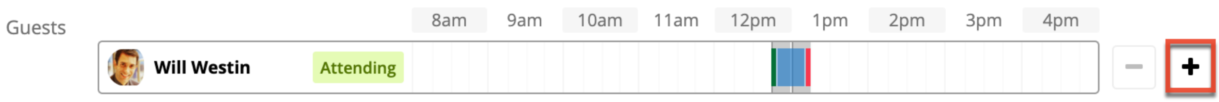
Users may add additional guests (e.g., contacts, leads, users) to calls [via the Guests panel](#) in the call's record view.



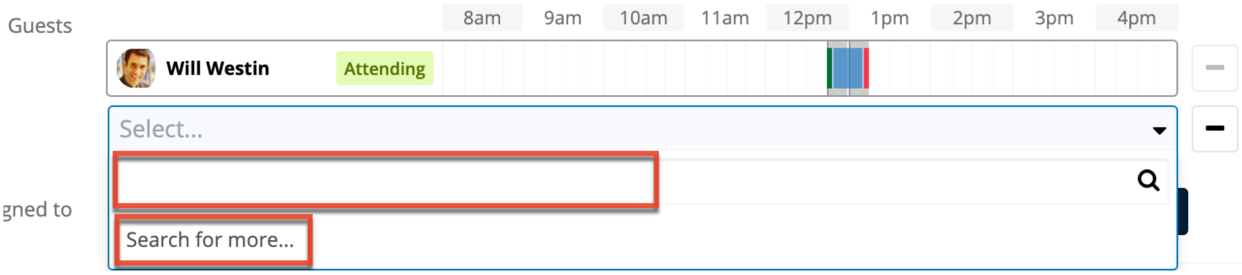
Adding via the Guests Panel

Use the following steps to add attendees via the Guests panel:

1. Navigate to the Calls module and create a new record or edit an existing record.
2. Scroll to the Guests panel and click on the Add (+) button located on the far right.

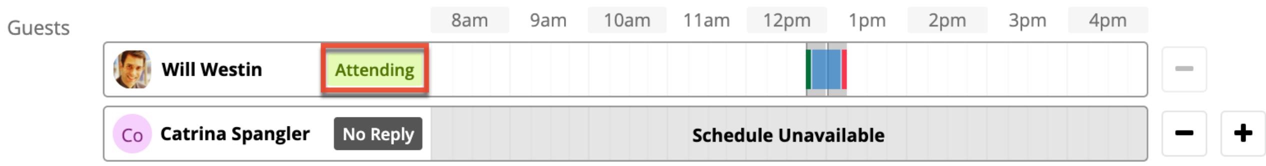


3. To add a guest, type in the name of the lead, contact, or user via the search bar that appears or select "Search for more..." to search the Contacts list view. To remove a guest, click the Remove (-) button to the right of the guest's row.
Note: The user in the "Assigned to" field on the call record cannot be removed from a call. To remove the assigned user from the guest list, re-assign the call to a different user first.



4. Click "Save" or "Save and Send Invites" if you would like Sugar to send email invitations to the guests.
Note: Confirm that the guests' Sugar records have valid email addresses prior to clicking "Save and Send Invites". If a guest has no email address or their email address is marked as invalid, Sugar cannot email them an invitation to the call. A message and icon will alert you when adding the guest and when viewing the call's record view.

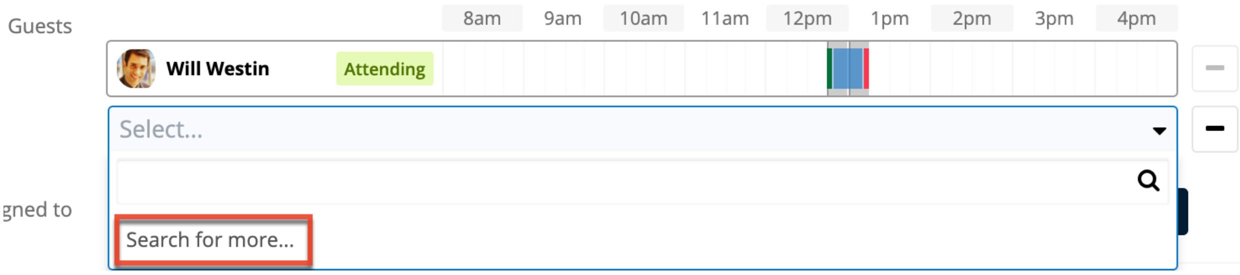
Once the guest has responded to the email invitation, their acceptance status will appear as a color-coded badge next to their name.



Adding via Create a Guest

Use the following steps to create a new contact and add them as a call guest:

1. Navigate to the Calls module and create a new record or edit an existing record.
2. Scroll to the Guests panel, click on the Add (+) button, and then click on "Search for more..." to expand the Contacts list view.



3. At the top of the list view, click the Create button and fill out the appropriate fields to create a new contact. Once completed, save the new contact record and Sugar will automatically add the contact to the guest list for the call.
4. Confirm the remaining fields and guests are configured appropriately and then save the call.

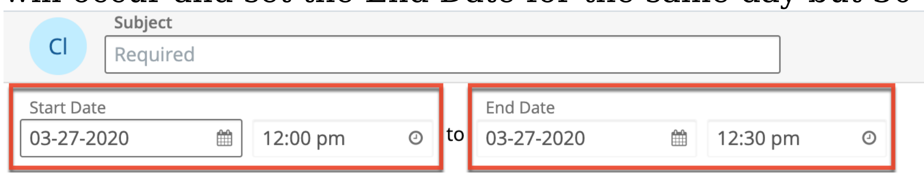
Recurring Calls

Calls can be saved as recurring events so that users do not have to create individual call records for regularly occurring events. Recurrences may occur daily, weekly, monthly, or yearly. When a recurring call is saved, Sugar creates a series of individual call records so that all recurrences appear in the Calls List View.

Creating Recurring Calls

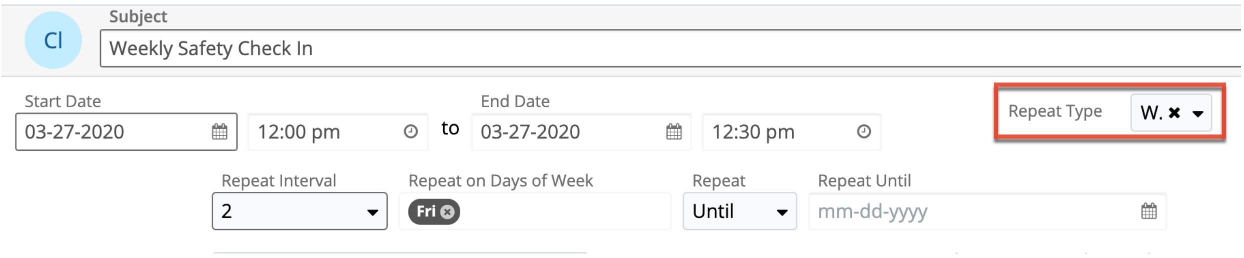
To schedule a series of recurring calls, follow the instructions below. As an example, we will schedule a 30-minute call that recurs every other Thursday until the end of the 2017 calendar year.

1. Navigate to the Calls module and create a new record.
2. In the Start Date field, enter the date and time that the first Thursday call will occur and set the End Date for the same day but 30 minutes later.

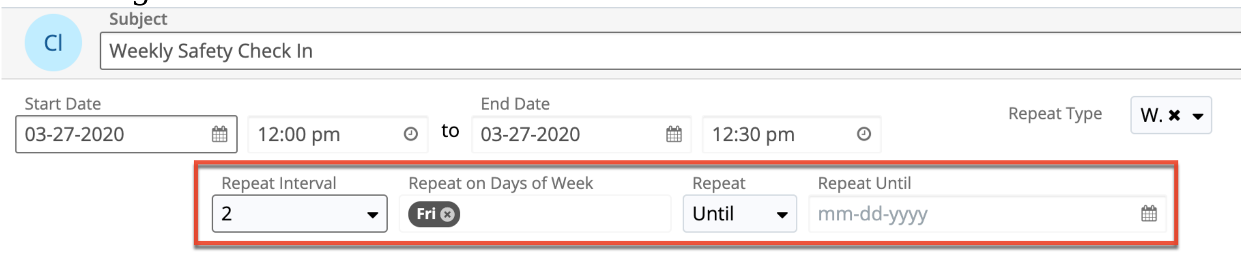


Note: If a recurring call's start date does not match the call's recurrence day(s) of the week, the start date will reset to the first matching day-of-week after the call's Date Created.

3. To create a series of calls, expand the field labeled "Repeat Type" and select an interval from the dropdown list. Our use case requires an interval of weeks (e.g., every two weeks), so we will select "Weekly" and specify our interval number in the next step.



4. Upon choosing a Repeat Type value, a new row of fields will appear on the form to gather the series information.

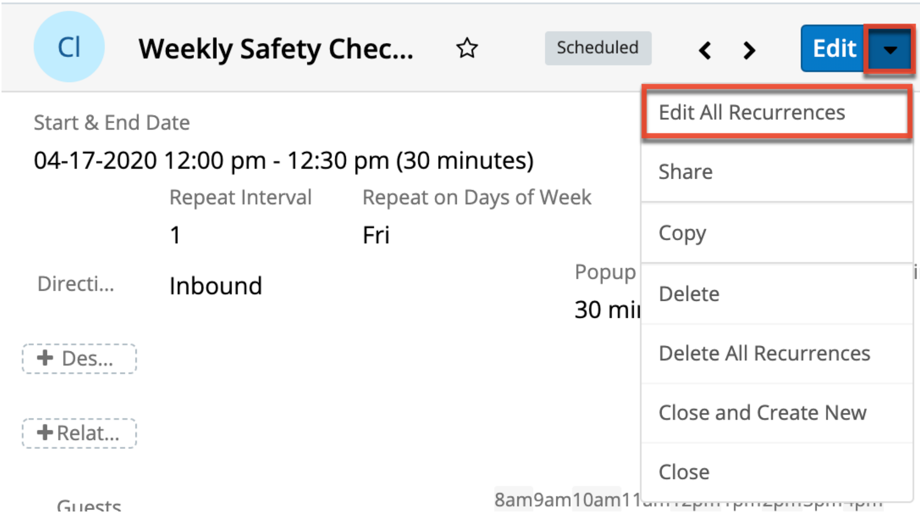


The fields displayed are dependent upon the values you select as you go. Please refer to the Call Fields section for complete details on the available options. To schedule a call that recurs every other Thursday until the end of the 2017 calendar year, set the following values:
   - **Repeat Interval**: 2
   - **Repeat on Days of Week**: Thu
   - **Repeat**: Until
   - **Repeat Until**: 2017-12-31
5. Confirm that the remaining fields and guests are configured appropriately.
6. Save the record and confirm that all recurrences appear as separate records in the Calls module's list view.

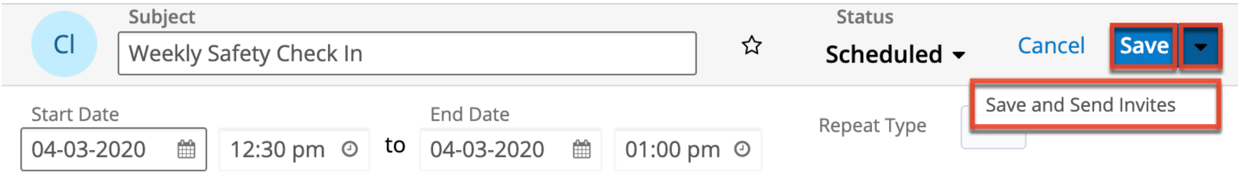
Editing All Recurrences via Record View

Recurring activities will display the option to edit all occurrences of the activity in the record's actions menu. This option will affect all of the call records in a series, even if some of the calls have been closed and set to "Held". Use the following steps to edit all recurrences in a series of calls via the record view:

1. Navigate to the record view of any call in the series of recurring calls.
2. Select "Edit All Recurrences" from the Actions menu.



3. Edit the call record as needed.

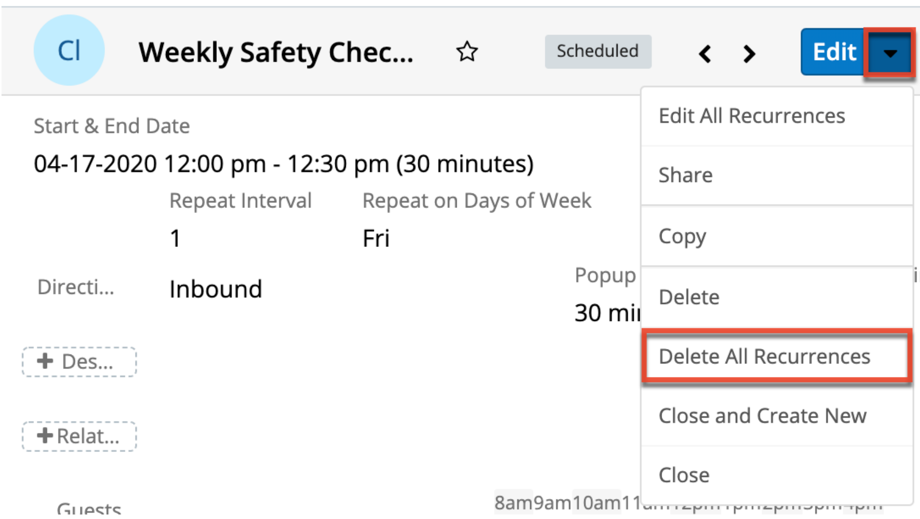


4. Then click on "Save" or "Save and Send Invites" to apply the changes to all held and unheld calls in the series.

Deleting All Recurrences via Record View

Recurring activities will display the option to delete all occurrences of the activity in the record's actions menu. This option will affect all of the call records in a series, even if some of the calls have been closed and set to "Held". Use the following steps to delete all recurrences in a series of calls via the record view:

1. Navigate to the record view of any call in the series of recurring calls.
2. Select "Delete All Recurrences" from the Actions menu.

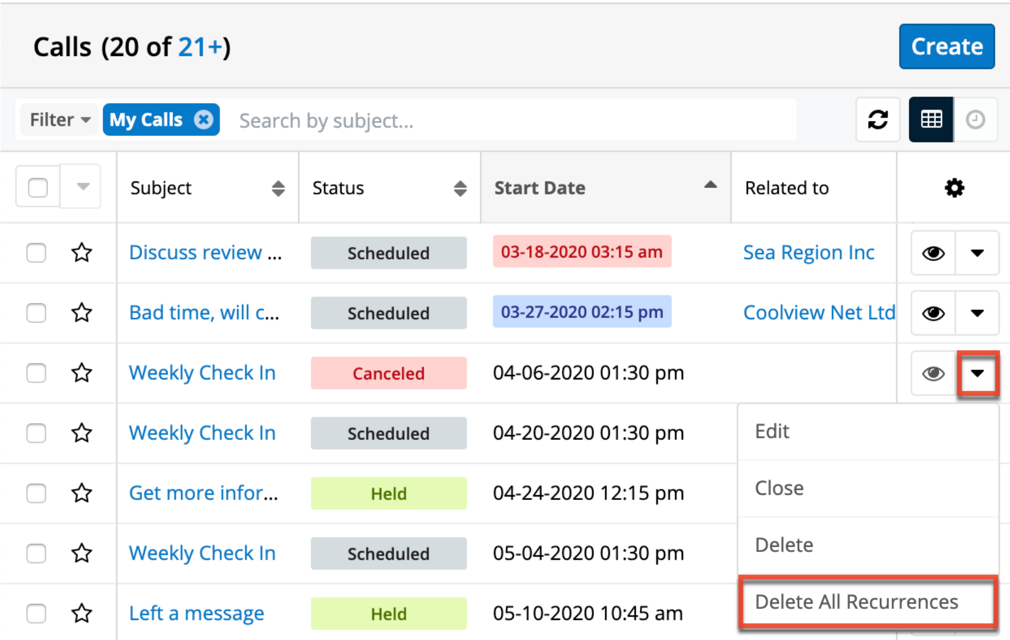


3. A pop-up message will display asking for confirmation. Click "Confirm" to

delete all held and unheld calls in the series.

Deleting All Recurrences via List View

Recurring activities will display the option to delete all occurrences of the activity in the record's actions menu in the list view. This option will affect all of the call records in a series, even if some of the calls have been closed and set to "Held". Use the following steps to delete all recurrences in a series of calls via the list view:

1. Navigate to the Calls list view by clicking the Calls module tab.
2. Use the Module Search to find the call in the series of recurring calls that you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete All Recurrences".


4. A pop-up message will display asking for confirmation. Click "Confirm" to delete all held and unheld calls in the series.

Call Reminders

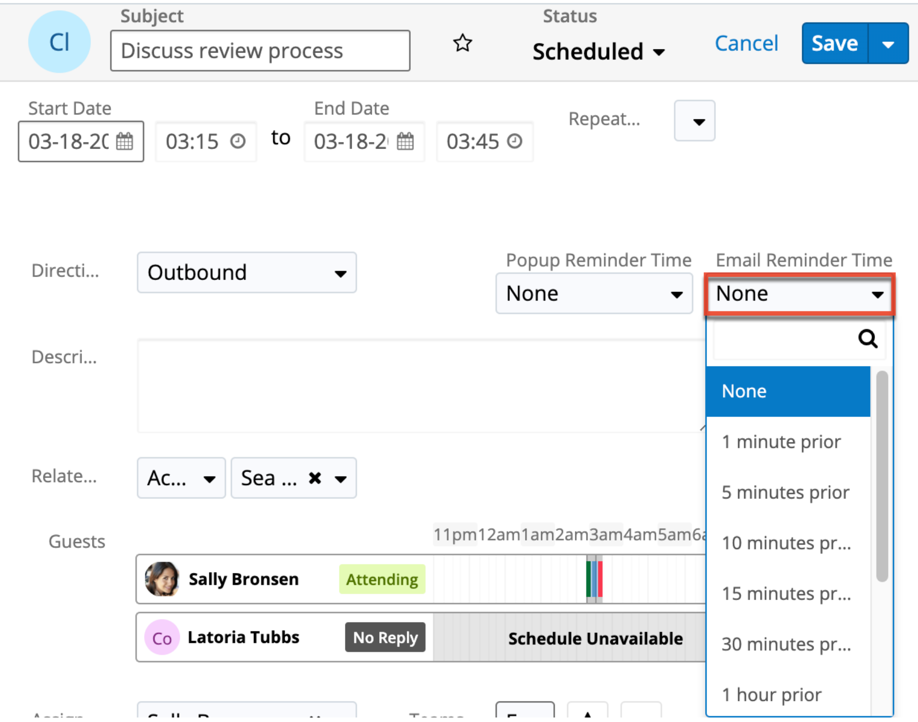
Sugar can remind guests when a call is scheduled to begin soon. Reminders can be sent via email to all of the guests or via pop-up to all user guests prior to the call's scheduled start date and time. By default, a user must set reminders when creating or editing the activity, but users can configure default reminders via their User Preferences, which will automatically set a default reminder time for calls they create in Sugar.

Note: The instance's outbound mail server must 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 Email documentation in the Administration Guide.

Email Reminders

Email reminders can be set for any call record relative to its start date and time. The reminders are emailed to all guests with valid email addresses including non-Sugar users.

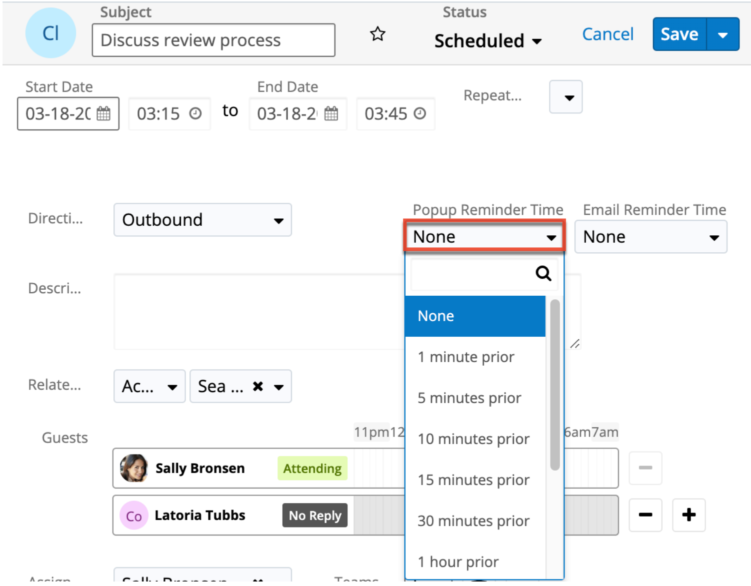
To schedule email reminders, select a time interval from the call's Email Reminder Time field:



Popup Reminders

Popup reminders can be set for any call record relative to its start date and time. Popup reminders appear for Sugar users on the call's guest list who are logged into Sugar in an open browser window at the time the reminder pops up.

To schedule popup reminders for logged-in Sugar users, select a time interval from the call's Popup Reminder Time field:



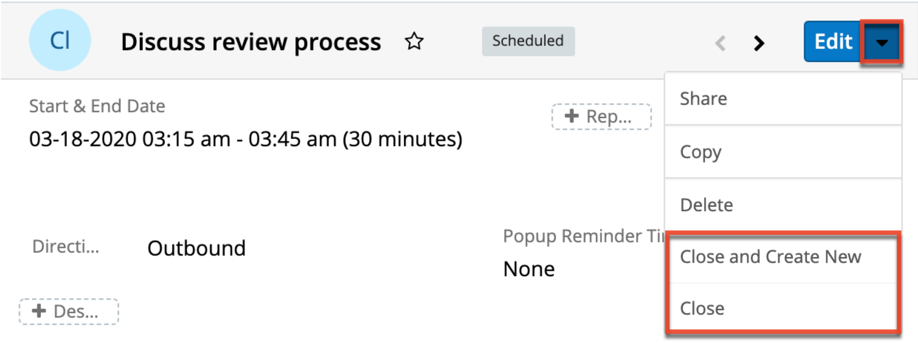
Closing Calls

Once a call has taken place, a user can close the call record, which changes the call's status to "Held". The "Close" option only appears for calls that are considered open, or not "Held". Open calls are shown in the Planned Activities dashlet on the record view of related records and guests (e.g., Contacts, Leads, etc.). After closing a call, Sugar will move it from the Planned Activities dashlet to the History dashlet and the call record's status will display "Held" wherever it is viewed.

Closing via Record View

An open call's record view allows you to simply close the current call record or use "Close and Create New" to close the call and create a new call with the same details simultaneously. "Close and Create New" is often used when a user wants to log a completed call and easily schedule a follow-up call with the same people about the same topic.

To close a call record via its record view, click on the call to open its record view. Expand the record's Actions menu and select "Close" or "Close and Create New".



Depending on your selection, you will experience different results:

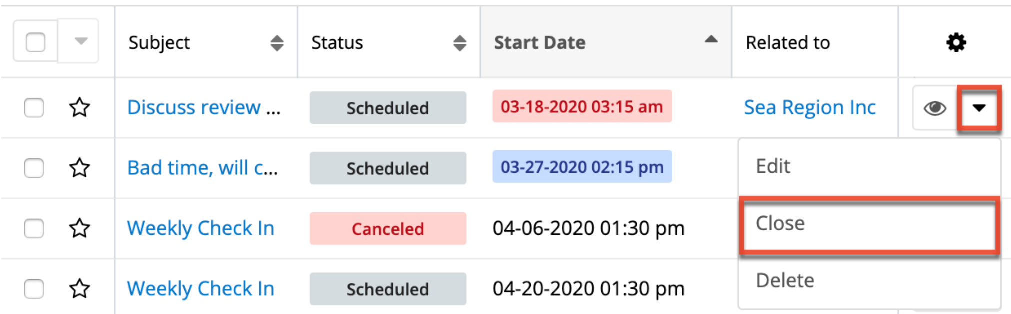
- **Close**: Instantly changes the call's status to "Held" and displays a Success message.
- **Close and Create New**: Instantly changes the call's status to "Held", displays a Success message, and opens a quick-create drawer for a new call record with the same values, guests, relationships. and other field values as the held call. The only field that is not copied from the original record is the status field, which will revert to "Scheduled" for the new call. Simply adjust the dates, times, and other information as needed, and save the new call as usual.

Once a call is closed, the closing options will no longer appear in the Actions menu.

Closing via List View

Use the following steps to close a call record via the list view:

1. Click the Calls tab to navigate to the Calls module's list view.
2. Use the Module Search to find the Call record(s) you wish to close.
3. Click the Record Actions Menu to the far right of the record's row and select "Close".



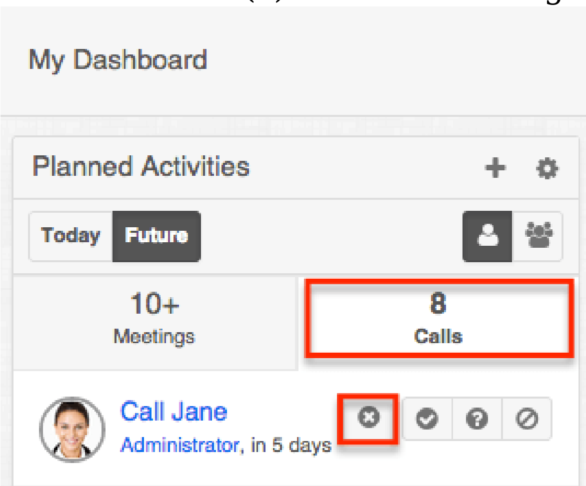
Sugar instantly changes the call's status to "Held" and displays a Success message.

Closing via Dashlet

The Planned Activities dashlet is available for home page dashboards and on the record view's intelligence pane for Sidecar modules. From the home page dashboard, the Planned Activities dashlet displays all upcoming calls and meetings assigned to you or your team depending on your chosen filters. When viewing the Planned Activities dashlet from a record's intelligence pane, the calls and meetings shown are only those that are related to the record you are viewing. For example, when viewing the contact record for Joe Smith, the Planned Activities dashlet in the intelligence pane will show only the upcoming calls and meetings with Joe Smith on the guest list. For more information about the Planned Activities dashlet, please refer to the Intelligence Pane documentation.

Use the following steps to close a call record via the Planned Activities dashlet:

1. Navigate to your home page's dashboard or the record view that contains the Planned Activities dashlet showing the call you would like to close.
2. If necessary, click the Calls tab on the Planned Activities dashlet to find the call.
3. Click the Held (x) button to the right of the call's row in the dashlet.



4. A pop-up message will display asking for confirmation. Click "Confirm" to move the call to the record's History dashlet with the status "Held".

SugarLive and Calls

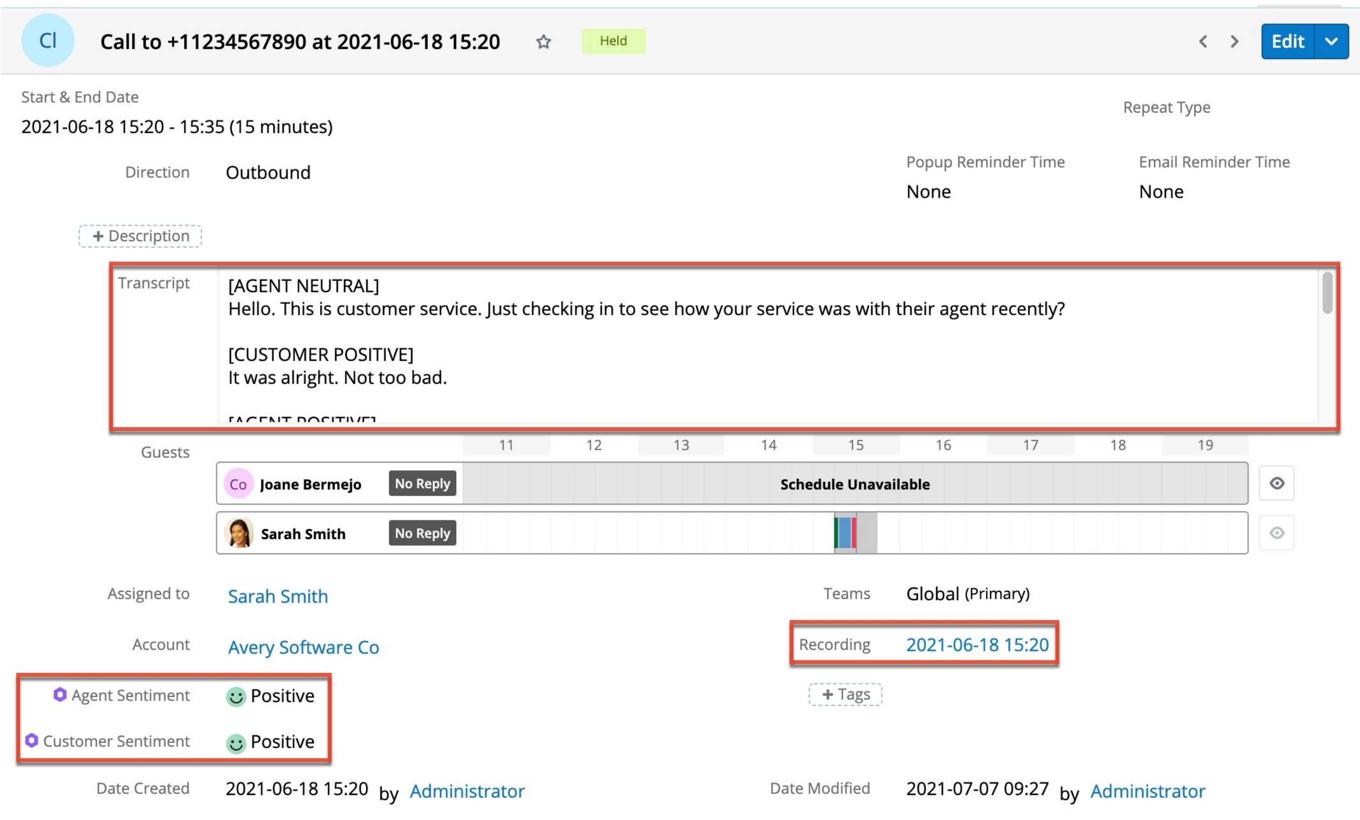
SugarLive automatically creates call records for calls that take place in SugarLive. The Start Date and End Date fields are set to the start and end times of the call, the Direction field is set to "Inbound" or "Outbound" based on the type of call, and the record is assigned to the agent. While the call is in progress, its status is set to "In Progress", and once finished, the status is changed to "Held".

The Related To flex relate field is populated with the record linked to the SugarLive session, and the contact or lead linked to the session is added as a guest. These links could be automatically selected by SugarLive or manually selected by the user. See the [SugarLive](#) page for details on linking records to calls.

If you wish to update any of the values on the call record after you have closed the SugarLive session, you can do so by opening it in the Calls module and editing it as normal.

If an admin has configured SugarLive call recordings to be saved in Sugar using AWS Lambda, the Recording field on the call is populated with a link to the recording when the call ends. However, the recording is not actually available using that link until after you have cleared the contact in SugarLive. Once you do this, the recording usually becomes available within a few minutes. See the Amazon Web Services documentation for the steps necessary to set up call recording.

In addition, if an admin has configured SugarLive call transcripts to be saved in Sugar using Contact Lens in Amazon Connect, the transcript and the agent and customer sentiment values are saved on the record after the call has ended. The Transcript field is populated with the conversation transcript and the Agent Sentiment and Customer Sentiment fields are populated with the sentiment ("Positive", "Neutral", or "Negative") along with an icon representing this sentiment, as calculated by SugarPredict sentiment analysis. The two sentiment fields have the SugarPredict icon displayed next to the field name. Note that it can take a while for the transcript to be generated and analyzed; this process takes more time for longer calls, but a short call may be ready in less than an hour. Either way, the Transcript, Agent Sentiment, and Customer Sentiment fields will be populated once the transcript is ready and has been analyzed. See the Amazon Web Services documentation for the steps necessary to set up call transcripts and sentiment analysis.



The Agent and Customer Sentiment fields are not displayed by default and must be added to layouts by an admin. To see sentiment evaluations on the Calls card in the Timeline dashlet, an admin must add the field to the Preview View layout in Studio. Note that only the customer's sentiment evaluation is shown in the Timeline dashlet. Additionally, the Agent Sentiment and Customer Sentiment fields are available for evaluation in SugarBPM.

Working With Sugar Modules

While the Calls module has some features that only apply to meetings, it also uses the Sidecar user interface that most Sugar modules are based on. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

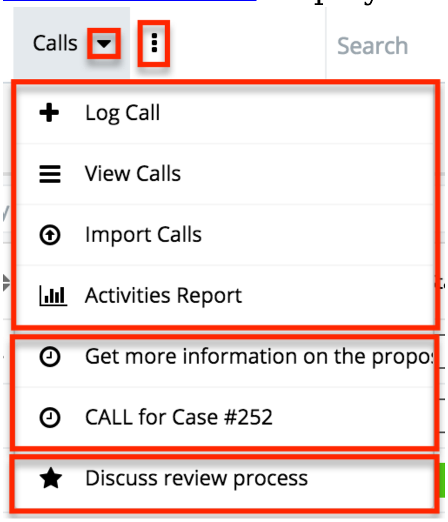
Call Menus

The Calls module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the

User Interface documentation or, for Calls-specific functionality, within this page.

Module Tab Menus

The Calls module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Calls" to access the list view. Once the Calls tab is visible in the navigation bar, you can click the triangle 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 calls you most recently viewed. The Favorites menu displays the list of calls you most recently marked as favorites.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Log Call	Opens the record 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.
Activities Report	Displays existing reports based on the Calls module.

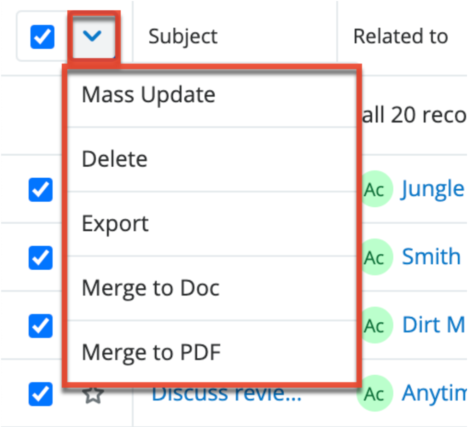
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Calls list view displays all call records and allows for searching and filtering to locate specific calls. You can view the basic details of each record within the field columns of the list view or click a call's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual call records or click the checkbox in the list header to select all records displayed on the current set of list view results.



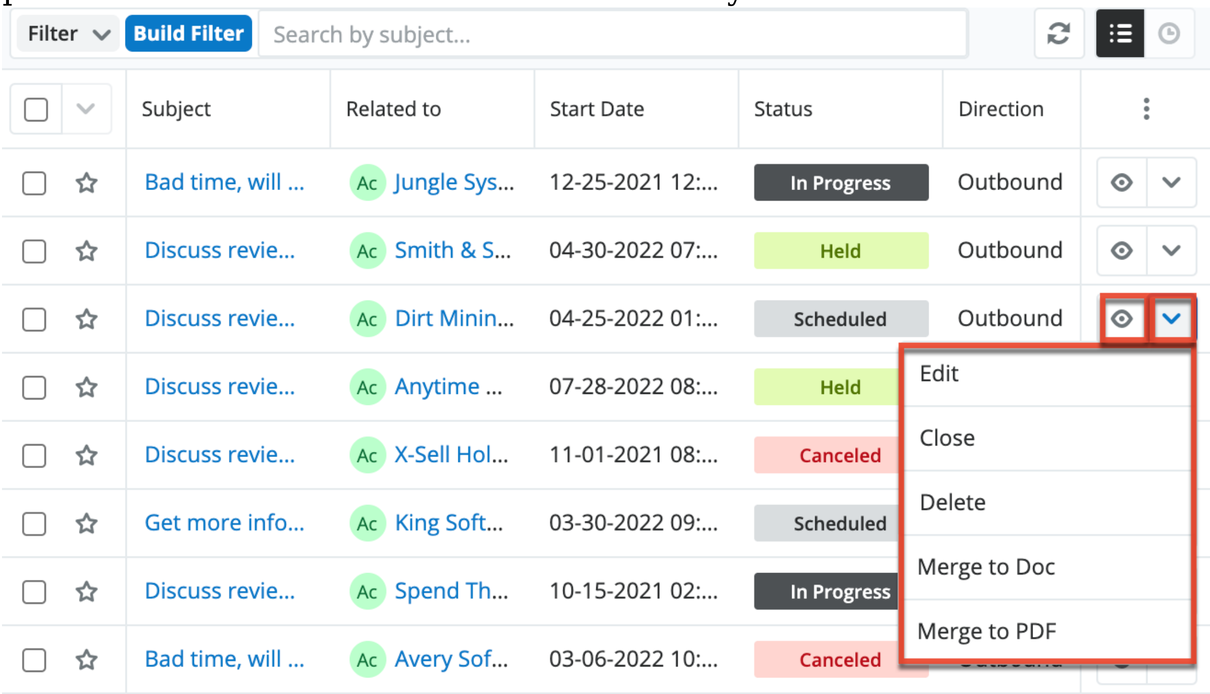
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more calls at a time.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Delete	Delete one or more calls at a time.
Export	Export one or more calls to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.

Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual call directly from the list view.



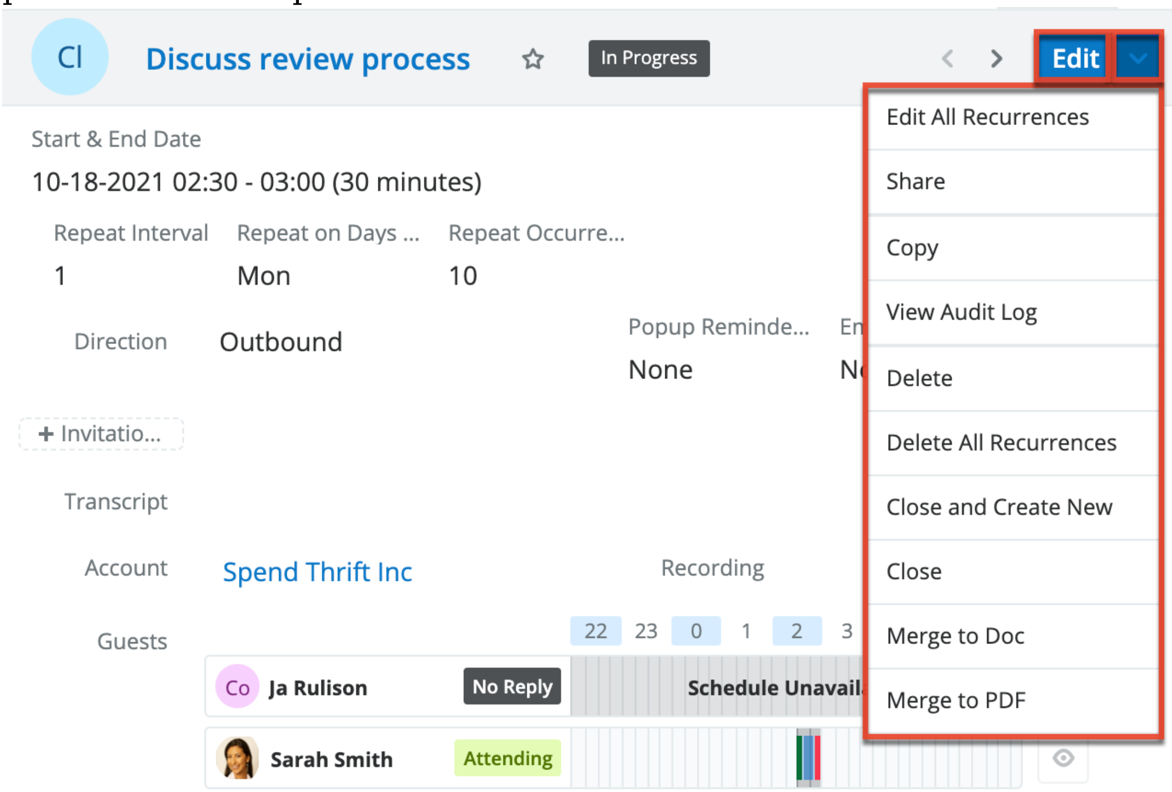
The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this call in the intelligence pane.
Edit	Edit this call.
Close	Close this call. **Note**: Shown only for calls that do not have a status of "Held"
Follow	(Available if Activity Streams are enabled) Follow changes to this call in your activity stream.
Delete	Delete this call.

Delete All Recurrences	Delete this call and all other call records in this call's series. **Note**: Shown only for calls that are one in a recurring series
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Calls record view displays a single call in full detail including its fields, subpanels of related records, and activity stream. To access a call's record view, simply click a hyperlinked call name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this call.
Edit All Recurrences	Edit this call and all other call records in this call's series. **Note**: Shown only for calls that are one in a recurring series.
Share	Share a link to this call via email.
Copy	Duplicate this call to create a new call.
View Audit Log	View a record of changes to this call.
Delete	Delete this call.
Delete All Recurrences	Delete this call and all other call records in this call's series. **Note**: Shown only for calls that are one of a recurring series.
Close and Create New	Close this call as "Held" and create a new copy of the call. **Note**: Shown only for calls that do not have a status of "Held".
Close	Close this call as "Held". **Note**: Shown only for calls that do not have a status of "Held".
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules.

Content Link	Description
Creating Calls Basic Call Creation	The Creating Records section covers the various methods of creating new call

Creating via Quick Create Creating via Subpanels Creating via Duplication Importing Calls	records, including via the Create button in the Calls module, the Quick Create menu on the upper right of every Sugar page, via the Calls subpanel on related module records, duplication of an existing call record, and importing a list of calls into Sugar using a .csv spreadsheet.
Viewing Calls Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Dashlets Viewing via Activity Streams Viewing via Preview Viewing via Reports	The Viewing Records section describes the various methods of viewing call records, including via the Calls list view and record view, the Recently Viewed menu in the Calls module tab, list view dashlets showing call information, activity stream entries concerning call updates or where a user mentions a call, previewing calls in the right-hand side panel, and reports displaying call data.
Searching for Calls Global Search List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to the two searching methods for locating calls: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Calls module.
Calls List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview Record Actions Menu More Calls Activity Stream Dashboards	The List View section walks through the many elements of the Calls List View layout which contains a filterable list of all call records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Calls list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.
Calls Record View Favorite Designation Following Designation	The Record View section walks through the many elements of the Calls Record View layout which contains detailed

Next or Previous Record Actions Menu Show More Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Activity Stream Dashboards	information about a single call record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Calls record view are described in the Record View Actions Menu section of this page.
Editing Calls Editing Inline via Record View Editing via Record View Editing Inline via Subpanels Editing Inline via List View Mass Editing via List View	The Editing Records section describes the various methods of editing existing call records, including inline via the Calls record view, in full edit mode on the record view, inline via the Calls subpanel on related module records, inline via the Calls list view, and via the Mass Update option on the list view.
Deleting Calls Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted calls, including via the Calls record view, an individual record's Actions menu on the Calls list view, and the Mass Actions menu on the list view.
Exporting Calls	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of calls and all their data as a .csv file for use outside of Sugar (e.g., in Microsoft Excel).
Favoriting Calls Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking calls as favorites, including via the Calls list view, Calls record view, or any Calls subpanel appearing on the record view of a related module. Favoriting a call allows you to easily access it from list views, dashlets, or the Calls module tab.
Following Calls Following via List View Following via Record View	The Following Records section describes the various methods of marking calls as "Following" including via the Calls list view and record view. Following a call causes its activity stream updates to be included on your Home page and Calls

	list view activity streams so that you can easily keep up with changes and user posts on the record.
Sharing Calls	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the call record. If the recipient is logged into Sugar, clicking the link will bring them directly to the call's record view.
Viewing Call Audit Logs	The Viewing Record Audit Logs section describes the View Audit Log record view option which displays a history of changes to the call's audited fields.

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Tasks

Overview

Sugar's Tasks module is used to track to-do or action items which can be related to various Sugar records to which the task is relevant. Tasks with due dates will display a color coding on list views and dashlets to help alert users when a task is overdue or will be due soon. You can view tasks in specialized dashlets on related records as well as in your calendar to help you plan your workday and complete important action items on time. As tasks are completed, they can be closed via various convenient methods throughout Sugar. This documentation will cover information and actions specific to the Tasks module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting calls, please refer to the Working With Sugar Modules section of this page.

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 documentation in the Administration Guide.

Task Fields

The Tasks module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role 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.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
Contact Name	The contact record the task is related to. **Note**: The task will appear in either the contact's Active Tasks dashlet or Inactive Tasks dashlet in the intelligence pane.
Date Created	The date the task record was created.
Date Modified	The date the task record was last modified.
Description	A description or other information about the task.
Due Date	The date and time the task is due to be completed. **Note**: The task will appear on the assigned user's Calendar per the date and time of the task.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the

	Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
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**: The task will appear in either the Active Tasks dashlet or Inactive Tasks dashlet of the selected module record's intelligence pane or the Activities subpanel or History subpanel (BWC modules only).
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.). **Note**: Closing a task will automatically set the status to "Completed".
Subject	The subject or a brief summary of the task.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the task record.

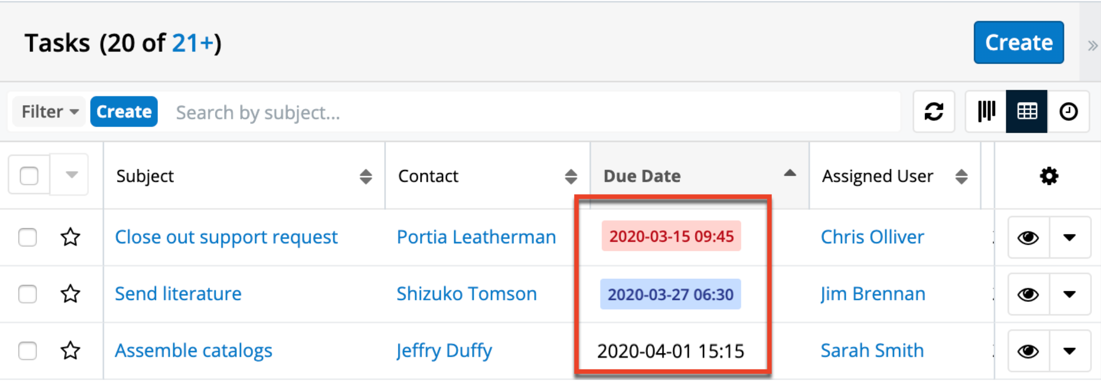
Task Due Date Colors

When viewing the Tasks list view or Tasks dashlet, the due date will be highlighted in one of two colors: blue or red. This allows users to quickly recognize scheduled tasks that are either overdue or due within the next 24 hours.

Task due dates are highlighted in list view and dashlets as follows:

- **Blue**: Tasks with any status other than "Completed" with a due date in the

next 24 hours.
- **Red**: Tasks with any status other than "Completed" with a due date that has passed.
- **No color**: Tasks with a status of "Completed" or with a due date 24 hours or more in the future.



Task Dashlets

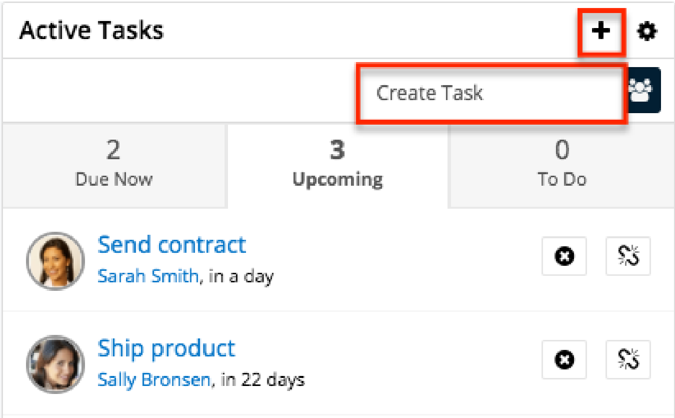
Dashlets showing task records can be added to your Home page, list view intelligence panes, and record view intelligence panes. The List View dashlet is a basic dashlet that allows you to select the Tasks module and create a filter so that the dashlet displays tasks that meet your filter criteria. For more information on list view dashlets, please refer to the Dashboards and Dashlets documentation.

Sugar also offers two dashlets with specific task-related functionality: the Active Tasks dashlet and the Inactive Tasks dashlet, which are briefly explained in the following sections.

Active Tasks Dashlet

The Active Tasks dashlet displays all tasks in a status of "Not Started", "In Progress", and "Pending Input" with the tasks broken into three tabs based on their due dates and adjacent buttons for performing actions on the tasks. When used on a related module's record view, the dashlet becomes contextual, and only shows tasks that are relevant to the current record.

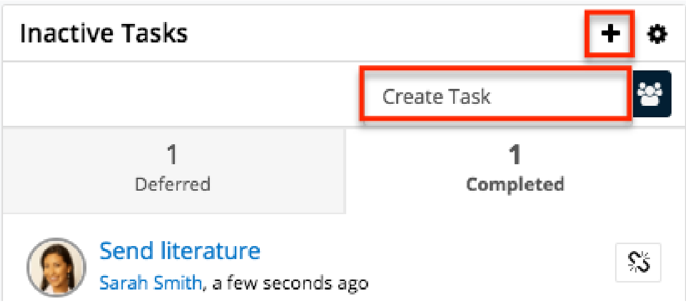
For complete information regarding the Active Tasks dashlet, please refer to the Dashboards and Dashlets documentation.



Inactive Tasks Dashlet

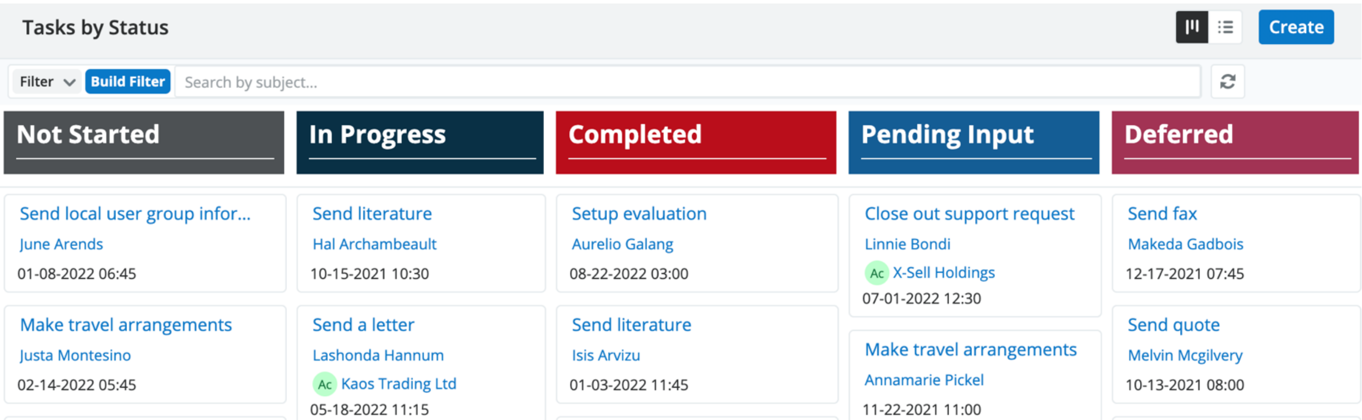
The Inactive Tasks dashlet displays all tasks in a status of "Completed" or "Deferred" with the tasks broken into two tabs based on their statuses and adjacent buttons for performing actions on the tasks. When used on a related module's record view, the dashlet becomes contextual, and only shows tasks that are relevant to the current record.

For complete information regarding the Inactive Tasks dashlet, please refer to the Dashboards and Dashlets documentation.

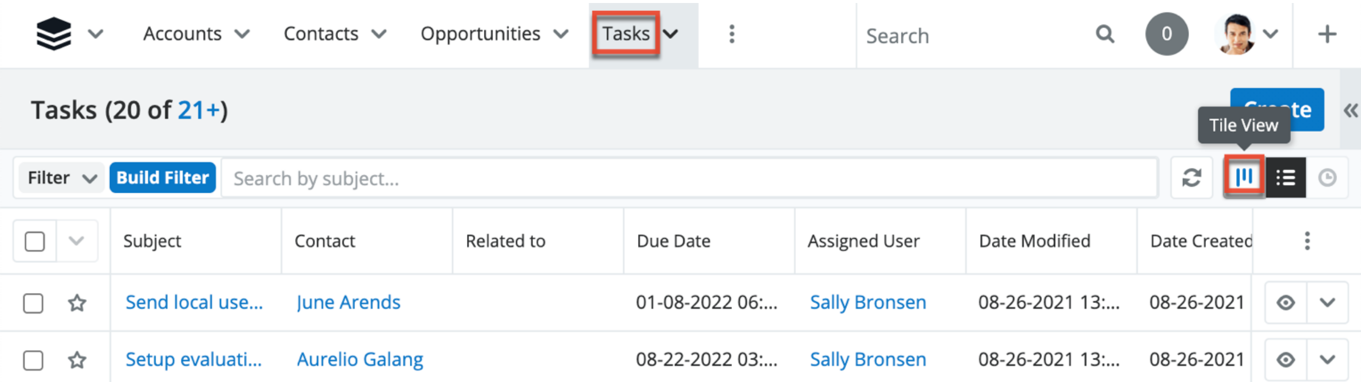


Tasks Tile View

Tile View allows users to visualize and engage with their tasks in an intuitive drag-and-drop interface. Users can drag a tile from one column to another to change its status.



To access Tile View, navigate to the Tasks list view and click on the Tile View icon next to the search bar:



For more information on using the Tile View, refer to the User Interface documentation. For information on configuring Tile View layouts, refer to the Tile View Settings documentation in the Administration Guide.

Closing Tasks

Once a task has been completed, users can edit the Status field to "Completed" while on the record or list view. As a more convenient option, Sugar also allows users to close tasks, which automatically sets the status to "Completed".

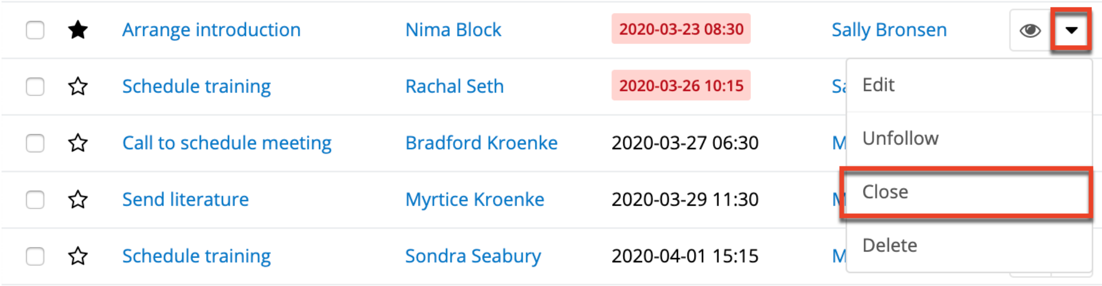
Please note that the Close option will only appear if the task is not already in a status of "Completed". The following sections explain several ways to close tasks in Sugar.

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 Module Search to find the task records you wish to close.

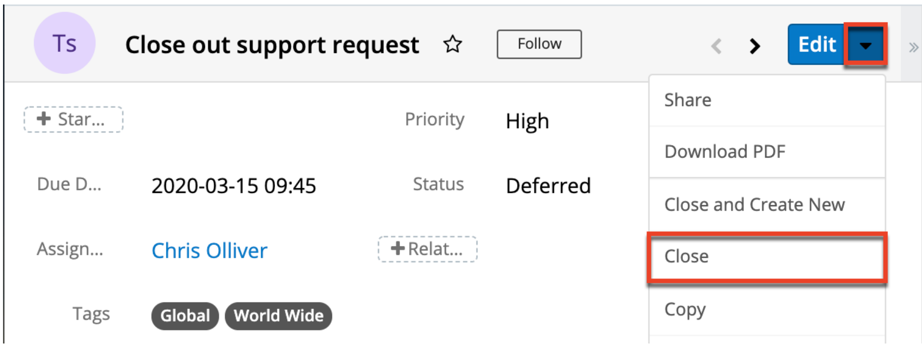
3. Click the Record Actions menu to the far right of the record's row and select "Close".



Closing via Record View

Use the following steps to close a task via the record view:

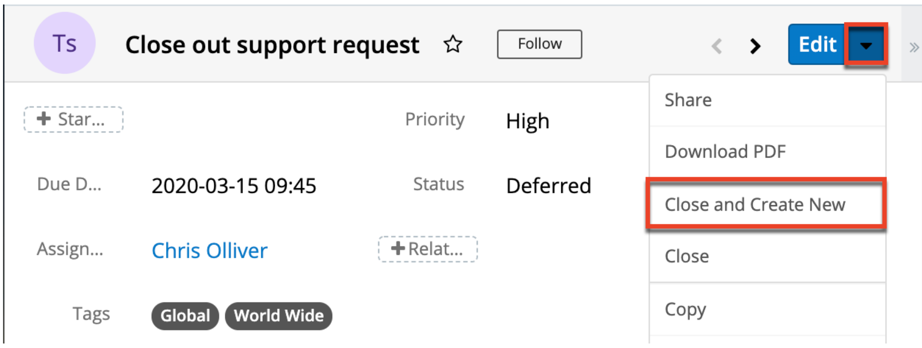
1. Navigate to a task's record view.
2. Select "Close" from the Actions menu.



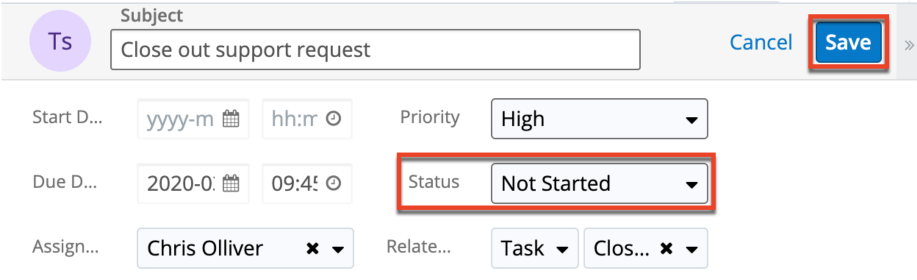
Closing and Creating New via Record View

Use the following steps to close and duplicate a task via the record view:

1. Navigate to a task's record view.
2. Select "Close and Create New" from the Actions menu.



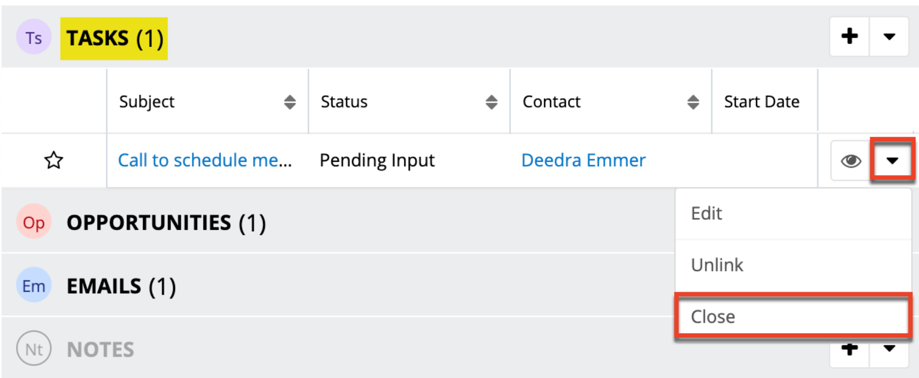
3. The displayed record view is pre-populated with the original task's values. By default, the new task's status is set to "Not Started". Update the necessary fields then click "Save".



Closing via Subpanels

Use the following steps to close a task from the Tasks subpanel on the record view of a related record:

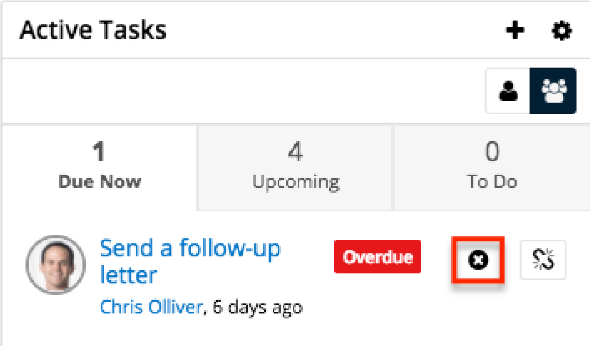
1. Scroll to the Tasks subpanel on the record view of a related record.
2. Select "Close" from the Actions menu of the task record you wish to close.



Closing via Dashlet

Tasks with statuses of "Not Started", "In Progress", or "Pending Input" appear in the Active Tasks dashlet on the record views of related records. Closing a task will cause it to move to the Inactive Tasks dashlet along with deferred tasks.

Use the following steps to close a task via the Active Tasks dashlet:

1. Navigate to the Active Tasks dashlet on your Home page or a module record view's (e.g., Accounts) intelligence pane.
2. Click the appropriate tab (Due Now, Upcoming, To Do) on the dashlet, then locate the task record you wish to close.
3. Click the X button to the right of the task's row in the dashlet.


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

Once the task is closed, the task record will be moved to the Inactive Tasks dashlet and the task's status will change to "Completed".

Working With Sugar Modules

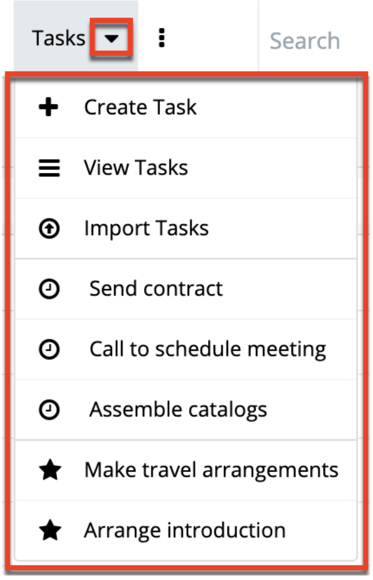
The Tasks module uses Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Task Menus

The Tasks module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with a link to more information about the menu option either in the User Interface documentation or, for Tasks-specific functionality, within this page.

Module Tab Menus

The Tasks module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Tasks" to access the list view. Once the Tasks tab displays on the navigation bar, you can click the triangle within 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.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Tasks	Opens the record 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.

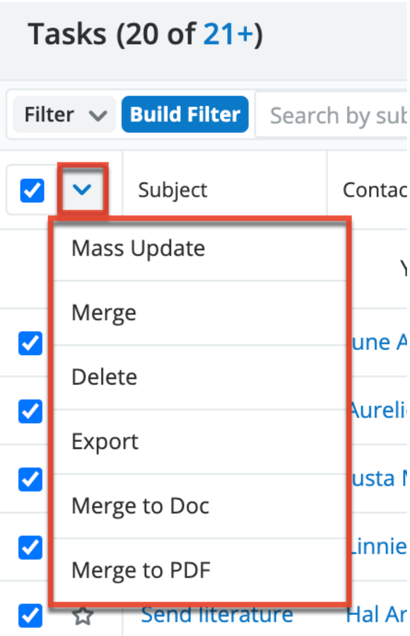
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Tasks list view displays all task records and allows for searching and filtering to locate specific tasks. You can view the basic details of each record within the field columns of the list view or click a task's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual task records or click the checkbox in the list header to select all records displayed on the current set of list view results.



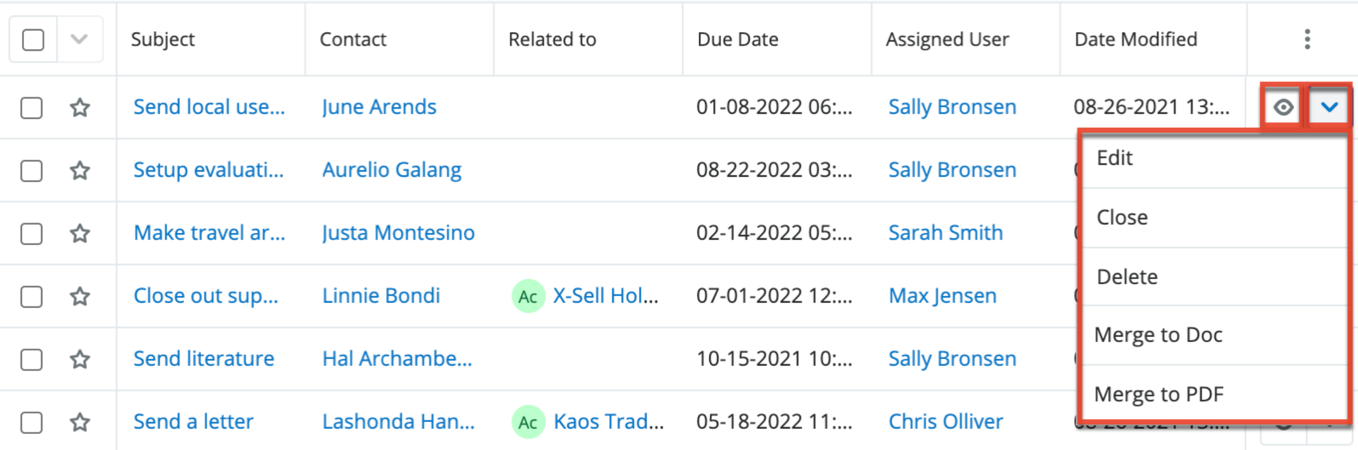
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more tasks at a time.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Merge	Merge one or more duplicate tasks.
Delete	Delete one or more tasks at a time.
Export	Export one or more tasks to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the

	Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual task directly from the list view.

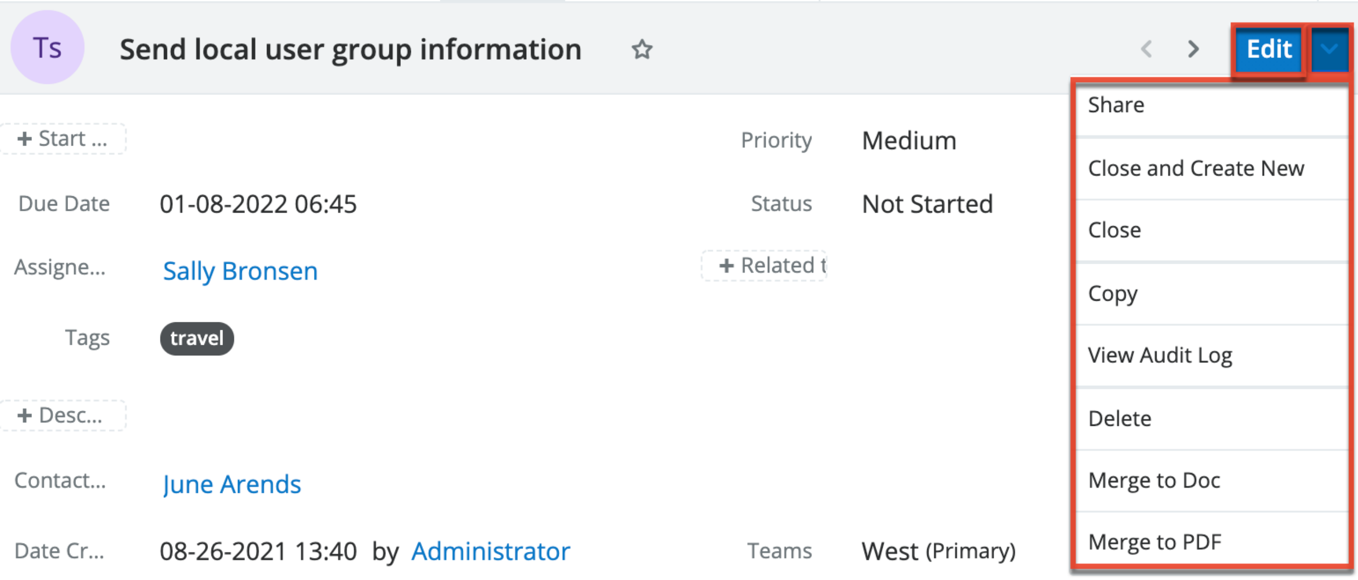


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this task in the intelligence pane.
Edit	Edit this task.
Follow	(Available if Activity Streams are enabled)Follow changes to this task in your activity stream.
Close	Close this task.
Delete	Delete this task.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Tasks record view displays a single task in full detail including its fields, subpanels of related records, and activity stream. To access a task's record view, simply click a hyperlinked task name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this task.
Share	Share a link to this task via email. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Download PDF	Download the record's information as a PDF file. • This menu option is only visible if the administrator has created a PDF template for the Tasks module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.

Email PDF	Email the record's information as a PDF attachment. • This menu option is only visible if the administrator has created a PDF template for the Tasks module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Close and Create New	Close this task as "Completed" and duplicate it 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".
Copy	Duplicate this task to create a new task.
View Audit Log	View a record of changes to this task.
Delete	Delete this task.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules.

Content Link	Description
Creating Tasks Basic Task Creation Creating via Quick CreateCreating via Subpanels Creating via Duplication Importing Tasks	The Creating Records section covers the various methods of creating new task records, including via the Create button in the Tasks module, the Quick Create menu on the upper right of every Sugar page, via the Tasks subpanel on related modules, duplication of an existing task record, and importing a list of tasks into Sugar using a .csv spreadsheet.
Viewing Tasks Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Dashlets Viewing via Activity StreamsViewing via Preview Viewing via Reports	The Viewing Records section describes the various methods of viewing task records, including via the Tasks list view and record view, the Recently Viewed menu in the Tasks module tab, list view dashlets showing task information, activity stream entries concerning task updates or where a user mentions a task, previewing tasks in the right-hand side panel, and reports displaying task data. **Note**: There are also specialized dashlets for tasks, which are explained in detail in the Task Dashlets section of this page.
Searching for Tasks Global Search List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to the two searching methods for locating tasks: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Tasks module.
Tasks List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing	The List View section walks through the many elements of the Tasks List View layout which contains a filterable list of all task records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Tasks list view's menus are available in the List View Mass Actions Menu and

Column Sorting Column Selection Preview Record Actions Menu More Tasks Activity Stream Dashboards	List View Record Actions Menu sections of this page.
Tasks Record View Favorite Designation Following Designation Next or Previous Record Actions Menu Show More Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Activity Stream Dashboards	The Record View section walks through the many elements of the Tasks Record View layout which contains detailed information about a single task record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Tasks record view's menu is available in the Record View Actions Menu section of this page.
Editing Tasks Editing Inline via Record View Editing via Record View Editing Inline via Subpanels Editing Inline via List View Mass Editing via List View	The Editing Records section describes the various methods of editing existing task records, including inline via the tasks record view, in full edit mode on the record view, inline via the Tasks subpanel on related module records, inline via the Tasks list view, and via the Mass Update option on the list view.
Deleting Tasks Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted tasks, including via the Tasks record view, an individual record's Actions menu on the Tasks list view, and the Mass Actions menu on the list view.
Exporting Tasks	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of tasks and all their data as a .csv file for use outside of Sugar (e.g., in Microsoft Excel).
Recalculating Calculated Values	The Recalculating Calculated Values section provides instructions on utilizing the Recalculate Values list view option to update calculated field values in the module if the administrator has changed

	the field's formula via Admin > Studio.
Merging Tasks Merging via List View	The Merging Records section provides instructions for merging duplicate tasks which will combine field values and related records into a single task.
Viewing Task Audit Logs	The Viewing Record Audit Logs section describes the View Audit Log record view option which displays a history of changes to the task's audited fields.
Task PDFs Downloading Task PDFs Emailing Task PDFs	The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of task information as configured by an administrator via Admin > PDF Manager.
Favoriting Tasks Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking tasks as favorites, including via the Tasks list view, Tasks record view, or any Tasks subpanel appearing on the record view of a related module. Favoriting a task allows you to easily access it from list views, dashlets, or the Tasks module tab.
Following Tasks Following via List View Following via Record View	The Following Records section describes the various methods of marking tasks as "Following", including via the Tasks list view and record view. Following a task causes its activity stream updates to be included on your Home page and Tasks list view activity streams so that you can easily keep up with changes and user posts on the record.
Sharing Tasks	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the task record. If the recipient is logged into Sugar, clicking the link will bring them directly to the task's record view.

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Notes

Overview

Sugar's Notes module consists of individual notes which contain text or attached files pertinent to the related record. The Related To flex-relate field is typically set to the module and record to which the note's contents are relevant. A contact record can also be related using the Contact field which will cause the note to be displayed when viewing the contact record. This documentation will cover information and actions specific to the Notes module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting notes, please refer to the Working With Sugar Modules section of this page.

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 documentation in the Administration Guide.

Note Fields

The Notes module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role 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.
Attachments	One or more files attached to the note. **Note**: The Sugar administrator can specify the maximum file size allowed to be uploaded.

Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
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?	Notes related to cases, bugs, and/or knowledge base articles will display in the portal by default. **Note**: Administrators can have this field disabled by default via Admin > Studio.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
Is Attachment	A system-level checkbox that indicates if the note represents a file attachment to another record. Files attached to records are stored in Sugar as notes, so this field can be used to differentiate between an individual note or an attachment note. It is set to "true" on notes that are attachments to emails, knowledge base articles, or other notes. This field is not available in Studio or the user interface and is only available in SugarBPM and reports.
Note	The details and content of the note.
Note Source	A system-level dropdown field that represents the origin of newly created notes. It is set to External on notes created via Portal and set to Internal on notes created in Sugar. This field is not available in Studio or the user interface and is only available in SugarBPM.

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.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the note record.

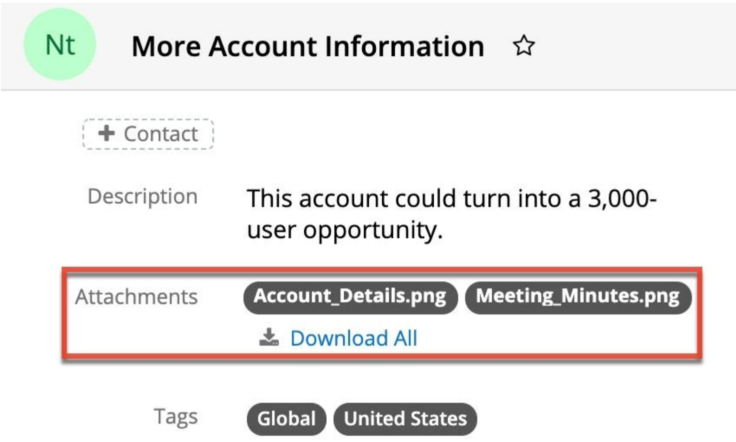
Note Attachments

You can attach one or more files to a note using the Attachments field. Click "Browse" to choose a file to upload from your computer or hold the Ctrl or Shift key on your keyboard to select multiple files to upload. Once you have uploaded your file(s), be sure to wait for the file name(s) to appear in the Attachments field before saving the record to ensure that the file has been fully uploaded.

When you create a note that has attached files, each attachment is each saved as an individual note. As a result, creating a note with two attachments, for example, creates three note records: the original note plus an additional note for each attachment file.

Note: Only parent note records, and not the attachment-only note records, are displayed in the Notes list view.

If there is only one image file attached to a note, a preview of the image is displayed in record view and in the preview. You can open files by clicking them or use the Download or Download All button to save them to your computer in a zip file.



When copying note records, file attachments are not carried over. To keep the file attachments in the copied note, save them to your computer and then upload them to the newly created note.

Working With Sugar Modules

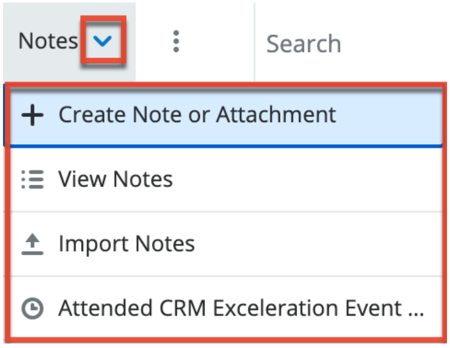
While the Notes module has some features that only apply to notes, it also uses the Sidecar user interface that most Sugar modules are based on. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Note Menus

The Notes module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation.

Module Tab Menus

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 click the triangle in the Notes 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 most recently viewed. The Favorites menu displays the list of notes you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Note or Attachment	Opens the record 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.

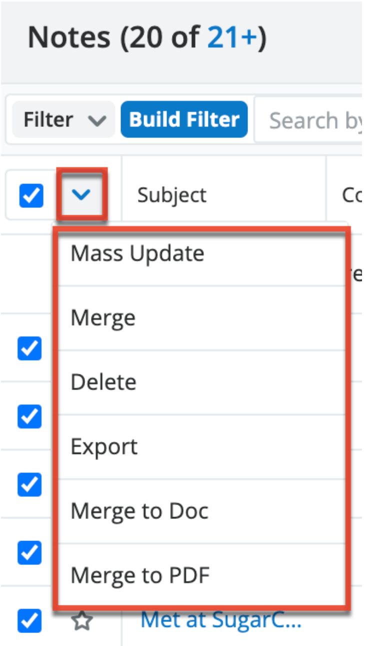
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Notes list view displays parent note records, and not attachment-only note records, and allows for searching and filtering to locate specific notes. You can view the basic details of each record within the field columns of the list view or click a note's subject to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual note records or click the checkbox in the list header to select all records displayed on the current set of list view results.



The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more notes at a time.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Merge	Merge two or more duplicate notes.
Delete	Delete one or more notes at a time.
Export	Export one or more notes to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

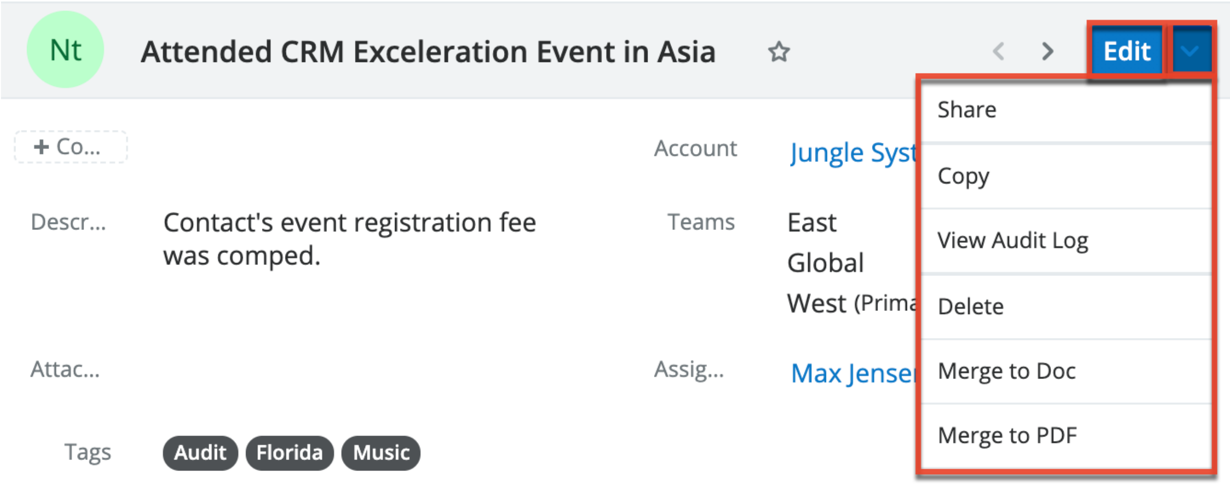
The Record Actions menu to the far right of each record's row allows you to perform actions on the individual note directly from the list view.

The list view's Record Actions menu allows you to perform the following operations:

Menu Item	**Description**
Preview (Eye icon)	Preview this note in the intelligence pane.
Edit	Edit this note.
Follow	(Available if Activity Streams are enabled) Follow changes to this note in your activity stream.
Delete	Delete this note.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Notes record view displays a single note in full detail including its fields, subpanels of related records (if applicable), and activity stream. To access a note's record view, simply click a hyperlinked note name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this note.
Share	Share a link to this note via email.
Download PDF	Download note information as a PDF file.
Email PDF	Email note information as a PDF attachment.
Copy	Duplicate this note.
View Audit Log	View a record of changes to this note.
Delete	Delete this note.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to notes.

General Instructions for Working With Sugar Modules	Notes-Specific Instructions
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Notes-specific help exists for each topic, use the links below to navigate to sections of the current page.
Creating Records	
Viewing Records	
Searching for Records	
List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	
Editing Records	
Deleting Records	
Exporting Records	
Recalculating Calculated Values	
Merging Records	
Record PDFs	
Favoriting Records	
Following Records	
Sharing Records	
Viewing Record Audit Logs	The Viewing Record Audit Logs section describes the View Audit Log record view option which displays a history of changes to the note's audited fields.

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Messages

Overview

Sugar's Messages module consists of messages, which often represent historical records of instant messaging chats that took place between two people. Every time a customer service agent or sales representative talks to a customer in SugarLive, Sugar creates a new message record containing the chat transcript. The Related To flex-relate field is typically set to the module and record to which the message's contents are relevant. Contact, lead, or user records can also be related using the Guests panel, which will cause the message to be displayed in the Messages subpanel when viewing the record.

This documentation covers information and actions specific to the Messages module. For instructions concerning views and actions that are common across most Sugar modules, such as creating, editing, and deleting messages, please refer to the Working With Sugar Modules section of this page.

Please note that you will only be able to see message records as allowed by your license type, team membership, assigned roles, and user access type. For more information, please refer to the referenced documentation in the Administration Guide.

Message Fields

The Messages module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role 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 message. Messages created by SugarLive are assigned to the user that completed the chat.
Channel Type	The type of channel used for the communication (e.g., chat).
Conversation	If the message was created by SugarLive, this field contains the transcript from the chat conversation. This field is read-only.
Conversation Link	The link to the transcript of the conversation if it is stored outside of

	Sugar.
Date Created	The date the message was created.
Date Modified	The date the message was last modified.
Description	A description of this message.
Direction	The direction of the message (e.g., Inbound).
End Date	The date and time the message ended.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
Related To	The module and record that is related to this message.
Start Date	The date and time the message started.
Status	The status of the message (e.g., Completed).
Subject	The subject or designation of the message.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the message record.

SugarLive and Messages

SugarLive automatically creates message records for chats that take place in SugarLive between customer service agents or sales representatives and their customers. The Conversation field is populated with the chat transcript and the Start Date and End Date fields are set to the start and end times of the chat. The message is assigned to the user and the Direction and Channel Type fields are set to "Inbound" and "Chat" respectively. While the message is in progress, its status is set to "In Progress", and once finished, the status is changed to "Completed".

The Related To flex relate field and the Guests panel are populated with the records linked to the chat session, which could be automatically selected by SugarLive or manually selected by the user. See the SugarLive page for details on linking records to messages.

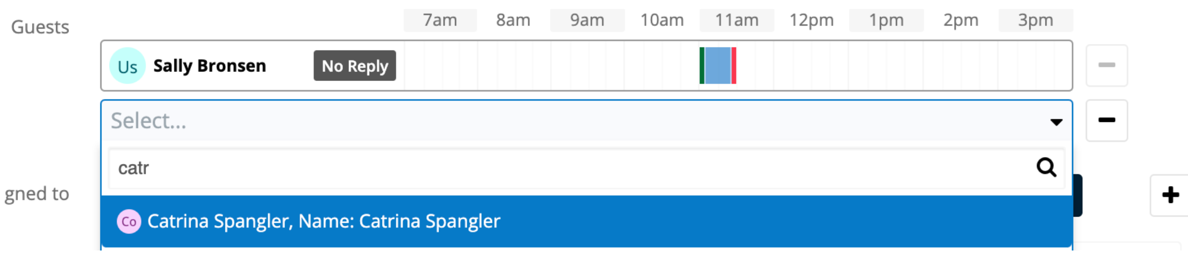
If you wish to update any of the values on the message record after you have closed the SugarLive session, you can do so by opening it in the Messages module and editing it as normal.

Message Guests

The following guests are automatically added to a message's guest list:

Automatic Guest	**To Remove the Guest**
The lead or contact in the "Related to" field, if any	This guest can be removed from the guest list at any time. If a lead or contact record is related to a message but is not on the guest list, then you will not see the message in the person's Messages subpanel.
The user who created the message	This guest can be removed from the guest list after initially saving the message. Create and save the call, click "Edit", and then click the Remove (-) button next to the created-by user's row in the Guests panel.
The user in the "Assigned to" field for the message record	The assigned user cannot be removed from the guest list. If you need to remove the assigned user from the guest list, you must first re-assign the message to a different user. Once the message record is assigned to a new user, the original user will remain a guest until removed via the Remove (-) button.
The lead or contact linked to the message during a SugarLive session	This guest can be removed from the guest list at any time. Click "Edit", and then click the Remove (-) button next to the lead or contact's row in the Guests panel.

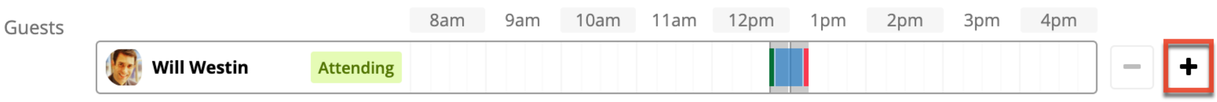
Users may add additional guests (e.g., contacts, leads, users) to messages via the Guests panel in the message's record view.



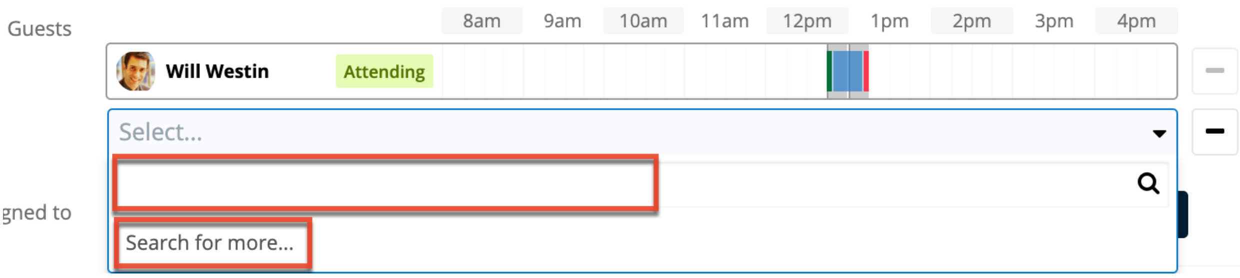
Adding via the Guests Panel

Use the following steps to add attendees via the Guests panel:

1. Navigate to the Messages module and create a new record or edit an existing record.
2. Scroll to the Guests panel and click on the Add (+) button located on the far right.



3. To add a guest, type in the name of the lead, contact, or user via the search bar that appears or select "Search for more..." to search the Contacts list view. To remove a guest, click the Remove (-) button to the right of the guest's row.
Note: The user in the "Assigned to" field on the message record cannot be removed from a message. To remove the assigned user from the guest list, re-assign the message to a different user first.

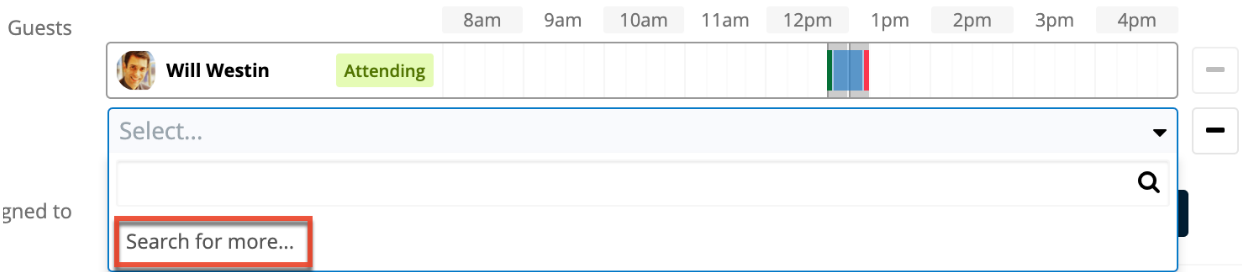


4. Click "Save"

Adding via Create a Guest

Use the following steps to create a new contact and add them as a message guest:

1. Navigate to the Messages module and create a new record or edit an existing record.
2. Scroll to the Guests panel, click on the Add (+) button, and then click on "Search for more..." to expand the Contacts list view.



3. At the top of the list view, click the Create button and fill out the appropriate fields to create a new contact. Once completed, save the new contact record and Sugar will automatically add the contact to the guest list for the message.
4. Confirm the remaining fields and guests are configured appropriately and then save the message.

Working With Sugar Modules

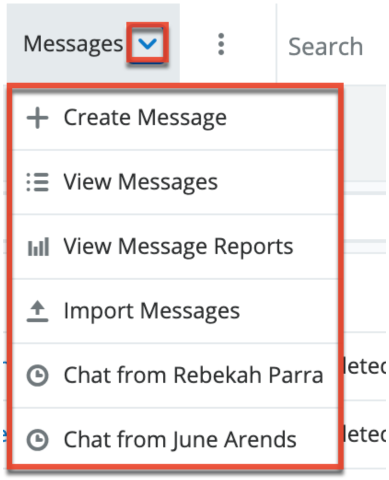
While the Messages module has some features that only apply to messages it also uses the Sidecar user interface that most Sugar modules are based on. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Message Menus

The Messages module contains various options and functionality that are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation.

Module Tab Menus

The Messages module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Messages" to access the list view. Once the Messages tab displays on the navigation bar, you can click the triangle within 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 messages you most recently viewed. The Favorites menu displays the list of messages you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Message	Opens the record view layout to create a new message.
View Messages	Opens the list view layout to search and display messages.
View Message Reports	Opens the Reports list view filtered to reports that target the Messages module.
Import Messages	Opens the import wizard to create or update messages using external data.

For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

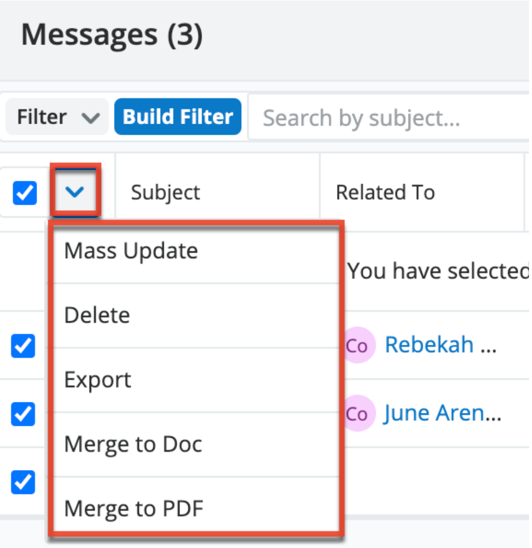
List View Menus

The Messages list view displays all message records and allows for searching and filtering to locate specific messages. You can view the basic details of each record within the field columns of the list view or click a message's subject to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use

the checkbox on each record's row to select individual message records or click the checkbox in the list header to select all records displayed in the current set of list view results.

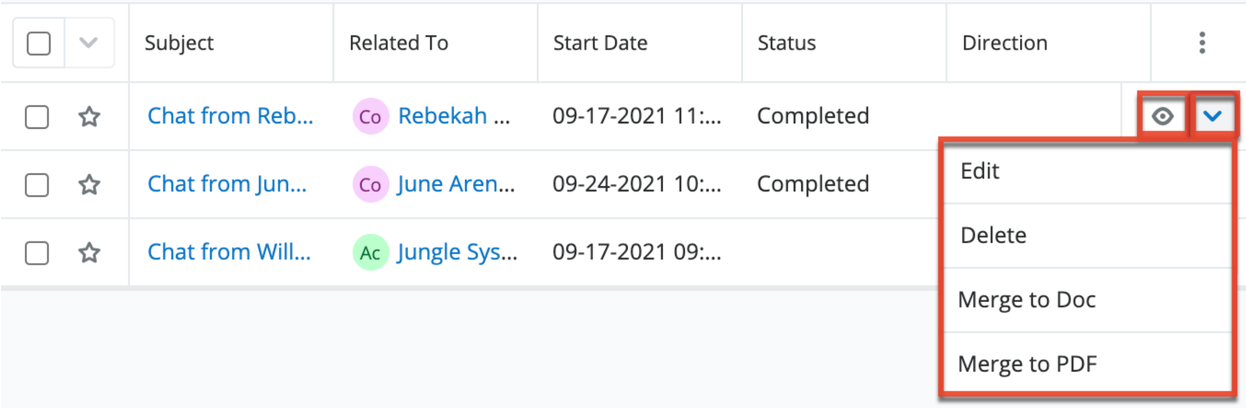


The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more messages at a time.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Delete	Delete one or more messages at a time.
Export	Export one or more messages to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual message directly from the list view.

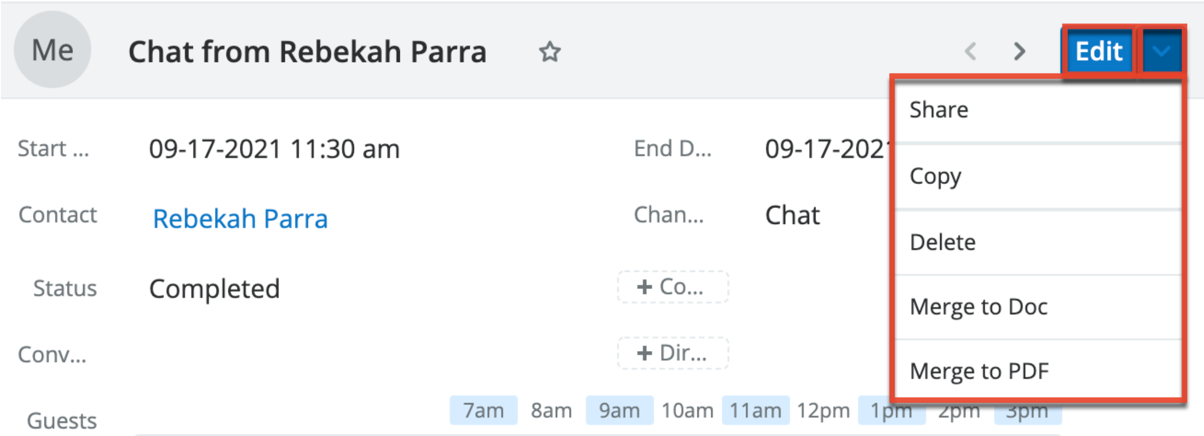


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this message in the intelligence pane.
Edit	Edit this message.
Delete	Delete this message.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Messages record view displays a single message in full detail including its fields, subpanels of related records (if applicable), and activity stream. To access a message's record view, simply click a hyperlinked message subject from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this message.
Share	Share a link to this message via email.
Copy	Duplicate this message.
Delete	Delete this message.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to messages.

General Instructions for Working With Sugar Modules	Messages-Specific Instructions
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Messages-specific help exists for each topic, use the links below to navigate to sections of the current page.

Creating Records	SugarLive and Messages
Viewing Records	
Searching for Records	
List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	
Editing Records	
Deleting Records	
Exporting Records	
Favoriting Records	
Sharing Records	

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Opportunities

Overview

Sugar's Opportunities module allows you to track individual sales and their line items from start to finish. Each opportunity record serves as a header for a group of revenue line items as well as relating to other important records such as quotes, contacts, etc. Each revenue line item is the prospective sale of a particular product and includes relevant sale data. Each revenue line item will typically progress through several Sales Stages until it is marked either "Closed Won" or "Closed Lost". The Opportunity record reflects the amount and expected close date of its revenue line items. Opportunities and revenue line items can be leveraged even further by using Sugar's Forecasts 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.

Note: If your instance is configured to use opportunities alone without revenue line items, please refer to the Opportunities documentation in the Sugar Professional Application Guide. For more information about changing your opportunities model via Admin > Opportunities, please see the Opportunities

Configuration documentation in the Administration Guide.

You can view opportunity information in opportunity-based dashlets such as "My Closed Opportunities". Clicking an opportunity's name or bubble from any dashlet will open the Opportunities record view while hovering on the bubble will display key details in a tooltip. For more information on using dashlets and viewing opportunity records via dashlets, please refer to the Dashboards and Dashlets documentation.

This documentation will cover information and actions specific to the Opportunities module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting calls, please refer to the Working With Sugar Modules section of this page.

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.

Note: The Opportunities module is not available for Sugar Serve users. For more information on license types and the functionality available for each type, refer to the User Management documentation.

Opportunity Fields

The Opportunities module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role 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.
Best	Calculated as the total of Best values of all related revenue line items, the opportunity's most optimistic total

	amount. The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Opportunities section of this page. **Note:** The Best value for related revenue line items in a sales stage of "Closed Lost" will not be included in the calculation.
Campaign	The campaign, if any, from which the opportunity originated. **Note**: This is an optional field as not all opportunities will have a campaign.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
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.
Escalated	Displayed as a red badge with the text "Escalated" beside the record name in the header and at the top of the preview, this field indicates if the record has an open escalation related to it. If the record is not escalated, the badge is not visible. This field can also be added to other views. See the Escalations page for more details on escalating records.

Expected Close Date[1]	Calculated as the last expected close date of all open related revenue line items. It will not include closed records in the calculation until all related revenue line items are either "Closed Won" or "Closed Lost".
Forecast[1]	The opportunity's commit range for forecasting (e.g., "Include", "Exclude", etc.). **Note**: The available values are determined by the Ranges configuration in Admin > Forecasts. For more information on configuring forecasting ranges, please refer to the Forecasts documentation in the Administration Guide.
Forecasted Likely	Calculated as the total of Likely values for revenue line items that have a forecast value within the included range.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
Lead Source	The source (e.g., Trade Show) from which the opportunity originated.
Likely	Calculated as the total of Likely values of all related revenue line items, the opportunity's most probable total amount. The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Opportunities section of this page. **Note:** The Likely value for related revenue line items in a sales stage of

	"Closed Lost" will not be included in the calculation.
Next Step	The succeeding stage of the opportunity's sales cycle.
Opportunity Name	The name of the opportunity.
Predictions	Displayed as a column in the Opportunities list view for Sugar Sell instances with SugarPredict enabled, this field shows the opportunity win likelihood scores for each record.
Renewal Badge (unlabeled)	For opportunities with open and renewable revenue line items, a badge will appear next to the opportunity's name with the date that the next renewal term begins. 
Sales Stage[1]	The opportunity's current sales stage (e.g., Prospecting, Qualification, etc.), calculated based on the open related revenue line items. It will not include closed records in the calculation until all related revenue line items are either "Closed Won" or "Closed Lost".
Service Duration[1]	Calculated as the longest service duration of all open related service revenue line items. It will not include closed records in the calculation until all related revenue line items are either "Closed Won" or "Closed Lost".
Service Start Date[1]	Calculated as the earliest service start date of all open related revenue line items, available only when marked as a "Service". It will not include closed records in the calculation until all related revenue line items are either "Closed Won" or "Closed Lost".
Set Across Revenue Line Items[1]	Available in create mode, enabling the control and cascading of values to open revenue line items.
Status	Calculated based on the sales stages of the related revenue line items, the

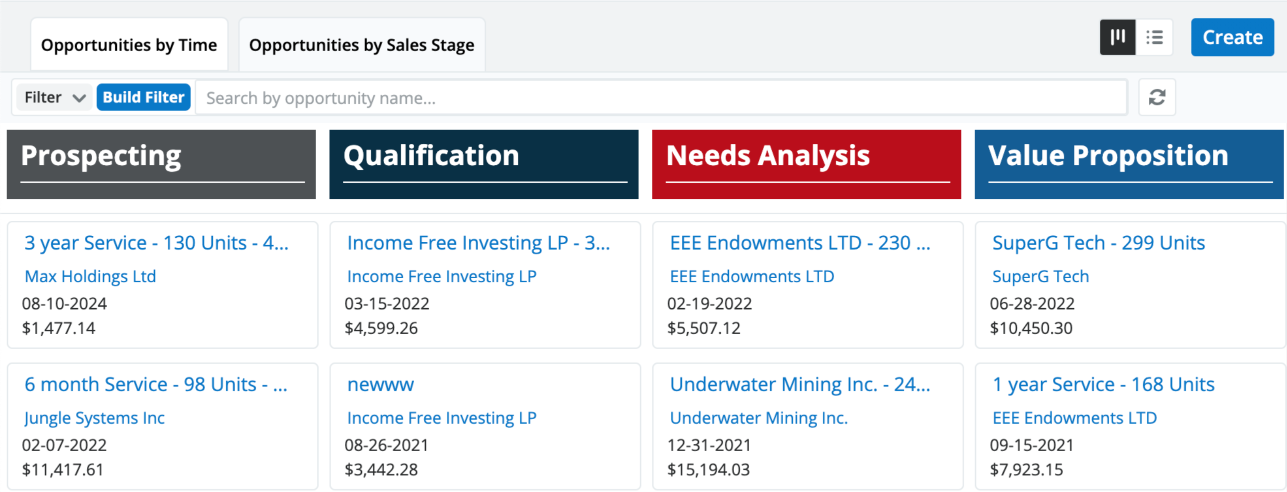
	current status of the opportunity (e.g., New, In Progress, etc.).
Teams	The Sugar team(s) assigned to the opportunity record.
Type	The type (e.g., new business, existing business) of opportunity.
Update Open Revenue Line Items[1]	Available in edit mode, enabling the control and cascading of values to open revenue line items.
Worst	Calculated as the total of Worst values of all related revenue line items, the opportunity's least optimistic total amount. The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Opportunities section of this page. **Note**: The Worst value for related revenue line items in a sales stage of "Closed Lost" will not be included in the calculation.

[1] For more information on these fields, please review the Cascading Values on Opportunity section of this page.

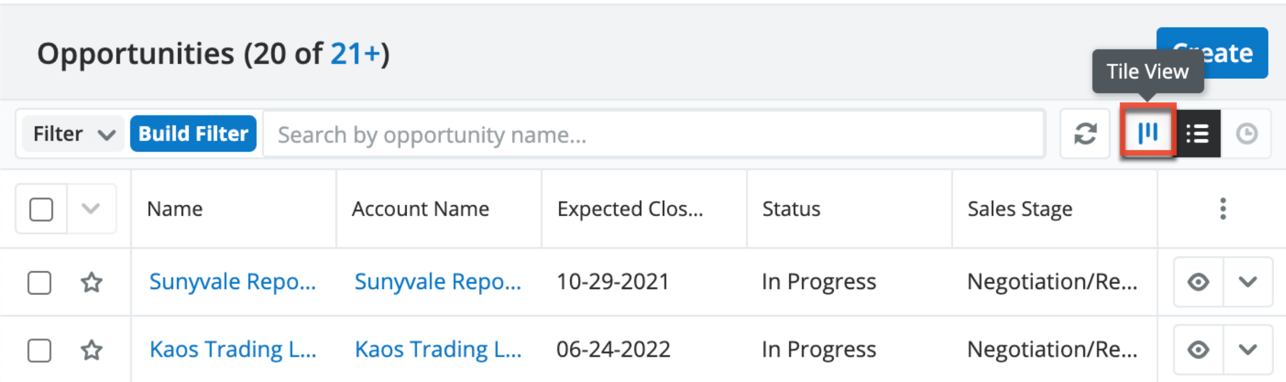
Note: If your Sugar instance is configured to use Opportunities with Revenue Line Items, it is possible to automatically generate purchases and purchased line items records from your "Closed Won" opportunities and revenue line items. For more information, refer to the Purchases, Purchased Line Items, and Opportunities section of this guide.

Opportunities Tile View

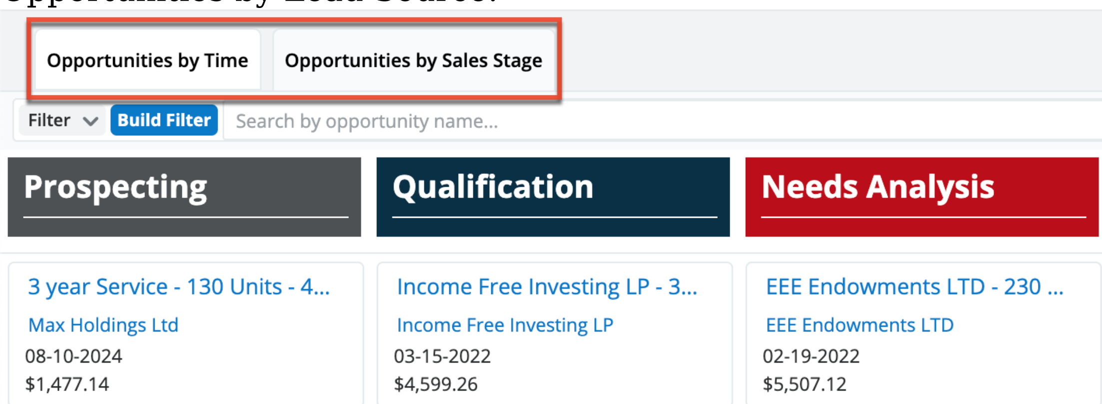
Tile View allows users to visualize and engage with their opportunities in an intuitive drag-and-drop interface. Users can drag a tile from one column to another to change its status or change the expected close date from one month to the next.



To access Tile View, navigate to the Opportunities list view and click on the Tile View icon next to the search bar:



When using Tile View for the Opportunities module, you can toggle between two group-by options: Opportunities by Time and the group-by option configured by your administrator. By default, the second grouping is Opportunities by Sales Stage, but your admin may have configured a different grouping such as Opportunities by Lead Source:



For more information on using the Tile View, refer to the User Interface documentation. For information on configuring Tile View layouts and groupings, refer to the Tile View Settings documentation in the Administration Guide.

Tile View With Revenue Line Items

Instances that leverage the Revenue Line Items module will enjoy added benefits when using Tile View. Instead of updating the sales stage and expected close dates in each revenue line item in an opportunity one-by-one, users can update all of an opportunity's revenue line items at once; Dragging an opportunity from one column to another will update all of the opportunity's open revenue line items in one quick action.

When interacting with Opportunities Tile View in an instance using revenue line items, keep in mind the following rules:

- When an opportunity has more than one revenue line item and those line items have different sales stages, the opportunity will show up in the column associated with the latest (right-most) sequential sales stage that is not Closed Won or Closed Lost.
- Opportunities with all line items in the Closed Lost stage will appear in the Closed Lost column.
- Opportunities with all line items in either closed stage and at least one of them are Closed Won will appear in the Closed Won column.
- Moving an opportunity from one sales stage to another in Tile View will update all open revenue line items in the opportunity to the new sales stage.
- Moving an opportunity from one month to another in Tile View will update the expected close dates for all of its open revenue line items to the last day of the month that it is moved to.

SugarPredict

Sugar Sell has the ability to incorporate the artificial intelligence (A.I.) capabilities of SugarPredict to give you profound insight into your lead and opportunity data, ultimately enabling you to convert leads and close opportunities faster and more consistently.

SugarPredict in Sugar Sell uses your account data along with intelligence gathered from millions of other companies and contacts to accurately predict who is most likely to become your next customer. The predictions are surfaced in Sugar via badges and scoring in dashlets and list views, making it easy for Sugar Sell users to quickly benefit from the insights at a glance.

For more information on SugarPredict dashlets and features in Sugar Sell (e.g., Opportunity Prediction), refer to the SugarPredict User Guide for Sugar Sell.

Revenue Line Items and Opportunities

When creating a new opportunity, you will be required to also create at least one revenue line item. This is because the opportunity serves as a header for a set of revenue line items, and the opportunity's amount and probability fields are roll-ups of this revenue line item data. For more information about revenue line items, please refer to the Revenue Line Items documentation.

Please note that the related revenue line item(s) in the subpanel determine the value for certain Opportunity fields (e.g., Status, Expected Close Date, Likely, etc.). The opportunity's Status field will be "New" until a revenue line item is added. It will then remain "In Progress" until all of the related revenue line items are closed. If all related revenue line items are "Closed Won", then the parent opportunity will also be marked "Closed Won". If all related revenue line items are "Closed Lost", then the opportunity will also be marked "Closed Lost". The opportunity's Expected Close Date field will automatically reflect the latest close date of its open related revenue line items. Throughout the opportunity's life cycle, the opportunity's amount fields (Likely, Best, Worst) will be automatically populated as the total of the corresponding fields on its related revenue line items.

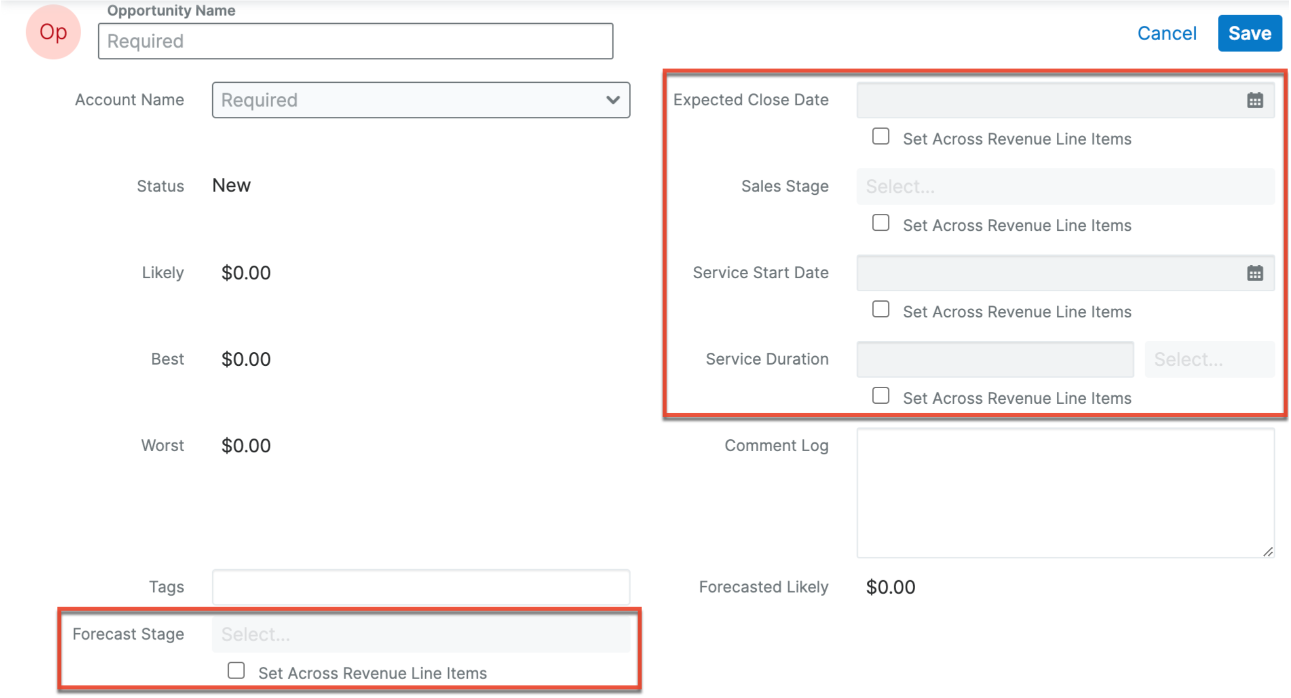
Note: The Expected Close Date, Sales Stage, and Service Start Date fields will not include values from closed revenue line items until all are either "Closed Won" or "Closed Lost".

Cascading Values on Opportunity

Five fields on the opportunity record have the ability to push values to the related revenue line item records' corresponding fields: Forecast Stage, Expected Close Date, Sales Stage, Service Start Date, and Service Duration. Below each of these fields is a checkbox field labeled "Set Across Revenue Line Items" when creating a new opportunity or "Update Open Revenue Line Items" when editing an existing opportunity.

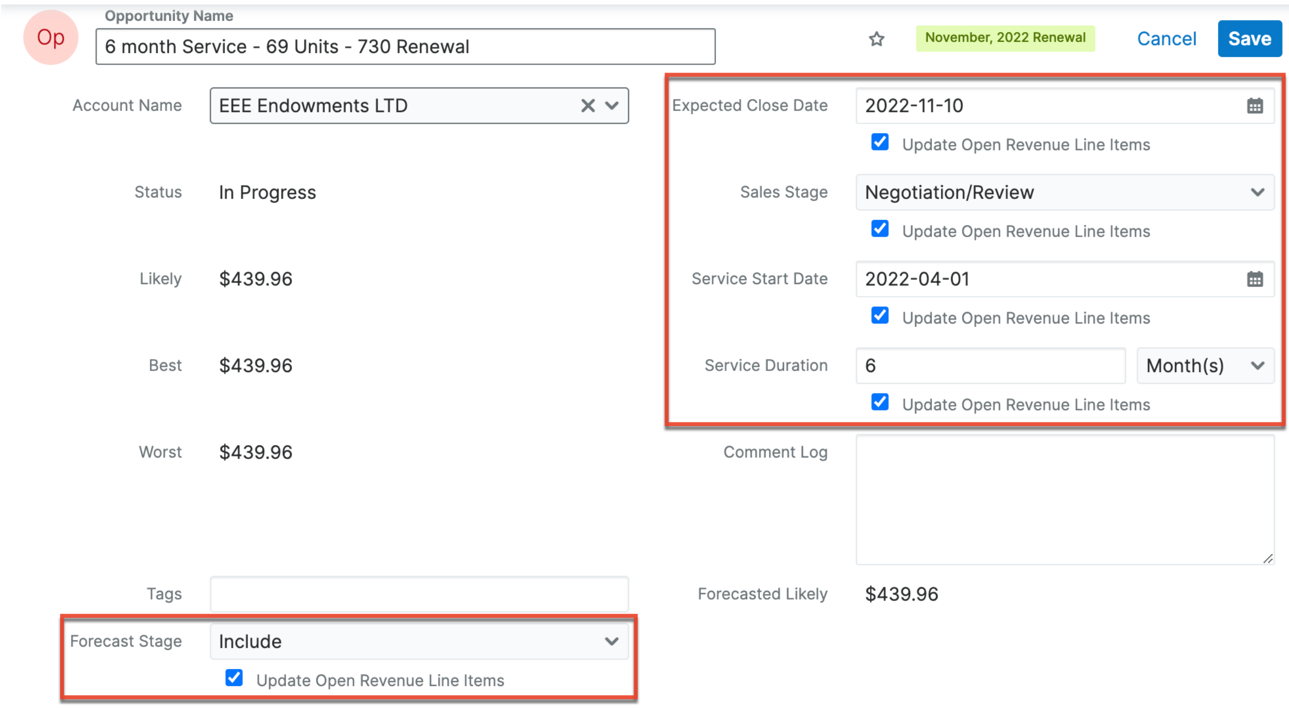
New Opportunity Records

When creating a new opportunity record, if a Set Across Revenue Line Items checkbox field is enabled, the corresponding field in the eligible revenue line items will adopt the value set on the opportunity. Because you are setting the values from the opportunity, the revenue line item fields will be disabled. In order to change the fields at the revenue line item level, the Set Across Revenue Line Items checkbox must be disabled. In this case, the opportunity field is calculated from the revenue line items according to the criteria outlined in the [cascading rules] section. You can enable the checkboxes for the Service Start Date and Service Duration fields prior to entering revenue line items. If no eligible service line items exist when you save the record, you will receive a notification. After clicking "Confirm" the values will be cleared out of those two opportunity fields.



Existing Opportunity Records

When editing an existing opportunity, if an Update Open Revenue Line Items checkbox field is enabled, the corresponding field in the open and eligible revenue line items will adopt the values set on the opportunity. If the Update Open Revenue Line Items checkbox fields are disabled, you can set the fields individually on the revenue line items and the opportunity fields are calculated according to the criteria outlined in the [cascading rules] section. Please note that the ability to cascade values from the opportunity to revenue line items is also available when editing the record via the opportunities list view, subpanel, preview view, and record view as well as during lead conversion.



Cascading Rules

The following table explains what behavior to expect when viewing or editing the opportunity cascade fields, which values will cascade up to the opportunity, and under what circumstances. For example, the first row of the table is interpreted as: When viewing the opportunity's Expected Close Date field, if all revenue line items are closed and at least one is "Closed Won", then the field will be read-only and the field's value will be set as the latest date of the "Closed Won" revenue line item(s).

Opportunity Field	IF...	THEN...	
	Revenue Line Item Criteria	**Opportunity Field State**	**Opportunity Field Calculated Value**
Expected Close Date	All revenue line items are closed and at least one is "Closed Won"	Read-only	The latest date of the "Closed Won" revenue line item(s)
	All revenue line items are "Closed Lost"		The latest date of the "Closed Lost" revenue line item(s)
	At least one revenue line item is open	Editable	The latest date of the open revenue line item(s)

Forecast Stage	At least one revenue line item is "Closed Won"	Read-only	The forecast value of the "Closed Won" revenue line item(s)
	At least one revenue line item is "Closed Lost" while all others are open		The forecast value of the "Closed Lost" revenue line item(s)
	All revenue line items are open	Editable	"Include" if any revenue line items have "Include" as their forecast value; otherwise "Exclude".
Sales Stage	All revenue line items are closed and at least one is "Closed Won"	Read-only	"Closed Won"
	All revenue line items are closed and at least one is "Closed Lost"		"Closed Lost"
	At least one revenue line item is open	Editable	The most advanced sales stage of the open revenue line item(s)
Service Start Date	No service revenue line items exist	Read-only	Blank
	All service revenue line items are closed and at least one is "Closed Won"		Earliest date of the "Closed Won" service revenue line item(s)
	All service revenue line items are closed and at least one is "Closed Lost"		Earliest date of the "Closed Lost" service revenue line item(s)
	At least one service revenue line item is open	Editable	Earliest date of the open service revenue line item(s)
Service Duration	No service revenue	Read-only	Blank

	line items exist		
	All service line items are closed and at least one is "Closed Won"		Maximum duration of the "Closed Won" service line item(s)
	All service revenue line items are "Closed Lost"		Maximum duration of the "Closed Lost" service revenue line item(s)
	At least one service revenue line item is open but without a flexible duration[1]		Maximum duration of the open and "Closed Won" service revenue line items
	At least one service revenue line item is open with a flexible duration	Editable	Maximum duration of the open, flexible duration service revenue line item(s)

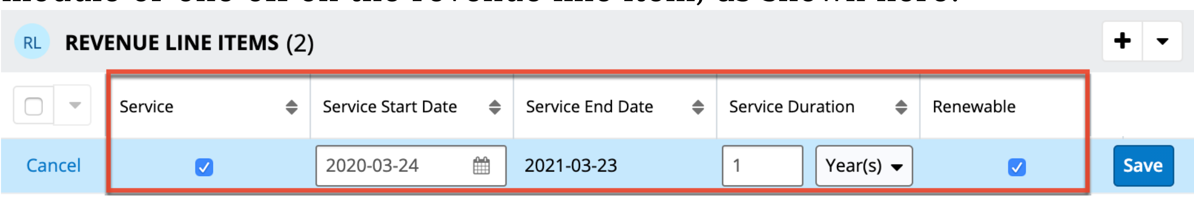
[1] A revenue line item's Duration field may be uneditable if its related product catalog record has the Lock Duration field enabled or it is a coterminous add-on.

Services and Renewable Revenue Line Items

Opportunities can have line items that represent services or subscriptions that may be sold with a defined start and end date and that may be renewed on a regular basis. When these fields are used in Sugar Sell, the renewable services will get automatically added to the future pipeline as they are sold and can be tracked via the Renewals Console.

Note: You must use Sugar Sell with revenue line items enabled to take advantage of pipeline renewal automation functionality.

To designate a revenue line item as a service, simply place a checkmark in the Service field. This can be configured for product records in the Product Catalog module or one-off on the revenue line item, as shown here:



If no product catalog record is selected, and the revenue line item is marked as a service, the Service Duration, Service Start Date, and Renewable fields will become editable. If a product is selected from the Product Catalog, the Service and Service Duration field values will automatically populate from the related product record. Additionally, if the Lock Duration field is checked on the related product catalog record, the Service Duration field cannot be modified on the revenue line item record. The Service End Date will automatically calculate based on the values in the Service Duration and Service Start Date fields. For more information on creating and managing records in the Product Catalog, please refer to the Product Catalog documentation in the Application Guide.

As mentioned above, once a product or line item is set as a "Service", the "Renewable" field becomes an additional option. For Sugar Sell, placing a checkmark in the Renewable field will tell Sugar to enable pipeline automation for the parent opportunity. With pipeline automation, Sugar Sell will automatically create a new opportunity for you when the parent opportunity changes to the Closed Won status. Keep in mind that a new opportunity will only be created when the opportunity contains a revenue line item that meets the following criteria:

- Service = Yes
- Renewable = Yes
- Sales Stage = Closed Won

Note: To be identified as "renewable" by Sugar Sell's pipeline automation engine, the user who closes an opportunity with renewable line items must be a Sugar Sell user or else the pipeline automation will not initiate.

On the new opportunity, the Expected Close Date, Service Start Date, Service Duration, and Service End Date will roll over to succeed the dates from the originating revenue line item. For example, when an opportunity is won for one year of renewable service that starts on January 1, 2020, a new opportunity will be created by Sugar Sell to track the renewable service that will start on January 1, 2021. If the renewal revenue line item is related to a product catalog record, the Currency, List Price, Cost Price, and Unit Price is inherited from the product catalog record, and not from the closed won revenue line item. This automation ensures that the renewal pipeline is constantly updated as you close business, saving you the time it takes to manually create opportunities for renewals. Your closed and upcoming renewals can then be tracked via Sugar Sell's Renewals Console.

Note: For Sugar Sell users, the Renewal Revenue Line Item field, representing a *:1 relationship to Revenue Line Items and not on the layout by default, will automatically populate with the renewal revenue line item record.

Coterminous Add-Ons

To further build upon the idea and functionality of automatic renewal generation, Sugar Sell supports the addition of renewable service line items to existing business (e.g., subscriptions or service contracts). When an account has an existing purchase and a future renewal opportunity, additional revenue line item records can be related to the purchased line item. When the newly created revenue line item and its parent opportunity are "Closed Won", the revenue line item on the renewal opportunity will be updated accordingly. For example, an account has already purchased five licenses of a three year, renewable service and they later decide to add five additional licenses. When a renewal opportunity and revenue line item exists already, that revenue line item will be updated to a quantity of ten and any monetary values updated accordingly. For more information and steps to complete, refer to the Coterminous Add-Ons section of the Purchases and Purchased Line Items documentation.

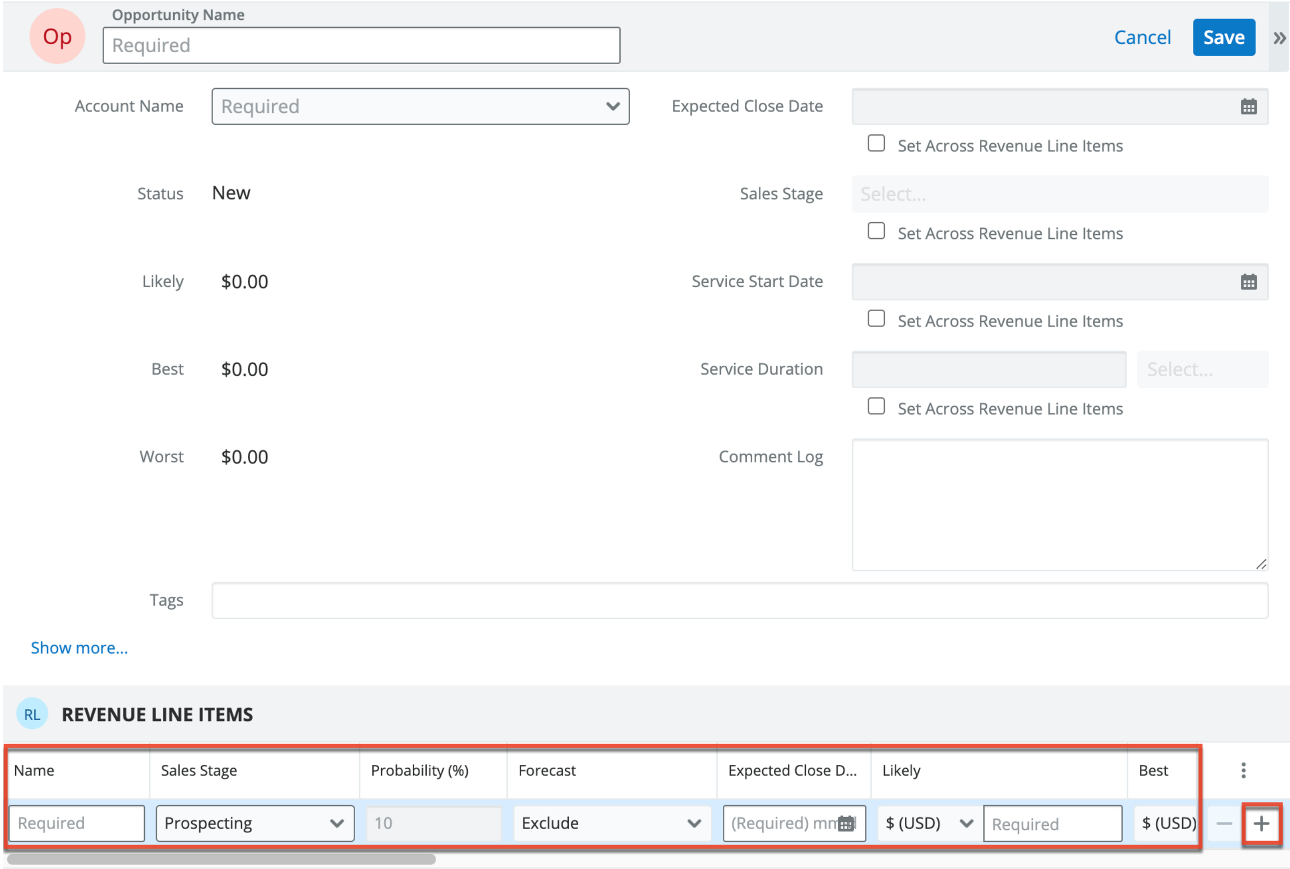
Revenue Line Items Subpanel

The Revenue Line Items subpanel contains all line items which make up this opportunity. Every opportunity must have one or more related revenue line items, and each revenue line item must belong to an opportunity. Because of this, there is no "Unlink" option in the Record Actions Menu to the right of each row. A quote can be generated from one or more of an opportunity's revenue line items from this subpanel. For more information, please refer to the Generating Quotes From Revenue Line Items section of this page.

While the Revenue Line Items subpanel appears to be a typical subpanel on existing opportunities, it behaves uniquely when creating new opportunities, as explained in the following section, Creating Opportunities With Revenue Line Items.

Creating Opportunities With Revenue Line Items

When creating an opportunity, you can create one or more revenue line items in the subpanel that appears beneath the opportunity:



The Revenue Line Items subpanel allows the following operations when creating a new opportunity:

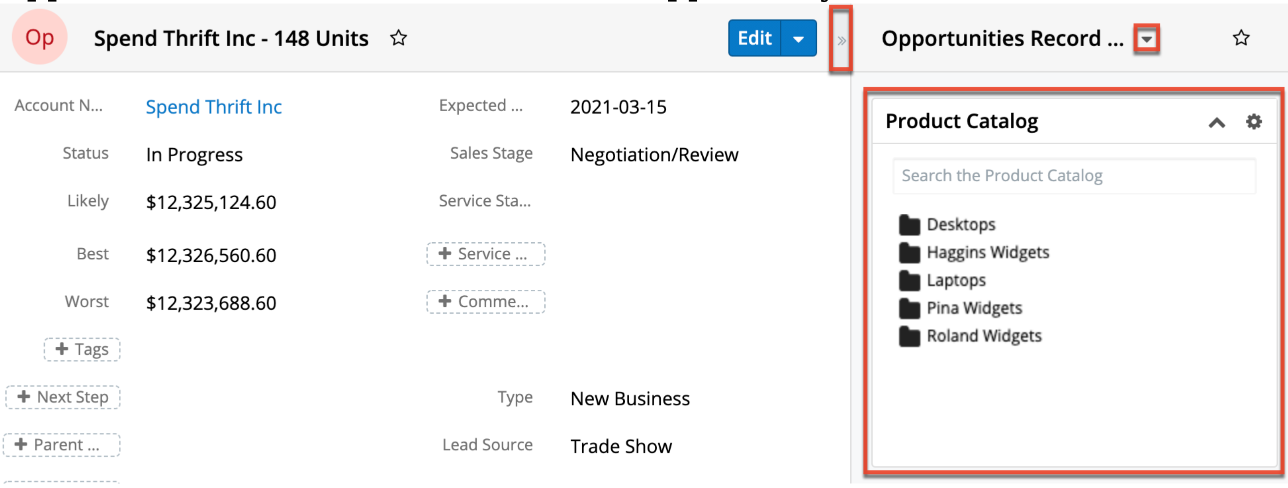
- Scroll horizontally within the subpanel to view all available revenue line item fields.
- To add additional line items to the opportunity, click the Plus button to the right of the row. The current Revenue Line Item row will be validated when adding a new row to ensure that all required fields and data are entered properly.
- To remove any revenue line items from the opportunity, simply click the Minus button to the right of the row. Please note that you cannot remove the topmost revenue line item as at least one related revenue line item is required for the opportunity to save. Instead, simply edit the row to contain the correct details.

Note: Users can add revenue line items based on a product catalog item using their preferred currency (e.g., Euro) instead of the product catalog item's currency by enabling the Create Revenue Line Items in Preferred Currency option in their user profile.

After the opportunity is saved, the revenue line item(s) will appear in the Revenue Line Items subpanel in the opportunity's record view.

Product Catalog Dashlet

The Product Catalog dashlet provides users with a simple way to access the Product Catalog directly from the opportunity record and instantly add active products from the catalog as revenue line items. The Product Catalog dashlet is located next to the opportunity when creating a new opportunity and also on the Opportunities Record Dashboard on an opportunity's record view.



The following sections explain the various features and components of the Product Catalog dashlet. For detailed steps on creating revenue line items via the Product Catalog dashlet, please refer to the Creating Revenue Line Items via Product Catalog Dashlet section of this page.

Note: The Product Catalog records must be created before users can select products when adding line items. The Product Catalog, Product Categories, Product Types, and Manufacturers modules are accessible by all users. For more information on adding and modifying products in the product catalog, please refer to the Product Catalog documentation. When you select an item from the Product Catalog dashlet, the line item's tax class, cost, and manufacturer information will be pre-filled by values set by your administrator and therefore cannot be edited.

Viewing Products and Categories via Dashlet

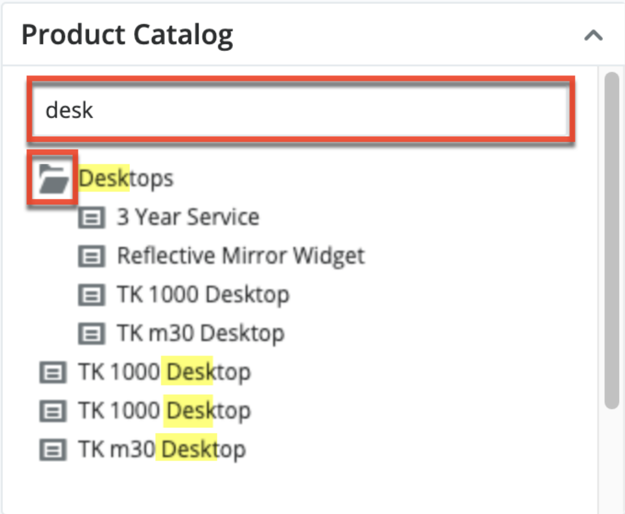
In the Product Catalog dashlet, product categories are represented as folders and are organized to reflect the structure of the customer's category hierarchy. Users can search for products and categories and click on individual folders to reveal the products contained in each category. To close an expanded category folder, click on the open-folder icon.

Note: Only products with a status of "Active" are displayed in the Product Catalog dashlet.

Simply click on a card icon or product name to instantly add the product to the opportunity. The new line item will be pre-populated with values specific to the product and can be edited for quantity, discount, or unit price prior to saving. For more information, please refer to the Creating Revenue Line Items via Product Catalog Dashlet section of this page.

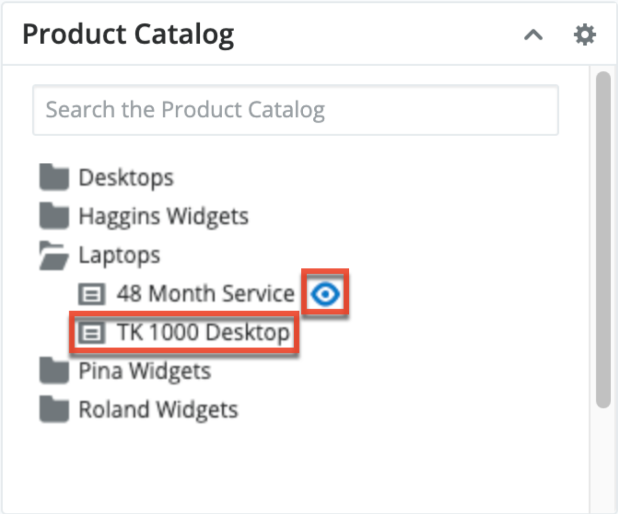
Searching for Products and Categories via Dashlet

Users can also search for products with an active status using the Search field on the Product Catalog dashlet. Upon entering a search term, a list of matching product categories and matching products will be shown in the dashlet. If the user clicks on a category (e.g., a folder) in the list of search results, all products in the category are loaded, not only the products that match the search terms.



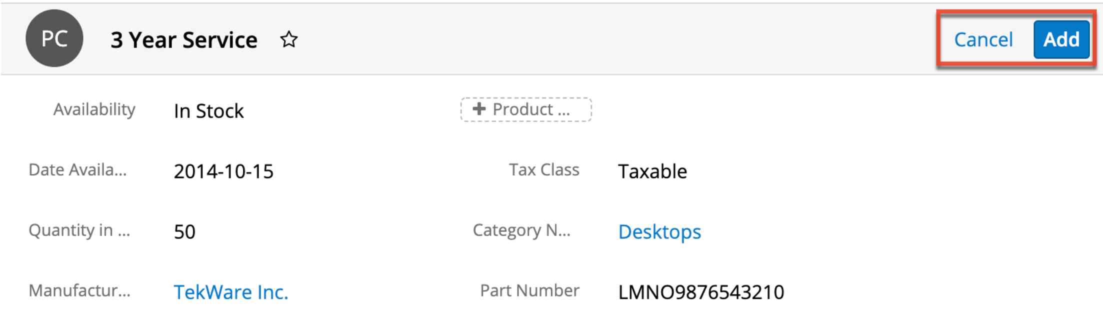
Previewing Products via Dashlet

Click on the Preview icon to the right of a product name to view the complete details of its Product Catalog record:



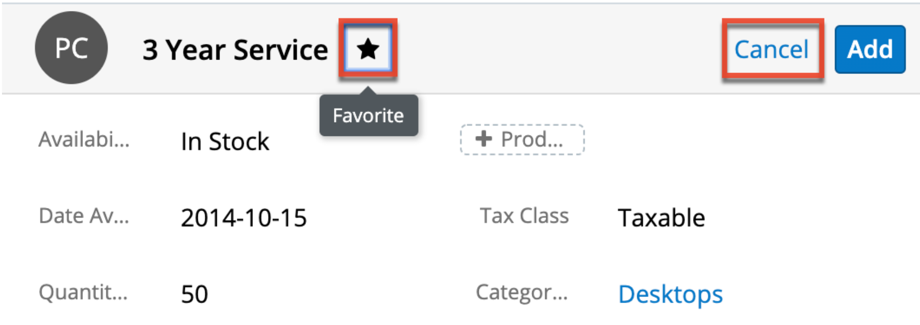
Note: You can click on the card icon or product name to add it as a revenue line item without reviewing the product.

After clicking the icon, the record's detail view opens. Click the "Add" button to add it to the opportunity as a revenue line item. To close the Product Catalog record's details without adding the product as a line item, click the "Cancel" button.



Favoriting Products via Dashlet

For products in the product catalog that you use often and would like easier access to, you can mark the product as a favorite when viewing the details of the record. Simply click the star icon to the right of the product's name in the upper left of the record view to designate it as a favorite. If you wish to remove the product as a favorite, click the star again to revert it to white. To close the product catalog record's details, simply click the Cancel button. After a product is marked as a favorite, it will appear under the Favorites tab of the Product Catalog Quick Picks dashlet.



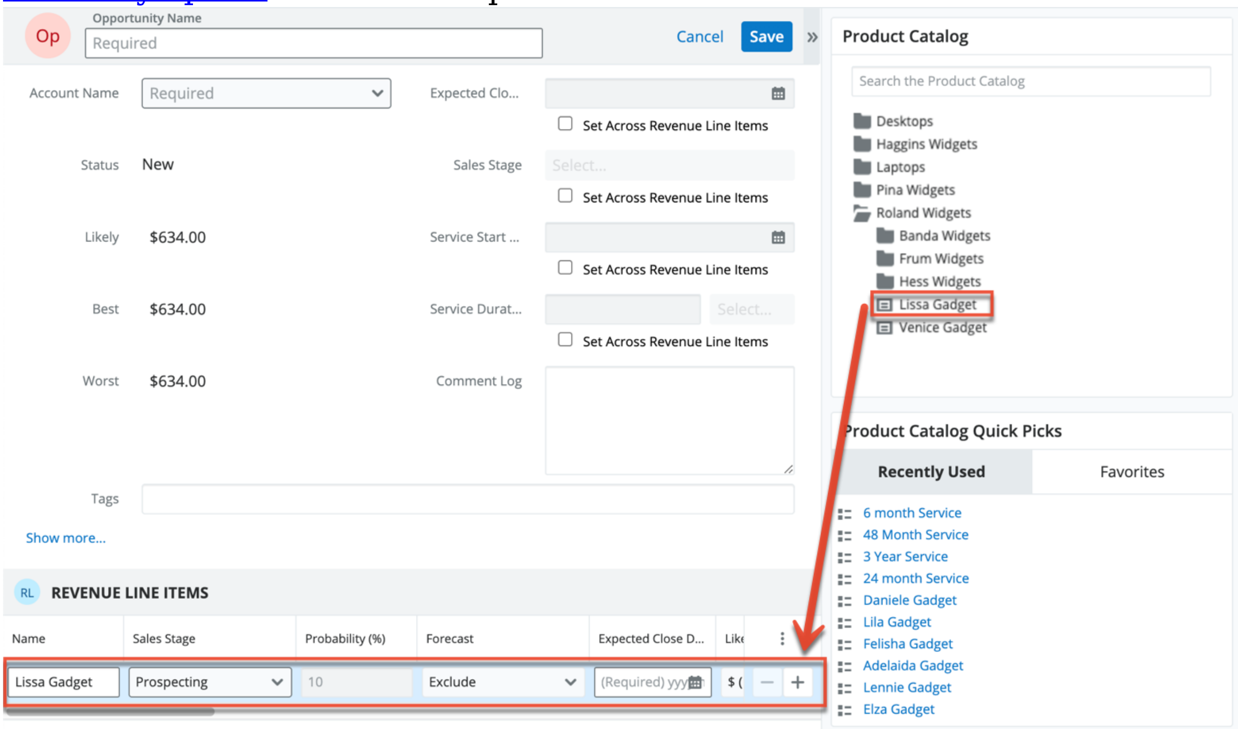
Creating Revenue Line Items via Product Catalog Dashlet

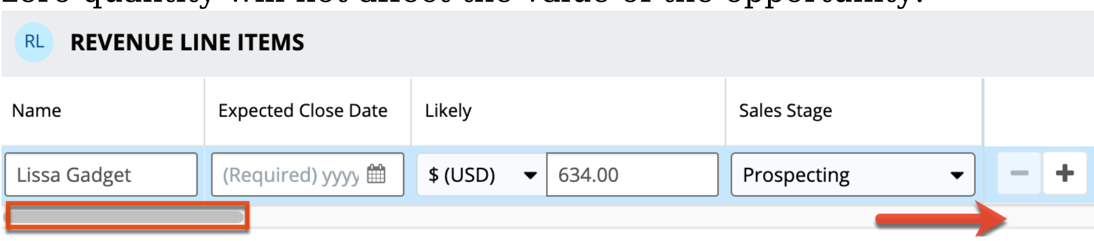
If you need to add a line item for a product that is in the Product Catalog, you can easily find and select the products with a status of "Active" directly from the Product Catalog dashlet, which is located next to the opportunity record when creating a new opportunity and also on the Opportunities Record Dashboard from an opportunity's record view. For more information on searching for products and interacting with the dashlet, please refer to the appropriate Product Catalog Dashlet subsections on this page.

Note: The Product Catalog records must be created before users can select products when adding line items. The Product Catalog, Product Categories, Product Types, and Manufacturers modules are accessible by all users. For more information on adding and modifying products in the product catalog, please refer to the Product Catalog documentation. When you select an item from the Product Catalog dashlet, the line item's tax class, cost, and manufacturer information will be pre-filled by values set by your administrator and therefore cannot be edited.

Use the following steps to add a revenue line item to a new or existing opportunity using the Product Catalog dashlet:
Note: You can follow the same steps below to add a line item using the Product Catalog Quick Picks dashlet.

1. Create a new opportunity record via any of the various creation methods explained in the User Interface documentation or navigate to a previously saved opportunity. For this example, we will select "Create Opportunity" from the Opportunity module's tab menu.
    - To view and use the Product Catalog dashlet with existing opportunity records, simply expand the opportunity's record-view dashboard (if needed) by clicking on the double-arrow icon next to the record's Edit button and then select the Opportunities Record Dashboard or any other dashboard that has been configured to display the Product Catalog dashlet.
2. On the Create screen, enter the general opportunity information in the form's fields.

3. The Product Catalog dashlet will be displayed to the right of the opportunity. When you are ready to add a new revenue line item, click on any card icon or product name in the dashlet to add it as an editable revenue line item.
   Note: Users can add revenue line items based on a product catalog item using their preferred currency (e.g., Euro) instead of the product catalog item's currency by enabling the [Create Revenue Line Items in Preferred Currency option]() in their user profile.
   

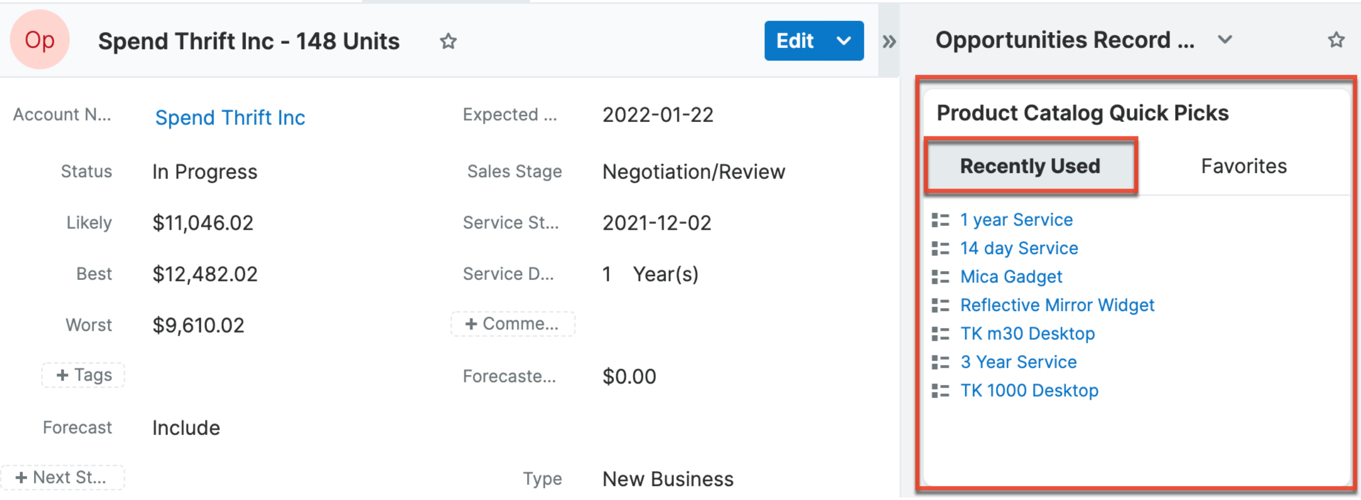
   For more information on searching for and adding products as line items, please refer to the appropriate [Product Catalog Dashlet]() subsections of this page.
   - For previously saved opportunities, clicking a product card icon or name will reveal a quick-create revenue line item record populated with the product's part number and unit price, which are copied from the Product Catalog.
4. Use the scroll bar to view all of the line item's available fields. Modify the Quantity field if the default value of "1" is not correct. Please note that users may enter line items with a quantity of zero to denote optional products, previously-paid items, or to handle other situations. Rows with zero quantity will not affect the value of the opportunity.
   

5. Click "Save" to save the opportunity and revenue line items together or, for existing opportunities, to add the line item to the Revenue Line Items

subpanel.

Product Catalog Quick Picks Dashlet

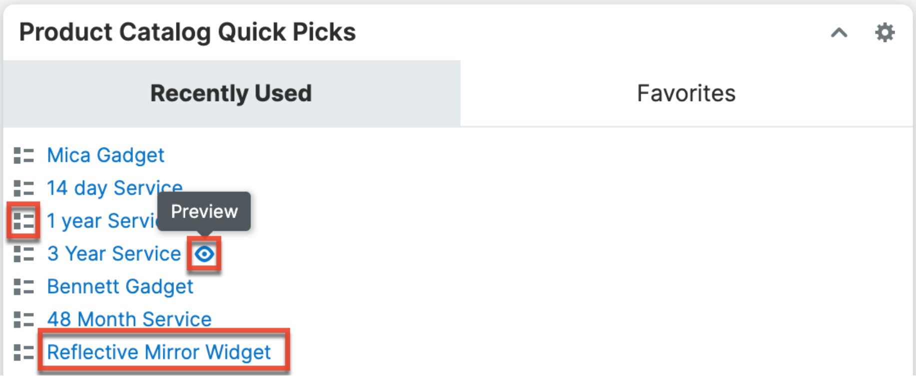
The Product Catalog Quick Picks dashlet provides easy access to product catalog records with a status of "Active" that you recently used or marked as favorites. The dashlet consists of two tabs (Recently Used, Favorites) and is located to the right of the page when creating a new opportunity, as well as in the Opportunities record view intelligence pane. If the dashlet is not displayed in the intelligence pane, you can add the dashlet by editing the dashboard. For more information on adding dashlets, refer to the Dashboards and Dashlets documentation. The Recently Used tab allows you to see a list of active products from the product catalog that you most recently added to an opportunity as a revenue line item. While the Favorites tab displays a list of active products that you have marked as favorites. For more information on marking products as favorites, refer to the Favoriting Products via Dashlet section of this page.



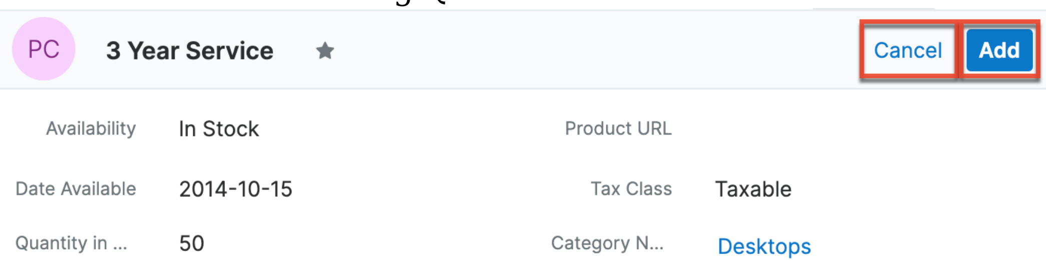
You can select products directly from the Product Catalog dashlet or the Product Catalog Quick Picks dashlet to instantly add it as a revenue line item to an opportunity. For more information on adding revenue line items to new or existing opportunities using the Product Catalog dashlet, refer to the Creating Revenue Line Items via Product Catalog Dashlet section of this page. Please note that you can follow the same steps to add revenue line items using the Product Catalog Quick Picks dashlet. Once the product is added as a revenue line item, you can refresh the page and it will appear under the Recently Used tab of the Product Catalog Quick Picks dashlet. The dashlet will display up to 10 products that you most recently used across opportunity records.

Previewing Products via Dashlet

If you wish to view the record details of the product prior to adding it as a revenue line item, you can hover over the product's name in the dashlet and click the preview icon. This will open the product catalog's record view.

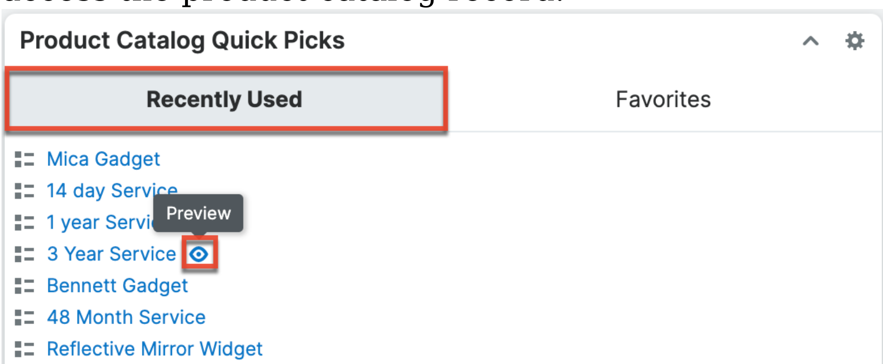


Click the Add button on the record view to add the product as a revenue line item or click "Cancel" to close the product catalog's record view without adding the product. Please note that you can also add the product as a revenue line item without viewing the record by clicking the card icon or the product name directly from the Product Catalog Quick Picks dashlet.

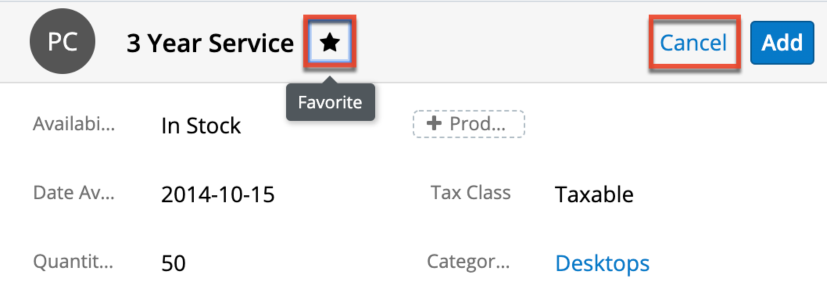


Favoriting Products via Dashlet

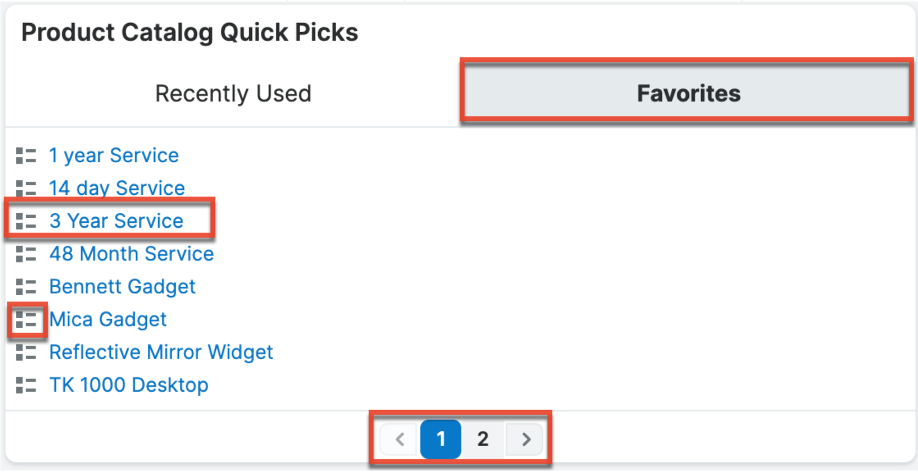
In addition to [favoriting]() a product when viewing the details of the record via the Product Catalog dashlet, you can also mark a product listed in the Product Catalog Quick Picks dashlet as a favorite. Simply hover over the desired product's name (e.g., 3 Year Service) under the Recently Used tab and click the preview icon to access the product catalog record.



Click the star icon to the right of the product's name in the upper left of the record view to designate it as a favorite. If you wish to remove the product as a favorite, click the star again to revert it to white. To close the product catalog record's details, simply click the Cancel button.



After a product is marked as a favorite, it will appear under the Favorites tab in alphabetical order. By default, the dashlet displays 8 products per page, and you can click the left and right arrow buttons to view the next or previous list of favorited products. You can also click the card icon or the product name under the tab to add it as a revenue line item to new or existing opportunities. Simply follow the steps covered in the [Creating Revenue Line Items via Product Catalog Dashlet] section of this page using the Product Catalog Quick Picks dashlet.



Importing Opportunities

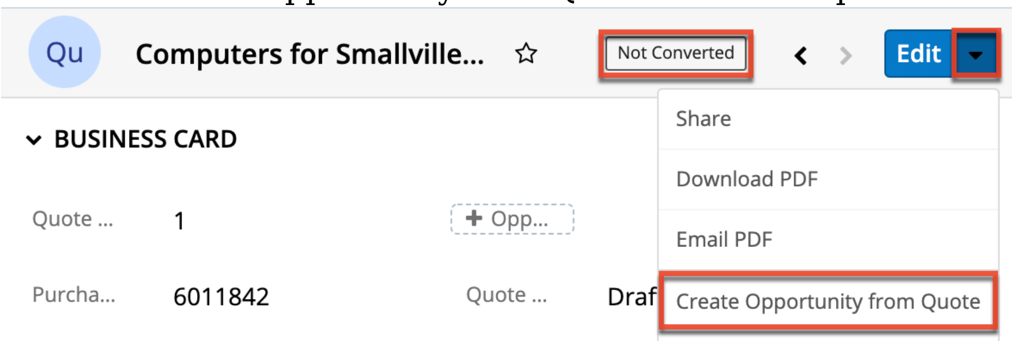
The import function allows you to push multiple opportunity records into Sugar using a .csv file instead of creating them one-by-one. When an opportunity is imported into Sugar, at least one revenue line item must also be imported and related to the opportunity in order to populate the amounts (e.g., best, likely, etc.), Expected Close Date, Sales Stage, Service Start Date, and Service Duration fields on the opportunity record. When you are importing opportunity and revenue line items, please be sure to import your opportunities first, followed by your revenue line items. Each revenue line item row must include its parent opportunity's ID as well as values for its amount fields (i.e., Best, Likely, Worst). For more information on importing, please refer to the Import documentation.

Quotes and Opportunities

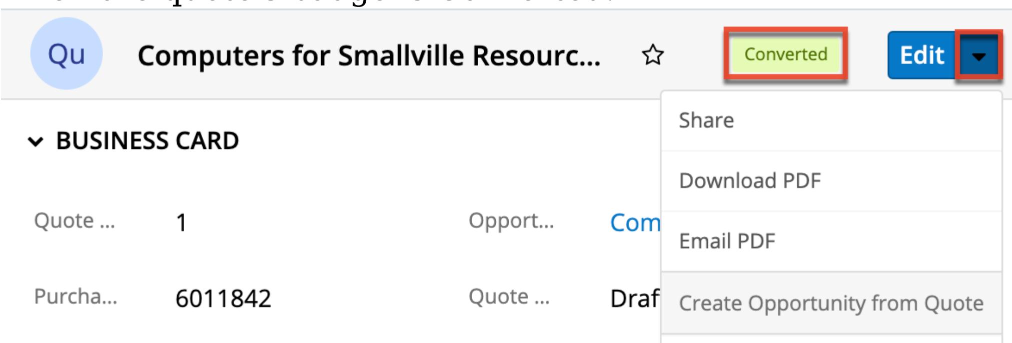
Quotes and opportunities both track sales throughout their lifecycle, but the two modules serve different purposes. Quotes allow you to communicate the details of a sale with customers while opportunities allow you to forecast potential sales and the possible ranges of their dollar amounts. To aid in using both modules, Sugar allows you to generate an opportunity from a quote as well as to generate a quote from a set of revenue line items.

Generating Opportunities From Quotes

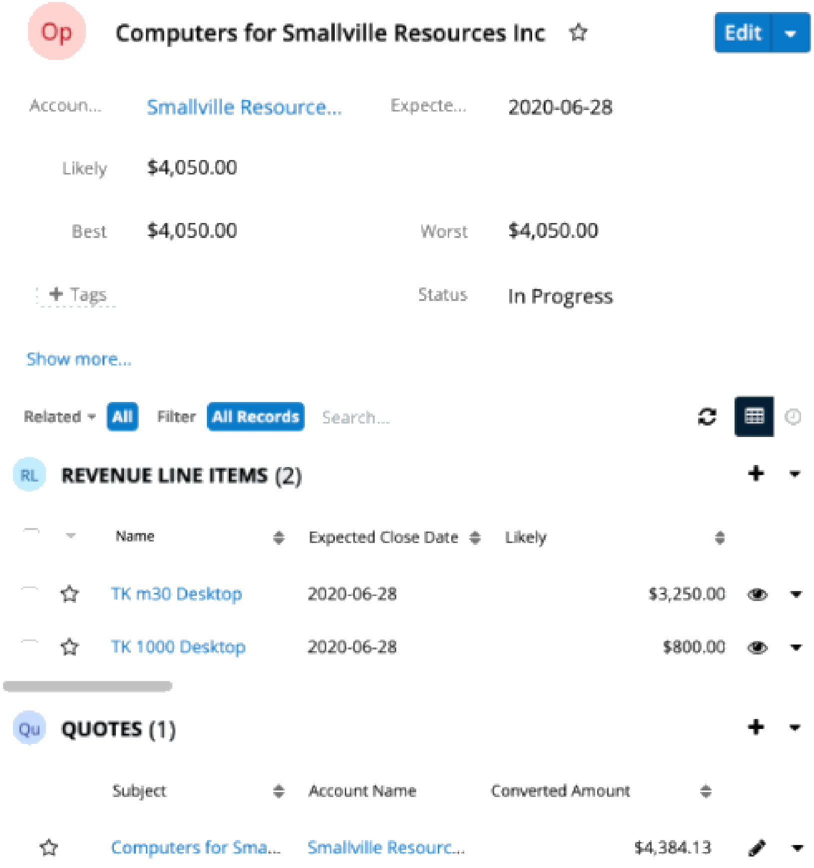
To generate an opportunity including its set of revenue line items from a quote, choose "Create Opportunity from Quote" from the quote record's Actions menu.



Note: Quotes that are already "Converted" (as indicated by the badge adjacent to the quote's name in the example pictured here) cannot be re-converted into an opportunity. The "Create Opportunity from Quote" menu option will be grayed out when the quote's badge is Converted.



After selecting the Create Opportunity... option, you will be navigated to the newly created and saved opportunity, which will be pre-populated with the original quote's values in the Name, Account Name, Expected Close Date, Best, Likely, and Worst fields. In addition, the opportunity's Type will default to "New Business" and the Status to "In Progress".



The quoted line items related to the original quote will be copied to the new opportunity as revenue line items. By default, the Sales Stage values for the revenue line items are set to "Proposal/Price Quote", the Probability to "65%", and the Type to "New Business".

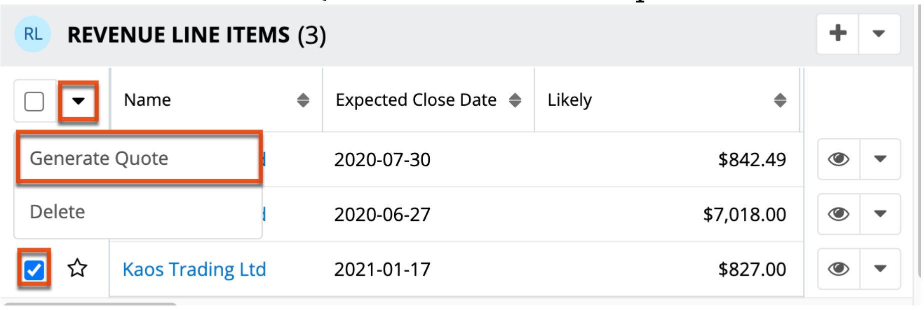
Because the probability defaults to 65%, the revenue line items will, by default, have a Forecast field value of "Exclude," meaning they will not be included in forecasts. You can edit the revenue line items and the opportunity record to modify any of these values as needed. The originating quote will be related to the new opportunity and can be found in the Quotes subpanel on the opportunity's record view.

For more information on creating an opportunity from a quote, please refer to the [Creating Opportunities from Quotes](#) section of the Quotes documentation.

Generating Quotes From Revenue Line Items

Quotes may be generated from one or more of an opportunity's revenue line items via the Opportunities record view's Revenue Line Items subpanel.

Use the following steps to generate a quote from an opportunity's Revenue Line Items subpanel:

1. Navigate to the Revenue Line Item subpanel on an opportunity's record view.
2. Select the revenue line items you wish to include on a quote.
3. Choose "Generate Quote" from the subpanel's Actions menu.


4. The new quote is opened in record view to allow additional changes. Make any necessary changes to the quote's fields then click "Save" to finalize the new quote record.

The quote record is automatically generated with a quoted line item record for each revenue line item record. For more information, please refer to the Quotes and Quoted Line Items documentation.

Purchases, Purchased Line Items, and Opportunities

While opportunities and revenue line items represent the historical data captured during the sales cycle, the purchases and purchased line items represent the products or services your company has successfully sold to your accounts. When opportunities, and their related revenue line items, reach the "Closed Won" stage of the sales cycle, related purchase and purchased line item records can be automatically generated and updated. For more information on how these modules work together, refer to the Purchases and Purchased Line Items page.

Emails and Opportunities

Opportunities may be related to emails by being selected in the email's Related To field. These relationships allow the opportunity to display all relevant email correspondence in the Emails subpanel and History dashlet on an opportunity's record view. An opportunity's Emails subpanel and History dashlet may also display emails belonging to the contacts related to the opportunity.

Emails Subpanel

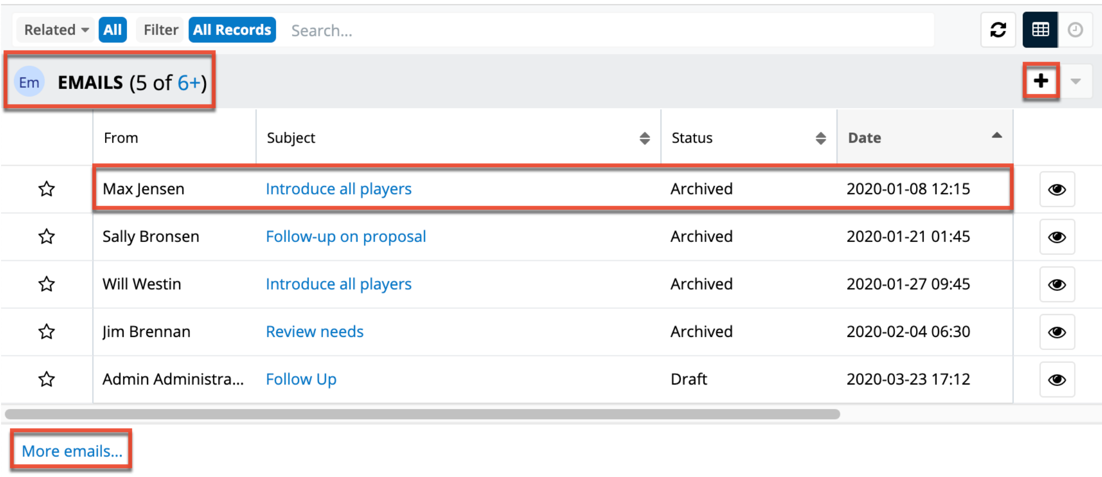
The Emails subpanel in the Opportunities module displays emails which are associated with the opportunity record in a variety of ways:

- **Related to the opportunity**: If the opportunity is selected in the email's Related To field, the email and opportunity are explicitly related, and the email will appear in the opportunity's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the Emails documentation.
- **Related to the opportunity's related contacts**: If the email is related, either explicitly or implicitly, to a contact record which is related to the opportunity, the email will appear in the opportunity's Emails subpanel and History dashlet.
    - **Note**: Administrators can enable or disable an opportunity from displaying related contact's emails via Admin > Related Contacts Emails. For more information, please refer to the Email documentation in the Administration Guide.

The Emails subpanel allows the following functions to be performed:

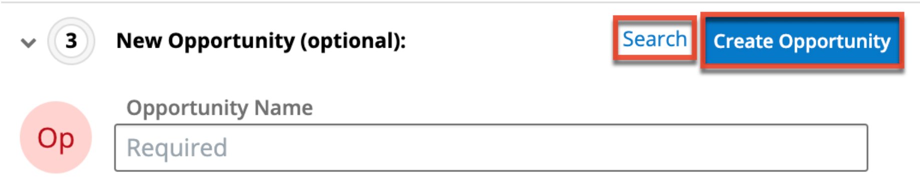
- **Email Details**: To view the details of an email, click the subject to open it in detail view.
- **Record Count**: Subpanel headers display the total count of related records (e.g., "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g., "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- **Collapse or Expand**: Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
    - **Note**: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.
- **Column Widths**: Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- **Column Sort**: Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g., from ascending to descending).

- **Compose a New Email**: Click the Plus button on the upper right of a subpanel to create a new email with, by default, a relationship to the opportunity you are currently viewing. The email will automatically select the opportunity in the Related To field.
    - **Note**: To send email from Sugar, users must configure their outbound email server via Emails > Email Settings or, if using the system email account to send email, the system's outbound email server must be configured by an administrator in Admin > System Email Settings.
    - **Note**: Because creating a new related record opens a drawer on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- **More Records**: By default, Sugar displays up to five records in each subpanel, though administrators can alter the number via Admin > System Settings as described in the System documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g., "More emails...") at the bottom of the subpanel to load the next set of records.



Leads and Opportunities

Once a lead has been evaluated and qualified, it can be converted into an opportunity in addition to a contact and account. Depending on how your administrator has configured the Lead Conversion layout, it may be possible or even required to create an opportunity or relate to an existing opportunity during lead conversion. For more information on opportunities and lead conversion, please refer to the Leads documentation.

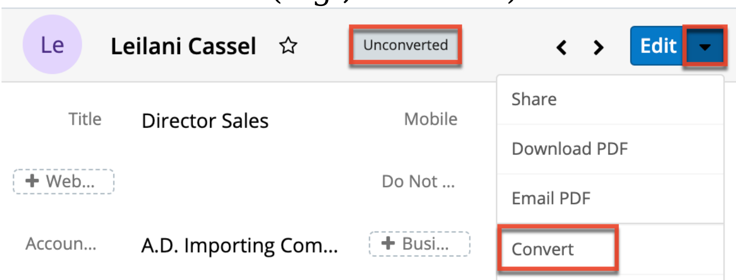


Creating via Lead Conversion

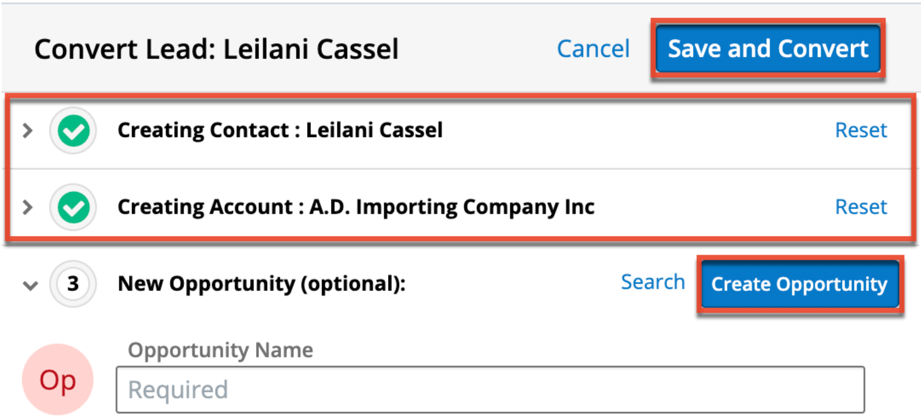
Sugar enables you to create a new opportunity record during the lead conversion process. For more information about lead conversion, please refer to the Leads documentation.

Use the following steps to create an opportunity during lead conversion:

1. Navigate to a Leads record view.
2. Select "Convert" from the Actions menu or click the Unconverted button to initiate the lead conversion process.
    - **Note**: Sugar will automatically perform a duplicate check for the modules (e.g., Contacts) on the Convert Lead page.

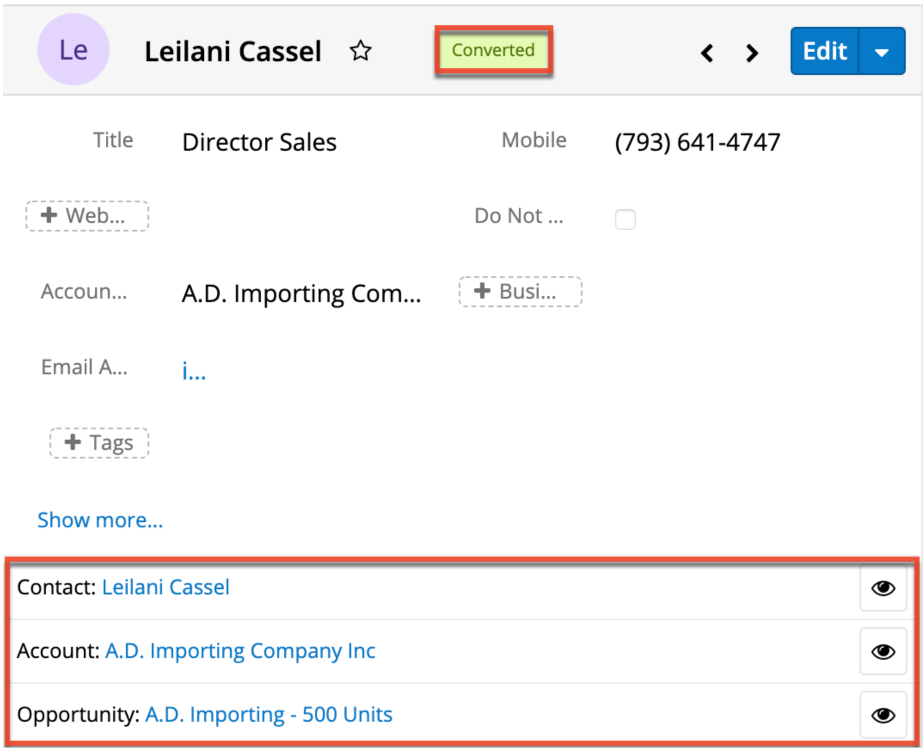


3. If there are no duplicate records found for the required modules (Contacts, Accounts) in lead conversion, the new records will be automatically marked for creation on the Convert Lead page and associated to the lead. The panel will be collapsed as well, but you can click the header to open the panel and view the record's details.
    - **Note**: If there are duplicate records detected for a module, you can either select an existing record or create a new record. For more information, please refer to the Leads documentation.
4. Once the Contact and Account panels are completed, you can proceed to the Opportunity panel to create an opportunity record.
5. Enter the relevant information on the displayed record view then click "Create Opportunity". Please note that some opportunity fields will not be editable as they are based on the revenue line item you entered.
    - **Note**: Some opportunity fields (e.g., Expected Close Date, etc.) will not be editable as they are based on the related revenue line item(s).



6. Once all the appropriate panels are complete, click "Save and Convert" to convert the lead.

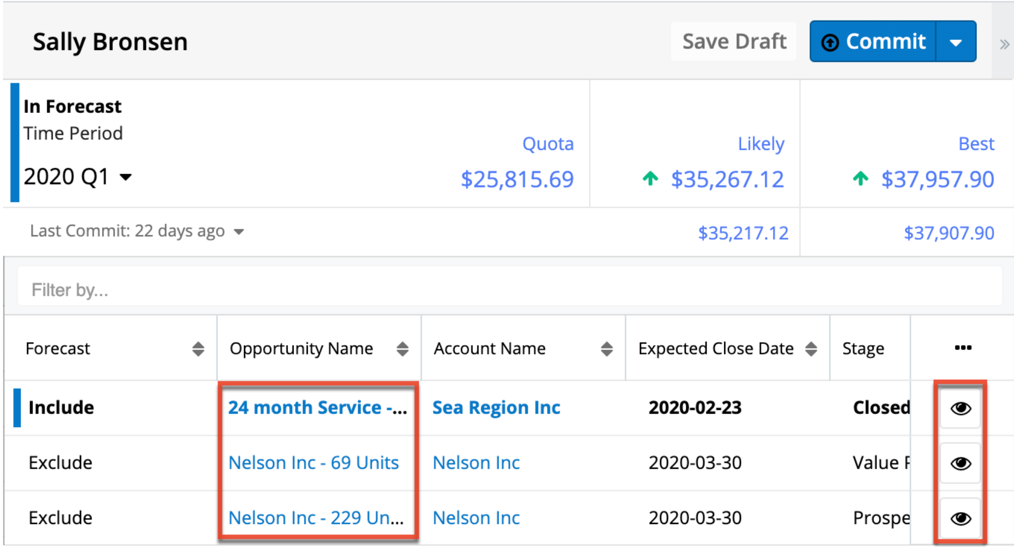
Once the lead has been converted successfully, the lead's record view will display the Converted badge in the header and show the converted contact, account, and opportunity below the record's detail. You can click the Preview icon to the far right of each record's row to view the details of the converted opportunity and other records.



Forecasts and Opportunities

Sugar's Forecasts module incorporates opportunity records to build forecasting worksheets and predict sales. Forecasts are based on the monetary value of the revenue line items 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.

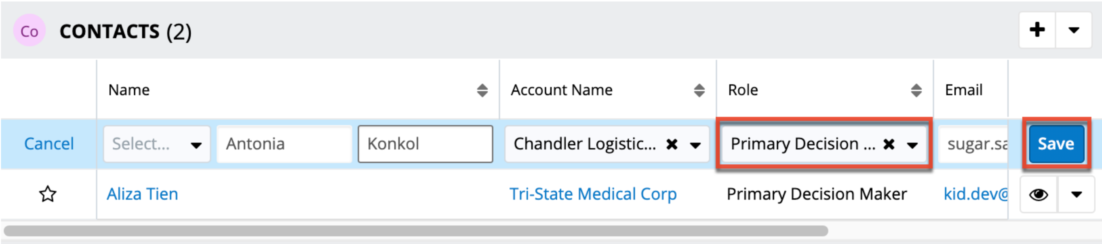
Based on the chosen filters (include, exclude, etc.), you will see all or some of your assigned revenue line items for the currently selected time period. The Forecast column displays an automatic category indicating whether or not the revenue line item's amounts are included in the totals for the specified time period. You can work directly with your revenue line item records by inline editing their probabilities and amounts from the Forecasts module or by clicking the Name field to open a record in record view where you can make additional edits. You can also view a revenue line item's details directly from the forecast worksheet by clicking the Preview icon to the far right of each row. For more information on editing and managing forecasts, please refer to the Forecasts documentation.



Contacts and Opportunities

Each opportunity can relate to one or more contacts that are displayed in a subpanel on the Opportunities record view. The Contacts subpanel allows users to select an opportunity-specific 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 for the current opportunity.

To select a role, simply choose "Edit" from the Actions menu on the far right of the record's row in the Contacts subpanel. The record's row will open up within the subpanel allowing you to edit the individual fields. Select the appropriate role for the contact then click "Save".



The selected role will be displayed adjacent to the contact for only the current opportunity.

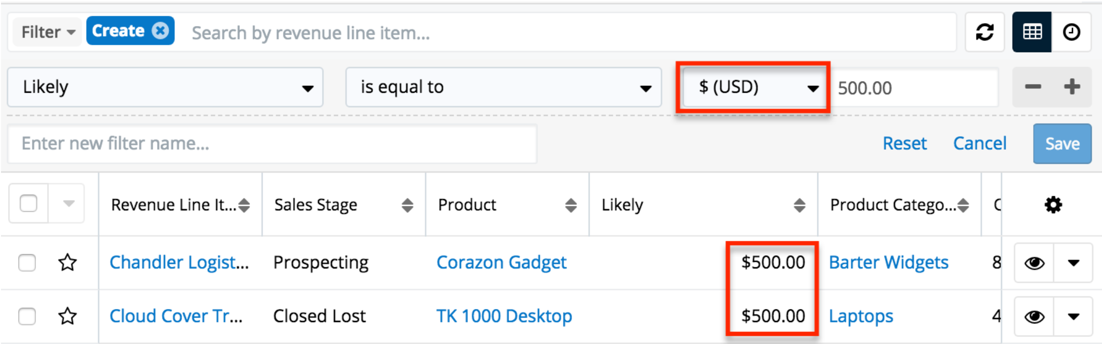
Currencies and Opportunities

Sugar allows your organization to perform business around the world by supporting multiple currencies. Administrators must first add desired currencies and exchange rates to Sugar via Admin > Currencies. They also have the ability to set the instance's default currency via Admin > Locale. This is typically the currency of the country where the majority of business is conducted. For more information, please refer to the System documentation in the Administration Guide.

Users can specify their own preferred currency in their user profiles. If they choose to also enable the Show Preferred Currency option in their profiles, currency fields throughout Sugar will display in their chosen currency. For more information, please refer to the Getting Started documentation. Finally, each opportunity record has a Currency field where you will specify the currency being used for this particular business transaction.

Filtering on Currency Fields

Currency fields are filtered according to the record's set currency rather than being standardized to the user's preferred or system default currency. In the list view, filtering opportunities by a currency field allows you to specify the filter's currency. Only records matching both the chosen currency and amount range will be returned. For example, if you filter based on a Likely value that equals 500 in US Dollars, then the search result will return all opportunities with a Likely value of $500 but will exclude values of €500 or other currency values which are equivalent to $500.



Note: By contrast, when filtering values in the Reports module, any record matching the specified amount or range will be returned regardless of the record's currency. For example, if one revenue line item's Likely value is $500 in US Dollars and another's is €500 in Euros, filtering a report for a Likely value of exactly 500 will return both records in the report.

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 Likely, Best, and Worst amounts 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:

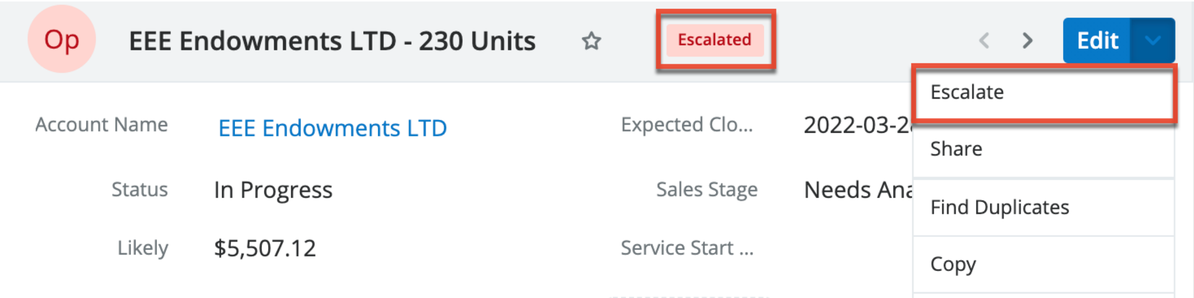
- The opportunity undergoes a save event (e.g., mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved in the opportunity.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job that 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 Likely, Best, and Worst amounts display in the user's preferred currency. In this case, the conversion rate used to calculate the converted amounts 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 fields 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 Getting Started documentation.

For more information about currency exchange rates, please refer to the System documentation in the Administration Guide.

Escalations and Opportunities

The Escalations module is used to track the escalation of a specific record, such as an opportunity. Use the Escalate option in the opportunity's record view Actions menu to create an escalation for the opportunity. As long as the opportunity has at least one open escalation, the Escalated field is displayed as a red badge with the text "Escalated" at the top of record view and the preview. It can also be displayed in the Record View dashlet and list view.



Escalating an opportunity adds the opportunity's account to the Accounts subpanel on the escalation automatically when the escalation is saved, which means that that escalation will also appear in the account's Other Related Escalations subpanel automatically. Note that if the escalation is then updated to target a different record with a related account, the new account is added but the previous account is not removed. See the Escalations page for more details on how escalations work.

Working With Sugar Modules

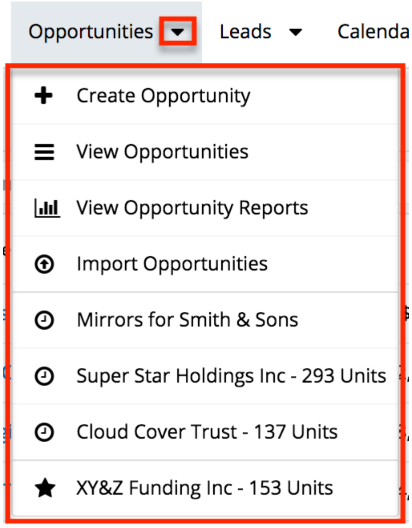
The Opportunities module uses Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Opportunity Menus

The Opportunities module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Opportunities-specific functionality, within this page.

Module Tab Menu

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 click the triangle in the Opportunities tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important operations within the module. The Recently Viewed menu displays the list of opportunities you most recently viewed. The Favorites menu displays the list of opportunities you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Opportunity	Opens the record 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.

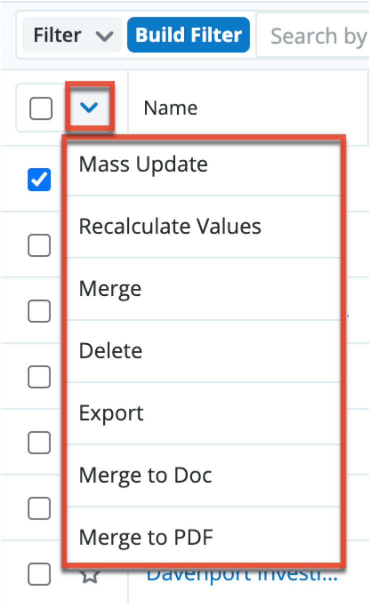
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Opportunities list view displays all opportunity records and allows for searching and filtering to locate specific opportunities. You can view the basic details of each record within the field columns of the list view or click an opportunity's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual opportunity records or click the checkbox in the list header to select all records displayed in the current set of list view results.



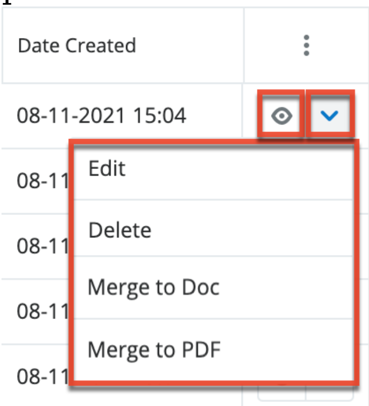
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update two or more opportunities at a time.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Merge	Merge two or more duplicate opportunities.

Delete	Delete one or more opportunities at a time.
Export	Export one or more opportunities to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual opportunity directly from the list view.



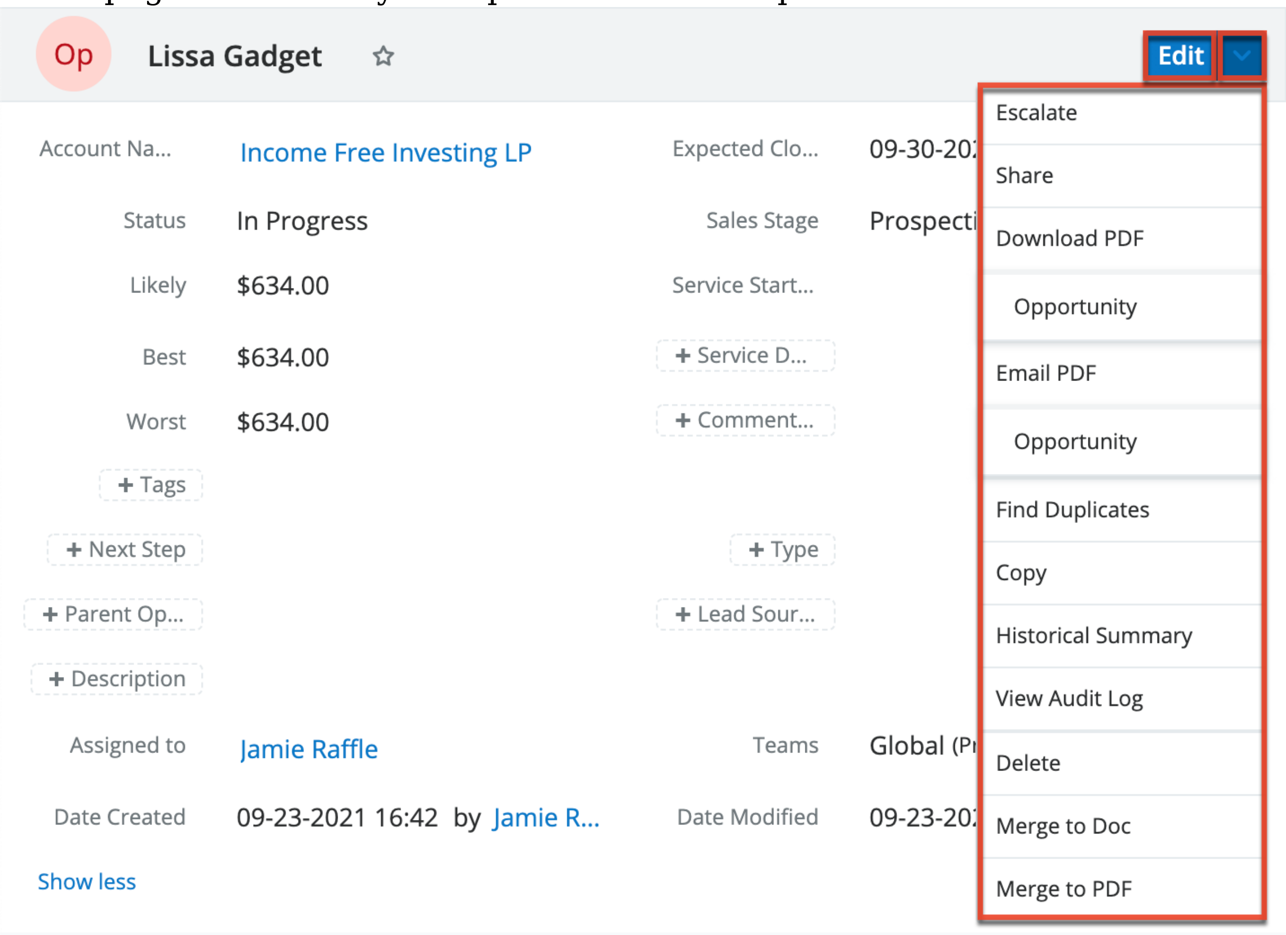
The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this opportunity in the intelligence pane.
Edit	Edit this opportunity.
Follow	(Available if Activity Streams are enabled) Follow changes to this contact in your activity stream.
Delete	Delete this opportunity.

Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Opportunities record view displays a single opportunity in full detail including its fields, subpanels of related records, and activity stream. To access an opportunity's record view, simply click a hyperlinked opportunity name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this opportunity.
Escalate	Create an escalation record related to the current record.
Share	Share a link to this opportunity via email. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Download PDF	Download the opportunity information as a PDF file. • This menu option is only visible if the administrator has created a PDF template for the Opportunities module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.
Email PDF	Email the opportunity information as a PDF attachment. • This menu option is only visible if the administrator has created a PDF template for the Opportunities module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Find Duplicates	Locate potential duplicates of this opportunity.
Copy	Duplicate this opportunity.
Historical Summary	View a historical summary of activities

	(e.g., calls, meetings, etc.) related to this opportunity.
View Audit Log	View a record of changes to this opportunity.
Delete	Delete this opportunity.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules.

Content Link	Description
Creating Opportunities Basic Opportunity Creation Creating via Quick Create Creating via Subpanels Creating via Duplication Importing Opportunities	The Creating Records section covers the various methods of creating new opportunity records, including via the Create button in the Opportunities module, the Quick Create menu on the upper right of every Sugar page, via the Opportunities subpanel on related module records, duplication of an existing opportunity record, and importing a list of opportunities into Sugar using a .csv spreadsheet. Note: For more information on importing opportunities with revenue line items, please refer to the Importing Opportunities section of this page.
Viewing Opportunities Viewing via List View Viewing via Record View Viewing via Recently Viewed	The Viewing Records section describes the various methods of viewing opportunity records, including via the Opportunities list view and record view,

Viewing via Dashlets Viewing via Activity Streams Viewing via Preview Viewing via Reports	the Recently Viewed menu in the Opportunities module tab, list view dashlets showing opportunity information, activity stream entries concerning opportunity updates or where a user mentions an opportunity, previewing opportunities in the right-hand side panel, and reports displaying opportunity data.
Searching for Opportunities Global Search List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to the two searching methods for locating opportunities: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Opportunities module.
Opportunities List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview Record Actions Menu More Opportunities Activity Stream Dashboards	The List View section walks through the many elements of the Opportunities List View layout which contains a filterable list of all opportunity records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Opportunities list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.
Opportunities Record View Favorite Designation Following Designation Next or Previous Record Actions Menu Show More Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Activity Stream Dashboards	The Record View section walks through the many elements of the Opportunities Record View layout which contains detailed information about a single opportunity record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Opportunities record view are described in the Record View Actions Menu section of this page.

Editing Opportunities Editing Inline via Record View Editing via Record View Editing Inline via Subpanels Editing Inline via List View Mass Editing via List View	The Editing Records section describes the various methods of editing existing opportunity records, including inline via the Opportunities record view, in full edit mode on the record view, inline via the Opportunities subpanel on related module records, inline via the Opportunities list view, and via the Mass Update option on the list view.
Deleting Opportunities Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted opportunities, including via the opportunities record view, an individual record's Actions menu on the Opportunities list view, and the Mass Actions menu on the list view. Note: For data integrity purposes, an opportunity related to a revenue line item with a "Closed Won" or "Closed Lost" status may not be deleted. In addition, revenue line items in these statuses may not be deleted. If revenue line items are not enabled for your instance, an opportunity may be deleted only if its Status field is not set to "Closed Won" or "Closed Lost". For data integrity purposes, closed opportunities may not be deleted.
Exporting Opportunities	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of opportunities and all their data as a .csv file for use outside of Sugar (e.g., in Microsoft Excel).
Recalculating Calculated Values	The Recalculating Calculated Values section provides instructions on utilizing the Recalculate Values list view option to update calculated field values in the module if the administrator has changed the field's formula via Admin > Studio.
Finding Duplicate Opportunities	The Finding Duplicate Records section

	provides instructions for locating duplicate opportunity records. If searching on matching fields (e.g., Opportunity Name) identifies one or more duplicates, they can be merged into a single record.
Merging Opportunities Merging via List View	The Merging Records section provides instructions for merging duplicate opportunities which will combine field values and related records into a single opportunity.
Viewing Opportunity Historical Summaries	The Viewing Record Historical Summaries section describes the Historical Summary record view option which displays quick details of the opportunity record's related calls, meetings, emails, notes, and tasks.
Viewing Opportunity Audit Logs	The Viewing Record Audit Logs section describes the View Audit Log record view option which displays a history of changes to the opportunity's audited fields.
Opportunity PDFs Downloading Opportunity PDFs Emailing Opportunity PDFs	The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of opportunity information as configured by an administrator via Admin > PDF Manager.
Favoriting Opportunities Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking opportunities as favorites, including via the Opportunities list view, Opportunities record view, or any Opportunities subpanel appearing on the record view of a related module. Favoriting an opportunity allows you to easily access it from list views, dashlets, or the Opportunities module tab.
Following Opportunities Following via List View Following via Record View	The Following Records section describes the various methods of marking opportunities as "Following", including via the Opportunities list view and record view. Following an opportunity

	causes its activity stream updates to be included on your Home page and Opportunities list view activity streams so that you can easily keep up with changes and user posts on the record.
Sharing Opportunities	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the opportunity record. If the recipient is logged into Sugar, clicking the link will bring them directly to the opportunity's record view.

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Revenue Line Items

Overview

Sugar's Revenue Line Items module consists of individual line items of potential business that are included on an opportunity record and tracked through the sales life cycle. The opportunity record acts as a header for one or more revenue line item records. This allows for greater granularity when working opportunities and forecasting since each line item within an opportunity can have its own sales stage and probability as well as being included or excluded from a user's forecasting worksheet individually. For more information about how opportunities and revenue line items interact, please refer to the Opportunities and Revenue Line Items section of this page.

Each revenue line item may be related to a product from your organization's Product Catalog. Doing so will cause the product's values to automatically populate matching fields on the revenue line item. For more information, please refer to the Products and Revenue Line Items section of this page.

Before continuing, be aware of the following access and visibility notifications:

- You will only be able to see revenue line item 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.
- The Revenue Line Items module is not available for Sugar Serve and Sugar Professional users. For more information on license types and the functionality available for each type, refer to the User Management documentation.
- If your instance is configured to use opportunities alone without revenue line items, please refer to the Opportunities documentation in the Sugar Professional Application Guide. For more information about changing your opportunities model via Admin > Opportunities, please see the Opportunities Configuration documentation in the Administration Guide.

This documentation will cover information and actions specific to the Revenue Line Items module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting line items, please refer to the Working With Sugar Modules section of this page.

Revenue Line Item Fields

The Revenue Line Items module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role 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 related opportunity belongs.
Add On To[2,4]	The related purchased line item representing a coterminous add-on to an existing purchase. The field is enabled for revenue line items marked as a "Service". While available on the revenue line item record view, the recommended method of creating coterminous add-ons is from the purchased line item record you wish to add on to. For steps to complete, refer to the Purchases and Purchased Line Items documentation.

	Note: When a purchased line item record is selected via the filtered type ahead or search and select, the Service End Date field inherits its value from the purchased line item and is a fixed value. Service start date can be changed which automatically adjusts the service duration value.
Assigned To	The Sugar user assigned to the revenue line item.
Best	The most optimistic amount that may be won for the revenue line item. The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Revenue Line Items section of this page. If no value is provided, the Best field will be automatically filled with the value of the Likely field or the value of the Calculated Amount field. Unless the sales stage is set to "Closed Lost", the revenue line item's Best value will roll up into the parent opportunity.
Calculated Amount	The line item's value based on the Quantity, Unit Price, Service Duration, and Discount Amount fields. This value is automatically calculated and cannot be directly modified. To adjust the Calculated Amount, you must edit the revenue line item's quantity, unit price, service duration, or discount amount. **Note**: Service Duration is only factored

	into the calculation for line items related to a product catalog record marked as a service.
Campaign	The campaign, if any, from which the revenue line item opportunity originated.
Category	The category to which the revenue line item's product belongs. **Note**: The default value is populated with the Parent value of a selected product and may be modified manually. For more information on creating product categories, please refer to the Product Catalog documentation in the Application Guide.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
Cost	The actual cost of the revenue line item's product. The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Revenue Line Items section of this page. **Note**: The value is automatically populated based on the selected product and may not be modified manually
Date Created	The date the revenue line item record was created.

Date Modified	The date the revenue line item record was last modified.
Description	A description or other information about the revenue line item.
Discount Amount	The discount percentage or amount provided for the revenue line item.
Expected Close Date[3]	The date when the revenue line item is expected to close or already has closed.
Forecast[3]	The revenue line item's commit range for forecasting (e.g., "Include", "Exclude", etc.). **Note**: The available values are determined by the Ranges configuration in Admin > Forecasts. For more information on configuring forecasting ranges, please refer to the Forecasts documentation in the Administration Guide.
Forecasted Likely	Calculated as the revenue line item's Likely value if the Forecast field is set to "Include". **Note**: This field is not displayed on the layout by default.
Generate Purchase[4]	Indicates if a purchase record should be automatically created when the revenue line item is "Closed Won". **Note**: This field is not displayed on the layout by default.
Generated Purchased Line Item[4]	The related purchased line item record that was automatically created.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
Lead Source	The source (e.g., Trade Show) from which the revenue line item opportunity originated.
Likely	The most likely amount that may be won for the revenue line item.

	The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Revenue Line Items section of this page. If no value is provided, the Likely field will be automatically filled with the value of the Calculated Amount field. Unless the sales stage is set to "Closed Lost", the revenue line item's Likely value will roll up into the parent opportunity.
List Price[1]	The list price of the revenue line item's selected product.
Mft Part Number[1]	The manufacturer's part number for the revenue line item's product, if any, selected from the Product Catalog.
Modified by Name	The Sugar user who last modified the revenue line item record.
Next Step	The succeeding stage of the revenue line item's sales cycle.
Opportunity Name	The opportunity to which the revenue line item belongs.
Probability (%)	The revenue line item's current likelihood of being won. **Note**: This value is calculated based on the selected Sales Stage and cannot be edited.
Product[1]	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 Product Catalog documentation in the Application Guide.

Quantity	The number of products being purchased.
Renewable[2]	For line items with "Service" enabled, select whether or not the service offered can be renewed for additional time periods. The Renewable field is used to trigger pipeline automation, which automatically generates new opportunities for the subsequent period when a renewable service is sold.
Renewal[2]	A read-only checkbox indicating the record is a renewal. In Sugar Sell, this field is automatically set during renewal generation when a renewable service line item is "Closed Won". **Note**: This field is not on the layout by default.
Renewal Revenue Line Item[2]	The related renewal revenue line item. In Sugar Sell, this field is automatically set during renewal generation when a renewable service line item is "Closed Won". **Note**: This field is not on the layout by default.
Sales Stage[3]	The revenue line item's current state in the sales process (e.g., Prospecting, Qualification, etc.). **Note**: When the revenue line item's sales stage is set to "Closed Lost", the values (e.g., Likely, Best, etc.) associated with the revenue line item no longer roll up into the parent opportunity.
Service[1,2]	Designate this line item as a service. Enabling the Service field will make the Service Duration (required), Service Start Date (required), and Renewable fields available.
Service Duration[1,2,3]	For line items with "Service" enabled, the period of time that this service covers. The Service Duration and Service Start Date fields are used to calculate the Service End Date and, when the Renewable field is set to yes,

	the Service Duration will determine the expected close date for future service opportunities. **Note**: When the line item is related to a product catalog record, the service duration value is inherited. If the product catalog record does not have its Lock Duration field checked, the revenue line item's service duration value can be edited.
Service Start Date[2,3]	For line items with "Service" enabled, select the date that the service will begin. The Service Duration and Service Start Date fields are used to calculate the Service End Date. This field is inherited from the product catalog but can be edited on a line-item basis.
Service End Date[2]	For line items with "Service" enabled, the Service End Date is calculated using the Service Duration and Service Start Date fields. Because this field is automatically calculated, it cannot be edited directly.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Tax Class[1]	Tax classification (e.g., taxable, non-taxable) for the revenue line item's product, if any, selected from the Product Catalog.
Teams	The Sugar team(s) assigned to the revenue line item record.
Type	The type of the revenue line item's business (e.g., New Business or Old Business).
Unit Price[1]	The unit price of the revenue line item's product. The amount will display in the system default currency or, if your Show

	Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Revenue Line Items section of this page.
Weight	The weight of the product, if any, selected from the Product Catalog.
Worst	The least optimistic amount that may be won for the revenue line item. The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Revenue Line Items section of this page. If no value is provided, the Worst field will be automatically filled with the value of the Likely field or the Calculated Amount field. Unless the sales stage is set to "Closed Lost", the revenue line item's Worst value will roll up into the parent opportunity.

[1] When a revenue line item is related to a product catalog record, this value automatically populates from the related product and cannot be modified on the revenue line item record. For more information on creating and managing records in the Product Catalog, please refer to the Product Catalog documentation in the Application Guide.
[2] For more information on service-related fields, refer to the Services and Renewable Revenue Line Items section of the Opportunities documentation.
[3] This field can be updated from the opportunity record. For more information, refer to the Updating Cascading Fields via Opportunities Module section.

[4] This field's value is only visible to Sugar Sell users; when this field appears on layouts, users without a supported license type will see a placeholder containing the text "License Required" instead of the field's value. See the User Management page for more details on license types.

Sales Stages

A sales stage identifies the current stage (e.g., Prospecting, Qualification, etc.) that the revenue line item is in during the sales cycle. When you select a sales stage in the revenue line item 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, please refer to the Adding Custom Sales Stages and Probabilities to Opportunities article.

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	**Probability**	**Suggested Definition**
Prospecting	10	This is the first stage in the sales process and indicates that the opportunity or revenue line item with this prospect is new and needs to be qualified by a sales representative.
Qualification	20	The sales representative is currently interacting with the prospect to determine if a sales opportunity exists.
Needs Analysis	25	After determining that the prospect has an interest in the products or services, the sales representative now uncovers the prospect's business challenges.
Value Proposition	30	After uncovering the

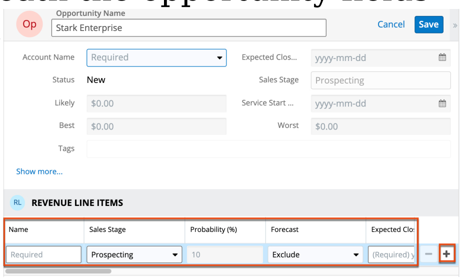
		prospect's business challenges, the sales representative now maps the company's products and/or services to the prospect's business challenges and describes the value of the solution.
Id. Decision Makers	40	After determining that there is a match between the prospect's business challenges and the company's products and/or services, the sales representative now identifies the decision-makers necessary to close this opportunity or revenue line item.
Perception Analysis	50	The sales representative analyzes the prospect's perceived value of the company's solution at this stage in order to prepare the appropriate combination of products and services for the sales quote.
Proposal/Price Quote	65	The sales representative delivers the proposal, sometimes called the price quote, to the prospect.
Negotiation/Review	80	The sales representative reviews and negotiates the proposal with the prospect.
Closed Won	100	The sales representative has won this opportunity or revenue line item and the company can now bill the customer.
Closed Lost	0	The sales representative has lost this opportunity or revenue line item.

Opportunities and Revenue Line Items

In Sugar, the opportunity serves as a header for a set of revenue line items, and the opportunity's amount and probability fields are roll-ups of this revenue line item data. Each revenue line item represents the prospective sale of an individual product. This means that each opportunity must relate to one or more revenue line items, and each revenue line item must relate to an opportunity. When creating an opportunity, you will be required to also create at least one revenue line item in a subpanel beneath the opportunity fields as described in the [Creating Simultaneously With Opportunities] section of this page. Special consideration also needs to be given to the importing of opportunities and revenue line items as discussed in the [Importing Revenue Line Items] section below. Revenue line items and their relationship with opportunities are unique in that they can be deleted from Sugar via the Revenue Line Items subpanel while viewing an opportunity. Instructions for doing so are covered in the [Deleting via Opportunities Module] section below.

Creating Simultaneously With Opportunities

When creating an opportunity, a subpanel appears beneath the opportunity fields where you must create one or more revenue line items.



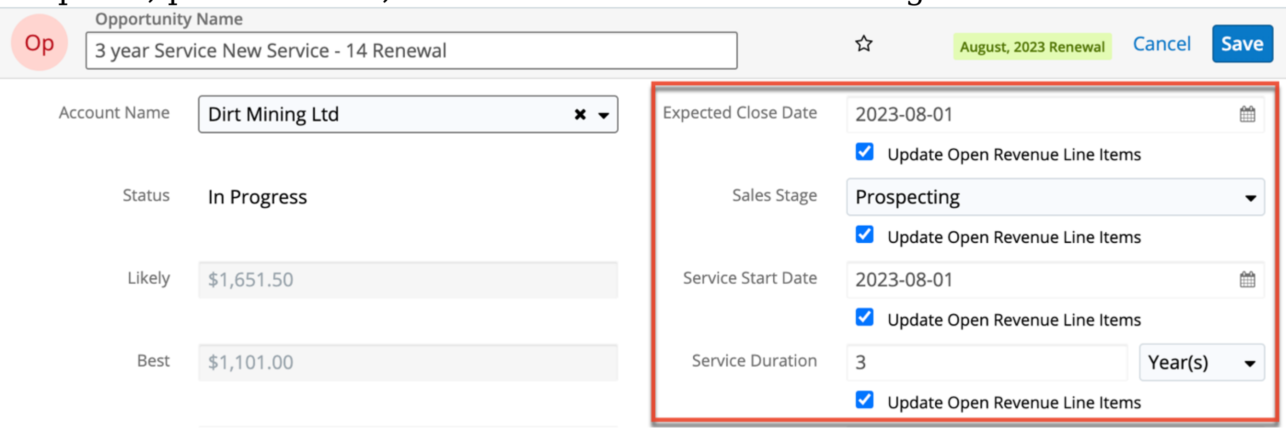
The Revenue Line Items subpanel allows the following operations during opportunity creation:

- Scroll horizontally within the subpanel to view all available revenue line item fields.
- Click the Plus button on the far right of the subpanel row to add additional revenue line items to the opportunity. The current Revenue Line Item row will be validated when adding a new row to ensure that all required fields and data are entered properly.
- To remove any revenue line items from the opportunity, simply click the Minus button to the left of the Plus button. Please note that you cannot remove the first revenue line item as at least one related revenue line item is required for the opportunity to save.

After saving the opportunity, the revenue line item(s) will appear in the Revenue Line Items subpanel beneath the opportunity record's fields in the record view.

Updating Cascading Fields via Opportunities Module

Five fields on the opportunity record have the ability to push values to the related revenue line item records' corresponding fields. The Forecast, Expected Close Date, Sales Stage, Service Start Date, and Service Duration fields all appear with an "Update Open Revenue Line Items" checkbox when editing the opportunity. The feature is available when editing the record via the opportunities list view, subpanel, preview view, or record view as well as during lead conversion.



Note: The cascading fields are read-only when initially creating an opportunity.

Deleting via Opportunities Module

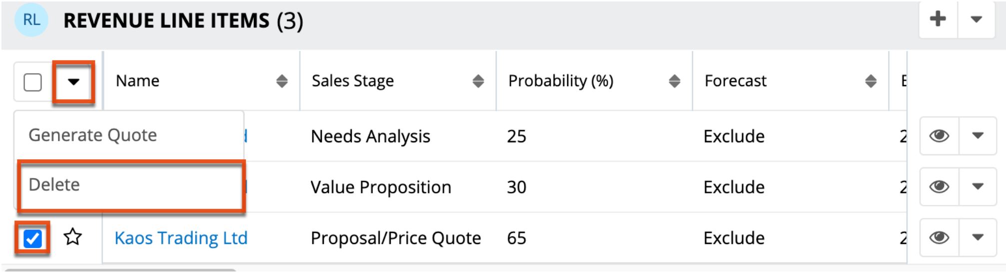
If a revenue line item is invalid or should no longer appear in your organization's Sugar instance, it may be deleted as long as its Status field is not set to "Closed Won" or "Closed Lost". For data integrity purposes, closed revenue line items may not be deleted. Deletion may be performed from either the Revenue Line Items detail view or list view, as described in the User Interface documentation. Revenue line items are unique in that they can also be deleted via the Revenue Line Items subpanel on the related opportunity's record view. Please note that deleting revenue line item 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.

Use the following steps to delete one or more revenue line item records via the Revenue Line Items subpanel on an opportunity record:

1. Navigate to an opportunity in record view.
2. Scroll to the Revenue Line Items subpanel in Data View below the

opportunity's fields.

3. Select the desired records then choose "Delete" from the Actions menu.



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

Importing Revenue Line Items

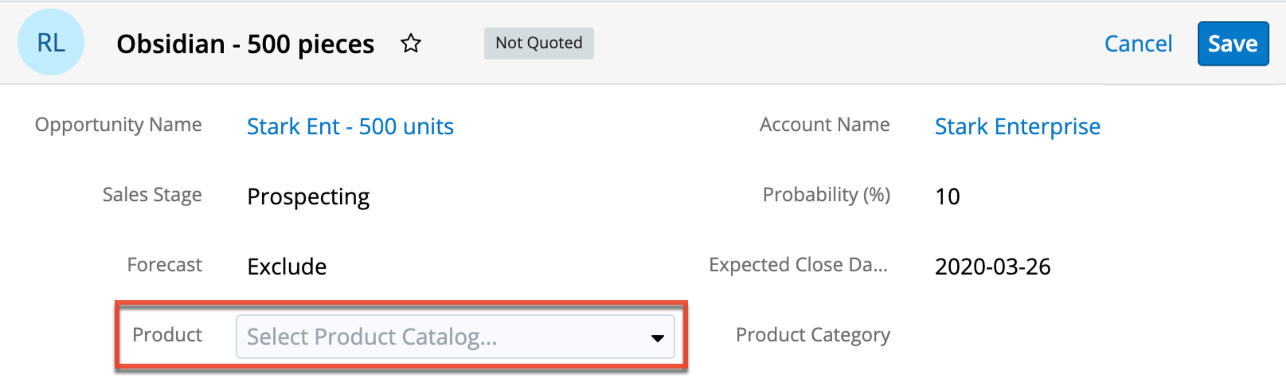
The import function allows you to push multiple revenue line items records into Sugar using a .csv file instead of creating them one-by-one. When an opportunity is imported into Sugar, at least one revenue line item must also be imported and related to the opportunity in order to populate the amounts (e.g., best, likely, etc.), Expected Close Date, Sales Stage, Service Start Date, and Service Duration fields on the opportunity record. When you are importing opportunity and revenue line items, please be sure to import your opportunities first, followed by your revenue line items. Each revenue line item row must include its parent opportunity's ID as well as values for its amount fields (i.e., Best, Likely, Worst). For more information on importing, please refer to the Import documentation.

Products and Revenue Line Items

Sugar's Product Catalog module contains a list of all products or services that your organization sells. This module provides the Revenue Line Items and Quoted Line Items modules with the template used when creating products to be used for Opportunities and Quotes, including pricing and cost information as well as information about the manufacturer. For more information, please refer to the Product Catalog documentation in the Application Guide.

Each revenue line item has the option to relate to an existing product from the product catalog via the Product field. By default, the Product field is filtered to display only product catalog records with a status of "Active". For more information on product status, please refer to the Product Catalog documentation in the Application Guide.

Please note that you can add revenue line items based on a product catalog item using your preferred currency instead of the product catalog item's currency by enabling the Create Revenue Line Items in Preferred Currency option in your user profile. If you choose to select a product from the product catalog, several fields will populate automatically to match the chosen product. For information on generating quotes from revenue line items, please refer to the Quotes and Revenue Line Items section of this page.



Purchases, Purchased Line Items, and Revenue Line Items

While revenue line items and opportunities represent the historical data captured during the sales cycle, the purchases and purchased line items represent the products or services your company has successfully sold to your accounts. When revenue line items, and their parent opportunity, reach the "Closed Won" stage of the sales cycle, related purchase and purchased line item records can be automatically generated and updated. For more information on how these modules work together, refer to the Purchases and Purchased Line Items page.

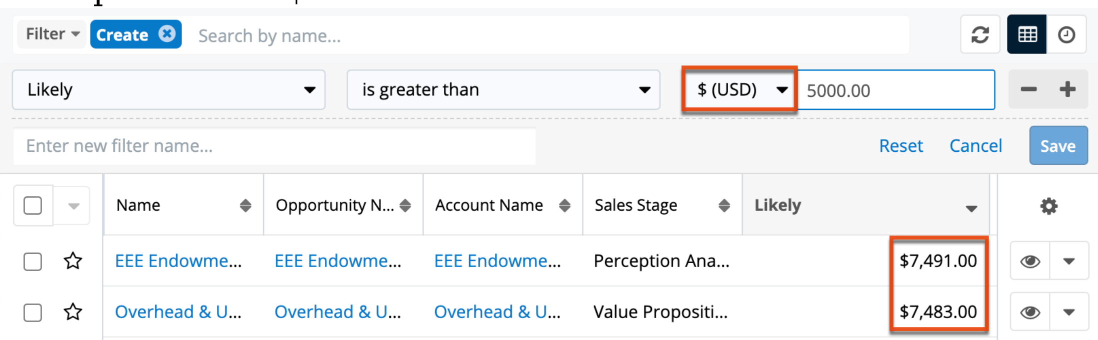
Currencies and Revenue Line Items

Sugar allows your organization to perform business around the world by supporting multiple currencies. Administrators must first add desired currencies and exchange rates to Sugar via Admin > Currencies. They also have the ability to set the instance's default currency via Admin > Locale. This is typically the currency of the country where the majority of business is conducted. For more information, please refer to the System documentation in the Administration Guide.

Users can specify their own preferred currency in their user profiles; records that the user creates will default to this currency. If they choose to also enable the Show Preferred Currency option in their profiles, currency fields throughout Sugar will display in their chosen currency. When a user enables the Create Revenue Line Items in Preferred Currency option, the user's preferred currency will be used when creating revenue line items based on a product catalog item, rather than the default behavior of using the product catalog item's currency. For more information, please refer to the Getting Started documentation. Finally, each revenue line item record has a Currency field where you will specify the currency being used for this particular business transaction

Filtering on Currency Fields

Currency fields are filtered according to the record's set currency rather than being standardized to the user's preferred or system default currency. In the list view, filtering revenue line items by a currency field allows you to specify the filter's currency. Only records matching both the chosen currency and amount range will be returned. For example, if you filter based on a Likely value that equals 500 in US Dollars, then the search result will return all line items with a Likely value of $500 but will exclude values of €500 or other currency values which are equivalent to $500.



Note: By contrast, when filtering values in the Reports module, any record matching the specified amount or range will be returned regardless of the record's currency. For example, if one revenue line item's Likely value is $500 in US Dollars and another's is €500 in Euros, filtering a report for a Likely value of exactly 500 will return both records in the report.

Updating Currency Rates

When saving a revenue line item 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 amounts 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 revenue line item provided the sales stage is not set to "Closed Won" or "Closed Lost". If the line item is in any other sales stage, the conversion rate will update under the following scenarios:

- The revenue line item 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 revenue line items saved with that currency to the new rate.

When the viewing user's profile has the Show Preferred Currency option selected, the converted amounts display in the user's preferred currency. In this case, the conversion rate used to calculate the converted amounts 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 line item's sales stage. For this reason, the converted amount fields should not be considered historically accurate for closed revenue line items 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 Getting Started documentation.

Emails and Revenue Line Items

Revenue line items may be related to emails by being selected in the email's Related To field. These relationships allow the revenue line item to display all relevant email correspondence in the Emails subpanel, as described below, and in the History dashlet on a revenue line item's record view.

Emails Subpanel

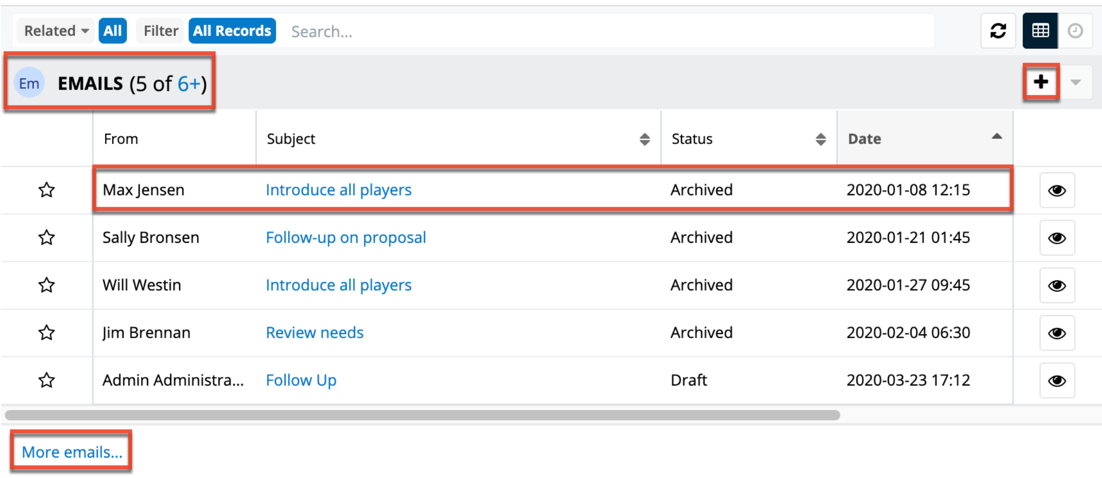
The Emails subpanel in the Revenue Line Items module displays emails that are related to the revenue line item record via the email's Related To field. These emails will also appear in the History dashlet on a revenue line item's record view.

The Emails subpanel allows the following functions to be performed:

- **Email Details**: To view the details of an email, click the subject to open it in detail view.
- **Record Count**: Subpanel headers display the total count of related records (e.g., "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g., "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- **Collapse or Expand**: Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.

- **Note**: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.

- **Column Widths**: Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- **Column Sort**: Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g., from ascending to descending).
- **Compose a New Email**: Click the Plus button on the upper right of a subpanel to create a new email with, by default, a relationship to the revenue line item you are currently viewing. The email will automatically select the revenue line item in the Related To field.
    - **Note**: Because creating a new related record opens a drawer on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- **More Records**: By default, Sugar displays up to five records in each subpanel, though administrators can alter the number via Admin > System Settings as described in the System documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g., "More emails...") at the bottom of the subpanel to load the next set of records.



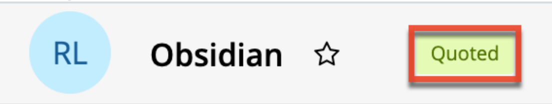
Quotes and Revenue Line Items

Quotes and opportunities both track sales throughout their lifecycle, but the two modules serve different purposes. Quotes allow you to communicate the details of a sale with customers while opportunities, with their revenue line item, allow you to forecast potential sales and the possible ranges of their dollar amounts. To aid in using both modules, Sugar allows you to generate a quote from a set of revenue line items as well as to use a quote to generate an opportunity and its set of revenue line items.

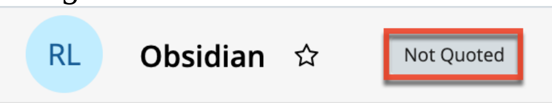
Generating Quotes From Revenue Line Items

Users may use one or more revenue line items to generate a new quote. Doing so copies all relevant information from the revenue line item(s) to the new quote's fields. The generated quote will be automatically linked to the revenue line item's parent opportunity and displayed in its Quotes subpanel.

After being used in a quote generation, the revenue line item will show a "Quoted" badge at the top of its record view.



Revenue line items that have not been included on a quote display a "Not Quoted" badge instead.

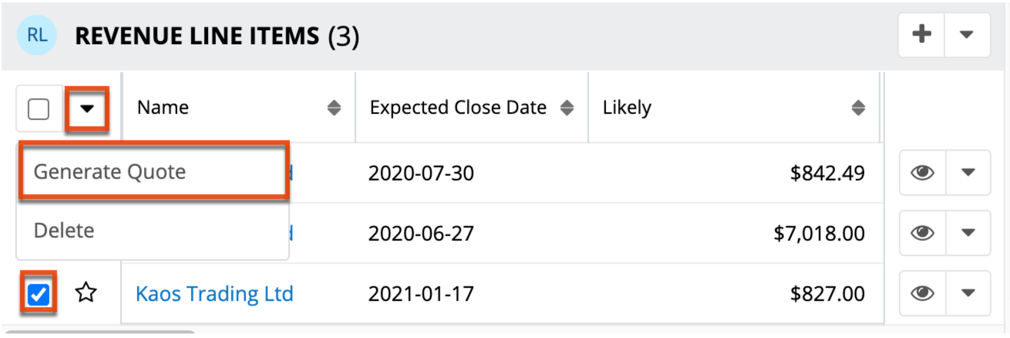


Generating a Quote via Subpanel

Users may also generate a quote from one or more revenue line items on an opportunity record.

Use the following steps to generate a quote via the Revenue Line Items subpanel on an opportunity record:

1. Navigate to an opportunity in record view.
2. Scroll to the Revenue Line Items subpanel in Data View below the opportunity's fields.
3. Select the checkboxes of the revenue line items you would like to include in the quote.
4. Choose "Generate Quote" from the Actions menu.



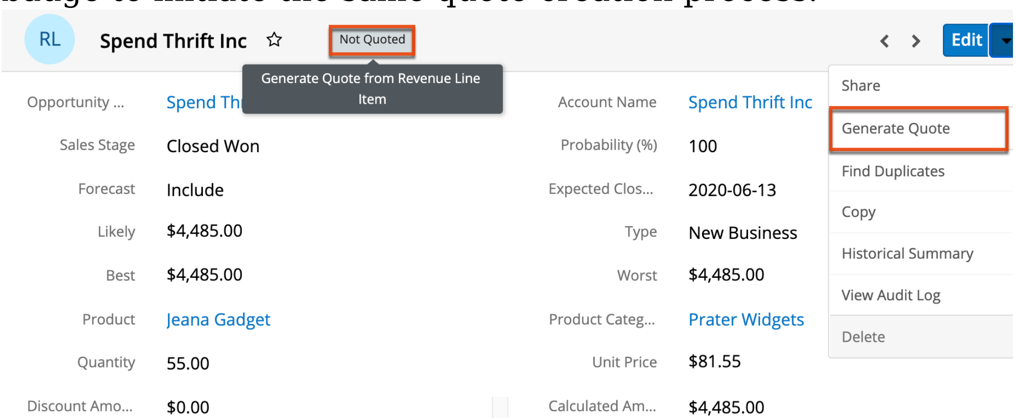
5. The quote record that opens in edit view will have all relevant fields and line items automatically populated from the revenue line item records. Make any necessary modifications, then click "Save" to preserve your changes.

Generating a Quote via Record View

Users may also generate a quote from a single revenue line item record from the Revenue Line Item record view.

Use the following steps to generate a quote via the Revenue Line Item's record view:

1. Navigate to an unquoted revenue line item's record view.
2. Select "Generate Quote" from the Actions menu or click the "Not Quoted" badge to initiate the same quote-creation process.

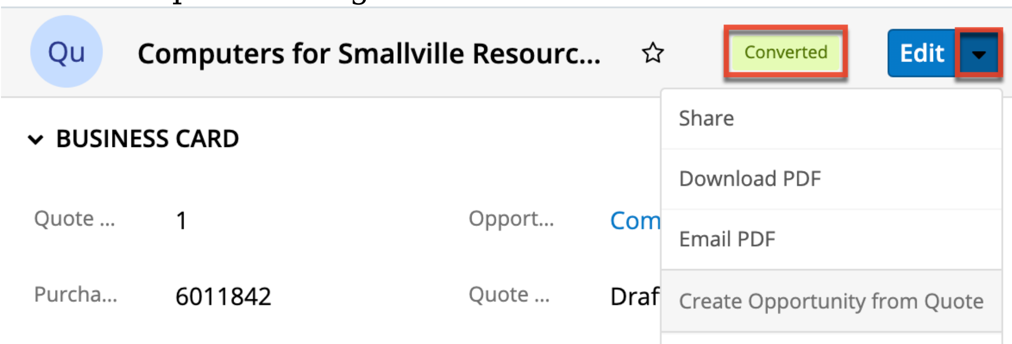


3. The quote record that opens in edit view will have all relevant fields and line items automatically populated from the revenue line item record. Make any necessary modifications, then click "Save" to preserve your changes.

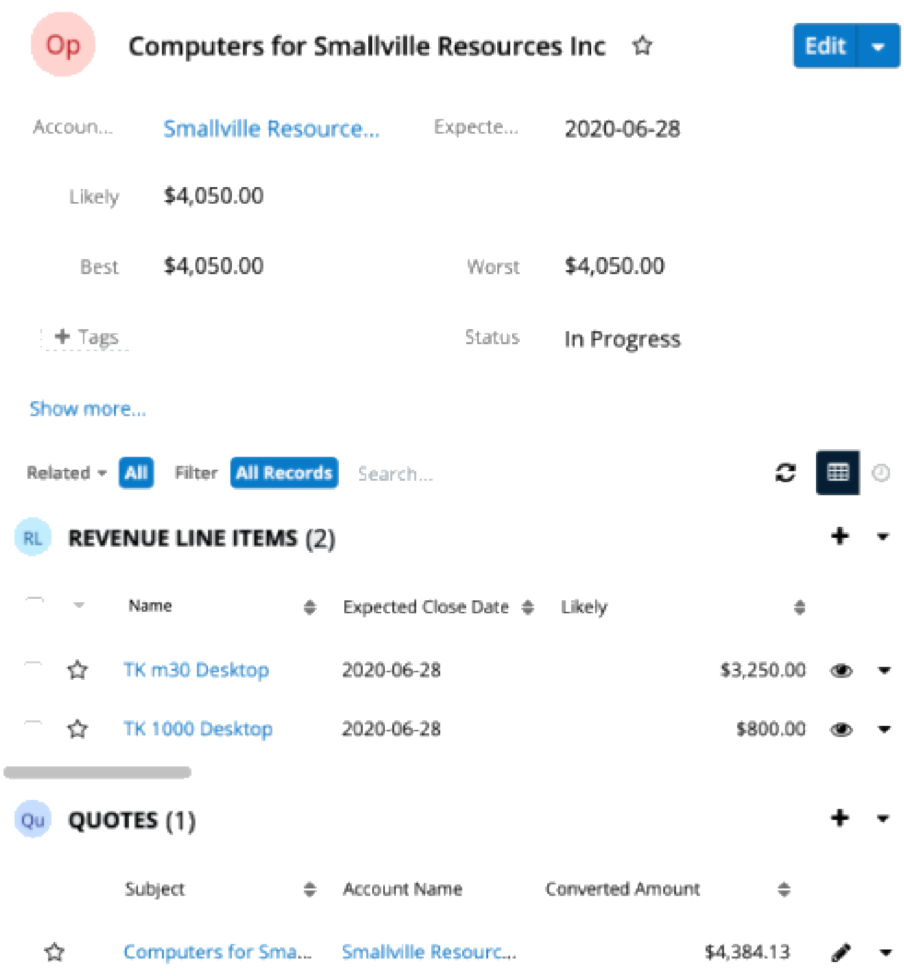
Generating Revenue Line Items From Quotes

To generate an opportunity including its set of revenue line items from a quote, choose "Create Opportunity from Quote" from the quote record's Actions menu.

Note: Quotes that are already "Converted" (as indicated by the badge adjacent to the quote's name in the example pictured here) cannot be re-converted into an opportunity. The "Create Opportunity from Quote" menu option will be grayed out when the quote's badge is Converted.



After selecting the Create Opportunity... option, you will be navigated to the newly created and saved opportunity, which will be pre-populated with the original quote's values in the Name, Account Name, Expected Close Date, Best, Likely, and Worst fields. In addition, the opportunity's Type will default to "New Business" and the Status to "In Progress".



The quoted line items related to the original quote will be copied to new revenue line items related to the new opportunity. By default, the Sales Stage values for these revenue line items are set to "Proposal/Price Quote", the Probability to "65%", and the Type to "New Business".

Because the probability defaults to 65%, the revenue line item will, by default, have a Forecast field value of "Exclude," meaning it will not be included in forecasts. You can edit the revenue line items and the opportunity record to modify any of these values as needed. The originating quote will be related to the new opportunity and can be found in the Quotes subpanel on the opportunity's record view. For more information on creating an opportunity from a quote, please refer to the Creating Opportunities from Quotes section of the Quotes documentation.

Tile View and Revenue Line Items

Instances that leverage the Revenue Line Items module will enjoy added benefits when using Tile View for opportunities. Dragging an opportunity from one column to another will update all of the opportunity's open revenue line items in one quick action. For more information, refer to the Tile View section in the Opportunities documentation.

Working With Sugar Modules

The Revenue Line Items module use Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

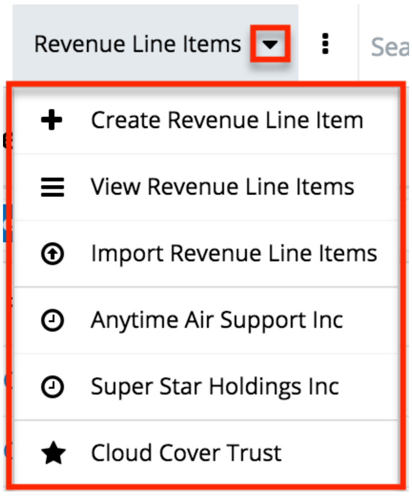
Revenue Line Item Menus

The Revenue Line Items module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with a link to more information about each option in the User Interface documentation or, for Revenue Line Items-specific functionality, within this page.

Module Tab Menus

The Revenue Line Items 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 with the remaining displayed modules 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 Revenue Line Items list view. You may also click the triangle in the Revenue Line Items 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 revenue line items you most recently viewed. The Favorites menu displays the list of revenue line items you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Revenue Line Item	Opens the record view layout to create a new revenue line item.
View Revenue Line Items	Opens the list view layout to search and display revenue line items.
Import Revenue Line Items	Opens the import wizard to create or update revenue line items using external data.

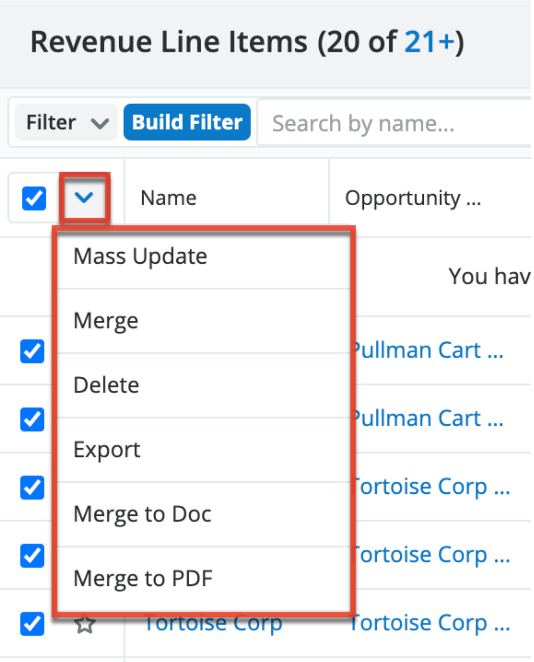
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Revenue Line Items list view displays all revenue line item records and allows for searching and filtering to locate specific revenue line items. You can view the basic details of each record within the field columns of the list view or click a revenue line item's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual revenue line item records or click the checkbox in the list header to select all records displayed on the current set of list view results.



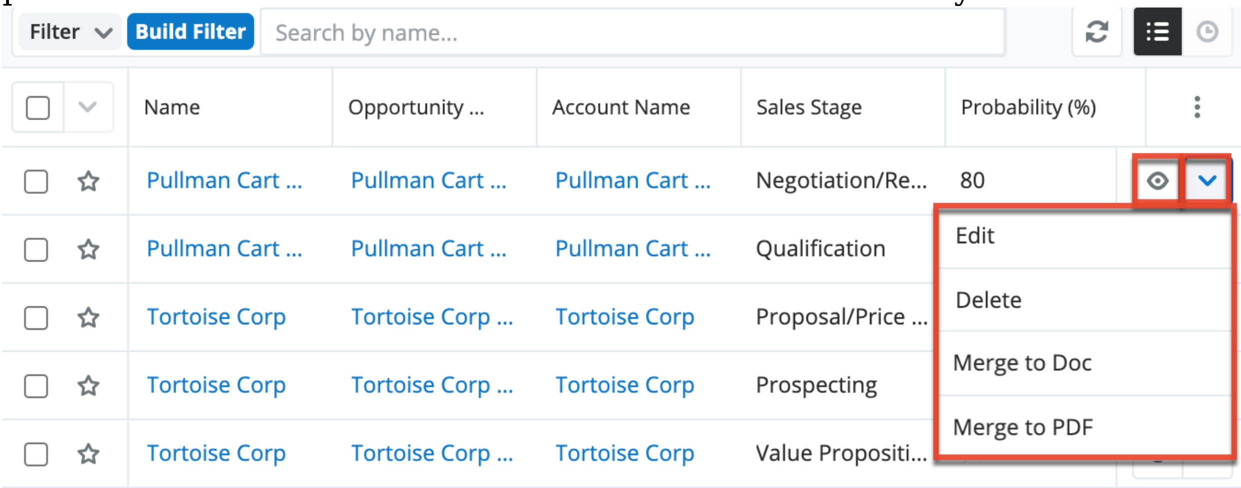
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more revenue line items at a time.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Merge	Merge two or more duplicate revenue line items.
Delete	Delete one or more revenue line items at a time.
Export	Export one or more revenue line items to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the

	Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual revenue line item directly from the list view.

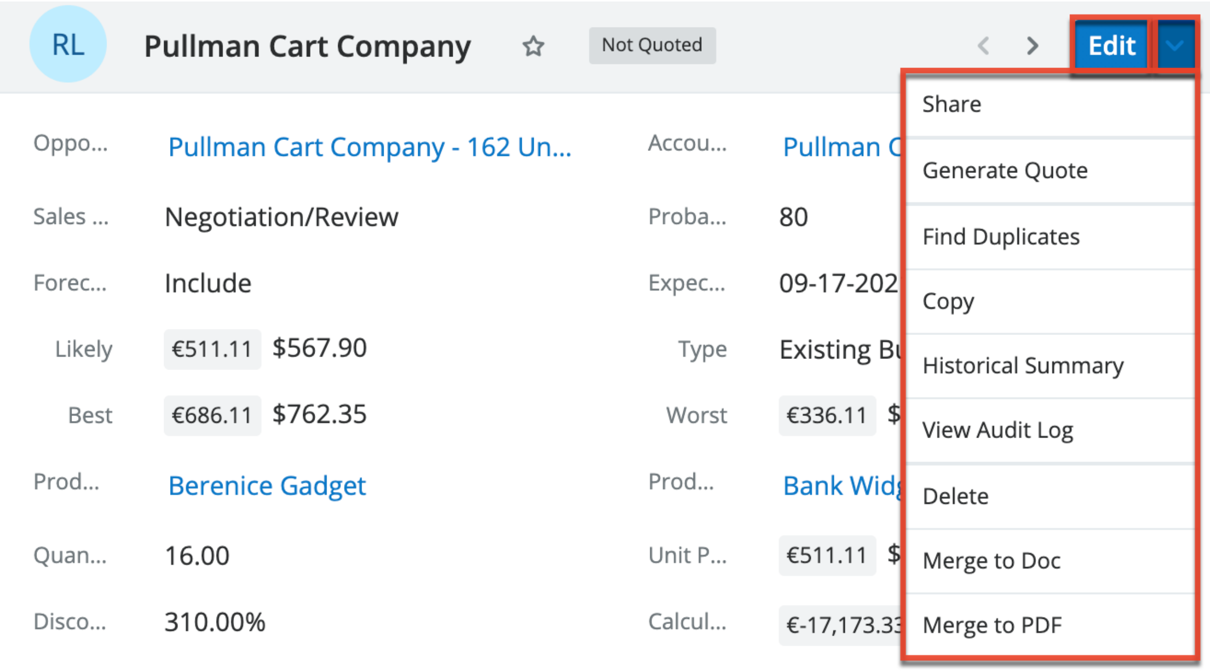


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this revenue line item in the intelligence pane.
Edit	Edit this revenue line item.
Follow	(Available if Activity Streams are enabled) Follow changes to this revenue line item in your activity stream.
Delete	Delete this revenue line item.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Revenue Line Items record view displays a single revenue line item in full detail including its fields, subpanels of related records, and activity stream. To access a revenue line item's record view, simply click a hyperlinked revenue line item name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this revenue line item.
Share	Share a link to this revenue line item via email. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Download PDF	Download the record's information as a PDF file. • This menu option is only visible if the administrator has created a PDF template for the Revenue Line Items module via Admin > PDF Manager.

	• Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.
Email PDF	Email the record's information as a PDF attachment. • This menu option is only visible if the administrator has created a PDF template for the Revenue Line Items module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Generate Quote	Generate a quote based on this revenue line item.
Find Duplicates	Locate potential duplicates of this revenue line item.
Copy	Duplicate this revenue line item to create a new revenue line item.
Historical Summary	View a historical summary of activities (e.g., calls, meetings, etc.) related to this revenue line item.
View Audit Log	View a record of changes to this revenue line item.
Delete	Delete this revenue line item.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules.

Content Link	Description
Creating Revenue Line Items Basic Revenue Line Item Creation Creating via Quick Create Creating via Subpanels Creating via Duplication Importing Revenue Line Items	The Creating Records section covers the various methods of creating new revenue line item records, including via the Create button in the Revenue Line Items module, the Quick Create menu on the upper right of every Sugar page, via the Revenue Line Items subpanel on related modules, duplication of an existing revenue line item record, and importing a list of revenue line items into Sugar using a .csv spreadsheet.
Viewing Revenue Line Items Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Activity Streams Viewing via Preview Viewing via Reports	The Viewing Records section describes the various methods of viewing revenue line item records, including via the Revenue Line Items list view and record view, the Recently Viewed menu in the Revenue Line Items module tab, activity stream entries concerning revenue line item updates or where a user mentions a revenue line item, previewing revenue line items in the right-hand side panel, and reports displaying revenue line item data.
Searching for Revenue Line Items Global Search List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to the two searching methods for locating revenue line items: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Revenue Line Items module.
Revenue Line Items List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu	The List View section walks through the many elements of the Revenue Line Items List View layout which contains a filterable list of all revenue line item records in Sugar. While the generic menu options are described in the User

Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview Record Actions Menu More Revenue Line Items Activity Stream Dashboards	Interface sections linked to the left, the options specifically available in the Revenue Line Items list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.
Revenue Line Items Record View Favorite Designation Following Designation Next or Previous Record Actions Menu Show More Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Activity Stream Dashboards	The Record View section walks through the many elements of the Revenue Line Items Record View layout which contains detailed information about a single revenue line item record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Revenue Line Items record view are described in the Record View Actions Menu section of this page.
Editing Revenue Line Items Editing Inline via Record View Editing via Record View Editing Inline via Subpanels Editing Inline via List View Mass Editing via List View	The Editing Records section describes the various methods of editing existing revenue line item records, including inline via the Revenue Line Items record view, in full edit mode on the record view, inline via the Revenue Line Items subpanel on related module records, inline via the Revenue Line Items list view, and via the Mass Update option on the list view.
Deleting Revenue Line Items Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted revenue line items, including via the Revenue Line Items record view, an individual record's Actions menu on the Revenue Line Items list view, and the Mass Actions menu on the list view. **Note**: A revenue line item may be deleted only if its Status field is not set to "Closed Won" or "Closed Lost". For data integrity purposes, closed revenue line items may not be deleted.

Exporting Revenue Line Items	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of revenue line items and all their data as a .csv file for use outside of Sugar (e.g., in Microsoft Excel).
Recalculating Calculated Values	The Recalculating Calculated Values section provides instructions on utilizing the Recalculate Values list view option to update calculated field values in the module if the administrator has changed the field's formula via Admin > Studio.
Finding Duplicate Revenue Line Items	The Finding Duplicate Records section provides instructions for locating duplicate revenue line item records. If searching on matching fields (e.g., Name) identifies one or more duplicates, they can be merged into a single record.
Merging Revenue Line Items Merging via List View	The Merging Records section provides instructions for merging duplicate revenue line items which will combine field values and related records into a single revenue line item.
Viewing Revenue Line Item Historical Summaries	The Viewing Record Historical Summaries section describes the Historical Summary record view option which displays quick details of the revenue line item record's related calls, meetings, emails, notes, and tasks.
Viewing Revenue Line Item Audit Logs	The Viewing Record Audit Logs section describes the View Audit Log record view option which displays a history of changes to the revenue line item's audited fields.
Revenue Line Item PDFs Downloading Revenue Line Item PDFs Emailing Revenue Line Item PDFs	The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of revenue line item information as configured by an administrator via Admin > PDF Manager.
Favoriting Revenue Line Items	The Favoriting Records section

Favoriting via List View Favoriting via Record View Favoriting via Subpanel	describes the various methods of marking revenue line items as favorites, including via the Revenue Line Items list view, Revenue Line Items record view, or any Revenue Line Items subpanel appearing on the record view of a related module. Favoriting a revenue line item allows you to easily access it from list views, dashlets, or the Revenue Line Items module tab.
Following Revenue Line Items Following via List View Following via Record View	The Following Records section describes the various methods of marking revenue line items as "Following", including via the Revenue Line Items list view and record view. Following a revenue line item causes its activity stream updates to be included on your Home page and Revenue Line Items list view activity streams so that you can easily keep up with changes and user posts on the record.
Sharing Revenue Line Items	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the revenue line item record. If the recipient is logged into Sugar, clicking the link will bring them directly to the revenue line item's record view.

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Purchases and Purchased Line Items

Overview

Sugar's Purchases and Purchased Line Items modules consist of purchase records and purchased line item records, respectively, that represent the products or services you sell to clients. The data in these modules provide a historically accurate and time-aware picture of the status and worth of your accounts.

There are various ways you can create purchases and purchased line items in Sugar. As a Sugar Sell user, purchases and purchased line items can be automatically generated when working with the Opportunities and Revenue Line Items modules. As a Sugar Serve or Sell user, purchases and purchased line items can be manually created within the modules and leveraged from within the account record view to provide information on the product(s) you support. This documentation covers the basics of the Purchases and Purchased Line Items modules as well as the various options available in performing actions related to the modules.

For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting purchase records, please refer to the Working With Sugar Modules section of this page.

Please note that you will only be able to see purchase and purchased line item records as allowed by your license type, team membership, assigned roles, and user access type. For more information, please refer to the referenced documentation in the Administration Guide.

Purchases and Purchased Line Items

Sugar's Purchases and Purchased Line Items modules are designed to give you an accurate and succinct picture of what, how much, and when your accounts have purchased from you. Each purchase record acts as a bucket, with each bucket representing a single product or service that an account has purchased. The purchased line item records that fill each bucket represent every time the account has purchased that particular product or service. As a Sugar Sell or Serve user, purchases and purchased line items may be created manually. Additionally, as a Sugar Sell user on a Sugar instance using the Opportunities with Revenue Line Items model, records that meet certain criteria can trigger the automatic generation of purchase and purchased line item records.

Ultimately, the purchase and purchased line item records will provide:

- Revenue accuracy, either manually or with your ERP sync, without corrupting historical opportunity data
- A flexible anchor point for license keys, contractual details, and other information needed post-sale
- Building blocks for a time-aware analysis of customer worth and product performance
- Historically accurate product or service details, per account, for customer support to reference

Purchased Line Items Subpanel

The Purchased Line Items subpanel is accessible within the Purchase record view and contains every record of sale in relation to the account and the product or service. Every purchase should have one or more related purchased line items, and each purchased line item must belong to a purchase.

Note: The related purchased line items in the subpanel determine the value for certain Purchase fields (e.g., Start Date, End Date, etc.). For more information please refer to the Rules of Inheritance section of this document.

Purchase Fields

The Purchases module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The following definitions are suggested meanings for the fields, but some fields can be leveraged differently to meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove some fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration Guide.

Fields identified as Inherited in the following table may have inherited values. For more information, please refer to the Purchase Fields: Rules of Inheritance section of this page.

Field Name	Description	Inherited	Calculated
Account Name	The account to which the purchase belongs.	□	
Assigned to	The Sugar user assigned to the purchase.	□	
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible		

	to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.		
Date Created	The date the purchase record was created in Sugar.		
Date Modified	The date the purchase record was last modified in Sugar.		
Description	A description or other information about the purchase.		
End Date	The date the purchase activity ends.	□	□
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.		
Product	The product associated with the purchase record.	□	
Product Category	The product category associated with the purchase record.	□	

Product Type	The product type associated with the purchase record.	□	
Purchased Line Item Count	A calculated field that represents the number of purchased line item records related to the purchase **Note**: This field is not on the layout by default.		□
Renewable	Indicates if the purchase can be renewed.	□	
Service	Indicates if the purchase is considered a service.	□	
Start Date	The date the purchase activity starts.	□	□
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating and using tags, please refer to the Tags documentation.		
Teams	The Sugar team(s) assigned to the purchase record.	□	
Total Revenue	A calculated field that represents the combined total of all related purchased line items' Calculated		□

	Revenue fields.		
Total Quantity	A calculated field that represents the combined total of all related purchased line items' Quantity field.		✓

Purchase Fields: Rules of Inheritance

When a purchase record is initially created automatically, the following fields inherit from the revenue line item:

- Purchase Name
- Account Name
- Assigned to
- Teams
- Start Date (subsequent updates will be inherited from the purchased line item)
    - **For services**: Earliest "Start Date" of the purchased line items
    - **For non-services**: Earliest "Close Date" of the purchased line items
- End Date (subsequent updates will be inherited from the purchased line item)
    - **For services**: Latest "End Date" of the purchased line items
    - **For non-services**: Latest "Close Date" of the purchased line items
- Product
- Product Category
- Product Type
- Renewable
- Service

Note: If a purchase record is automatically created based on an opportunity with two or more revenue line items with the same product, the fields will inherit from the revenue line item with the earliest "Date Created" value.

When a purchase is created manually, the following fields inherit from its product, if any, and its purchased line items:

- **Start Date**:
    - **For services**: Earliest "Start Date" of the purchased line items
    - **For non-services**: Earliest "Close Date" of the purchased line items
- **End Date**:

- **For services**: Latest "End Date" of the purchased line items
- **For non-services**: Latest "Close Date" of the purchased line items

- **Product Category**: Inherits from the purchase's product, if any, and becomes read-only
- **Product Type**: Inherits from the purchase's product, if any, and becomes read-only
- **Renewable**: Inherits from the purchase's product, if any
- **Service**: Inherits from the purchase's product, if any, and becomes read-only

Purchased Line Item Fields

The Purchased Line Items module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The following definitions are suggested meanings for the fields, but some fields can be leveraged differently to meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove some fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration Guide.

Fields identified as Inherited in the following table may have inherited values. For more information, please refer to the Purchased Line Item Fields: Rules of Inheritance section of this page. For more information on calculated fields, please refer to the Calculated Purchase Line Item Fields section of this page.

Field Name	**Description**	Inherited	Calculated
Account	The account to which the purchased line item belongs.	□	
Annual Revenue	A calculated field which represents a 1 year's worth of revenue.		□
Assigned to	The Sugar user assigned to the purchased line item record.	□	
Calculated Revenue	A calculated field that reflects the worth of the purchased line	□	□

	item.		
Close Date	The date the sale occurred.	□	
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.		
Date Created	The date the purchased line item record was created in Sugar.		
Date Modified	The date the purchased line item record was last modified in Sugar.		
Description	A description or other information about the purchased line item record.		
Discount	The amount or percentage that the total cost is reduced by.	□	
End Date	The date the service activity ends.	□	
Integration Sync ID	The sync key field used by external		

	integrations to identify Sugar records in the external application. See the [Integrate REST API endpoints](#) in the Developer Guide for more details on how to use this field.		
Parent Revenue Line Item	The revenue line item that generated the purchased line item record.	□	
Product	The product associated with the purchased line item record.	□	
Purchase	The purchase record associated with the purchased line item record.	□	
Quantity	The number of products the customer is purchasing.	□	
Renewable	Indicates if the purchased line item record can be renewed.	□	
Renewal	A read-only checkbox indicating the record is a renewal. In Sugar Sell, this field is automatically set during renewal generation when a renewable service line item is "Closed Won".	□	

Renewal Opportunity	The related renewal opportunity; automatically set during pipeline automation and purchase generation of a product marked as renewable service. **Note:** This field's value is only visible to Sugar Sell users; when this field appears on layouts, users without a supported license type will see a placeholder containing the text "License Required" instead of the field's value. See the [User Management](#) page for more details on license types.		
Revenue	The actual amount received for the purchase.		
Service	Indicates if the purchased line item record is considered a service.	✓	
Service Duration	The length of time of the service.	✓	
Start Date	The date the purchase activity starts.	✓	
Status	An indication if the purchased line item is a past, active, or future purchase or		✓

	service. **Note**: Process Time-Aware Schedules must be active and cron must be enabled in your Sugar instance to trigger the automatic update of records. All production instances hosted on SugarCloud servers have cron enabled by default. For more information, refer to the Introduction to Cron Jobs help article.		
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.		
Teams	The Sugar team(s) assigned to the purchased line item record.	□	
Unit Price	The amount per unit the product costs.	□	

Purchased Line Item Fields: Rules of Inheritance

When a purchased line item record is created automatically, the following fields inherit from the related revenue line item:

- Purchased Line Item Name
- Account
- Assigned to
- Teams
- Parent Revenue Line Item
- Close Date
- Start date
    - **For services**: Start Date of the revenue line item
    - **For non-services**: Close Date of the revenue line item
- End Date
    - **For services**: End Date of the revenue line item
    - **For non-services**: Close Date of the revenue line item
- Product
- Renewable
- Renewal
- Service
- Service Duration
- Discount
- Unit Price
- Quantity
- Calculated Revenue
- Purchase

Note: When created automatically, the Purchase field is populated based on the appropriate Account and Product that is associated with the "Closed Won" revenue line item.

When the purchased line item is created manually, it must be associated with a purchase record. Once selected, the following fields inherit from the purchase:

- **Account**: Inherits from the Account Name on the purchase record
- **Purchased Line Item Name**: Inherits from the product, if one is selected from the Product Catalog on the purchase record
- **Product**: Inherits if a product is chosen from the Product Catalog on the purchase record
- **Service Duration**: Inherits from the product, if a product is chosen from the Product Catalog on the purchase record
- **Unit Price**: Inherits from the product, if a product is chosen from the Product Catalog on the purchase record
- **Renewable**: Inherits from the purchase record
- **Service**: Inherits from the purchase record

Calculated Purchased Line Item Fields

The Calculated Revenue, Annual Revenue, and Status fields on the purchased line item record are read-only, calculated fields. The table and sections below illustrate how these calculated fields use various other field values to generate their results.

Purchased Line Item	**Quantity**	**Unit Price**	**Discount**	**Service Duration**	**Start Date**	**End Date**	**Calculated Revenue**	**Annual Revenue**	**Status**
Purchased Line Item A	100	$75.00	5%	2 year	1/1/2019	12/31/2021	$7,125.00	$3,562.50	Active
Purchased Line Item B	50	$250.00	$500.00	6 months	7/1/2018	12/31/2018	$12,000.00	$24,000.00	Past

Calculated Revenue

The Calculated Revenue field is equal to the quantity value multiplied by the unit price multiplied by the service duration less the discount. Service line items that are related to a product catalog record will calculate the service duration amount to be used in the formula by dividing the line item duration by the default product catalog record's duration. For example, a customer is purchasing a service for one year instead of the default three-year duration. Depending on which discount type is selected (e.g., % Percent or $ US Dollars), the following calculations occur:

Non-service line items or service line items not related to a product catalog record:

- Calculated Revenue = (Quantity x Unit Price) x (1 - % Discount)
- Calculated Revenue = (Quantity x Unit Price) - $ Discount

Service line items related to a product catalog record:

- Calculated Revenue = (Quantity x Unit Price x (Line Item Duration / Default Duration)) x (1 - % Discount)
- Calculated Revenue = (Quantity x Unit Price x (Line Item Duration / Default Duration)) - $ Discount

Note: For more information on using different currencies within Sugar, please refer to the System documentation in the Administration Guide.

Annual Revenue

When the purchase is a service, the Annual Revenue is equal to the Calculated Revenue divided by the Service Duration, multiplied by the time period. Depending on the time period selected (e.g., Year(s), Month(s), or Day(s)) the following calculations occur:

- Annual Revenue = Calculated Revenue / Service Duration (# years)
- Annual Revenue = Calculated Revenue / Service Duration (# months) x 12
- Annual Revenue = Calculated Revenue / Service Duration (# days) x 365

When the purchase is not a service, the Annual Revenue field is equal to the Calculated Revenue amount.

Status

The Status field calculates its value (Past, Active, or Future) using the current date compared to the Start and End date values.

When a purchase is not a service, two options exist and are calculated with ifElse sugar logic:

- **Past**: If today's date is on or after the Start Date/End Date then the status is "Past".
- **Future**: If today's date is before the Start Date/End Date then the status is "Future".

A third option exists for service line items:

- **Active**: If today's date is equal to the Start Date, End Date, or falls between the two dates, then the status is "Active".

Creating Purchases and Purchased Line Items

There are various ways you can create purchases and purchased line items in Sugar. As a Sugar Sell user, purchases and purchased line items can be automatically generated when working with the Opportunities and Revenue Line Items modules. As a Sugar Serve user, purchases and purchased line items can be manually created within the modules and leveraged from within the Accounts record view to provide information on the product(s) they have purchased. For more information on manually creating records in Sugar, refer to the User Interface documentation.

The following sections cover in detail how purchases and purchased line items can be automatically generated by Sugar Sell users, manually created by Sugar Serve or Sugar Sell users, or imported.

Automatically Generating Purchases and Purchased Line Items

The Opportunities and Revenue Line Items modules provide robust support for the motions of selling and provide a historically accurate picture of the sales stages in the customer lifecycle. The Purchases and Purchased Line Items modules pick up where others leave off in order to support the crucial downstream operations of order processing, support, renewal, and analytics. The Opportunities/Revenue Line Items and Purchases/Purchased Line Items modules work together to bridge that gap, creating a flow from managing the items you intend to sell your customers to creating and maintaining a home for the products or services that have reached the "Closed Won" stage of the sales cycle.

When an opportunity with renewable revenue line items is set to "Closed Won", kicking off pipeline renewal automation, the newly created purchased line item and renewal opportunity records automatically relate via the Renewal Opportunity field. This relationship supports additional functionality for coterminous add ons.

Note: The automatic generation of purchases and purchased line items is only available in Sugar instances configured with the Opportunities with Revenue Line Items model.

Criteria for Automatic Generation

Purchases and purchased line items are automatically created when an opportunity's Sales Stage changes to "Closed Won"; however, the automatic generation only occurs for revenue line items that meet the following criteria:

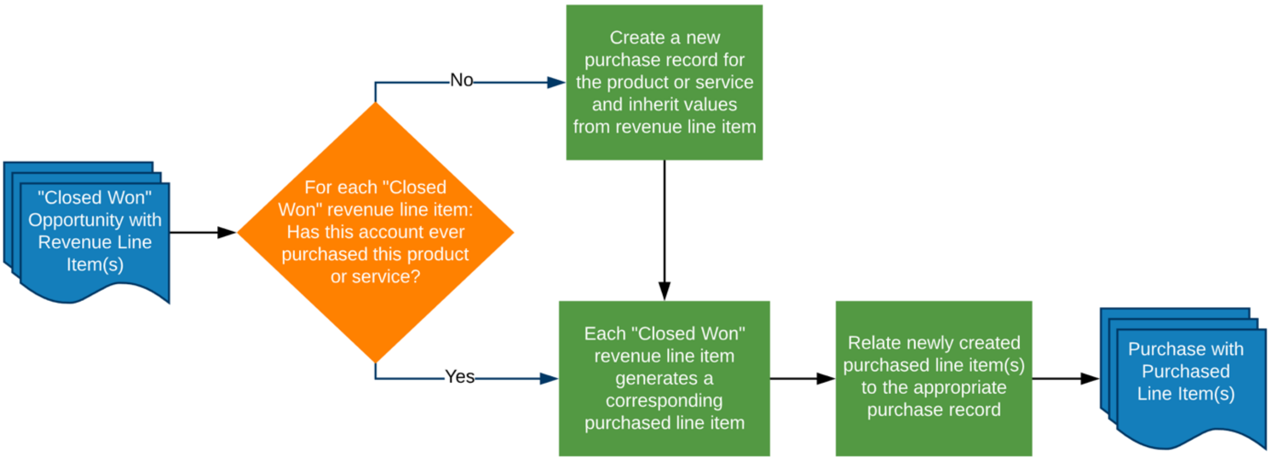
- The revenue line item's Sales Stage is "Closed Won"
- The revenue line item's Generate Purchase dropdown is "Yes"

In addition, cron must be enabled in your Sugar instance to trigger the automatic generation of records. All production Sugar Sell instances, which are hosted on SugarCloud servers, have cron enabled by default. For more information, refer to the Introduction to Cron Jobs Help Article.

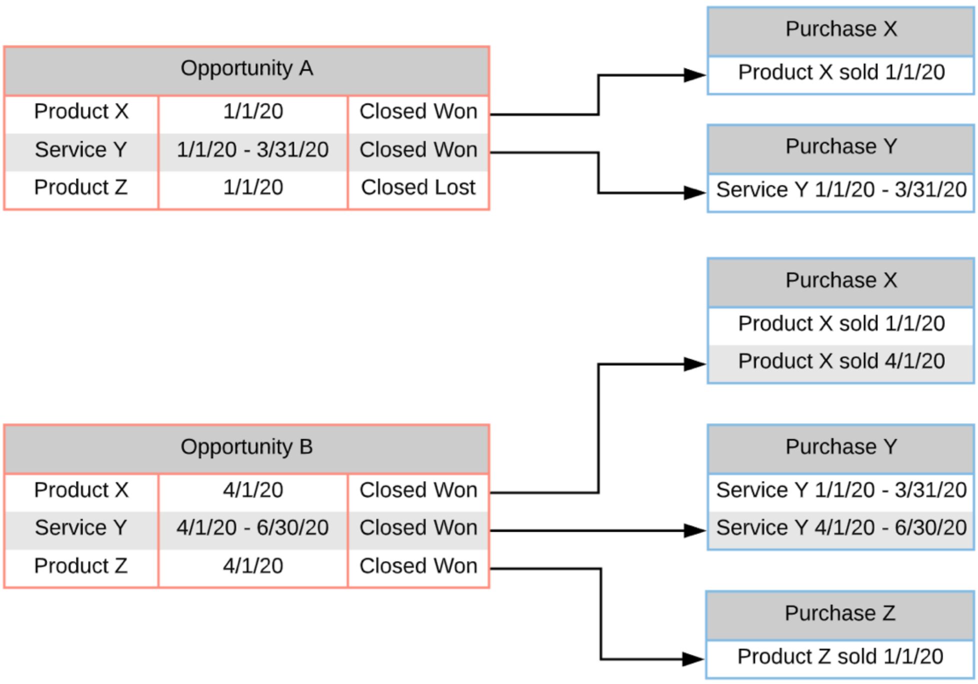
Note: The Generate Purchase field has a default value of "Yes" and is not available on the revenue line item record view by default. An admin user may choose to add the field to the layout and can do so from Studio.

Automatic Generation Process

The following flowchart illustrates the steps that occur automatically when an opportunity's Sales Stage changes to "Closed Won". Purchase data is only generated for revenue line items that meet the [Criteria for Automatic Generation](#).

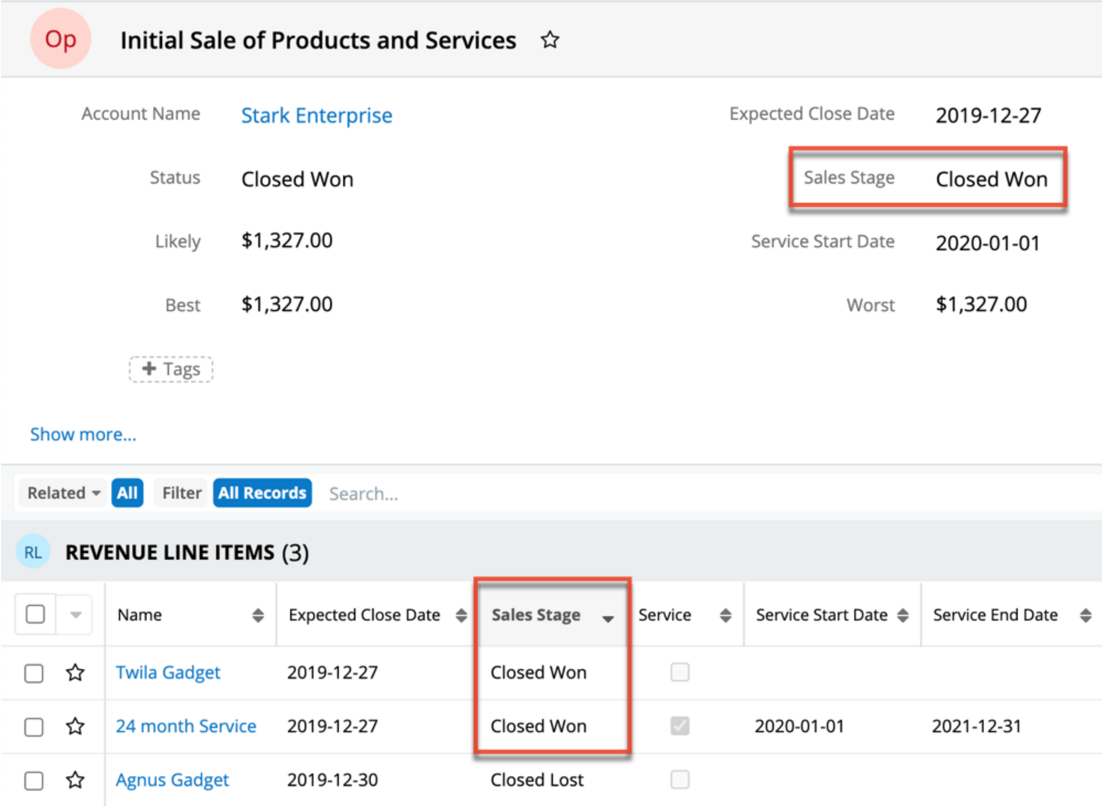


The following Entity Relationship Diagram illustrates how two "Closed Won" opportunities with revenue line items for an account will relate to the purchases and purchased line item records.

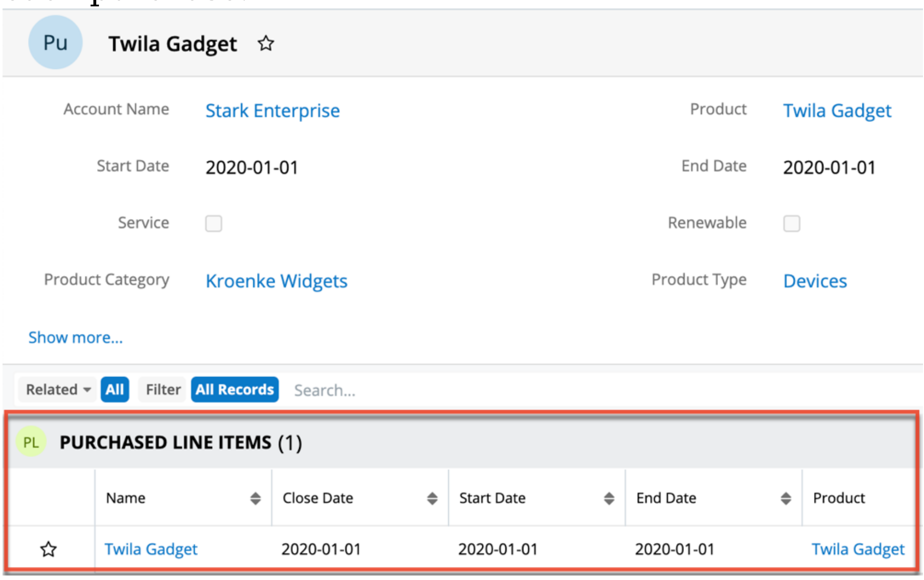


The following example illustrates what occurs when an opportunity with revenue line items reaches a "Closed Won" stage and the products or services associated with the line items have never been sold to the account before. In other words, we are following the above workflow when the answer to the decision element is "No".

First, the sales stage of an opportunity with at least one revenue line item changes to "Closed Won". We are assuming the Generate Purchase checkbox, hidden from view by default, is "Yes".



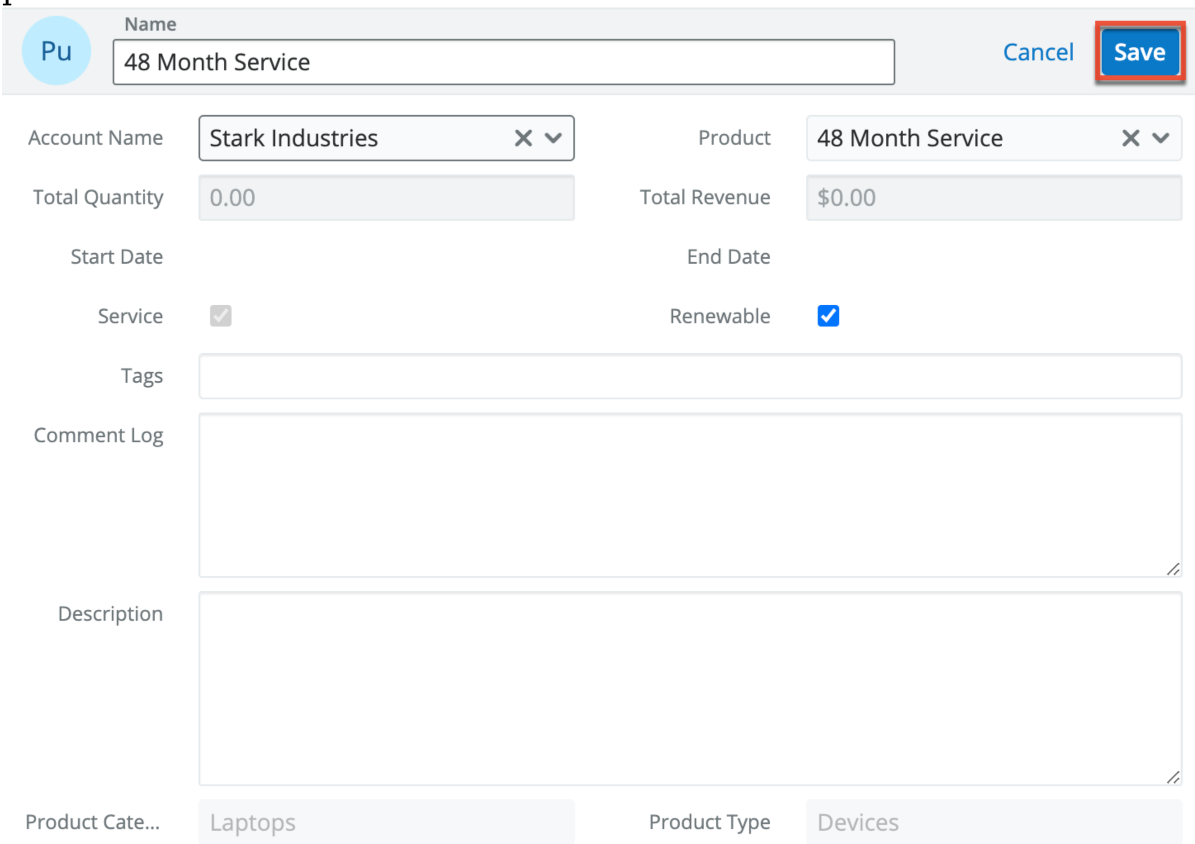
Then, from the two "Closed Won" revenue line items, two new purchase records are created, one for each product. In this example, the two products are "Twila Gadget" and "24 month Service". In addition, purchased line items are created for each purchase.



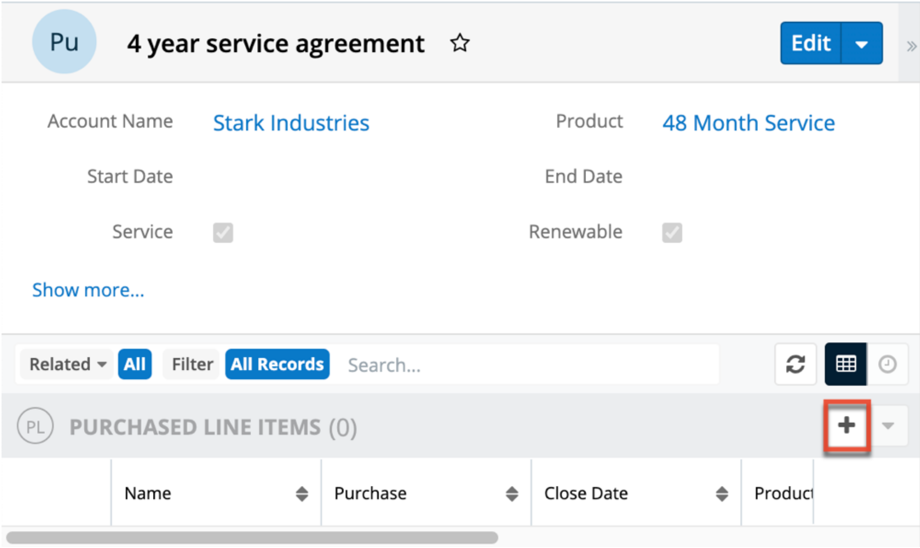
Note: Default layouts have been modified for this example to show relevant information in a more compact and reader-friendly way.

Manually Creating Purchases and Purchased Line Items

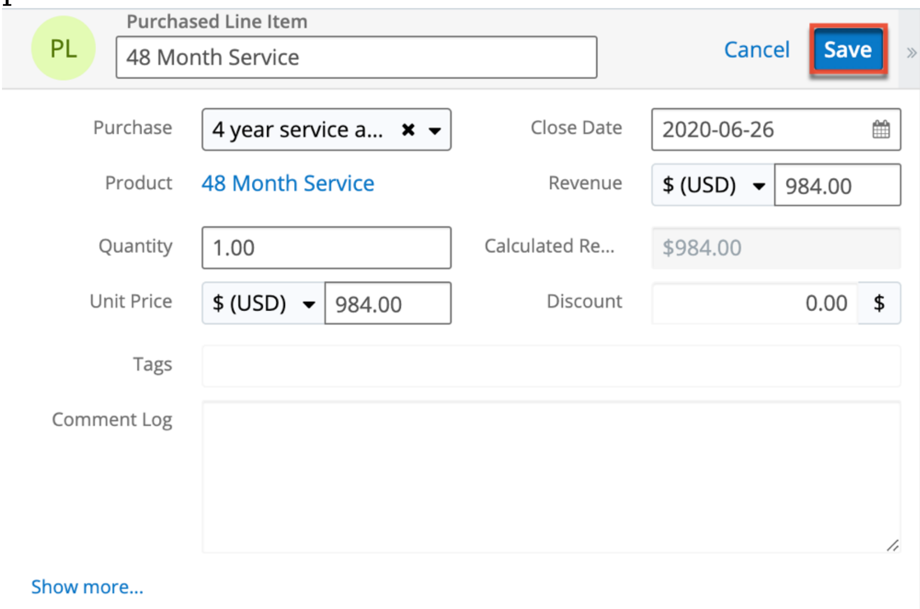
As a Sugar Sell or Serve user, purchases and purchased line items can be manually created within the Purchases module, Purchased Line Items module, or Purchased Line Items subpanel. Because a purchased line item must be related to a purchase, you will need to create the purchase record first. The records can be leveraged from within the Accounts record view to provide information on the product(s) they have purchased. The following steps outline an example of how to create a purchase and related purchased line item records manually:

1. Select "Create Purchase" from the Purchases Module Tab Menu or click the Create button from the list view and fill in values for the purchase. Some fields may inherit values based on your input. Click "Save" to create the purchase.


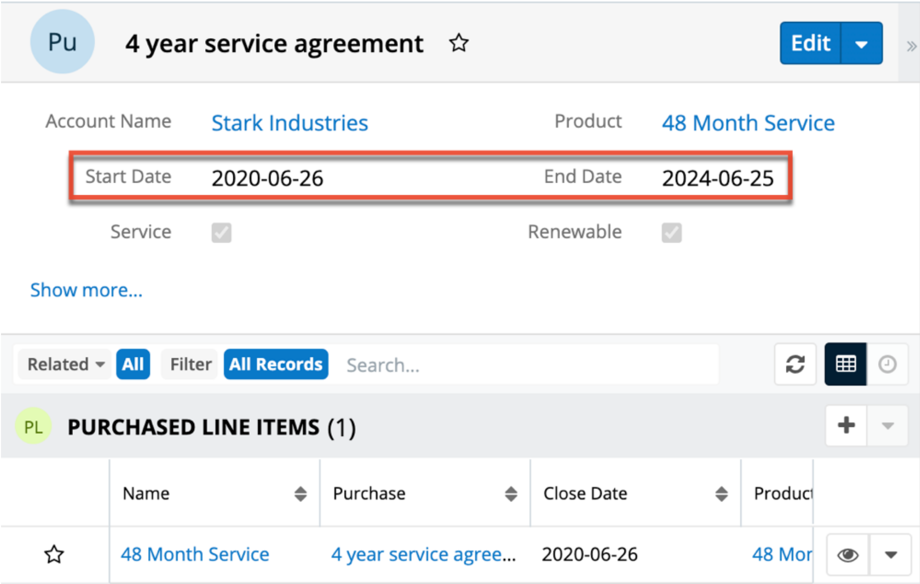
2. Click the Plus button within the Purchased Line Items subpanel of the newly created purchase record to open the create drawer:



3. Fill in your desired values. Some [fields may inherit](#) values based on your purchase record. Click "Save":



After saving, the Start Date and End Date fields will be populated based on the values in the related purchased line item record(s):



Importing Purchases and Purchased Line Items

The import function allows you to insert multiple purchase records into Sugar using a .csv file instead of creating them one-by-one. When you are importing purchases and purchased line items, please be sure to import your purchases first, followed by your purchased line items. Each purchased line item row must include its parent purchase's ID as well as values for its amount fields (i.e., Unit Price, Revenue). For more information on importing, please refer to the Import documentation.

Accounts, Purchases, and Purchased Line Items

When working with account records in Sugar, you can see related purchases in the Purchases subpanel, the Purchased Line Items subpanel, the Active Subscriptions dashlet, and the Purchase History dashlet.

Purchases Subpanel

The Purchases subpanel is accessible within the Account record view and contains every product or service the account has purchased from your organization.

Purchased Line Items Subpanel

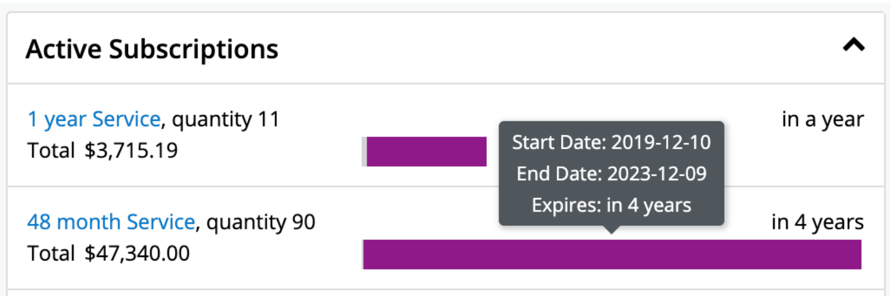
The Purchased Line Items subpanel is accessible within the Account record view and contains every individual record of the products or services the account has purchased from your organization.

Active Subscriptions Dashlet

The Active Subscriptions dashlet is available by default in the Renewals Console and can be added to the record view dashboard of any module, custom or stock, that has one of the following:

- A one-to-one or many-to-one relationship to the Accounts module
- A relate field targeting the Accounts module

The dashlet shows a list of all of the current account's purchases that are marked "Service", have a start date in the past, and an end date in the future. The dashlet shows each purchase's name, quantity of units, and calculated revenue line item amount next to "Total". A simple bar chart visualizes the time elapsed and time remaining for the subscription, which you can explicitly view by hovering your mouse over the bar. For more information, please review the Dashboards and Dashlets section of the User Interface documentation.



Purchase History Dashlet

The Purchase History dashlet is available to add to the Renewals Console and can be added to the record view dashboard of any module, custom or stock, that has one of the following:

- A one-to-one or many-to-one relationship to the Accounts module
- A relate field targeting the Accounts module

The dashlet shows a list of all the current account's purchases regardless of the start or end date of the purchase record. The dashlet shows each purchase's name, date range, quantity, and total. For more information, please review the Dashboards and Dashlets documentation.

Opportunities, Purchases, and Purchased Line Items

Sugar's Opportunities module allows you to track individual sales and their line items from start to finish. The opportunity record reflects the amount and expected close date of its revenue line items and usually progresses through the same sales stages until it is marked either "Closed Won" or "Closed Lost". When an opportunity reaches a sales stage of "Closed Won" and its related revenue line items meet the necessary criteria, this will trigger the automatic generation of purchase and purchased line item records.

Note: The automatic generation of purchases and purchased line items is only available in Sugar instances configured with the Opportunities with Revenue Line Items model.

Revenue Line Items, Purchases, and Purchased Line Items

Sugar's Revenue Line Items module consists of individual line items of potential business that are included on an opportunity record and tracked through the sales lifecycle. Each revenue line item is the prospective sale of a particular product and includes relevant sale data. Each revenue line item will typically progress through several sales stages until it is marked either "Closed Won" or "Closed Lost". This allows for greater granularity when working with opportunities and forecasting since each line item within an opportunity can have its own sales stage and may be related to different products from your Product Catalog. When a revenue line item record meets the necessary criteria, this will trigger the automatic generation of purchase and purchased line item records.

Note: For more information about how opportunities and revenue line items interact, please refer to the Opportunities and Revenue Line Items section of the Revenue Line Items documentation.

Add-On Revenue Line Items Subpanel

Purchased line items may be related to multiple revenue line items when a purchased line item is marked as a "Service". Service line items offer the chance of adding potential business, represented as a revenue line item, on to the existing purchase line item record. For more information refer to the Coterminous Add-Ons section.

Coterminous Add-Ons

After the sale of a service has been finalized, there may often be a need to make adjustments (e.g., adding licensed users) for the remainder of the service period, without affecting the service end date. Sugar streamlines the ability to add products and services on to an existing purchased line item record to support coterminous add-ons. Additionally, if the service is renewable, Sugar supports the ability to automatically update the renewal opportunity and revenue line item related to the original purchase. The following sections walk through:

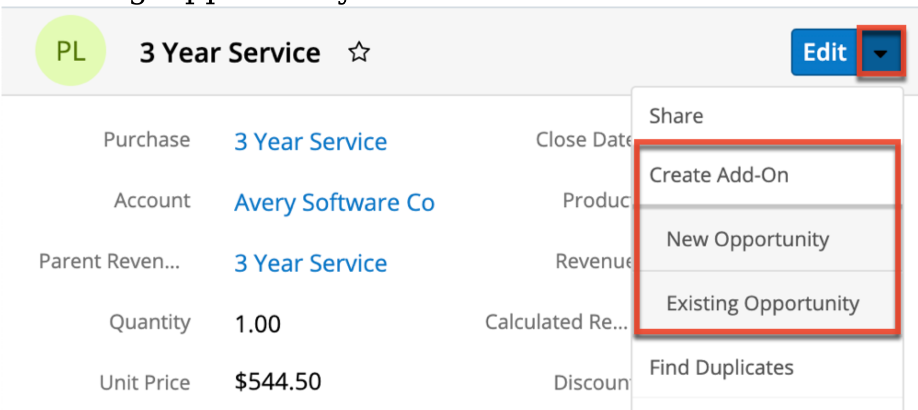
- Creating the add-on
- Updating the renewal

Note: The option to create an add-on is only available to purchased line items marked as a "Service".

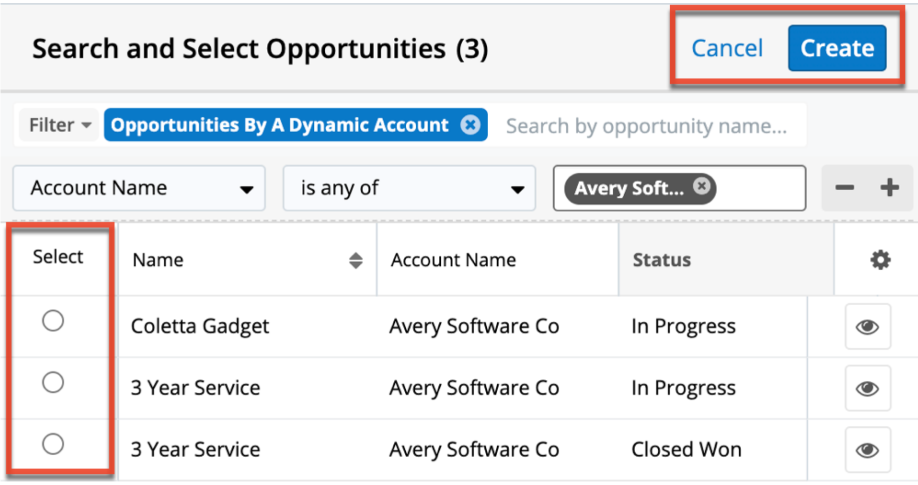
Creating the Add-On

Coterminous add-ons can be created from the Add On To field on the Revenue Line Item record view. However, the recommended method is using the Create Add-On menu item from the purchased line item record. The following example walks through the process of adding a new revenue line item from an existing purchased line item:

1. Navigate to the purchased line item record representing the service the customer has already bought.
2. Click the record view Actions menu > click "Create Add-On" menu > click "Existing Opportunity".

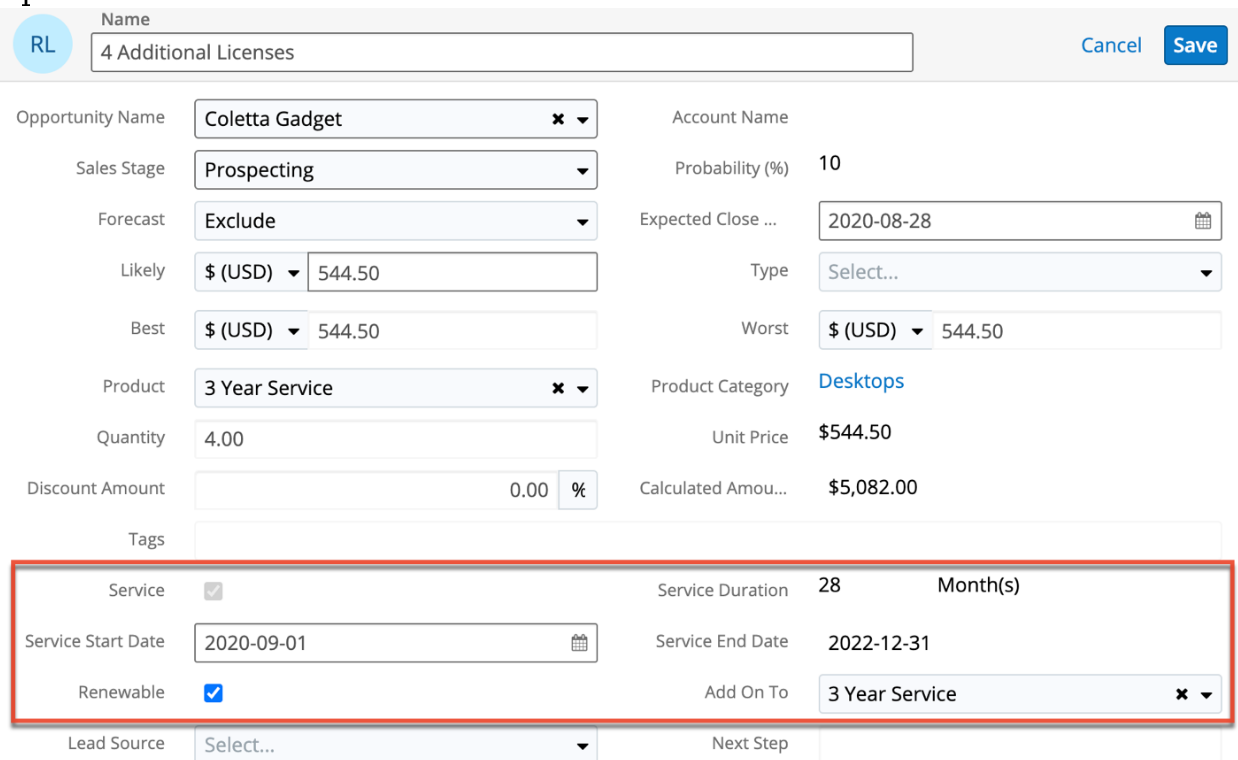


   Note: Choosing "New Opportunity" will jump-start the creation of a brand new opportunity and revenue line item.
3. Select an existing opportunity from the Search and Select drawer's filtered list of the current account's related opportunity records.

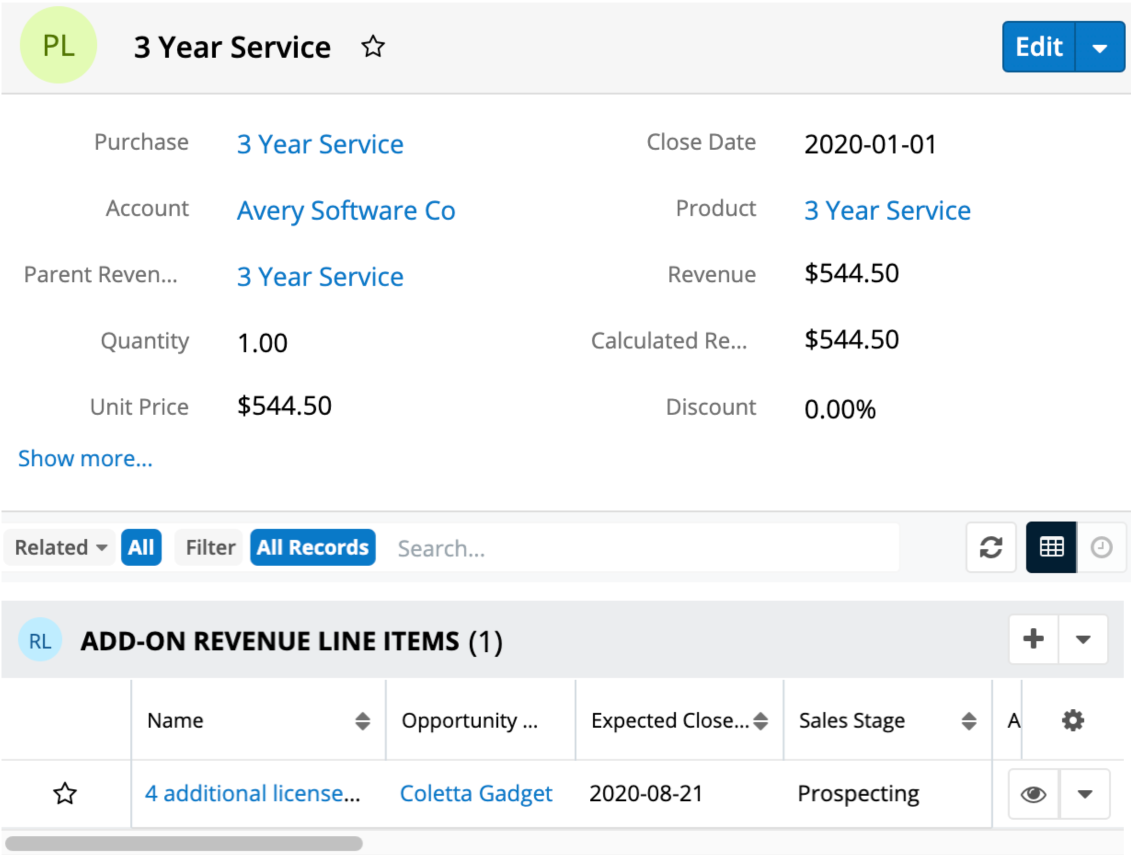


Note: You also have the option to create a new opportunity with a revenue line item or cancel from this screen.

4. The revenue line item's Service End Date value is locked to the end date of the related purchased line item, while still allowing the user to change the product, start date, quantity, etc. The duration automatically updates based on the service start date selected by the user. If the service is renewable, it likely has a related renewal opportunity and revenue line item. The Renewable checkbox must be checked here in order to automatically update the related renewal revenue line item.



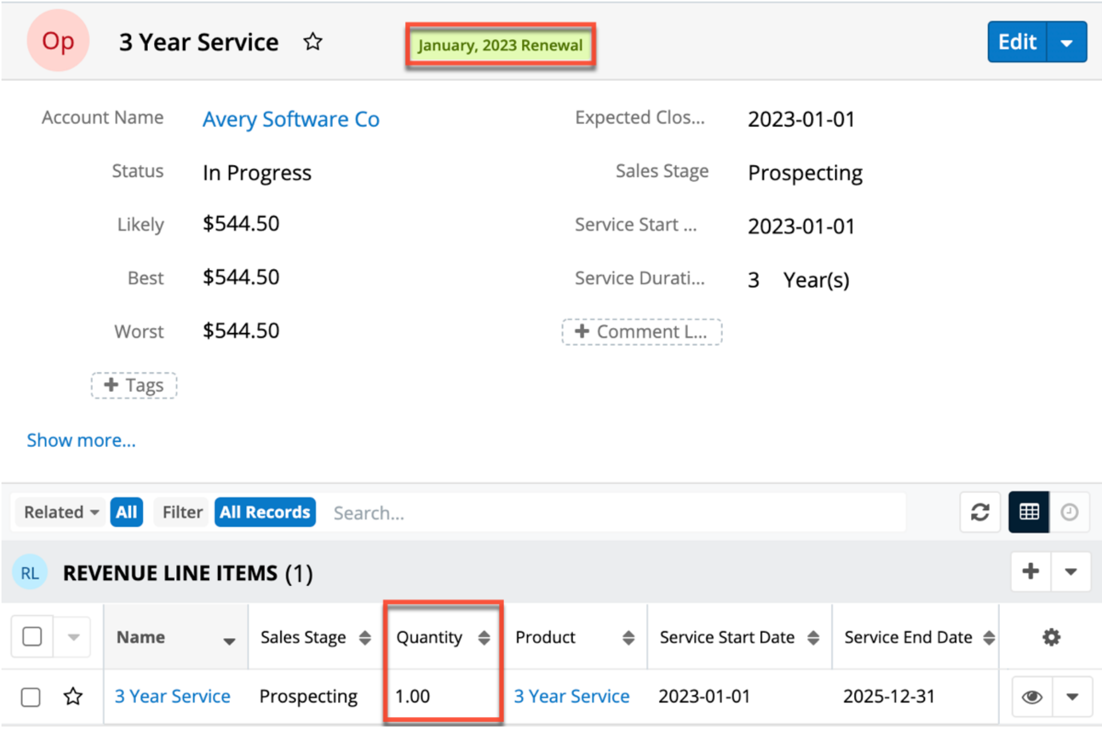
5. After saving the revenue line item, you are returned to the purchased line item record and can see the Add-On Revenue Line Items subpanel with the newly created record.



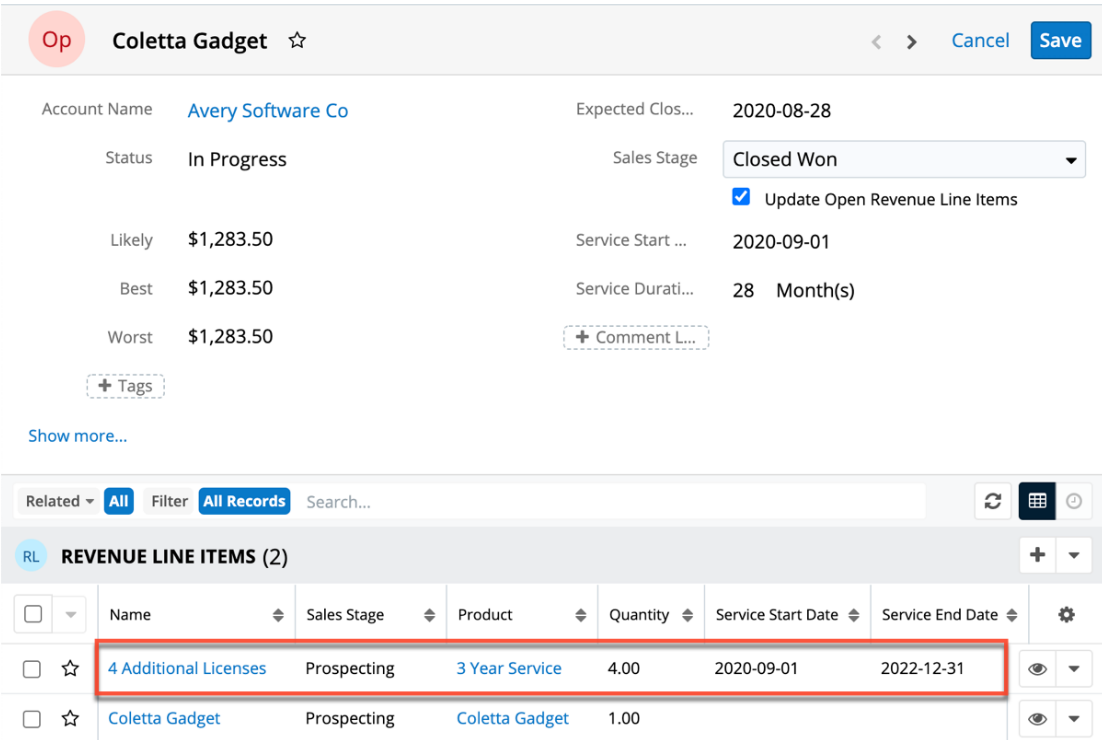
Updating the Renewal

After the add-on revenue line item has been created, and if it was marked as renewable, it will be able to update the related renewal opportunity and revenue line item after being "Closed Won". For more information on pipeline renewal automation functionality, please refer to the Services and Renewable Revenue Line Items documentation in the Application Guide. The following steps build off the above example to show you how to complete the sales cycle on the coterminous add-on in order to update the renewal:

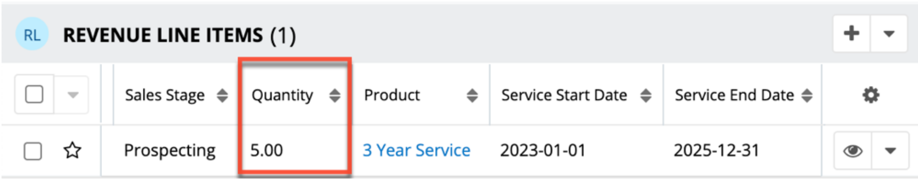
1. Navigate to the renewal opportunity that is related to the original purchase and note the quantity.



2. Navigate to the coterminous opportunity and revenue line item created in the steps in the section above. When appropriate, set the opportunity and relevant revenue line items to "Closed Won".



3. Navigate, again, to the renewal opportunity that is related to the original purchase and note the quantity has been updated automatically.



Note: If the product catalog record related to the opportunity was modified after the renewal opportunity and revenue line item were created, the add-on revenue line item record will be shown as a second line item in the renewal opportunity.

Emails and Purchases

Purchases may be related to emails by being selected in the email's Related To field. These relationships allow the purchase to display all relevant email correspondence in the Emails subpanel and History dashlet on a purchase's record view. A purchase's Emails subpanel and History dashlet may also display emails belonging to the contacts related to the purchase.

Emails Subpanel

The Emails subpanel in the Purchases module displays emails that are associated with the purchase record in a variety of ways:

- **Related to the purchase**: If the purchase is selected in the email's Related To field, the email and purchase are explicitly related, and the email will appear in the purchase's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the Emails documentation.
- **Related to the purchase's related contacts**: If the email is related, either explicitly or implicitly, to a contact record that is related to the purchase, the email will appear in the purchase's Emails subpanel and History dashlet.
    - **Note**: Administrators can enable or disable a purchase from displaying related contact's emails via Admin > Related Contacts Emails. For more information, please refer to the Email documentation in the Administration Guide.

For more information on working with subpanels, please refer to the User Interface documentation.

Working With Sugar Modules

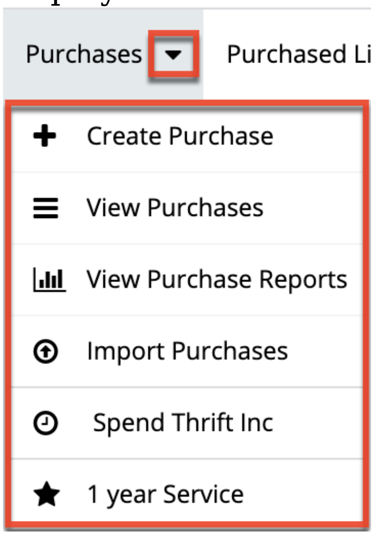
The Purchases and Purchased Line Items modules use Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Purchases and Purchased Line Item Menus

The Purchases and Purchased Line Items modules contain various options and functionality that are available via menus in the module tab, list view, and record view. The following sections present each menu type, using the Purchases module as an example, and its options with links to more information about each option in the User Interface documentation.

Module Tab Menu

The module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the module list view. You may also click the triangle in the module tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu displays options for creating and viewing records. The Recently Viewed menu displays the list of records you last visited. The Favorites menu displays the list of records you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Purchase	Opens the record view layout to create a new purchase.
View Purchases	Opens the list view layout to search and

	display purchases.
View Purchases Reports	Directs you to the Reports list view filtered to display only reports based on the Purchases module.
Import Purchases	Opens the import wizard to create or update purchases using external data.

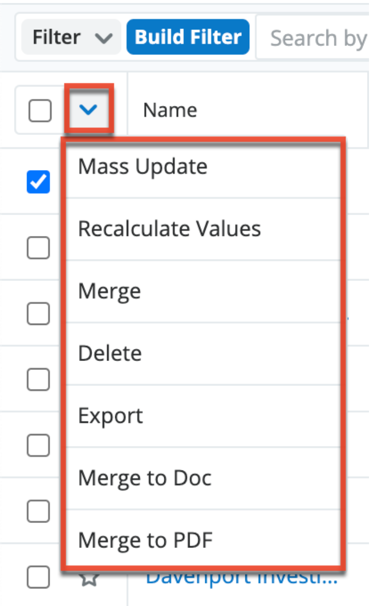
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Purchases list view displays all purchase records and allows for searching and filtering to locate specific purchases. You can view the basic details of each record within the field columns of the list view or click on a purchase's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual purchase records or click the checkbox in the list header to select all records displayed on the current set of list view results.

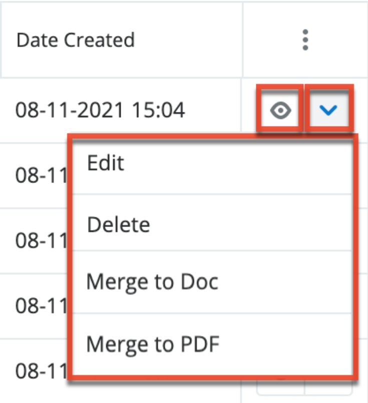


The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more purchases at a time.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Merge	Merge two or more duplicate purchases.
Delete	Delete one or more purchases at a time.
Export	Export one or more purchases to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on a purchase directly from the list view.



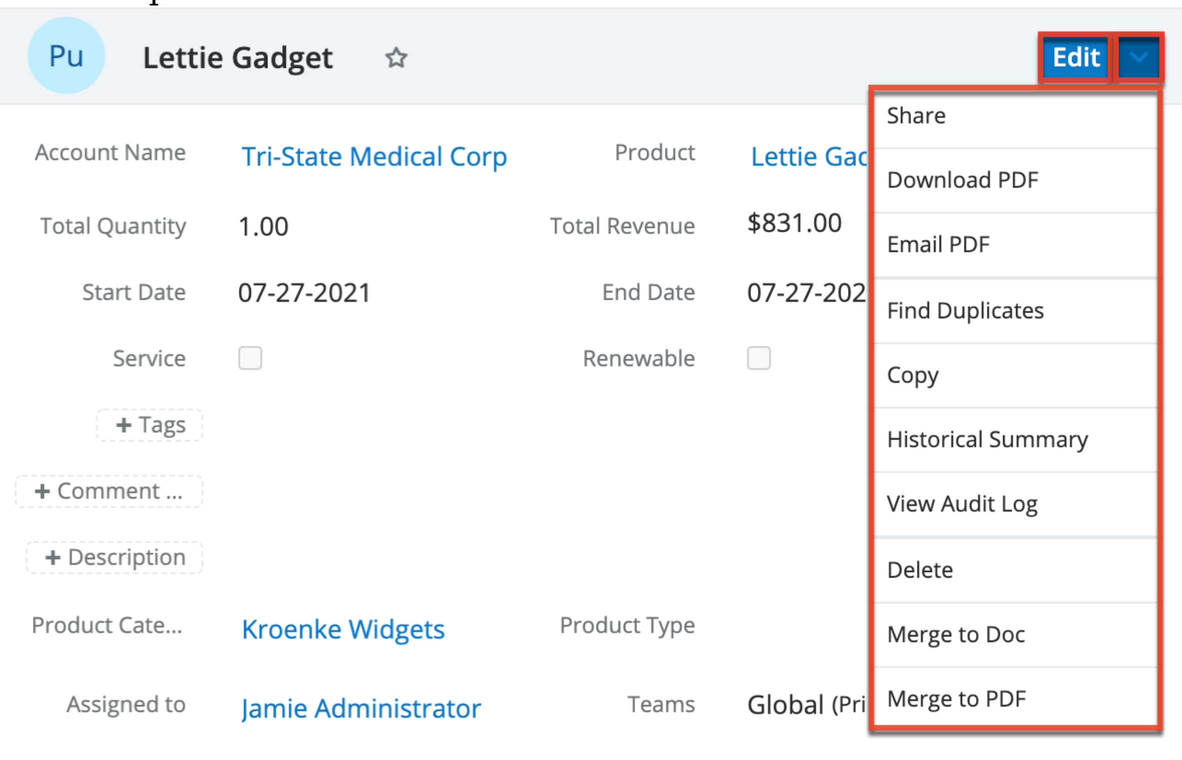
The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description

Preview (Eye icon)	Preview this purchase in the intelligence pane.
Edit	Edit this purchase.
Follow	(Available if Activity Streams are enabled) Follow changes to this contact in your activity stream.
Delete	Delete this purchase.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Purchases record view displays a single purchase in full detail including its fields and subpanels of related records. To access a purchase's record view, simply click a hyperlinked purchase name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this purchase.
Share	Share a link to this purchase via email.
Download PDF	Download the purchase to your computer as a PDF file. **Note**: Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.
Email PDF	Send an email with a PDF copy of the purchase as an attachment. **Note**: Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates. To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Find Duplicates	Locate potential duplicates of this purchase.
Copy	Duplicate this purchase to create a new purchase record. **Note**: The original purchase's product, comments, and related account will carry over to the new purchase.
Historical Summary	View a historical summary of activities (e.g., calls, meetings, etc.) related to this purchase.
View Audit Log	View a record of changes to this purchase.
Delete	Delete this purchase.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules.

Content Link	Description
Creating Records Basic Record Creation Creating via Subpanels Creating via Duplication Importing Records	The Creating Records section covers the various methods of creating new records, including via the Create button in the module, via the subpanel on related module records, duplication of an existing record, and importing a list of records into Sugar using a .csv spreadsheet.
Viewing Records Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Preview Viewing via Reports	The Viewing Records section describes the various methods of viewing records, including via the list view and record view, the Recently Viewed menu in the module tab, previewing records in the right-hand side panel, and reports displaying the record's data.
Searching for Records Global Search List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to the two searching methods for locating Sugar records: global search, which searches across all Sugar modules, and list view search, which searches and filters within the module.
List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview Record Actions Menu More Records Activity Stream	The List View section walks through the many elements of the List View layout, which contains a filterable list of all records in the current module. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.

Dashboards	
Record View Favorite Designation Following Designation Next or Previous Record Actions Menu Show More Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Activity Stream Dashboards	The Record View section walks through the many elements of the Record View layout which contains detailed information about a single record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the record view are described in the Record View Actions Menu section of this page.
Editing Records Editing Inline via Record View Editing via Record View Editing Inline via Subpanels Editing Inline via List View Mass Editing via List View	The Editing Records section describes the various methods of editing existing records, including inline via the record view, in full edit mode on the record view, inline via the subpanel on related module records, inline via the list view, and via the Mass Update option on the list view.
Deleting Records Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted records, including via the record view, an individual record's Actions menu on the list view, and the Mass Actions menu on the list view.
Exporting Records	The Exporting Records section provides an introduction to the export functionality, which allows you to download a list of records and all their data as a .csv file for use outside of Sugar (e.g., in Microsoft Excel).
Recalculating Calculated Values	The Recalculating Calculated Values section provides instructions on utilizing the Recalculate Values list view option to update calculated field values in the module if the administrator has changed the field's formula via Admin > Studio.
Finding Duplicate Records	The Finding Duplicate Records section provides instructions for locating duplicate records. If searching on matching fields (e.g., Name) identifies one or more duplicates, they can be

	merged into a single record.
Merging Records Merging via List View	The Merging Records section provides instructions for merging duplicates, which combines field values and related records into a single record.
Viewing Record Historical Summaries	The Viewing Record Historical Summaries section describes the Historical Summary record view option which displays quick details of the record's related calls, meetings, emails, notes, and tasks.
Viewing Record Audit Logs	The Viewing Record Audit Logs section describes the View Audit Log record view option which displays a history of changes to the record's audited fields.
PDFs Downloading PDFs Emailing PDFs	The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of record information as configured by an administrator via Admin > PDF Manager.
Favoriting Records Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking records as favorites, including via the list view, record view, or any subpanel appearing on the record view of a related module. Favoriting a record allows you to easily access it from list views, dashlets, or the module tab.
Following Records Following via List View Following via Record View	The Following Records section describes the various methods of marking records as "Following", including via the list view and record view. Following a record causes its activity stream updates to be included on your Home page and list view activity streams so that you can easily keep up with changes and user posts on the record.
Sharing Records	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the record. If the recipient is logged into Sugar, clicking the link will

	bring them directly to the record view.

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Quotes and Quoted Line Items

Overview

Sugar's Quotes and Quoted Line Items modules consist of quote records and quoted line item records, respectively, that specify all of the products that have already been sold or are in the process of being sold to clients. Each quote record serves as a header for the sale of products or services, and includes information about the entire transaction such as the billing address, total amounts, and stage. Each quote contains one or more quoted line items that represent each product or service that is being sold. Quoted line items include the quantity, prices, and discounts specific to a single product or service.

Since a quote is made up of one or more quoted line items, you will most often create quoted line items while creating the quote itself. You can create quotes in Sugar from the Quotes, Opportunities, or Revenue Line Items modules. You can select a product directly from the product catalog or manually enter a product that is not in the catalog during quote creation. Once created, you can generate the quote as a document in PDF format and send it to your clients.

This documentation covers the basics of the Quotes and Quoted Line Items modules as well as the various options available in performing the actions related to the modules. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting quote or quoted line item records, please refer to the Working With Sugar Modules section of this page.

Please note that you will only be able to see quote and quoted line item records as allowed by your license type, team membership, assigned roles, and user access type. For more information, please refer to the referenced documentation in the Administration Guide.

Quotes and Quoted Line Items

Quotes are often an integral part of an organization's negotiation and completion of sales. In Sugar, the Quotes module serves as a header for the sale and includes information about the entire transaction such as the billing address, total amounts, and stage. Each quote contains one or more quoted line items that represent each product or service that is being sold.

Quoted line items include the quantity, prices, and discounts specific to a single product. You can view the quoted line item's details in record view by clicking the line item in a quote or by navigating to it directly via the Quoted Line Items module if your administrator has enabled the module to appear in Sugar's navigation bar. For more information about how quotes and quoted line items interact, please refer to the Building Quotes section of this page.

Typically, you will use these two modules to produce the sales information you present to your clients (e.g., a PDF). Because of this fact, it is important to understand how these modules work together and with other parts of Sugar to get the best experience possible for you and your clients.

Note: Quoted line items created directly in the Quoted Line Items module via the Actions menu or Create button cannot be linked to a quote record.

Quote Fields

The Quotes module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The following definitions are suggested meanings for the fields, but some fields can be leveraged differently to meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove some fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration Guide.

Field Name	**Description**
Actual Close Date	The date on which the quote is accepted or rejected.
Assigned User	The Sugar user assigned to the quote.
Billing Account Name	The Sugar account to which the quote should be billed.
Billing Address	The billing address of the account to be billed for the product or service. **Note**: This group of fields will automatically populate from the related billing account record but can be edited on the quote without affecting the

	address on the related account record.
Billing Contact Name	The primary contact at the billing account for this order.
Converted Amount	The quote's grand total amount converted to the system default currency as configured in Admin > Currencies and the viewing user's preferred currency (if the Show Preferred Currency option is enabled). **Note**: If the applied exchange rate is modified via Admin > Currencies, the Converted Amount value will be automatically updated by a scheduled process. For more information on how currency changes affect the Converted Amount value, refer to the Updating Currency Rates section. For more information on the Converted Amount field, refer to the Grand Total vs Converted Amount section.
Date Created	The date a user created the quote record in Sugar.
Date Modified	The date the quote record was last modified in Sugar.
Date Shipped	The date the order shipped to the buyer.
Description	A description or other information about the quote.
Discount	The discounted amount (if applicable) for the quote.
Discounted Subtotal	The sum of quoted line items after any discounts have been applied.
Display Line Numbers	A checkbox that controls whether the quote record's line items should be sequentially numbered.
Grand Total	The sum of groups and line items after any tax, discounts, or shipping charges are applied.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on

	how to use this field.
Opportunity Name	The name of the opportunity related to the quote.
Order Stage	The current order stage (Pending, Confirmed, etc.) of the quote.
Original P.O. Date	The date on which a purchase order was issued.
Payment Terms	The time period within which the buyer must pay for the product or service.
Purchase Order Num	The purchase order (P.O.) number given by the buyer as proof of payment authorization.
Quote Number	The unique, system-generated number used to reference the quote.
Quote Stage	The current stage of the quote's life cycle (Draft, Closed Won, etc.).
Quote Subject	A brief summary of the product or service to be quoted.
Renewal[1]	A read-only checkbox indicating the record is a renewal. In Sugar Sell, this field is automatically set during renewal generation when a renewable service line item is "Closed Won". **Note**: This field is not on the layout by default.
Shipping	The shipping charge for the order. **Note**: Value must be manually added in the Shipping field at the bottom of the quote's worksheet and saved via the quote record's Save button at the top of the page.
Shipping Account Name	The Sugar account where the product or service will be delivered.
Shipping Address	The shipping address of the account that will receive the product or service. **Note**: This group of fields will automatically populate from the related shipping account record but can be edited on the quote without affecting the address on the related account record.

Shipping Contact Name	The primary contact at the shipping account for this order.
Shipping Provider	The shipping method for the order. **Note**: Shipping providers are configured by the administrator via Admin > Shipping Providers. Only shipping providers marked "Active" are displayed as options on the quote record.
Subtotal	The sum of quoted line items before any tax, discounts, or shipping charges are applied.
Tax	The tax rate to apply to the quote's taxable subtotal. **Note**: Tax rates are configured by the administrator via Admin > Tax Rates. Only tax rates marked "Active" are displayed as options on the quote record.
Teams	The Sugar team(s) assigned to the quote record.
Total Discount	The order's total discount as a currency amount.
Total Discount Percentage	The order's total discount as a percentage of the total amount. **Note**: This value is shown under the "Total Discount" label to the left of the Total Discount amount.
Grand Total	The total sum of all the groups and line items in the quote using the quote's currency. **Note**: For more information, please refer to the Grand Total vs Converted Amount section.
Valid Until	The date that the quote expires.

[1] For more information on service-related fields, refer to the Services and Renewable Revenue Line Items section of the Opportunities documentation.

Quote Stages

The Quote Stage field represents the quote's position in its life cycle. There are eight quote stages that come out-of-the-box with Sugar, and users with administrator or developer access have the ability to modify the quote stages via the quote_stage_dom list in Admin > Dropdown Editor. For more information on modifying dropdown lists, please refer to the Developer Tools documentation in the Administration Guide. The following definitions are suggested meanings for each quote stage, but the stages can be leveraged differently to meet your organization's needs.

Quote Stage	**Description**
Draft	The quote is not yet final.
Negotiation	The quote has been presented to the client and the client has requested modifications.
Delivered	The quote has been presented to the client for consideration.
On Hold	Activity related to the quote has been temporarily suspended.
Confirmed	The quote has been approved for sale.
Closed Accepted	The client has accepted the terms of the quote and agreed to proceed with the sale.
Closed Lost	The client has not accepted the terms of the quote and the sale has been lost.
Closed Dead	The client has neither accepted nor rejected the terms of the quote, but the sale has been presumed lost.

Order Stages

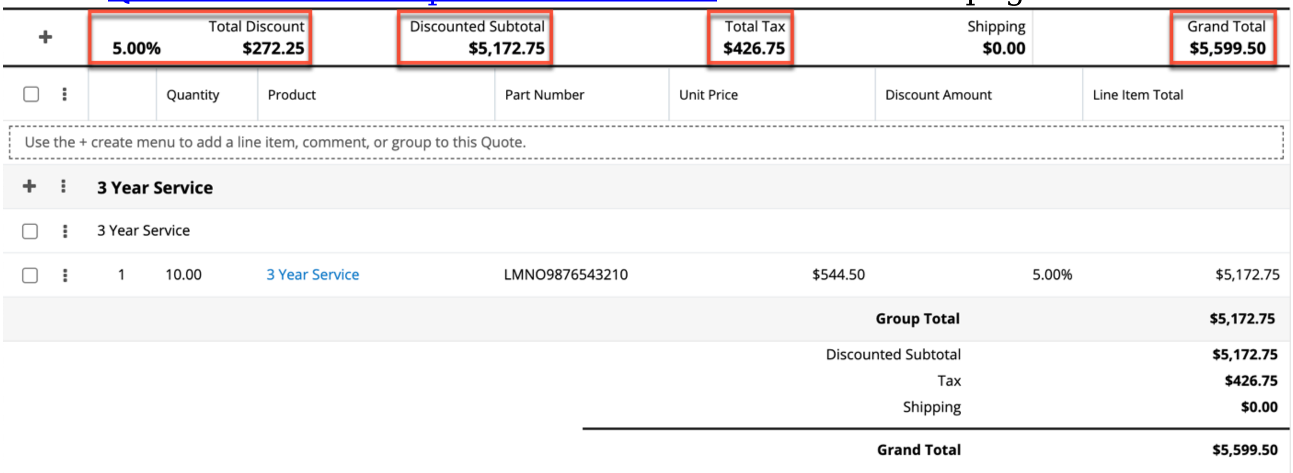
The Order Stage field is typically used to track the status of an order resulting from a Closed Accepted quote. There are five order stages which come out-of-the-box with Sugar, but users with administrator or developer access have the ability to modify the order stages via the order_stage_dom list in Admin > Dropdown Editor. For more information on modifying dropdown lists, please refer to the Developer Tools documentation in the Administration Guide. The following definitions are suggested meanings for each order stage, but the stages can be leveraged differently to meet your organization's needs.

Order Stage	**Description**

Pending	The order has been sent to your internal production team or supplier.
Confirmed	The order has been accepted by your internal production team or supplier.
On Hold	Processing on this order has been paused.
Shipped	The order has been released to the customer.
Canceled	The customer has canceled this order.

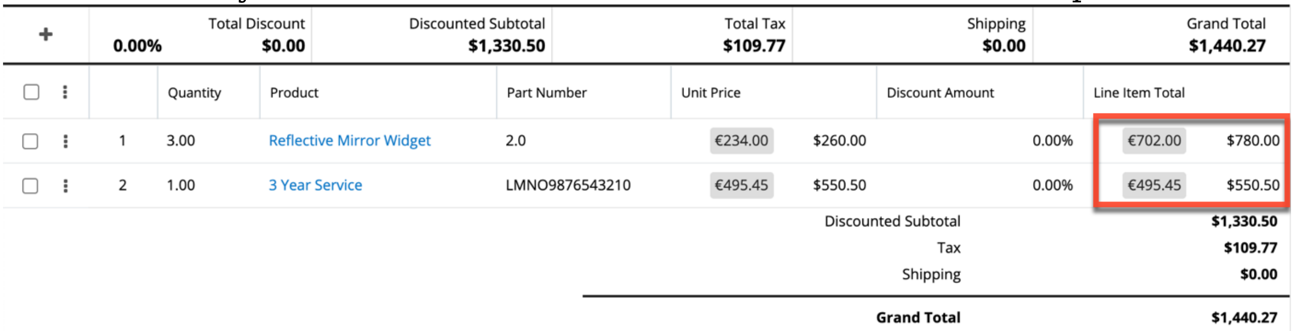
Calculated Fields

A quote's worksheet area is located just above the subpanels on a quote's record view. Users can add line items to the worksheet and then Sugar applies Sugar Logic to calculate the sum of the line items relative to applicable tax rates and any shipping charges or discount amounts that the user has specified. Several calculated fields contribute to the bottom line of a quote. These fields are shown at the top of the worksheet in the Totals bar and will instantly adjust for user-inputted data. The calculated fields are Total Discount, Discounted Subtotal, Total Tax, and Grand Total. For more information on the worksheet's layout, please refer to the [Quote Worksheet Options and Menus](#) section of this page.



In addition to the quote's calculated fields, each line item displays a calculated value labeled "Line Item Total". The value of each "Line Item Total" field's value is stored in the database in the Quoted Line Items module as total_amount and labeled "Calculated Quoted Line Item Amount" by default.

Note: If the line item's currency is different from the quote's selected currency, the "Line Item Total" will display the transactional value (grey box) in the line item's currency and the converted amount value next to it in the quote's currency.



Note: The value for a quote's Shipping charge is not a calculated value. It must be manually entered in the lower portion of the quote worksheet and saved via the quote record's Save button. You can click on the field to edit it or you can click the "Edit" button at the top of the record view. To save the value, click the "Save" button at the top of the record view.

Quoted Line Item Fields

The Quoted Line Items module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below 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 related to the quoted line item's quote.
Add On To [4]	The related purchased line item representing a coterminous add-on to an existing purchase. Available for quoted line items marked as a "Service". When a purchased line item record is selected via the filtered type ahead or search and select, the Service End Date field inherits its value from the purchased line item and is a fixed value. Service start date can be changed which automatically adjusts the service

	duration.
Assigned To	The Sugar user assigned to the quoted line item record.
Line Item Total	Displayed on the quoted line item's related quote worksheet, the line item's value based on the Quantity, Unit Price, Service Duration, and Discount Amount fields. This value is shown on the quote's worksheet, is automatically calculated, and cannot be directly modified. To adjust the Line Item Total, you must edit the quoted line item's quantity, unit price, service duration, or discount amount on the record view. **Note**: Service Duration is only factored into the calculation for line items related to a product catalog record marked as a service.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
Contact Name	The contact related to the quoted line item's quote.
Cost[1, 2]	The actual cost of the quoted line item's product.
Date Created	The date the quoted line item record was first saved.
Date Modified	The date the quoted line item record was last modified.
Description	A description or other information about the quoted line item.
Discount Amount	The discount percentage or amount provided for the quoted line item.

Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the [Integrate REST API endpoints]() in the Developer Guide for more details on how to use this field.
List Price[1, 2]	The quoted list price of the product.
Name	The product's name as selected from the product catalog list or manually entered as new.
Part Number[1]	The manufacturer's part number for the quoted line item's product.
Product	The product catalog record, if any, related to the quoted line item.
Quantity	The number of products being purchased.
Quote Name	The quote to which the quoted line item relates. **Note**: Quoted line items will only be related to quotes when they are created from the quote's worksheet.
Renewal[3]	A read-only checkbox indicating the record is a renewal. In Sugar Sell, this field is automatically set during renewal generation when a renewable service line item is "Closed Won". **Note**: This field is not on the layout by default.
Renewable[3]	For line items with "Service" enabled, select whether or not the service offered can be renewed for additional time periods. The Renewable field is used to trigger renewal pipeline automation.
Service[1,3]	Designate this line item as a service. Enabling the Service field will make the Service Duration (required), Service Start Date (required), and Renewable fields available.
Service Duration[1,3]	For line items with "Service" enabled, the period of time that this service covers. The Service Duration and Service Start Date fields are used to

	calculate the Service End Date and, when the Renewable field is set to yes, the Service Duration will determine the expected close date for future service opportunities. **Note**: When the line item is related to a product catalog record, the service duration value is inherited. If the product catalog record does not have its Lock Duration field checked, the quoted line item's service duration value can be edited.
Service Start Date[3]	For line items with "Service" enabled, select the date that the service will begin. The Service Duration and Service Start Date fields are used to calculate the Service End Date. This field is inherited from the product catalog but can be edited on a line-item basis.
Service End Date[3]	For line items with "Service" enabled, the Service End Date is calculated using the Service Duration and Service Start Date fields. Because this field is automatically calculated, it cannot be edited directly.
Status	The current status of the quoted line item.
Subtotal	The list price multiplied by the line item's quantity before any discount is applied .
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the quoted line item record.
Unit Price[2]	The unit price of the product.

[1] When a quoted line item is related to a product catalog record, this value automatically populates from the related product and cannot be modified on the quoted line item record. For more information on creating and managing records

in the Product Catalog, please refer to the Product Catalog documentation in the Application Guide.
[2] The displayed currency is based on the system's default currency as configured by administrators in Admin > Locale unless the user's preferred currency is defined in their user profile. You can change the quoted line item's currency from these defaults as desired. If the user has enabled "Show Preferred Currency" in their preferences, then Sugar will display the value in their preferred currency. If the user has disabled "Show Preferred Currency" in their preferences, then Sugar will display the value in the system's default currency as configured by the Administrator.
[3] For more information on service-related fields in Sugar Sell, refer to the Services and Renewable Revenue Line Items section of the Opportunities documentation.
[4] This field's value is only visible to Sugar Sell users; when this field appears on layouts, users without a supported license type will see a placeholder containing the text "License Required" instead of the field's value. See the User Management page for more details on license types.

In addition to the fields listed above, quoted line items that are related to a product catalog record inherit the following field values from the product:

- Asset Number
- Book Value
- Book Value Date
- Pricing Formula
- Product URL
- Serial Number
- Support Contact
- Support Description
- Support Expires
- Support Starts
- Support Term
- Support Title
- Tax Class
- Vendor Part Number
- Weight

For more information on Product Catalog fields, please refer to the Product Catalog documentation.

Building Quotes

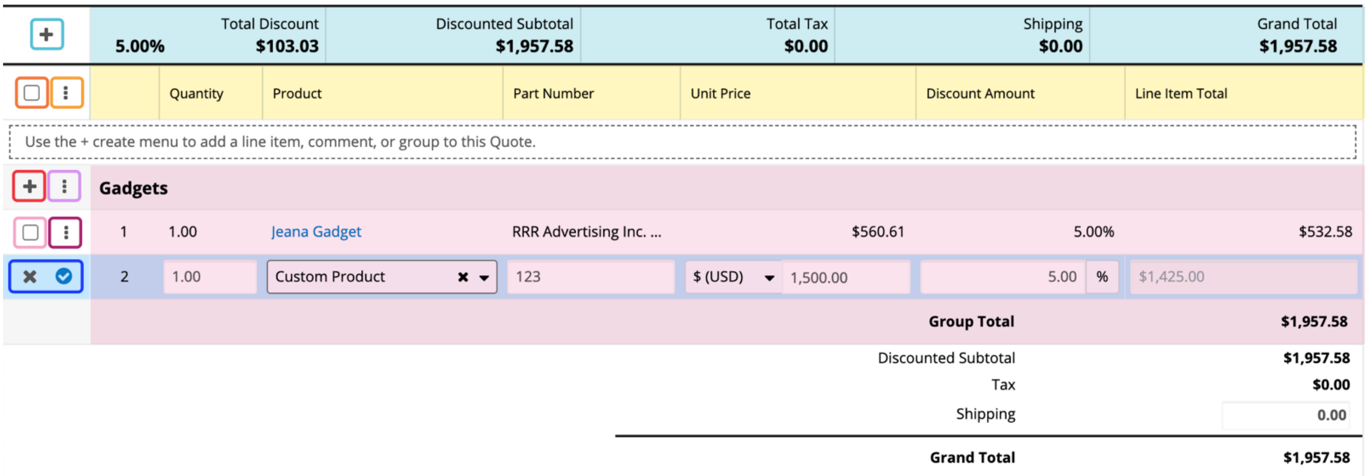
When creating quotes in Sugar, the full edit view layout opens and includes all of the quote fields in expandable panels labeled "Business Card", "Billing and

Shipping", "Quote Settings", and "Show More". Beneath the panels, there is a quote worksheet where product groups and quoted line items can be configured, rearranged, and tallied along with any discounts, taxes, or shipping fees.

Note: The quotes worksheet fields and field order can be modified by administrators via Admin > Quotes Configuration. The layouts for the panels above the worksheet can be configured by administrators via Admin > Studio. For more information on configuring these two layouts, please refer to the Studio and Quotes Configuration documentation in the Administration Guide.

Quote Worksheet Options and Menus

Below the quote record, the quote's worksheet contains several options and menus specific to the worksheet, its groups, and rows. In the following image, the blue section is the Totals bar, which displays the calculated totals for the worksheet; the yellow section contains the column headers for all of the quoted line items that you may add; and the pink section is an example of a group, which can contain any number of quoted line items and comments. The totals for all groups on the worksheet are added to the shipping charge and calculated tax to reach a grand total.



Note: If you are using Sugar Mobile, your administrator may need to take action for the quote worksheet configuration to be in sync. More information can be found in the Quotes Configuration documentation in the Administration Guide.

The following table describes the options and menus available on the example quote worksheet pictured above:

	Option	Description
	Create on Worksheet	Add a new group or create ungrouped line items and

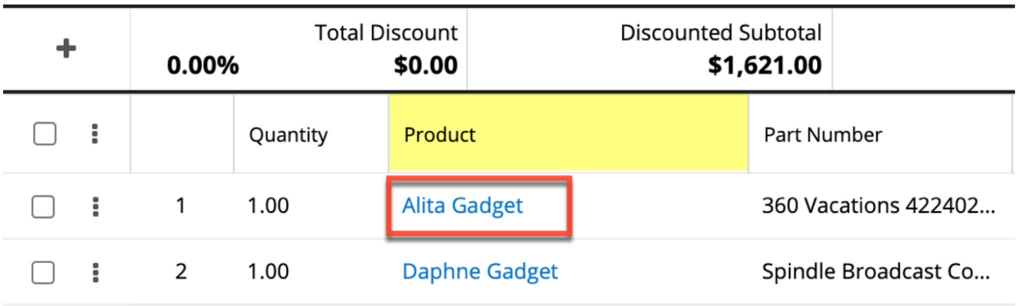
		comments.
	Select All	Select or deselect all rows on the worksheet.
	Mass Actions	Group or delete all selected rows.
	Create in Group	Add a new comment or line item to the group.
	Group Actions	Edit the group name or delete the group (does not delete the group's rows).
	Select Row	Select the line item or comment.
	Row Actions	Edit or delete the line item or comment.
	Row Save/Cancel	Save (□) a new or edited row or cancel (x) creating or editing the row.

Creating Quoted Line Items via Quote Worksheet

Since a quote is made up of one or more quoted line items, you will most often create quoted line items while creating or editing the quote itself. Quoted line items represent the specific products or services on the quote. The Quotes detail view layout allows you to add line items and select products. For more information about products, please refer to the Products and Quoted Line Items section of this page.

Each line added to a quote becomes a new quoted line item record upon save. You can create line items as independent rows on the quote or they may be included in a group, which typically contains additional, related line items. For more information on creating quote groups, please refer to the Creating Groups section of this page.

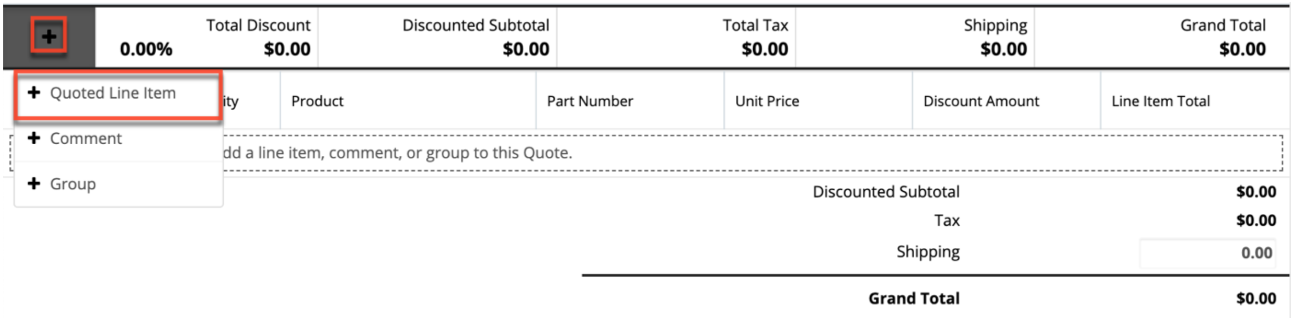
After adding a quoted line item to a quote, you can navigate to the quoted line item's record view by clicking its hyperlinked name on the quote worksheet.



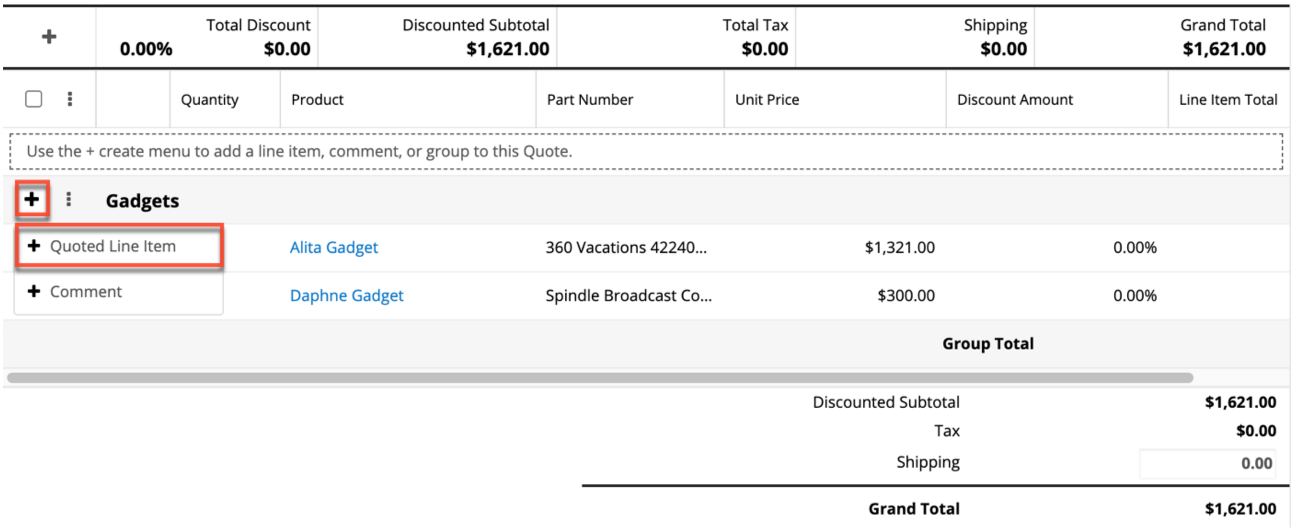
Creating Quoted Line Items

When adding products as quoted line items, you may select a product from your database's Product Catalog directly in the line item or via Product Catalog or Product Catalog Quick Picks dashlets or you may manually enter a new product on the fly. Either way, each line item added to a quote will create a new record in the Quoted Line Items module.

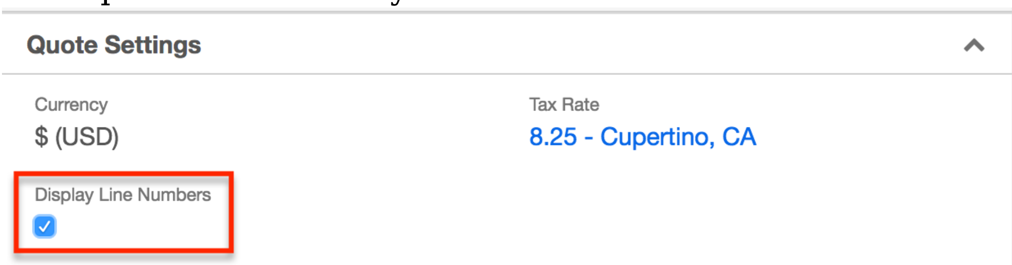
To create a line item as an independent row on the quote worksheet, click on the Create (+) button to access the worksheet's available actions and select "+ Quoted Line Item":



To create a line item inside a group on the quote worksheet, click on the group's Create (+) button to access the group's available actions and select "+ Quoted Line Item":



Please note that line numbers are only visible next to quoted line items when the "Display Line Numbers" field is enabled in the quote record's Quote Settings panel. This option is enabled by default.



Please refer to the following sections for more information on [creating a new custom line item]() and creating line items [via product catalog]().

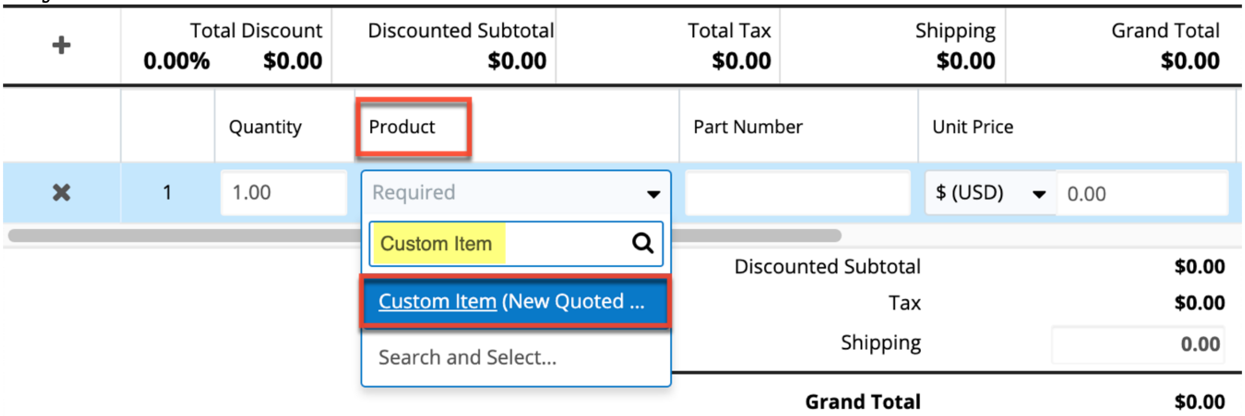
Creating Custom Quoted Line Items

If you need to add a line item for a product that is not in the Product Catalog, you can instantly create a custom line item directly from the quote worksheet. Custom line items are stored in Sugar as quoted line item records but are not added to the Product Catalog.

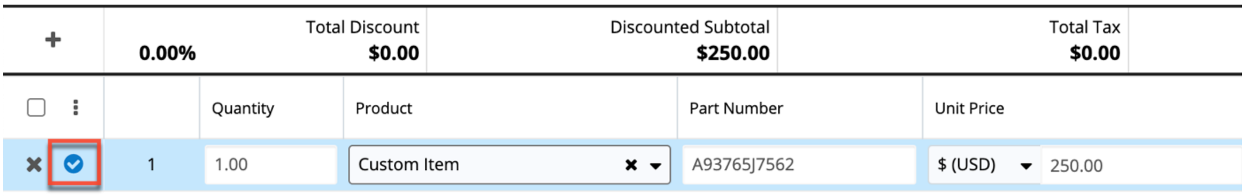
Follow these steps to create a custom line item for a quote:

1. Choose "+ Quoted Line Item" from the worksheet's Create (+) menu or from the group's Create (+) menu as desired.
2. Click on the Product dropdown field in the new row and begin typing the product that you would like to use as a line item. When you enter the first letter of a product, Sugar will begin to display recommendations from the Product Catalog that begin with the same letter. To ignore the

recommendations and create an entirely new product, completely type out the name of the product as you would like it to appear on the quote and then click on the New Quoted Line Item menu option or press the Enter key.



3. Enter the quantity, unit price, and remaining line item fields as needed. **Note**: By default, custom line items will use the quote's selected currency but you can change the line item's currency from these defaults as desired. When the line item's currency is different from the quote's selected currency, the Unit Price and Line Item Total fields will display the transactional amount in a grey box using the line item's currency and the converted amount next to it in the quote's currency.
4. Click the blue checkmark next to the row to save the line item.



This will save the row to Sugar's database as a quoted line item record but will not affect the Product Catalog. After adding a quoted line item to a quote, you can navigate to the quoted line item's record view by clicking its hyperlinked name on the quote worksheet. For the list of fields available in the quoted line items record view, please refer to the Quoted Line Item Fields section.

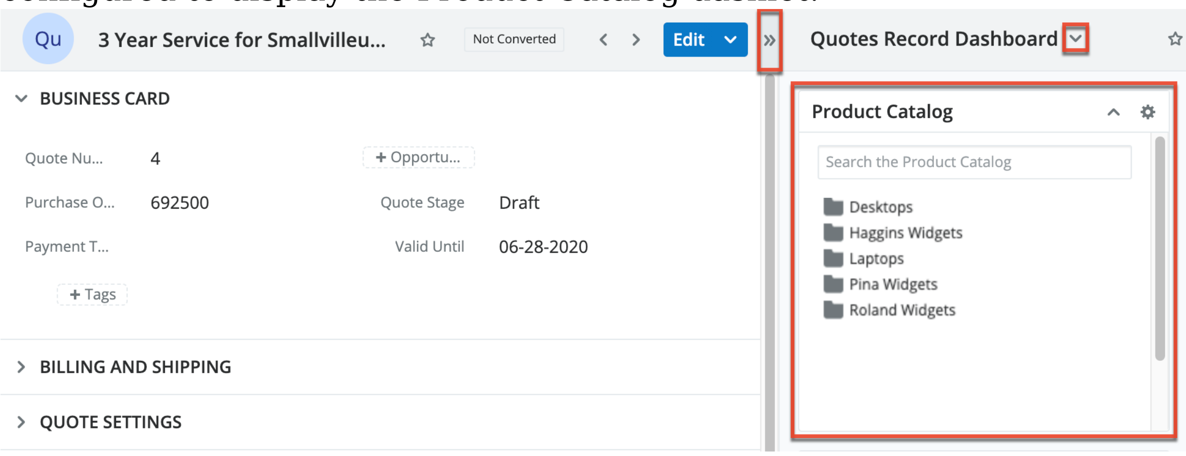
Creating Quoted Line Items via Product Catalog

If you need to add a line item for a product that is in the Product Catalog, you can easily find and select the product directly from the Product Catalog dashlet or the Product Catalog Quick Picks dashlet, which is located next to the quote form when creating a new quote and also on a Quotes record view intelligence pane. For more information on interacting with these dashlets, refer to the Product Catalog Dashlet and the Product Catalog Quick Picks Dashlet sections of this documentation. In addition to the dashlets, you can also select the product directly from the Product dropdown field on the quote worksheet.

Note: The Product Catalog records must be created before users can select products when adding line items. The Product Catalog, Product Categories, Product Types, and Manufacturers modules are accessible by all users. For more information on adding and modifying products in the product catalog, please refer to the Product Catalog documentation. When you select an item from the Product Catalog dashlet, the line item's tax class, cost, and manufacturer information will be pre-filled by values set by your administrator and therefore cannot be edited.

The following steps cover adding a line item to the quote worksheet using the Product Catalog dashlet as an example:

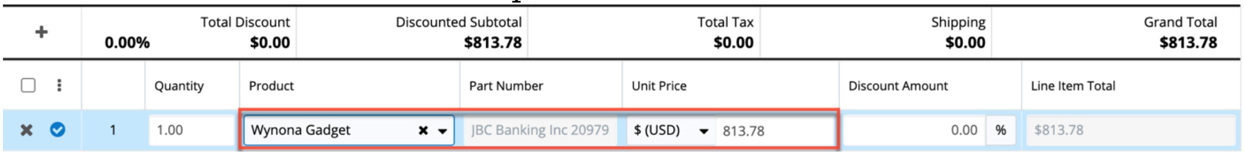
Note: You can follow the same steps below to add a line item using the Product Catalog Quick Picks dashlet.

1. Create a new quote record via any of the various creation methods explained in the User Interface documentation. For this example, we will select "Create Quote" from the Quote module's tab menu.
   Note: To view and use the Product Catalog dashlet with existing quote records, simply expand the quote's record-view dashboard (if needed) by clicking on the double-arrow icon next to the record's Edit button and then select the Quotes Record Dashboard or any other dashboard that has been configured to display the Product Catalog dashlet.
   

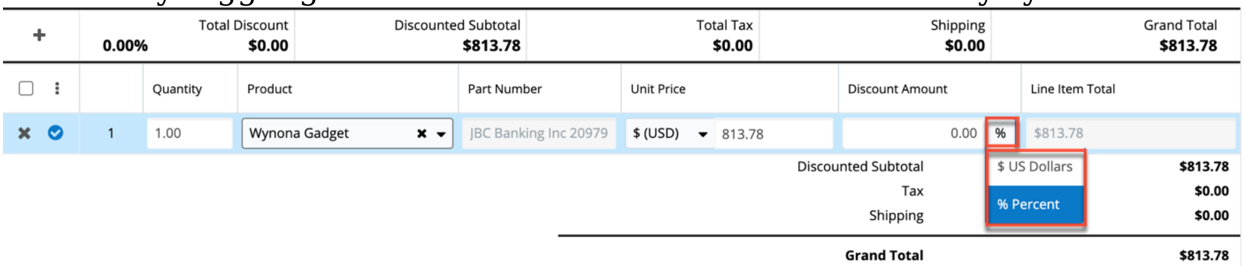
2. On the create screen, enter the general quote information in the form's fields.
3. When completing the form fields, the Product Catalog dashlet will be displayed to the right of the quote form. When you are ready to create a new quoted line item, click on any product name in the dashlet to instantly add it as an editable line item to the quote's worksheet. The line item's fields will populate with the part number and unit price, which are copied from the Product Catalog. The Part Number field cannot be edited for line items created via Product Catalog. By default, line items created using the product catalog will use the product catalog item's currency but you can change the line item's currency from these defaults as desired. If the line item's currency is different from the quote's selected currency, the Unit Price and Line Item Total fields will display the transactional amount in a

grey box using the line item's currency and the converted amount next to it in the quote's currency

Note: If you wish to select the product directly from the line item on the quote worksheet instead of via the dashlet, you will need to first create a line item on the quote worksheet then click on the Product dropdown field to enter and select the desired product.



4. Modify the quantity field if the default value of "1" is not correct. Please note that users may enter line items with a quantity of zero to denote optional products, previously-paid items, or to handle other situations. Rows with zero quantity will not affect the value of the quote.
5. Optionally, apply a discount to the line item. By default, the discount field accepts a percentage value, but users can enter an absolute discount amount by toggling the Unit button from "%" to the currency symbol.

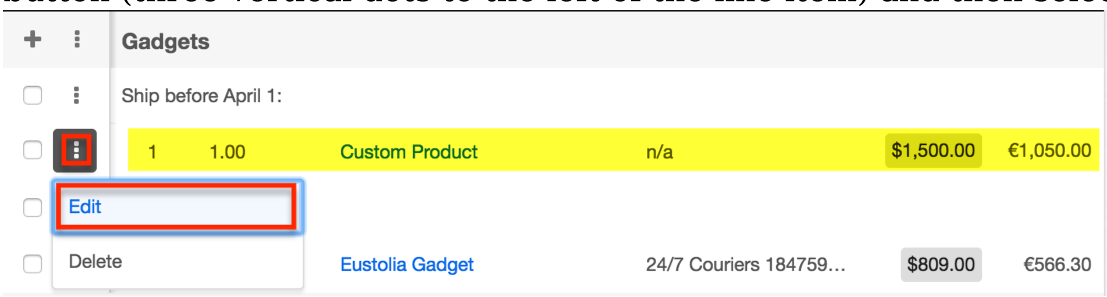


6. After completing the line item, click the blue checkmark next to the row to save the line item.

This will save the row to Sugar's database as a new quoted line item record.

Editing Quoted Line Items

To change the editable values of a quoted line item, click on the row's Actions button (three vertical dots to the left of the line item) and then select "Edit".



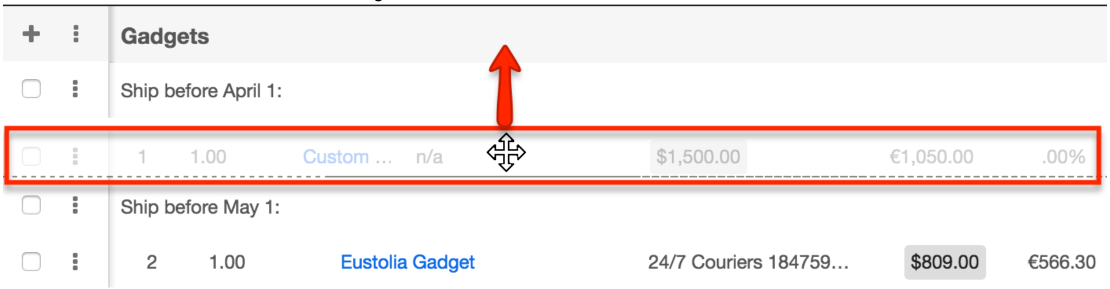
Custom line items are fully editable. The quantity and discount are editable for line items from the product catalog, or you may change the selected product, which will reset the row's values appropriately. After updating the quoted line item, click the blue checkmark to apply the changes or click the Cancel (x) icon to cancel any changes and revert the row's values. If the line item's value has changed, the quote's totals will automatically recalculate. If the edited line item is in a group, then the group's totals will recalculate, as well.

Moving Quoted Line Items

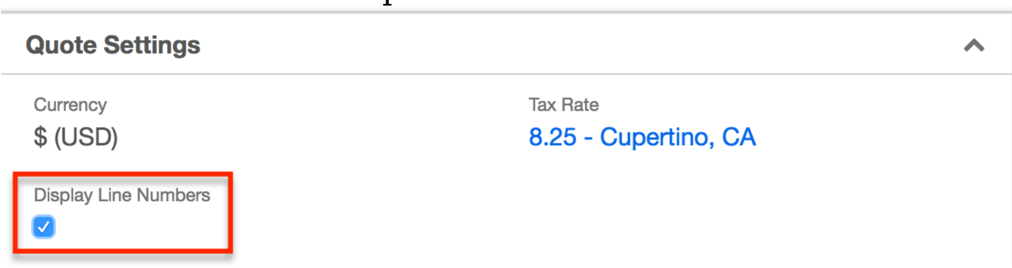
Users can move quoted line items to a new position on a worksheet. Simply save the row and then click and hold anywhere on the line item until the mouse tip changes to a four-directional arrow. Drag the row to the preferred position on the worksheet and then release the mouse button.

Note: Quoted line items cannot be moved when they are in edit mode.

Line items can be moved within a group, from one group to another group, or out of a group to an independent row. When you change the position of a line item, its line number will adjust accordingly and so will the line numbers for any other rows affected by the change. Upon moving line items into or out of a group, the group's totals will automatically recalculate.



Please note that line numbers are only visible when the "Display Line Numbers" field is enabled on the quote record.

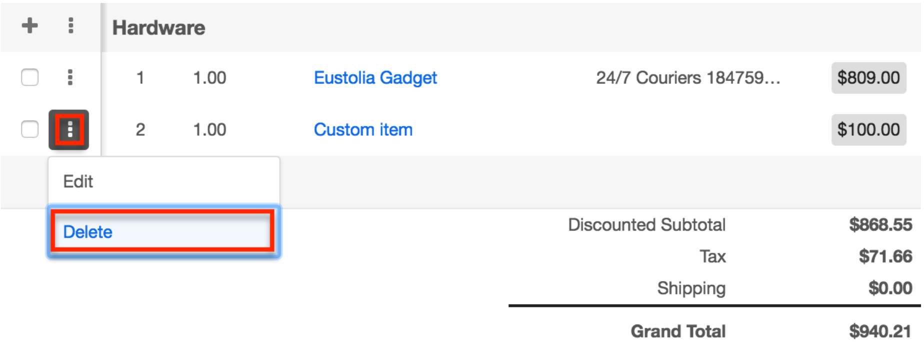


Moving a quoted line item into or out of a group is audited by the quoted line item record's activity stream, but changing the position of a line item within a single group is not tracked.

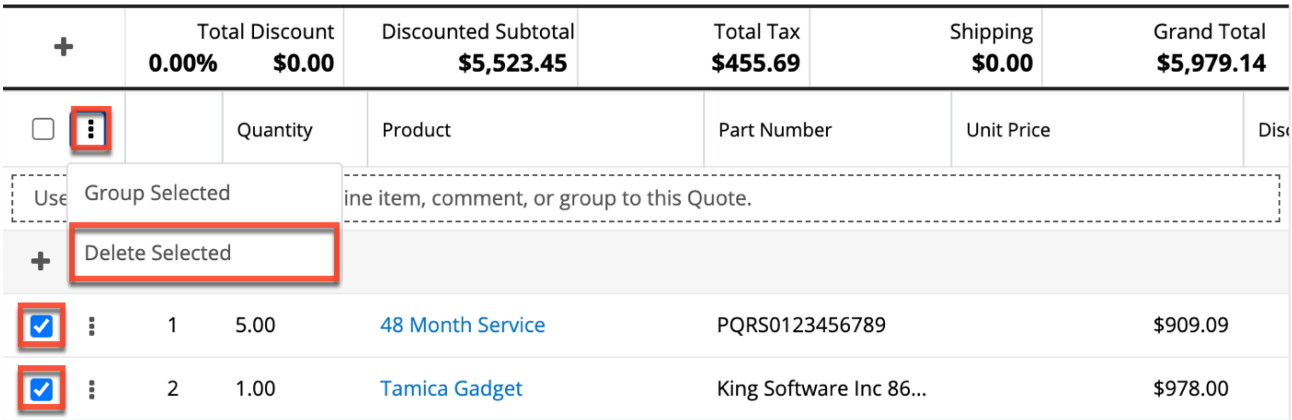
Deleting Quoted Line Items

If you delete a line item from a quote's worksheet, you cannot get it back. You will delete the record from the Quoted Line Items module. The quote worksheet allows you to delete a single quoted line item or to use a mass action for deleting several line items at once. Upon deleting line items, the quote's totals will recalculate automatically. If the deleted line items were in a group, the group totals will recalculate, too.

To delete a single quoted line item, click on the line item row's Actions button (three vertical dots to the left of the line item's name) and then select "Delete".



To delete multiple line items at once, identify the quoted line items that you would like to delete and place a checkmark in the empty checkbox next to each item's row. Click on the worksheet's Actions button (three vertical dots in the Totals bar) and select "Delete Selected".



Quoted Line Item Groups

The quote's worksheet allows users to add products from the product catalog and arrange them in groups. Groups may also contain comments. Groups are optional for quote records so you can omit them altogether in favor of independent line items or create one or more groups to organize similar products or services together. For example, a quote for software might have a group labeled "Services" to contain the quoted line items for implementation and extended support.

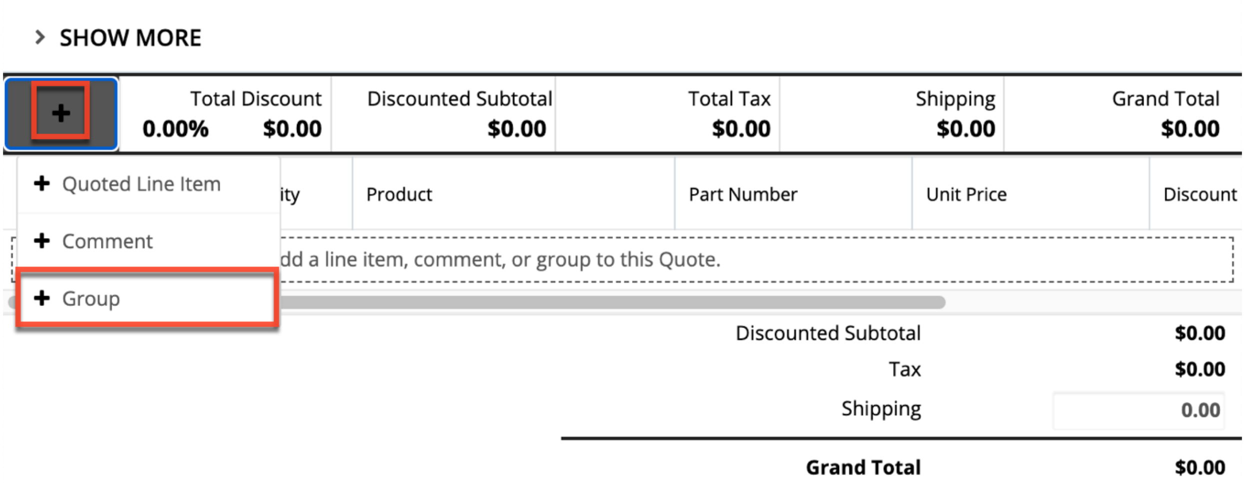
Note: Creating a group of quoted line items adds a product bundle record in the database. For more information on the Quotes architecture in Sugar, refer to the Quotes page in the Developer Guide.

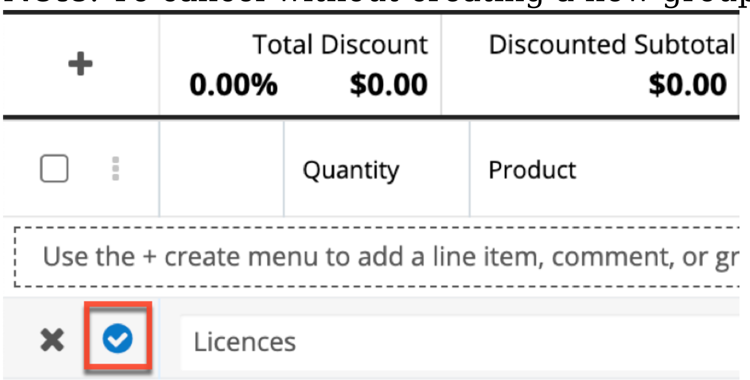
Creating Groups

Empty groups can be created via the worksheet's Create menu. Alternatively, users can create a group from existing comments and quoted line items. The next two sections explain each method.

Creating Empty Groups

Use the following steps to add a new group to the quote's worksheet:

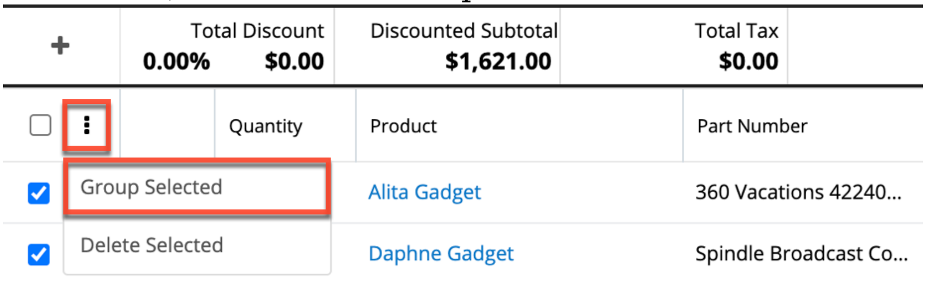
1. After filling in and saving the quote's fields, scroll down to the quote's worksheet and click on the Create (+) button to access the worksheet's available actions and select "+ Group".


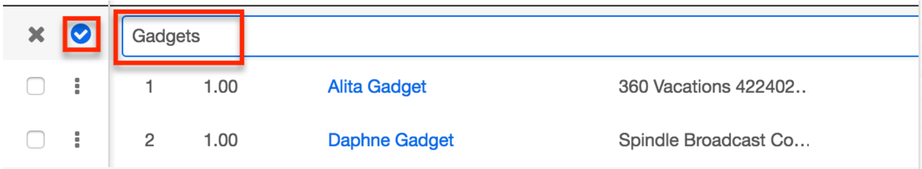
2. Enter an optional name for the new group and then click the Save icon. To create an unnamed group, just click the Save icon without entering any text.
Note: To cancel without creating a new group, click on the Cancel (x) icon.


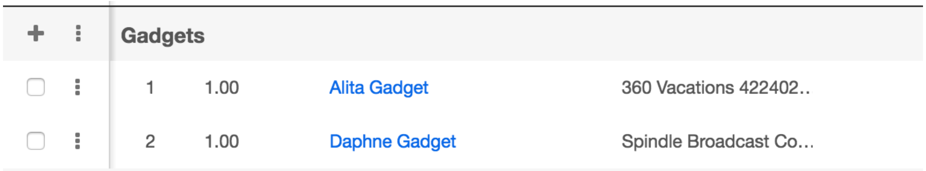
You now have a new group and can start [adding line items](#) to the group.

Creating Groups from Quoted Line Items

If a quote already has line items and you want to move some or all of those line items into a new group together, follow these steps to create a new group from the quoted line items:

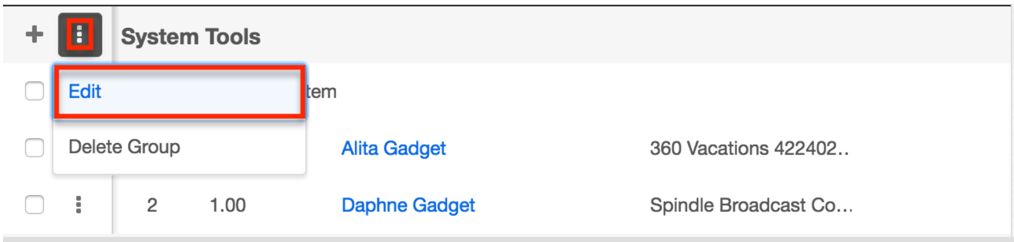
1. From the quote's worksheet area, identify the quoted line items that you would like to group together and place a checkmark in the empty checkbox next to each item's row.
2. Next, click on the worksheet's Actions button (three vertical dots in the Totals bar) and select "Group Selected".


3. Enter an optional name for the new group and then click the Save icon. To create an unnamed group, just click the Save icon without entering any text.
Note: To cancel without creating a new group, click on the Cancel (x) icon.


4. The selected items now exist within the new group:


Editing Groups

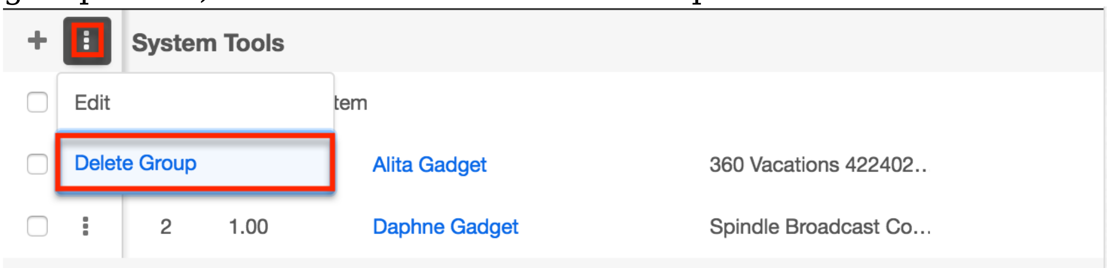
To edit a group's name, click on the group's Actions button (three vertical dots to the left of the group name) and then select "Edit".



To edit the position of quoted line items and comments in a group, you can simply drag and drop the rows to the desired location. Line items and comments can be rearranged within the group, moved to a new group, or moved out of groups to independent lines on the quote worksheet. For more information, please refer to the Moving Quoted Line Items and Moving Comments sections.

Deleting Groups

When you delete a group from a quote's worksheet, any quoted line items that were in the deleted group will simply become ungrouped on the quote. To delete a group, click on the group's Actions button (three vertical dots to the left of the group name) and then select "Delete Group".



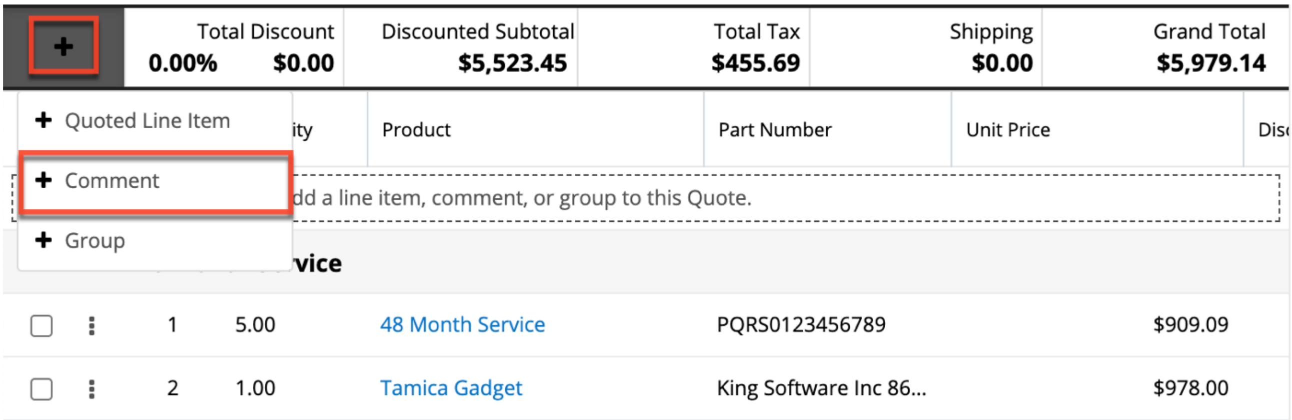
Comments

Comments are user-created notes on the quote worksheet. Comments are included on the default quote PDF templates. You can create comments as independent rows on the quote or they may be included in a group. For more information on creating quote groups, please refer to the Creating Groups section of this page. Because comments, like quoted line items, occupy rows on the worksheet, they can be added, edited, moved, and deleted from the sheet in the same way as quoted line items.

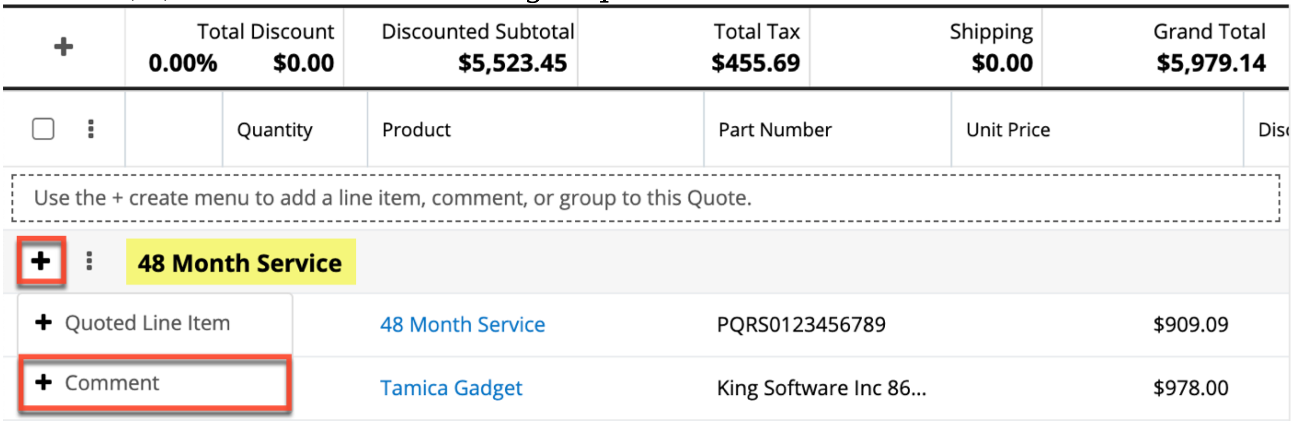
Creating Comments

To create a comment as an independent row on the quote worksheet, click on the Create (+) button to access the worksheet's available actions and select "+

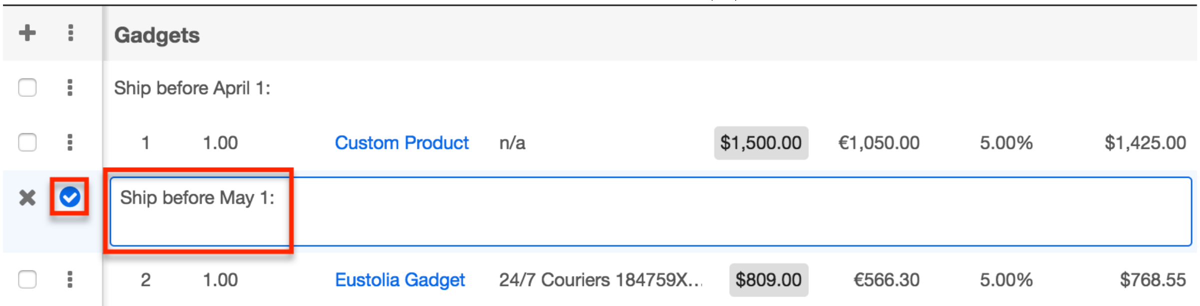
Comment":



To create a comment inside a group on the quote worksheet, click on the group's Create (+) button to access the group's available actions and select "+ Comment":

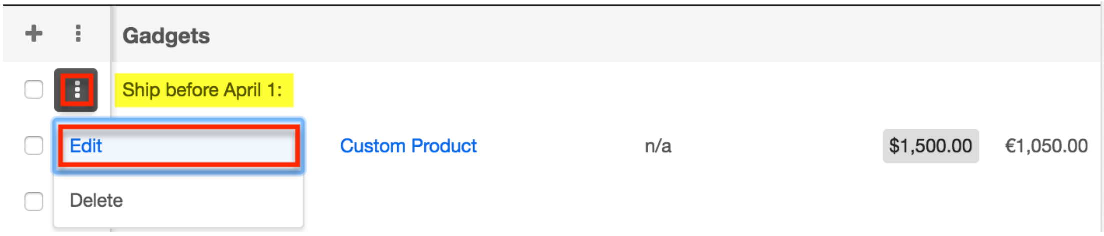


Type the comment into the text box and then click the blue checkmark to save the comment as a new row or click the Cancel (x) icon to remove the comment's row:

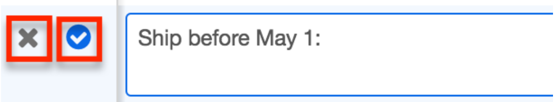


Editing Comments

To edit a comment's text, click on the comment row's Actions button (three vertical dots to the left of the comment) and then select "Edit".

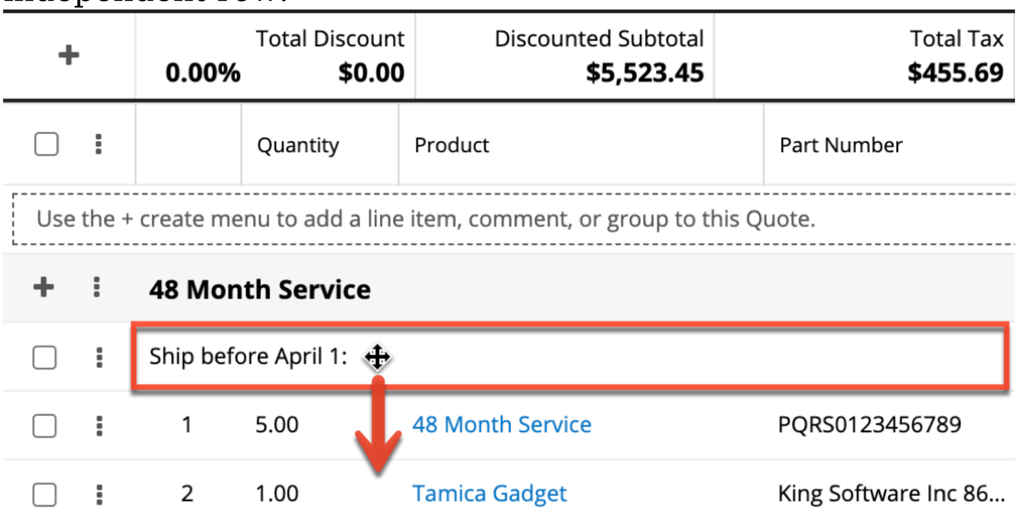


After updating the comment, click the blue checkmark to preserve the changes or click the Cancel (x) icon to cancel any changes and revert the text.



Moving Comments

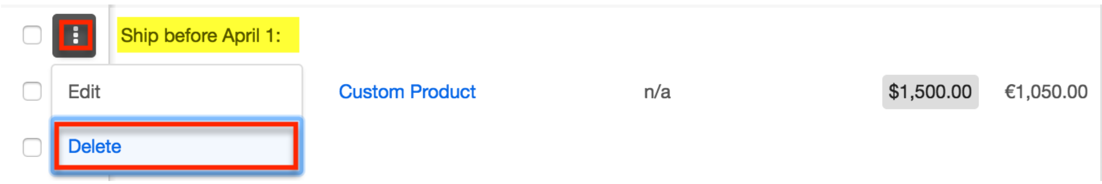
Users can move comments to a new position on a worksheet. Simply save the comment and then click and hold anywhere on the comment row until the mouse tip changes to a four-directional arrow. Drag the comment to the preferred position on the worksheet and then release the mouse button. Comments can be moved within a group, from one group to another group, or out of a group to an independent row.



Note: Comments cannot be moved when they are in edit mode.

Deleting Comments

To delete a comment from the quote worksheet, click on the comment row's Actions button (three vertical dots to the left of the comment) and then select "Delete".

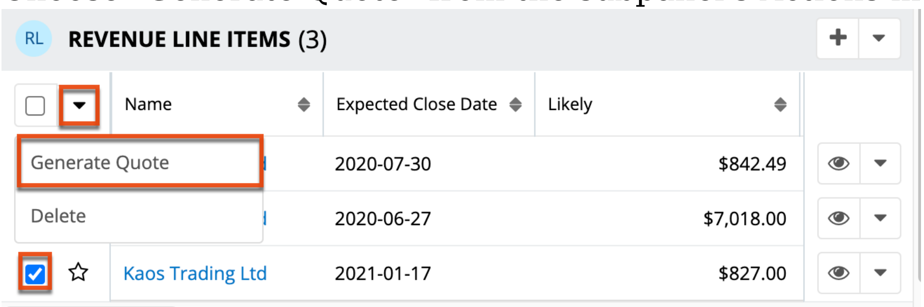


Generating Quotes From Revenue Line Items

Quotes may be generated from one or more of an opportunity's revenue line items via the Opportunities record view's Revenue Line Items subpanel.

Use the following steps to generate a quote from an opportunity's Revenue Line Items subpanel:

- Navigate to the Revenue Line Item subpanel on an opportunity's record view.
- Select the revenue line items you wish to include on a quote.
- Choose "Generate Quote" from the subpanel's Actions menu.



- The new quote is opened in record view to allow additional changes. Make any necessary changes to the quote's fields then click "Save" to finalize the new quote record.

The quote record is automatically generated with a quoted line item record for each revenue line item record.

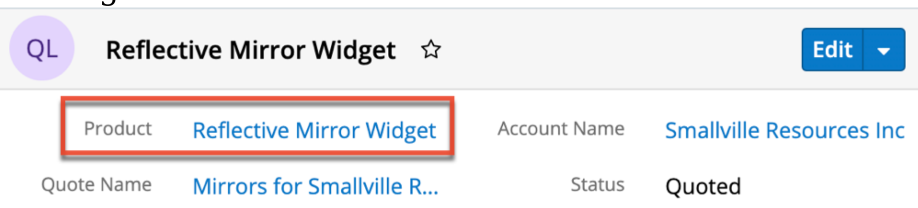
Products and Quoted Line Items

Sugar's Product Catalog module contains a list of all products or services that your organization sells. This module provides the Quoted Line Items and Revenue Line Items modules with the template used when creating products to be used for Quotes and Opportunities, including pricing and cost information as well as information about the manufacturer. The Product Catalog, Product Categories, Product Types, and Manufacturers modules are accessible by all users. For information and actions specific to those modules, please refer to the Product

Catalog documentation in the Application Guide.

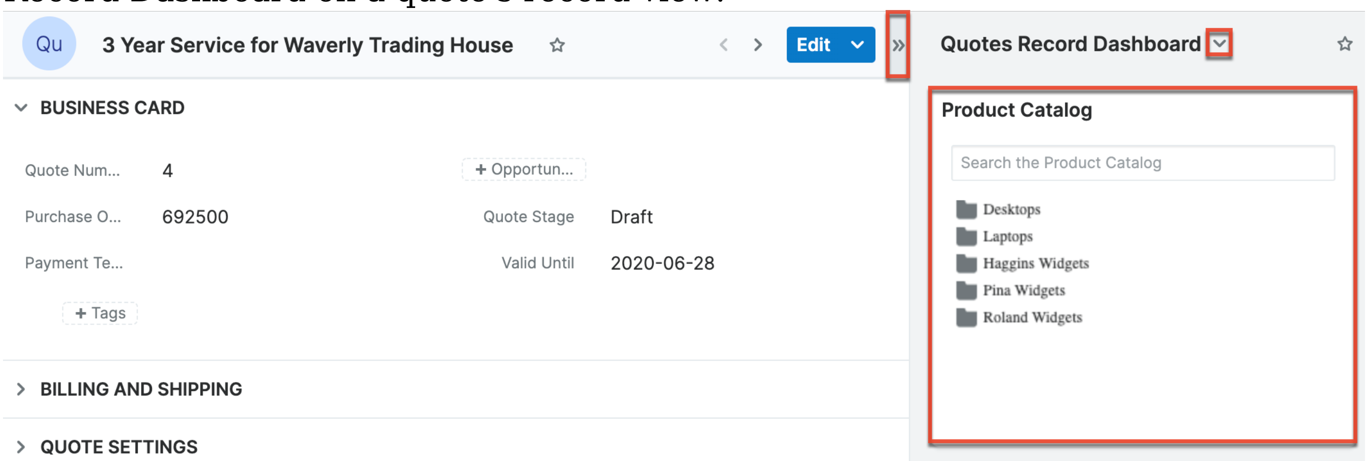
When adding products as quoted line items, you may select a product from your database's Product Catalog module or you may manually enter a new product on the fly. Either way, each line item added to a quote will create a new record in the Quoted Line Items module. After adding a quoted line item to a quote, you can navigate to the quoted line item's record view by clicking its hyperlinked name on the quote worksheet.

If you selected a product from the product catalog, the Product field will be populated with the product's name on the quoted line item's record view. However, if you manually entered a custom product to your quoted line item, then the Product field will not be populated since the product does not exist in the product catalog.



Product Catalog Dashlet

The Product Catalog dashlet provides users with a simple way to access the Product Catalog directly from the quote record and instantly add products from the catalog as line items on the quote worksheet. The Product Catalog dashlet is located next to the quote form when creating a new quote and also on the Quotes Record Dashboard on a quote's record view.



The following sections explain the various features and components of the Product Catalog dashlet. For detailed steps on creating quoted line items via the Product

Catalog dashlet, please refer to the [Creating Quoted Line Items via Product Catalog] section of this page.

Note: The Product Catalog records must be created before users can select products when adding line items. The Product Catalog, Product Categories, Product Types, and Manufacturers modules are accessible by all users. For more information on adding and modifying products in the product catalog, please refer to the Product Catalog documentation. When you select an item from the Product Catalog dashlet, the line item's tax class, cost, and manufacturer information will be pre-filled by values set by your administrator and therefore cannot be edited.

Viewing Products and Categories via Dashlet

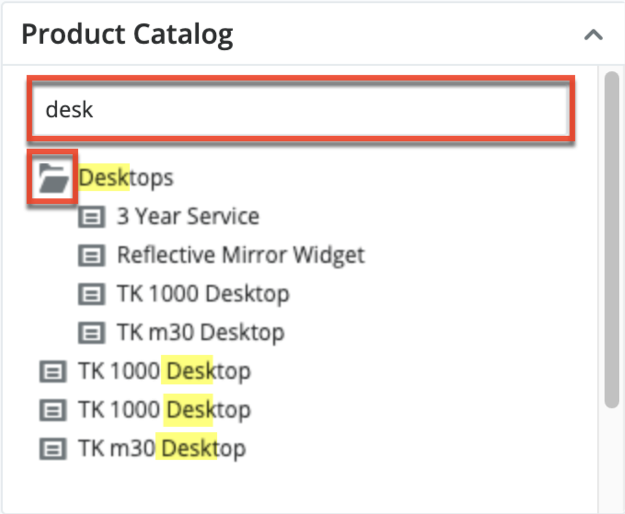
In the Product Catalog dashlet, product categories are represented as folders and are organized to reflect the structure of the customer's category hierarchy. Users can search for products and categories and click on individual folders to reveal the products contained in each category. To close an expanded category folder, click on the open-folder icon.

Note: Only products with a status of "Active" are displayed in the Product Catalog dashlet.

Simply click on a card icon or product name to instantly add the product to the quote worksheet. The new line item will be pre-populated with values specific to the product and can be edited for quantity, discount, or unit price prior to saving. For more information, please refer to the Creating Quoted Line Items via Product Catalog section of this page.

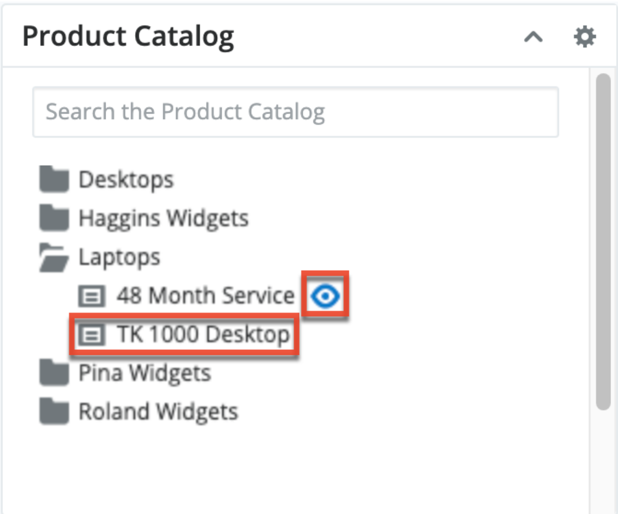
Searching for Products and Categories via Dashlet

Users can also search for products using the Search field on the Product Catalog dashlet. Upon entering a search term, a list of matching product categories and matching products will be shown in the dashlet. If the user clicks on a category (e.g., a folder) in the list of search results, all products in the category are loaded, not only the products that match the search terms.



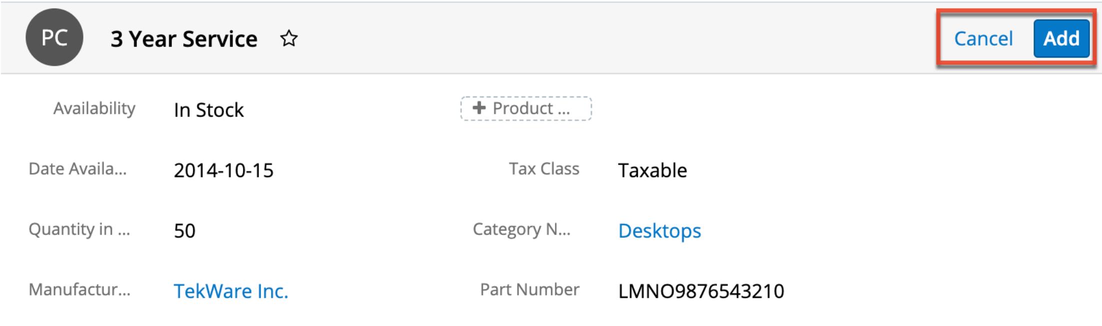
Previewing Products via Dashlet

Click on the Preview icon to the right of a product name to view the complete details of its Product Catalog record:



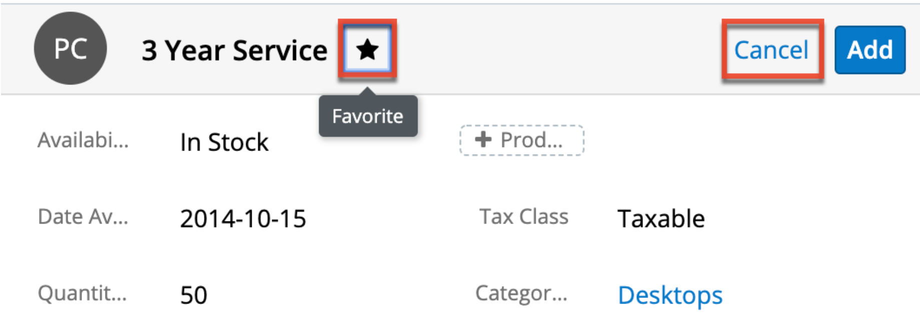
Note: You can click on the card icon or product name to add it as a quoted line item without reviewing the product.

After clicking the Preview icon, the record's detail view opens. Click the "Add" button to add it to the quote as a quoted line item. To close the Product Catalog record's details without adding the product as a line item, click the "Cancel" button.



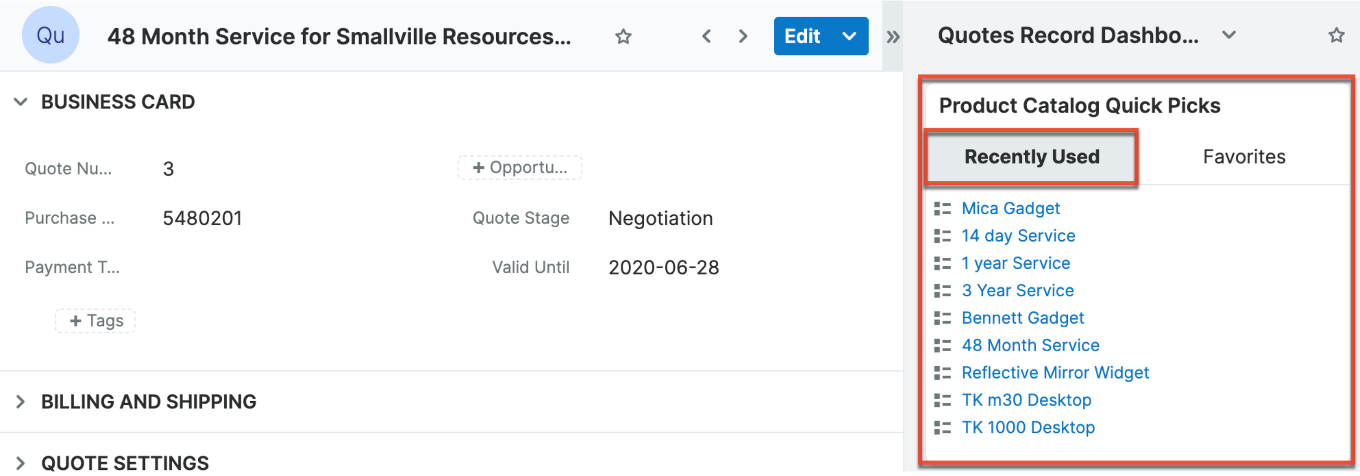
Favoriting Products via Dashlet

For products in the product catalog that you use often and would like easier access to, you can mark the product as a favorite when viewing the details of the record. Simply click the star icon to the right of the product's name in the upper left of the record view to designate it as a favorite. To close the product catalog record's details, simply click the Cancel button. If you wish to remove the product as a favorite, click the star again to revert it to white. After a product is marked as a favorite, it will appear under the Favorites tab of the Product Catalog Quick Picks dashlet.



Product Catalog Quick Picks Dashlet

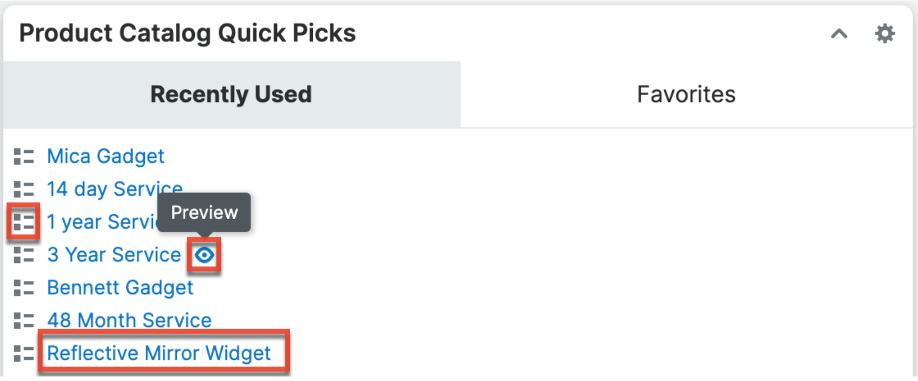
The Product Catalog Quick Picks dashlet provides easy access to active products in the product catalog that you recently used or marked as favorites. The dashlet consists of two tabs (Recently Used, Favorites) and is located next to the quote form when creating a new quote and also in the Quotes record view intelligence pane. If the dashlet is not displayed in the intelligence pane, you can add the dashlet by editing the dashboard. For more information on adding dashlets, refer to the Dashboards and Dashlets documentation. The Recently Used tab allows you to see a list of active products from the product catalog that you most recently added as line items on a quote worksheet. While the Favorites tab displays a list of active products that you have marked as favorites. For more information on marking products as favorites, refer to the Favoriting Products via Dashlet section of this page.



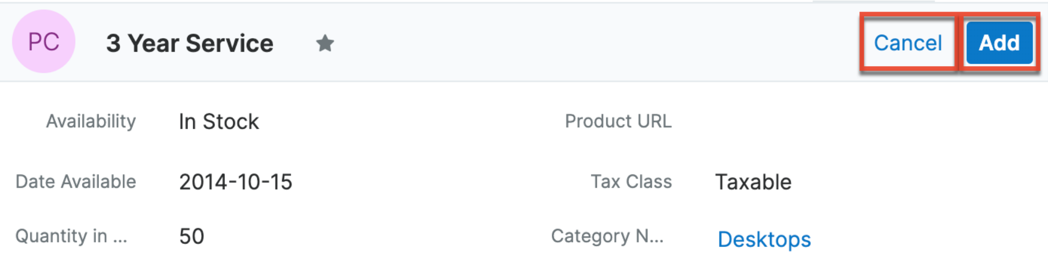
You can select products directly from the Product Catalog dashlet or the Product Catalog Quick Picks dashlet to instantly add it as a line item on the quote worksheet. For more information, refer to the Creating Quoted Line Items via Product Catalog section of this page. Once the product is added as a quoted line item, you can refresh the page and it will appear under the Recently Used tab of the Product Catalog Quick Picks dashlet. Please note that the dashlet will display up to 10 products that you most recently used across quote records.

Previewing Products via Dashlet

If you wish to view the record details of the product prior to adding it as a quoted line item, you can hover over the product's name in the dashlet and click the preview icon. This will open the product catalog's record view.

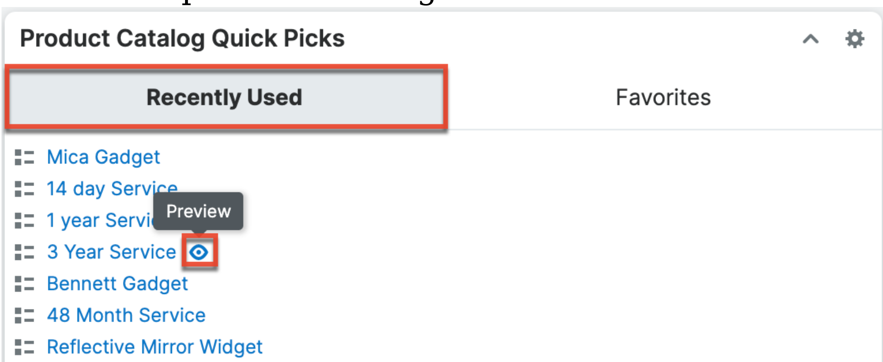


Click the Add button on the record view to add the product as a quoted line item or click "Cancel" to close the product catalog's record view without adding the product. Please note that you can also add the product as a quoted line item without viewing the record by clicking the card icon or the product name directly from the Product Catalog Quick Picks dashlet.

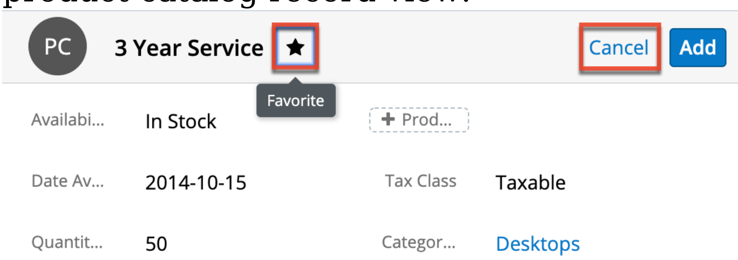


Favoriting Products via Dashlet

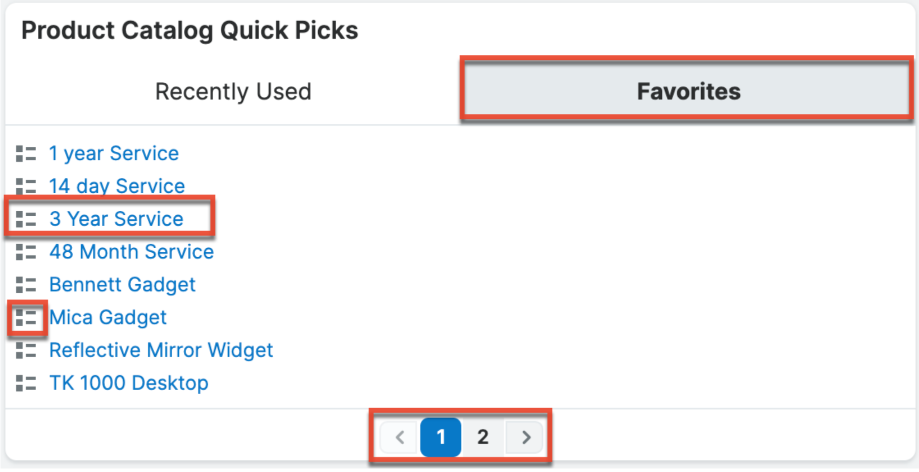
In addition to [favoriting]() a product when viewing the details of the record via the Product Catalog dashlet, you can also mark a product listed in the Product Catalog Quick Picks dashlet as a favorite. Simply hover over the desired product's name (e.g., 3 Year Service) under the Recently Used tab and click the preview icon to access the product catalog record.



Click the star icon to the right of the product's name on the the upper left of the record view to designate it as a favorite. If you wish to remove the product as a favorite, click the star again to revert it to white. Click "Cancel" to close the product catalog record view.



After a product is marked as a favorite, it will appear under the Favorites tab in alphabetical order. By default, the dashlet displays 8 products per page, and you can click the left and right arrow buttons or the page number to view the next or previous list of favorited products. You can also click the card icon or the product name under the tab to add it as a line item to new or existing quotes. For more information on adding line items using dashlets, refer to the Creating Quoted Line Items via Product Catalog section of this page.

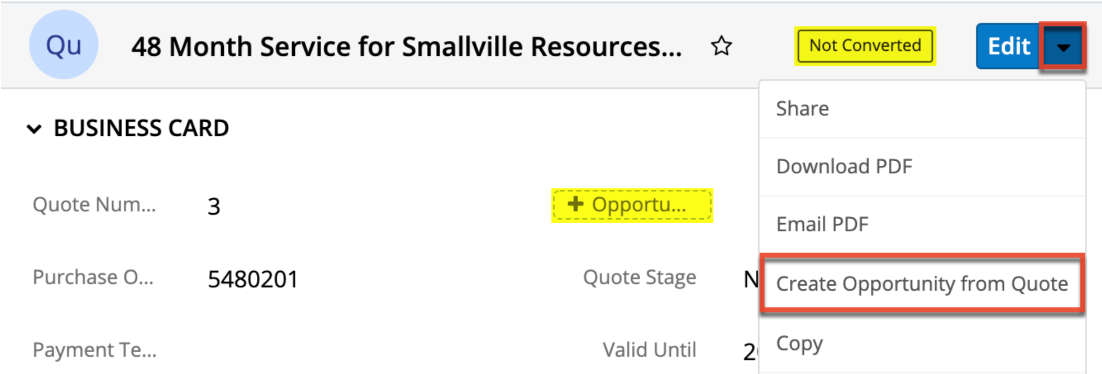


Creating Opportunities from Quotes

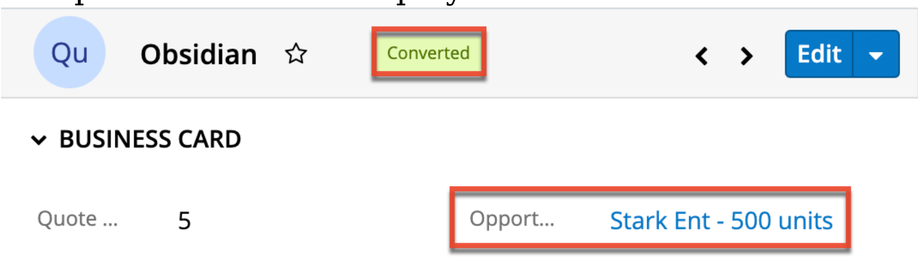
Opportunity records in Sugar represent prospective sales. As you interact with your client and present the quote for your products and services, you can create an opportunity from the quote's detail view to track the quote's progression through your organization's sales stages. The new opportunity is populated with the original quote's values to reflect the opportunity name, account name, expected close date, best, likely, and worst amounts. Any other populated fields will be based on the default values as they are defined in Studio for the Opportunities module. On save, the new opportunity record will automatically be related to the quote record in Sugar, and the quote record will show that it has been converted.

Note: For instances using revenue line items, each quoted line item on the quote will become a revenue line item related to the newly created opportunity record.

To create an opportunity from a quote, navigate to a quote's record view. Select "Create Opportunity from Quote" from the Actions menu. If the option is grayed out in the menu, confirm that the quote's Opportunity Name field is empty and that the quote record is labeled "Not Converted". Quotes that already relate to an opportunity are considered converted and cannot be converted into another related opportunity.



Sugar will instantly create and save a new, related opportunity and redirect you to the opportunity's record view. You may update the opportunity if needed by clicking "Edit" and then saving the changes. The opportunity's Quotes subpanel will display the originating quote record. Click on the quote's name and the quote will now display the related opportunity's name in the Opportunity Name field and the quote's label will display "Converted".

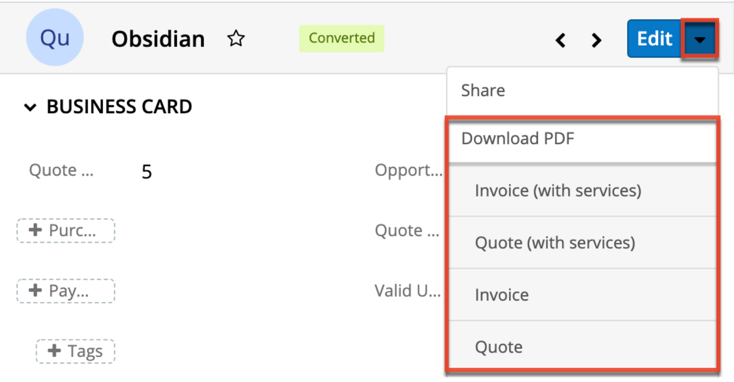


Downloading Quotes as PDFs

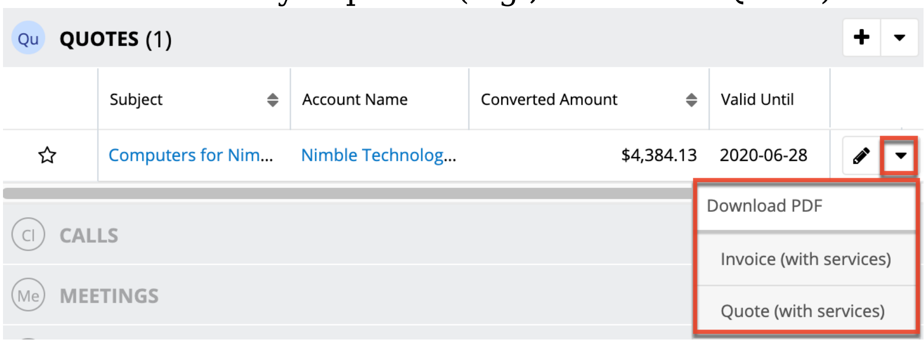
Users can download Sugar quote records in PDF format via the quote's Actions menu or from any Quotes subpanel on a related record. There are several default PDF templates that are included with the Quotes module, but administrators may create new quote PDF templates or modify the default templates via Admin > PDF Manager. For more information on editing and adding PDF templates, please refer to the PDF Manager documentation in the Administration Guide. The default quote PDFs included with Sugar are: Quote, Quote (with services), Invoice, and Invoice (with services). Templates "with services" will include service-related fields such as Service Start Date, Service End Date, and Service Duration.

The Download PDF option enables you to easily download the quote to your machine and email or print and mail it to your client outside of the Sugar application. The default PDF formats list the details (e.g., quantity, product name, etc.) of the items or services for purchase as well as any comments and pricing information. Once the client approves the quote's terms and agrees to purchase your product or service, you can generate an invoice for payment.

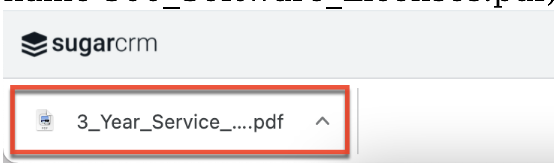
To download a PDF from the quote's record view, find the Download PDF option in the quote record's Actions menu and the available PDF formats will be listed in the subsequent rows. If the PDF options are hidden, simply click on "Download PDF" to expand the PDF options. Click on the PDF format that you prefer (e.g., Invoice or Quote).



To download a PDF from a related record's Quotes subpanel, expand the Actions menu for the quote record in the subpanel and find the Download PDF option. The available PDF formats will be listed in the subsequent rows. If the PDF options are hidden, simply click on "Download PDF" to expand the PDF options. Click on the PDF format that you prefer (e.g., Invoice or Quote).



After downloading the file, locate the PDF in your browser's footer or in your computer's Downloads folder. It will be named Quote_Name.pdf where Quote_Name is the name of the quote record with underscores in place of space characters (e.g., a quote named "300 Software Licenses" will export with the file name 300_Software_Licenses.pdf).



The .pdf document will contain all of the information from the quote's worksheet as well as the quote number, assigned user's name, and billing and shipping information.

10050 N Wolfe Rd
SW2-130
Cupertino, CA 95014

Quote

Quote number:	4
Sales Person:	Will Westin
Valid until:	06-28-2020

Bill To	Ship To
Smallville Resources Inc 9 IBM Path Denver, CA, 53571 USA	9 IBM Path Denver, CA, 53571 USA

3 Year Service

Quantity	Part Number	Quoted Line Item	Duration	List Price	Unit Price	Ext. Price	Discount:
10.00	TekWare Inc. LMNO9876543210	3 Year Service 3 Year Service	3 Year(s) Starts: 06-28-2020 Ends: 06-27-2023	$550.00	$544.50	$5,445.00	0.00%

Subtotal:	$5,445.00
Discount:	$0.00
Discounted Subtotal:	$5,445.00
Total	$5,445.00

Currencies and Quotes

Sugar allows your organization to perform business around the world by supporting multiple currencies. Administrators must first add desired currencies and exchange rates to Sugar via Admin > Currencies. They also have the ability to set the instance's default currency via Admin > Locale. This is typically the currency of the country where the majority of business is conducted. For more information, refer to the System documentation in the Administration Guide.

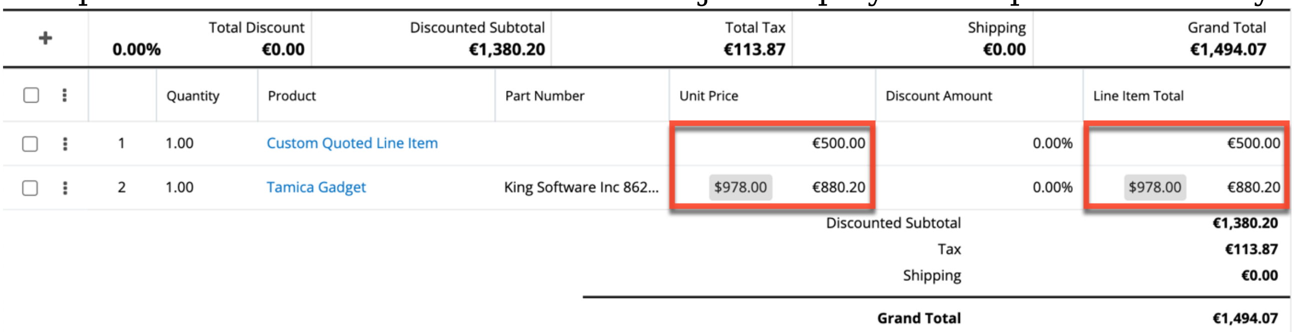
Each quote record has a Currency field in the Quote Settings panel where you can specify the currency being used for the particular business transaction. By default, the field displays the system default currency unless the user's preferred currency is defined in their user profile. When line items are added to the quote's worksheet, the default currency for each line item will vary depending on how it is entered (manually or via Product Catalog). Line items built from product catalog items will use the product catalog item's selected currency by default while custom line items will use the quote's selected currency. For more information on creating and managing the Product Catalog, refer to the Product Catalog documentation in the Application Guide. Please note that you can change each line item's currency from these defaults as desired.

By default, the Unit Price, Cost, and List Price fields will display using the system's default currency unless the user's preferred currency is defined in their user profile. For more information on configuring your preferred currency, refer to the Getting Started documentation. Please note that the quoted line item's currency can be changed from these defaults to the specific currency being used for the particular business transaction.

Note: The Show Preferred Currency option in the user's profile will not affect the Quoted Line Items record view to convert the saved amounts using the user's preferred currency. This is different from how quoted line item currencies work in Sugar Mobile. See the Working With Quoted Line Items section of the Android and iOS User guides for more information.

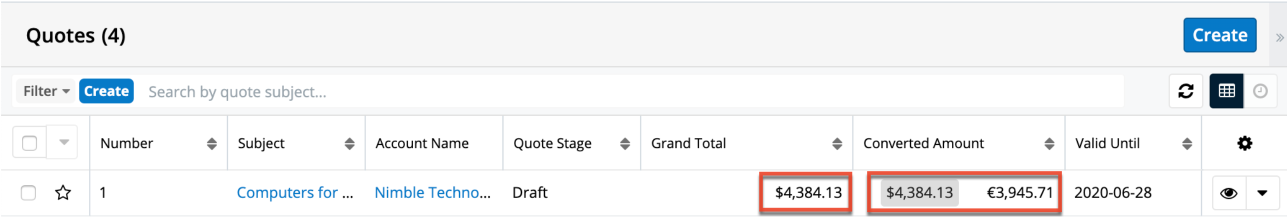
For each line item in the quote's worksheet, the unit price and line item total values will display in the quote's selected currency. However, if the line item's currency differs from the quote's currency then the Unit Price and Line Item Total fields will display the transactional amount, in the line item's currency, in a grey box next to the converted amount in the quote's currency. Please note that the Show Preferred Currency option in the user's profile will not affect the line items in the quote's worksheet.

In the following example below, the quote's selected currency is Euros (€). The first line item is a custom quoted line item that was manually entered, so it uses the quote's selected currency (Euros) by default. The second line item (TK 1000 Desktop) was created from a product catalog item, so its transactional value (grey box) uses the catalog item's currency, US Dollars. Now, since this line item's currency differs from the quote's currency, the converted amount will display next to the grey box using the quote's currency (Euros). Please note that if the second line item's base currency was changed to the quote's currency (Euros), then the unit price and line item total values would just display in the quote's currency.



In the Quotes list view, there are two currency-type fields where the values are displayed using different currencies:

- **Grand Total**: Displays the total sum of all the groups and line items in the quote using the quote's currency.
- **Converted Amount**: Displays the grand total amount converted to the system default currency (grey box) and the viewing user's preferred currency (if the Show Preferred Currency option is enabled).



For more information about converted currency amounts, refer to the Updating Currency Rates section of this page.

Note: Quote currencies work differently in Sugar Mobile. See the Totals and Shipping section of the Android and iOS User guides for more information on how the mobile application uses quote currencies.

Grand Total vs Converted Amount

The stock Quotes list view contains two fields, Grand Total and Converted Amount, that differ in functionality. The Grand Total field displays the total sum of all the groups and line items in the quote using the quote's selected currency while the Converted Amount field displays the grand total amount converted to the system default currency. If the viewing user's Show Preferred Currency option is enabled in their user profile, the Converted Amount field will also display the converted amount in the viewing user's preferred currency. For more information on setting a user's Preferred Currency and Show Preferred Currency options, refer to the Getting Started documentation.

The primary differences between these fields and options are as follows:

Field Name	Value Displayed	Method to Update Value
Grand Total	The total sum of all groups and line items in the quote using the quote's selected currency.	Updated by editing the quote record.
Converted Amount (system default currency)	Grand Total amount converted to the system default currency based on the system-defined conversion rate.	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)	Grand Total amount converted to the viewing	Updated by modifying the relevant exchange rate via

	user's preferred currency as specified in their user profile based on the system-defined conversion rate.	Admin > Currencies. For more information on how currency changes affect the Converted Amount value please see Updating Currency Rates.

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 amounts when the quote's currency differs from the system default currency. 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:

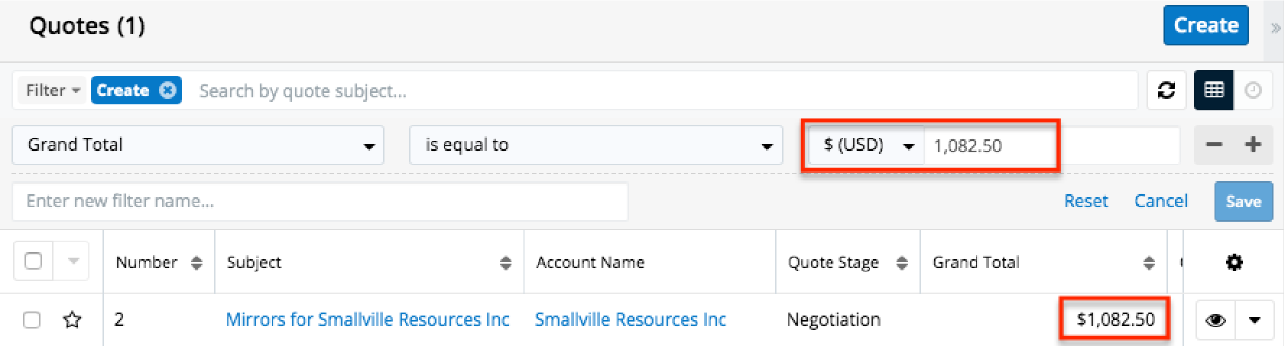
- The quote undergoes a save event (e.g., mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved in the quote.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled 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 enabled, the Converted Amount field displays the Grand Total 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 Getting Started documentation.

For more information about currency exchange rates, please refer to the System documentation in the Administration Guide.

Filtering on Currency Fields

Currency fields are filtered according to the record's set currency rather than being standardized to the user's preferred or system default currency. In the list view, filtering quotes by a currency field allows you to specify the filter's currency. Only records matching both the chosen currency and amount range will be returned. For example, if you filter based on a Grand Total value of 1,082.50 in US Dollars, then the search result will return a quote with a Grand Total value of $1,082.50 but will exclude values of €1,082.50 or other currency values which are equivalent to $1,082.50.



Note: By contrast, when filtering values in the Reports module, any record matching the specified amount or range will be returned regardless of the record's currency. For example, if one quoted line item's Unit Price value is $500 in US Dollars and another's is €500 in Euros, filtering a report for a Likely value of exactly 500 will return both records in the report.

Working With Sugar Modules

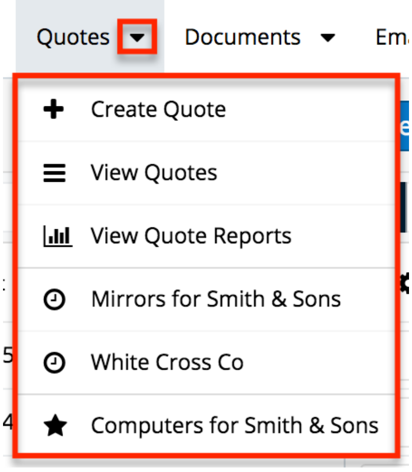
The Quotes module uses Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Quote Menus

The Quotes module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Quotes-specific functionality, on this page.

Module Tab Menus

The Quotes module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Quotes list view. You may also click the triangle in the Quotes tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu displays options for creating and viewing quotes. The Recently Viewed menu displays the list of quotes you last visited. The Favorites menu displays the list of quotes you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Quote	Opens the record view layout to create a new quote.
View Quotes	Opens the list view layout to search and display quotes.
View Quote Reports	Directs you to the Reports list view filtered to display only reports based on the Quotes module.

For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

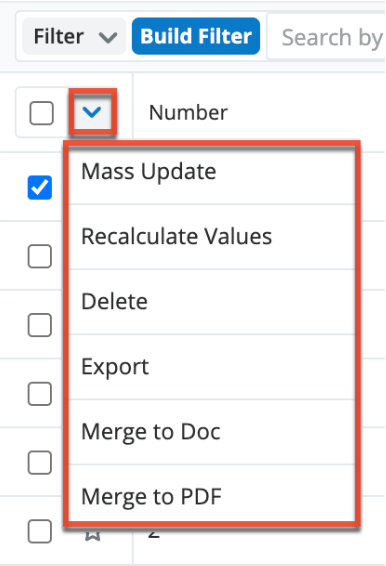
List View Menus

The Quotes list view displays all quote records and allows for searching and filtering to locate specific quotes. You can view the basic details of each record within the field columns of the list view or click on a quote's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use

the checkbox on each record's row to select individual quote records or click the checkbox in the list header to select all records displayed on the current set of list view results.

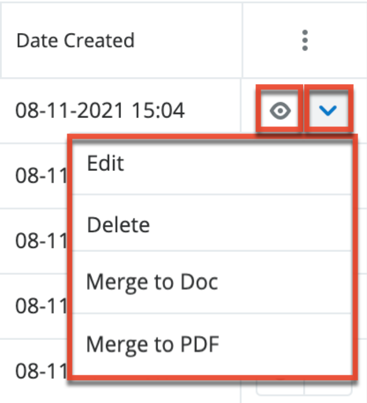


The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more quotes at a time.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Delete	Delete one or more quotes at a time.
Export	Export one or more quotes to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on a quote directly from the list view.

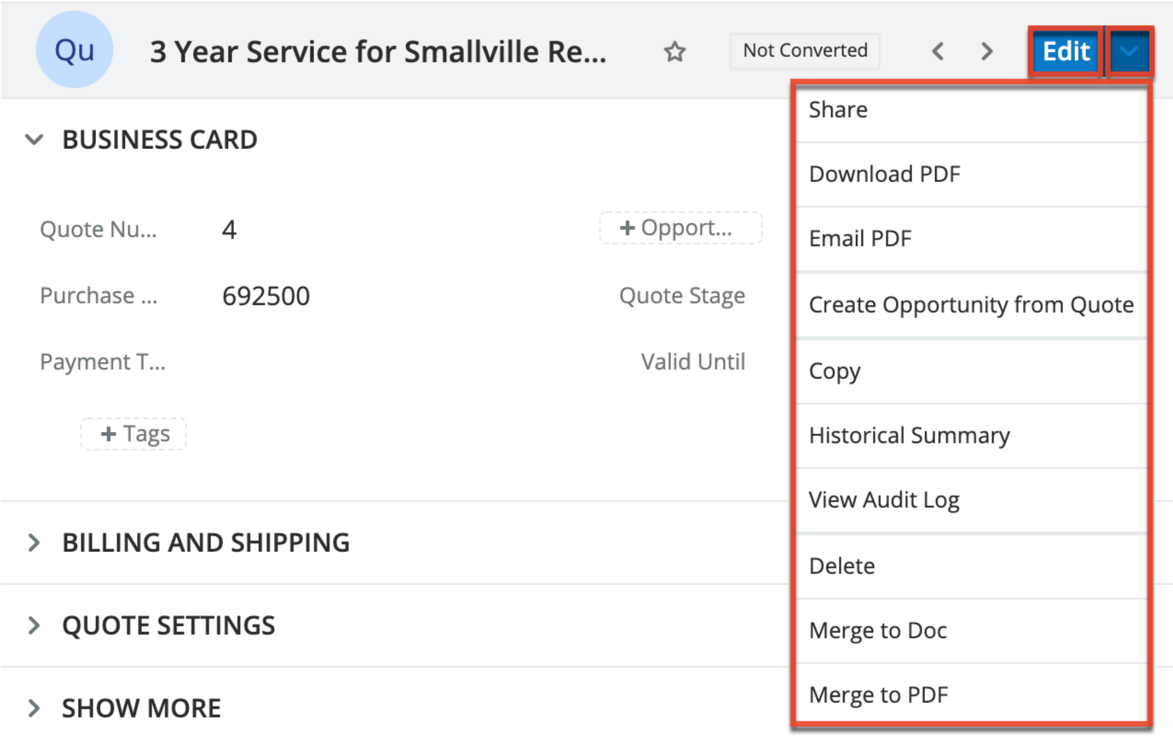


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this quote in the intelligence pane.
Edit	Edit this quote.
Delete	Delete this quote.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Quotes record view displays a single quote in full detail including its fields, quote worksheet, and subpanels of related records. To access a quote's record view, simply click a hyperlinked quote name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this quote.
Share	Share a link to this quote via email.
Download PDF	Download the quote to your computer as a PDF file. **Note**: Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.
Email PDF	Send an email with a PDF copy of the quote as an attachment. **Note**: Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates. To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Create Opportunity from Quote	Copy the details of this quote to a new opportunity record. **Note**: Quotes that are already "Converted" (as indicated by the badge adjacent to the quote's name in the

	example pictured here) cannot be re-converted into an opportunity. The "Create Opportunity from Quote" menu option will be grayed out when the quote's badge is Converted.
Copy	Duplicate this quote to create a new quote record. **Note**: The original quote's line items, groups, comments, and related account and opportunity data will carry over to the new quote.
Historical Summary	View a historical summary of activities (e.g., calls, meetings, etc.) related to this quote.
View Audit Log	View a record of changes to this quote.
Delete	Delete this quote.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to quotes.

General Instructions for Working With Sugar Modules	Quotes-Specific Instructions
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Quotes-specific help exists for each topic, use the links below to navigate to sections of the current page.
Creating Records	Building Quotes
Viewing Records	
Searching for Records	Filtering on Currency Fields

List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu Quote Worksheet Options and Menus
Intelligence Pane	Product Catalog Dashlet Product Catalog Quick Picks Dashlet
Editing Records	
Deleting Records	
Emailing Records	
Exporting Records	
Recalculating Calculated Values	
Finding Duplicate Records	
Viewing Record Historical Summaries	
Viewing Record Audit Logs	
Record PDFs	Downloading Quotes as PDFs
Favoriting Records	
Sharing Records	

Last Modified: 2022-05-16 20:24:14

Product Catalog

Overview

Sugar's Product Catalog and its supporting modules allow you to define, categorize, and organize a list of all products or services that your organization sells or supports. Products within the Product Catalog can be broadly classified into product types, such as Software and Hardware. Each product type can be further organized into several product categories. For example, the software product type can contain product categories such as Spreadsheets and Word Processors. You can also create sub-categories within a category. Users can define the details of their products within the following products-related modules:

Module	**Description**

Product Catalog	The list of products sold by your organization; used as a template for the Revenue Line Items, Quoted Line Items, and Purchased Line Items modules.
Product Categories	The categories by which products are organized in the Product Catalog.
Product Types	The Type dropdown list in the Product Catalog.
Manufacturers	The Manufacturer Name dropdown list in the Product Catalog.

This documentation will cover information and actions specific to the above modules. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting records, please refer to the Working With Records section of this page.

Please note that you will only be able to see product-related records as allowed by your license type, team membership, assigned roles, and user access type. For more information, please refer to the referenced documentation in the Administration Guide.

Product Catalog

Sugar's Product Catalog module contains a list of all products or services that your organization sells or supports. This module provides the Quoted Line Items, Revenue Line Items, and Purchased Line Items modules with the template used when creating products to be used for Opportunities, Quotes, and Purchases including pricing and cost information and information about the manufacturer.

Note: Depending on your license type, you may not have access to all modules (e.g., Sugar Serve users will not have access to Opportunities, Quotes, or Revenue Line Items). For more information on license types and the functionality available for each, refer to the User Management documentation.

Product Catalog Fields

The Product Catalog contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Fields can be altered, added, or removed via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration Guide.

Field	Description
Availability	Select if the item is in stock or not from the dropdown list.
Category Name	The product category to which the new item belongs.
Cost	The actual cost of the item. This will not appear on printed quotes.
Currency	The currency of the given prices (Cost, List, Unit).
Date Available	Select the date of availability if the item is out of stock.
Date Created	The date the product catalog record was created.
Date Modified	The date the product catalog record was last modified.
Date-Cost-Price	The starting date that the cost is valid.
Default Pricing Formula	Select a formula from the dropdown list to arrive at the discount price for the Unit Price field. The formulas are as follows: • **Fixed Price:** Allows you to enter a Unit Price without any calculation. • **Profit Margin:** Enter the points in the adjoining field to vary the percentage against the cost. • **Markup over Cost:** Choose a percentage to raise the price over the cost. • **Discount from List:** Enter the discount percentage from the List Price in the adjoining field. • **Same as List:** The Unit Price will be the same as the List

	Price.
Description	A description or other information about the product.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
List Price	The quotable list price of the product.
Lock Duration[1]	Available when the Service field is set to yes. When checked, the Service Duration field value cannot be changed by a user via a line item record (e.g., revenue line item).
Manufacturer Name	The manufacturer of the product.
Part Number	The manufacturer's part number for the product.
Product Name	The name of the product.
Product Type	The specified product type.
Product URL	The web address of the product if it is available online.
Quantity in Stock	Enter the number of units that are in stock of the product. **Note**: Negative values are supported in this field.
Renewable[1]	Activated when the Service field is set to yes, select whether or not the service offered can be renewed for additional time periods. When "Renewable" equals yes, it will trigger the renewal pipeline automation feature for Sugar Sell users.
Service[1]	Designate this product catalog record as a service. Enabling the Service field will make the Service Duration (required) and Renewable fields available.
Service Duration[1]	Required when the Service field is set to yes, set the period of time that this service covers. When the Renewable field is also set to yes, the Service Duration will determine the expected

	close date for future service opportunities.
Status	The status of the product and whether it is available by default to relate to records.
Support Contact	The support person's contact information, such as the phone number or email address.
Support Desc.	Brief description or other information regarding the support provided.
Support Name	The name of the Customer Support person.
Support Term	The term (e.g., six months, one year, etc.) in which support will be provided for the product.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Tax Class	Tax classification (e.g., taxable, non-taxable) for the product.
Teams	The Sugar team(s) assigned to the product catalog record.
Unit Price	The unit price of the product.
Vendor Part Number	The vendor's part number for the product.
Weight	The weight of the product. **Note**: Negative values are supported in this field.

[1] For more information on service-related fields in Sugar Sell, refer to the Services and Renewable Revenue Line Items section of the Opportunities documentation in the Application Guide.

Product Status

The Product Catalog module contains a Status field that controls the availability of each product catalog record when relating it to another record. By default, the Status field has three options: Active, Inactive, and Retired. When the status of a product record is "Active", it will be displayed in the Product Catalog and Product Catalog Quick Picks dashlets. Product Catalog relate fields are filtered to display records with a status of "Active". To select a record with a status of "Inactive" or "Retired", the filter can be removed via the Search and Select drawer.

Note: Sugar admin users can add or modify status values in Studio, but the Active status cannot be removed. For more information on editing dropdown values via the Dropdown Editor, please refer to the Editing Dropdown Lists section of the Developer Tools documentation.

Product Categories

The Product Categories module allows you to create categories to group records under a Product Type. This is one of the levels of organization you can use for the products and services that your organization offers, and will contain multiple entries from the product catalog.

Product Category Fields

The Product Category module contains four stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields.

Field	Description
Product Category	The category's name as it will appear on the Product Category dropdown list.
Parent Category	Select a parent product category if this product category is a sub-set of another category. **Note**: A record should not be selected as its own parent category.
Description	A description or other information about the product category.
Order	Enter a number to specify the order in which this category will appear in the Product Category dropdown list.

Ordering Product Categories

The Order field in the Product Categories module defines the order in which the categories appear in the Product Catalog dashlet. When viewing the dashlet, the product category records without a value in the Parent Category field will display in ascending order based on the numbers entered in the Order field. Product category records with a parent category defined will display as sub-folders in ascending order based on the numbers entered in the Order field. If multiple categories have the same order number, they will display in alphabetical order. Records with an empty Order value will display alphabetically after the final ordered record.

Product Types

The Product Types module controls the Type dropdown list in the Product Catalog fields. In addition to product categories, the product type allows you to define the classification of a product or service that is being offered on a product catalog record.

Product Type Fields

The Product Types module contains three stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields.

Field	**Description**
Product Type	The product type's name as it will appear on the Type dropdown list in the product catalog.
Description	A description or other information about the product type.
Order	Enter a number to specify the order in which this product type will appear in the Type dropdown list.

Ordering Product Types

The Order field in Product Types defines the order of the different type options when viewing the Type dropdown list of a Product Catalog record. The Order field allows you to organize what order the dropdown list will display, with 1 being the highest on the list and moving down as the order number rises. When creating new product type record options, the Order field will automatically increment to the next number in the list, thereby adding the new option to the bottom of the list. The Order field can be overwritten with another number if you would like to manually re-order the options.

Manufacturers

The Manufacturers module controls and maintains the Manufacturer Name field in the Product Catalog module. The Manufacturer Name field allows you to select from a list of the manufacturers you use to classify your products and specify from which manufacturer they are produced.

Manufacturer Fields

The Manufacturers module contains three stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The below definitions are suggested meanings for the fields.

Field	**Description**
Manufacturer	The manufacturer's name as it will appear in the Manufacturer Name field in the product catalog.
Status	Select "Active" or "Inactive" to indicate which manufacturers are displayed as options in the Manufacturer Name field.
Order	Enter a number to specify the order in which this category will appear in the Manufacturer Name field list.

Ordering Manufacturers

The Order field in the module defines the order in which the manufacturer options are displayed in the corresponding Manufacturer Name field of the Product Catalog module. Enter the numeric value (e.g., 1, 2, 3) in the manufacturer record's Order field to determine the order it will display in the corresponding field list (Manufacturer Name). For example, a manufacturer record with an order value of "1" will display at the top of the list followed by the next value (e.g., 2), and so forth. When creating new manufacturer records, the Order field will automatically increment to the next number in the list, thereby adding the new option to the bottom of the list. The Order field can be overwritten with another number if you would like to manually re-order the options.

Working With Products-Related Modules

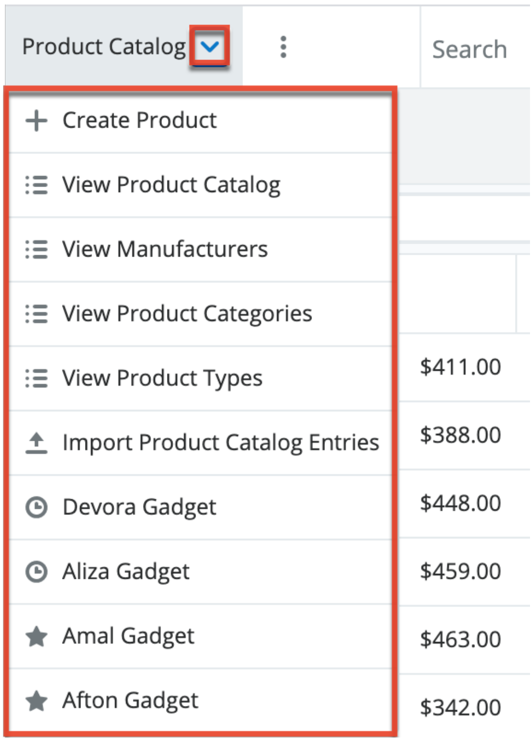
The Product Catalog and supporting modules use Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Menus

Sugar modules contain various options that are available via menus in the module tab, list view, and record view. The following sections present each menu type and its options with links to more information about each option in the User Interface documentation or, for module-specific functionality, within this page.

Module Tab Menus

The module tab is either displayed in the navigation bar or found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. Click the module name to access the module's list view or expand the module tab to display the Actions, Recently Viewed, and Favorites menus.



From the Product Catalog's module tab menu, you can also access the supporting modules of Manufacturers, Product Categories, and Product Types. By navigating to any of these modules, you can access their respective module tabs, which in turn will offer the option to return to any of the other supporting modules.

The Actions menus in the module tab for the Product Catalog and its supporting modules will allow you to perform the following operations:

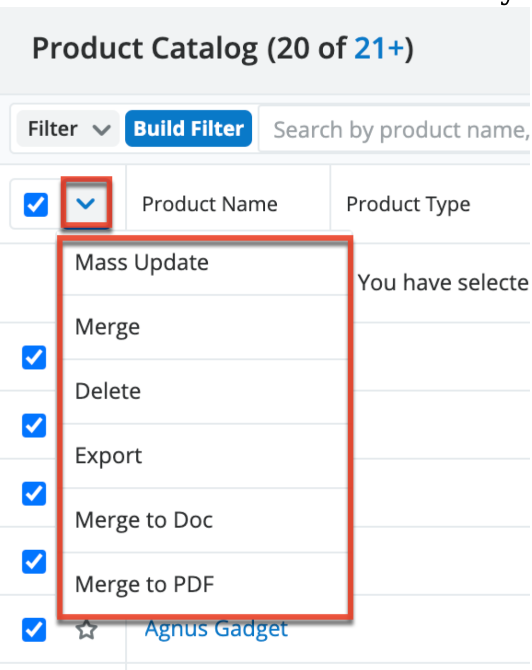
Menu Item	Description
Create [Record]	Opens the record view layout to create a new record in the module.
View Product Catalog	Opens the list view layout to search and display the product catalog.
View Manufacturers	Opens the Manufacturers list view.
View Product Categories	Opens the Product Categories list view.
View Product Types	Opens the Product Types list view.
Import [Records]	Opens the import wizard to create or update records in modules that support importing.

List View Menus

The list view displays all records meeting the current search criteria. You can view the basic details of each record within the field columns. Users with administrator or developer access have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation.

Mass Actions Menu

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



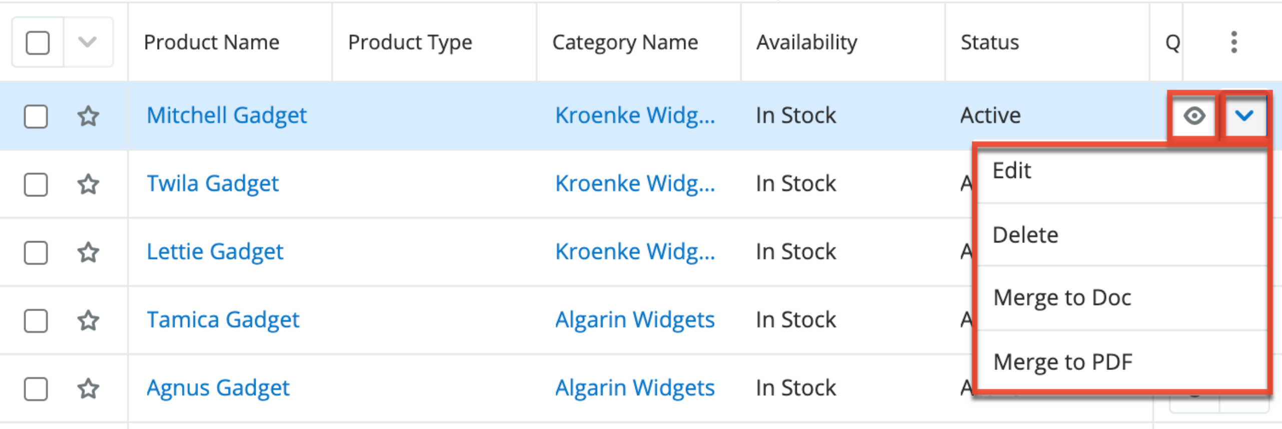
The options in the Mass Actions menu allow you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more records at a time.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Merge	Merge two or more duplicate records.
Delete	Delete one or more records at a time.
Export	Export one or more records to a CSV

	file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record Actions Menu

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



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

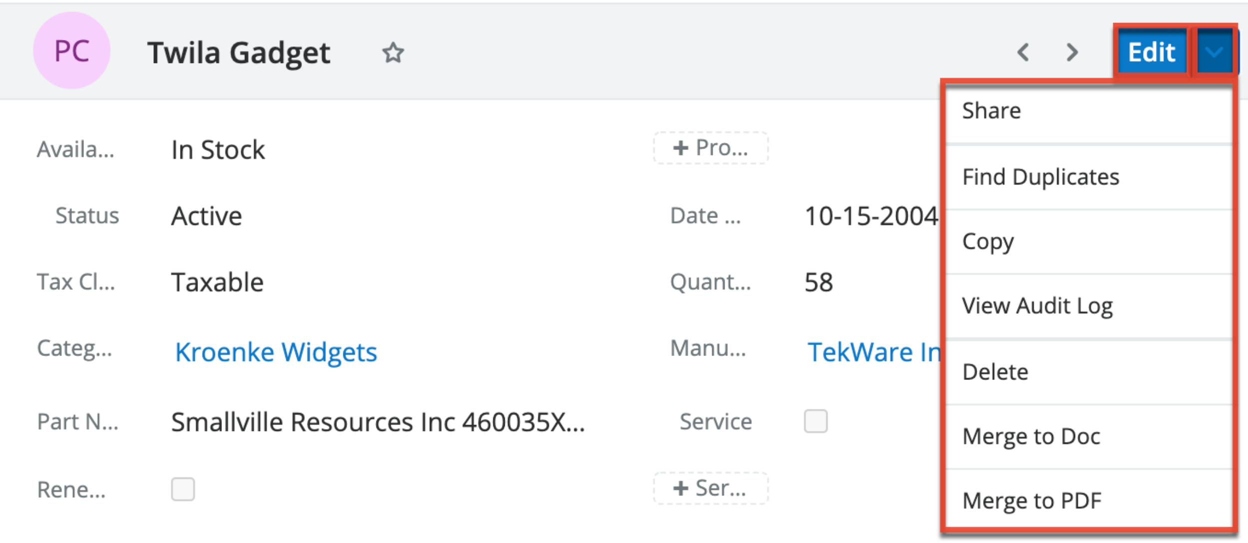
Menu Item	Description
Preview (Eye icon)	Preview this record in the intelligence pane.
Edit	Edit this record.
Delete	Delete this record.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF

	documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The record view displays thorough record information including all record fields. The record view can be reached by clicking a record's link in the list view. You have the ability to change the record view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation.

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



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

Menu Item	Description
[Edit](#)	Edit this record.
[Share](#)	Share a link to this record via email.
[Download PDF](#)	Download record information as a PDF file.
[Email PDF](#)	Email record information as a PDF attachment.
[Find Duplicates](#)	Locate potential duplicates of this record.
[Copy](#)	Duplicate this record.

View Audit Log	View a record of changes to this record.
Delete	Delete this record.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules.

Content Link	Description
Creating Records Basic Record Creation Creating via Subpanels Creating via Duplication Importing Records	The Creating Records section covers the various methods of creating new records, including via the Create button in the module, via the subpanel on related module records, duplication of an existing record, and importing a list of records into Sugar using a .csv spreadsheet.
Viewing Records Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Preview Viewing via Reports	The Viewing Records section describes the various methods of viewing records, including via the list view and record view, the Recently Viewed menu in the module tab, previewing records in the right-hand side panel, and reports displaying the record's data.
Searching for Records Global Search List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to the two searching methods for locating Sugar records: global search, which searches across all Sugar modules, and list view search, which searches and filters within the module.
List View	The List View section walks through the

Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview Record Actions Menu More Records Dashboards	many elements of the List View layout, which contains a filterable list of all records in the current module. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of the module overviews below.
Record View Favorite Designation Next or Previous Record Actions Menu Show More Dashboards	The Record View section walks through the many elements of the Record View layout, which contains detailed information about a single record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the record view are described in the Record View Actions Menu sections of the module overview sections below.
Editing Records Editing Inline Via Record View Editing Via Record View Editing Inline Via Subpanels Editing Inline Via List View Mass Editing Via List View	The Editing Records section describes the various methods of editing existing records, including inline via the record view, in full edit mode on the record view, inline via the subpanel on related module records, inline via the list view, and via the Mass Update option on the list view.
Deleting Records Deleting Via Record View Deleting Via List View Mass Deleting Via List View	The Deleting Records section describes the various methods of deleting unwanted records, including via the record view, an individual record's Actions menu on the list view, and the Mass Actions menu on the list view.
Exporting Records	The Exporting Records section provides an introduction to the export functionality, which allows you to download a list of records and all their data as a .csv file for use outside of

	Sugar (e.g., in Microsoft Excel).
Recalculating Calculated Values	The Recalculating Calculated Values section provides instructions on utilizing the Recalculate Values list view option to update calculated field values in the module if the administrator has changed the field's formula via Admin > Studio.
Finding Duplicate Records	The Finding Duplicate Records section provides instructions for locating duplicate records. If searching on matching fields (e.g., Name) identifies one or more duplicates, they can be merged into a single record.
Merging Records Merging Via List View	The Merging Records section provides instructions for merging duplicates, which combines field values and related records into a single record.
Favoriting Records Favoriting via List View Favoriting via Record View	The Favoriting Records section describes the various methods of marking records as favorites, including via the list view and record view. **Note**: You can only mark records as favorites via the Product Catalog module. Favoriting a product catalog record allows you to easily access the product from the list view, Product Catalog Quick Picks dashlet, the Product Catalog module tab, or from within the search and select drawer. For more information on the Product Catalog Quick Picks dashlet, please refer to the Opportunities or Quotes documentation.
Sharing Records	The Sharing Records section provides instructions for the Share record view option, which composes an email with a link to the record. If the recipient is logged into Sugar, clicking the link will bring them directly to the record view.

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Forecasts

Overview

Sugar's Forecasts module incorporates revenue line item records to build forecasting worksheets and predict sales. Users can work towards sales quotas at the individual, team, and sales organization level.

Before users 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 revenue line items as the current time period progresses. These users will commit total predictions for their personal sales based on the revenue line items they expect to close. For instructions specific to a sales representative's use of the module, please refer to the Sales Representatives section of this documentation.

Sales managers work with their own revenue line item records similarly to other sales representatives. In addition, they aggregate their reportees' committed forecast amounts to predict their total team's sales and work towards the team's quota for each time period. In order for a user to have a designated manager that aggregates their forecast amounts, they must have the manager selected in the Reports To field on their user record. 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 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.

The Forecasts module is not available for Sugar Serve users. For more information on license types and the functionality available for each type, refer to the User Management documentation.

Note: If your instance is configured to use opportunities alone without revenue line items, please refer to the Forecasts documentation in the Professional Application Guide. For more information about changing your opportunities model via Admin > Opportunities, please see the Opportunities Configuration documentation in the Administration Guide.

Forecast Fields

The Forecasts module contains the following fields which enable users to work with revenue line item records to forecast sales for a given time period. Users with administrator or developer access have the ability to enable fields for use in the Forecasts module via Admin > Forecasts. Many revenue line item fields are available to be added to the forecasting worksheet. For more information please refer to the Forecast Configuration documentation in the Administration Guide.

Field	**Description**
Account Name	The account to which the revenue line item belongs; cannot be in-line edited from the Forecasts module.
Best	The revenue line item's Best field representing the most optimistic total amount; automatically set to match Likely when Sales Stage is "Closed - Lost" or "Closed - Won".
Best (Adjusted)	For managers, the Best value with an optional, manual adjustment above or below your reportee's committed Best total and your own worksheet's Best total; reported to your manager as the Best value when committing your forecast.
Expected Close Date	The revenue line item's expected date of completion.
Forecast	The revenue line item's commit range (e.g., "Include", "Exclude", etc.) based on the revenue line item's initial probability and the user's edits; controls whether the revenue line item is counted in the forecast's totals and allows for filtering; automatically set to "Included" when Sales Stage is "Closed - Won" and "Excluded" when Sales Stage is "Closed - Lost".
Likely	The revenue line item's Likely field representing the most likely total

	amount.
Likely (Adjusted)	For managers, the Likely value with an optional, manual adjustment above or below your reportee's committed Likely total and your own worksheet's Likely total; reported to your manager as the Likely value when committing your forecast.
Opportunity Name	The revenue line item's related opportunity; cannot be in-line edited from the Forecasts module.
Probability	The revenue line item's current probability of being won. **Note**: This value is calculated based on the selected Sales Stage and cannot be edited.
Quota	For sales representatives, your individual quota for this sales time period as assigned by your manager. For managers, your quota for this sales time period as assigned by your manager.
Quota (Adjusted)	For mid-level managers, your team's quota with an optional, manual increase above your team's assigned quota; when assigning quota to your reportees, this is the quota value they will receive.
Revenue Line Item Name	The revenue line item's name; cannot be in-line edited from the Forecasts module.
Stage	The revenue line item's current sales stage.
Tags	User-created keywords or phrases used to find, group, and classify data by common attributes.
Worst	The revenue line item's Worst field representing the least optimistic total amount; automatically set to match Likely when Sales Stage is "Closed - Lost" or "Closed - Won".
Worst (Adjusted)	For managers, the Worst value with an

	optional, manual adjustment above or below your reportee's committed Worst total and your own worksheet's Worst total; reported to your manager as the Worst value when committing your forecast.

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.

For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

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 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 worksheet, to his or her own team worksheet. For managers viewing a team worksheet, the Commit button will be enabled after any committed change to his or her own worksheet or a reportee's worksheet.
Assign Quota	For managers, pushes quota changes to

	reportees' forecasting worksheets.
Export CSV	Exports the rows of the current forecasts worksheet.
Settings	For users with administrator access, opens the Forecast Configurations wizard.

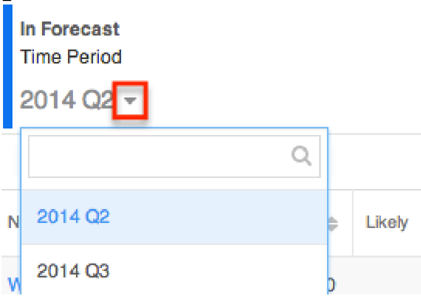
Sales Representatives

Sales representatives use the Forecasts module to work with their assigned revenue line items as the current time period progresses. These users will commit total predictions for their personal sales based on the revenue line items 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 revenue line items. Below your name, you will see a time period selection, summary and commit history, filter, and worksheet. On the right side of each page is an expandable Intelligence Pane which offers additional insight into your forecasting worksheet.

Time Periods

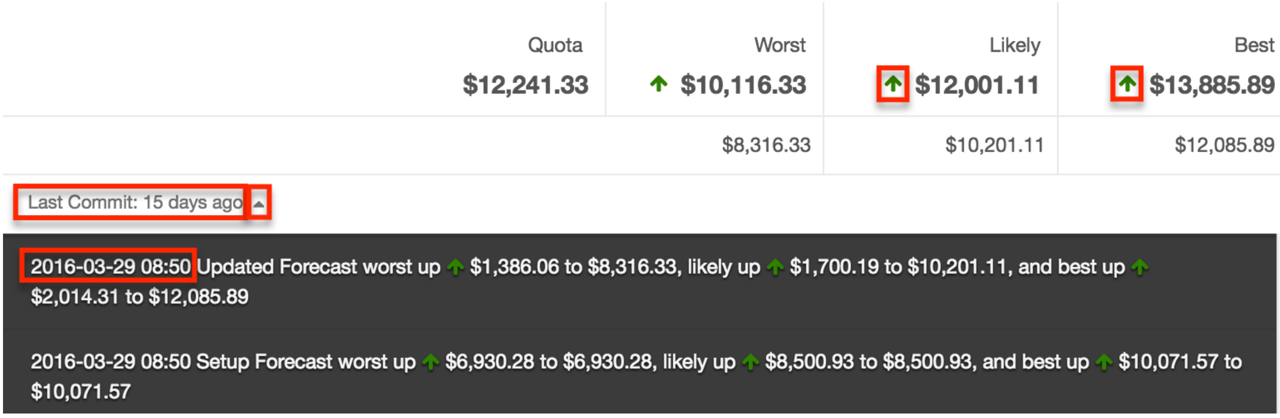
Below your name, you will see the current time period for which you are forecasting revenue line items to meet a quota. The length and the start date of this time period depend on the Time Periods configuration set up by your administrator. Clicking the arrow to the right of the current time period allows 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 revenue line items and forecast for those periods.



Summary and 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 worksheet's Quota, Likely, Best, and Worst predictions. The smaller numbers show your most recent commit's Likely, Best, and Worst 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.

Note: You may or may not see the Best and Worst options depending on how your administrator has configured the Forecasts module. By default, the Worst field is disabled and must be enabled by the administrator via Admin > Forecasts > Scenarios.

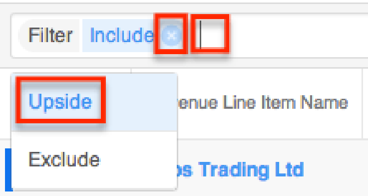


To the left of these summary numbers, you will see the date of your most recent commit. There will be no date shown if you have not yet committed for this time period. By clicking the arrow to the right of the latest commit date, a dark grey panel will appear showing the timestamp of the last commit with 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 revenue line items are displayed. By default, the "Include" filter will be active, meaning that only the revenue line items with a probability falling within the Include range specified during the administrator's Ranges configuration will be displayed. To add additional filters, click on the Filters bar and choose additional ranges. The filter(s) (e.g., Include, Exclude) added to the Filters bar will be preserved when you navigate away from the module. Returning to the Forecasts module will automatically display the revenue line items based on the filter(s) you last applied.

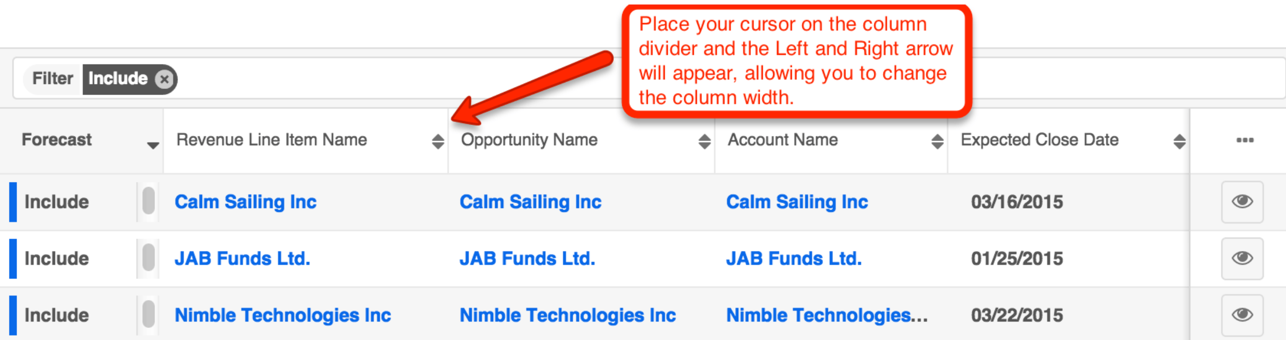
Please note the Upside and custom ranges may or may not be available depending on the administrator's Ranges configuration. To remove ranges from the filter, click the "x" for each filter name. Removing all filters will display all of your assigned revenue line items.



Column Resizing

You can easily adjust the size of columns in the forecasting worksheet based on your viewing preference. Simply place your cursor on the column divider, and when the left-and-right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies.

Note: Sugar enforces a minimum width for currency fields (e.g., Best, Likely, etc.) in list view columns which prevents the columns from being collapsed beyond this limit.

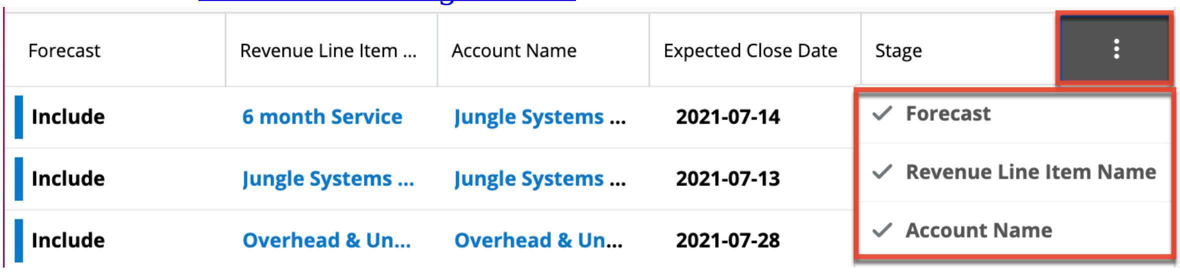


Column Sorting

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

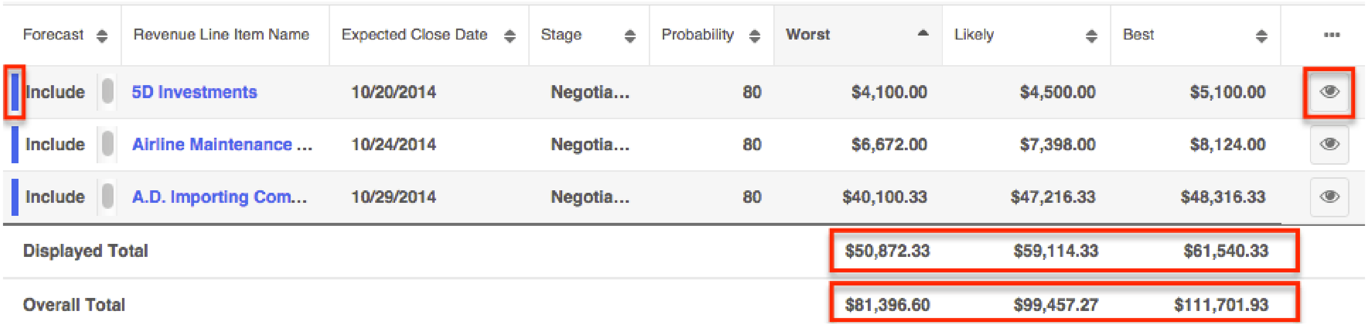
Column Selection

Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the three-dots menu to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column in your list view. Please note that administrators have the ability to configure what fields are available to display on the forecasting worksheet. For more information, please refer to the [Forecast Configuration]() documentation in the Administration Guide.



Line Items and Totals

Based on the chosen filters, you will see all or some of your assigned revenue line items for the currently selected time period listed below the Filters bar. On the far left of each row, a blue bar will appear to indicate whether or not the row's amounts are included in the totals for this time period. The presence of the blue bar indicates the row is being counted. In addition to the range called "Include", multiple forecast ranges may be counted towards your totals depending on how your administrator has configured forecast ranges for the instance. For more information about making more than one range included in totals, please refer to the [Forecast Configuration]() documentation in the Administration Guide. The range and thus the inclusion of each row can be [changed manually]() via this view. You can work directly with your revenue line item records by in-line [editing their probabilities and amounts]() from the Forecasts module or by clicking the Name field to open a record in the Revenue Line Items module where you can make additional edits. To the right of each row is a preview button which will allow you to view details about the revenue line item record in your intelligence pane.



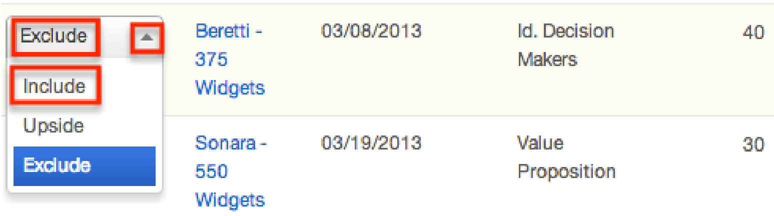
At the bottom of the list, the "Displayed Total" and "Overall Total" rows display sums of the Worst, Likely, and Best amount columns. The Displayed Total row shows the sum of the Worst, Likely, and Best amounts (both included and excluded) displayed on the worksheet based on the filters currently applied. The Overall Total row displays the totals (both included and excluded) of all revenue line items' amounts in this time period regardless of any filters currently applied.

Editing Forecast Inclusion

The first time a revenue line item is loaded to a worksheet, Sugar will assign it a category of either "Include", "Exclude", "Upside" (optional), or a custom range based on the Ranges configured by your administrator. The revenue line items 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. Your administrator may have chosen to use the Upside range or to create a number of other, custom ranges - each with their own non-overlapping range of probabilities. Custom ranges may also exist which have no association with probabilities.

Since one or more ranges may be considered as included depending on your administrators' configuration, the blue bars to the left of each row will update to reflect which items are included and which are excluded based on your updates to each's forecast range.

You may wish to alter the category automatically assigned to your revenue line items by these administrator-configured ranges especially as each revenue line item moves forward in the sales process and becomes more likely to be won. To do this, simply click on the revenue line item's current category in the Forecast column and choose the desired category from the dropdown menu.

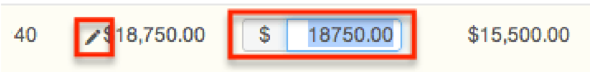


Changing a revenue line item's Forecast column to an included range such as "Include" will cause its Likely, Best, and Worst fields to be added to your totals while choosing an excluded range such as "Exclude" will remove the revenue line item's numbers from your totals. Changing which revenue line items are included on your worksheet requires you to save a draft or commit in order to preserved.

Note: All revenue line items in a Closed Won stage will be included in the worksheet and cannot have their Forecast column altered. All revenue line items in a Closed Lost stage will be excluded from the worksheet and cannot have their Forecast column altered.

Editing Revenue Line Item Fields

In addition to editing the inclusion, you can make in-line changes to each revenue line item's fields including Sales Stage, Likely, Best, and Worst. 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" and "Worst" depending on your administrator's Scenarios configuration.



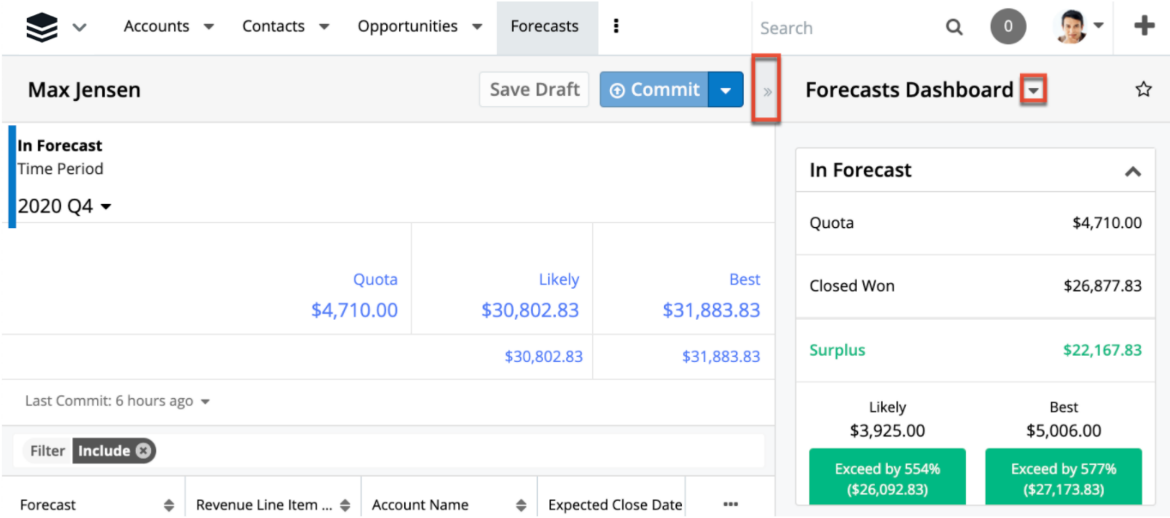
Clicking outside the text box or pressing Enter/Return will save your change to the line and update the worksheet's totals, summary, and Intelligence Pane. Clicking the Save Draft or Commit button will also update the revenue line item records themselves and make your changes visible when viewing the revenue line item in other places in Sugar. Saving a draft or committing is also required to preserve these changes to your worksheet and, in the case of committing, make the changes visible in your manager's Forecasts module.

Currency Support

If you use a currency different from your Sugar instance's default currency, your Likely, Best, and Worst amounts will be displayed in the system's default currency in the Forecasts module. Clicking to edit these amount values will, however, display and allow for editing in your chosen currency.

Intelligence Pane

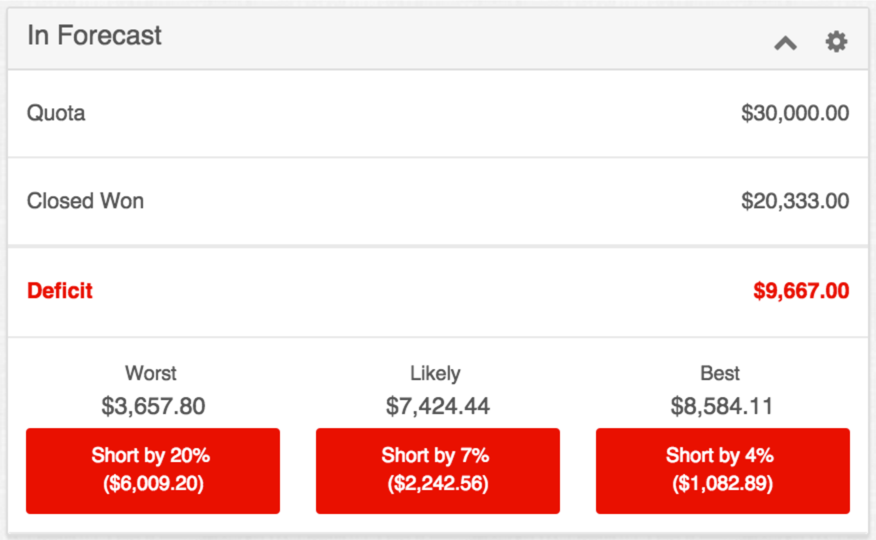
To the right of the forecasting worksheet, you will find an expandable intelligence pane which provides additional insights for planning and forecasting. If the pane is hidden, click the double-arrow button to expand it. Clicking the button again will hide it when you wish to see your worksheet at full width. The out-of-the-box default dashboard, "Forecasts Dashboard", contains two default dashlets which help provide additional insight into your forecasting worksheet, the In Forecast and Forecast Bar Chart dashlets. You can click the floating actions button on the intelligence pane to access the available options (e.g., Create Dashboard) in the floating actions menu. For more information on using dashboards, refer to the Dashboards and Dashlets documentation.



In Forecast Dashlet

The In Forecast dashlet appears at the top of the Intelligence Pane and gives a breakdown of how your revenue line items match up to your quota. Keep in mind that your In Forecast dashlet may or may not include "Best" and "Worst" depending on your administrator's Scenarios configuration.

Note: The In Forecast dashlet is not available for Sugar Serve users. For more information on license types and the functionality available for each type, refer to the User Management documentation.



The In Forecast dashlet's values are calculated based on the most recent updates to your worksheet even if the changes have not yet been saved as a draft or committed. The values take all of your revenue line items 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.
Closed Won	The total amount of your Closed Won revenue line items.
Deficit	The difference between your quota and the total amount of your Closed Won revenue line items; the additional revenue needed to be won in order to meet your quota.
Likely	The total of the Likely amounts for the included revenue line items which are not yet Closed Won.
(Likely Colored Box)	When summing your Closed Won amounts and your Likely amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota.
Best	(Optional) The total of the Best amounts for the included revenue line items which are not yet Closed Won.

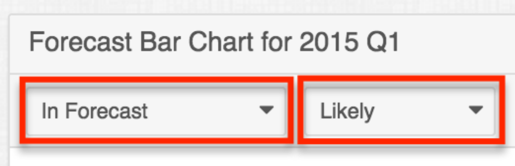
(Best Colored Box)	(Optional) When summing your Closed Won amounts and your Best amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota.
Worst	(Optional) The total of the Worst amounts for the included revenue line items which are not yet Closed Won.
(Worst Colored Box)	(Optional) When summing your Closed Won amounts and your Worst amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota.

Forecast Bar Chart Dashlet

The Forecast Bar Chart appears on the bottom of the Intelligence Pane and provides a configurable chart showing different cuts of your forecasting data over the course of the selected time period. Each revenue line item's Expected Close Date field determines in which sub-period it appears. Only the revenue line items currently appearing on your worksheet will appear in your chart meaning that the chart respects your current filters. The Forecast Bar Chart dashlet's values are calculated based on the most recent updates to your worksheet even if the changes have not yet been saved as a draft or committed. 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.

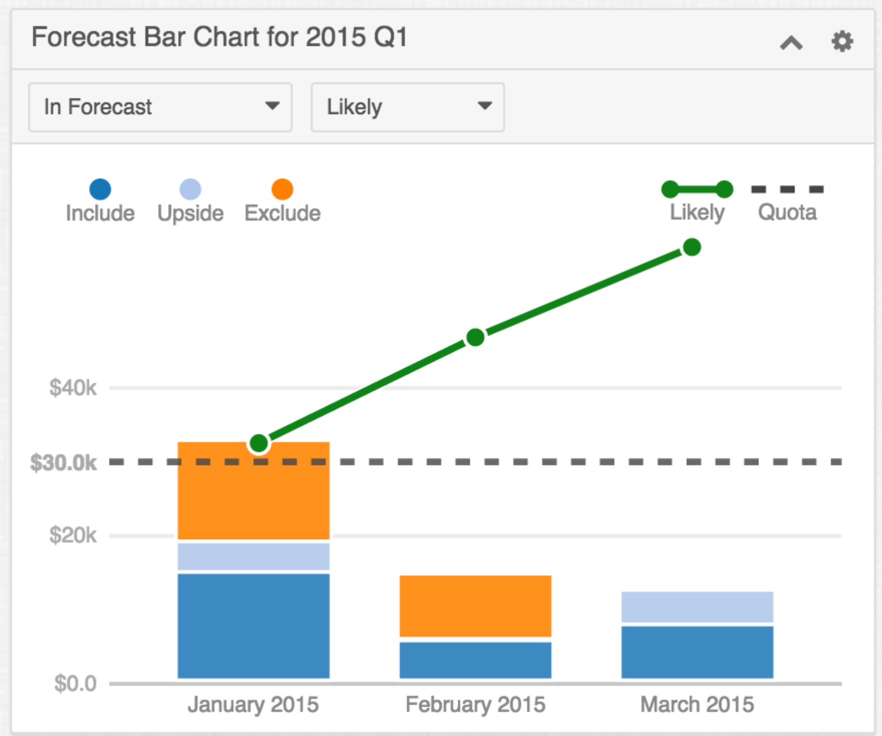
Note: The Forecast Bar Chart dashlet is not available for Sugar Serve users. For more information on license types and the functionality available for each, refer to the User Management documentation.

Use the two dropdown menus to control what is displayed in the chart.



When "Likely" is chosen, each green point represents the total Likely amounts for all revenue line items currently appearing in your filtered worksheet for that sub-period and any previous sub-periods falling within the selected time period. Choosing "Best" or "Worst" shows the same points using the revenue line items' Best or Worst amounts instead. A green line connects these points showing the change in your possible cumulative amounts.

Each sub-period also displays bars which represent the Likely, Best, or Worst amounts (depending on the chosen dropdown option) for the revenue line items currently appearing in your filtered worksheet. Choosing "In Forecast" will color code segments of these bars according to each revenue line item's Forecast field (i.e., "Include", "Exclude", etc). Choosing "Sales Stage" will color code the bars according to the Stage field of each revenue line item. Choosing "Probability" will color code the bars according to the Probability field of each revenue line item.



Note: You may or may not see "Best" and "Worst" as options in the second dropdown depending on your administrator's Scenarios configuration.

Sales Managers

Sales managers work with their own revenue line item records similarly to other sales representatives. In addition, they aggregate their reportees' committed forecast amounts to predict their total team's sales and work towards the team's quota for each time period. The Reports To field on the user record specifies a user's manager; this relationship is what determines who a sales representative reports to and, conversely, who a sales manager's reportees are.

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 worksheet, your team worksheet, and your reportees' worksheets hierarchically. While working with your personal worksheet works similarly to how a regular sales representative works with their revenue line item, 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.

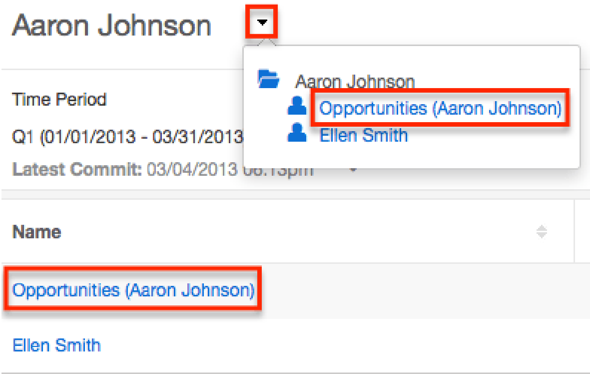
Note: Only administrators can edit the Reports To field. For more information on the field and how it is used in Sugar, refer to the User Management documentation.

Forecast Drilldown

Because sales managers are able to see and work with their reportees' revenue line items 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' revenue line items. 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 Line Items

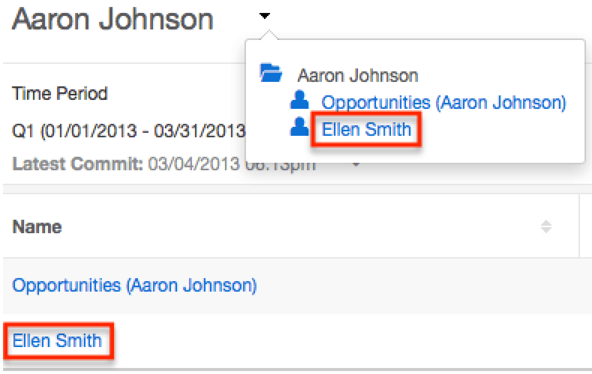
As a manager, Aaron can see and work with his own revenue line items by selecting "Aaron Johnson (me)" from the menu next to his name or from the Name column in his team worksheet below.



While working with his own revenue line items, he will have the same options on his worksheet as a regular sales representative has. For more information on working with a manager's forecasting worksheet, please refer to the Line Items and Totals section of this documentation. Aaron will need to commit his new revenue line items or changes to his revenue line items on his worksheet before the amounts will be reflected on his team worksheet.

Reportee's Line Items

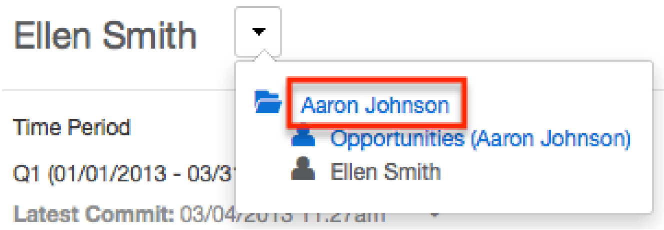
Since Aaron is Ellen's manager, Aaron also has the ability to work with Ellen's committed forecast and revenue line items. He can navigate to her committed worksheet by selecting "Ellen Smith" from the menu next to his name or from the Name column in his team worksheet below.



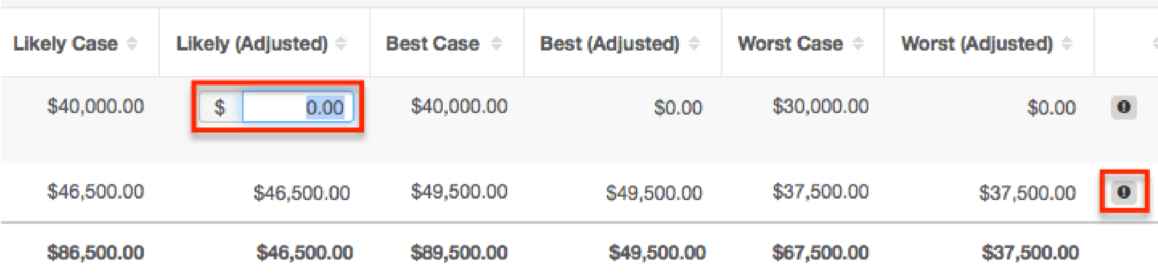
While viewing his reportee's worksheet, Aaron will not be able to edit any of the revenue line items' amounts or probabilities. He is able to filter for various ranges, change the time period, and view Ellen's summary and commit history for each time period.

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 amounts. Please note that your worksheets may or may not include "Best" and "Worst" 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 reportees' worksheets.



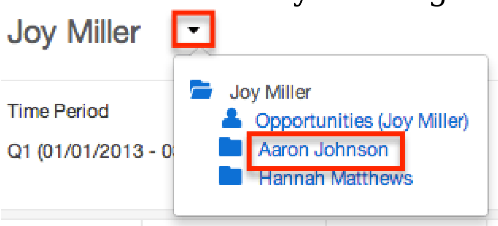
Likely Case	Likely (Adjusted)	Best Case	Best (Adjusted)	Worst Case	Worst (Adjusted)	
$40,000.00	$ 0.00	$40,000.00	$0.00	$30,000.00	$0.00	
$46,500.00	$46,500.00	$49,500.00	$49,500.00	$37,500.00	$37,500.00	
$86,500.00	$46,500.00	$89,500.00	$49,500.00	$67,500.00	$37,500.00	

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.

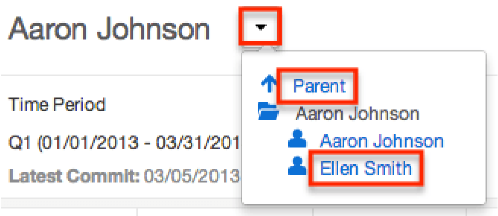
Note: Although it is possible for Aaron to set or alter his own personal quota, it is recommended that intermediate managers not make changes to their personal quota. Rather, Aaron's manager, Joy, should set the quota for his entire team from her team worksheet.

Management Hierarchy

The ability to drill into a reportee's team worksheet and revenue line items 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 revenue line items by clicking her own name, Aaron's team worksheet by clicking his name, or her other reportee's team worksheet.

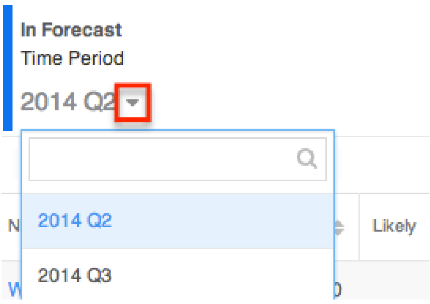


When Joy navigates to her reportee Aaron's team worksheet, Aaron's name now appears and his team worksheet is displayed in read-only mode. Joy can further drill down to see the worksheets of Aaron's team's members in read-only mode. This drilling can continue recursively down through the management chain as needed. Clicking "Parent" will move up one level of the hierarchy, bringing Joy back to her own team worksheet.



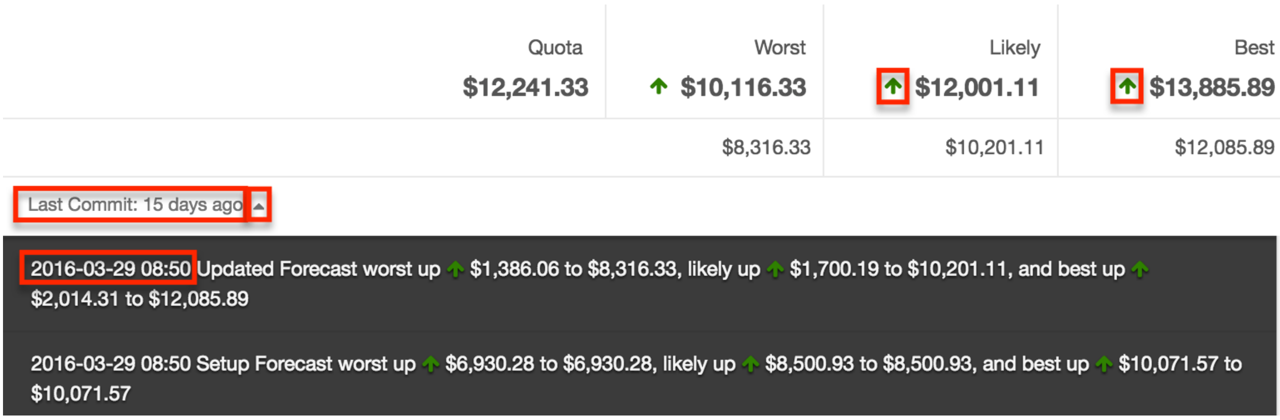
Time Periods

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 the start date of this time period depend 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 revenue line items and forecast for those periods.



Summary and 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 your current worksheet's Quota, Likely, Best, and Worst predictions. The smaller numbers show your most recent commit's Likely, Best, and Worst predictions. Any red or green arrows next to the large numbers on a manager's personal 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 and Worst depending on your administrator's [Scenarios](#) configuration.

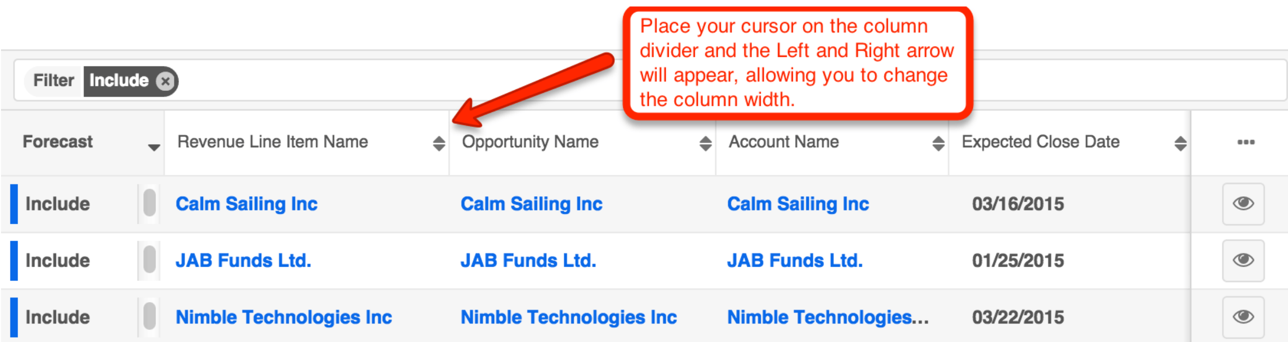


To the left of these summary numbers, you will see the date of the most recent commit. On a manager's personal worksheet and own team's worksheet, there will be no date shown if you have not yet committed for this time period. By clicking the arrow to the right of the latest commit date, a dark grey panel will appear showing the timestamp of the last commit with 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.

Column Resizing

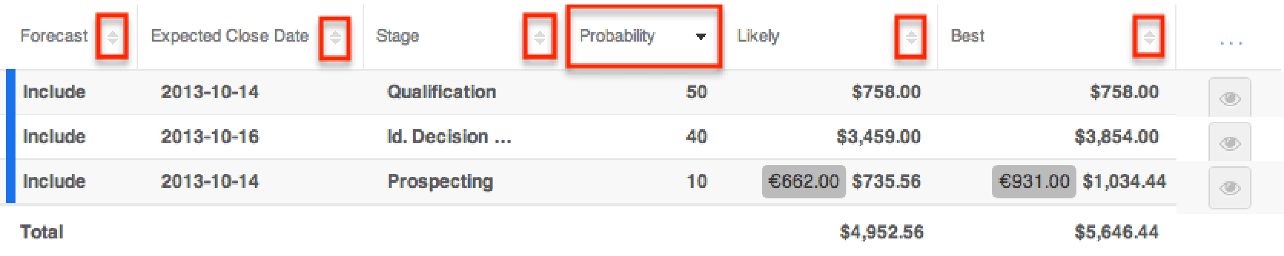
You can easily adjust the size of columns in the forecasting worksheet based on your viewing preference. Simply place your cursor on the column divider, and when the left-and-right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies.

Note: Sugar enforces a minimum width for currency fields (e.g., Best, Likely, etc.) in list view columns which prevents the columns from being collapsed beyond this limit.



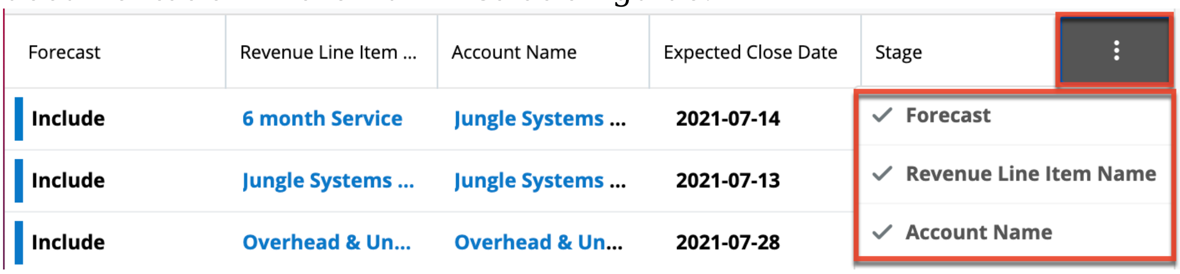
Column Sorting

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



Column Selection

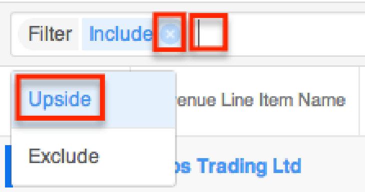
Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the three-dots menu to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it is included as a column in your list view. Please note that administrators have the ability to configure what fields are available to display in the list view via Admin > Studio. For more information on configuring fields to display in the list view, please refer to the Studio documentation in the Administration guide.



Filters

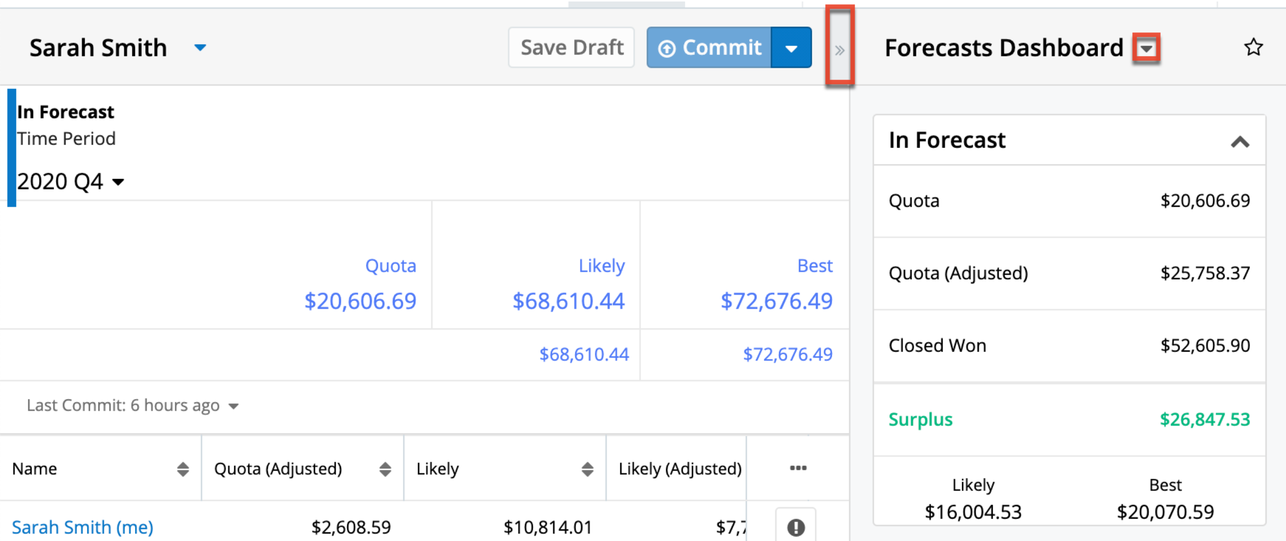
Below the summary and commit history of each worksheet, managers will see a filter bar which controls what kinds of revenue line items are displayed. By default, the "Include" filter will be active, meaning that only the revenue line items with a probability falling within the Include range specified during the administrator's Ranges configuration will be displayed. To add additional filters, click on the Filters bar and choose additional ranges. The filter(s) (e.g., Include, Exclude) added to the Filter bar will be preserved when you navigate away from the module. Returning to the Forecasts module will automatically display the revenue line items based on the filter(s) you last applied.

Please note the Upside or custom ranges may or may not be available depending on the administrator's Ranges configuration. To remove ranges from the filter, click the "x" for each filter name. Removing all filters will display all of your assigned revenue line items. Please note that when viewing your reportee's worksheets, only the revenue line items they have committed as included will be visible.



Intelligence Pane

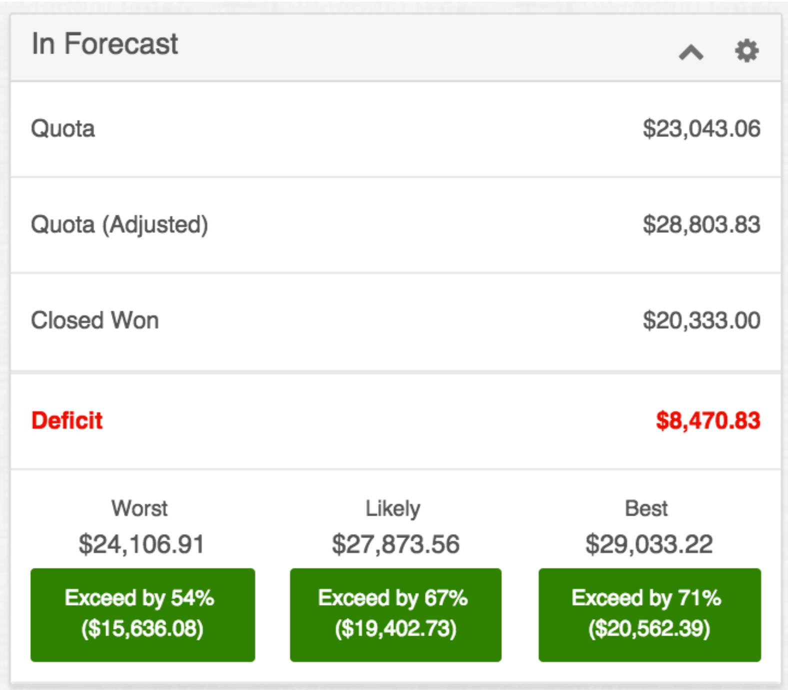
To the right of the forecasting worksheet, you will find an expandable Intelligence Pane which provides additional insights for planning and forecasting. If the pane is hidden, click the double-arrow button to expand it. Clicking the button again will hide it when you wish to see your worksheets at full width. The out-of-the-box default dashboard, Forecasts Dashboard, contains two default dashlets which help provide additional insight into your forecasting worksheet, the In Forecast and Forecast Bar Chart dashlets. You can click the floating actions button on the intelligence pane to access the available options (e.g., Create Dashboard) in the floating actions menu. For more information about using dashboards, refer to the Dashboards and Dashlets documentation.



In Forecast Dashlet

The In Forecast dashlet appears at the top of the Intelligence Pane and gives a breakdown of how your team's revenue line items match up to your quota. Please keep in mind that the In Forecast dashlet may or may not include "Best" and "Worst" depending on your administrator's Scenarios configuration.

Note: The In Forecast dashlet is not available for Sugar Serve users. For more information on license types and the functionality available for each, refer to the User Management documentation.



The In Forecast dashlet's values are calculated based on the most recent updates to the worksheet even if the changes have not yet been saved as a draft or committed. The values take all of your and your team's revenue line items into account regardless of any filters currently being used in your worksheet. Their meanings are as follows:

Field	**Description**
Quota	Your team's quota for this sales time period as assigned by your manager.
Quota (Adjusted)	For mid-level managers, your team's quota with an optional, manual increase above your team's assigned quota; when assigning quota to your reportees, this is the quota value they will receive.
Closed Won	The total amount of your team's Closed Won revenue line items.

Deficit	The difference between your team's adjusted quota and the total amount of your team's Closed Won revenue line items; the additional revenue needed to be won in order to meet your adjusted quota.
Likely	The total of the Likely amounts for the included revenue line items which are not yet Closed Won.
(Likely Colored Box)	When summing your team's Closed Won amounts and Likely amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota.
Best	(Optional) The total of the Best amounts for the included revenue line items which are not yet Closed Won.
(Best Colored Box)	(Optional) When summing your team's Closed Won amounts and Best amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota.
Worst	(Optional) The total of the Worst amounts for the included revenue line items which are not yet Closed Won.
(Worst Colored Box)	(Optional) When summing your team's Closed Won amounts and Worst amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota.

When drilled into your own or a reportee's forecasting worksheet, the Quota (Adjusted) row will not be displayed and the dashlet will function as it does for sales representatives without reportees. For more information on the meanings and configuration of the table while viewing you or a reportee's worksheet, please refer to the In Forecast dashlet section within the Sales Representatives section of this documentation.

Forecast Bar Chart Dashlet

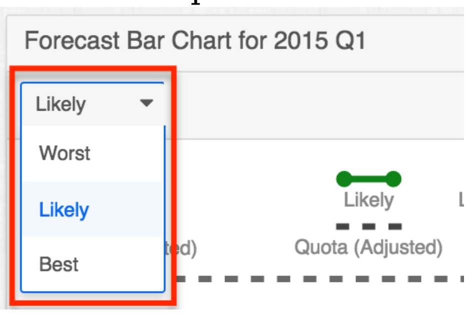
The Forecast Bar Chart appears on the bottom of the Intelligence Pane and provides a configurable chart showing different cuts of your team members' forecasting data. Throughout all chart configurations, the dotted black line represents your adjusted quota for the given time period and can be hovered over to view the quota amount.

Note: The Forecast Bar Chart dashlet is not available for Sugar Serve users. For more information on license types and the functionality available for each type, refer to the User Management documentation.

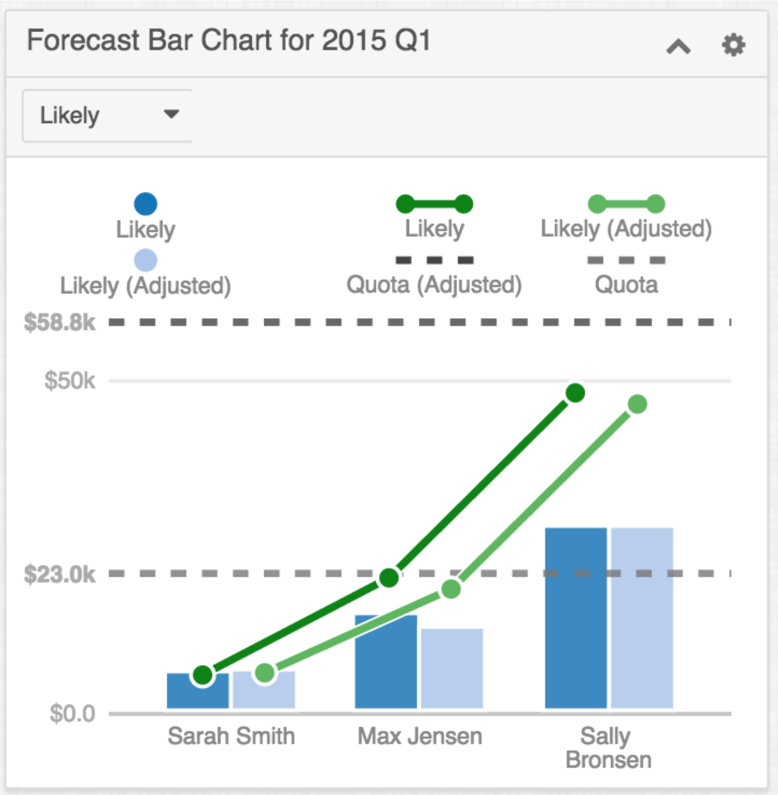
While viewing your or a reportee's worksheet, the charts will display the relevant revenue line items over the course of the selected time period. In these views, the charts function in the same way as they do for support representatives without reportees. For more information on the meanings and configuration of the chart while viewing your or a reportee's worksheet, please refer to the Forecast Bar 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 by user. Throughout all chart configurations, the dotted black line represents the worksheet's adjusted quota for the given time period and can be hovered over to view the quota amount.

Use the dropdown menu to configure what is displayed in the chart.



When "Likely" is chosen, each dark blue bar represents the total committed Likely amount for each user within the current team worksheet. Each light blue bar represents the total adjusted Likely amounts for each user. The dark green dots show the cumulative Likely total of the team built user-by-user from left to right with the rightmost point representing the total Likely amount for the entire team. The light green dots and line do the same using the adjusted Likely team total.

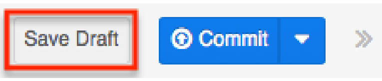


Choosing "Best" shows similar chart elements except that the Best and adjusted Best amounts are used. Choosing "Worst" does the same with Worst and adjusted Worst amounts.

Note: You may or may not see "Best" and "Worst" as options in the second dropdown depending on your administrator's Scenarios configuration.

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 revenue line items' amounts and/or probability to alter the revenue line item record itself, making these new numbers visible on the revenue line item in other areas of Sugar.



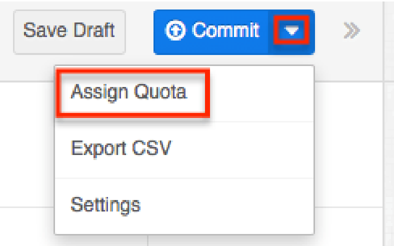
Committing Forecasts

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 worksheet. Clicking "Commit" will also cause any changes to your personal revenue line item' amounts and/or probability to alter the revenue line item record itself, making these new numbers visible on the revenue line item in other areas of Sugar.

For sales managers, changes to your reportees' quotas will appear in their Forecasts module when you perform a commit or when using the Assign Quota option. Either action will also update your quota and your reportees' quotas in the In Forecasts dashlet.

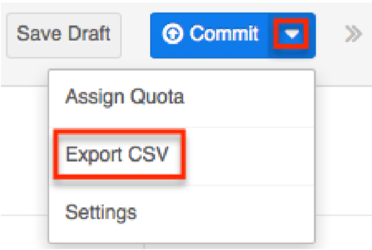
Assigning Quotas

After a manager makes changes to the quotas for his or her reportees, the new quota will become visible in the reportee's Forecasts module when the manager clicks Assign Quota from the Actions menu in addition to when they commit their forecast. Either action will also cause changes to your quota and your reportees' quotas to be reflected inthe In Forecasts dashlet.



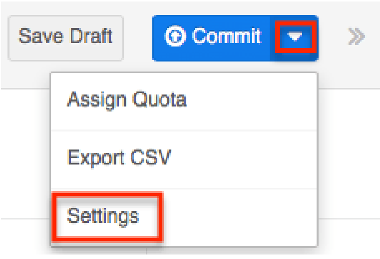
Exporting Forecasts

The Export option is available on every forecasting page and exports every line of the current worksheet. 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.



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Contracts

Overview

Sugar's Contracts module consists of individual business arrangements your organization has with vendors, customers, or associations. 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 module. Each contract record may then relate to other Sugar records such as opportunities, documents, quotes, and many others. This documentation will cover the basics of the Contracts module as well as the various options available in performing the actions related to the module. For instructions concerning views and actions that are common across most Sugar modules, such as creating, editing, and deleting contract records, please refer to the Working With Sugar Modules section of this page.

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 documentation in the Administration Guide.

Note: By default, the Contracts module is hidden in Sugar and the system administrator must enable the module via Admin > Display Modules and Subpanels. For more information on displaying modules in Sugar, please refer to the Developer Tools documentation in the Administration Guide.

Contract Fields

The Contracts module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. 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.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
Company Signed Date	Date when 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.
Customer Signed Date	Date when 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 when 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.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
Opportunity Name	The opportunity, from which the contract originated or is related, if any.
Reference Code	The internal designation used to refer to this contract.
Start Date	Date when this contract takes effect.
Status	The current status of the contract (e.g., Not Started, In Progress, Signed).
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the contract record.
Type Name	The contract type assigned to the record. **Note**: Contract types can be created and managed via Admin > Contract

	Types.

Working With Sugar Modules

The Contracts module uses Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Contract Menus

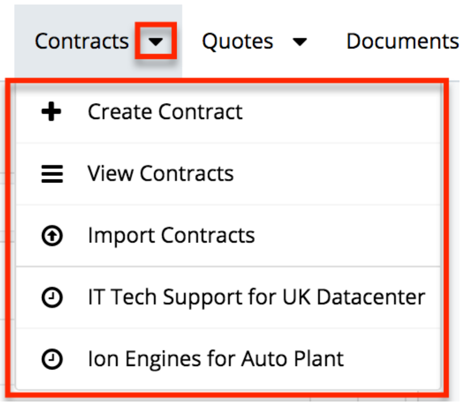
The Contracts module contains various options and functionality that are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Contracts-specific functionality, within this page.

Module Tab Menus

The Contracts 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 with the remaining displayed modules 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.

Note: By default, the Contracts module is hidden in Sugar and the system administrator must enable the module via Admin > Display Modules and Subpanels. For more information on displaying modules in Sugar, please refer to the Developer Tools documentation in the Administration Guide.

Click the tab to access the Contracts list view. You may also click the triangle in the Contracts module tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important operations within the module. The Recently Viewed menu displays the list of contracts you most recently viewed. The Favorites menu displays the list of contracts you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Contract	Opens the record 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.

By default, the Contracts module is hidden in Sugar and the system administrator must enable the module via Admin > Display Modules and Subpanels. For more information on displaying modules in Sugar, please refer to the Developer Tools documentation in the Administration Guide. For more information on module tab menus including other reasons a module may not be included in the menu, see the User Interface documentation.

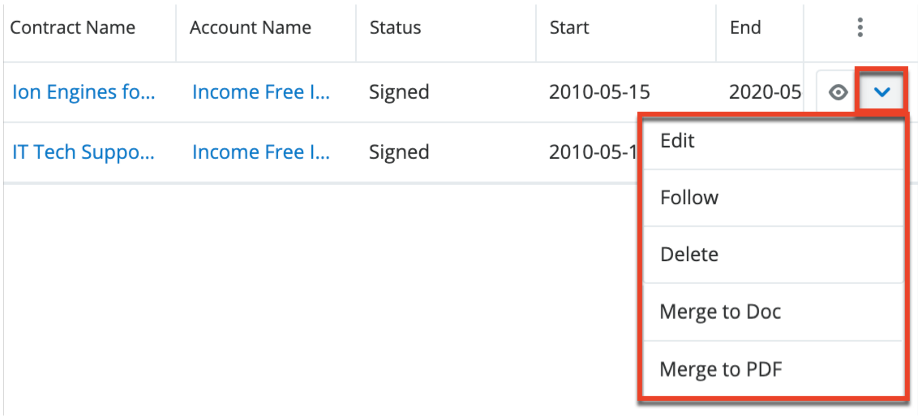
List View Menus

The Contracts list view displays all contract records and allows for searching and filtering to locate specific contracts. You can view the basic details of each record within the field columns of the list view or click on a contract's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual contract directly from the list view.

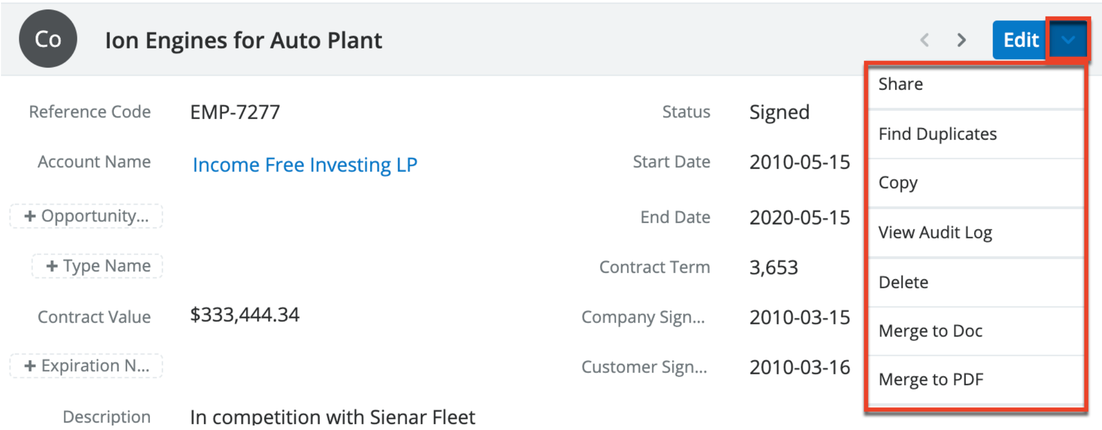


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this contract in the intelligence pane.
Edit	Edit this contract.
Follow	Follow this contract.
Delete	Delete this contract.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Contracts record view displays a single contract in full detail including its fields, subpanels of related records, and activity stream. To access a contract's record view, simply click a hyperlinked contract name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this contract record.
Share	Share a link to this contract via email. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Download PDF	Download the record's information as a PDF file. • This menu option is only visible if the administrator has created a PDF template for the Contracts module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.
Email PDF	Email the record's information as a PDF attachment. • This menu option is only visible if the administrator has created a PDF template for the Contracts module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to

	reveal or hide the available PDF templates. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Find Duplicates	Locate potential duplicates of this contract record.
Copy	Duplicate this record to create a new contract.
View Audit Log	View a record of changes to this contract record.
Delete	Delete this contract.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to contracts.

General Instructions for Working With Sugar Modules	Contracts-Specific Instructions
Use the links below to navigate to the User Interface page that covers topics generic to many Sugar modules.	When Contracts-specific help exists for each topic, use the links below to navigate to sections of the current page.
Creating Records	
Viewing Records	
Searching for Records	

List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	
Editing Records	
Deleting Records	
Exporting Records	
Recalculating Calculated Values	
Finding Duplicate Records	
Merging Records	
Viewing Record Audit Logs	
Record PDFs	
Favoriting Records	
Following Records	
Sharing Records	

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Documents

Overview

Sugar's Documents module gives your users a way to access and update company-specific files. You can create a library of documents and graphics that you can share with other users and contacts, ranging from marketing collateral, contracts, internal policies, and 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 record view. Each document record may then relate to other Sugar records such as accounts, contacts, and many others. This documentation will cover information and actions specific to the Documents module. For instructions concerning views and actions that are common across most Sugar modules, such as creating, editing, and deleting documents, please refer to the Working With Sugar Modules section of this page.

Document Fields

The Documents module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role 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.).
Expiration Date	The date the Document expires.
File Name	Click "Choose File" to navigate to the location to upload a Document.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
Is a Template	Classifies a Document as a template. **Note**: This is a legacy field that was previously used in conjunction with deprecated functionality.
Last Revision Create Date	The date the last revision related to the document record was created.

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.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the document record.

Documents and Google Drive

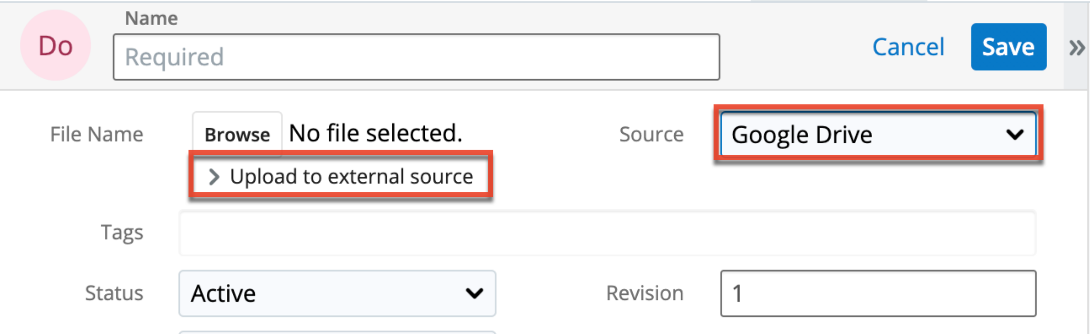
Sugar comes with Google Docs (Google Drive) integration by default. In order to be able to create a document in Sugar from a Google doc in your Google Drive you will first need to link your Google account with your user profile in Sugar. For more information on setting up external accounts in your user profile, please refer to the Getting Started documentation.

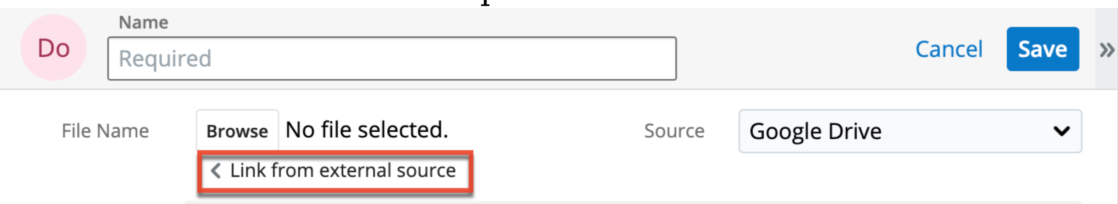
Creating via Google Drive

Users have the ability to create a Sugar document linked to a document stored in their Google Drive or Google Docs. In addition, you can upload documents from your local computer to these external sources (e.g., Google Drive).

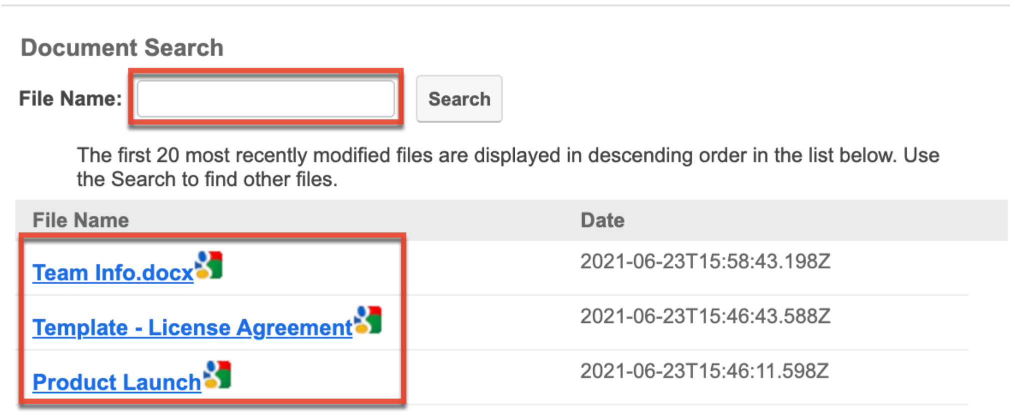
Use the following steps to create a Sugar document linked to a document stored in

Google Drive via the Documents module:

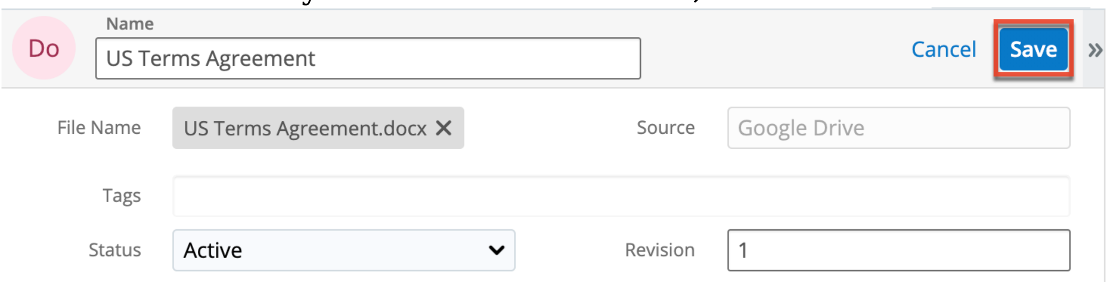
1. Click the triangle in the Documents module tab to open the actions menu and select "Create Document".
2. Select "Google Drive" in the Source field, and the External Source option will appear below the File Name field's Browse button.


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 Getting Started documentation
3. To upload documents to Google Drive, click the Browse button in the File Name field to select a file from your local computer. For more information on supported file types, please refer to this Google Drive help article on the Google Help website.
4. Alternatively, you can link Google Drive documents to the Documents module by toggling the "Upload to external source" option to reveal the "Link from external source" option.


5. Click the Browse button in the File Name field, and a pop-up window will appear showing 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 from all folders in your drive.
6. Use the Search box to locate a specific document then select the document by clicking on the document's file name.



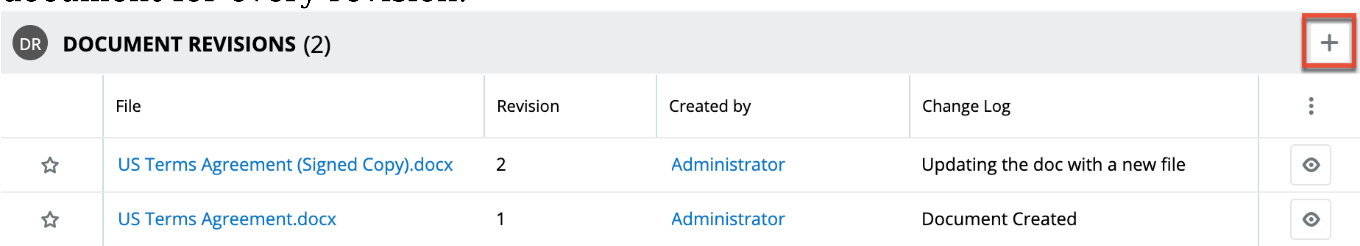
7. Enter appropriate values for the remaining [fields](#) in the record view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
8. Once the necessary information is entered, click "Save".



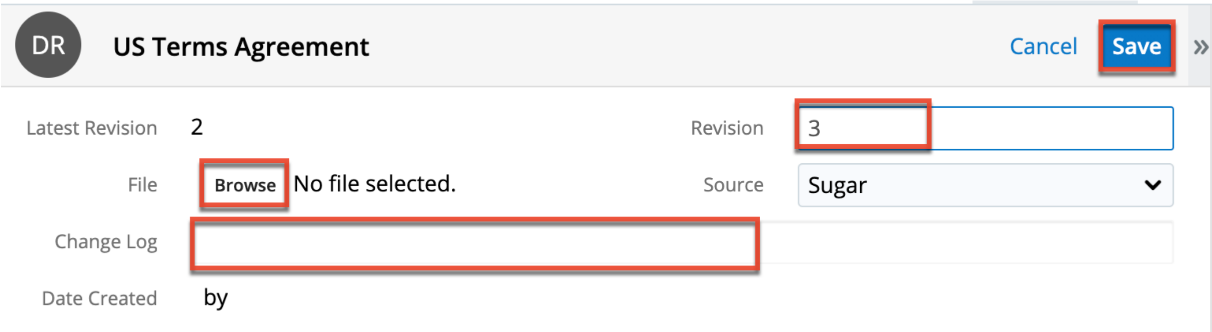
Note: Documents that link to an external account (e.g., Google Docs, IBM Smart Cloud) cannot be used as attachments in emails composed through the Sugar Email Client.

Document Revisions

Users can easily revise documents in Sugar by creating revision records via the Document Revisions subpanel. The subpanel lists all the document revisions for the parent document record and sorts the records in descending order by the revision number by default. Each revision retains a copy of the uploaded document in that revision, which allows users to easily look back at the history of the document to compare revisions. Please note that this does not work as expected with external documents (e.g., Google Docs, IBM Smart Cloud) as these documents are not stored in Sugar, and only a link to the document exists. To retain the change history, either utilize Google Doc's change features or select a different document for every revision.



To create a revision of the document you are currently viewing, simply click the Create button on the Document Revisions subpanel. The document revision record's name will be automatically populated with the parent document's name. The Revision field will also be automatically populated with the latest revision number plus one, but the value can be modified. If you skip numbers in the Revision field, Sugar will not go back and fill in the missing numbers when additional revisions are created. Please note that the Revision field will become read-only once the document revision record is saved. You can upload a new file for the document, and enter a short description of the change being made for the revision in the Change Log field. Once you have entered the necessary information, click "Save" to preserve your changes.

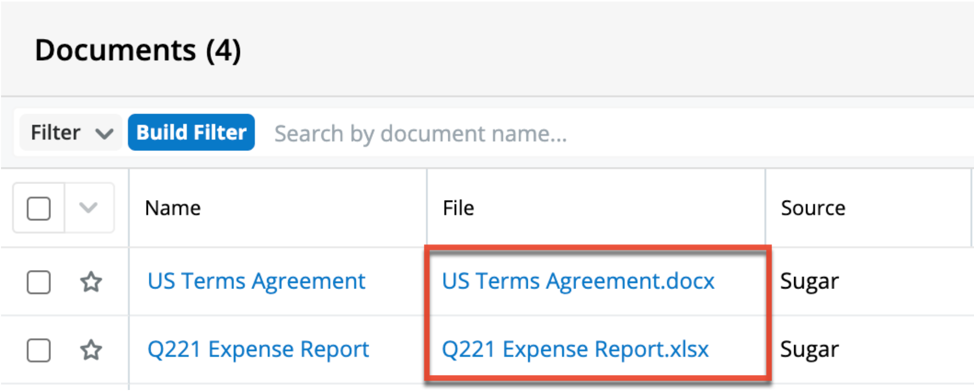


Note: When the parent document record is deleted in Sugar, all document revisions related to that document will be deleted as well.

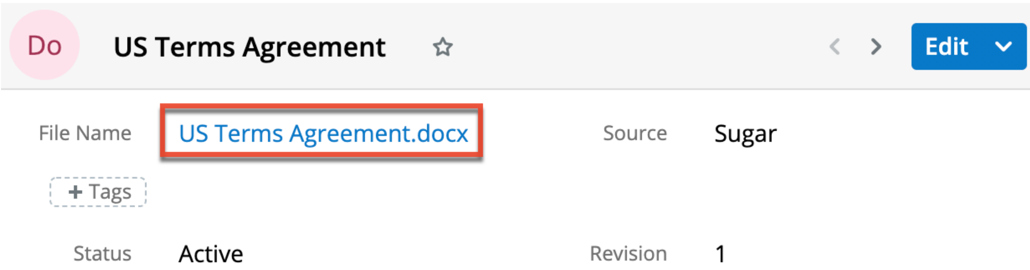
Downloading Documents

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 record view and the document will be downloaded to your computer. If the document is linked to an external source (e.g., Google Docs, IBM Smart Cloud), then the file name link will open directly to the doc via a new window or browser tab.

From Documents list view:



From Documents record view:



Working With Sugar Modules

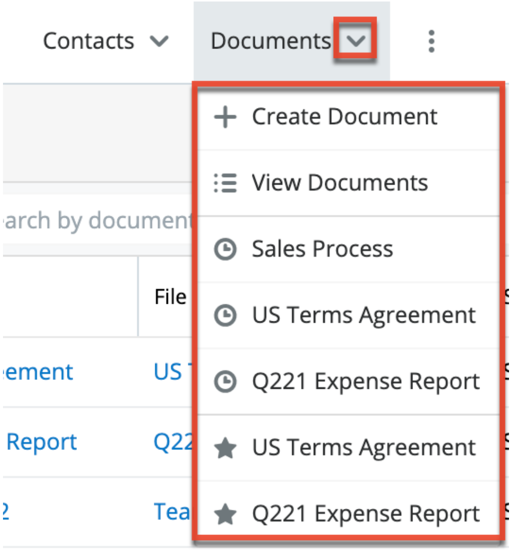
While the Documents module has some features that only apply to documents, it also uses the Sidecar user interface that most Sugar modules are based on. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Document Menus

The Documents module contains various options and functionality that are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Documents-specific functionality, within this page.

Module Tab Menus

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



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Document	Opens the record view layout to create a new document.
View Documents	Opens the list view layout to search and display documents.

For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

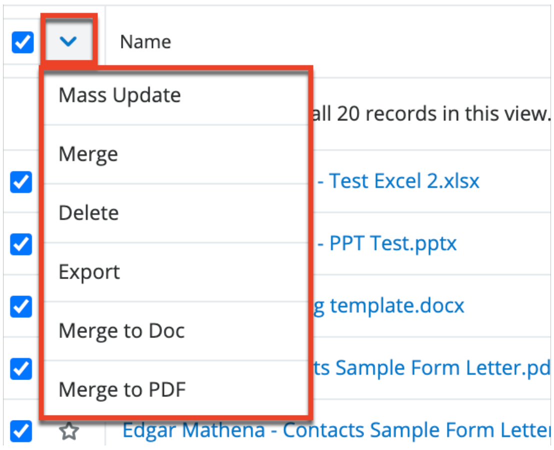
List View Menus

The Documents list view displays all document records and allows for searching and filtering to locate specific documents. You can view the basic details of each record within the field columns of the list view or click a document's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use

the checkbox on each record's row to select individual document records or click the checkbox in the list header to select all records displayed on the current set of list view results.

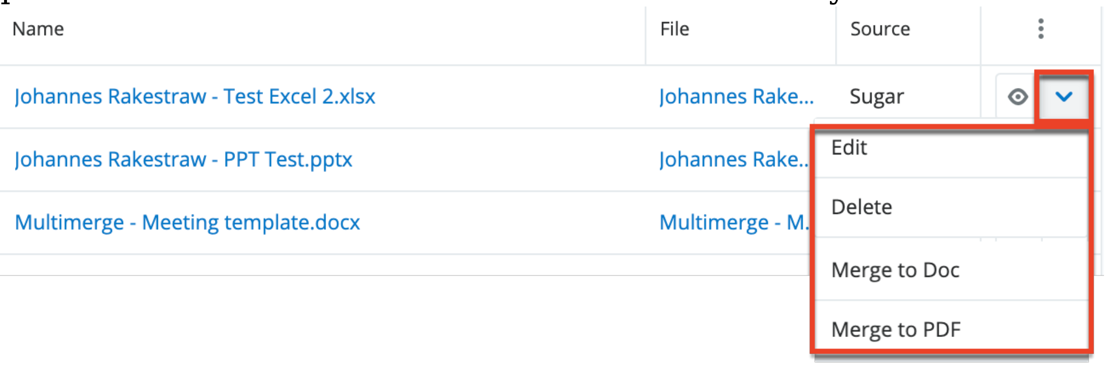


The Mass Actions menu allows you to perform the following operations:

Menu Item	**Description**
Mass Update	Mass update one or more documents at a time.
Merge	Merge two or more duplicate documents.
Delete	Delete one or more documents at a time. **Note**: All document revisions related to the parent document record will be deleted when the document is deleted.
Export	Export one or more documents to a CSV file.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual document directly from the list view.

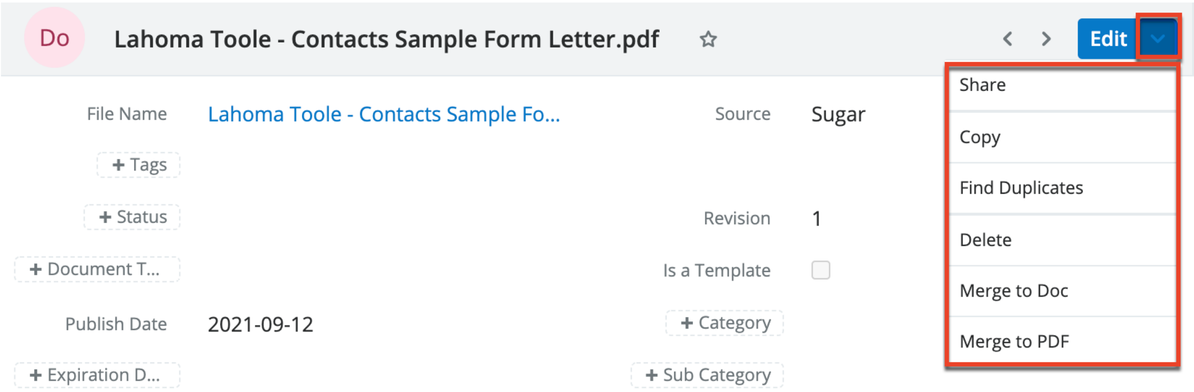


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this document in the intelligence pane.
Edit	Edit this document.
Delete	Delete this document. **Note**: All document revisions related to the parent document record will be deleted when the document is deleted.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Documents record view displays a single document in full detail including its fields and subpanels of related records. To access a document's record view, simply click a hyperlinked document name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this document.
Share	Share a link to this document via email.
Copy	Duplicate this document. **Note**: Only the last document revision record related to the original document will copy over to the new document, and the "Change Log" will display "Document Created".
Find Duplicates	Locate potential duplicates of this document.
Delete	Delete this document. **Note**: All document revisions related to the current document will be deleted when the document record is deleted.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to documents.

General Instructions for Working With Sugar Modules	Documents-Specific Instructions
Use the links below to navigate to the User Interface page that covers topics generic to many Sugar modules.	When Documents-specific help exists for each topic, use the links below to navigate to sections of the current page.
Creating Records	Creating via Google Docs
Viewing Records	
Searching for Records	
List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	
Editing Records	
Deleting Records	
Exporting Records	
Recalculating Calculated Values	
Finding Duplicate Records	
Merging Records	
Favoriting Records	
Following Records	
Sharing Records	

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Shifts

Overview

The Shifts module and its supporting module, Shift Exceptions, allow you to define the working hours of your employees. Shifts represent the hours during which users are available and shift exceptions represent the times when they are not, for reasons like time off or team events. When used in conjunction with SugarBPM's round-robin capabilities, these modules ensure that round-robin assigned records are only given to users who are currently available and have enough time to do the required work.

For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting shift and shift exception records, please refer to the Working With Sugar Modules section of this page.

Please note that you will only be able to see shift and shift exception records as allowed by your license type, team membership, assigned roles, and user access type. For more information, please refer to the referenced documentation in the Administration Guide.

Shift Fields

The Shifts module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation.

Field	Description
Description	A description of this shift.
Time Zone	The time zone in which the shift hours are set.
Start Date	The date this shift takes effect.
End Date	The last date this shift is active.
Days	The hours of each day users working this shift are available. **Note**: For more information, refer to the Creating Shifts section.
Teams	The Sugar team(s) assigned to the shift record. These teams are assigned to the record itself and do not necessarily work the hours specified by the shift. Only users added via the Users subpanel work the shift.
Assigned To	The Sugar user assigned to the shift record. This user is the owner of the record itself and does not necessarily work the hours specified by the shift. Only users added via the Users subpanel

	work the shift.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Date Created	The date the shift record was created.
Date Modified	The date the shift record was last modified.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field. **Note**: This field is not visible in the user interface.

Shift Exception Fields

The Shift Exceptions module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation.

Field	**Description**
Description	A description of this shift exception.
Time Zone	The time zone in which the shift exception hours are set.
Type	The type of shift exception (e.g., Time Off).
All Day	Indicates if the shift exception lasts an entire day or days.
Start Date	The date this shift exception takes effect.
End Date	The last date this shift exception is active.
Start Time	Only displayed if "All Day" is not checked. The time of day this shift

	exception takes effect.
End Time	Only displayed if "All Day" is not checked. The time of day this shift exception ends.
Enabled	If the shift exception is enabled, it will be used in user availability calculations in SugarBPM and appear in the Upcoming Exceptions dashlet.
Teams	The Sugar team(s) assigned to the shift exception record.
Assigned To	The Sugar user assigned to the shift exception record.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Date Created	The date the shift exception record was created.
Date Modified	The date the shift exception record was last modified.

Creating Shifts

Shifts represent the working hours of employees in your organization and can be used in various ways to manage your workforce. In particular, the work hours specified on a shift can be used in SugarBPM to assign records only to users who are currently working. See the Process Definitions documentation in the Administration Guide for more details.

Shifts are defined by the working hours set in the Days panel, which are specified in the time zone set on the shift record. In addition, the defined working hours only apply during the time between the start date and end date set on the shift. Therefore, the Time Zone, Start Date, and End Date field must all be filled in when creating a new shift.

The hours on a shift represent which hours of the day users in this shift work. To set the hours, navigate to the Days panel on a shift's record view. First, enable the checkbox next to the days of the week to which this shift applies and then fill in the Start Time and End Time for each of those days. "Start Time" and "End Time" are only required if that day of the week has been enabled.

Adding Users to Shifts

Once you have created a shift record, you can add users to it in the Users subpanel. Relating a user to a shift indicates that this user works the hours specified by the shift. Note that you cannot add users at the time of creation; you must first save the shift and then add the users to the newly created record.

Creating Shift Exceptions

Shift exceptions represent exceptions to users' working hours, such as for time off or a team event. If an admin is using SugarBPM to assign records based on users' availability, shift exceptions are also used to mark users as unavailable for a period of time when they would normally be working. See the Process Definitions documentation in the Administration Guide for more details.

The following are some possible examples of what shift exceptions could be used to track:

- Paid time off (PTO)
- Annual leave
- Paid holidays
- Team events (e.g., training, team building)

To access the Shift Exceptions module, open the Shifts module tab menu and choose either "View Shift Exceptions" to access list view, or "Create Shift Exception" to start creating a new shift exception record. The Shifts list view also has an Upcoming Exceptions dashlet by default in its intelligence pane.

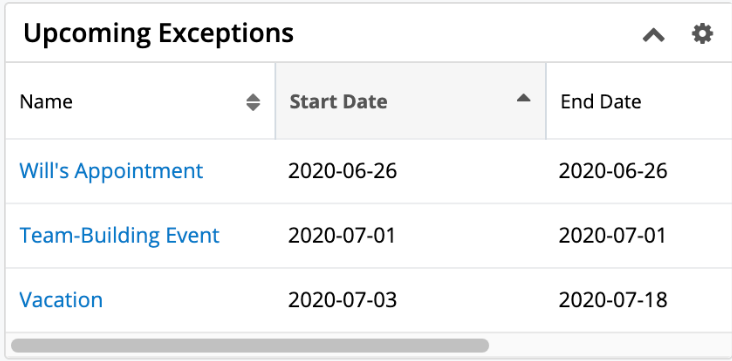
Shift exceptions are defined by a start date and end date. If the All Day checkbox is unchecked, then the Start Time and End Time fields are also required and are set in the time zone specified on the record. Shift exceptions are only active when the Enabled checkbox is checked; if a shift exception is not enabled, it is not included in availability calculations in SugarBPM. The Enabled field can also be used to indicate if the shift exception has been approved by a manager. To do this, you may wish to restrict the field to only roles that are permitted to approve shift exceptions. See the Role Management documentation in the Administration Guide for more information.

Adding Users to Shift Exceptions

Once you have created a shift exception record, you can add users to it in the Users subpanel. Relating a user to a shift exception indicates that the shift exception applies to this user. Note that you cannot add users at the time of creation; you must first save the shift exception and then add the users to the newly created record.

Upcoming Exceptions Dashlet

The Upcoming Exceptions dashlet is shown by default on the intelligence pane in the Shifts list view. It lists all enabled shift exceptions that do not occur in the past; this offers the ability to see a summary of upcoming shift exceptions that will impact your employees' working hours.



Upcoming Exceptions

Name	Start Date	End Date
Will's Appointment	2020-06-26	2020-06-26
Team-Building Event	2020-07-01	2020-07-01
Vacation	2020-07-03	2020-07-18

Managing Your Workforce

When used in conjunction, the Shifts and Shift Exceptions modules allow you to define your employees' work schedules with as much granularity as you need. Shifts represent the times when the related users are working, and in the same way, shift exceptions represent the times when their related users are not. As a result, infrequent and irregular exceptions to the shifts you have defined can be easily handled with shift exceptions so that you do not have to update the shifts themselves.

These modules can be used by SugarBPM to consider users' availability, as defined by their shifts and any shift exceptions or holidays that may overlap these shifts, when assigning records. See the Process Definitions documentation in the Administration Guide for more details on how this works in SugarBPM.

Viewing Users' Shifts and Shift Exceptions

There are several ways to see the work schedule of a specific user. First, the Shifts and Shift Exceptions subpanels are displayed on the Employees record view showing all shifts and shift exceptions to which the user is related. This allows you to see all of the working hours and exceptions to these hours in one place. In addition, administrators can see these same subpanels on the Users detail view. See the Employees page in the Application Guide and the User Management page in the Administration Guide for more details.

Reports can also be used to see an overview of your organization's shifts and shift exceptions, including which shifts or shift exceptions a user has. For example, you may wish to create a report that shows users and the shifts they work for a view of the overall shift schedule in Sugar. Likewise, you could create a report to see the historical or upcoming shift exceptions for your employees, or only those that are not enabled and may be awaiting manager approval. Refer to the Reports documentation for details on creating reports.

Working With Sugar Modules

While the Shifts and Shift Exceptions modules have some features that only apply to these modules, they also use the Sidecar user interface that most Sugar modules are based on. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

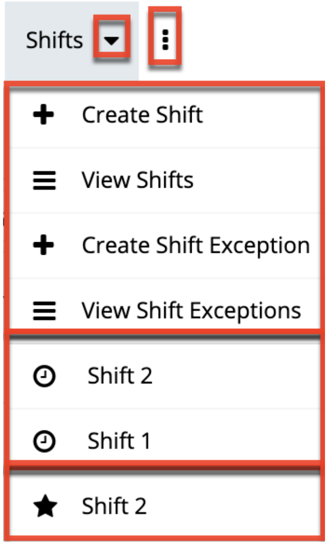
Shift and Shift Exceptions Menus

The Shifts and Shift Exceptions modules contain various options and functionality that are available via menus in the module tab, list view, and record view. The following sections present each menu type, using the Shifts module as an example, and its options with links to more information about each option in the User Interface documentation.

Module Tab Menus

The Shifts module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar at the top of any Sugar screen. The additional modules will appear on the list and you can click "Shifts" to access the list view.

Once the Shifts tab displays on the navigation bar, click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions (e.g., create a shift or access the Shift Exceptions module). The Recently Viewed menu displays the last few shifts you recently opened. The Favorites menu displays the last few shifts you most recently marked as favorites; for information about favoriting records in Sugar, please refer to the User Interface documentation.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Shift	Opens the record view layout to create a new shift record.
View Shifts	Opens the list view layout to search and display shift records.
Create Shift Exception	Opens the Shift Exceptions record view layout to create a new shift exception.
View Shift Exceptions	Opens the Shift Exceptions list view layout to search and display shift exceptions.

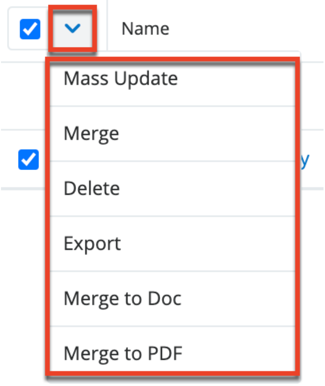
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Shifts list view displays all shift records and allows for searching and filtering to locate specific shifts. You can view the basic details of each record within the field columns of the list view or click a shift's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual shift records or click the checkbox in the list header to select all records displayed on the current set of list view results.

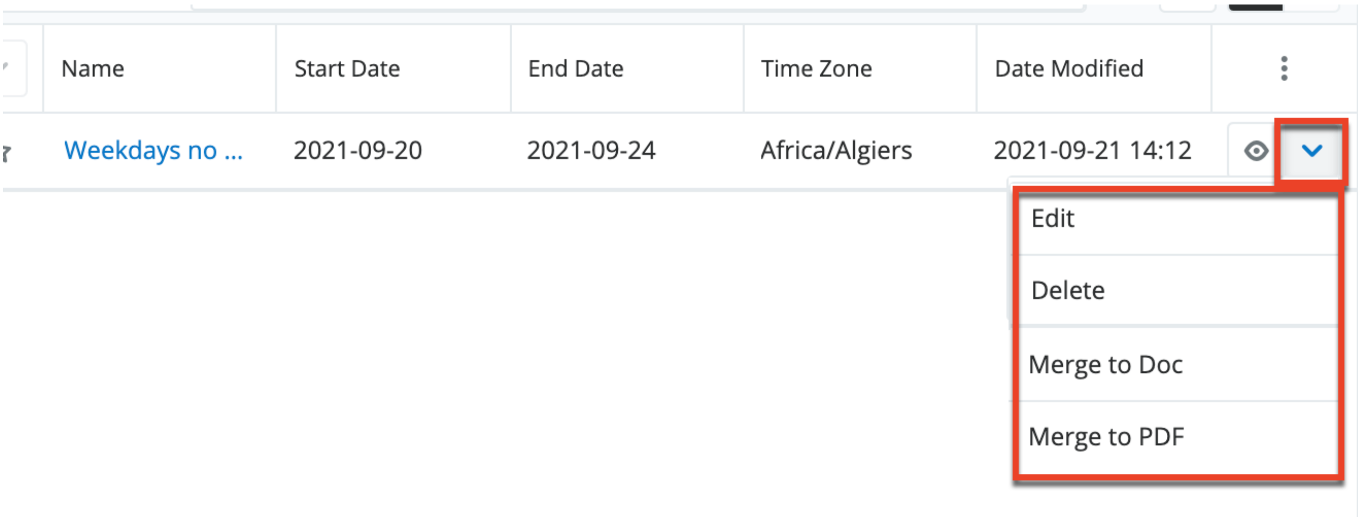


The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more shift records at a time.
Merge	Merge two or more duplicate shift records.
Delete	Delete one or more shift records at a time.
Export	Export one or more shift records' data to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on a shift record directly from the list view.

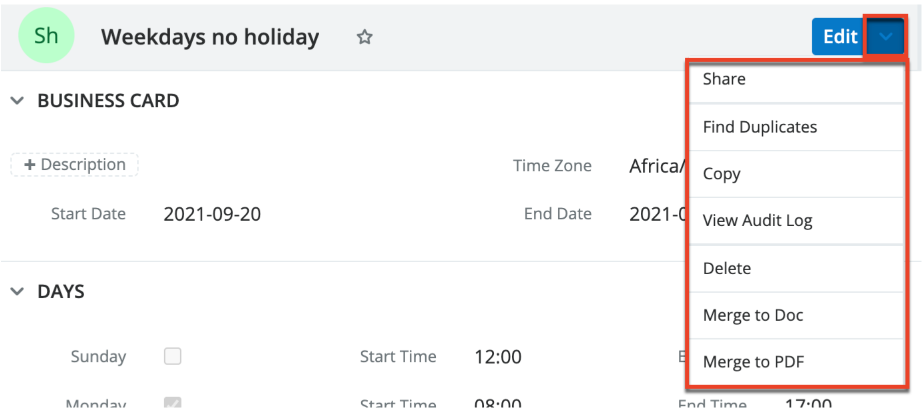


The options in the Record Actions menu allow you to perform the following operations:

Menu Item	Description
Preview (eye icon)	Preview this record in the intelligence pane.
Edit	Edit this record.
Delete	Delete this record.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Shifts record view displays a single shift record in full detail including its relevant fields and subpanels of related records. To access a shift's record view, simply click on the shift's name from the list view, dashlet, or report results. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this record.
Share	Share a link to this record via email.
Find Duplicates	Locate potential duplicates of this shift.
Copy	Duplicate this shift to create a new shift record.
View Audit Log	View a list of changes that have been made to this shift record.
Delete	Delete this record.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to shifts and shift exceptions.

General Instructions for Working	Shifts- and Shift-Exceptions-Specific

With Sugar Modules	Instructions
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Shifts- or Shift-Exceptions-specific help exists for each topic, use the links below to navigate to sections of the current page.
Creating Records	Creating Shifts Creating Shift Exceptions
Viewing Records	
Searching for Records	
List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	
Editing Records	
Deleting Records	
Finding Duplicate Records	
Viewing Audit Logs	
Favoriting Records	
Sharing Records	

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Escalations

Overview

Sugar's Escalations module contains records representing the escalation of another module's record (e.g., an account). The record could be escalated for a variety of reasons such as inactivity or being at risk, but escalations allow you to bring extra attention to this record and track all interactions and work that is done to resolve the issue. Set the escalation's "Related To" flex-relate field to the record that is being escalated; this will cause an Escalated badge to be displayed on the selected record so users can easily see that it is currently escalated. You can also add other records that are relevant to the escalation in the subpanels (e.g., calls that take place to resolve the escalation).

The following modules can be escalated: Accounts and Opportunities.

This documentation covers information and actions specific to the Escalations module. For instructions concerning views and actions that are common across most Sugar modules, such as creating, editing, and deleting messages, please refer to the Working With Sugar Modules section of this page.

Please note that you will only be able to see escalation records as allowed by your license type, team membership, assigned roles, and user access type. For more information, please refer to the referenced documentation in the Administration Guide.

Escalation Fields

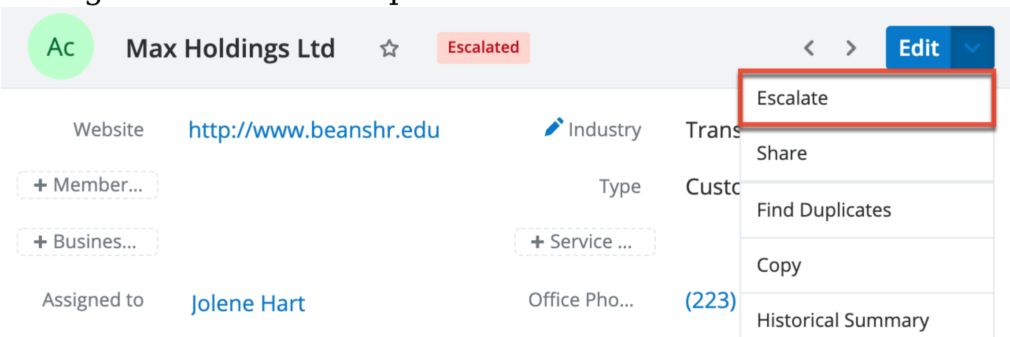
The Escalations module contains a number of stock fields that come out of the box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role 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 escalation.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
Date Created	The date the escalation was created.
Date Modified	The date the escalation was last modified.
Description	A description of this escalation.

Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
Number	An automatically incremented number to identify every escalation, which cannot be edited through Sugar.
Reason	The reason the selected record was escalated.
Related To	The record that is being escalated (e.g., an account).
Related Type	The type of record that is being escalated (e.g., "Accounts"). **Note**: This field is only available as an individual field on list view, in subpanels, in reports, and in SugarBPM. In other views, such as record view, you can find the value of this field by looking at the field label of the Related To field when it is populated with a record.
Source	The source of the escalation (e.g., "Internally Requested").
Status	The status of the escalation (e.g., "In Progress").
Subject	The subject or title of the escalation.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the escalation record.

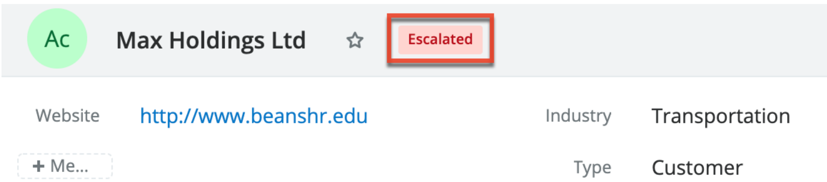
Escalating Records

There are several ways to escalate an account or opportunity: you can either create an escalation record in the same way you create other records in Sugar or you can select the Escalate option on the record you wish to escalate. See the [User Interface] page for details on creating records on Sugar. To escalate a record, navigate to its [record view] or [Record View dashlet] and open the Actions menu to find the Escalate option. Note that it is only available if the Escalations module and subpanel are displayed in your instance and you have the necessary role access to the Escalations module. See the [Administration Guide] for details on displaying and hiding modules and subpanels.

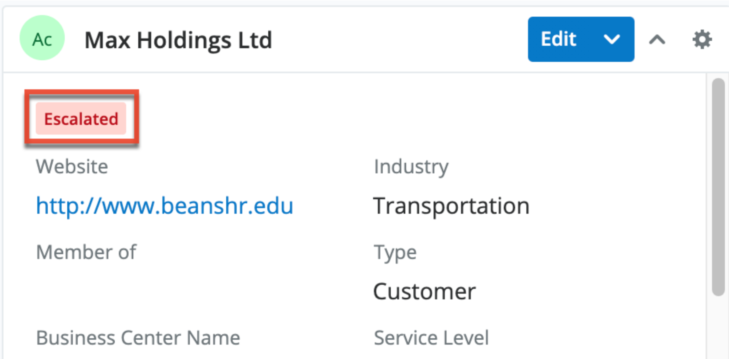


Clicking this option opens a Create drawer with the target record already set in the Related To field so you can fill in the remaining details of the escalation. After you save, refresh the view to see the Escalated badge at the top of record view or, if configured by an admin, in the dashlet:

- Record view:



- Record View dashlet:



The badge is also shown at the top of the record's preview and the Escalated field can also be added to list views and List View dashlets. If the escalated record has a related account (i.e., an account's Member Of field or an opportunity's Account Name field), that account is added to the Accounts subpanel on the escalation automatically when the escalation is saved. This means that that escalation will also appear in the account's Other Related Escalations subpanel automatically.

Note that if the escalation is then updated to target a different record with a related account, the new account is added but the previous account is not removed.

An account or opportunity can have multiple open escalations; the Escalated badge is displayed as long as the record has at least one open (i.e., new or in progress) escalation. When the last escalation is closed, the badge is no longer displayed.

Working With Sugar Modules

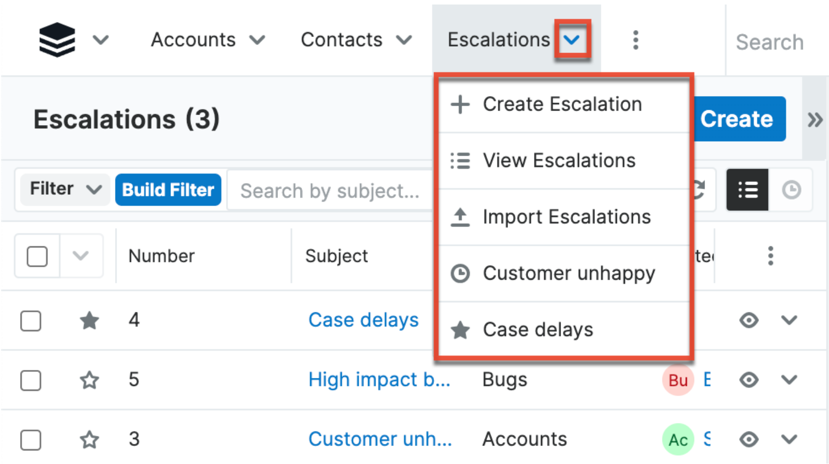
While the Escalations module has some features that only apply to escalations it also uses the Sidecar user interface that most Sugar modules are based on. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Escalation Menus

The Escalations module contains various options and functionality that are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation.

Module Tab Menus

The Escalations module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Escalations" to access the list view. Once the Escalations tab displays on the navigation bar, you can click the triangle within 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 escalations you most recently viewed. The Favorites menu displays the list of escalations you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Escalation	Opens the record view layout to create a new escalation.
View Escalations	Opens the list view layout to search and display escalations.
Import Escalations	Opens the import wizard to create or update targets using external data.

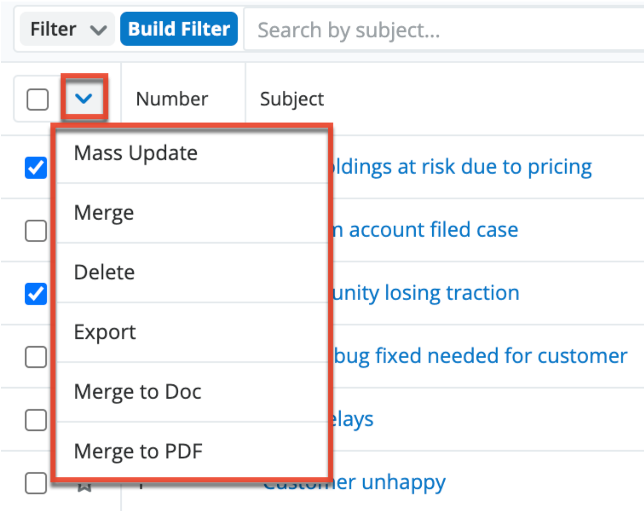
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Escalations list view displays all escalation records and allows for searching and filtering to locate specific escalations. You can view the basic details of each record within the field columns of the list view or click an escalation's subject to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual escalation records or click the checkbox in the list header to select all records displayed in the current set of list view results.

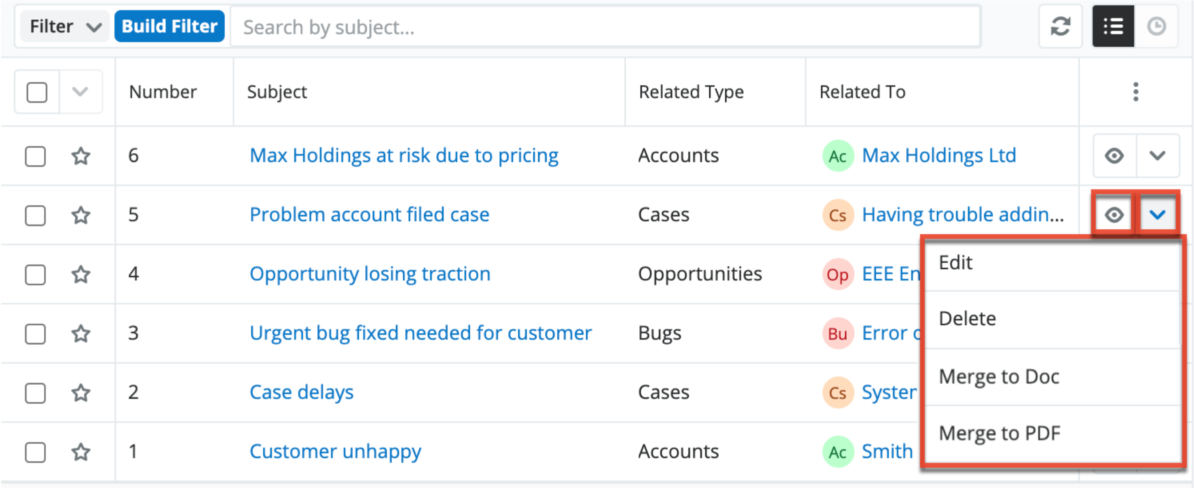


The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more escalations at a time.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Merge	Merge two or more duplicate escalations.
Delete	Delete one or more escalations at a time.
Export	Export one or more escalations to a CSV file.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual escalation directly from the list view.

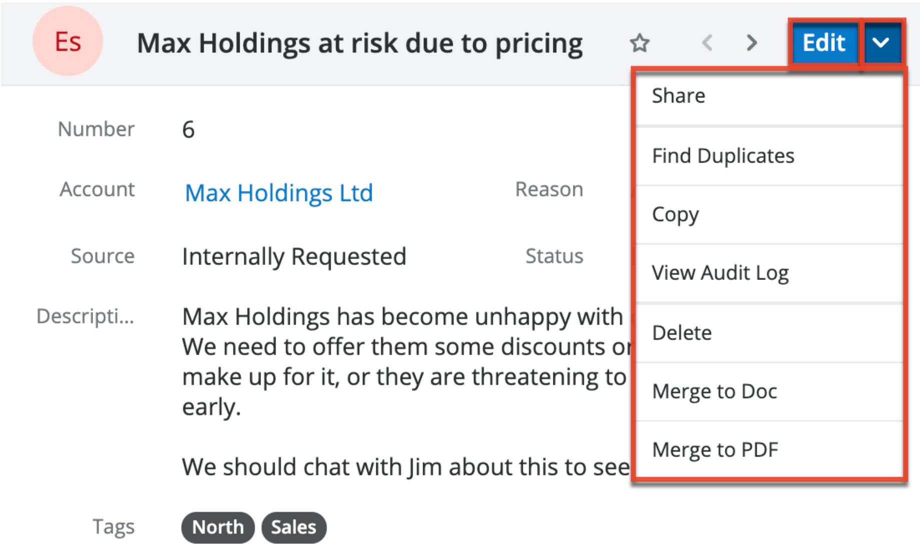


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this escalation in the intelligence pane.
Edit	Edit this escalation.
Delete	Delete this escalation.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Escalations record view displays a single escalation in full detail including its fields, subpanels of related records (if applicable), and activity stream. To access an escalation's record view, simply click a hyperlinked escalation subject from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this escalation.
Share	Share a link to this escalation via email.
Find Duplicates	Locate potential duplicates of this escalation.
Copy	Duplicate this escalation.
View Audit Log	View a record of changes to this escalation.
Delete	Delete this escalation.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to escalations.

General Instructions for Working With Sugar Modules	Escalations-Specific Instructions
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Escalations-specific help exists for each topic, use the links below to navigate to sections of the current page.
Creating Records	Escalating Records
Viewing Records	
Searching for Records	
List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	
Editing Records	
Deleting Records	
Exporting Records	
Favoriting Records	
Sharing Records	

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Knowledge Base

Overview

Sugar's Knowledge Base module provides the ability to create, maintain, and publish information in the form of articles. Knowledge base articles can cover a variety of topics such as troubleshooting or frequently asked questions. When used for internal purposes, articles can be accessed via the Sugar instance by Sugar users within your organization. When needed for external purposes, articles can also be published to the Sugar Portal, providing visibility for customers or other portal users.

Articles can be rated based on their usefulness by both internal and external readers to help you determine which articles should be improved or updated and which should be promoted as valuable information. As you work to improve articles, you can create revisions to keep a history of versions as well as to make changes without immediately affecting published content. Articles can also be localized to reach new audiences using a variety of languages. This documentation will cover information and actions specific to the Knowledge Base module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting accounts, please refer to the Working With Sugar Modules section of this page.

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.

Article Fields

The Knowledge Base module contains a number of stock data fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below 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**
Active Revision	Denotes the most up-to-date, unpublished revision of an article. This box is automatically set when a new revision is created for an unpublished article so that only the newest revision will have it checked. Only revisions with "Active Revision" checked will appear in the Knowledge Base list view. **Note**: If a revision is published, it will retain the Active Revision designation until a subsequent revision is published in its place.
Approved By	The Sugar user who is appointed to approve the article. **Note**: When setting an article's status to "Approved", the Approved By field will automatically be populated with your

	name.
Attachments	External files uploaded to the article which can be downloaded from the article via Sugar Portal.
Author	The Sugar user who owns the article. **Note**: The author defaults to the current user.
Body	The HTML content of the article.
Category	The category, or topic, the article belongs to.
Created By	The Sugar user who created the article.
Date Created	The date that a user created the article.
Date Modified	The last date that a user modified the article.
Description	A brief description of the article's content.
Expiration Date	The date on which the article information expired or will expire in the future. **Note**: The status for published articles will automatically change to "Expired" on the specified expiration date.
External Article	Indicates whether an article should be visible through the Sugar Portal. **Note**: This field must be in a checked state for an article to be visible through the Sugar Portal.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
View Count	How many times the published article has been viewed either via the Sugar instance or Sugar Portal.
Language	The language used in the article.
Modified By	The Sugar user who last modified the article.
Publish Date	The date the article was published or

	will be published in the future. **Note**: The Publish Date field will automatically default to today's date when an article's status is set to "Published".
Related Case [1]	The case record that inspired and is associated with the article. **Note**: Creating an article from a case causes the case to automatically populate this field.
Status	The current status of the article (e.g., Draft, Expired, In Review, Published). **Note**: The Status field must be set to "Published" for an article to be visible through the Sugar Portal.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the article.
Title	The name of the article. **Note**: This field will be visible to readers when the article is published.

[1] This field's value is only visible to Sugar Serve, Enterprise, and Ultimate users; when this field appears on layouts, users without a supported license type will see a placeholder containing the text "License Required" instead of the field's value. See the User Management page for more details on license types.

Article Statuses

When viewing an article's record view or the Knowledge Base list view, the Status field will show a different color for each status. Administrators have the ability to configure the status values via Admin > Dropdown Editor. For more information on configuring the status values, please refer to the Developer Tools documentation in the Administration Guide.

Please note that the below values are only guidelines for defining your status and that you can skip one or more statuses based on your organization's needs.

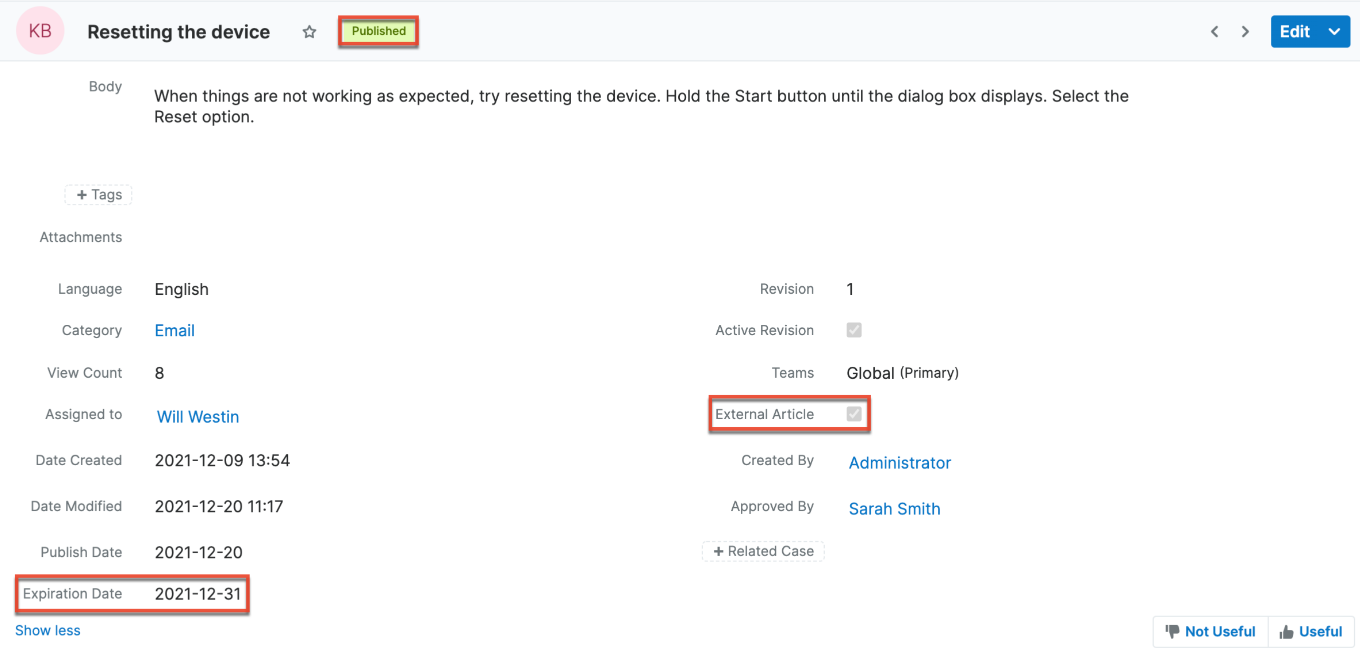
Color	Status	Label	Description
White	Draft	Draft	The article is currently undergoing changes.
Yellow	In Review	In Review	The article is being reviewed by the designated approver. **Note**: When the status changes to "In Review", a notification email is automatically sent to the user who is designated in the Approver field.
Blue	Approved	Approved	The article has been approved for publish.
Green	Published	Published	The article is live in the knowledge base.
Gray	Expired	Expired	The article's expiration date is in the past. **Note**: The status of published articles will automatically change to "Expired" on the specified expiration date, but they will remain visible in the knowledge base.

Sugar Portal and Articles

The Sugar Portal allows your customers and partners to read and vote on the usefulness of knowledge base articles.

Note: Only registered users of your Sugar instance's portal can log in to view and rate articles. For more information on enabling and configuring the portal and portal users, please refer to the Sugar Portal documentation. For information on using the portal, please refer to the Portal Deployment User Guide and Portal User Guide documentation.

To make an article visible in portal, enable the article's "External Article" checkbox, specify an Expiration Date for a future date, and ensure that the article's status is "Published".



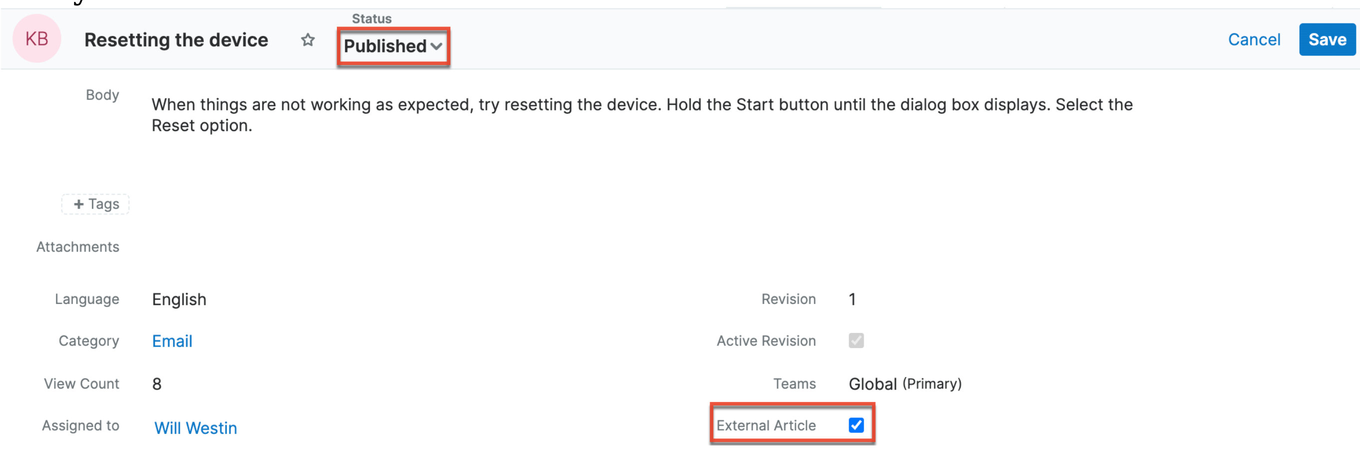
Publishing Articles

Publishing a completed article allows you to make it visible on the Sugar Portal for your customers and others outside of your Sugar users to view. For knowledge base consumers within your organization who are Sugar users, publishing also changes the article's status and designates that version as the active revision, making it available in the knowledge base list view until a subsequent revision is published. This enables your internal users to access knowledge base content within Sugar by browsing the Knowledge Base Categories & Published Articles dashlet, the Knowledge Base Search dashlet, or the Knowledge Base list view.

Articles can be published manually or scheduled to be published automatically on a future date. Publishing will check the article's Active Revision checkbox, making it available in the Knowledge Base list view even if a related revision was previously considered the active revision. Once an article has been published, the published version will retain the Active Revision designation when new revisions are created. Only when another revision is published in its place will the Active Revision designation be transferred. If an article is already published, publishing a related revision will also cause the original article's status to be changed to "Expired". For more information about revisions, please refer to the Article Revisions section of this page.

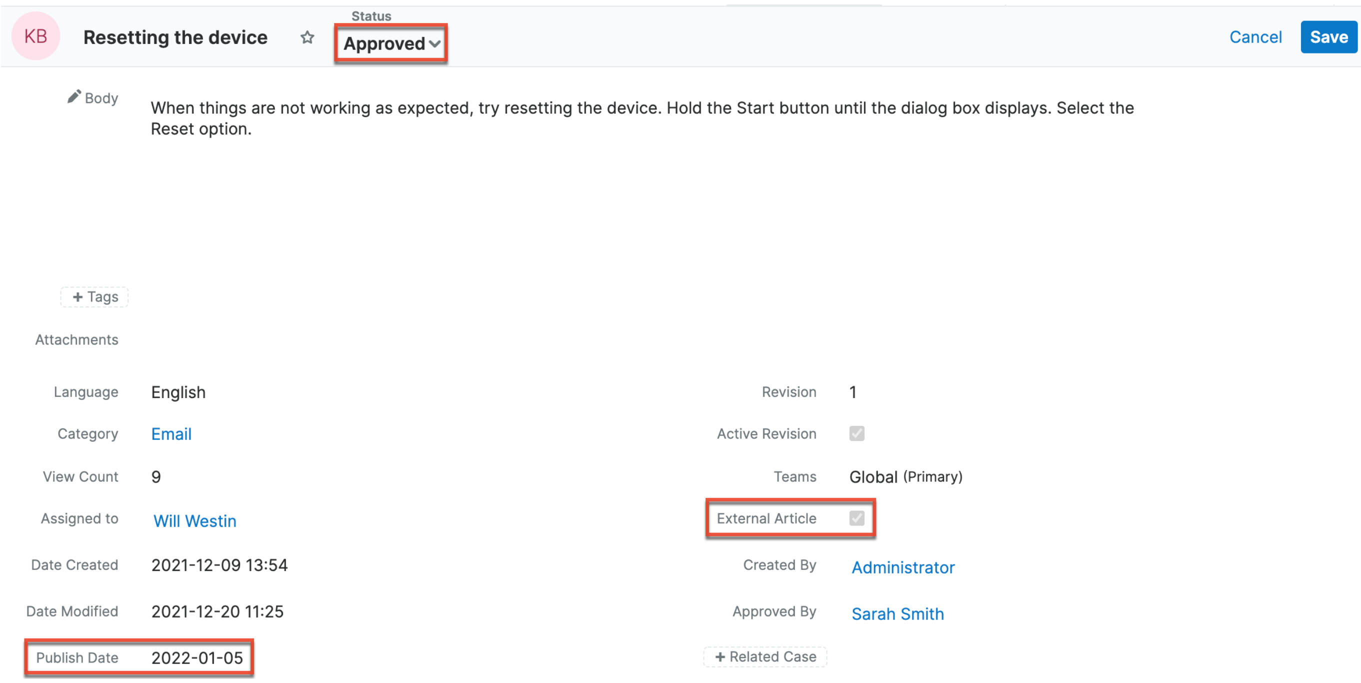
Publishing Articles Immediately

To publish an article, simply edit the Status field to "Published" and save the record. If you want the article to be visible in the Sugar Portal, make sure the External Article box is checked. The Publish Date field will automatically set to today's date.



Scheduling a Future Publish

To schedule an article to publish in the future, set the Publish Date field to a date in the future, change the Status field to "Published", and save the record. If you want the article to be visible in the Sugar Portal, make sure the External Article box is checked. On the specified publish date, the article's status will change to "Published" and the article will automatically become visible.

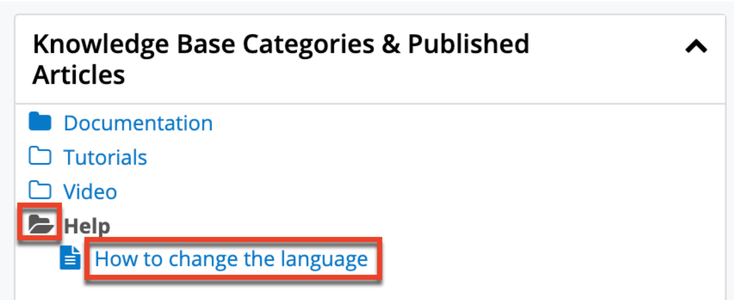


Viewing Published Articles by Category

While the Knowledge Base list view allows you to locate articles using traditional search, filter, and sorting, Sugar also allows you to navigate the hierarchical structure of categories to locate published articles using the Knowledge Base Categories & Published Articles dashlet or the Knowledge Base Search dashlet.

The Knowledge Base Categories & Published Articles dashlet can be added to the Knowledge Base list view and record view intelligence panes. When it is included on the Knowledge Base record view and you are viewing a published article, it will automatically open to display the current article. This is a convenient way to confirm the placement of a published article in your category hierarchy.

Folder icons represent categories while document icons represent articles. Blue folders indicate that a category contains child categories or published articles; clicking the blue folder will expand it to display the category's contents. White folders, on the other hand, may not be expanded since they indicate that the category has no child categories or published articles. To collapse an expanded category, simply click the open folder icon. Clicking an article's name will open the article in record view.



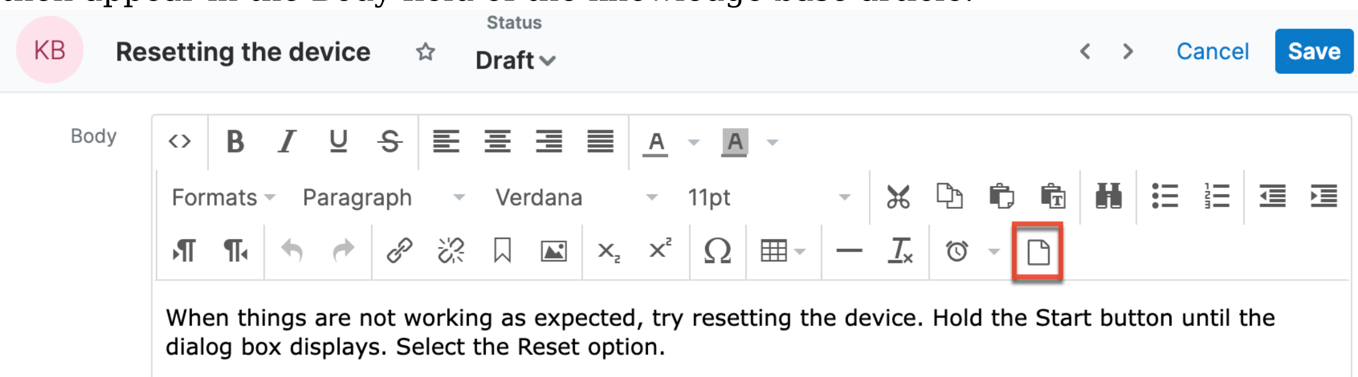
The Knowledge Base Search dashlet provides a similar view but also includes a search bar to allow you to quickly search published articles. See the Dashboards and Dashlets page for more information on this dashlet.

Article Templates

Administrators have the ability to create templates to improve consistency or ease access to common or brand elements across your organization's knowledge base. Knowledge Base templates can contain text, HTML content, and images including embedded .jpg or .png image files. Existing templates can then be used by regular users when creating articles to improve article consistency and quality while reducing the amount of time they must spend. For more information on how administrators can work with article templates, please refer to the Knowledge Base Administration documentation in the Administration Guide.

Applying Templates to Articles

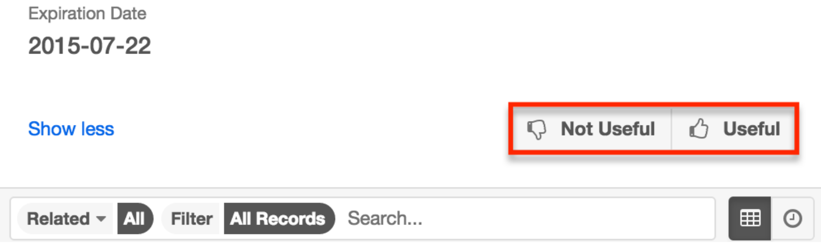
You can apply an existing template when creating or editing a Knowledge Base article. From the article's record view, click on the Templates button located in the editing toolbar for the Body field. A Search and Select drawer will appear where you can choose the desired template record. The selected template's content will then appear in the Body field of the knowledge base article.



Note: If the Body field already contains content prior to selecting a template, you will receive a message requesting confirmation before the selected template can be applied. Select "Cancel" to disregard the template or "Confirm" to overwrite any existing content with the template's content.

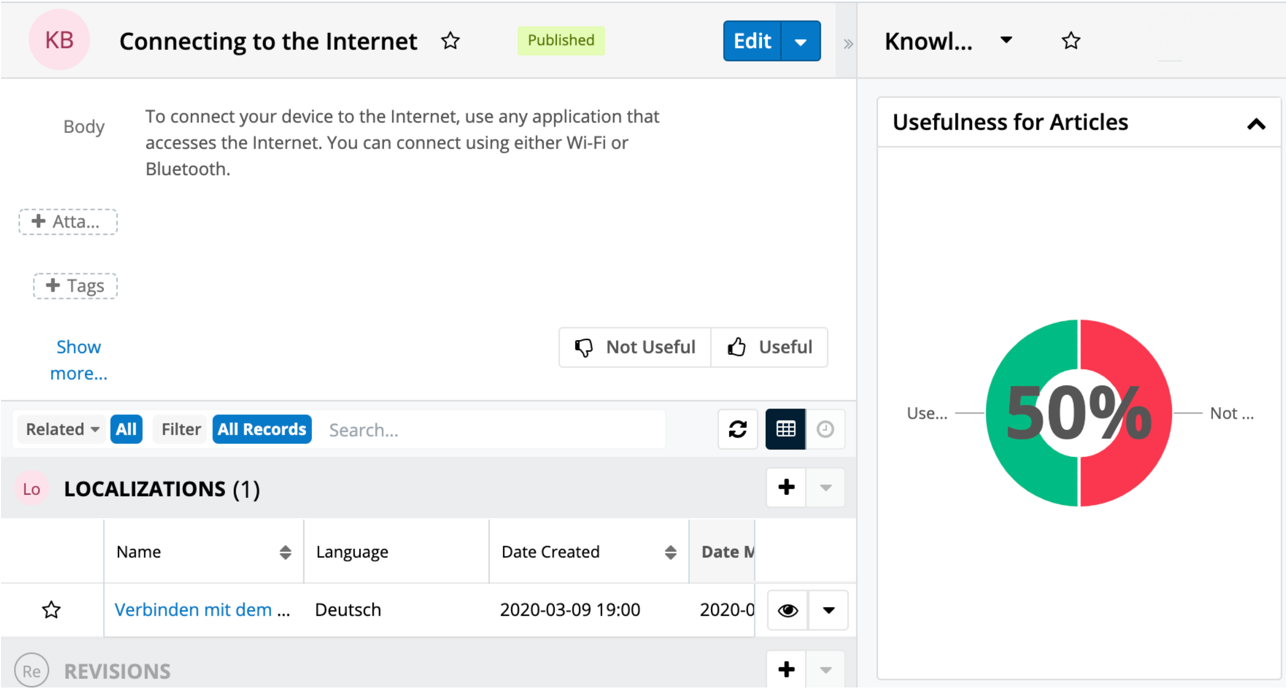
Article Ratings

Reader feedback is important to gather and consider when working on knowledge base articles. In Sugar, both internal and external users have the ability to vote whether an article is useful or not. Internal users will find the Useful and Not Useful buttons on the article's record view. Sugar Portal users will find the same icons when viewing the article in the portal. Each time a new revision is created, it starts with zero votes, effectively wiping the slate for your improved or updated content.



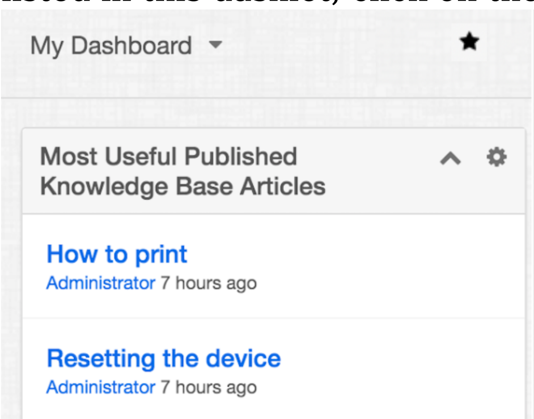
Viewing Article Ratings

As users vote an article as useful or not useful, the clicks are tallied within Sugar and can be viewed via a dashlet on the article's record view. The Usefulness for Articles dashlet may be added to the Knowledge Base record view's intelligence pane to display the aggregated usefulness of the current article. It totals the Useful and Not Useful votes that the article has received and shows the percentage of Useful votes on top of a visual depiction of the ratio. The red portion represents Not Useful votes while the Useful votes are shown in green. Hovering on the green or red portions displays the exact percentage and number of corresponding votes.



Viewing Useful Published Articles

The Most Useful Published Knowledge Base Articles dashlet displays a list of top-rated published articles based on usefulness ratings and view count. Article usefulness is tallied via clicks on the Useful and Not Useful icons. The view count is the total number of views an article has received as shown in the View Count field. This dashlet displays the top three articles in descending order according to their rating. Click "More most useful published knowledge base articles" at the bottom of the dashlet to see additional articles. To view the details of an article listed in this dashlet, click on the article's name to navigate to its record view.



Article Attachments

Articles can include attached files which will then be available for download by the article's viewers. In an article's record view, one or more files can be uploaded to the Attachments field. To select multiple attachments at a time, hold the Ctrl or Shift key on your keyboard while selecting the files. Then, when users view the published article, they will have the option to download a single attachment by either clicking the pill that contains the name of the attached file or by clicking "Download".

When multiple attachments exist on a single article, users viewing the article will have the option to download a single attachment or all attachments at once. They may click the pill that contains the name of the single file for download or click "Download All" to download a .zip file containing all of the attachments to their computer.

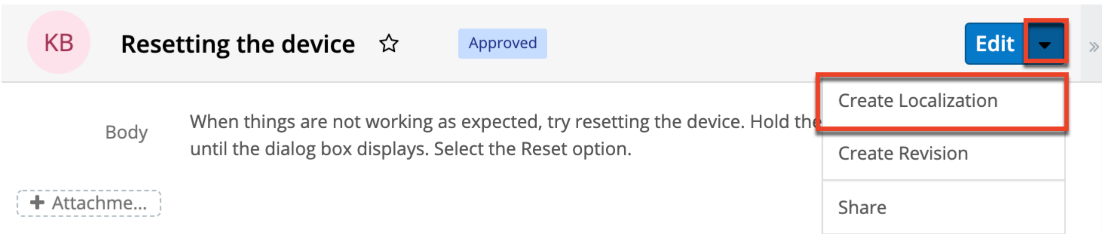
Article Localizations

A localization is a copy of an article that has been adapted for a different audience, usually via translation to another language. Administrators must first add desired languages to the Knowledge Base module as described in the Knowledge Base Administration documentation. Once languages are configured in your instance, users may create localizations that will copy all populated fields from the original article except for the Status and Language fields. This allows users to re-write the article's contents in various languages to accommodate different target audiences.

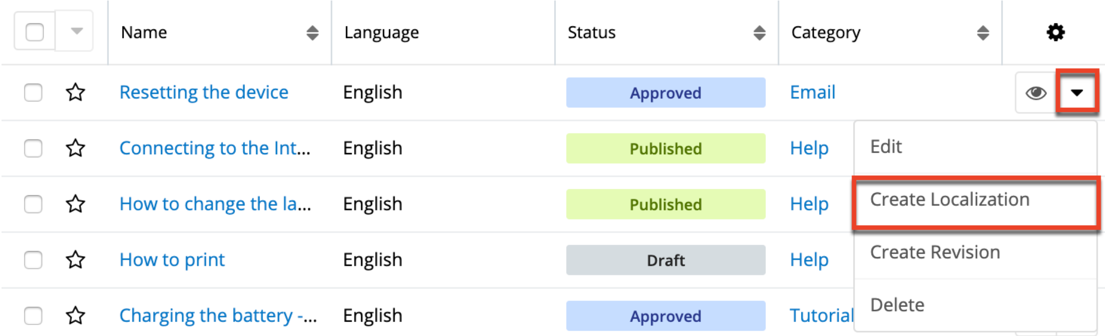
Note: If an administrator deletes a language from the Knowledge Base module's Settings page, all localization articles associated with the deleted language will also be deleted.

Creating Localization Articles

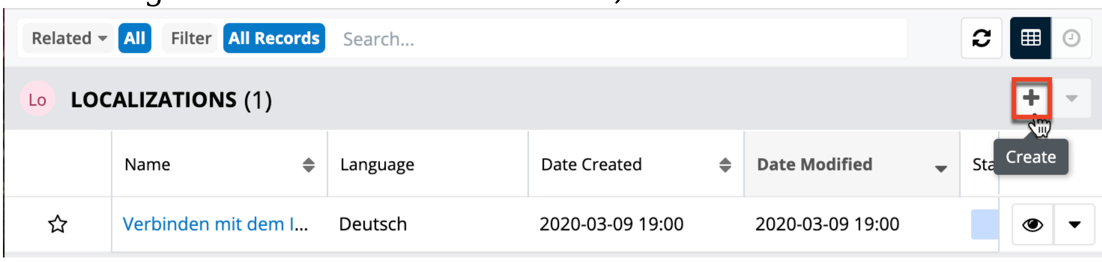
A localization article can be created from the Knowledge Base list view, the article's record view, or the Localizations subpanel. There are many ways users can create a new localization:

- To create a localization article from a Knowledge Base article's record view, click the Actions menu and select "Create Localization".


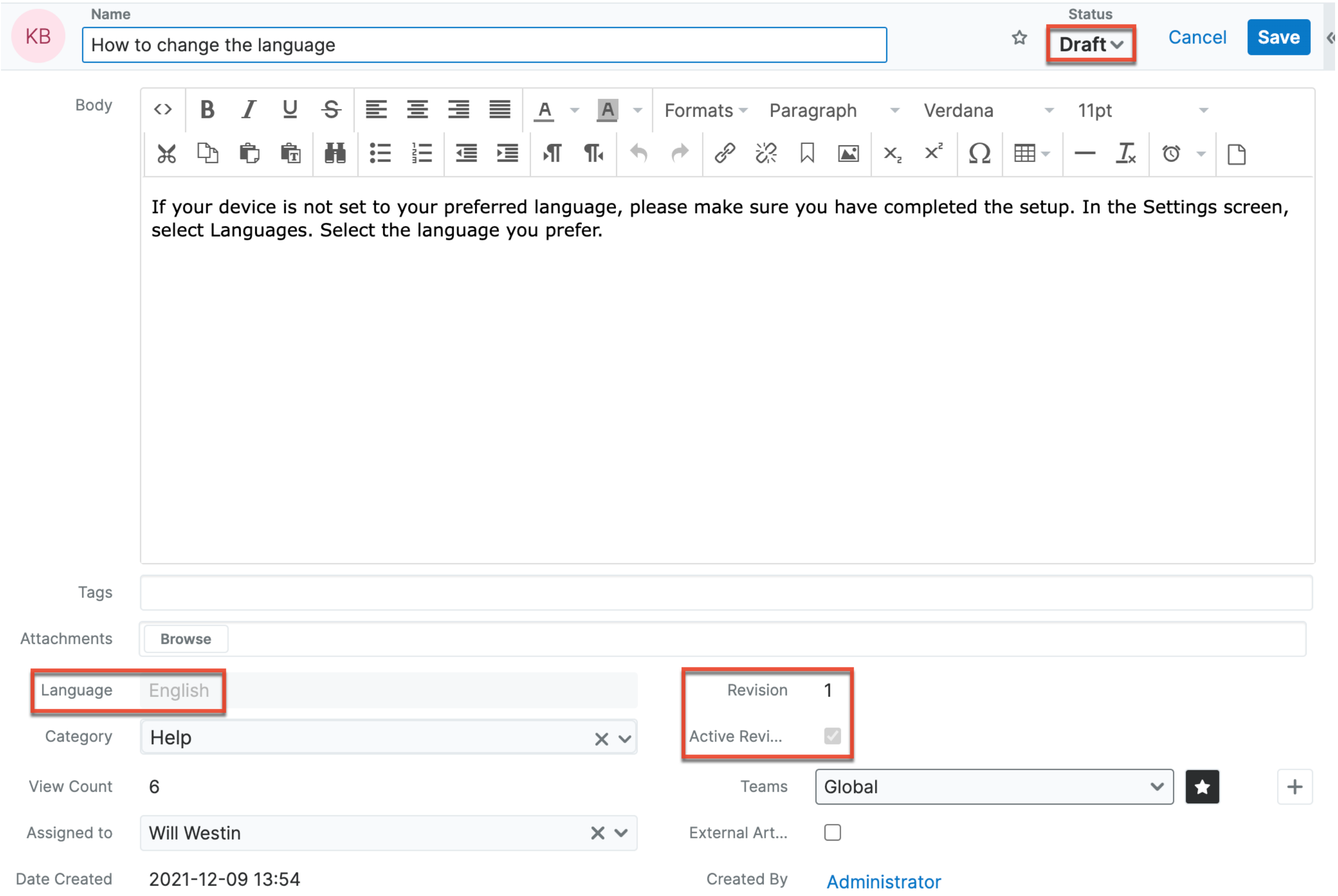
- To create a localization article from the Knowledge Base article list view, click the article row's Actions menu and select "Create Localization".



- To create a localization article from the [Localizations subpanel](#) on a Knowledge Base article's record view, click the Plus icon.

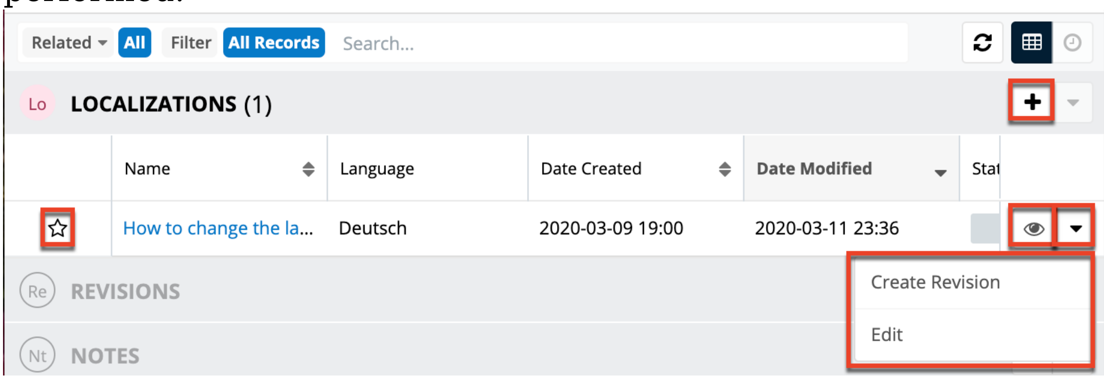


A drawer will appear with a copy of the original article details except for the Language and Status fields. The Status field will automatically be set to "Draft". Users should choose the appropriate language and, optionally, edit the status and any other desired field. Clicking "Save" will finalize the new localization article, and it will appear within the Knowledge Base list view and on the parent article's record view within the Localizations subpanel.



Localizations Subpanel

A localization article is a copy of an article that has been adapted for a different audience via translation to another language. The Localizations subpanel displays all localizations related to the article and allows the following operations to be performed:



- **Localization Details**: To view the details of a related localization article, click the article's name in the subpanel to open it in record view.
- **Record Count**: Subpanel headers display the total count of related records

(e.g., "5 of 6+") next to the module name. The count captures the number of localizations currently displayed with an additional, hyperlinked number (e.g., "6+") where there are more localizations than currently displayed. Click the hyperlinked number to see the total count of related records.

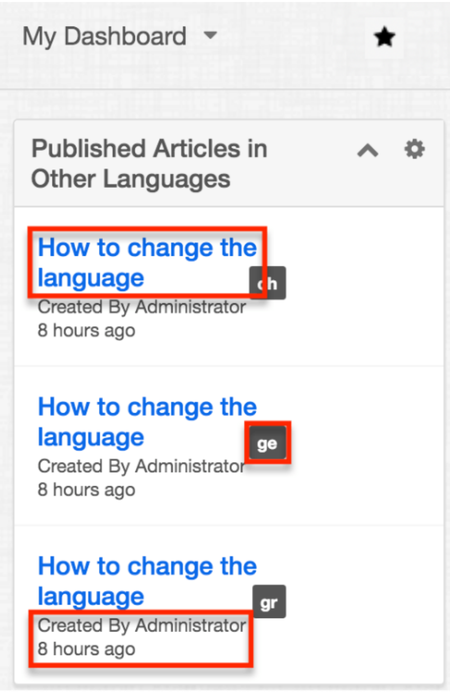
- **Collapse or Expand**: Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
    - **Note**: Administrators can choose to disable the sticky feature and collapse all subpanels by default via Admin > System Settings. For more information, please refer to the User Interface section of the System documentation in the Administration Guide.
- **Column Widths**: Place your cursor on the column divider and, when the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- **Column Sort**: Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g., from ascending to descending).
- **Create a New Localization**: Click the Plus button on the upper right of a subpanel to create a new localization for the article you are currently viewing.
    - **Note**: Because creating a new related record opens a draw on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- **Favorites Designation**: Click the star on the left of a record's row to toggle it as a favorite. A dark grey star indicates that the record is a favorite while a white star indicates it is not. For more information, please refer to the User Interface page.
- **Hyperlink Fields**: Blue field values, such as record names, may be clicked to open the record in record view. Record view provides a complete picture of the record and is described in detail in the User Interface page. Email addresses also appear in blue and can be clicked to compose an email to that recipient.
- **Record Actions Menu**: Click the triangle on the right of a record's row to access the Record Actions Menu which includes the following options:
    - **Preview**: To preview a record by displaying its fields and activity stream in the right-hand side drawer, click the Eye icon to the far right of the record's row. For more information, please refer to the User Interface page.
    - **Create Revision**: To create a new revision of the localized article, choose "Create Revision" from the actions menu on the far right of the record's row, then complete the record view layout and click "Save".
    - **Edit**: To inline edit the record directly within the subpanel, choose "Edit" from the Actions menu on the right of the record's row and

click "Save" to preserve the changes.

- **More Records**: By default, Sugar displays up to five records in each subpanel though administrators can alter the number via Admin > System Settings as described in the System documentation in the Administration. If additional related records exist, click "More <Module Name>..." (e.g., "More Accounts...") at the bottom of the subpanel to load the next set.

Published Articles in Other Languages Dashlet

The Published Articles in Other Languages dashlet displays all published localization articles related to the current article you are viewing. From this dashlet, you can view who created each localization and when they created it, as well as which language is related to each localization via the language code icon located to the right of the article's name. This two-letter icon corresponds with the language code you administrator has specified in the Settings. To access an article's record view, click on the article's name directly from the dashlet.



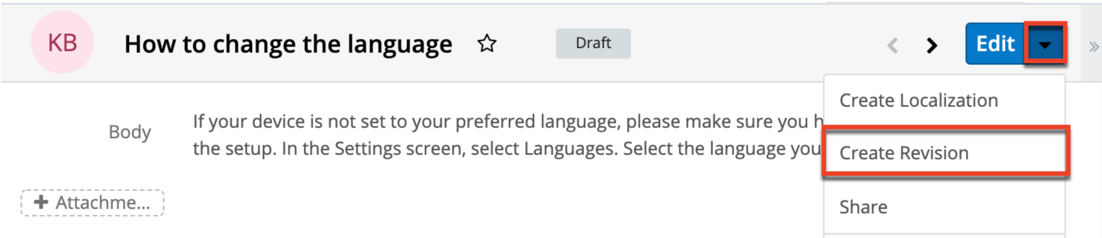
Article Revisions

As you improve or update your knowledge base content, Sugar allows you to create revisions. Revisions are a set of articles that are versions of the same content. They allow you to keep a history of past versions as well as to make content changes without affecting the published version. One revision of each set of related revisions will be designated as the active revision using the Active Revision checkbox. Only article revisions with the Active Revision field checked are displayed in the Knowledge Base list view while the others will only be visible in the Revisions subpanel. If an article is not yet published, creating a new revision will cause the Active Revision designation to transfer to the newest revision. Once an article has been published, the published version will retain the Active Revision designation when new revisions are created. Only when another revision is published in its place will the Active Revision designation be transferred. For more information about how publishing affects revisions, please refer to the Publishing Articles section of this documentation.

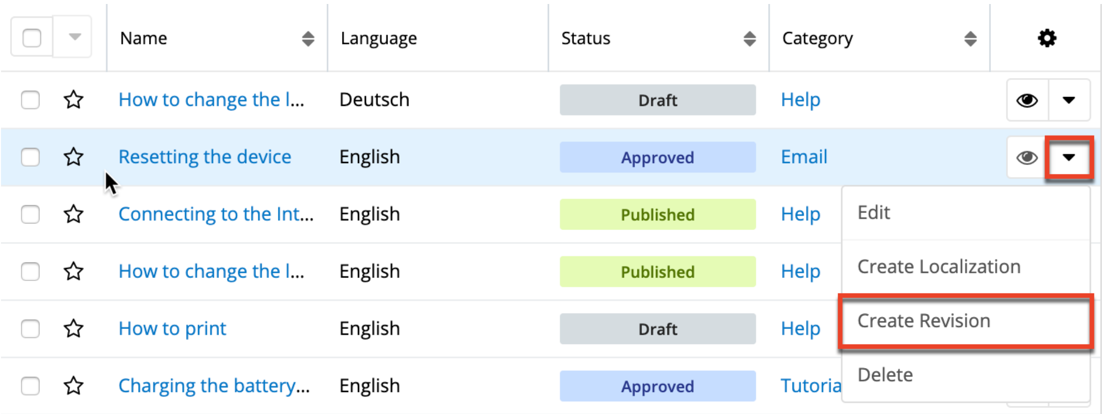
Creating Revision Articles

When a revision is created, it duplicates all fields from the original article except for the Status field, which will default to "Draft". Please note that the Date Created field of all revisions will match the date the original article was created. The Date Modified fields will, however, reflect the most recent edit of the particular revision. A revision can be created from the Knowledge Base list view, the article's record view, the Revisions subpanel, or the Localizations subpanel.

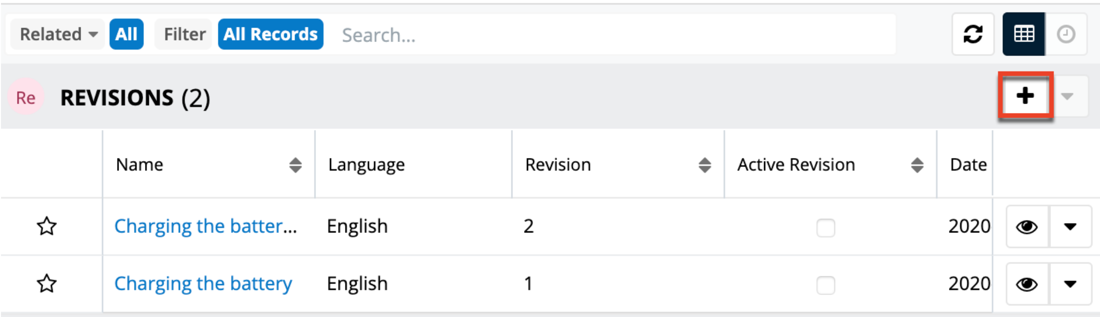
To create a revision from an article's record view, click the Actions menu and select "Create Revision".



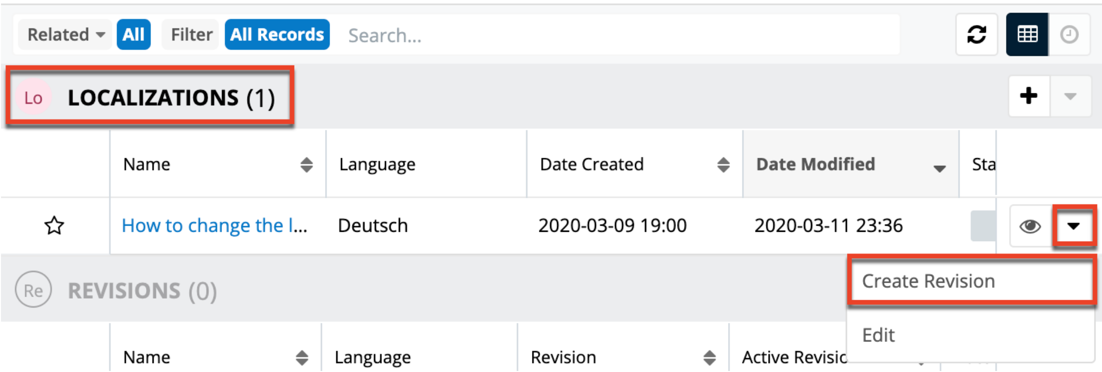
To create a revision from the list view, click the record Actions menu and select "Create Revision".



To create a revision from the Revisions subpanel, click the Plus icon.

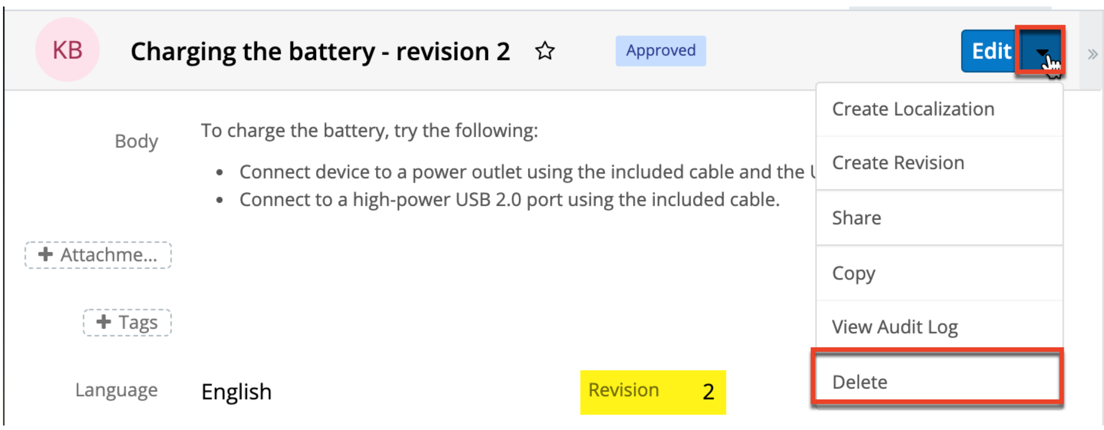


To create a revision from the [Localizations subpanel](), click the record Actions menu and select "Create Revision".



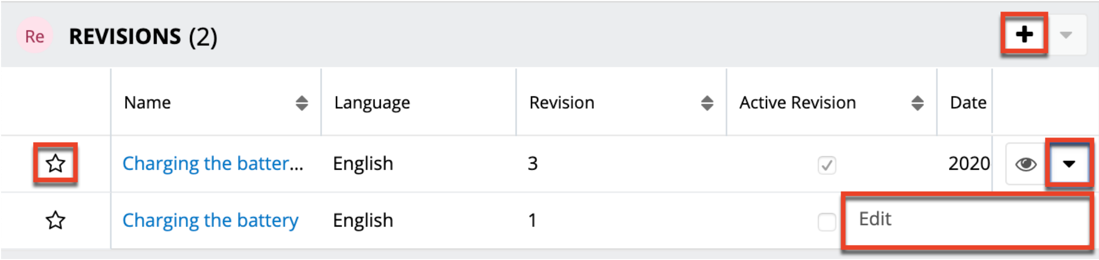
Deleting Revision Articles

Deleting an article from the Knowledge Base list view only deletes the active revision. Another revision, if available, is then promoted to be the active revision. In order to delete an article revision which is not marked as the active revision, you must click on its name in the revisions subpanel, then select "Delete" in the record view's actions menu.



Revisions Subpanel

The Revisions subpanel is available on each article's record view and displays all revisions related to the article. The subpanel allows the following operations to be performed:



- **Revision Article Details**: To view the details of a related revision, click the article's name in the subpanel to open it in record view.
- **Record Count**: Subpanel headers display the total count of related revisions (e.g., "5 of 6+") next to the module name. The count captures the number of revisions currently displayed with an additional, hyperlinked number (e.g., "6+") where there are more revisions than currently displayed. Click the hyperlinked number to see the total count of related revisions.
- **Collapse or Expand**: Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
  - **Note**: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.
- **Column Widths**: Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- **Column Sort**: Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g., from ascending to descending).
- **Create a New Revision**: Click the Plus button on the upper right of the subpanel to create a new revision for the article you are currently viewing.
  - **Note**: Because creating a new revision opens a draw on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- **Favorites Designation**: Click the star on the left of a revision's row to toggle it as a favorite. A dark grey star indicates that the revision is a favorite while a white star indicates it is not.
- **Record Actions Menu**: Click the triangle on the right of a revision's row to access the Record Actions Menu which includes the following options:
  - **Preview**: To preview a revision by displaying its fields and activity

stream in the right hand side drawer, click the Eye icon to the far right of the revision's row.
    - **Edit**: To inline edit the revision directly within the subpanel, choose "Edit" from the Actions menu on the right of the revision's row and click "Save" to preserve the changes.
- **Note**: The new subpanel order will reset when the user's browser cache is cleared.
- **More Records**: By default, Sugar displays up to five revisions in each subpanel, though administrators can alter the number via Admin > System Settings as described in the System documentation of the Administration Guide. If additional related revisions exist, click "More {Module Name}..." (e.g., "More Emails...") at the bottom of the subpanel to load the next set of records.

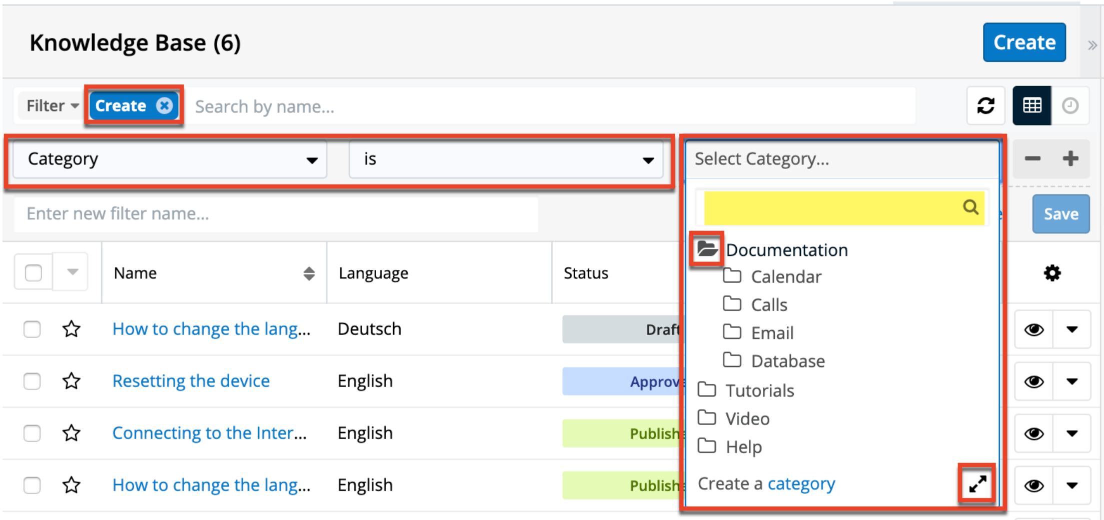
For more information on revisions, please refer to the Revisions section of this documentation.

Article Categories

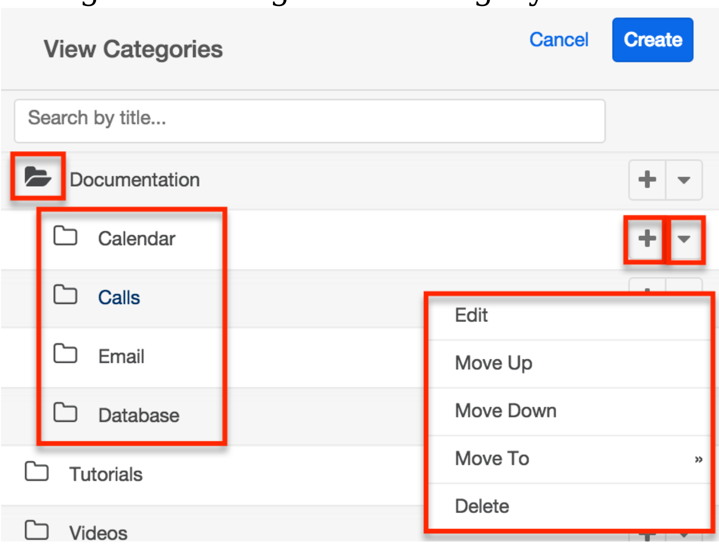
Categories provide a way to group knowledge base articles so that writers, as well as viewers, can easily locate desired articles and related topics. Each article can belong to one category, and a category can have many articles. Categories can also have child or parent categories, allowing for a hierarchical structure of categories and sub-categories. Categories can be viewed in the Categories list view, in the Knowledge Base Categories & Published Articles dashlet, and in the Knowledge Base Search dashlet. Clicking on a category's hyperlink in the Knowledge Base list view or an article's record view will open a drawer containing all articles belonging to that category, providing a convenient way to view and open articles. Alternatively, you can directly filter the Knowledge Base list view for a particular category. For more information about filtering list views, please refer to the Search documentation.

Categories List View

Click the triangle in the Knowledge Base module tab then select "View Categories" from the menu to open the Categories list view.



In the Categories list view, you can view all knowledge base categories and their subcategories by expanding the Categories tree view or search for categories by title in the search bar. Grey folder icons indicate that a category contains subcategories while white folder icons represent categories with no children. Clicking the grey folders, as opposed to the category name, will reveal its subcategories. You can perform actions on an individual category by clicking the triangle to the right of a category's row in the list view.



Each category's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Add Subcategory (Plus icon)	Create a new category as a child of this category.
Edit	Edit the name of the category.

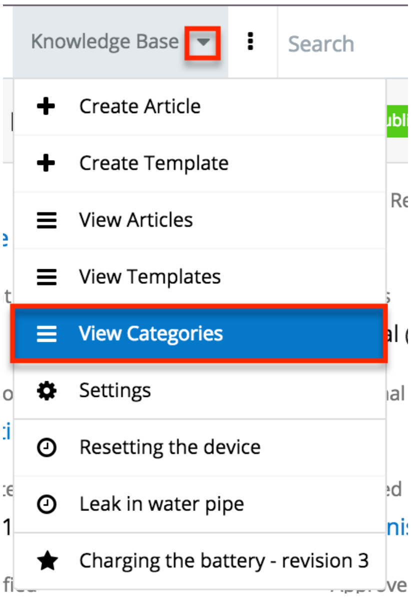
Delete	Delete the category.
Move Down	Move the category down in the tree.
Move To	Move the category to a parent folder.
Move Up	Move the category up in the tree.

Creating Categories

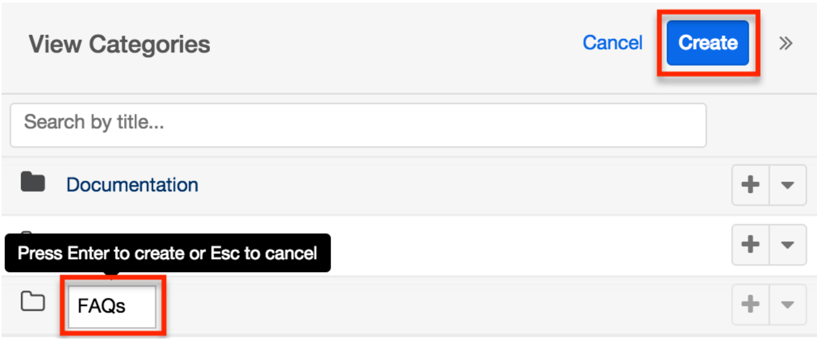
Categories and subcategories can be created from the Categories list view, and top-level categories can be created from the Category field within an article's record view.

Creating via Categories List View

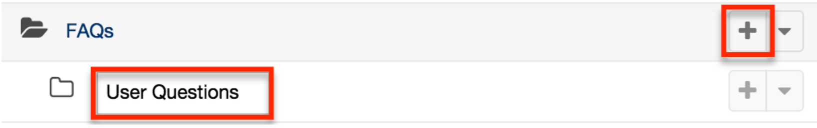
Use the following steps to create a category from the Categories list view:

1. Select "View Categories" from the Knowledge Base module tab's Actions menu.


2. Click "Create" and enter the category name in the new row which appears. Press the Enter key to save.



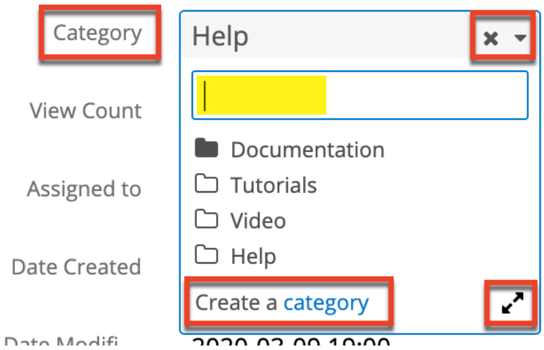
3. To create a subcategory, select the "+" to the far right of the category's row and enter the name of the new child row which appears. Press the Enter key to save.



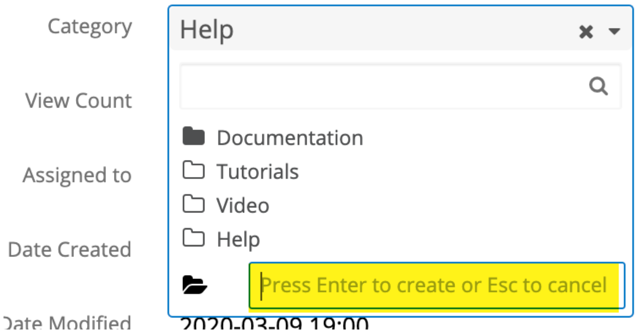
Creating via Category Field

Use the following steps to create a top-level category from the Category field while creating or editing a knowledge base article. Please note that this method does not allow for creating subcategories:

1. Create a new article or edit an existing article in the Knowledge Base module.
2. Click the Categories field and select "Create a category" in the bottom left corner of the dropdown.



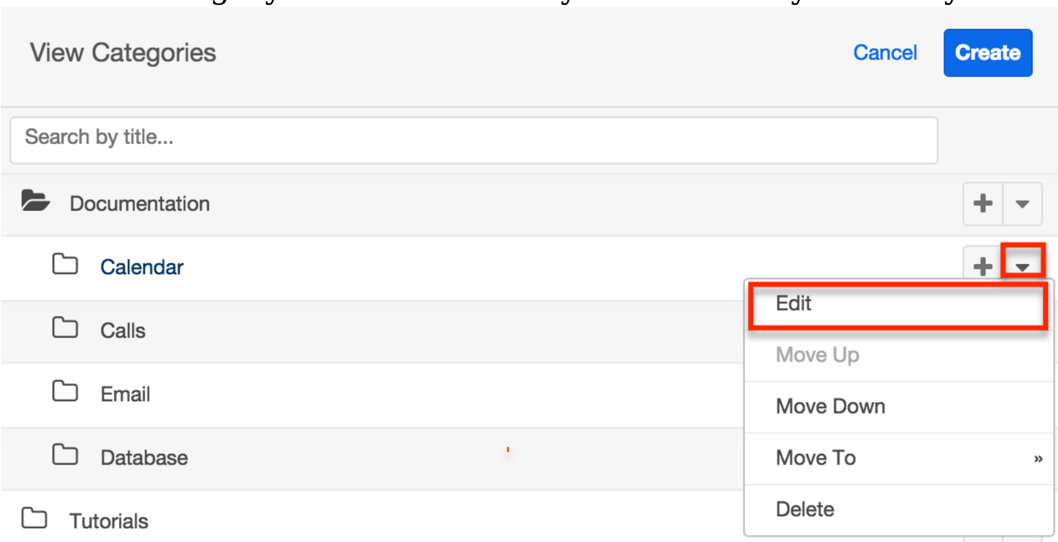
Alternatively, select the expand icon located in the bottom right corner to open the Search and Select Categories drawer and click "Create" in the top-right corner of the drawer that opens.
3. Type the desired category's name into the open text box which appears and press the Enter key to save the new category.



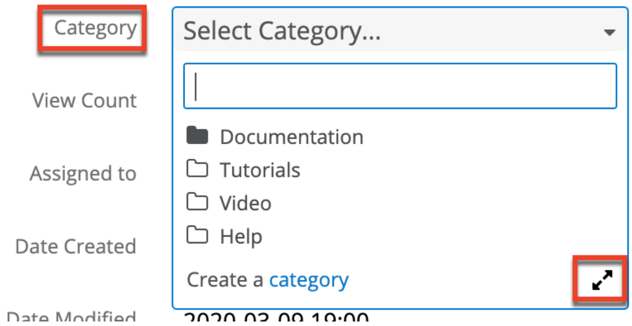
4. Select the new category's name in the dropdown to select it for the current knowledge base article. If you do not wish to change the category of the current article, click outside of the Category field's dropdown.

Renaming Categories

Categories may be renamed via the Categories list view and the Categories field in an article's record view. To rename a category from the Categories list view, simply click the triangle to the far right of the category row and select "Edit". Type the new category name followed by the Enter key to save your change.



You can also rename categories while editing or creating an article. Click the category field to open the dropdown and select the Expand icon located in the bottom right corner. The drawer that opens allows categories to be renamed similarly to the list view. After renaming desired categories, you can click "Cancel" or select a category to relate to the current article.



Moving Categories

Users can change the order and hierarchy of categories via the [Categories list view](). Categories and subcategories can be moved up, down, or into a different folder. This can be accomplished through the drag and drop method or through the move options in the Record Actions menu.

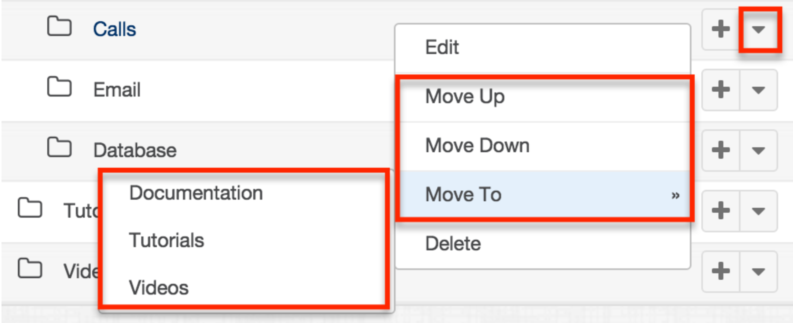
Moving via Drag and Drop

To drag and drop a category to a new position in the Categories tree view, click and hold the category and drag it to the desired location. A category can be moved into a new position in the main tree view or into a different folder. A checkmark will appear beside the category name when the category is in a successful drop position.

Moving via Record Actions Menu

To move a category using the Record Actions menu, click the triangle located on the right of the category's row. The menu presents the following three options for moving categories:

- **Move Up**: Moves the category up one position within its current folder
- **Move Down**: Moves the category down one position within its current folder
- **Move To**: Moves the category to be the child of another category

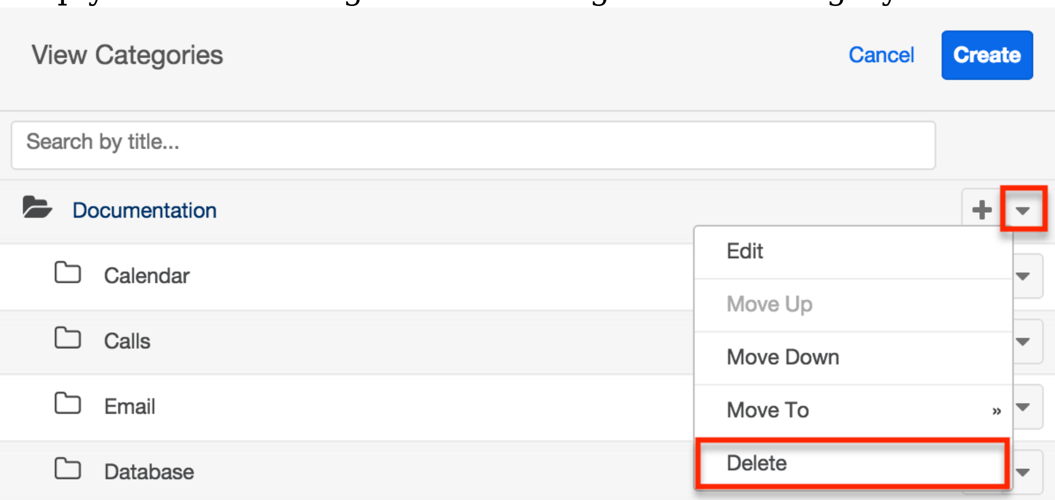


Deleting Categories

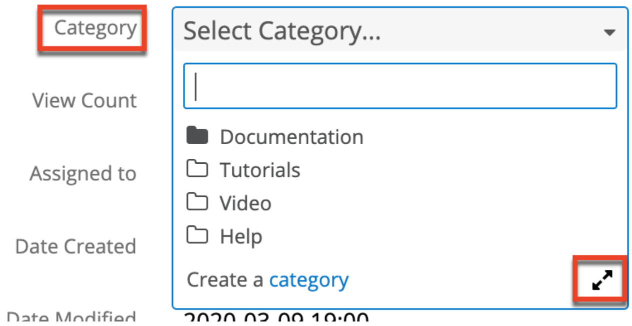
Categories can be deleted via the Categories list view and the Category field in an article's record view. Use caution when deleting a category because it will not only delete the current category, it will also delete all of its subcategories. When a category is deleted, any articles belonging to the category will have empty Category fields. While the Category field is not required, it is useful for organizing articles. It is recommended to associated articles be assigned a new category using mass update prior to the deletion.

Note: When a parent category is deleted, all subcategories are automatically deleted as well.

To delete a category and its child subcategories from the Categories list view, simply click the triangle to the far right of the category row and select "Delete".



You can also delete categories while editing or creating an article. Click the category field to open the dropdown and select the Expand icon located in the bottom right corner. The drawer that opens allows categories to be deleted similarly to the list view. After deleting unwanted categories, you can click "Cancel" or select a category to relate to the current article.



Working With Sugar Modules

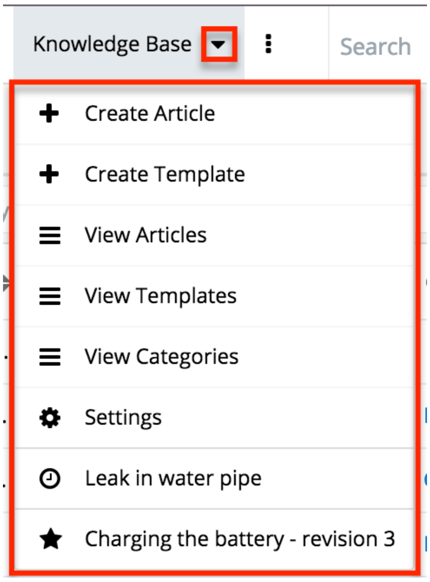
While the Knowledge Base module has some features that only apply to knowledge base records, it also uses the Sidecar user interface that most Sugar modules are based on. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Article Menus

The Knowledge Base module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Knowledge Base-specific functionality, within this page.

Module Tab Menus

The Knowledge Base module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Knowledge Base" to access the list view. Once the Knowledge Base tab is visible in the navigation bar, you may click the triangle in 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 articles you most recently viewed. The Favorites menu displays the list of Knowledge Base records you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Article	Opens the record view layout to create a new article.
Create Template	Opens the record view layout to create a new template. **Note**: This option is only available to administrators.
View Articles	Opens the list view layout to search and display articles.
View Categories	Opens the list view layout to search and display categories.
View Templates	Opens the list view layout to search and display templates. **Note**: This option is only available to administrators.
Settings	Opens the Knowledge Base language-configuration settings. **Note**: This option is only available to administrators.

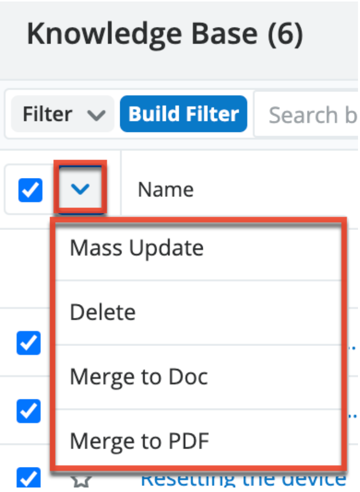
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Knowledge Base list view displays all knowledge base records and allows for searching and filtering to locate specific articles. You can view the basic details of each record within the field columns of the list view or click an article's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual article records or click the checkbox in the list header to select all records displayed on the current set of list view results.



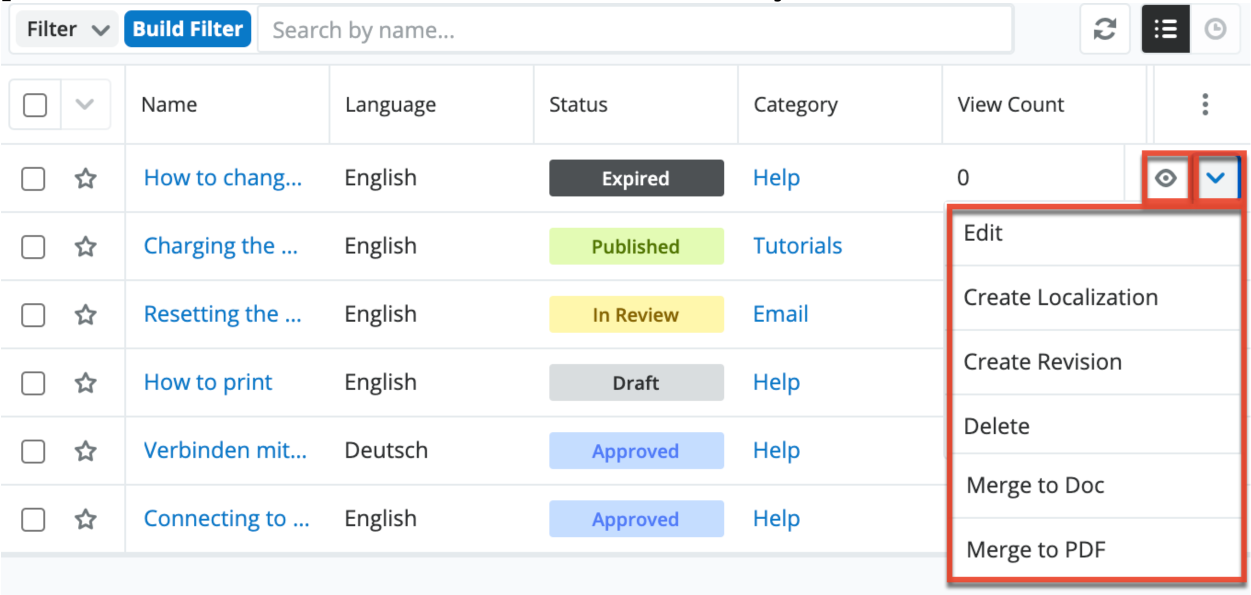
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more articles at a time.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Delete	Delete this article.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.

[Merge to PDF](#)	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual article directly from the list view.



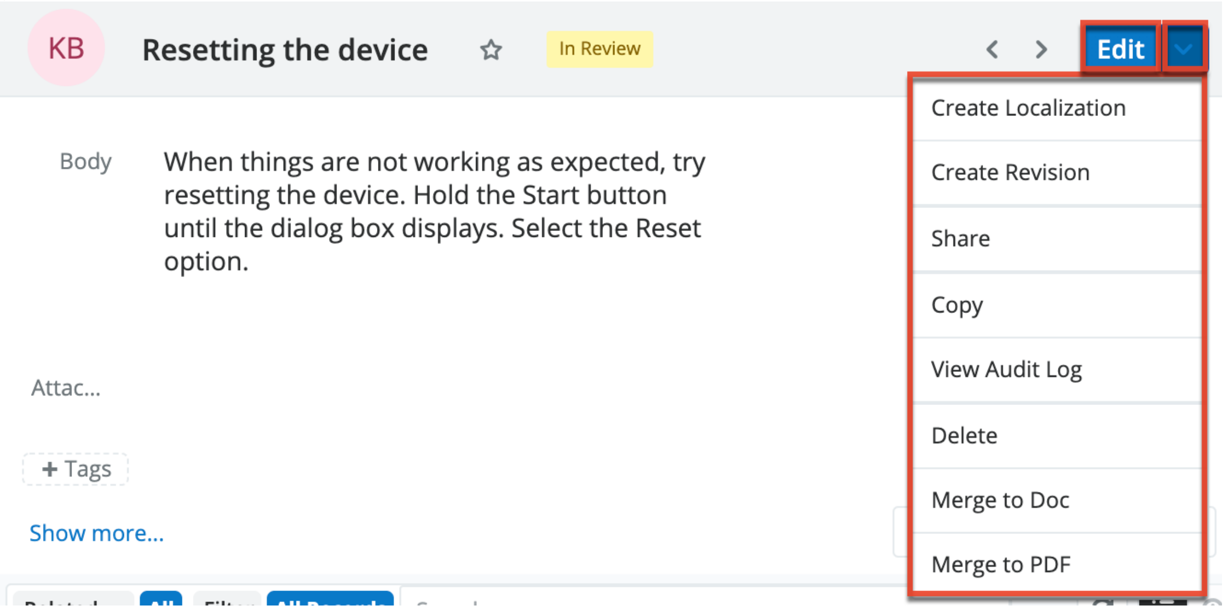
The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
[Edit](#)	Edit this article.
[Follow](#)	(Available if [Activity Streams](#) are enabled) Follow changes to this case/call/bug/etc. in your activity stream.
[Create Localization](#)	Copy this article in order to adapt it for a different audience via another language.
[Create Revision](#)	Create a new or corrected version of the original article.
[Delete](#)	Delete this article.
[Merge to Doc](#)	Select or create a DOCX, XLSX, or PPTX

	template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Knowledge Base record view displays a single article in full detail including its fields, subpanels of related records, and activity stream. To access an article's record view, simply click a hyperlinked article name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this article.
Create Localization	Copy this article in order to adapt it for a different audience via another language.
Create Revision	Create a new or corrected version of the original article

Share	Share a link to this article via email. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Download PDF	Download the record's information as a PDF file. • This menu option is only visible if the administrator has created a PDF template for the Knowledge Base module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.
Email PDF	Email the record's information as a PDF attachment. • This menu option is only visible if the administrator has created a PDF template for the Knowledge Base module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Copy	Duplicate this article.
View Audit Log	View a record of changes to this article's fields.
Delete	Delete this article.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX

	template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to knowledge base articles.

General Instructions for Working With Sugar Modules	**Knowledge-Base-Specific Instructions**
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Knowledge-Base-specific help exists for each topic, use the links below to navigate to sections of the current page.
Creating Records	Article Templates Creating Categories
Viewing Records	Viewing Published Articles by Category
Searching for Records	Article Categories
List View	List View Mass Actions Menu List View Record Actions Menu Categories List View
Record View	Record View Actions Menu
Intelligence Pane	Viewing Article Ratings Viewing Useful Published Articles Published Articles in Other Languages Dashlet
Editing Records	Publishing Articles Article Attachments Article Localizations Article Revisions Renaming Categories Moving Categories
Deleting Records	Deleting Revision Articles Deleting Categories
Viewing Record Audit Logs	
Record PDFs	

Favoriting Records	
Following Records	
Sharing Records	
Using the TinyMCE Text Editor	

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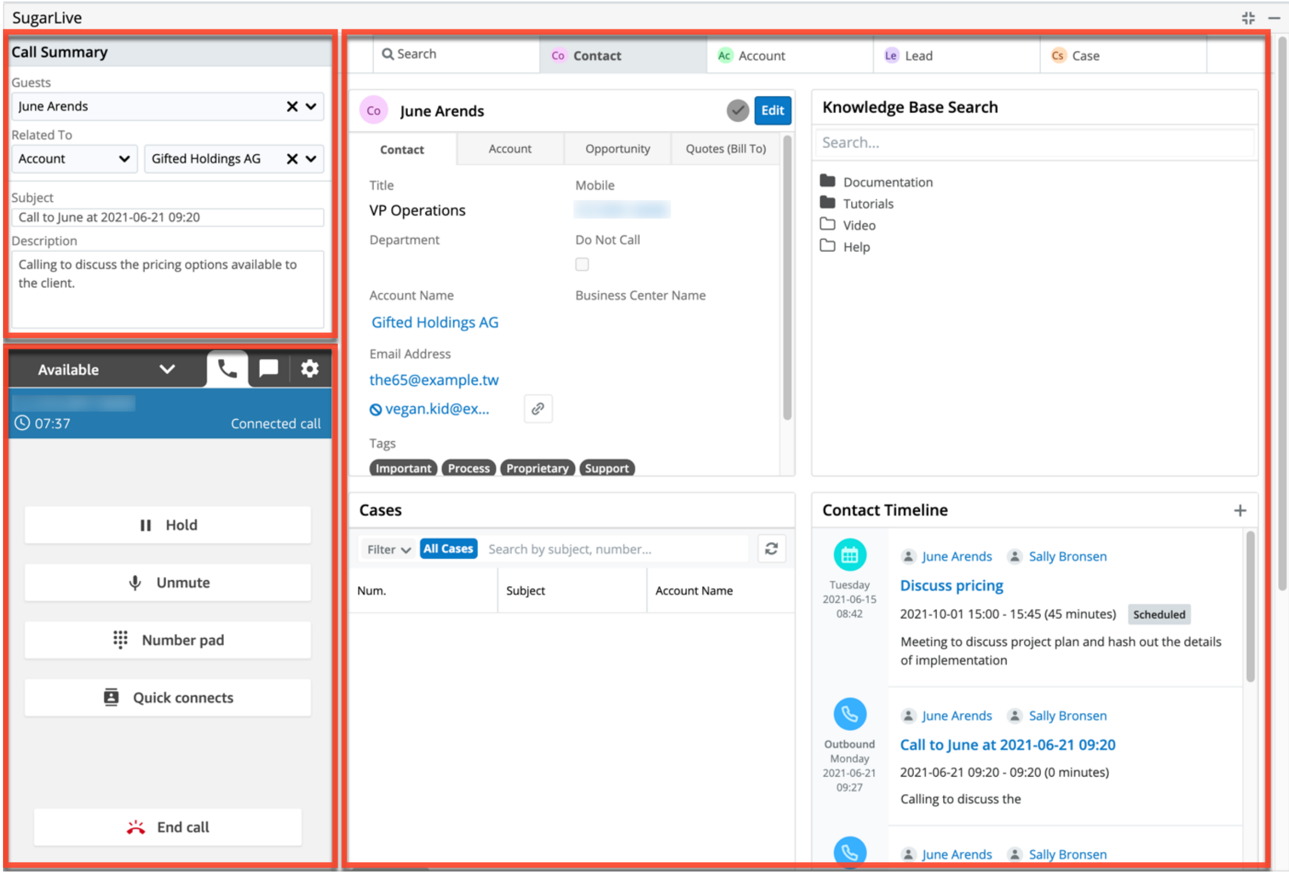
SugarLive

Overview

SugarLive, available to users with a Sugar Serve 11.0 and higher or Sugar Sell 11.3 and higher license type, is an omnichannel tool for customer service agents and sales team members to communicate in real-time with customers. While the user is in a call or chat with the client, relevant customer information is available at all times to be viewed and updated without navigating away. To use SugarLive, your organization must have an Amazon Connect account because Amazon Connect is used to route incoming calls and chats to SugarLive. See the Prerequisites section for more details.

Please note that you will only be able to see tabs, dashlets, and records as allowed by your license type, team membership, assigned roles, and user access type. For more information, please refer to the referenced documentation in the Administration Guide.

Accessible in Sugar's footer, SugarLive comprises two sides. On the left side are the Summary panel, where a few key details on the current call or chat are available to view and edit, and the Communication panel, where you can accept incoming calls and chats and carry them out. The right side is the Detail panel and contains a tabbed dashboard that allows you to find, view, and update records in Sugar to help you efficiently assist the customer you are talking to. In this panel, the Search tab lets you find the record(s) associated with the customer you are working with so that you can open them in SugarLive. The module tabs (e.g., Contact) each present a holistic view of that record, providing you with the tools needed to find information, aid the customer, and track the details of your encounter. SugarLive can be viewed in a variety of dynamic ways throughout a chat or call session.



Prerequisites

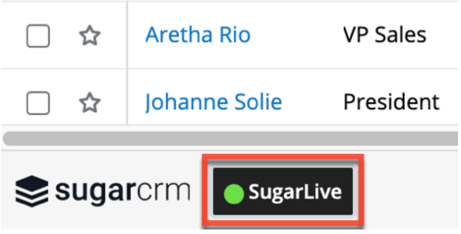
SugarLive's [Communication panel]() uses Amazon Connect to handle incoming calls and chats. As a result, SugarLive can only be used after an admin has configured your organization's Amazon Connect instance and connected it to Sugar. See the [Amazon Web Services]() page in the Administration Guide for details on this configuration.

To access SugarLive in the footer, you must have the following:

- A Sugar Serve or Sugar Sell [license type]()
- An Amazon Connect user account in your organization's Amazon Connect instance
- A web browser that is supported for use with SugarLive. For more information, refer to the [Supported Platforms]() page.
- Role access to the Calls and Messages modules

Accessing SugarLive

You can access SugarLive by clicking the icon in the footer:



If you cannot see the icon in the footer, contact your administrator to ensure that you have a Sugar Serve or Sugar Sell license type and that your Sugar instance has been set up to connect to your organization's Amazon Connect instance.

If you are not logged in to Amazon Connect, the SugarLive icon is grey. The icon turns green upon login and remains this way whether your status is set to "Available" or "Offline". When you have at least one call or chat open in SugarLive, the footer icon's background changes to black.

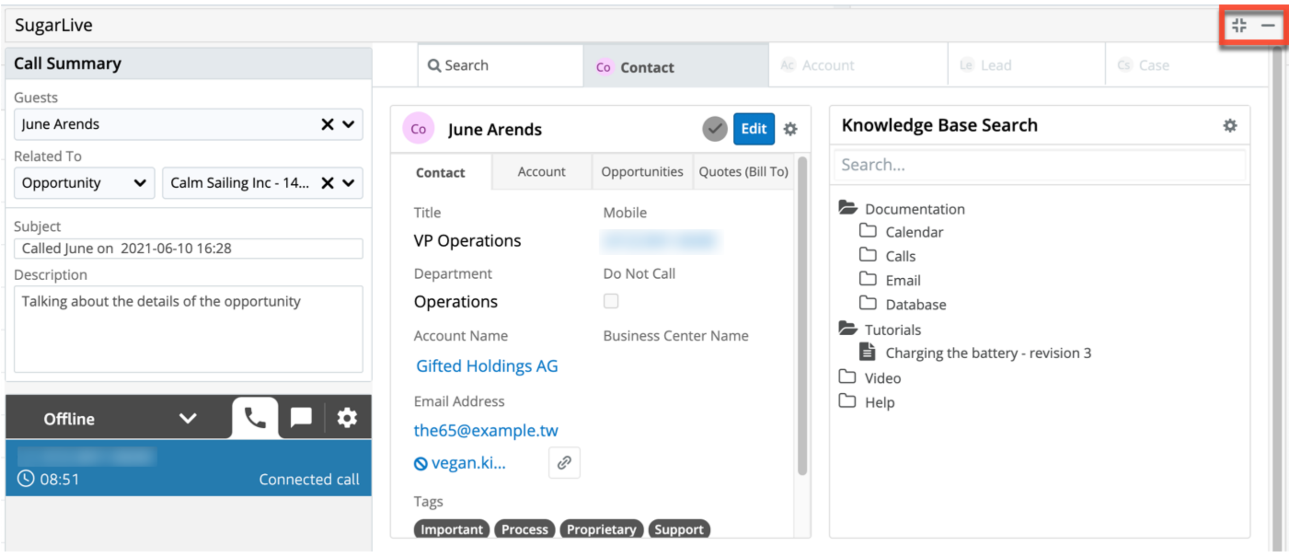
SugarLive Views

SugarLive can be expanded and collapsed to allow you to work with SugarLive and your Sugar data in a variety of dynamic ways throughout a chat or call session. When making an outbound call, SugarLive will default to the view, either full or compact, you were in when your last outbound session ended. When accepting an incoming call or chat, SugarLive will default to the view, either full or compact, you were in when your last inbound session ended. Outbound calls default to compact view and inbound calls and chats default to full view if a prior session view is unknown.

Note: You can navigate within Sugar while in a call or chat but you cannot refresh your browser. Doing so will disconnect the call or chat and discard any unsaved changes in the Detail panel. This is always true, whether you are in an active session or an ended but not yet closed session, and also if SugarLive is in full view, compact view, or minimized.

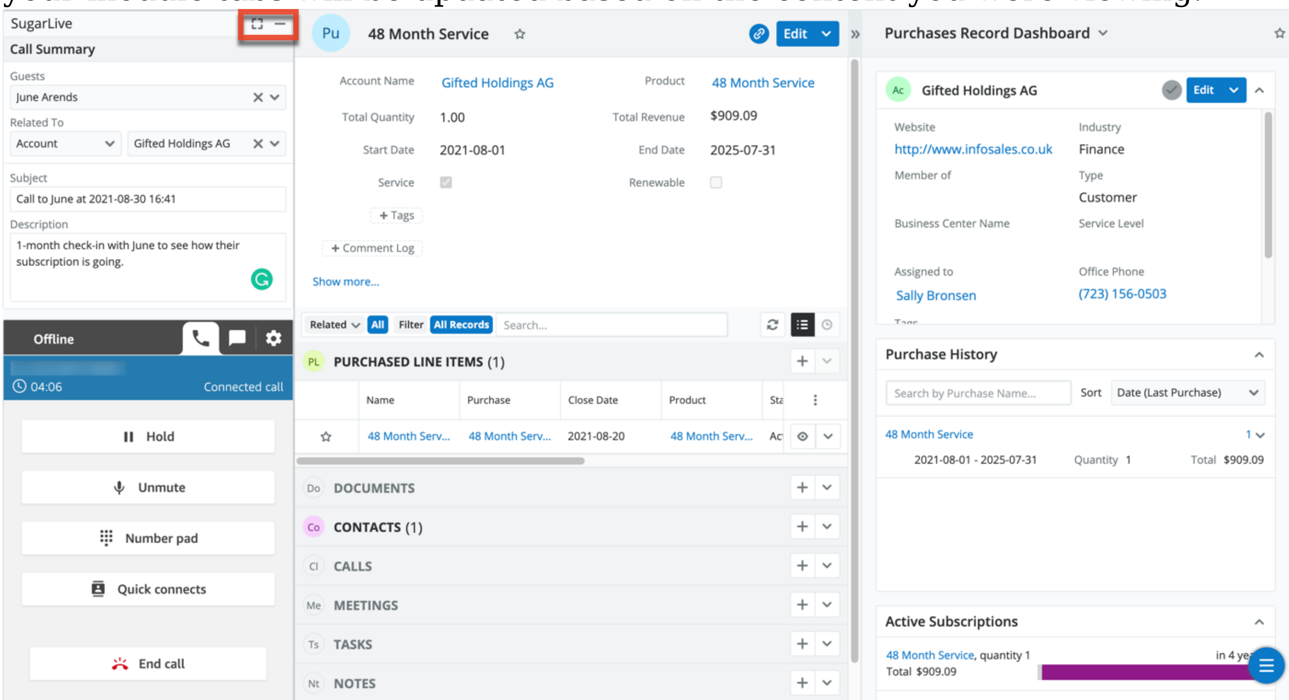
Full View

SugarLive's full view displays the Summary panel, Communication panel, and Detail panel. Work with your Sugar records directly from SugarLive through the available tabs and the dashlets contained in each tab. Enter compact view or minimize SugarLive by clicking the available icons on the top right side of the Detail panel.



Compact View

SugarLive's compact view displays the [Summary panel] and [Communication panel]. Work with your Sugar data throughout the platform while SugarLive remains visible. From compact view, you can [minimize] SugarLive or enter [full view] where your module tabs will be updated based on the content you were viewing.



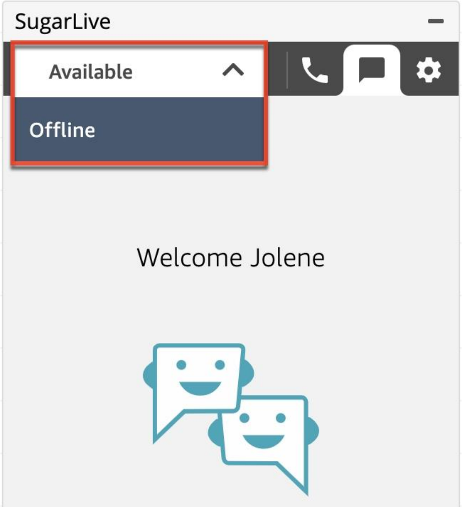
Minimize

To minimize SugarLive, either from compact or full view, use the dash (-) icon in the top right corner. If you receive a new chat message while SugarLive is minimized, the footer icon flashes green until you open it again. If SugarLive is minimized and then opened again, it returns to the view (i.e., full or compact) it was in when minimized.

Logging In

You must be logged in to an Amazon Connect account to receive calls and chats. If you are not logged in, click the SugarLive icon in the footer to open it. The login behavior is different depending on if you are using the standard login or single sign-on authentication.

When you first log in, your status in the Communication panel is set to "Offline", which prevents new chats or calls from being routed to you. Change it to "Available" in the top left corner to make yourself available to new chats and calls. You cannot change your status back to "Offline" when you have active sessions but can after the call or chat has ended and you are still working in the Detail panel and Summary panel.



Your status in the Communication panel is preserved when you log out of Sugar and log back in before your Amazon Connect session has ended. As a result, you may wish to change your status to "Offline" before logging out of Sugar to prevent immediately receiving a new call or chat when you log back in to Sugar.

Standard Login

If your instance is set up for standard login, SugarLive will open a new tab in your browser with the Amazon Connect login page. Simply log in to your Amazon Connect account and then return back to the tab with Sugar open; you will now be logged in to SugarLive and can close the Amazon Connect tab.

Single Sign-On Authentication

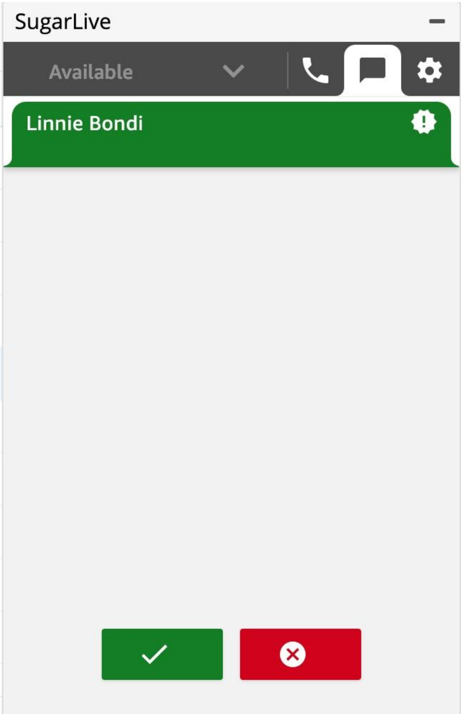
If your Sugar instance and Amazon Connect instance are set up for SAML 2.0-based authentication and you logged in to Sugar using single sign-on (SSO), you will be automatically logged in to Amazon Connect via your identity provider when you open SugarLive. You will remain on the same page and SugarLive will be opened with your Amazon Connect account logged in.

Communication Panel

The Communication panel is a small panel that appears in the bottom left corner when you open SugarLive with no active sessions. It uses Amazon Connect's Contact Control Panel (CCP) to route incoming calls and chats to agents. When a new incoming call or chat has been routed to you or when you have an ongoing session, it and the Summary panel fill the entire left-hand side of the screen with the Detail panel on the right. Between these three panels, SugarLive provides you with the tools you need to work on relevant records in Sugar while talking to the customer.

Accepting an Incoming Chat

When you receive a new customer chat, SugarLive opens and the Communication panel allows you to either accept or reject the chat. If you already have one or more ongoing chats, the Accept and Reject buttons are displayed in a pop-up at the top of the Communication panel instead.



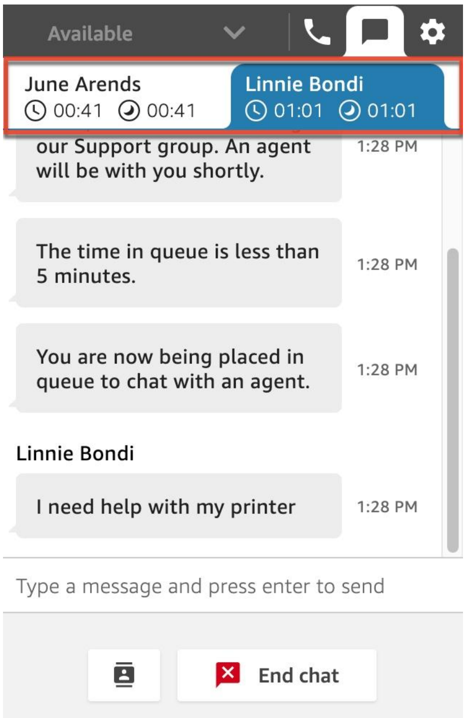
If you are using Sugar Portal Chat, your customers can start a chat session within the portal to chat with a chatbot or connect to an agent in SugarLive. See the Amazon Web Services page in the Administration Guide for the steps needed to set up Sugar Portal Chat and see the Portal User Guide for details on how the portal chat works.

After you accept an incoming chat, a message record is created and populated with certain values, such as the start date, direction ("Inbound"), and the related record(s) (e.g., contact), if known. The conversation opens in the Communication panel and the Detail panel and Summary panel open to fill the rest of the screen. Here, you can see the message from the customer and carry out your conversation while using the other panels to open and update relevant Sugar records. Use the Search tab to find the correct record or use the Quick Create menu in the top right corner of Sugar to create a new one. See the User Interface page for more details on Quick Create.

If the incoming chat is associated with a particular contact or case record in Sugar, those records are automatically opened in the Contact and are linked to the current session's message record. For example, if a customer uses Sugar Portal Chat to contact your Customer Service department, SugarLive matches their portal user with its contact record in Sugar and opens that contact. If the customer speaks with a chatbot about a specific case before asking to connect to an agent, that case is also opened in SugarLive.

If a chat session is started using an external chat window (e.g., on an external website), the chat may be configured to send certain values to SugarLive, such as the contact's name or email address. SugarLive uses these values to open the relevant record(s) in the Detail panel. If more than one record matches the provided name or email address, they are opened in the Search tab instead so you can select the correct one to open.

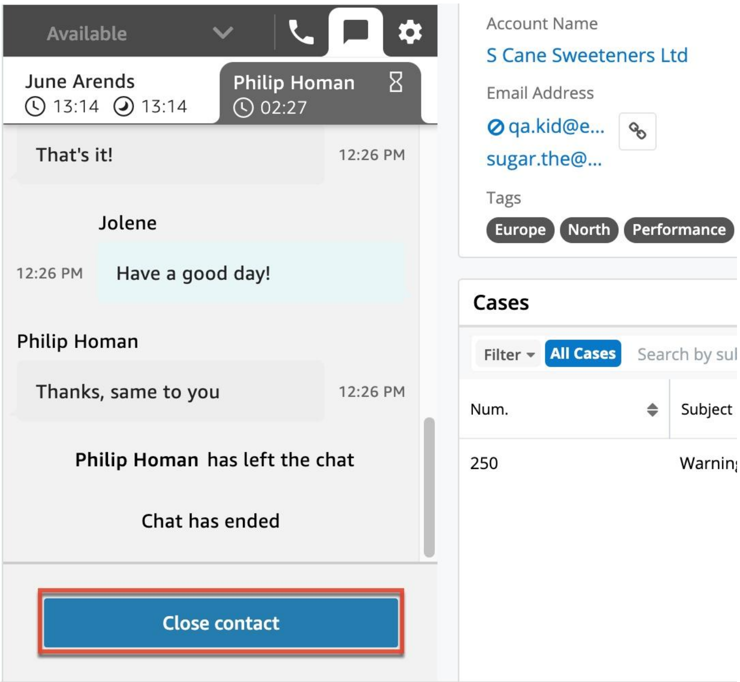
When you have more than one active chat, each chat is displayed as a separate tab within the Communication panel so that you can navigate between conversations. Doing so updates the other panels in SugarLive to show the records you opened while talking to that particular customer. Note that there is a maximum number of chats that you can have open at once, which is configured by your administrator in Amazon Connect. A chat that has ended but is not yet closed counts towards this. If you have the maximum number of chats open, you are not considered available to receive more until you close a contact.



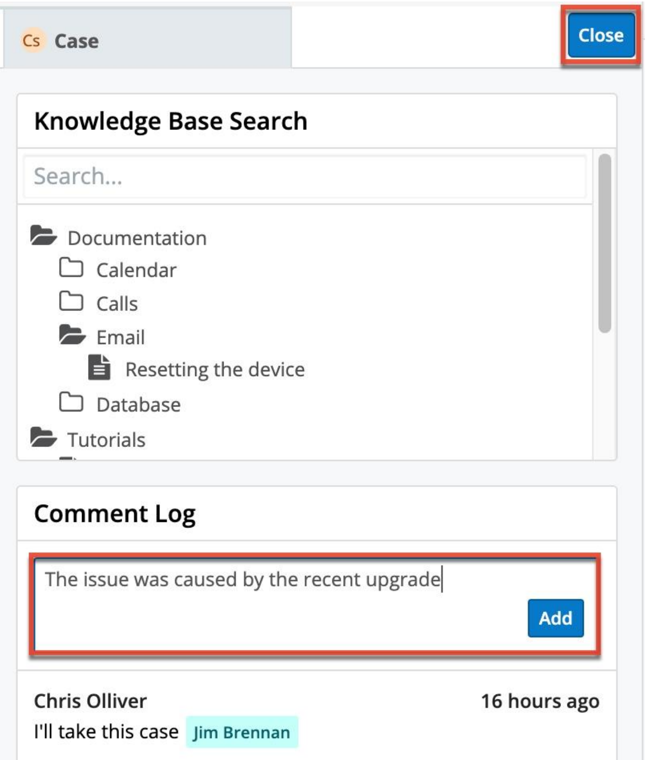
Ending a Chat

To end a chat session, click the End Chat button at the bottom of the Communication panel. When you or the customer ends a chat, the message record is updated with the end time and the Completed status. If the Guests or Related To field is set, this message will appear in the Timeline dashlet when viewing that record. See the Messages documentation for more details on this module and how SugarLive uses it.

After saving the message record, the chat remains open in an inactive state so that you can continue working in the Detail panel and Summary panel to finish updating records after the conversation ends. To close the chat and the records you have open in SugarLive, click the Close Contact button in the Communication panel. Doing so saves the chat transcript in the Conversation field on the message record.

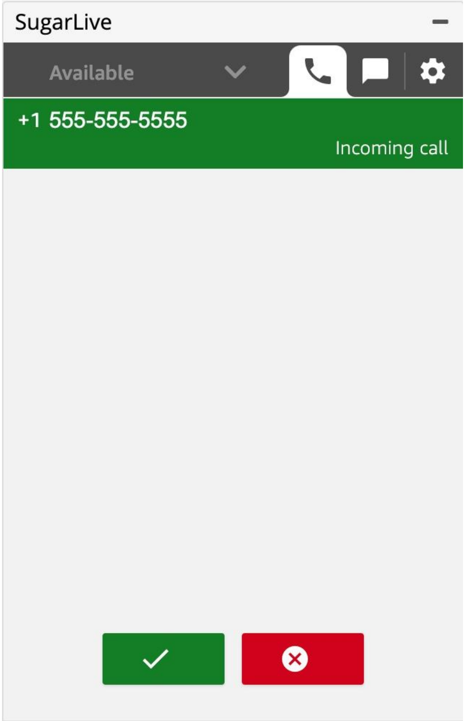


If you have unsaved changes in the Detail panel when you close the contact, you will be asked to confirm before discarding the changes. If you choose to continue editing after the chat is closed, a new Close button appears in the top right corner of the Detail panel. This allows you to close the panel later, after saving your changes, even though the chat itself has already been closed in the Communication panel.

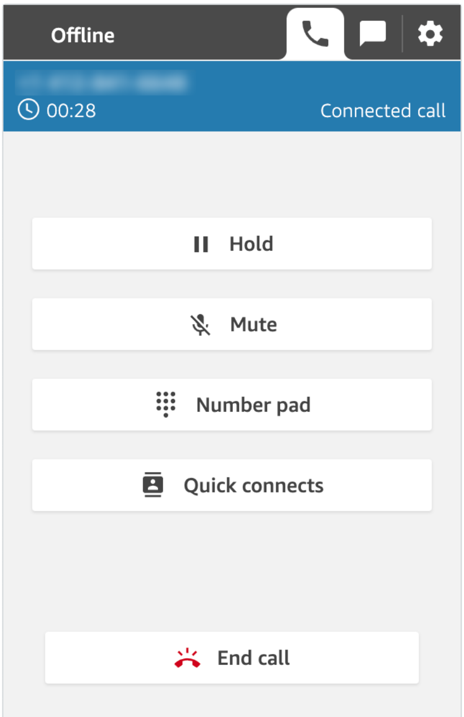


Accepting an Incoming Call

When you receive a new customer call, SugarLive opens and the Communication panel allows you to either accept or reject the call.



After accepting, a call record is created and populated with certain values, such as the start date, direction ("Inbound"), and the related record(s) (e.g., contact), if known. The call opens in the Communication panel and includes basic softphone features such as "Hold", "Mute", and "Number pad". You can also use the Quick Connects button to transfer the call internally or externally. The Summary panel and Detail panel appear above and beside the Communication panel, respectively, to allow you to view and update relevant Sugar records while on the phone with the customer.



When receiving a call, SugarLive will search for a record based on the phone number. For more information on searchable fields, please refer to the Search documentation. If the incoming phone number matches a phone number in a single contact, account, or lead record in Sugar, that record is automatically opened in the respective module tab of the Detail panel so you can view and update their customer information. If there is more than one match in any of the three modules, the records are opened in the Search tab and the contact record will be in focus. If no contact is found, the account record and lastly the lead is prioritized. If there are no matches, you can search for the record in the Search tab or use the Quick Create menu in the top right corner of Sugar to create a new one. See the User Interface page for more details on Quick Create.

If you create a new record using the Quick Create or module tab menu, the Office Phone field is automatically populated with the phone number of the incoming call.

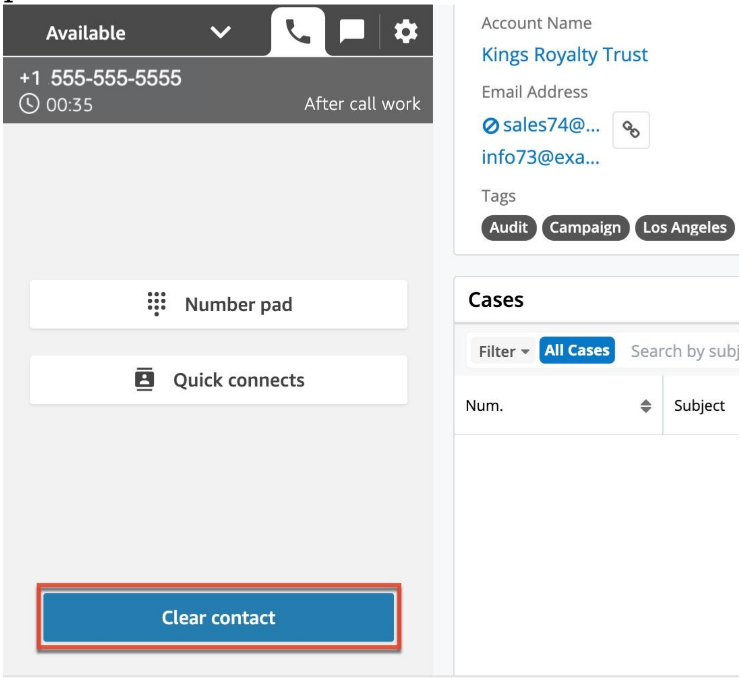
In order for SugarLive to match an incoming phone number to one in Sugar, the phone numbers in Sugar must use a format that is recognizable to SugarLive; the following format is the only consistently recognized format: +10123456789.

It is only possible to have one call at a time, and a call that has ended but is not yet cleared in the Communication panel counts towards this. If you have a call ongoing or open in an inactive state, you are not considered available to receive another call until you clear the contact.

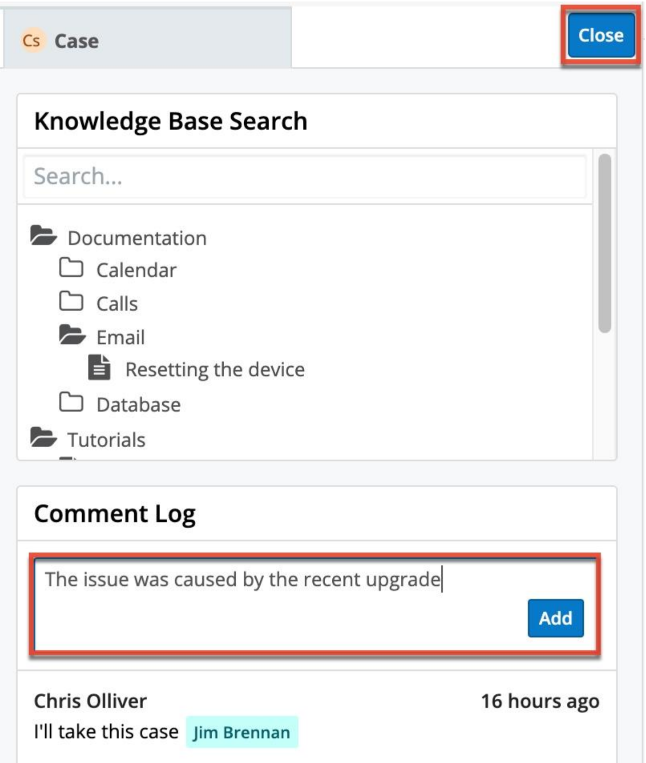
Ending a Call

To end a call, click the End Call button at the bottom of the Communication panel. When you or the customer ends a call, the call record is updated with the end time and the Held status. If an admin has configured call recordings, transcripts, and sentiment evaluations to be saved in Sugar, these values are populated on the call record, although it may take some time for the values to become available. See the Calls page for details on how call recordings, transcripts, and sentiment analysis work in SugarLive.

After the call has ended, the Communication panel remains open with the call in an inactive state so that you can continue working in SugarLive to finish updating records after the conversation ends. To close the call and the records you have open in the other panels, click the Clear Contact button in the Communication panel.

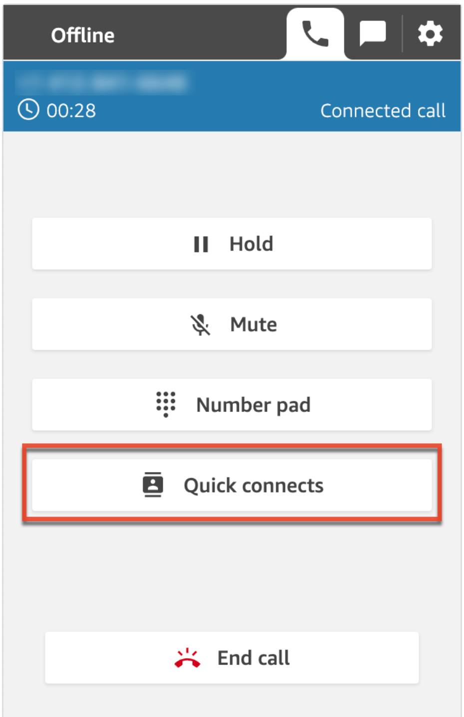


If you have unsaved changes in the Detail panel when you clear the contact, you will be asked to confirm before discarding the changes. If you choose to continue editing after the call is closed, a new Close button appears in the top right corner of the Detail panel. This allows you to close the panel later, after saving your changes, even though the call itself has already been closed in the Communication panel.



Using Quick Connects

Amazon Connect allows an administrator to create quick connects, which are saved call destinations, for agents to transfer an active call to. You can dial a quick connect when making an outbound call or transfer an active call to one by clicking "Quick connects" in the Communication panel. This opens a list of quick connects available for you to use, as configured by an admin.



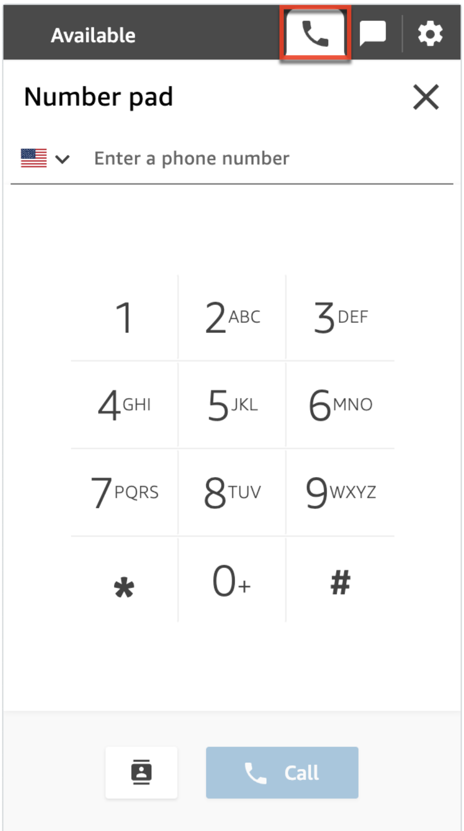
When you use a quick connect to transfer a call, the initial call record is saved in Sugar. When the recipient of the transfer receives the call, the transferred call is saved as a separate record.

Making an Outbound Call

If the Click-to-Call system setting has been enabled by an admin, simply click any phone number field in Sidecar modules in Sugar to call the number using SugarLive. Clicking a phone number in a contact, account, lead, or case record will open the record in the respective tab in the Detail panel, and the record will automatically link to the call. A linked contact or lead record is displayed in the Summary Panel in the Guests field and a linked account or case is displayed in the Related To field. In all other Sidecar modules where a relationship to the Activities module exists, clicking a phone number will automatically link the record to the call record via the Related To field.

Note: You cannot use Click-to-Call to dial if you have any chat sessions open in SugarLive. You also cannot make an outbound call while on another call, including an inactive call before the contact has been cleared.

Aside from using Click-to-Call, you can dial by entering a phone number using the number pad or by typing or copy and paste in the Communication panel of SugarLive. If the dialer is not open when you open SugarLive, simply click the phone icon at the top to open it.

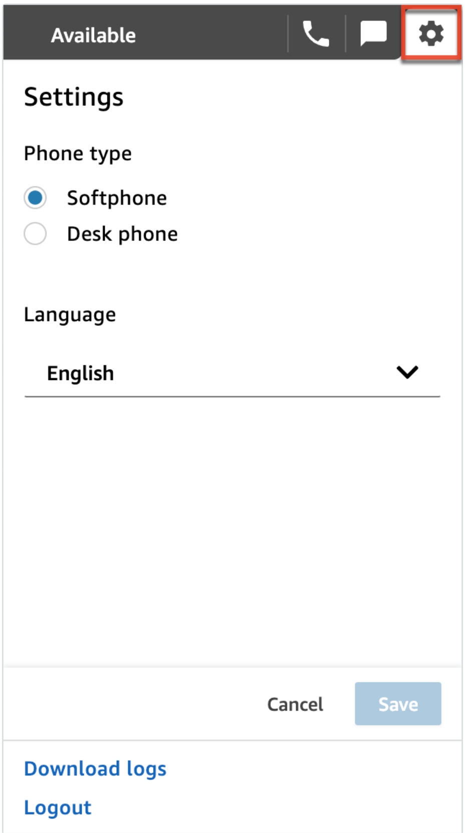


If the number you dial matches a phone number in a single contact, account, or lead record in Sugar, that record is automatically opened in the respective tab(s) of the Detail panel so you can view and update their customer information while on the call. If there is more than one match in any of the three modules, the records are opened in the Search tab and the contact record will be in focus. If no contact is found, the account record and lastly the lead is prioritized. If the number you dial does not match a phone number in any contact, account, or lead records, but you are viewing a Sidecar module record with a relationship to the Activities module (e.g., Opportunities), SugarLive will automatically link the record to the call record via the Related To field.

In order for SugarLive to match an outbound call's phone number to one in Sugar, the phone numbers in Sugar must use a format that is recognizable to SugarLive; the following format is the only consistently recognized format: +10123456789.

Configuring the Communication Panel

Several configuration settings are available in the Settings page of the Communication panel by clicking the gear icon in the top right corner. Here, you can set your phone type (e.g., softphone), choose your language, report an issue, download logs, and log out.



Summary Panel

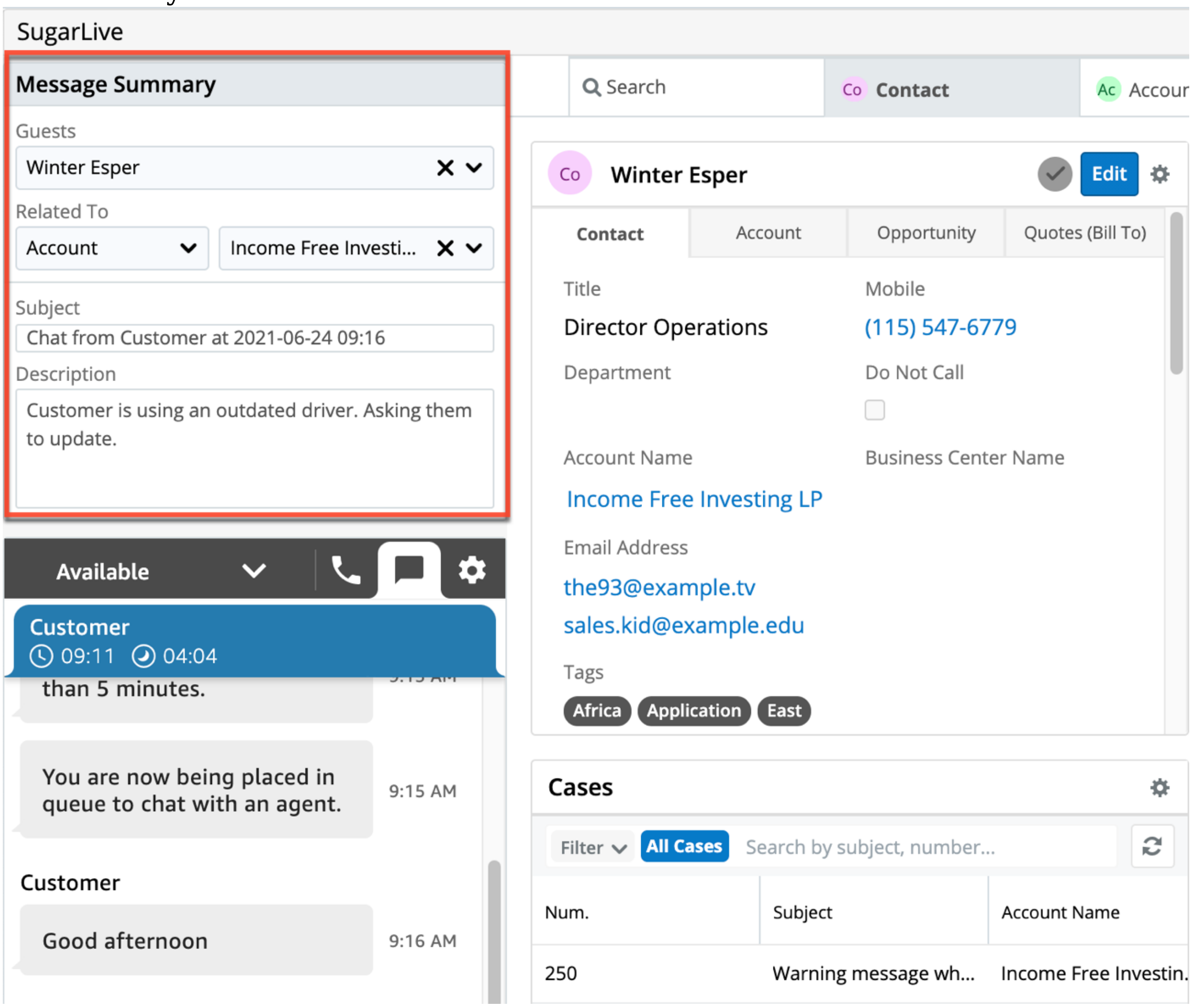
The Summary panel opens when you receive an incoming call or chat in SugarLive and is displayed above the Communication panel. It displays fields from the call or message record for the active SugarLive session to keep relevant information in view and available to edit while you are working. Based on the type of session you have open, the panel title is either "Message Summary" or "Call Summary", and the fields that are displayed for each can be configured by an admin.

In the top part of the panel, the Guests and Related To fields indicate to which record(s) the current call or chat is linked, if any. The Guests field will automatically populate the lead, contact, or user record if identified by SugarLive. If not automatically populated, you can search and select a record from the Leads, Contacts, or Users modules from the Guests field. The Related To field can be automatically populated if identified by SugarLive (e.g., a customer identifies an existing case number when beginning the chat). The Related To field can be populated with a record from any of the following modules, as allowed by your license type and role restrictions:

- Account
- Contact
- Task

- Opportunity
- Quoted Line Item
- Quote
- Bugs
- Case
- Lead
- Target
- Knowledge Base
- Note
- Purchased Line Item
- Purchase
- Revenue Line Item

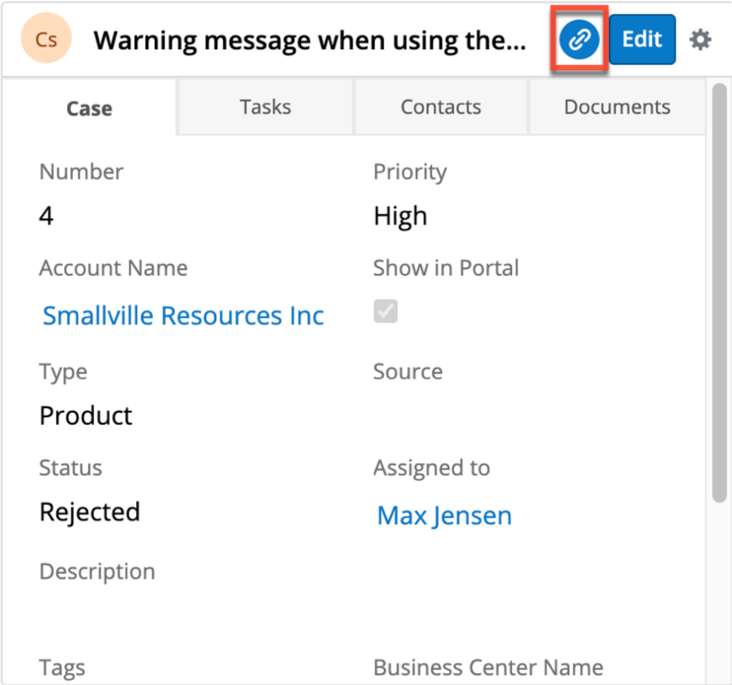
The bottom section of the panel contains auto-saved Subject and Description fields to allow you to easily take notes while talking with the customer. During a chat session, these fields' values are saved on the message record, and during a call, the values are saved on the call record. The value you enter is automatically saved as soon as you click out of the field.



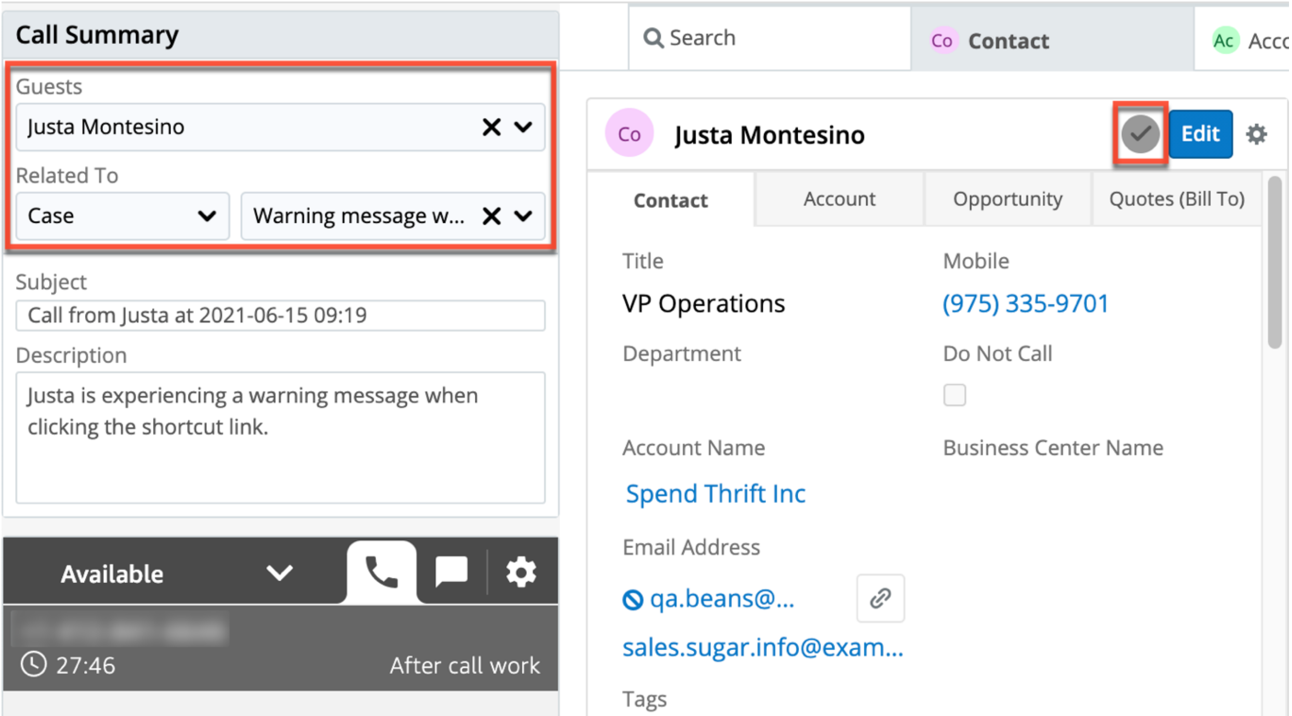
The context of the Summary panel (i.e., which record the field values are displayed for) is maintained whenever you have a specific call or chat open. If you have multiple chats open and switch between them using the tabs in the Communication panel, the Summary and Detail panels' context switches as well so that you always have the right records in view when talking with the customer.

Linking Records

To keep track of the records relevant to a specific encounter, they can easily be related to the call or message record for the SugarLive session via the Link button.



This Link button is displayed in the header of all Record views and single-record tabs of Record View dashlets for all Sidecar modules that have a relationship to the Activities module (e.g., Contacts, Cases, Opportunities, etc). Clicking the button will relate the record to the current call or chat and update the Guests and Related To fields in the Summary panel:



When you link a contact or lead record, the value is automatically saved as a guest on the call or message record at the time you add the link and other record types are saved in the Related To field. See the Messages and Calls pages for details on which values SugarLive sets on these modules.

Once a link has been added, the Link button becomes disabled and the link cannot be removed, but it can be replaced by opening a different record and linking it instead. If no record is linked by the end of the SugarLive session, which includes the time when the call or chat is inactive but still open, then no record will be related. However, it is still possible to update the call or message record manually at any time directly in its module.

Detail Panel

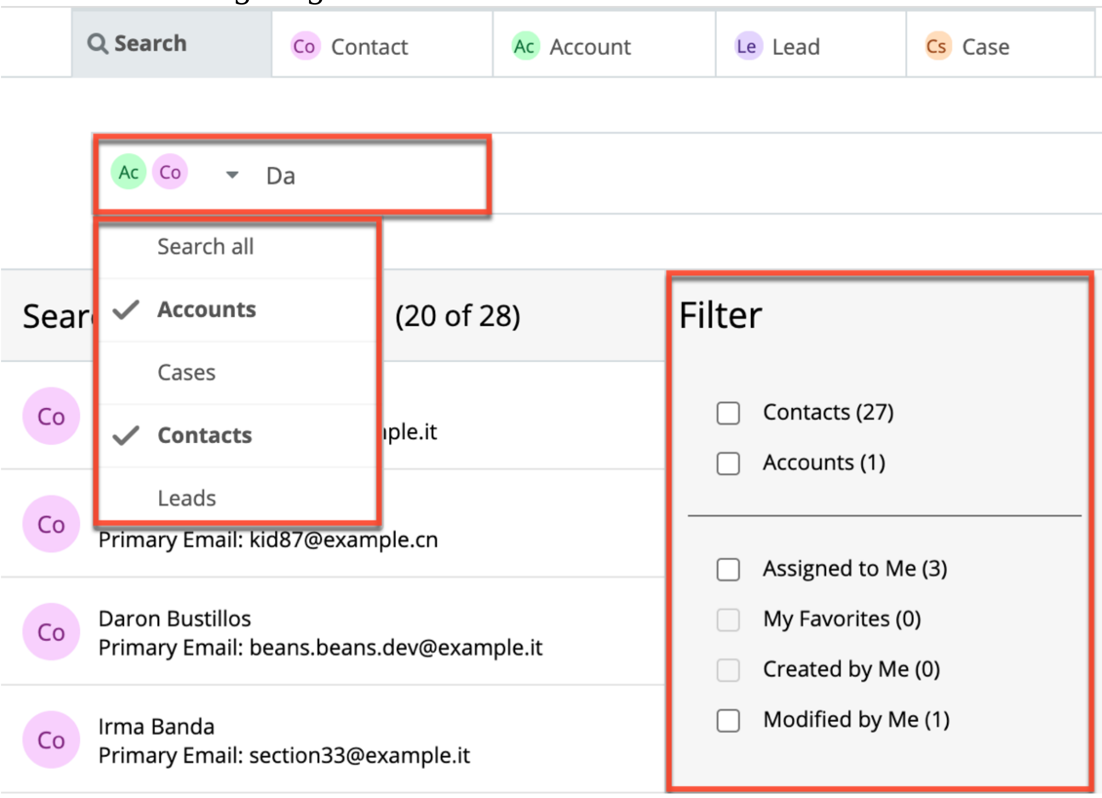
The Detail panel opens when you receive an incoming call or chat in SugarLive and fills the right-hand side of the screen next to the Communication panel and Summary panel. It consists of up to five tabs with fixed layouts: Search, Contact, Account, Lead, and Case; these tabs help you find, view, and update Sugar records while talking to the customer. The sections below discuss the default layouts of these tabs, but the layouts can also be configured by an admin.

Note: You will only be able to see tabs as allowed by your license type, team membership, assigned roles, and user access type. For more information, please refer to the referenced documentation in the Administration Guide.

The context of the Detail panel (i.e., which records are open) is maintained whenever you have a specific call or chat open. If you have multiple chats open and switch between them using the tabs in the Communication panel, the Detail and Summary panels' context switches as well so that you always have the right records in view when talking with the customer. In addition, if you have unsaved changes in a dashlet when switching between chat tabs, the unsaved changes remain when you return for you to complete and save them.

Search Tab

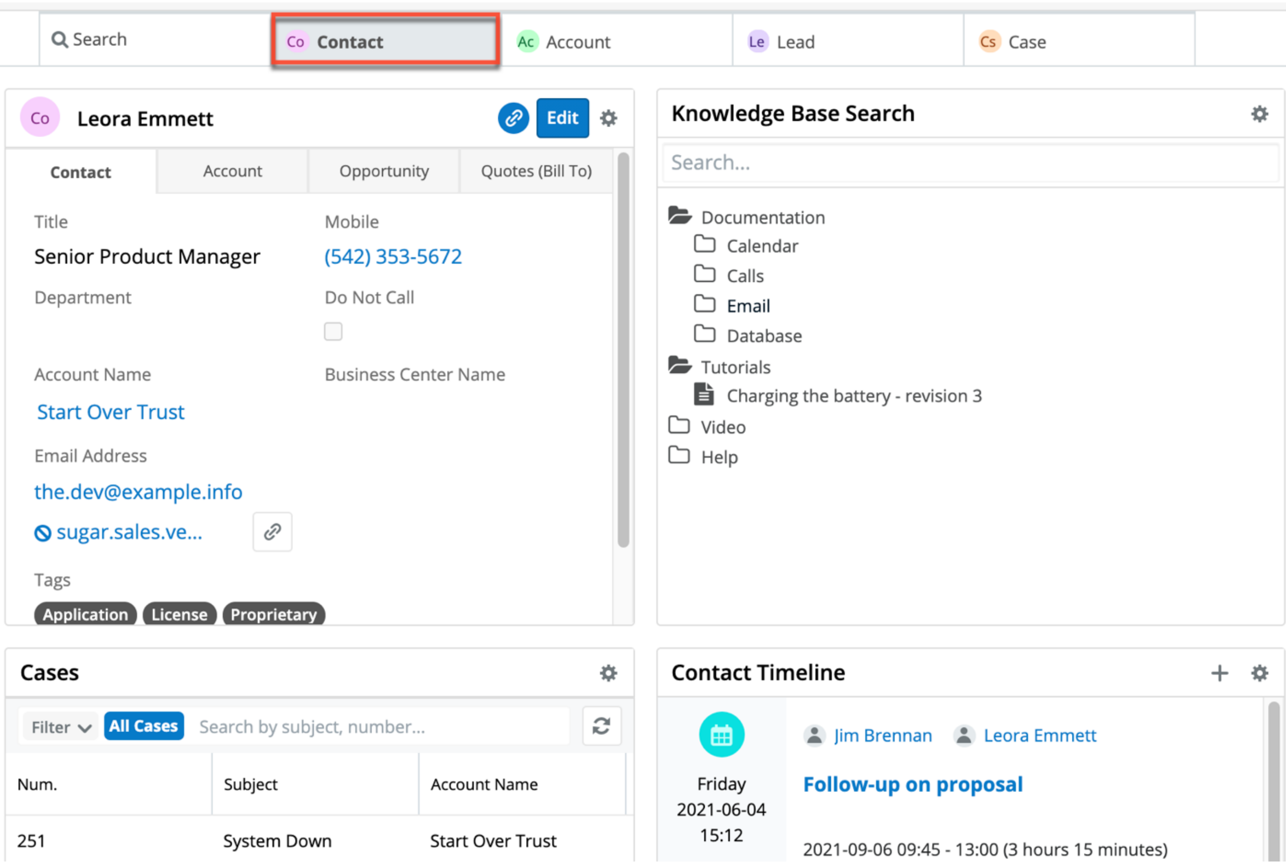
The Search tab contains a search bar at the top to locate records across the Contacts, Accounts, Leads, and Cases modules to locate the record in Sugar associated with the customer you are talking to. Click the down arrow to select which specific module(s) you wish to search. The right side contains additional filter options. Clicking a record in the search results opens them in their respective tabs within the Detail panel so that you can view information relevant to the record without leaving SugarLive.



Contact Tab

The Contact tab provides an overview of the customer and the tools needed to help them without leaving SugarLive. This tab is disabled until a contact has been opened. When a contact is automatically opened by a call, manually opened via the

Search tab, or created using the Quick Create menu in the top right corner of Sugar, it is opened in this tab. In addition, other related and useful information is displayed by default, including a searchable view of the knowledge base and a list of interactions with the contact. The dashlets on this tab can be configured by an admin.

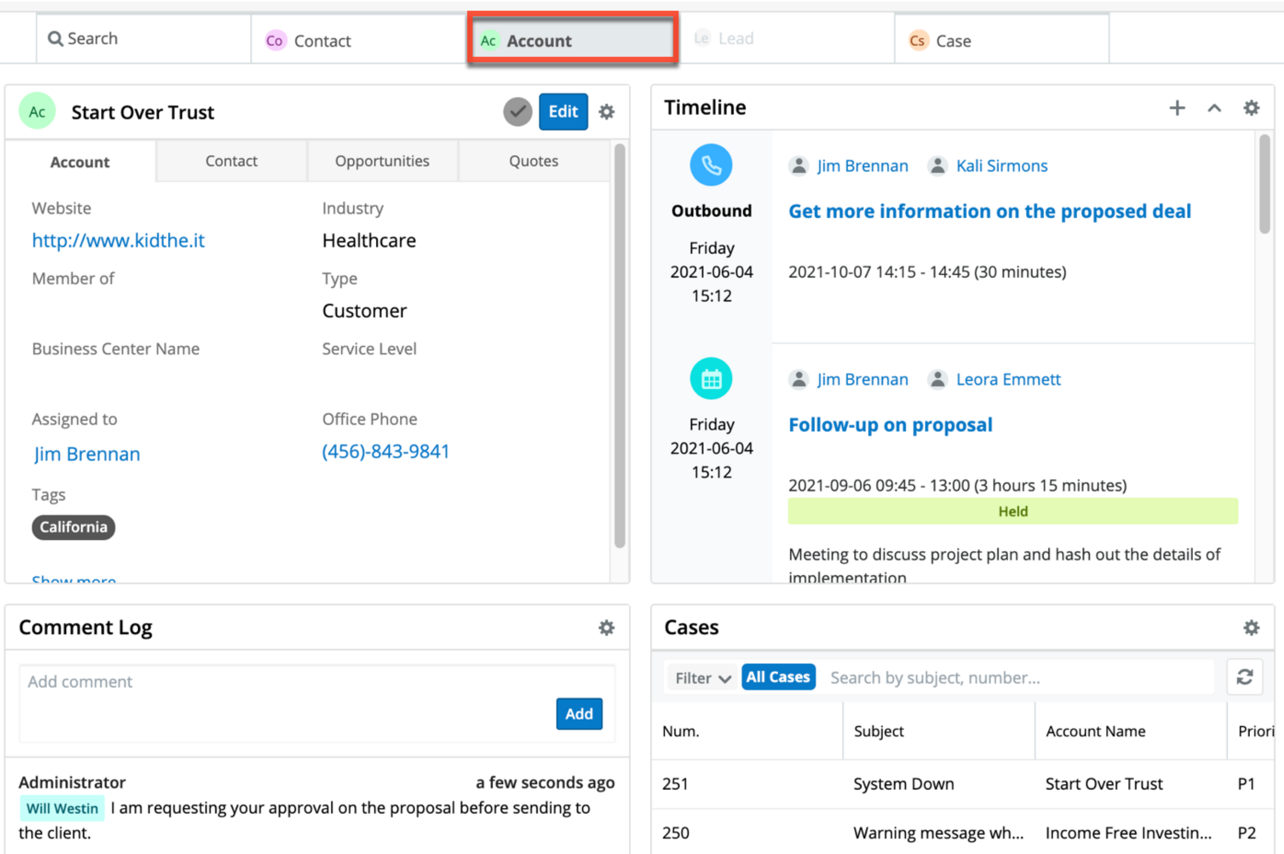


The context of the tab's dashlets (i.e., which contact the dashlets are displaying data for) is maintained whenever you have the current call or chat open. If you have multiple chats open and switch between them using the tabs in the Communication panel, the Contact tab's context switches as well so that you always have the right records in view when talking with the customer. Read more about the four dashlets it contains in the following sections:

- Contact Record Dashlet
- Knowledge Base Search Dashlet
- Contact Timeline Dashlet
- Purchase History Dashlet
- Active Subscriptions Dashlet

Account Tab

The Account tab provides an overview of an account and the tools needed to help them without leaving SugarLive. This tab is disabled until an account has been opened. When an account is automatically opened by a call, manually opened via the [Search tab](), or created using the Quick Create menu in the top right corner of Sugar, it is opened in this tab. In addition, other related and useful information is displayed by default, including a timeline of interactions with the account. The dashlets on this tab can be [configured by an admin]().

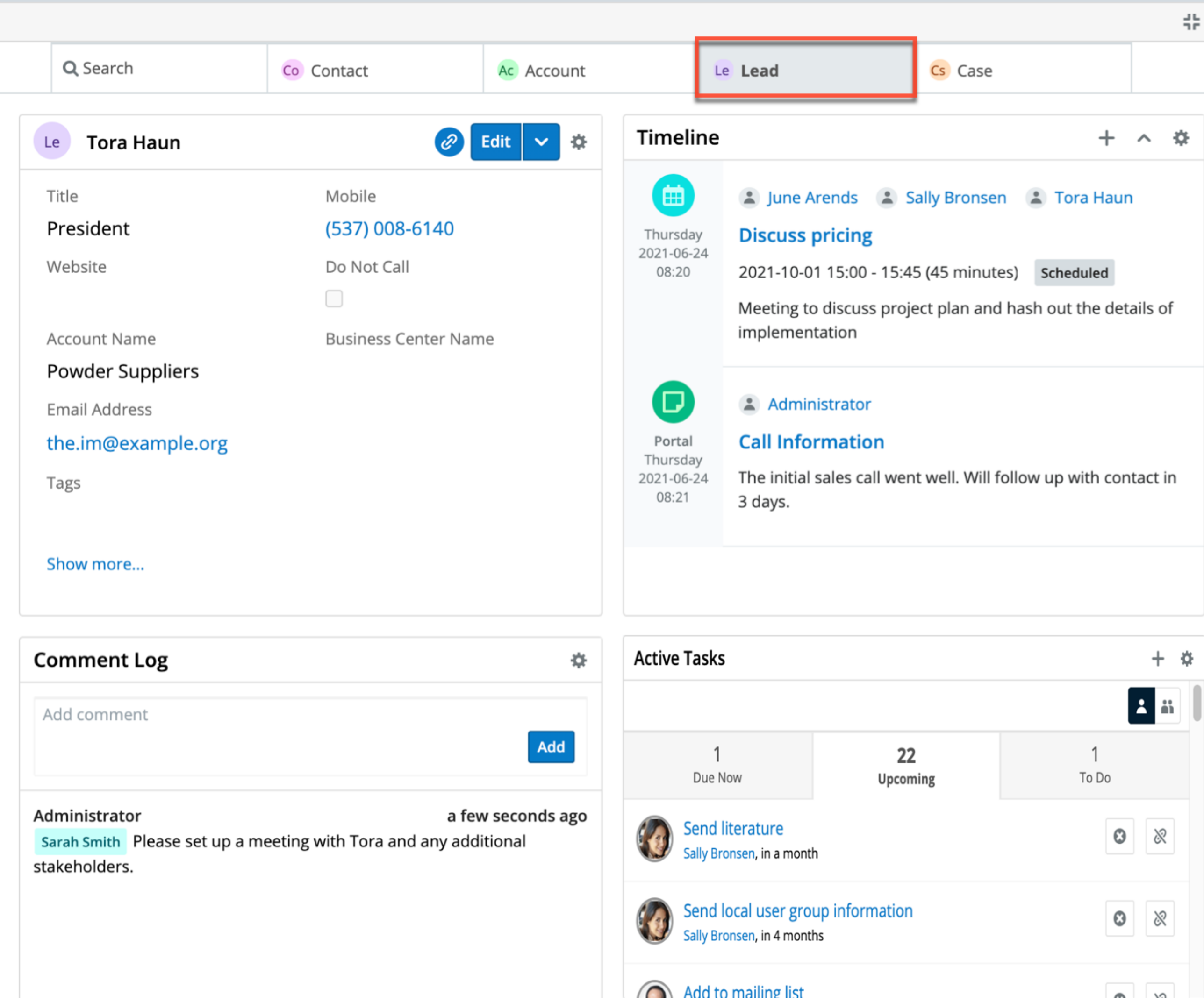


The context of the tab's dashlets (i.e., which account the dashlets are displaying data for) is maintained whenever you have the current call or chat open. If you have multiple chats open and switch between them using the tabs in the [Communication panel](), the Account tab's context switches as well so that you always have the right records in view when talking with the customer. Read more about the four dashlets it contains in the following sections:

- [Account Record Dashlet]()
- [Account Timeline Dashlet]()
- [Comment Log Dashlet]()
- [Purchase History Dashlet]()
- [Active Subscriptions Dashlet]()

Lead Tab

The Lead tab provides an overview of a lead and the tools needed to help them without leaving SugarLive. This tab is disabled until a lead has been opened. When a lead is automatically opened by a call, manually opened via the Search tab, or created using the Quick Create menu in the top right corner of Sugar, it is opened in this tab. In addition, other related and useful information is displayed by default, including a timeline of interactions with the lead. The dashlets on this tab can be configured by an admin.



The context of the tab's dashlets (i.e., which lead the dashlets are displaying data for) is maintained whenever you have the current call or chat open. If you have multiple chats open and switch between them using the tabs in the Communication panel, the Lead tab's context switches as well so that you always have the right records in view when talking with them. Read more about the four dashlets it contains in the following sections:

- Lead Record Dashlet

- Timeline Dashlet
- Comment Log Dashlet
- Active Tasks Dashlet

Dashlets

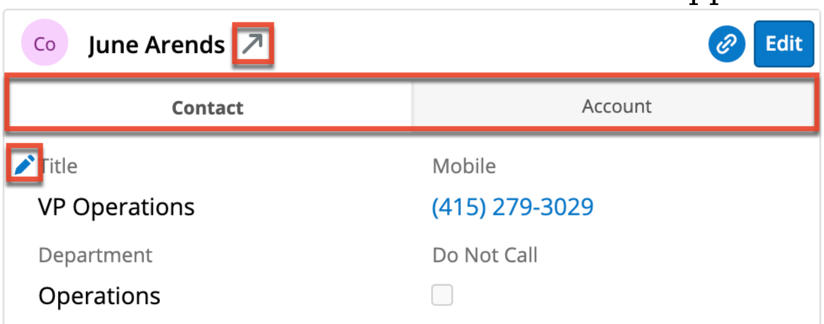
The Detail panel of SugarLive contains a variety of dashlets by default in a fixed three-tab layout to help you serve the customer while talking to them in the Communication panel. The sections below outline each of these dashlets and how they can be used. An admin can also configure the layouts of these dashlets within each tab.

Note: Although regular users can edit some of these dashlets outside of SugarLive, none of the dashlets are available for editing by regular users in SugarLive. An administrator must configure the dashlets if changes are required.

Record View Dashlet

By default, on the top left of the Contact, Account, Lead, and Case tabs is a Record View dashlet. The dashlet displays the relevant record type and fields for the record you have open during the current call or chat. In addition, the Contact, Account, and Case Record View dashlets are all configured to display additional tabs containing related records. During a SugarLive session, each Record View dashlet has a Link button in the dashlet header. This button can be used to relate the record to the current call or message record. See the Linking Records section of this page for more information.

Records can be edited directly in the dashlet. Additionally, an Actions menu is available in the Record View dashlet for modules that can be escalated. For more information on escalting records, refer to the Escalations documentation. If you wish to access the record's full-page record view, simply hover over the name in the dashlet and click the arrow icon that appears to navigate to the record.



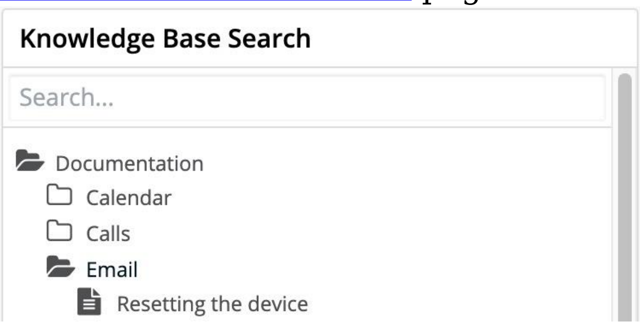
Note that in SugarLive, only administrators can change the tabs displayed in

Record View dashlets. For more information, refer to the Record View dashlet documentation.

Knowledge Base Search Dashlet

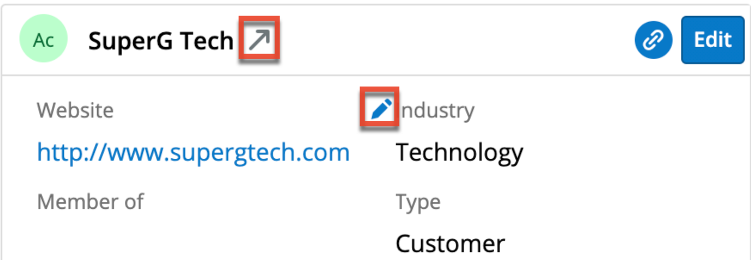
The Knowledge Base Search dashlet is displayed in the top right corner of both the Contact tab and the Case tab by default to give you quick access to published articles that may help in troubleshooting a customer issue. It includes a search bar that lets you find articles with matching titles or contents. To search, simply enter a keyword and a dropdown will appear containing matching articles. Clicking an article opens it in a new browser tab.

Below the search bar, you can see a tree-based view showing the structure of the knowledge base. Here, you can navigate through the folders to browse articles in specific categories and click articles to open them in a new browser tab. See the Dashboards and Dashlets page for more details on this dashlet.



Related Account Record Dashlet

By default, on the bottom left of the Case tab is another Record View dashlet, similar to the top left. Out of the box, this dashlet displays the account related to the case you are viewing, providing additional customer information and the ability to edit the related account without having to navigate from SugarLive. If you wish to access the account's full-page record view, simply hover over the account's name in the dashlet and click the arrow icon that appears to navigate to the record. Note that only administrators can configure Record View dashlets in SugarLive. For more information on this dashlet, refer to the Record View dashlet documentation.

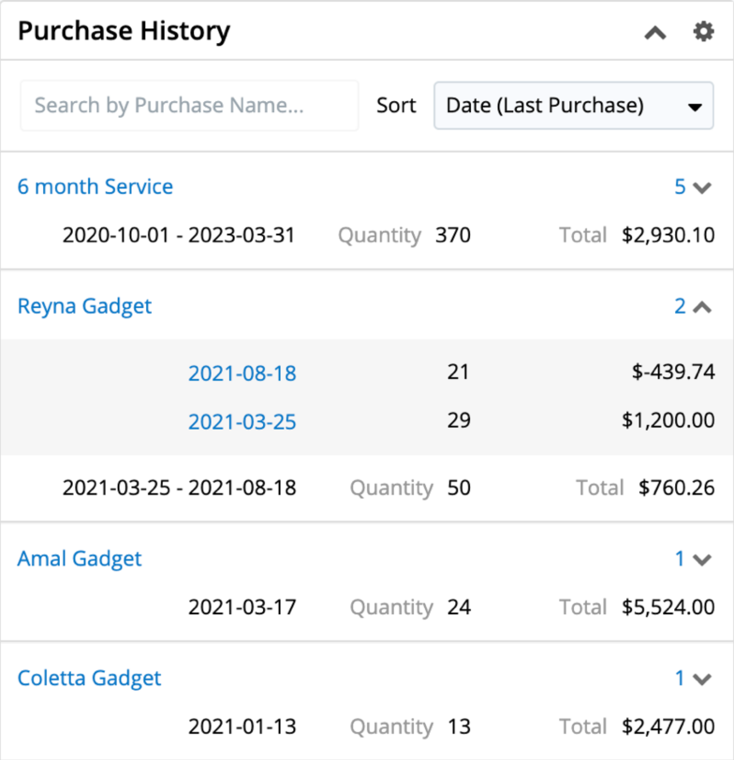


Comment Log Dashlet

This dashlet displays the case's Comment Log field's entries with the most recent entry on top. You can also quickly create new entries by typing in the open text box then clicking the Add button. For more information about comment logs including mentioning records and users, refer to the User Interface page and for details on the Comment Log dashlet itself, see the Dashboards and Dashlets page.

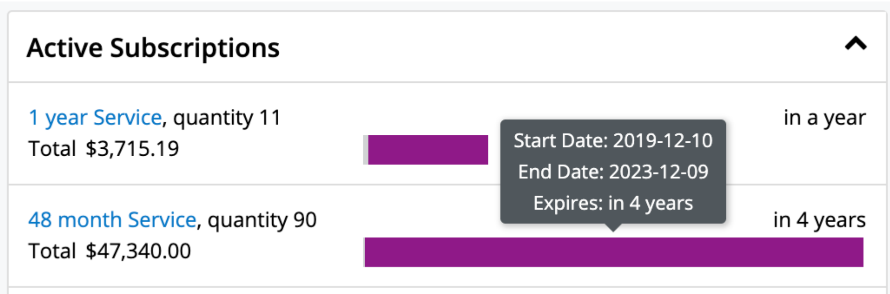
Purchase History Dashlet

By default, the bottom left of the Contact and Account tabs contain the Purchase History dashlet which shows a list of all the current account's purchases regardless of the start or end date of the purchase record. The dashlet shows each purchase's name, date range, quantity, and total. For more information, please review the Dashboards and Dashlets documentation.



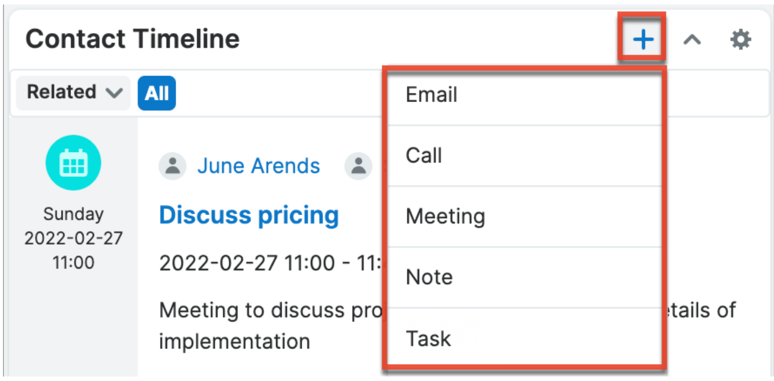
Active Subscriptions Dashlet

By default, the bottom right of the Contact and Account tabs contain the Active Subscriptions dashlet which shows a list of all of the current account's purchases that are marked "Service", have a start date in the past, and an end date in the future. The dashlet shows each purchase's name, quantity of units, and calculated revenue line item amount next to "Total". A simple bar chart visualizes the time elapsed and time remaining for the subscription, which you can explicitly view by hovering your mouse over the bar. For more information, please review the Dashboards and Dashlets section of the User Interface documentation.



Timeline Dashlet

By default, the Contact, Account, Lead, and Case tabs all contain a Timeline dashlet. This dashlet displays the current record's related activities (e.g., calls, meetings) and select field updates (e.g., Assigned To) in the form of record cards. Each card in the dashlet displays key information (e.g., subject, description, guest's name) for the related record, and the cards are sorted in chronological order based on the date they occur or are due (for tasks), with the most recent at the top. You can also quickly create new activities by clicking the Plus (+) icon in the dashlet header. Selecting a type of record will open a Create drawer and automatically select the current record in the new record's Related To field. For more information on Timeline dashlet, refer to the Dashboards and Dashlets documentation.

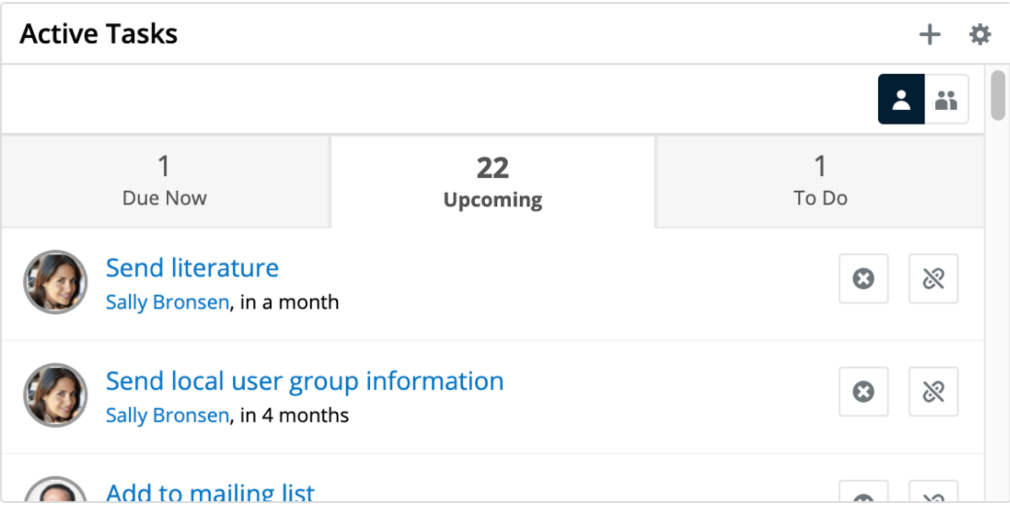


Active Tasks Dashlet

By default, the Lead tab contains an Active Tasks dashlet. The Active Tasks dashlet allows users to view open tasks that require attention and need to be completed on a future or current date. Open tasks have a status of "Not Started", "In Progress", or "Pending Input". The dashlet is broken up into three tabs: "Due Now", "Upcoming", and "To Do", and displays a number on each tab to indicate the count of open tasks falling into each due-date range.

- **Due Now**: Open tasks that are due today and open tasks where the due date is in the past
- **Upcoming**: Open tasks that have a due date in the future
- **To Do**: Open tasks that have no due date specified

When in SugarLive, it will only show the active tasks that have a relationship with the current record. You can close tasks as completed directly from the dashlet by clicking the Completed button to the right of the task's row. In addition, you can delete the task's relationship with the record by clicking the Unlink button to the right of the Completed button. For more information, refer to the Active Tasks dashlet documentation.



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Targets

Overview

Sugar's Targets module consists of individual people who are unqualified prospects that you have some information on but who are not yet qualified leads. Information (e.g., name, email address) regarding these targets are normally acquired from business cards you receive while attending various trades shows, conferences, etc. Targets in Sugar are stand-alone records as they are not related to contacts, leads, accounts, or opportunities. Once the target is qualified according to your organization's practices, it can be converted into a lead record.

This documentation will cover information and actions specific to the Targets module. For instructions concerning views and actions that are common across most Sugar modules, such as creating, editing, and deleting targets, please refer to the Working With Sugar Modules section of this page.

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.

Note: The Targets module is not available for Sugar Serve users. For more information on license types and the functionality available for each, refer to the User Management documentation.

Target Fields

The Targets module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role 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. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer.
Birthdate	The target's date of birth.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
D&B Principal ID	Unique ID number associated to the individual in D&B.
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.
Facebook Account	The target's Facebook account information.
Fax	The target's fax number.
First Name	The target's first name.
Google Plus ID	The target's Google Plus ID.
Home	The target's residence number. If an admin has turned on the Enable Click-to-Call setting in Admin > System

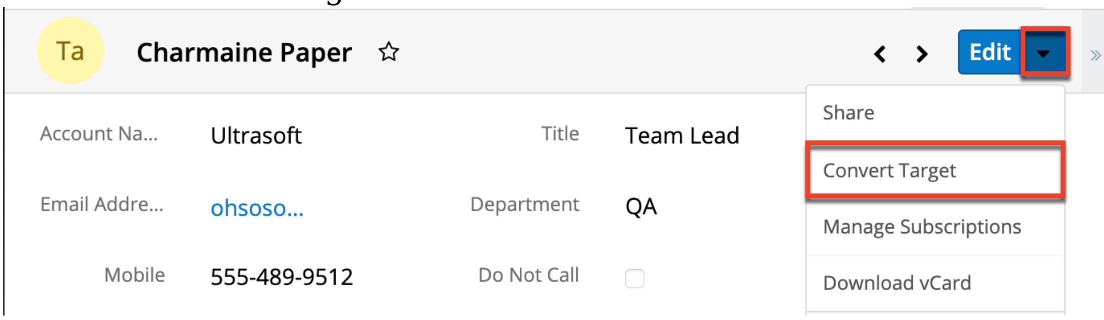
	Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
Last Name	The target's last name.
Mobile	The target's mobile number. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer.
Name	When viewing, the target's full name.
Office Phone	The target's office number. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer.
Other Phone	The target's alternate phone number. If an admin has turned on the Enable Click-to-Call setting in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer.
Primary Address	The target's primary address.
Salutation	Standard greeting for the target (e.g., Mr., Ms., Mrs., etc.).
Tags	User-created keywords that can be used to identify records in filters, dashlets,

	and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the target record.
Title	The target's business title.
Twitter Account	The target's Twitter account information.

Converting Targets to Leads

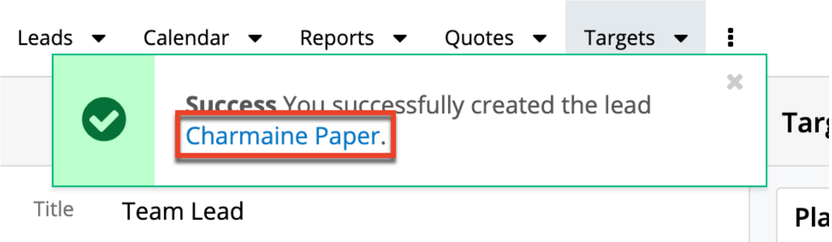
Sugar enables you to convert targets to leads as you determine they qualify for your organization's definition of a lead (e.g., after an evaluation/qualification process) and becomes a valid sales prospect. Please note that targets are only converted into leads in Sugar, and the new lead record will 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.

Use the following steps to convert a qualified target to a lead:

1. Navigate to a target's record view.
2. Select "Convert Target" from the Actions menu.


3. Enter appropriate values for the fields in the Leads record view layout then click "Save".
    - Since targets only convert to a lead, the Leads record view displays all lead fields that 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 record view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration Guide.

4. Once the conversion is complete, the target record will display the converted lead name at the top of the record view page. You can click the record's name to view the detail of the converted lead.



Emails and Targets

Targets include an email address that can be used to email the target as a recipient. The methods for doing so are covered in the Emailing Records section of the User Interface documentation. Targets may also be recipients of campaigns that allow you to send email messages to a large group of recipients as well as to track the results of that message. Please refer to the Campaigns and Targets section of this page for more information. In addition to being a recipient or sender of an email, targets may be related to emails by being selected in the email's Related To field. These relationships allow the target to display all relevant email correspondence in the Emails subpanel and History dashlet on a target's record view.

Emails Subpanel

The Emails subpanel under the Targets record displays emails that are related to the target record in a variety of ways:

- **Explicitly related to the target**: If the target is selected in the email's Related To field, the email and target are explicitly related, and the email will appear in the target's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the Emails documentation.
- **Implicitly related to the target**: If one of the target's email addresses appears in the email's From, To, or Cc fields, the email and target are implicitly related, and the email will appear in the target's Emails subpanel and History dashlet. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email targets or email archiving.

For more information on working with records in subpanels, refer to the User Interface documentation.

Campaigns and Targets

Sugar's Campaigns module can be used to send mass emails or a series of newsletter emails to Sugar accounts, contacts, leads, and targets. The results of each campaign are recorded to measure its impact. Targets are not related directly to campaigns. Rather, each campaign is related to several target list records, and each target list is related to targets and other recipients. To send a campaign email to a target, the target should belong to a default-type target list related to the campaign. To prevent a target from receiving emails from a campaign, the target should belong to the campaign's suppression list-type target list. Once a campaign is sent, the results specific to a particular target will appear in the Campaign Log Subpanel on the target's record view as described in the Campaign Log Subpanel section of this page.

Targets can be added to target lists via the target list record itself, from the Targets list view using the Add To Target List option, or from the Targets record view using the Manage Subscriptions option. Instructions for using the Add To Target List and Manage Subscriptions options in the Targets module are provided in the sections below. For instructions on other available methods of adding to target lists, please refer to the Target Lists documentation.

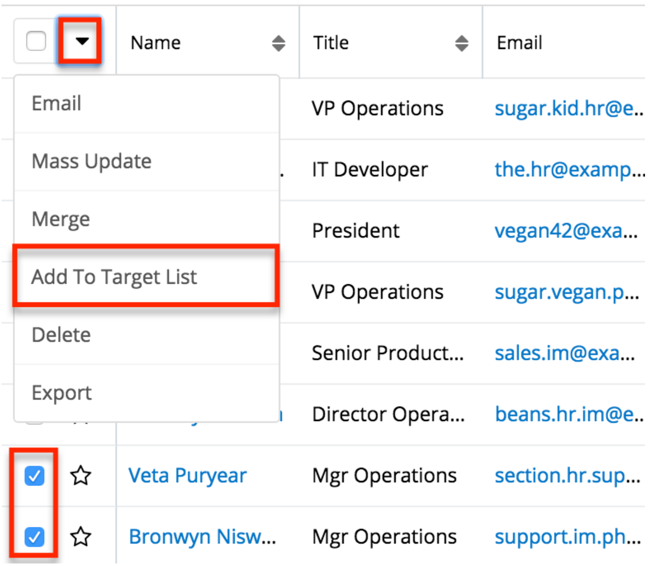
Adding to a Target List via Targets List View

A target list consists of a group of individuals or organizations to be included or excluded from 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 Mass Actions Menu. For more information on target lists and other methods of adding target, please refer to the Target Lists documentation.

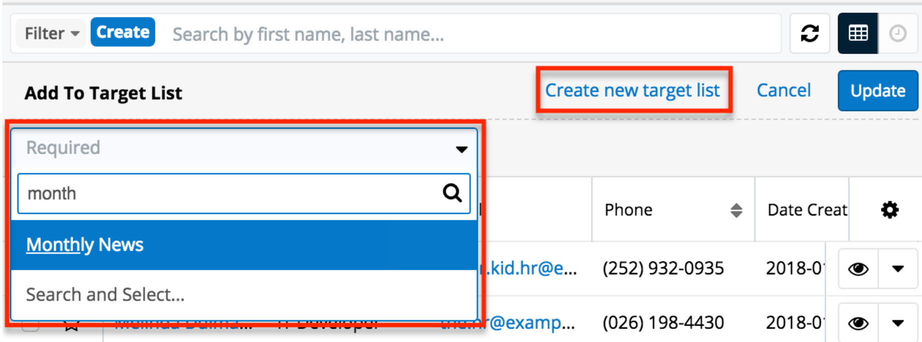
You can use the Select All feature in the list view when adding to a target list, which will allow you to easily select the first 1000 records in the result set. To add more than 1000 records or add a specific group of records to the target list, please use the filter option in list view search to perform the additions in smaller batches.

Use the following steps to add targets to a target list via the Targets list view:

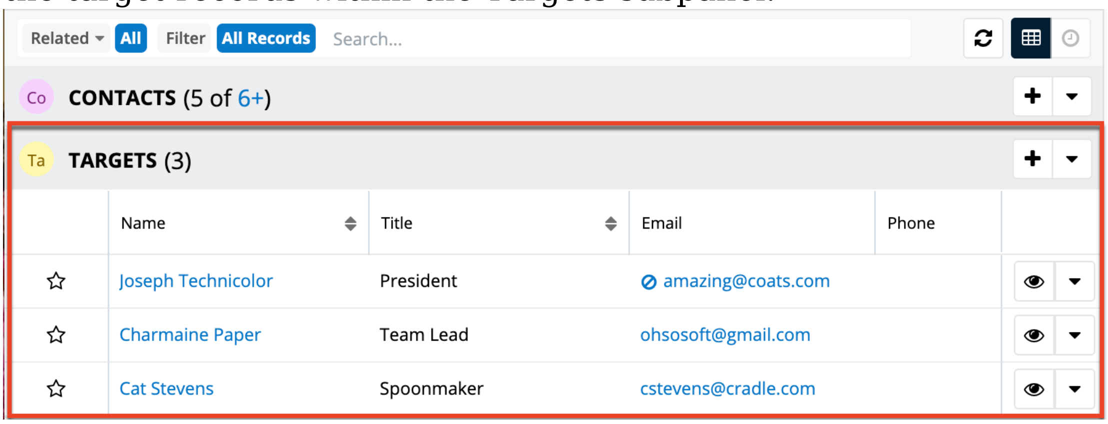
1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the List View Search to find the Target records to add to a target list.
3. Select the desired target records then choose "Add to Target List" from the Mass Actions menu.



4. Below the search bar, locate and select the desired target list in the dropdown list or click "Create new target list" to add the targets to a new target list. Click "Update" to add the record(s) to the 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 open the record view, and you will see the target records within the Targets subpanel.

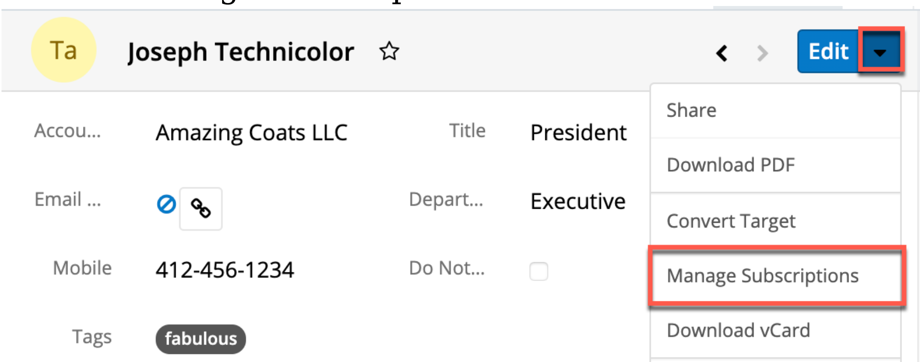


For more information on working with records in subpanels, refer to the [User Interface](#) documentation.

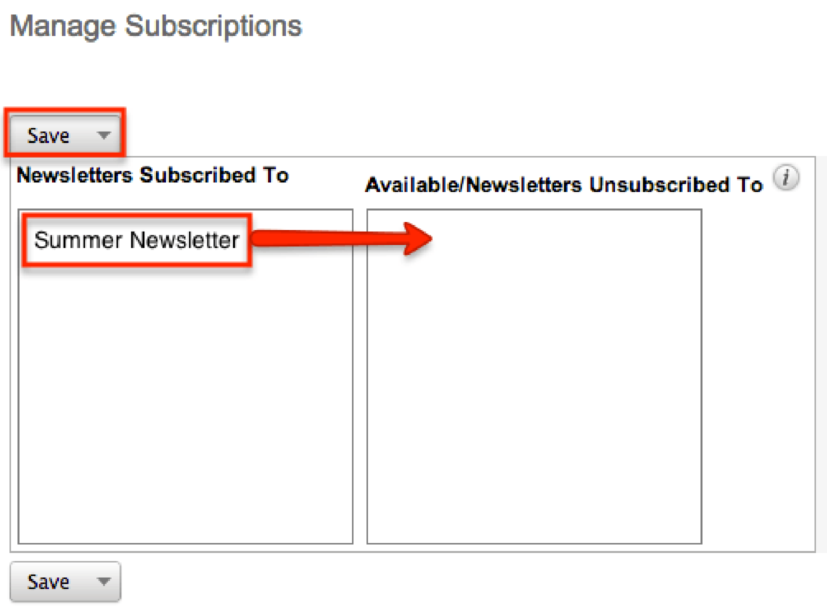
Managing Target Subscriptions

Targets who receive newsletter-type campaign emails from your Sugar instance are considered subscribers to that newsletter. Users can manage these newsletter subscriptions from a target's record 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 record view:

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


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.

Campaign Log Subpanel

The Campaign Log subpanel contains historical information regarding a target'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 Campaign Log subpanel on the target's record view. 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 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 to a Target List via Targets List View section of this page. For more information on campaigns, please refer to the Campaigns documentation.

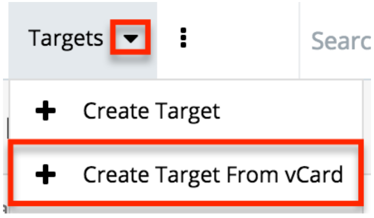
For more information on working with records in subpanels, refer to the User Interface documentation.

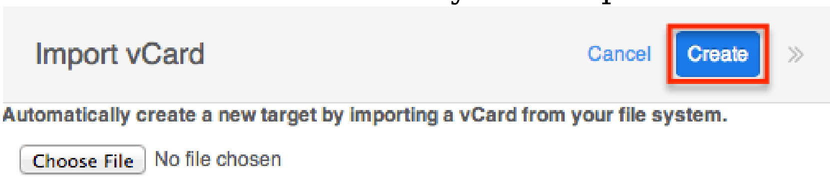
vCards and Targets

vCards are electronic business cards that are exchanged between applications such as email and web browsers. Targets may be created from vCards generated by another application or saved as vCards for use in other software.

Creating Targets via vCard

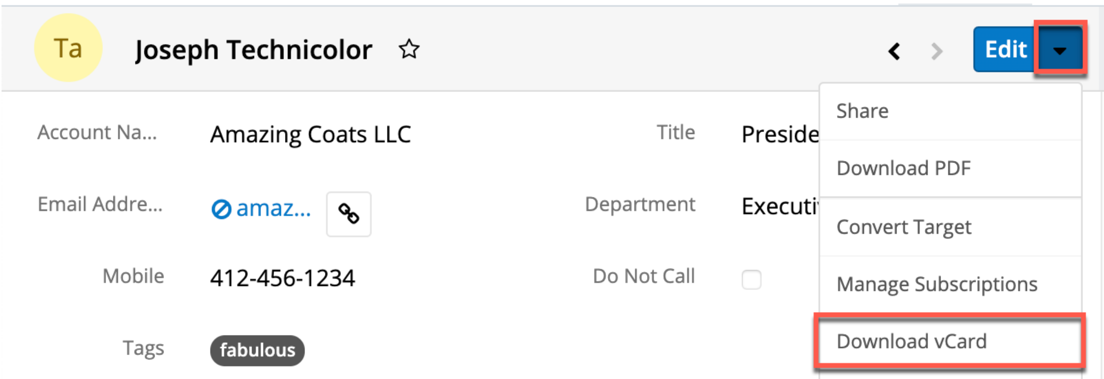
Use the following steps to create a target in Sugar via vCard:

1. Click the triangle in the Targets module and select "Create Target From vCard".


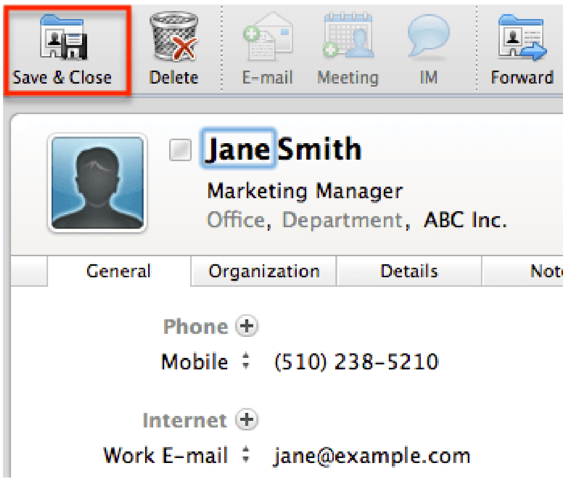
2. Choose the vCard file from your computer and click "Create".


Downloading a Target's vCard

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

1. Navigate to a Targets record view.
2. Select "Download vCard" from the Actions menu 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.



Working With Sugar Modules

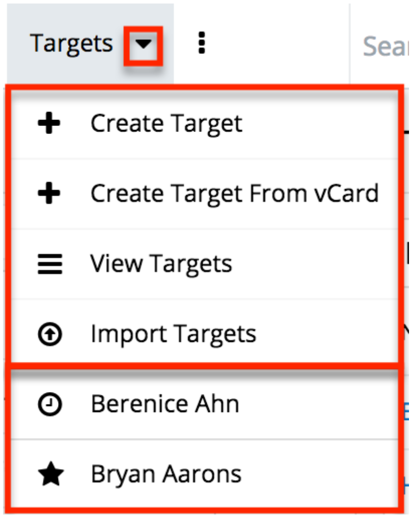
The Targets module uses Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Target Menus

The Targets module contains various options and functionality that are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with a link to more information about the menu option either in the User Interface documentation or, for Targets-specific functionality, within this page.

Module Tab Menus

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 click the triangle in the Targets tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important operations within the module. The Recently Viewed menu displays the list of targets you most recently viewed. The Favorites Menu displays the list of targets you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Target	Opens the record view layout to create a new target.
Create Target From vCard	Opens the record view layout and populates fields from a vCard.
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.

For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

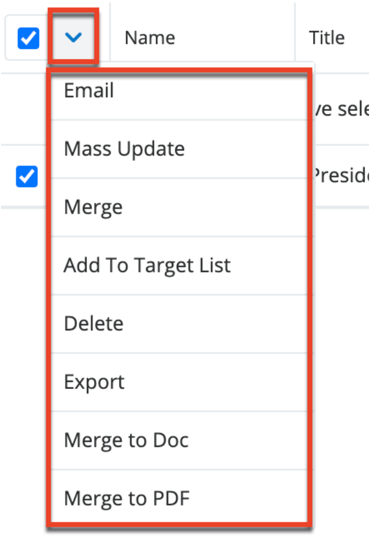
List View Menus

The Targets list view displays all target records and allows for searching and filtering to locate specific targets. You can view the basic details of each record within the field columns of the list view or click a target's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use

the checkbox on each record's row to select individual target records or click the checkbox in the list header to select all records displayed in the current set of list view results.



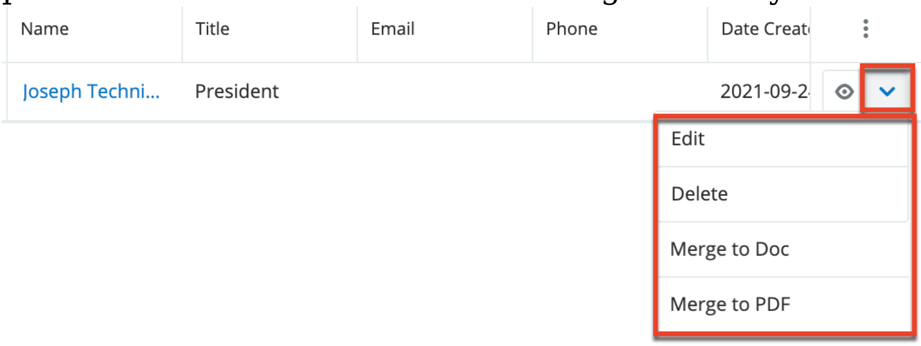
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Email	Email one or more targets at a time.
Mass Update	Mass update one or more targets at a time.
Merge	Merge two or more duplicate targets.
Add to Target List	Add one or more targets to a target list.
Delete	Delete one or more targets at a time.
Export	Export one or more targets to a CSV file.
Recalculate Values	Visible only if the module contains fields using Sugar Logic and only to System Administrators or users with Developer-level role access, this option will refresh the selected records' calculated values.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the

	Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual target directly from the list view.

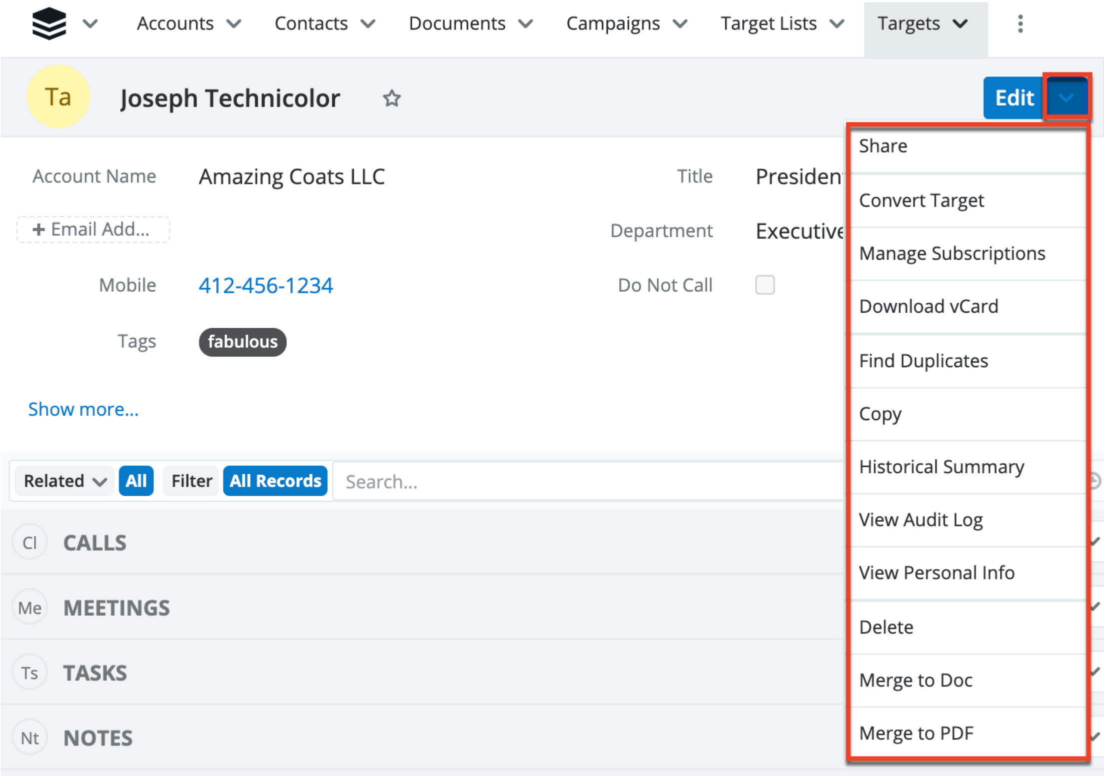


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this target in the intelligence pane.
Edit	Edit this target.
Delete	Delete this target.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Targets record view displays a single target's fields and subpanels of related records. To access a target's record view, simply click a hyperlinked target name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	**Description**
Edit	Edit this target record.
Share	Share a link to this target record via email.
Download PDF	Download the target information as a PDF file. • This menu option is only visible if the administrator has created a PDF template for the Targets module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.
Email PDF	Email the target information as a PDF attachment.

	- This menu option is only visible if the administrator has created a PDF template for the Targets module via Admin > PDF Manager. - Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Convert Target	Convert this target to a lead.
Manage Subscriptions	Manage this target's newsletter campaign subscriptions.
Download vCard	Download a vCard from Sugar and transfer this target's information to another application (e.g., Outlook).
Find Duplicates	Locate potential duplicates of this target record.
Copy	Duplicate this target's information to create a new target record.
Historical Summary	View a historical summary of activities (e.g., calls, meetings, etc.) related to this target.
View Audit Log	View a record of changes to this target.
View Personal Info	Display this record's fields that an admin has designated as personal information.
Delete	Delete this target record.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules.

Content Link	Description
Creating Targets Basic Target Creation Creating via Quick Create Creating via Subpanels Creating via Duplication Importing Targets	The Creating Records section covers the various methods of creating new target records, including via the Create button in the Targets module, the Quick Create menu on the upper right of every Sugar page, via the Targets subpanel on related module records, via duplication of an existing target record, and importing a list of targets into Sugar using a .csv spreadsheet.
Viewing Targets Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Preview Viewing via Reports	The Viewing Records section describes the various methods of viewing target records, including via the Targets list view and record view, the Recently Viewed menu in the Targets module tab, previewing targets in the right hand side panel, and reports displaying target data.
Searching for Targets Global Search List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to the two searching methods for locating targets: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Targets module.
Targets List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview	The List View section walks through the many elements of the Targets List View layout, which contains a filterable list of all target records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Targets list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.

Record Actions Menu More Targets Dashboards	
Targets Record View Favorite Designation Next or Previous Record Actions Menu Show More Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Dashboards	The Record View section walks through the many elements of the Targets Record View layout, which contains detailed information about a single target record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Targets record view are described in the Record View Actions Menu section of this page.
Editing Targets Editing Inline via Record View Editing via Record View Editing Inline via Subpanels Editing Inline via List View Mass Editing via List View	The Editing Records section describes the various methods of editing existing target records, including inline via the Targets record view, in full edit mode on the record view, inline via the Targets subpanel on related module records, inline via the Targets list view, and via the Mass Update option on the list view.
Deleting Targets Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted targets, including via the Targets record view, an individual record's Actions menu on the Targets list view, and the Mass Actions menu on the list view.
Emailing Targets Emailing via Email Address Fields Emailing via List View Emailing via Quick Create Emailing via Emails Module Emailing via Workflows	The Emailing Records section describes the various methods of emailing target records as recipients, including clicking any email address within Sugar, via the Mass Actions menu on the Targets list view, via the Quick Create menu, via the Emails module using the Related To field, and via workflows that can automatically send emails according to conditions configured by administrator users.
Exporting Targets	The Exporting Records section provides an introduction to the export functionality, which allows you to download a list of targets and all their

	data as a .csv file for use outside of Sugar (e.g., in Microsoft Excel).
Recalculating Calculated Values	The Recalculating Calculated Values section provides instructions on utilizing the Recalculate Values list view option to update calculated field values in the module if the administrator has changed the field's formula via Admin > Studio.
Finding Duplicate Targets	The Finding Duplicate Records section provides instructions for locating duplicate target records. If searching on matching fields (e.g., Last Name) identifies one or more duplicates, they can be merged into a single record.
Merging Targets Merging via List View	The Merging Records section provides instructions for merging duplicate targets, which will combine field values and related records into a single target.
Viewing Target Historical Summaries	The Viewing Record Historical Summaries section describes the Historical Summary record view option, which displays quick details of the target record's related calls, meetings, emails, notes, and tasks.
Viewing Target Audit Logs	The Viewing Record Audit Logs section describes the View Audit Log record view option, which displays a history of changes to the target's audited fields.
Target PDFs Downloading Target PDFs Emailing Target PDFs	The Record PDFs section provides instructions for these record view options, which allow you to download or email .pdf files of target information as configured by an administrator via Admin > PDF Manager.
Favoriting Targets Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking targets as favorites, including via the Targets list view, Targets record view, or any Targets subpanel appearing on the record view of a related module. Favoriting a target allows you to easily access it from list views, dashlets, or the Targets module tab.

Sharing Targets	The Sharing Records section provides instructions for the Share record view option that composes an email with a link to the target record. If the recipient is logged into Sugar, clicking the link will bring them directly to the target's record view.

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Target Lists

Overview

Target lists are used by Sugar's Campaigns module as collections of individuals or organizations you want to include or exclude in a campaign. Each campaign may relate to several target lists, and each target list can relate to any number and combination of targets, contacts, leads, users, and accounts. In turn, each of these records can be a part of multiple target lists, each of which may represent a grouping of recipients based on relevant criteria such as age group, geographical location, or industry.

This documentation will cover information and actions specific to the Target Lists module.

- For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting target lists, please refer to the Working With Sugar Modules section of this page.
- For instructions on how to send an email campaign to a target list, please refer to the Campaigns documentation as well as the Creating a Campaign and other campaign-related articles in our Knowledge Base.

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 documentation in the Administration Guide.

Note: The Target Lists module is not available for Sugar Serve users. For more information on license types and the functionality available for each type, refer to the User Management documentation.

Target Lists Fields

The Target Lists module contains a number of stock fields, which come out-of-the-box with Sugar. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. For information on using and editing various field types, refer to the User Interface documentation.

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.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the target list.
Total Entries	The total count of records (contacts, leads, targets, users, and accounts) belonging to a target list. This number will update automatically and cannot be edited manually. **Note**: You must refresh the record view page to update the Total Entries field after adding records 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 depending on 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.

For more information on sending campaigns, please refer to the Campaigns documentation.

Populating Target Lists

A target list consists of a group of individuals or organizations (e.g., targets, contacts, accounts, etc.) you wish to be included or excluded from 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 populate a target list in Sugar including using the Add to Target List option from a module's list view, selecting records from the subpanel in the Target Lists record view, etc. You can use the Select All feature in the module's list view when adding to a target list, which will allow you to easily select the first 1000 records in the result set. If you wish to add more than 1000 records or add a specific group of records to the target list, please use the filter option in the list view search to perform the additions in smaller batches.

Please note that 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 which are considered duplicates will be suppressed even though they are not on the opt-out list.

For more information on sending campaigns, please refer to the Campaigns documentation.

Populating via Individual Selection

The record view of each target list will display the Targets, Contacts, Leads, Users, and Accounts subpanels. Users have the option to select and add the desired targets directly via these subpanels.

The following steps cover populating a target list with contacts via the Target Lists record view as an example:

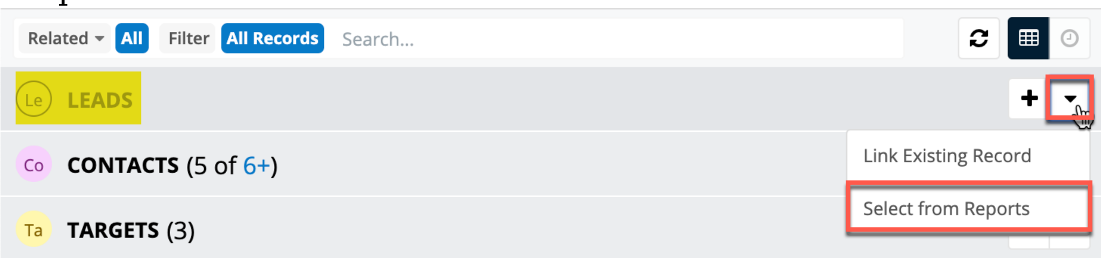
1. Navigate to a target list's record view.
2. Scroll to the Contacts subpanel and choose "Link Existing Record" from the subpanel's Action menu.
3. Locate and select the desired record from the Search and Select Contacts page.

Once the contacts have been selected, you will see the records within the Contacts subpanel of your target list's record view.

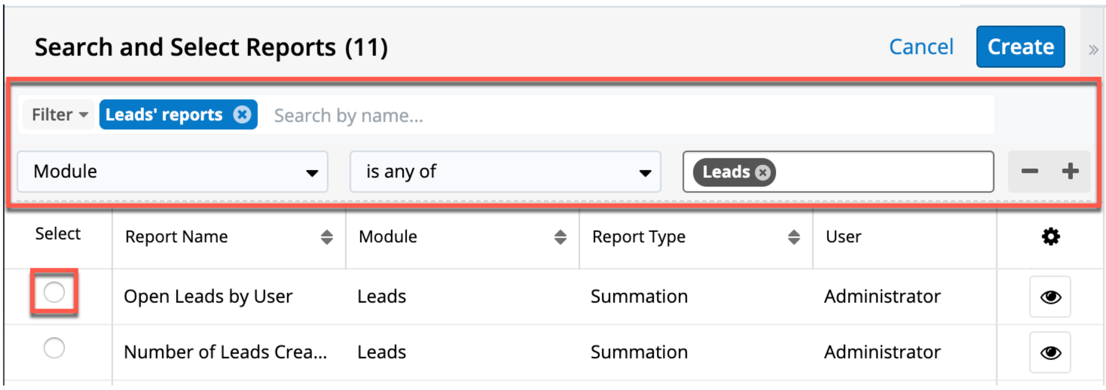
Populating via Reports

The record 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.

The following steps cover populating a target list by selecting a report based on the Leads module as an example:

1. Navigate to a target list's record view.
2. Scroll to the Leads subpanel and choose "Select from Reports" from the subpanel's Action menu.


3. Reports based on the Leads module will display on the Search and Select Reports page. Select the report you wish to add to the target list by clicking the radio button to the left of the report's name.

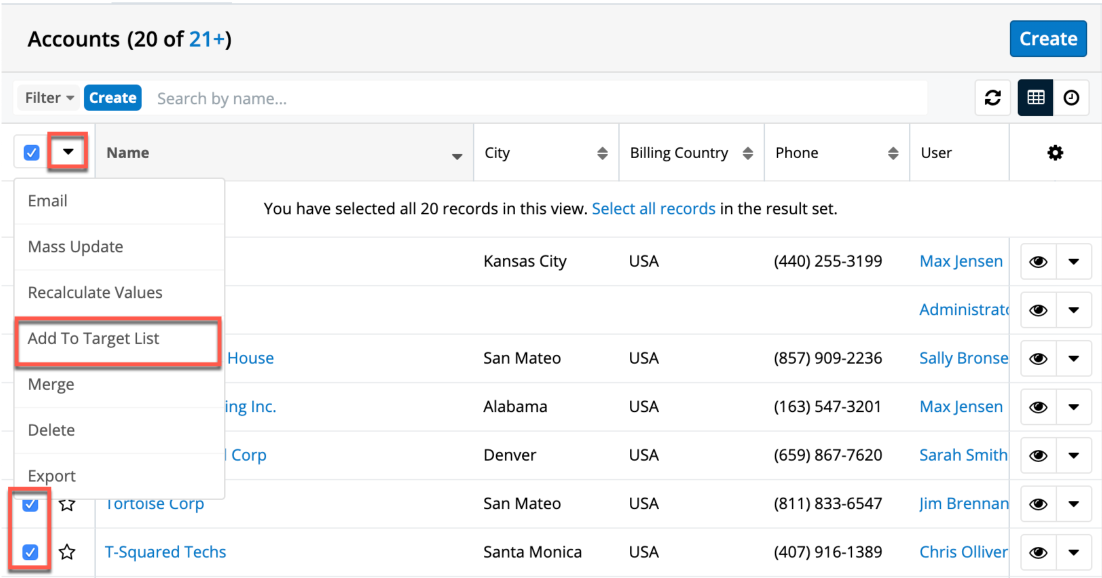


Once the report has been selected, the lead records from the report results will display in the Leads subpanel. To add more records to the target list, simply use the Select from Reports option again and choose a different report.

Populating via Module List View

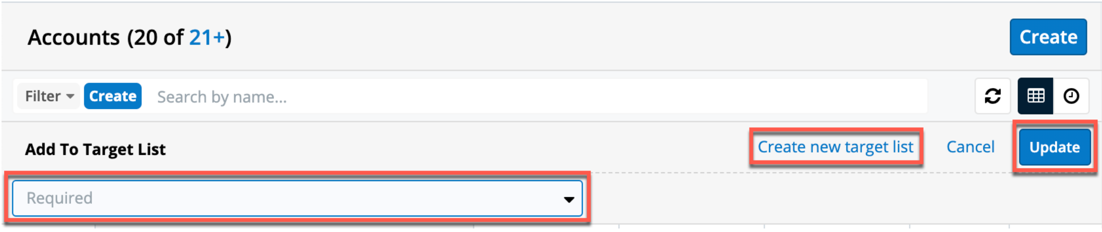
You can select records directly from the Accounts, Contacts, Leads, and Targets list views to add them to a target list.
The following steps cover populating a target list by selecting records from the Accounts list view as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the List View Search to find the Account record(s) you wish to add.
3. Select the desired account record(s) then choose "Add to Target List" from the Actions menu.



4. The Add To Target List panel will appear below the search bar. Search and select the desired target list from the dropdown list or create a new target list by clicking "Create new target list".
   - If creating a new target list, enter appropriate values for the fields

in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.



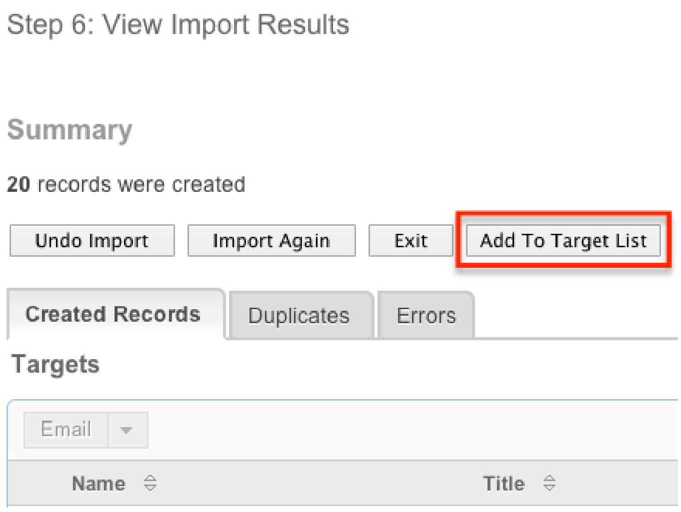
5. Once the appropriate target list is selected or created, click "Update" to add the account records to the target list.

The selected account records will appear in the Accounts subpanel of the target list record.

Populating via Importing Targets

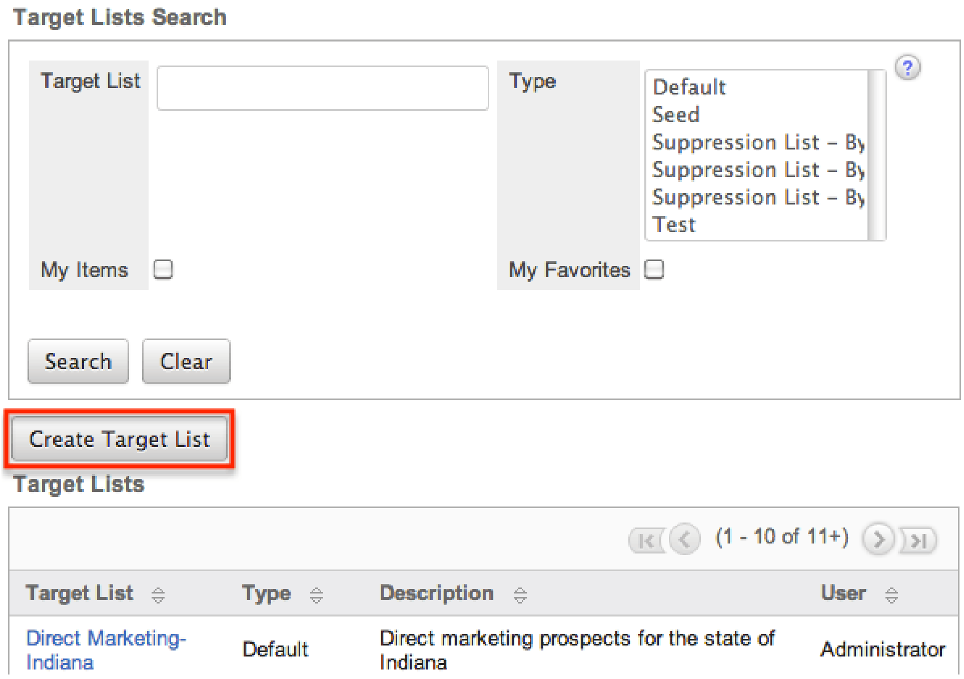
The Target Lists module does not have an import option, but you can import targets via the Targets module. While performing the import, users have the option to add the targets to a target list. For more information on how to import records into Sugar, please refer to the Import documentation.
Use the following steps to populate a new or existing target list with newly imported targets:

1. Click the triangle in 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. On Step 6 of the import process, click the Add to Target List button.



7. A popup window will open with the option to select an existing target list or create a new target list.

- If adding to an existing target list, search and select the desired target list from the window.
- If creating a new target list, enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.

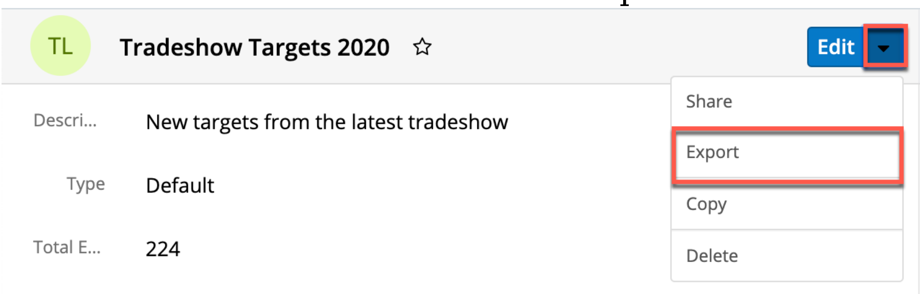


Once the appropriate target list is selected or created, the newly imported targets will appear in the Targets subpanel of the target list record.

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 Target Lists record view. 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 record view:

1. Navigate to a target list's record view.
2. Click the Actions menu and select "Export".



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 you do not see the Export option.

Working With Sugar Modules

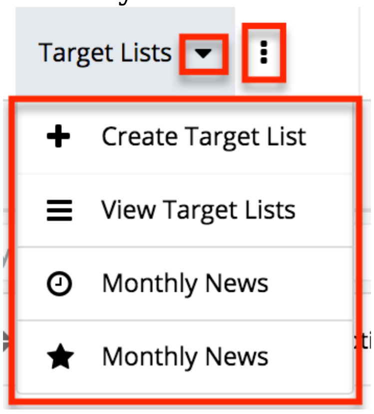
The Target Lists module uses Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Target Lists Menus

The Target Lists module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Target Lists-specific functionality, within this page.

Module Tab Menus

The Target Lists module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Target Lists" to access the list view. Once the Target Lists tab is visible in the navigation bar, you can click the triangle within 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 target lists you most recently viewed. The Favorites menu displays the list of target lists you most recently marked as favorites.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Target List	Opens the record view layout to create a new target list.
View Target Lists	Opens the list view layout to search and display target lists.

For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

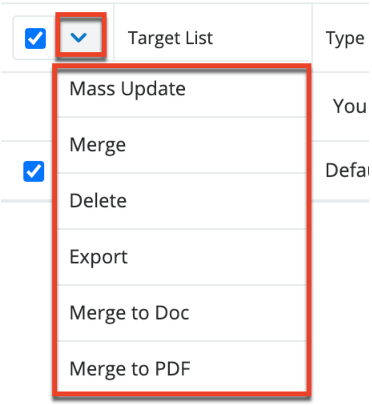
List View Menus

The Target Lists list view displays all call records and allows for searching and filtering to locate specific target lists. You can view the basic details of each record within the field columns of the list view or click a target list's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

Menu Item	Description
Mass Update	Mass update one or more target lists at a time.
Merge	Merge two or more duplicate target lists.
Delete	Delete one or more target lists at a time.
Export	Export one or more target lists to a CSV file.

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual target list records or click the checkbox in the list header to select all records displayed in the current set of list view results.

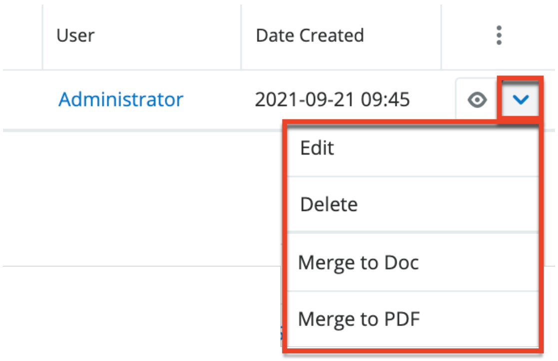


The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more target lists at a time.
Merge	Merge two or more duplicate target lists.
Delete	Delete one or more target lists at a time.
Export	Export one or more target lists to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual target list directly from the list view.

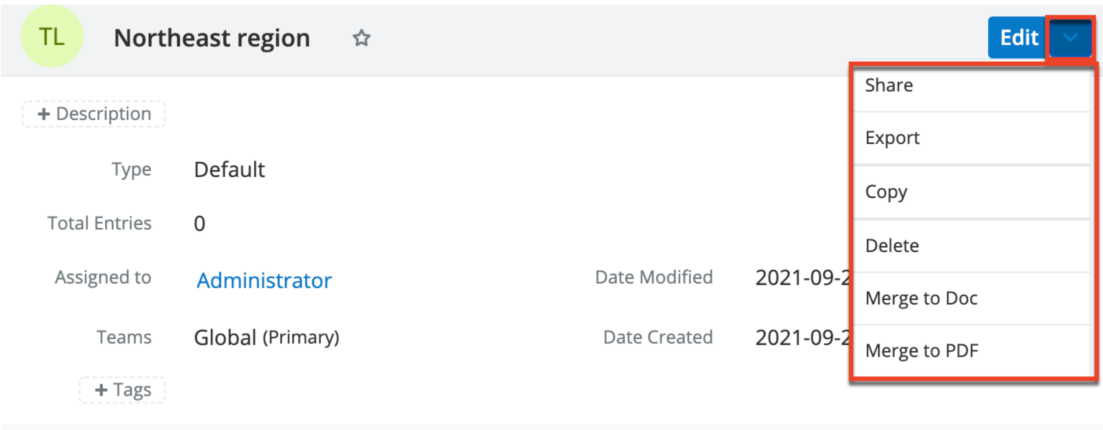


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this target list in the intelligence pane.
Edit	Edit this target list.
Delete	Delete this target list.
Export	Export one or more target lists to a CSV file.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Target Lists record view displays a single target list in full detail including its fields and subpanels of related records. To access a target list's record view, simply click a hyperlinked target list name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this target list.
Share	Share a link to this target list via email.
Export	Export the members (i.e., contacts, leads, targets, users, and accounts) of this target list to a .csv file.
Copy	Duplicate this target list to create a new target list.
Delete	Delete this target list.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules.

Content Link	Description
Creating Target Lists Basic Target List Creation	The Creating Records section covers the various methods of creating new target

Creating via Subpanels Creating via Duplication	list records, including via the Create button in the Target Lists module, via the Target Lists subpanel on campaigns, and via duplication of an existing target list record.
Viewing Target Lists Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Preview	The Viewing Records section describes the various methods of viewing target list records, including via the Target Lists list view and record view, the Recently Viewed menu in the Target Lists module tab, and previewing target lists in the right-hand side panel.
Searching for Target Lists Global Search List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to the two searching methods for locating target lists: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Target Lists module.
Target Lists List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview Record Actions Menu More Target Lists Dashboards	The List View section walks through the many elements of the Target Lists List View layout which contains a filterable list of all target list records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Target Lists list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.
Target Lists Record View Favorite Designation Next or Previous Record Actions Menu Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Dashboards	The Record View section walks through the many elements of the Target Lists Record View layout which contain detailed information about a single target list record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Target Lists record view are described in the Record View Actions Menu

	section of this page. **Note**: In the Users subpanel on a target list record view, regular users can link or unlink any active user record but can only inline edit their own user record. Administrators can inline edit, link, and unlink any active user record via the Users subpanel.
Editing Target Lists Editing Inline via Record View Editing via Record View Editing Inline via List View Mass Editing via List View	The Editing Records section describes the various methods of editing existing target list records, including inline via the Target Lists record view, in full edit mode on the record view, inline via the Target Lists list view, and via the Mass Update option on the list view.
Deleting Target Lists Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted target lists, including via the Target Lists record view, an individual record's Actions menu on the Target Lists list view, and the Mass Actions menu on the list view.
Exporting Target Lists	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of target lists and all their data as a .csv file for use outside of Sugar (e.g., in Microsoft Excel).
Merging Target Lists Merging via List View	The Merging Records section provides instructions for merging duplicate target lists which will combine field values and related records into a single target list.
Favoriting Target Lists Favoriting via List View Favoriting via Record View	The Favoriting Records section describes the various methods of marking target lists as favorites, including via the Target Lists list view or Target Lists record view. Favoriting a target list allows you to easily access it from list views, dashlets, or the Target Lists module tab.
Sharing Target Lists	The Sharing Records section provides instructions for the Share record view option which composes an email with a

	link to the target list record. If the recipient is logged into Sugar, clicking the link will bring them directly to the target list's record view.

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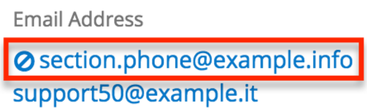
Campaigns

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.

The Campaigns module is not available for Sugar Serve users. For more information on license types and the functionality available for each, refer to the User Management documentation.

Note: Email addresses that are marked as opted-out cannot receive campaign emails. For more information, refer to the Emails documentation.



Campaign Fields

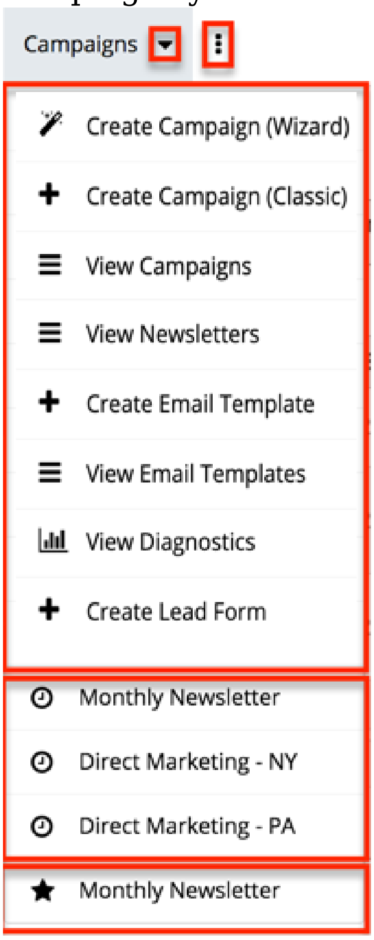
The Campaigns module contains a number of stock fields, which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged to best meet your organization's needs. Users with administrator or developer access have the ability to alter, add, 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 views.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
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 found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Campaigns" to access the list view. Once the Campaigns tab displays on the navigation bar, you can click the triangle within 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 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 in the module.



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 Templates	Opens the Email Templates list view layout to search and display email templates.
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.

For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

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 > System Email Settings. For more information on configuring outbound email, please refer 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 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

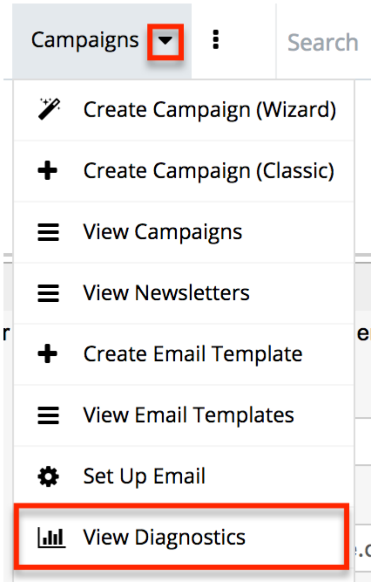
Campaigns Scheduler. The frequency of this scheduler should be determined in conjunction with the campaign batch size to ensure you do not exceed sending limitations imposed by your email provider. For more information on configuring schedulers, please refer to the Schedulers documentation in the Administration 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.

Campaign Diagnostic Tool

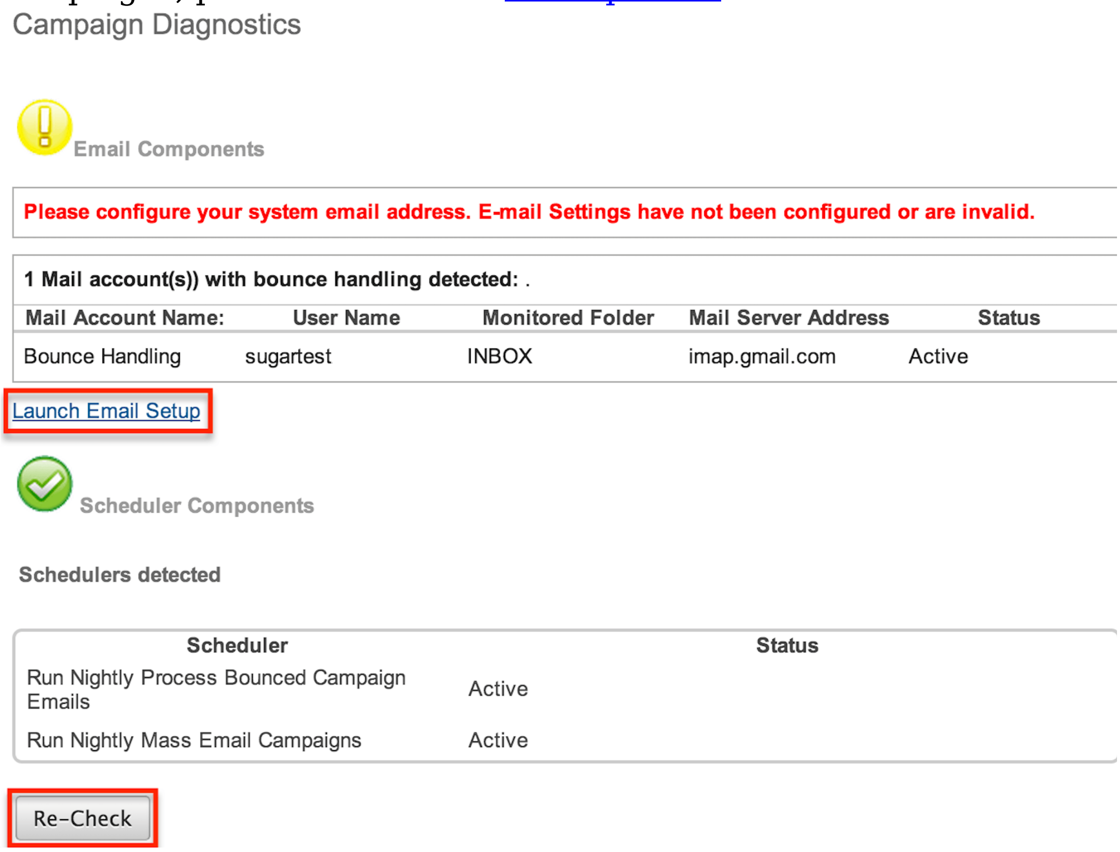
The campaign diagnostic tool enables you to check if all pending administrative tasks have been completed before you attempt to launch the campaign. It is recommended that the Campaign Diagnostic tool be run prior to sending out campaigns to ensure any issues get resolved before the campaign emails need to be sent.

Use the following steps to run the campaign diagnostic tool:

1. Click the Actions menu in the Campaigns module tab and select "View Diagnostics".



2. Sugar will check your instance's email and scheduler configuration and display warnings if any additional configuration is necessary. Administrator users will also see links (e.g., Launch Email Setup) to appropriate sections of the Administration page to correct the issues.
    - **Note**: If you are not an administrator user, please reach out to your system administrator to have the issues looked into and resolved accordingly. For more information on the required elements for campaigns, please refer to the Prerequisites section above.



3. Once all necessary configurations have been completed, click the Re-Check button 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:

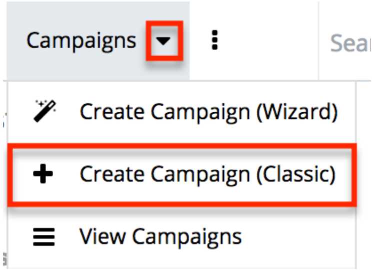
- **Newsletter**: A series of mass emails sent to a consistent or growing target list periodically or on a regular basis. Each newsletter is intended to be managed on a subscription basis and is normally targeted towards individuals with whom you have an existing relationship. The Frequency field is 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.

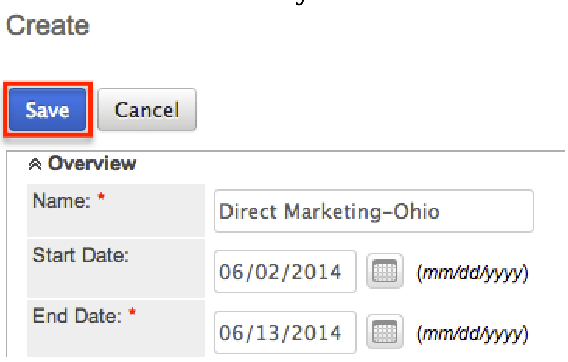
Creating Campaigns

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 add the target list and create tracker URLs as well as an email marketing record via the related subpanels below the campaign's detail. The classic option is recommended for simplicity and empowering users to make modifications to the campaign later. The campaign wizard option will walk you through getting the campaign created step-by-step. Each step of the campaign set-up process will guide users on the items (Tracker URLs, Target List, Marketing, etc.) that need to be completed.

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. Click the Actions menu in the Campaigns module tab and select "Create Campaign (Classic)".


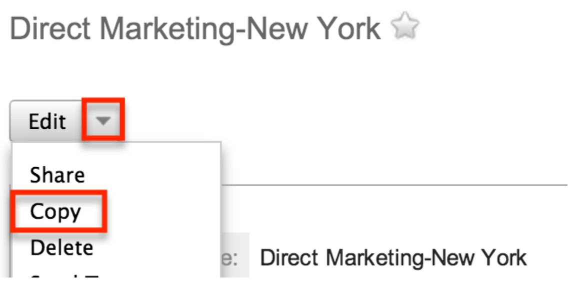
2. Enter appropriate values for the fields in the edit view layout which will help identify the campaign. All required fields are marked with a red asterisk and must be completed prior to saving.
    - **Note**: The status, start date, and end date entered on this screen are for your records only and will not control when the actual email campaign will be executed.
3. Once the necessary information is entered, click "Save".


Once the campaign record is created, scroll to the related subpanels below the campaign's detail to add the target list and create the tracker URLs as well as an email marketing record.

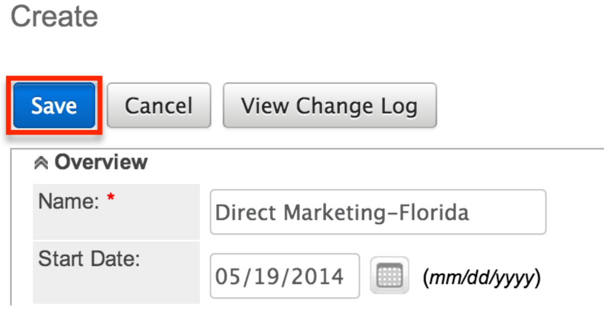
Creating Via Duplication

You can also create a new campaign by duplicating an existing campaign record. The Copy 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. Click the Actions menu and select "Copy".



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, scroll to the related subpanels below the campaign's detail to add the target list and create the tracker URLs as well as an email marketing record.

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 combination of contacts, leads, targets, users, and accounts. You have the option to associate existing target lists with your new campaign or to create new target lists during the campaign creation process.

The target list type determines some specific functionality within the campaign. The available 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.

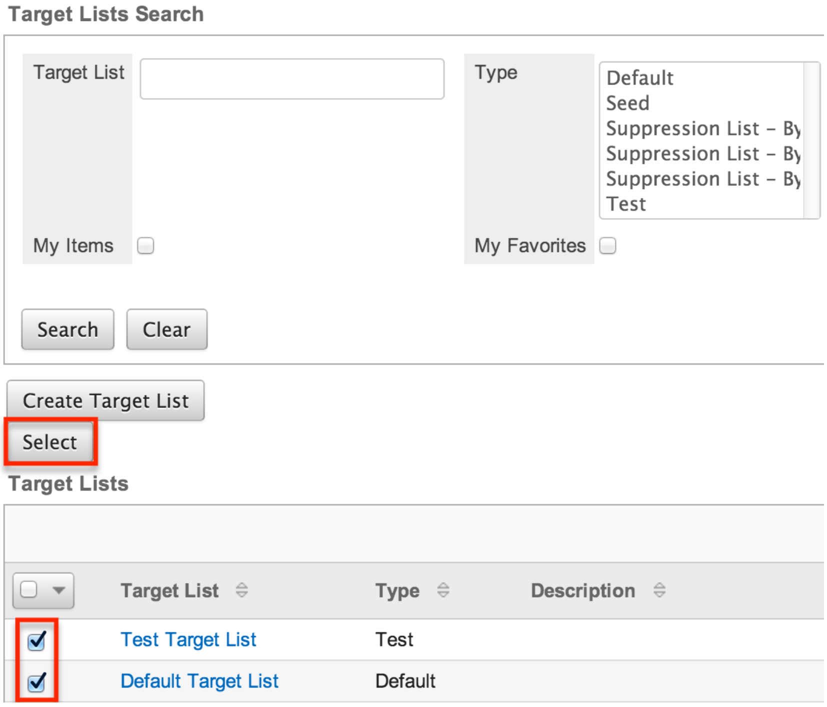
Sugar will also create some target lists for you by default. For example, when selecting a campaign type of "Newsletter", Sugar automatically generates three target lists for the campaign: default-type "Subscription List", suppression by ID-type "Unsubscription List", and test-type "Test List". Please 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 Campaigns detail view:

1. Navigate to the Target List subpanel.
2. Choose "Select" from the Actions menu.
    - **Note**: Click the Create button if you wish to create a new target list for the campaign.

3. Locate and select the name of the desired target list in the pop-up window. To add several target lists at once, mark the specific record's corresponding checkbox then click "Select".



Creating Tracker URLs

Tracker URLs are special links for your email template that you can insert in place of standard links to help you understand how your recipients are engaging with the campaign message. 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 are reportable and visible via the Campaign Status page for your email campaign.

Tracker URLs can redirect recipients to public URLs such as a page on your website, to a Sugar web-to-lead form, or to an opt-out page that suppresses the recipient's email address from future mailings from the current list in Sugar. Once you send a campaign that contains tracker URLs, you can see how many recipients clicked each link and who those recipients are via the Campaign Response Subpanel on the View Status page for the campaign.

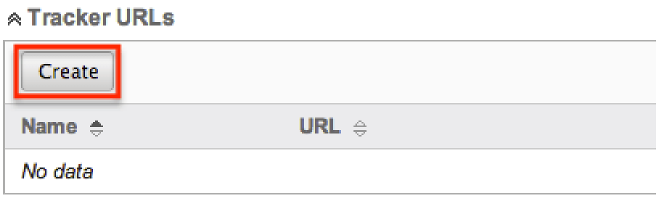
The following sections explain how to create different types of tracker URLs (i.e., redirect and opt-out) and insert them into your email template.

Creating Redirect Tracker URLs

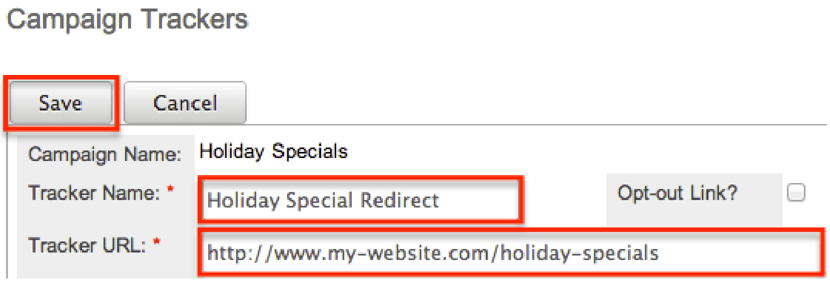
Tracker URLs pass clicks from the email message through your Sugar instance before arriving at their final destination. This allows the clicks to be tracked by your campaign, which provides visibility into how your recipients are responding to the campaign.

Redirect tracker URLs can appear as text or images in your campaign email and, when clicked, will steer your recipient to the URL of your choice: a page on your 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.

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. Enter appropriate values in the fields on the page. 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 "Save" to create 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 Inserting Tracker URLs section of this documentation.

Creating Opt-Out Tracker URLs

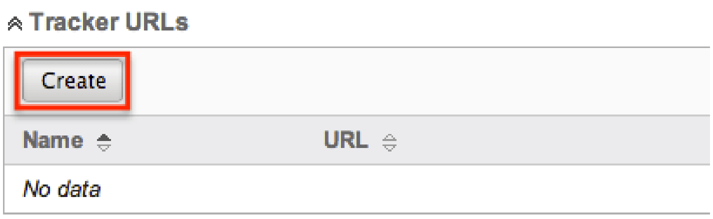
You can create an opt-out tracker URL to embed an Unsubscribe link in the campaign email which will allow the targets to opt-out of your campaign mailing list. Please note that you will need to manually add the opt-out link by inserting the tracker URL in the email template. If an opt-out link is not included in the email template, Sugar will add a default opt-out link to the bottom of your campaign email.

Please note that both the newsletter-type and email-type campaigns include opt-out links, but the behavior of each is different. For more information on how the opt-outs work for each campaign type, please refer to the Understanding Campaign Opt Outs article.

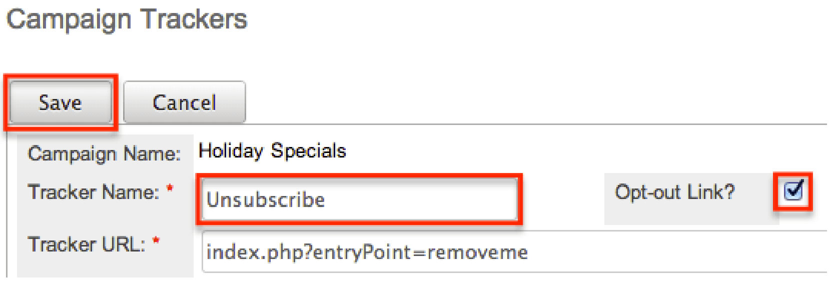
When a recipient clicks the opt-out link in the email, a new browser tab will open to confirm that the recipient has elected to opt-out of receiving campaign emails. Please note that administrators can modify the confirmation message that appears by changing the LBL_ELECTED_TO_OPTOUT label via Admin > Studio > Campaigns > Labels. For more information on modifying labels, please refer to the Studio documentation in the Administration Guide. Any recipients who have elected to opt-out of receiving campaign emails will be listed in the Opted Out subpanel of the Campaign Status page.

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. Enter appropriate values in the fields on the page. 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.



4. Click "Save" to create the opt-out 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 Inserting Tracker URLs section of this documentation.

Creating Email Marketing Records

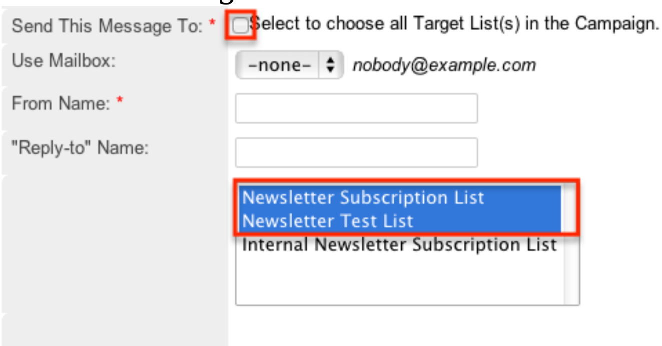
When you create an email campaign, you must also create an Email Marketing record that specifies the body of the message in the form of an email template, which bounce-handling account will catch automated replies from invalid email addresses, and which target lists will receive this particular mass 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, 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.

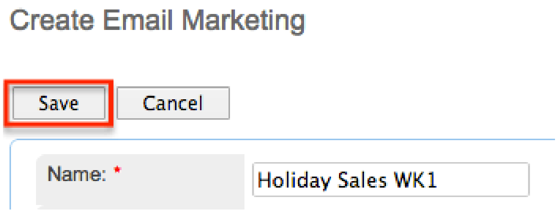
2. Complete the fields as follows. All required fields are marked with a red asterisk and must be completed.
    - **Name**: Enter an internal name for the email marketing record.
    - **Status**: Select "Active" from the dropdown. Only active Email Marketing records may be sent.
    - **Start Date & Time**: Enter a date and time when the emails need to begin sending. 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 a From email address that differs from the address set up in Admin > System 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 field will automatically populate if a Reply-to name is provided on the bounce handling account. You can override the Reply-to name to a different one so that any replies on the email campaign can be addressed to this name on the email.
- **"Reply-to" Address**: This field will automatically populate if a Reply-to address is provided on the bounce handling account. Please note that if any recipients reply back to the email campaign, it will be sent to this email address on the bounce handling account by default. You can override the Reply-to address for the campaign to a different one so that any replies can be sent to a specific email address where it can be better monitored.

3. Click the Save button to complete the creation of the Email Marketing record.

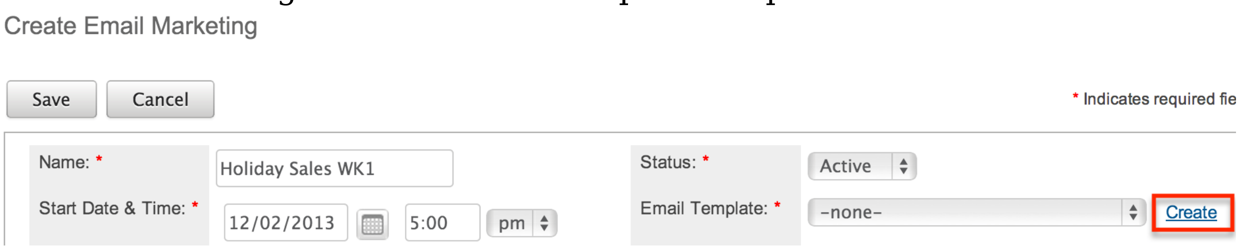


Creating Email Templates

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.

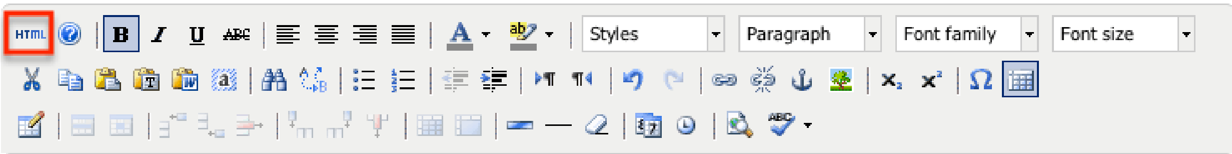
Use the following steps to create an email template from the Email Marketing record:

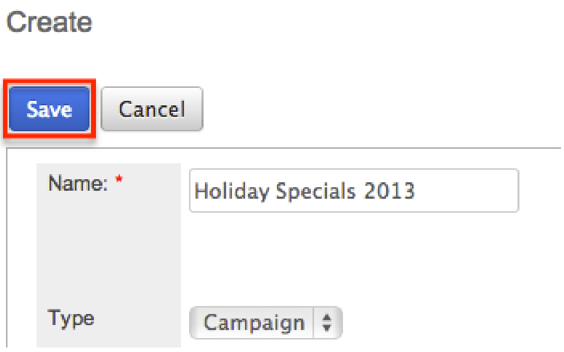
1. While creating or editing your campaign's Email Marketing record, click "Create" to the right of the Email Template dropdown.



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.
- **Insert Variable**: Insert variables or placeholders into the template. For more information regarding inserting variables, please refer to the Inserting Variables section.
- **Insert Tracker URL**: Insert a tracker URL or opt-out link into the template. For more information regarding inserting tracker URLs, please refer to the Inserting Tracker URLs section.
- **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.
   

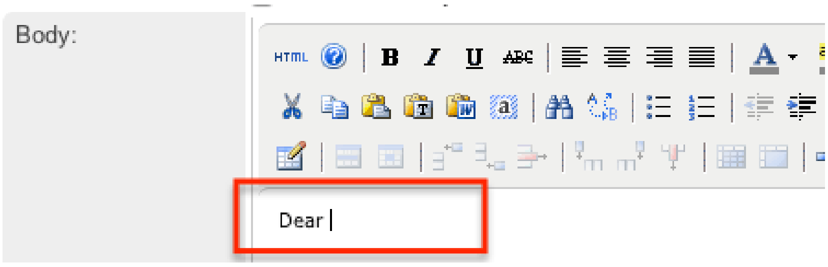
4. Click "Save" to preserve your changes to the email template.
   

Inserting Variables

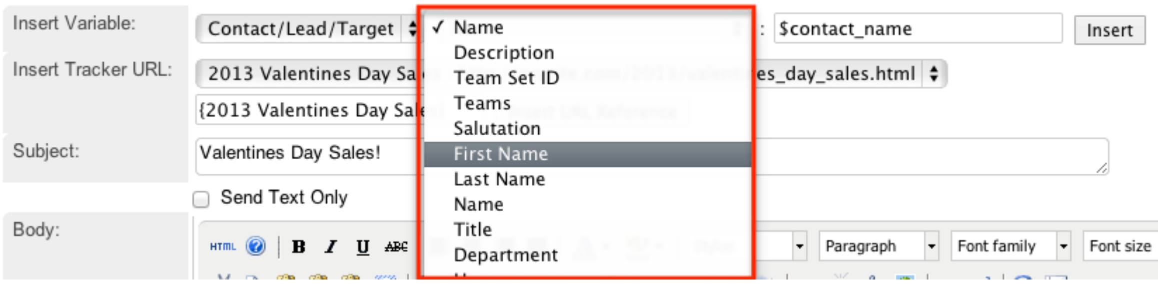
When constructing the subject and body of your email, Sugar allows you to insert variables, or placeholders, into the template that will be populated with the record's information for that variable.

Use the following steps to insert a variable for the recipient's first name into the template:

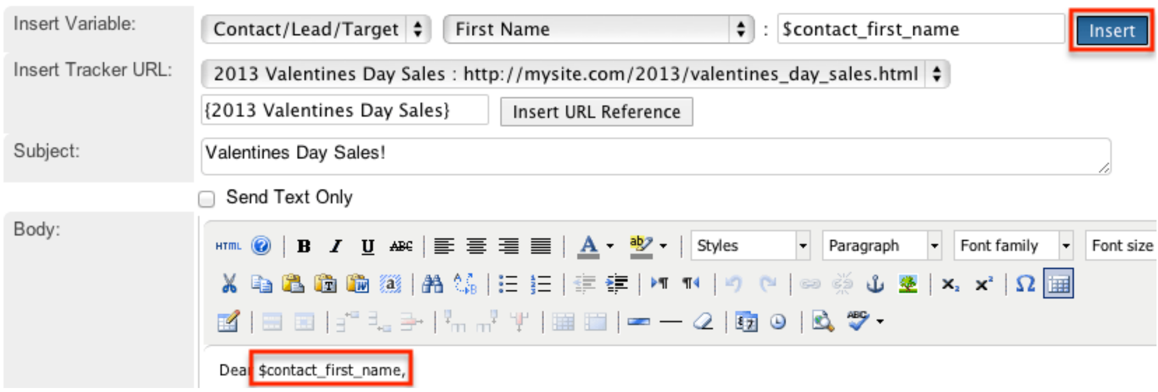
1. Click to place your cursor on the location in the subject or body where the recipient's first name should appear.



2. In the Insert Variable row, the first dropdown defaults to "Contact/Lead/Target" which will allow you to insert fields from the associated person-type recipient's record.
3. Set the second dropdown to the desired field (e.g., First Name) from the modules selected in the first dropdown.



4. Click the Insert button to insert the generated variable name to your subject or body at your cursor's location.

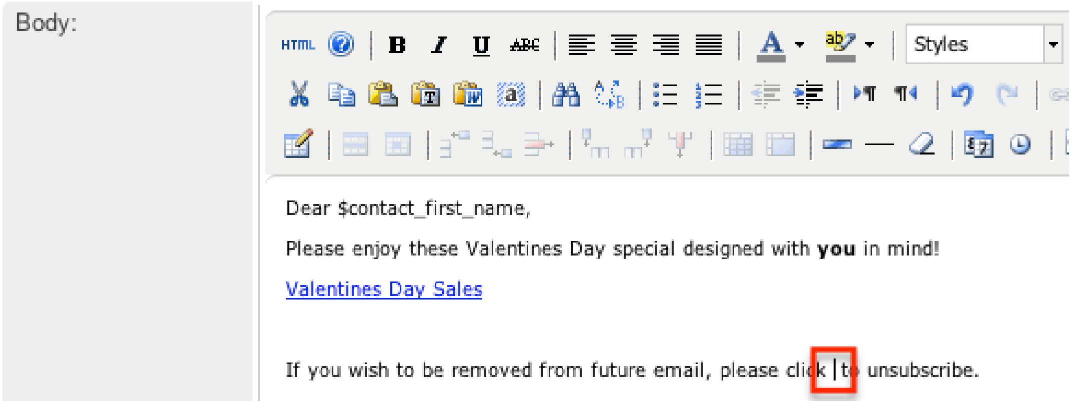


Inserting Tracker URLs

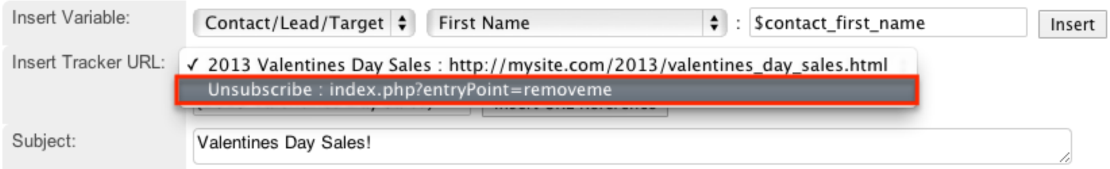
When constructing the body of your email, Sugar also allows you to insert redirect or opt-out tracker URLs.

Use the following steps to insert a tracker URL or opt-out link into the template.

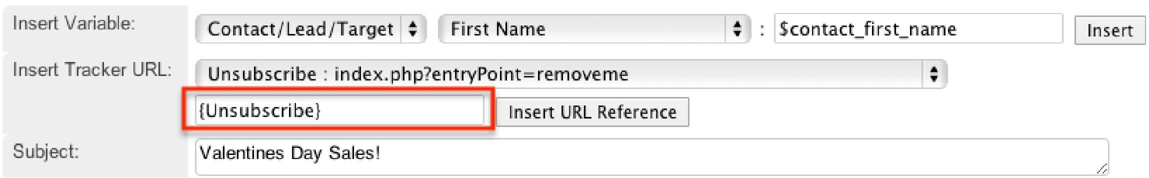
1. Click to place your cursor on the location in the body where the link should appear.



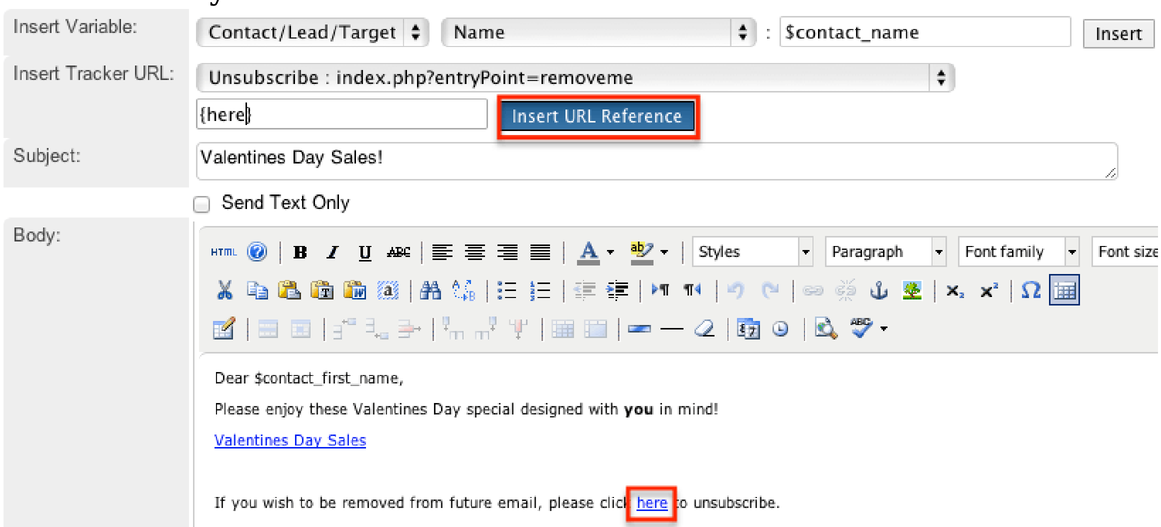
2. Select the link you wish to add from the Insert Tracker URL dropdown.
    - **Note**: For more information on creating tracker URLs, please refer to the Creating Tracker URLs section.



3. Type the text you wish to appear as a link between the curly brackets in the text box to the right of the dropdown.



4. Click the Insert URL Reference button to place the link in the body of the email where your cursor is located.



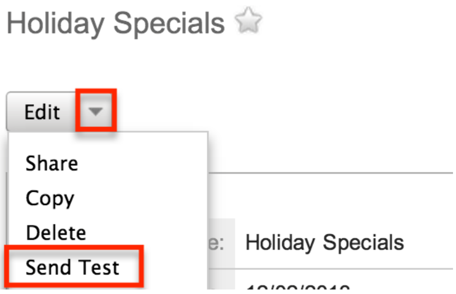
After sending the email campaign, you can see how many people and who exactly clicked on which links in your email message via the campaign's View Status page.

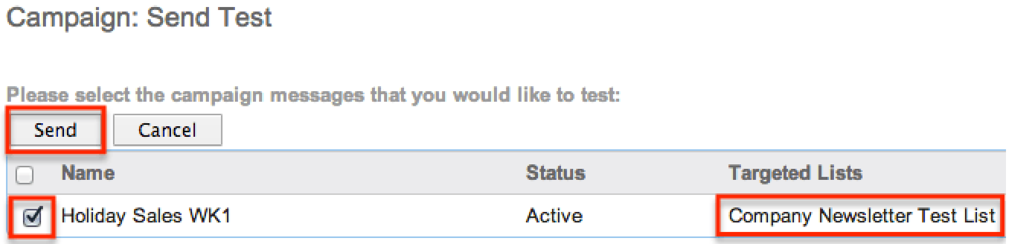
Testing Campaigns

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.
   

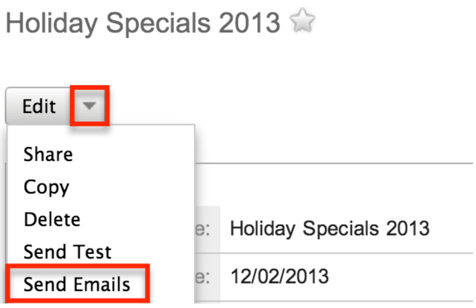
3. Select the Email Marketing record and test target list combination that you would like to test and click "Send".
   - **Note**: If an Email Marketing record does not have a test-type target list associated to it, then the Targeted Lists section will remain empty and no test emails will be sent.
     

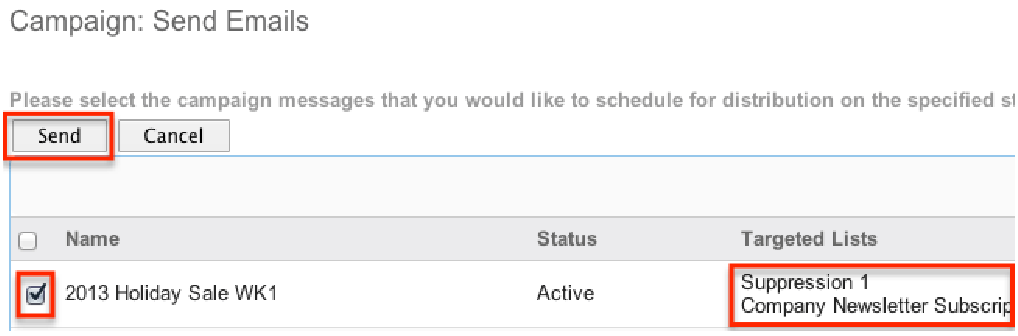
You can send the campaign to the test target list multiple times by clicking the Delete Test Entries button on the View Status page. You will need to do this after each test in order to delete the log entries on the campaign status and allow Sugar to send to the test list recipients again. Please note that sending to these recipients again will be prevented until the previous test's entries have been deleted. Also, please be sure that the test entries are all deleted once the campaign is ready to be sent so that the statistics from the test will not be included in the actual campaign's results.

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 at 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 default target list that you would like to receive the email campaign then click "Send".
    - **Note**: If the email marketing record does not have a default-type target list associated with 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 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.

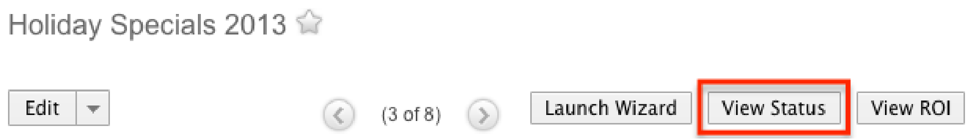
Note: When a campaign is sent to a target list, deleting that target list or unlinking it from the campaign will not remove the recipients from the email queue, and the emails will be sent when the scheduler runs. Administrators can delete emails via the email queue before they are sent.

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, how many leads and contacts were created from the campaign, etc. This enables you to evaluate the effectiveness of the campaign.

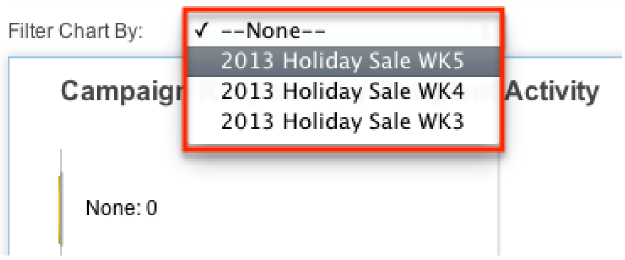
Use the following steps to view the Campaign Status page:

1. Navigate to a campaign record's detail view.
2. Click the View Status button on the upper right of the page.



Campaign Status Chart

This is a visual representation of the counts of your recipient's 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 up 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.

Message Queue

(1 - 2 of 2)

Recipient Name	Recipient Email	Marketing Id	Send On
Carmella Belew	Carmella.Belew@email.co	2013 Holiday Sale WK1	02/11/2013 01:00am
Robert Smith	robert.smith@email.co	2013 Holiday Sale WK1	02/11/2013 01:00am

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 into your campaign strategy.

Message Sent/Attempted

Add To Target List

Recipient Name	Recipient Email	Marketing Id	Activity Type	Activity Date
Robert Smith	robert.smith@email.co	2013 Holiday Sale WK1	Message Sent/Attempted	02/26/2013 12:14pm

The following subpanels measure different aspects of your recipient's 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 Messages, 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 as "Opted Out" on their Sugar record. For more information, refer to the Understanding Campaign Opt Outs article.

- **Suppressed by Email Address or domain**: The list of email addresses that were not sent the campaign email because the email address was marked as opted out, belonged to a suppression list, or was an invalid address.

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 on the Campaign Status page 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

(1 - 4 of 4)

Name	City	Billing Country:	Phone	
XY&Z Funding Inc	Cupertino	USA	(233) 381-4991	edit
Tortoise Corp	Ohio	USA	(471) 905-7799	edit
T-Cat Media Group Inc	Santa Fe	USA	(992) 954-1698	edit
NW Bridge Construction	Los Angeles	USA	(021) 980-0180	edit

- **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 record 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 record view.
- **Opportunities**: The list of opportunities that are related to this campaign record either through lead generation and then conversion or manually

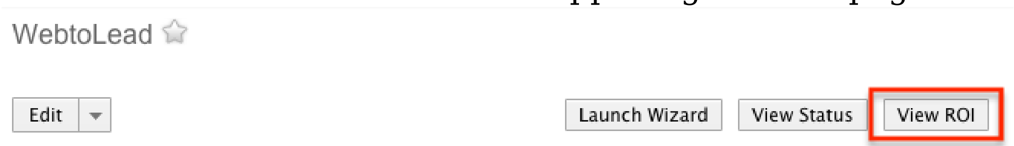
related through the Campaign field on the opportunity's record view.

Viewing Campaign ROI

For campaigns (Email and Newsletter) that are executed through Sugar, you can view the campaign's return on investment by clicking the View ROI button in the Campaigns detail view. The return on investment chart 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 amount entered in the campaign overview screen are displayed as bars in the campaign return on investment chart. The actual revenue is calculated from 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 on the upper right of the page.



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

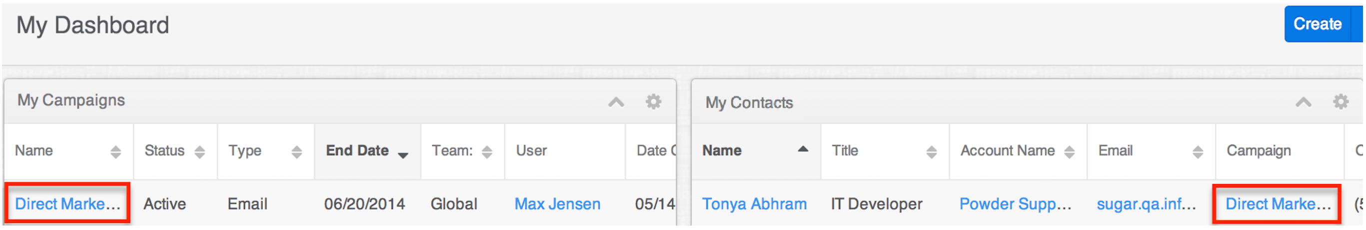
The Campaigns detail view displays thorough campaign information including all campaign fields followed by subpanels of the campaign's related records. The detail view can be reached by clicking a contact record's link from anywhere in the application including from the Campaigns list view. For more 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. Click the Actions menu in the Campaigns Module Tab to see a list of your most recently viewed campaigns and click each name to open the Campaigns detail view.

Viewing Via Dashlets

Sugar dashlets allow users to get a quick view of various records, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane for modules (e.g., Accounts) using the Sidecar user interface. You can view campaign information in List View dashlets specific to the Campaigns modules (e.g., My Campaigns dashlet), as well as List View dashlets based on other modules such as "My Contacts". Clicking a campaign's name from any dashlet will open the Campaigns detail view. For more information on using dashlets and viewing campaign records via dashlets, please refer to the Dashboards and Dashlets 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 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.

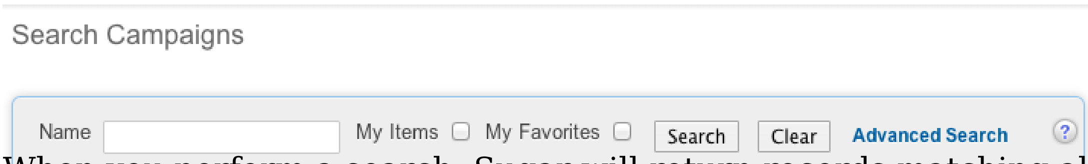
For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the Search documentation.

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 perform 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 matching names 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.

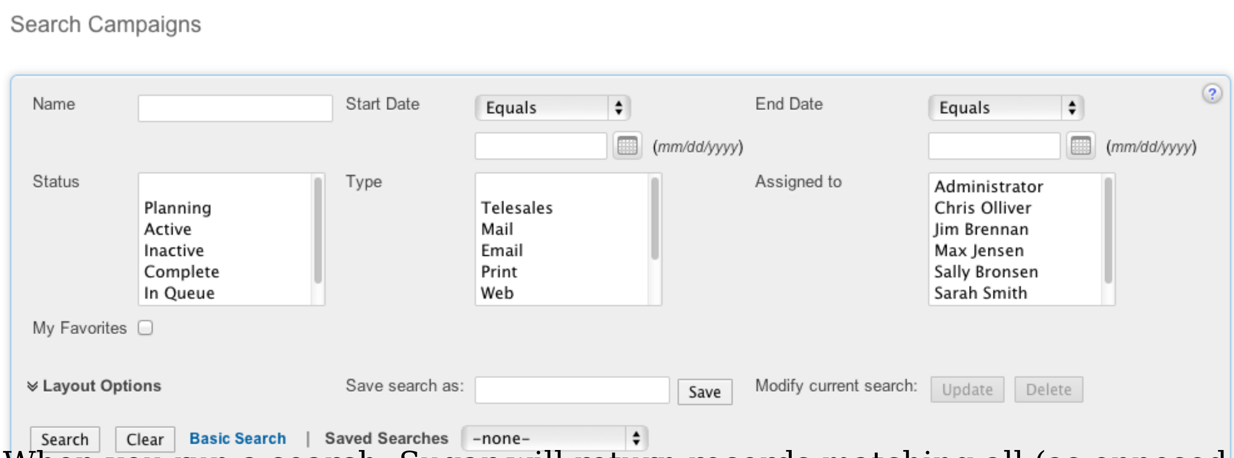
Administrators can configure what fields appear on the Campaigns Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration Guide.

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 that 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 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 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. 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 and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword.

For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.
Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation.

Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation 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 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

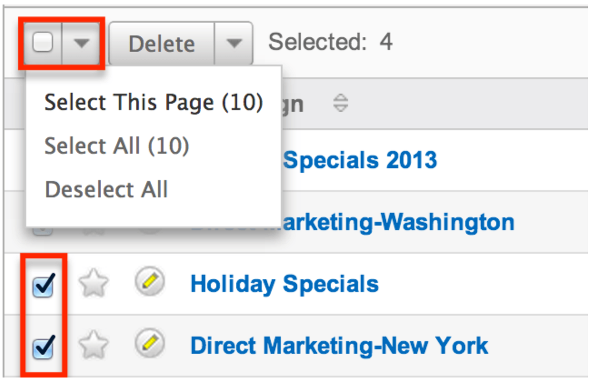
List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel, you can see which records of the total results set are currently being displayed. The two single-arrow Next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

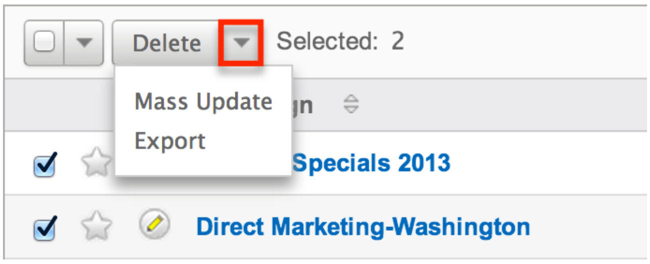
You can perform several actions on campaign records directly from the list view by first selecting the desired records. To select individual campaign records on the Campaigns list view, mark the checkbox on the left of each row. To select or deselect multiple campaign records on the list view, use the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

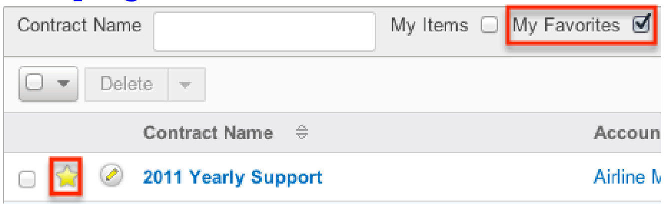


The options in the actions menu allow you to perform the following operations:

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.

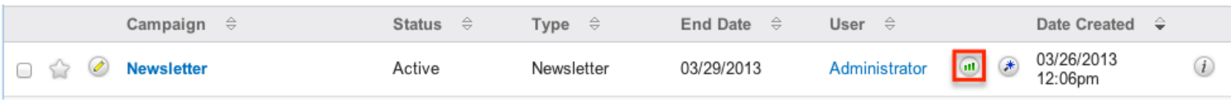
Favorite Designation

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.



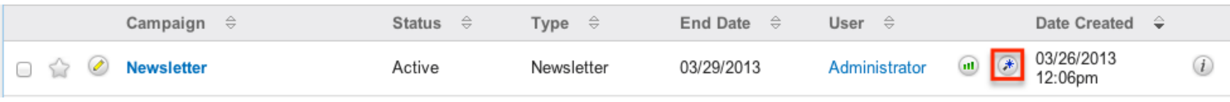
Campaign Status

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.



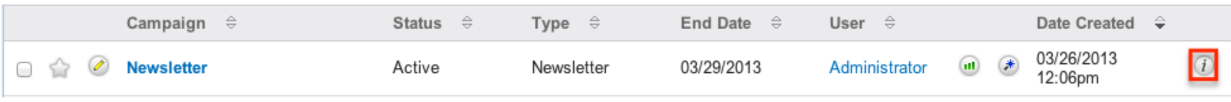
Campaign Wizard

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.



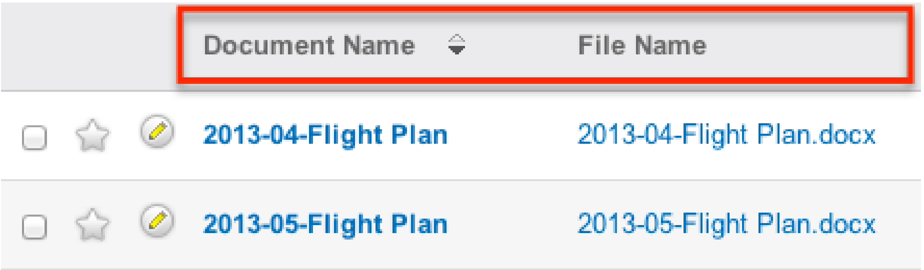
More Information

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.



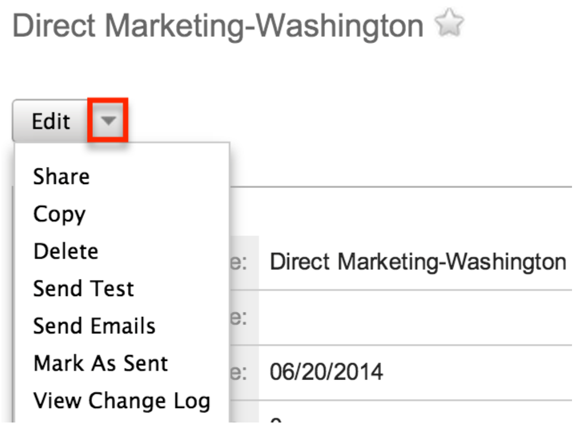
Campaigns Detail View

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 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 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.

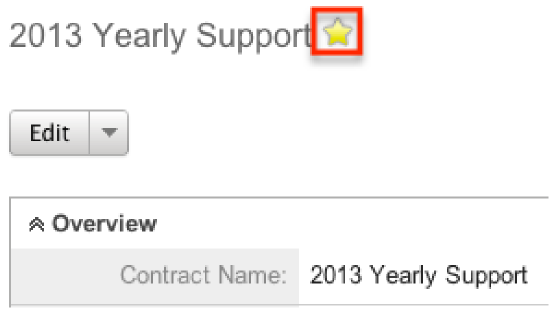


The options in the actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this campaign.
Share	Share a link to this campaign via email.
Copy	Duplicate this campaign.
Delete	Delete this campaign.
Send Test	Send test emails for this campaign.
Send Emails	Send all emails for this campaign.
Mark As Sent	Mark a non-email campaign as being sent.
View Change Log	View a record of changes to this campaign.

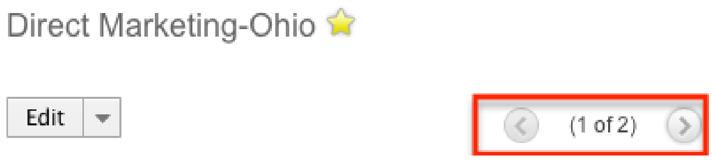
Favorite Designation

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 Campaigns module tab. In the Campaigns detail view, the star on the right of the campaign's name is yellow once marked to indicate a favorite campaign. 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.

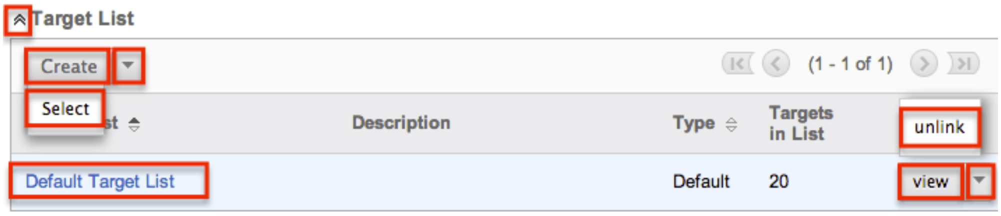


Related Record Subpanels

Every campaign record's detail view will display subpanels that 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.

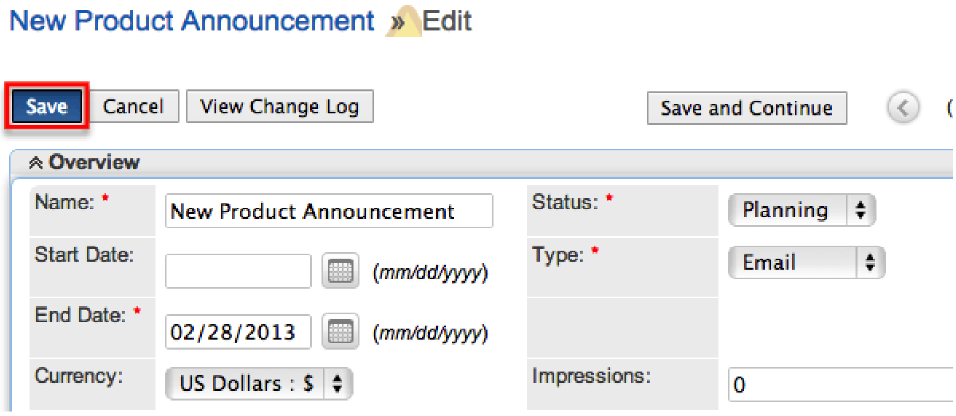
- To view the details of a related record, click the record's name in the subpanel to open it in detail view.
- To relate an existing record to the campaign, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the campaign, click "Create" on the upper left of the subpanel, then complete the Record View layout and click "Save".
- To edit the campaign's related record, click either the record's name or the View button to the far right of the record's row to open the record view and edit as necessary.
- To delete the campaign's relationship to a record, choose "Unlink" from the Actions menu 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.

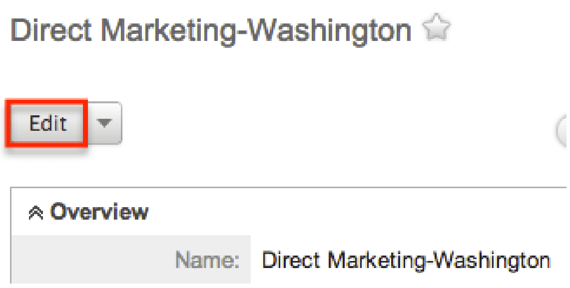


Please note that your ability to edit campaigns in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation. Check with your system administrator if you do not see the Edit options.

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.

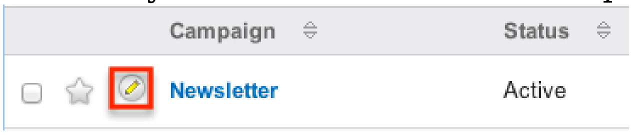
Editing Via Detail View

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. The edit view layout will open and you can update the necessary fields then click "Save" to preserve your changes.



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.

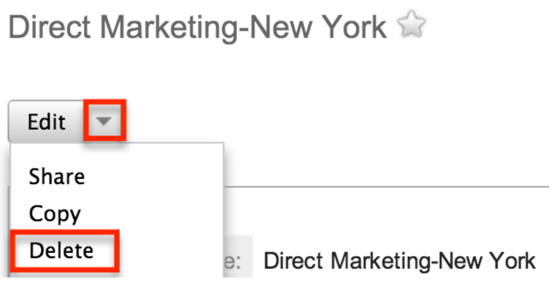
Please note that your ability to delete campaigns may be restricted by a role.

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.

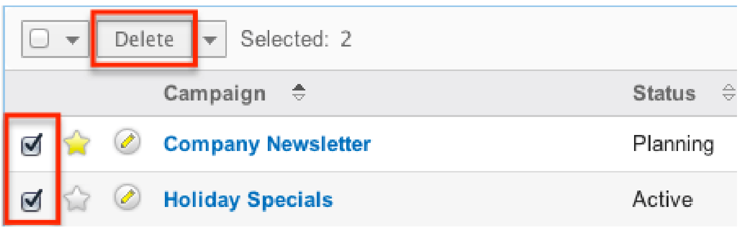


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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.

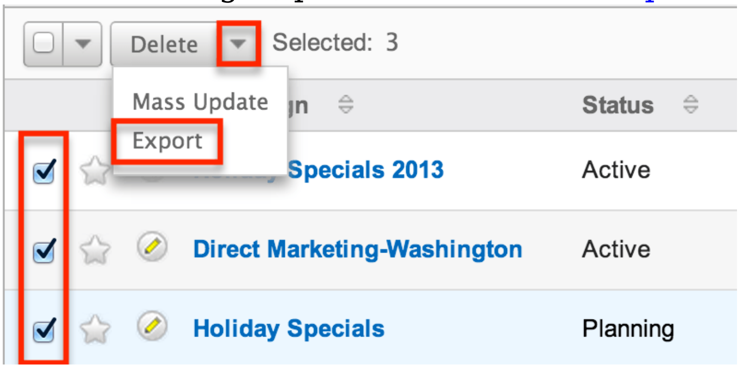


5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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 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.

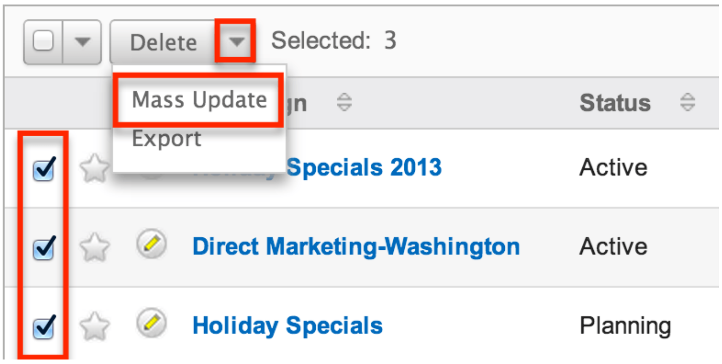
Mass Updating Campaigns

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.

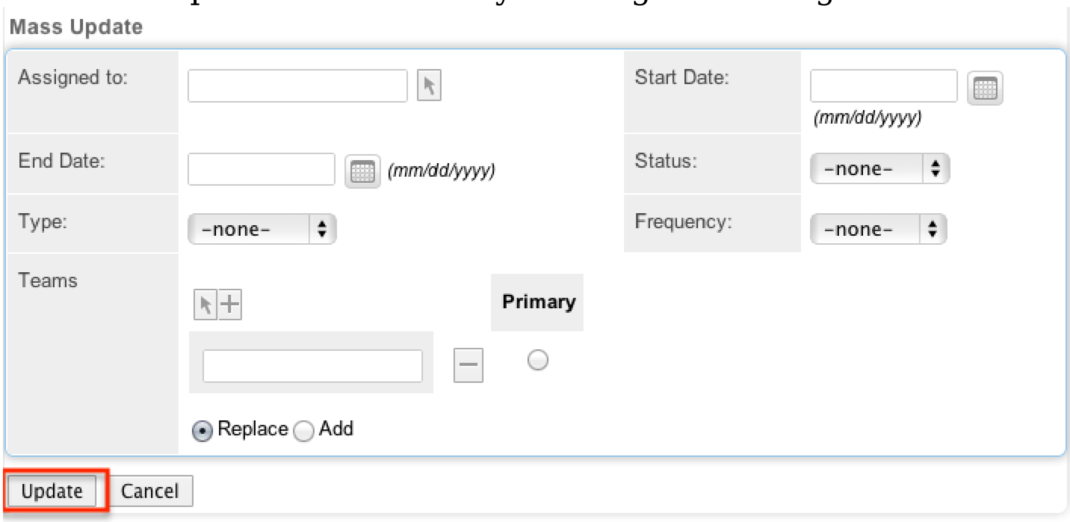
Please note that your ability to mass update campaigns may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration Guide. Check with your system administrator if you do not see the Mass Update option.

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.

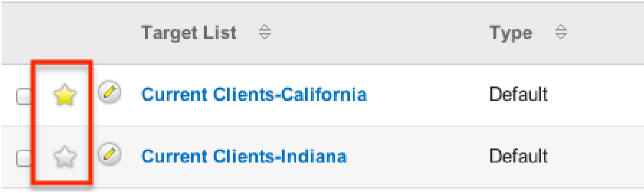
Favoriting Campaigns

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:

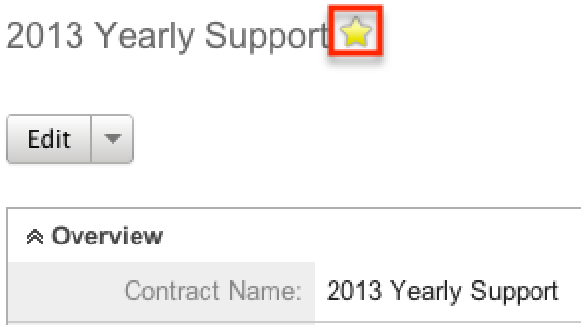
1. Navigate to the Campaigns list view by clicking the Campaigns module tab.
2. Use the Basic or Advanced Search to find the campaign records you wish to mark as favorites.
3. Click the star icon on the left of each desired campaign's row.
4. To remove the campaign as a favorite, click the star again to revert it to white.



Favoriting Via Detail View

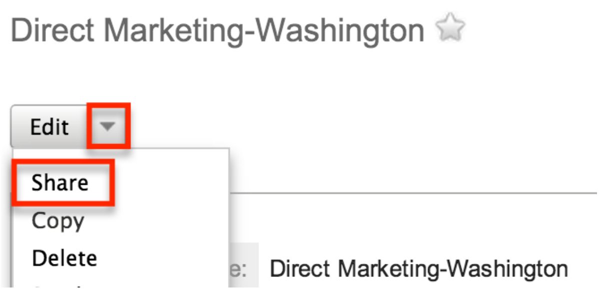
Use the following steps to mark records as favorites via the Campaigns detail view:

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.



Sharing Campaigns

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



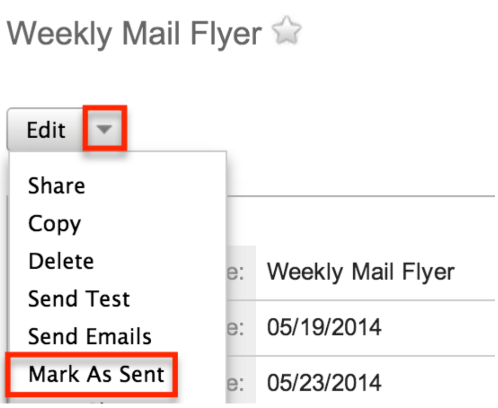
Users can simply click the link in the email to access the campaign record in Sugar. Please note that the user must be logged in to Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration Guide.

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 an 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.

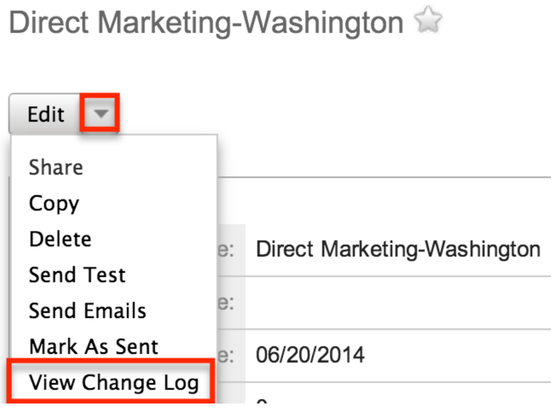
Use the following steps to mark a campaign as sent via the Campaigns detail view:

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.

Last Modified: 2021-12-21 14:37:09

Web-To-Lead Forms

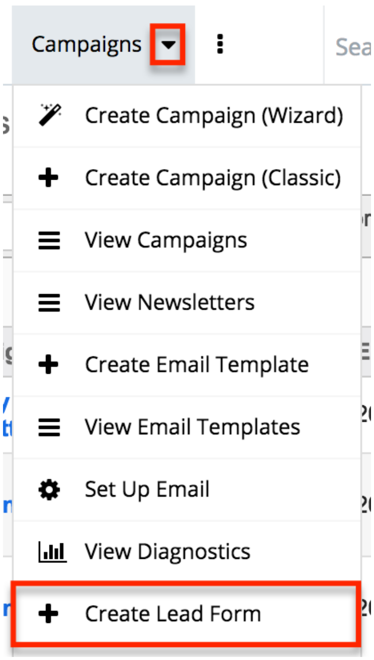
Overview

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.

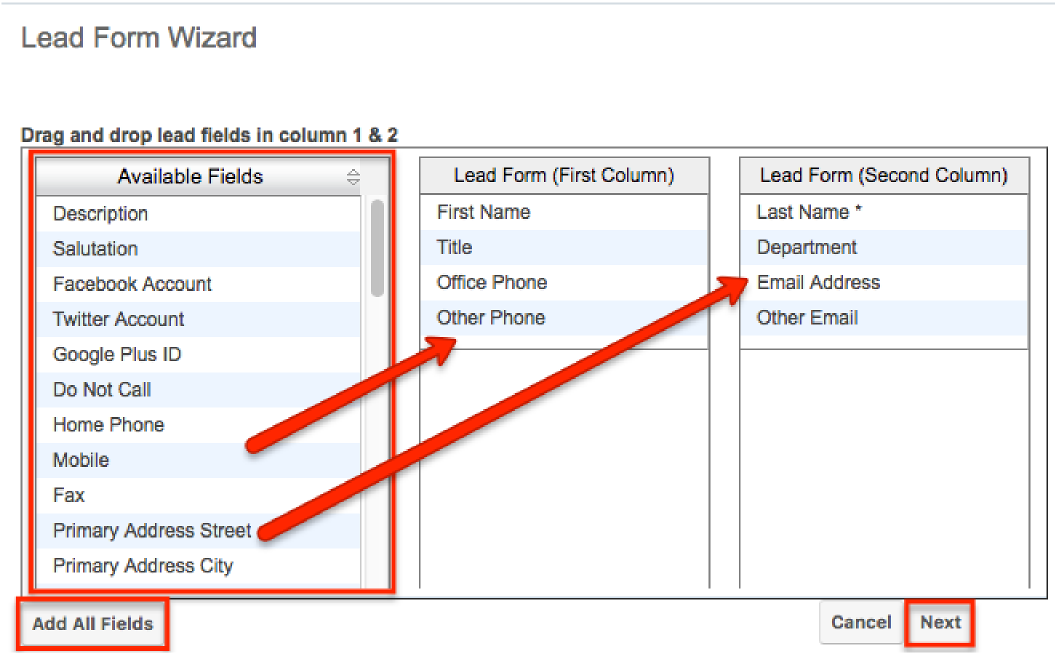
Note: Web-to-Lead forms are not available for Sugar Serve users. For more information on license types and the functionality available for each type, refer to the User Management documentation.

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. Click the triangle in the Campaigns module tab 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 desired fields have been moved to the appropriate columns, click the Next button to continue.

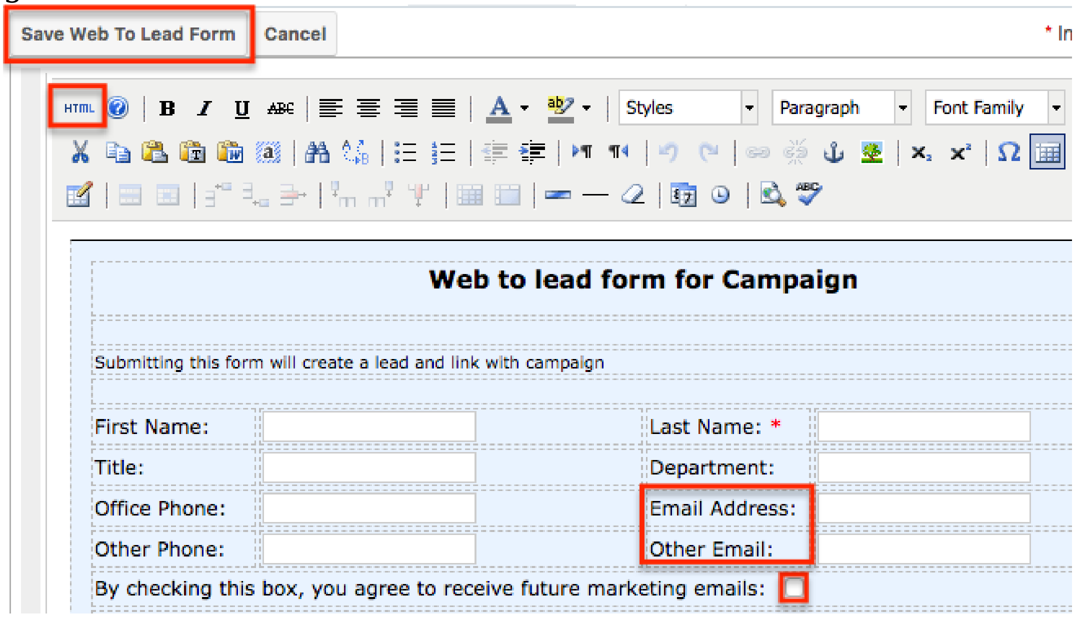


5. Enter appropriate values for the fields on the next page of the wizard:

    - **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.
    - **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.
    - **Submit Button Label**: Enter in the label for the button that will be used to complete the form. "Submit" is the default label but you can change this label (e.g., "Sign Up", "Save", "Complete") to best suit your needs. When the visitor clicks this button, the lead's data is first sent to your Sugar instance, and then the visitor is redirected to a new page, which can be configured via the Redirect URL field.
    - **Post URL**: This is the location the form will send the data entered and is defaulted to your instance of Sugar. Enable the "Edit Post URL?" checkbox 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.
    - **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".
    - **Redirect Request Type**: Choose how the redirect will be performed. This field is editable only if "Redirect URL" is populated.

        - "GET" will send the data that the visitor entered into the form fields as URL parameters. This means that the values can be read by programming done on your website, which may be helpful if you want to create a custom "Thank you" page that displays the answers that the visitor submitted. However, the answers would also be visible to anyone who can see the web history for the person who completes the form. In other words, if your Redirect URL is set to www.mycompany.biz/thankyou, then the browser will append the form values entered to the URL for each visitor like so: www.mycompany.biz/thankyou?name=Joe%20Smith&phone=412-555-1234&message=Please%20call%20me%20back This method is not recommended for forms that collect sensitive or personally identifiable information. In addition, the number of characters that can be sent via GET is limited to the length that the URL can handle, so it is not recommended for long forms or those with many text-area fields, which may contain a lot of content. Please research the risks associated with each request method before deciding which is best for your use case.
        - "POST" will send the form's data through the request body, which is hidden from the casual web viewer. This is generally considered the more secure method when compared with GET.
    - **Include Form Results in Redirect**: Choose whether the resulting form values are sent as parameters along with the request to the Redirect URL. If this box is unchecked, you will not receive the form data with the redirect request. This field is editable only if "Redirect URL" is populated.
    - **Related Campaign**: Use the Select button to choose an existing campaign that is related to this lead form. Leads generated from this form will automatically be associated to this campaign.
    - **Assigned to**: Use the Select button to choose the Sugar user that should 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 will generate the HTML needed for your form and show you a preview in a TinyMCE editor. If you desire, you can add additional text and images as well as change the layout of the form per your preference. You can click the HTML button to make advanced customizations and edit the generated HTML code.



9. Once any additional changes have been completed, click "Save Web To Lead Form".

Including Email Addresses on Forms

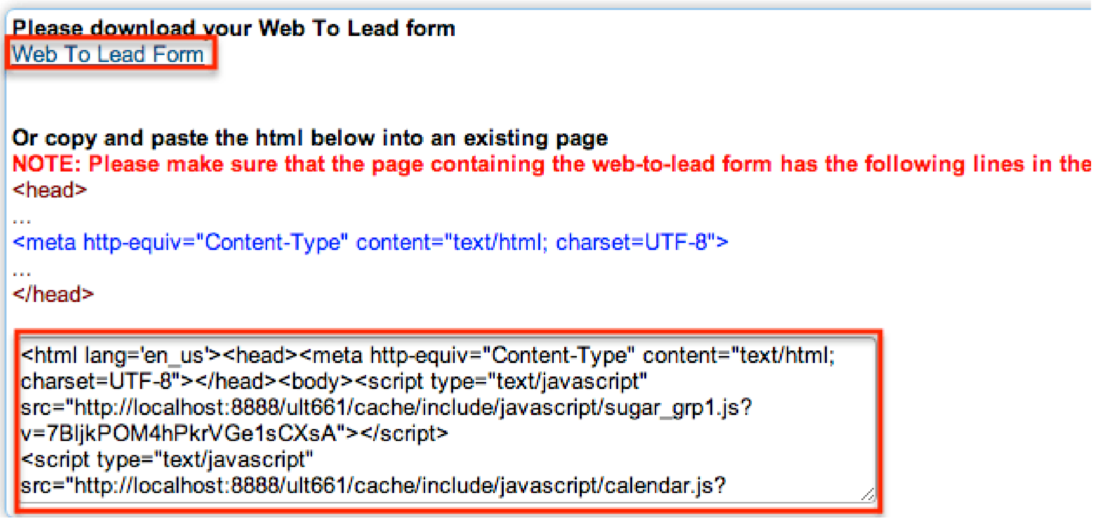
If the lead form contains any email address fields, an opt-in checkbox field (i.e., By checking this box, you agree to receive future marketing emails) will appear on the form which allows visitors to explicitly indicate that they wish to receive marketing emails. Please keep in mind that when the opt-in checkbox is enabled, this setting will apply to all email addresses entered on the form. In addition, if the global opt-out setting has been enabled via Admin > System Email Settings and the visitor enables the opt-in checkbox on the lead form, the opt-in setting will take precedence over the global opt-out setting when the lead record is created in Sugar. For more information about email address opt-outs, refer to the Emails documentation.

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.

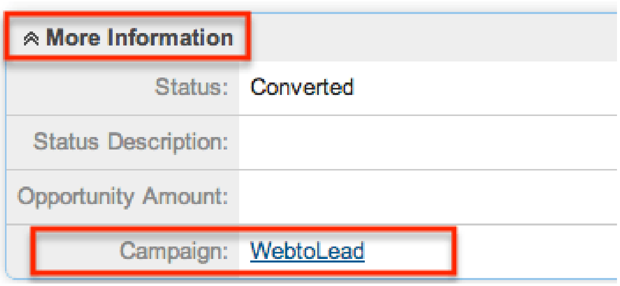


4. Once the web-to-lead form is accessible to your potential customers, include a link to the form on your corporate website, social media websites, or add as a tracker URL in a campaign. For more information regarding adding tracker URLs to a campaign, please refer to the Campaigns documentation.

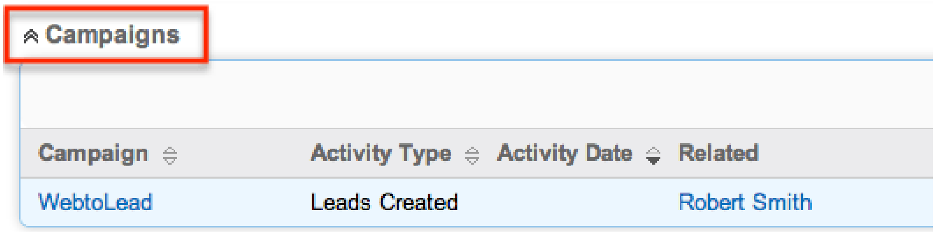
Lead Generation

Once a web-to-lead form is submitted, the data entered on the form becomes a lead record in your Sugar instance. Leads can be converted to contacts, accounts, and opportunities. For more information on the Leads module, please refer to the Leads documentation.

The campaign selected during form generation is linked to the created lead via the Campaign field under the More Information panel as well as the Campaigns subpanel.
More Information panel:

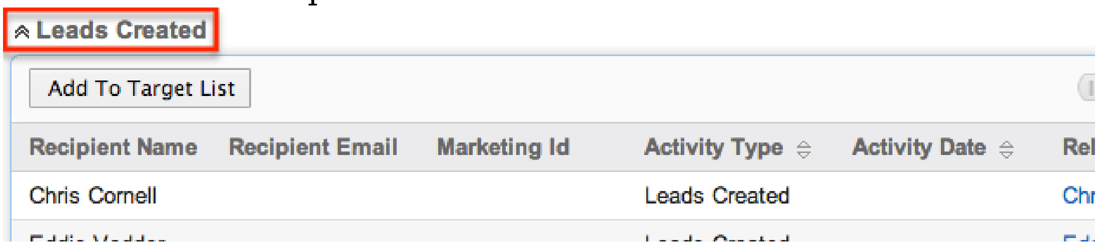


Campaigns subpanel:

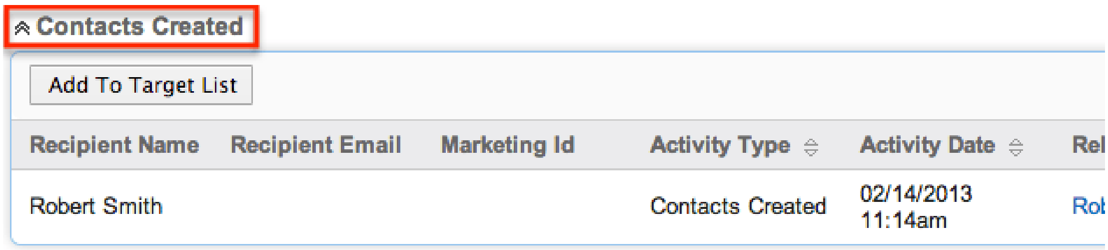


Leads created from the web-to-lead form can also be tracked on the Campaigns status page via the status chart and the Leads Created subpanel.
Status chart:

Leads Created subpanel:



If a lead that was generated from a 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.

Last Modified: 2022-01-14 14:30:46

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 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. Some reports can be rendered as charts that allow you to drill through to see the corresponding records. This page covers functionality specific to the Reports module. For instructions concerning views and actions which are common across most Sugar modules, such as viewing, editing, etc., please refer to the Working With Sugar Modules section of this page.

Note: Some of the examples in this documentation contain steps to create Opportunity reports. Users with Revenue Line Items enabled should adjust the steps to target the Revenue Line Items module. Users with Sugar Serve license types will not have access to opportunities or revenue line items but can adapt the steps to other modules in their Sugar instance. For more information on license types and the module functionality available for each type, refer to the User Management documentation.

Report Fields

The Reports module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. The following fields are available when viewing the Reports list view.

Field	Description
Accessed On	The date the report record was last opened.

Chart Type	The chart type (if applicable) defined for the report.
Date Created	The date the report record was created.
Date Modified	The date the report record was last modified.
Description	A description or other key information about the report. **Note**: The Description field is only viewable and editable via the list view preview.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field. **Note**: This field is not visible in the user interface.
Module	The target module (e.g., Accounts) associated with the report.
Name	The name of the report.
Report Type	The report type (Rows and Columns Report, Summation Report, Summation Report with Details, Matrix Report) specific to the report.
Tags	User-created keywords that can be used to identify, organize, and group report records by common attributes. **Note**: The reports module contains over 100 stock reports that are pre-tagged using a combination of the following out-of-the-box tags: • Stock Report • Sales and Marketing • Customer Service • Data Privacy • Administrative For more information on tags in Sugar, please refer to the Tags documentation. For more information on stock reports,

	please refer to the Stock Reports documentation.
Team	The Sugar team(s) assigned to the report record.
User	The Sugar user assigned to the report record.

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 information for records that meet the specified criteria, but each type 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. For more information on creating a Rows and Columns report, please refer to the Rows and Columns Report section.

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 displays the data in groups, summarized using computed derivatives (e.g., SUM, AVG, MAX, MIN) from numeric-type field values (e.g., Likely) 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.

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., Contact Name, Account Name, Email

Address) as well. You can group the report based on one or more fields from the target or related module. Summation Report with Details can be viewed 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.

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 display in a grid table with row and column headers. The numeric field values for all display summaries appear on the table along with the 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.

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. The first step of creating a report via the Report Wizard is to choose the report type, and the steps to create the report vary slightly depending on the report type chosen. Please note that you can create reports in Sugar via the Reports module itself using the Create options as well as by duplicating an existing report via the Copy option.

Creating via Reports Module

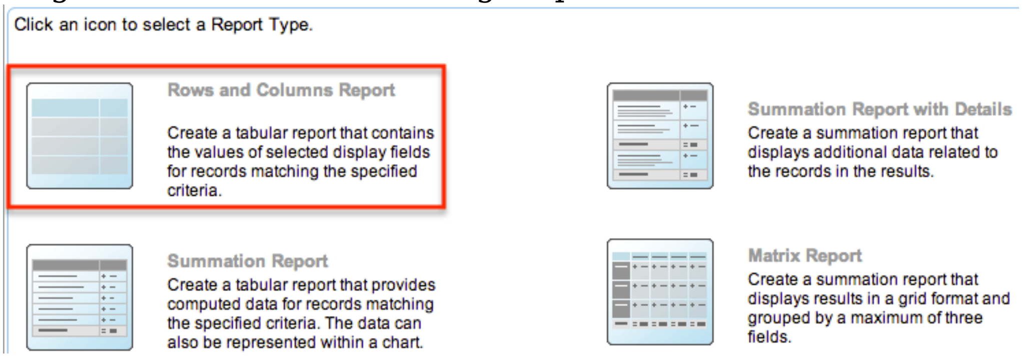
The most common method of report creation is via the Reports module using the Create button in the list view or the Create Report option in the module tab. This opens the Report Wizard which allows you to build the necessary report and generate the results accordingly. The following sections cover creating the four different report types via the Reports module.

Creating a Rows and Columns Report

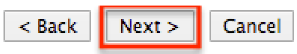
Of the four report types, the Rows and Columns report is the most basic one to create in Sugar. Users can simply define filters to determine which records the report will include or exclude then choose the fields (e.g., Name, Email Address) they would like displayed in the report result. The Rows and Columns report creates a tabular report containing the values of selected display column fields for all records meeting the specified criteria.

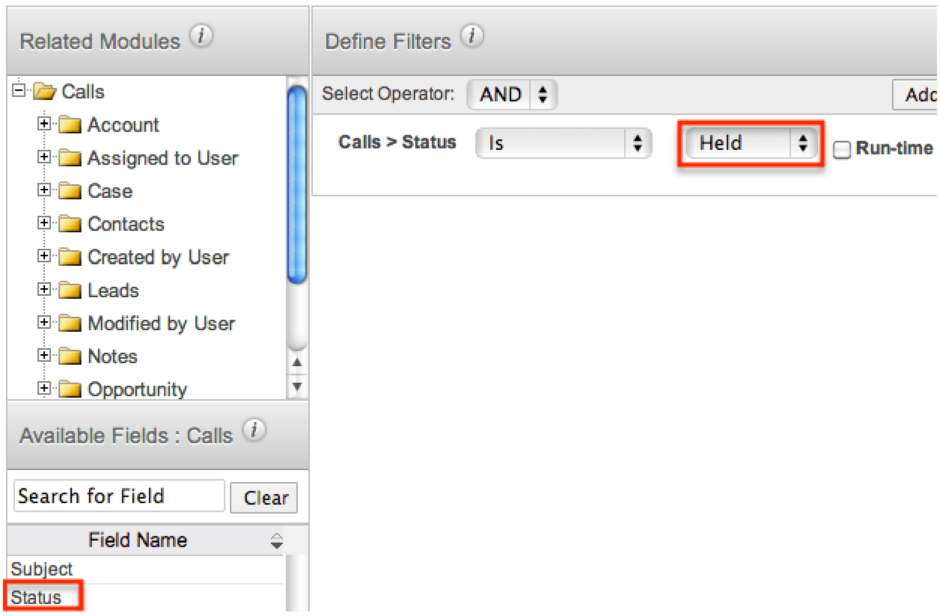
The following steps cover creating a Rows and Columns report for calls with a status of "Held" as an example:

1. Click the triangle in the Reports module tab 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 to add it to the list of filters. In this example, 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.

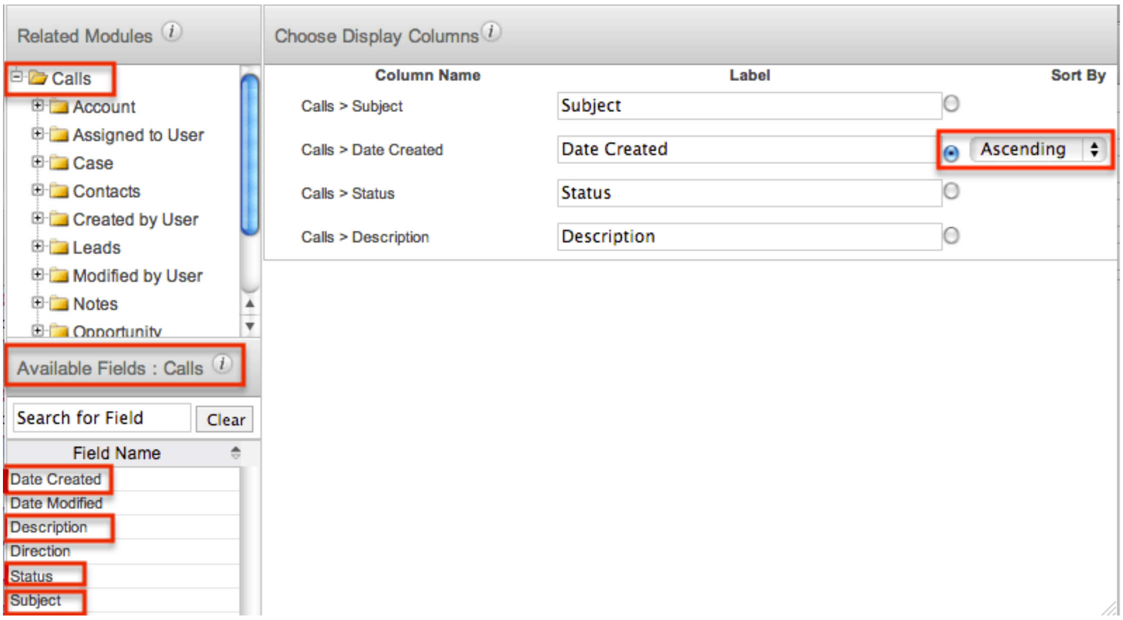




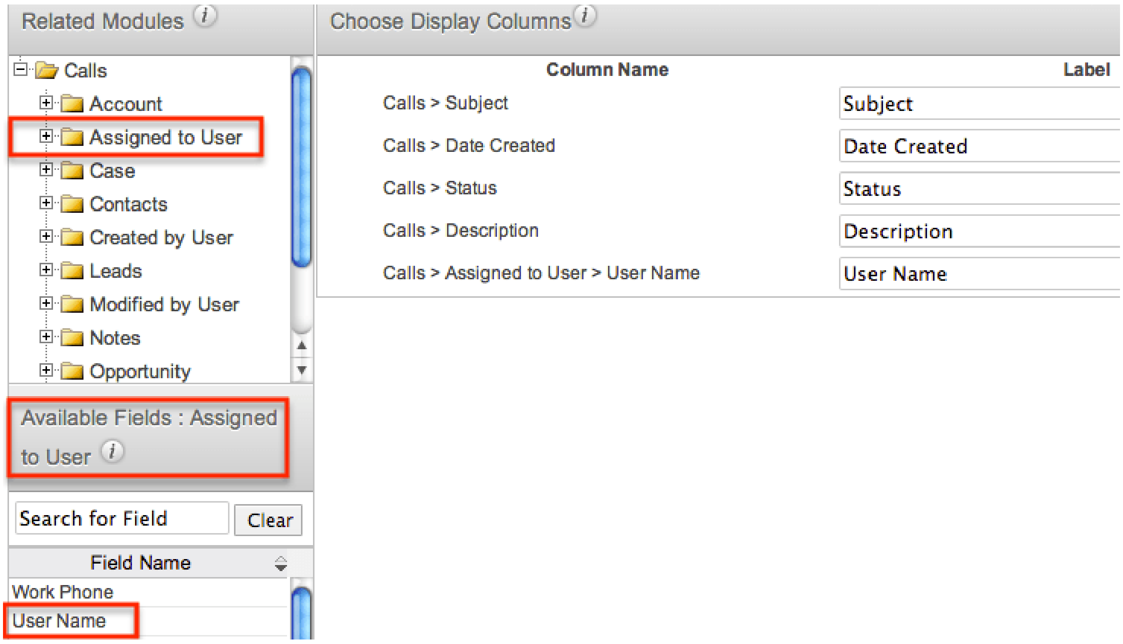
4. On the Choose Display Columns step, select the fields you would like included in the report results from the Available Fields list then click "Next". We are adding the following fields as an example: Subject, Status, Description, Date Created, User Name, Contacts Name, and Account Name.

- For more information on selecting display column fields, please refer to the Report Display Columns section.

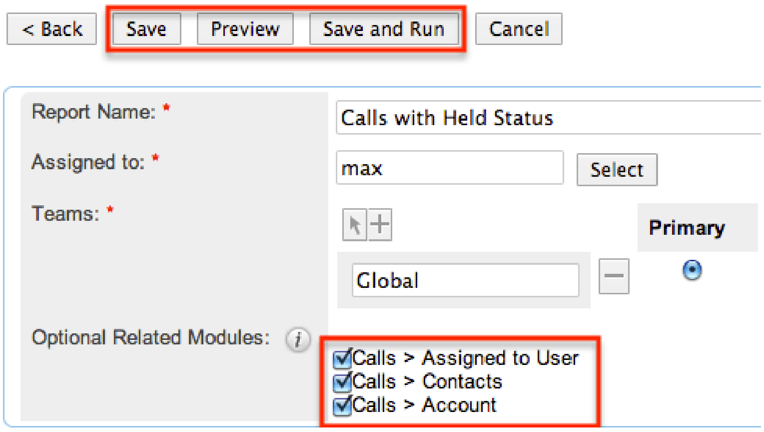
5. Select "Subject", "Date Created", "Status", and "Description" in the "Available Fields: Calls" list, as these are fields contained in the Calls module. By default, the target module's fields display in the Available Fields list.
    - **Note**: You can designate the generated report to be sorted by 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.



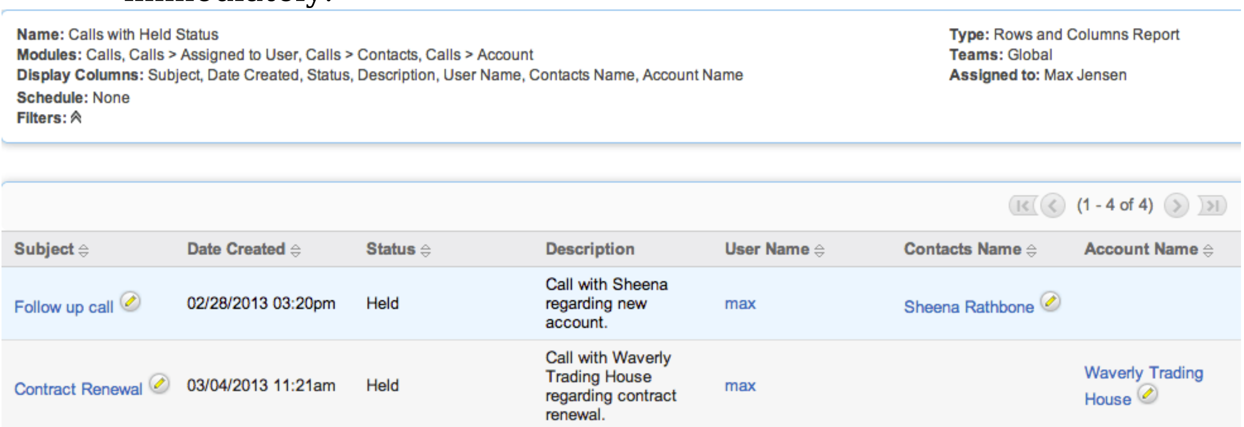
6. For the User Name field, click "Assigned to User" from the Related Modules list at the top left then select "User Name" from the "Available Fields : Assigned to User" list.
    - **Note**: User names are stored in their own table in the database and are related to the modules in Sugar. So even though the Assigned User field appears in various module layouts, they are not direct fields in those modules.



7. For the Contact 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 displays "Name", but you can change the label to "Contact 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.
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 Changing Display Column Labels section.
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.
10. Click "Next" after adding all of the appropriate fields.
11. On the Report Details step, enter the report name and assign it to the desired 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 must mark the Optional Related Modules boxes. For more information on marking related modules as optional, please refer to the Optional Related Modules section.



12. After entering the report details, click "Save and Run" to save and generate the report immediately.
    - Clicking the Preview button allows you to preview the report before saving.
    - Clicking the Save button saves the report without running it immediately.

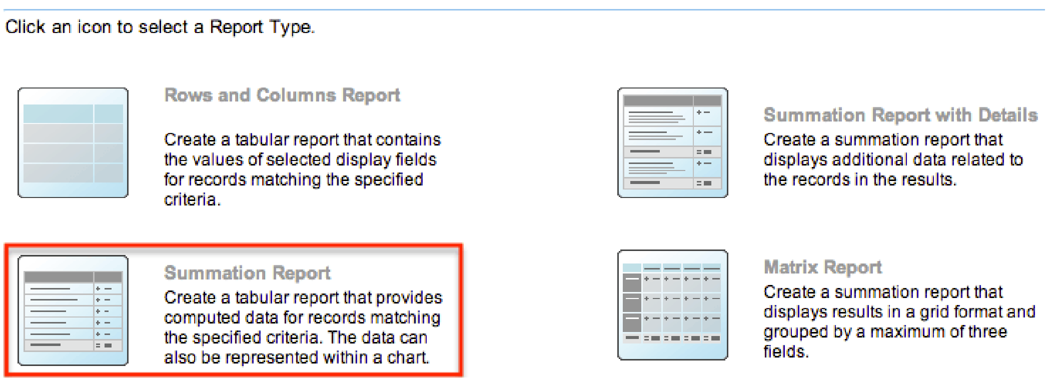


Creating a Summation Report

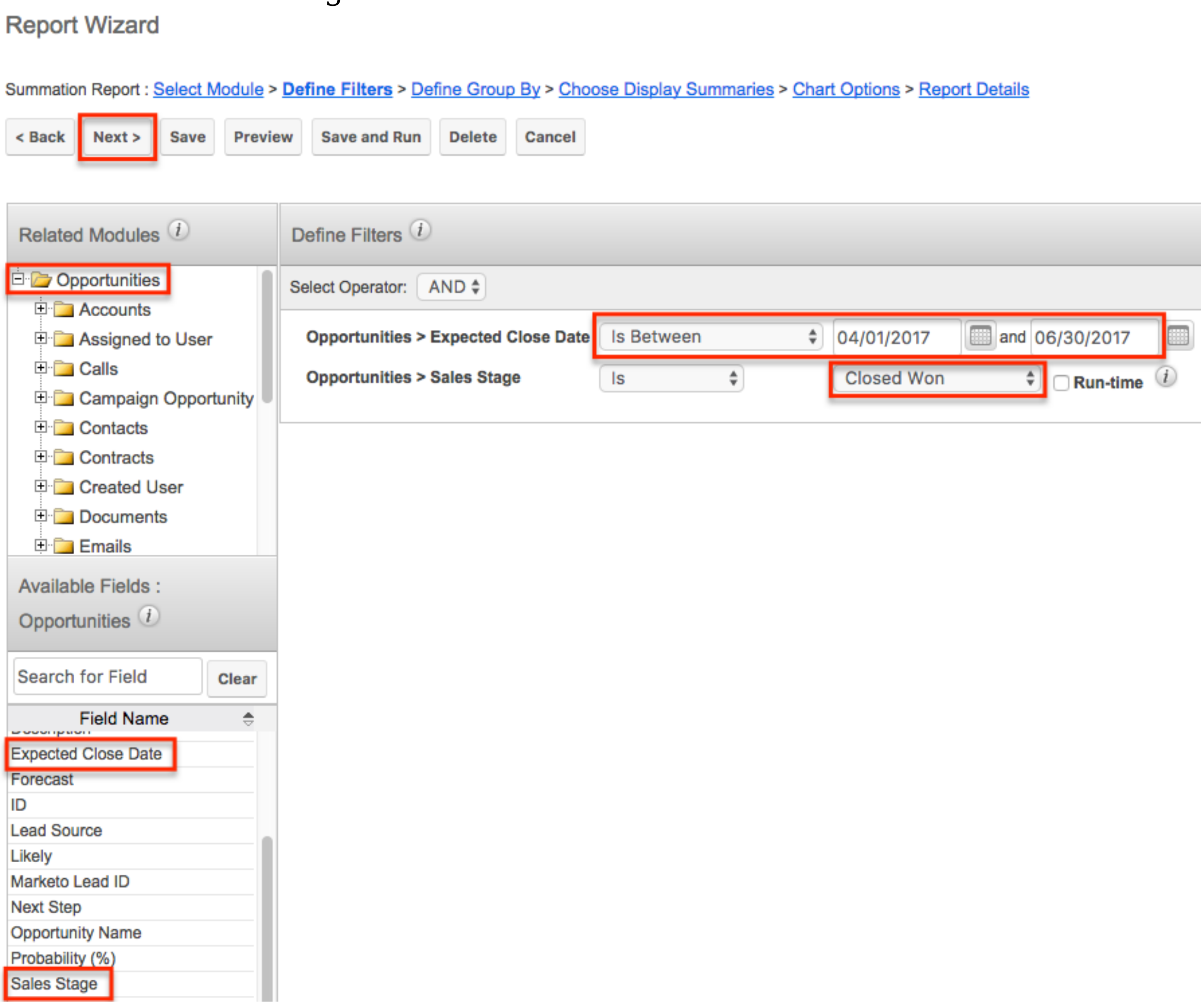
The Summation Report groups and provides computed data for records that meet the specified criteria. You can choose a number of group-by columns to group the data in the report and can define group-by data for related modules as well. You can also drag and drop the group-by fields to a different order 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 any display columns in the report.

The following steps cover creating a report to capture closed won opportunities for Q2 2017 grouped by assigned user and the month it was closed as an example:

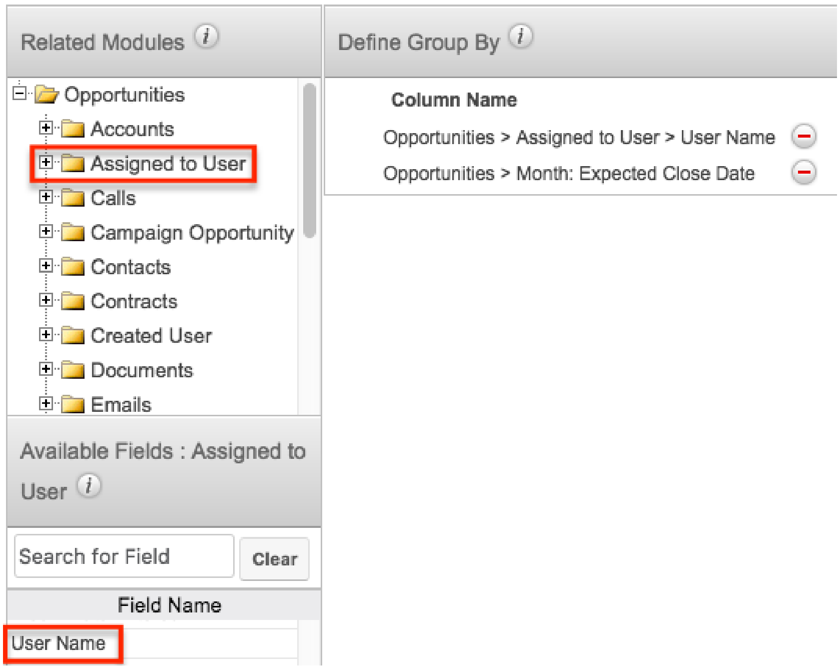
1. Click the triangle in the Reports module tab and select "Create Report".
2. Choose "Summation Report" as the report type and "Opportunities" as the target module.



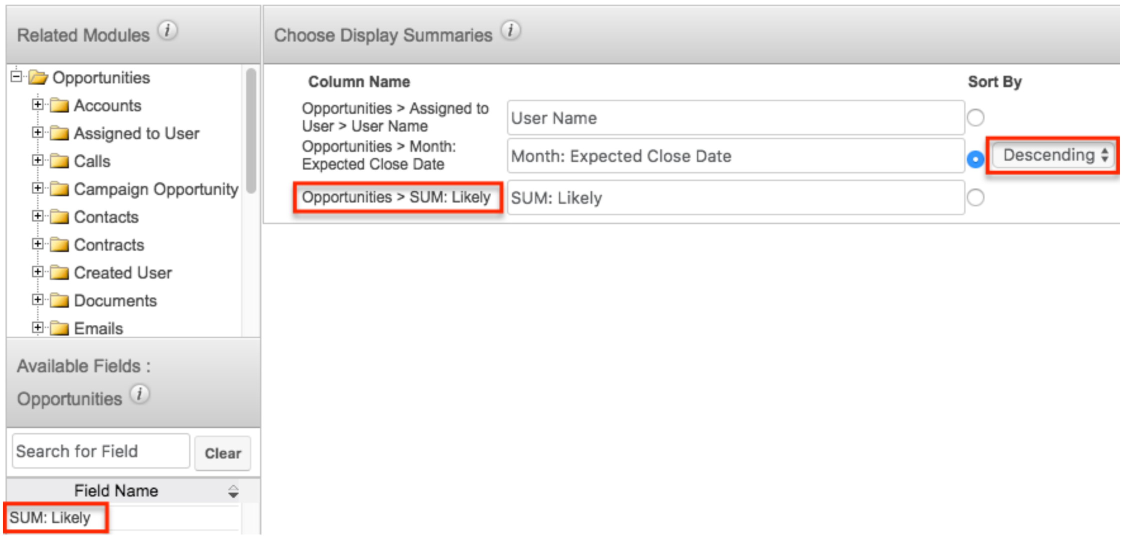
3. Next, define the [report filters](#) as follows then click "Next":
    - Select "Expected Close Date" from the Available Fields panel, then choose "Is Between" and select "04/01/2017 and 06/30/2017" from the options appearing to the right of the Expected Close Date filter.
    - Select "Sales Stage" from the Available Fields panel, then choose "Is" and "Closed Won" in the dropdowns appearing to the right of the Sales Stage filter.



4. On the [Define Group By](#) step, select "User Name" and "Month: Expected Close Date", which will group the closed won opportunity records by the assigned user and month it was closed. Click "Next".

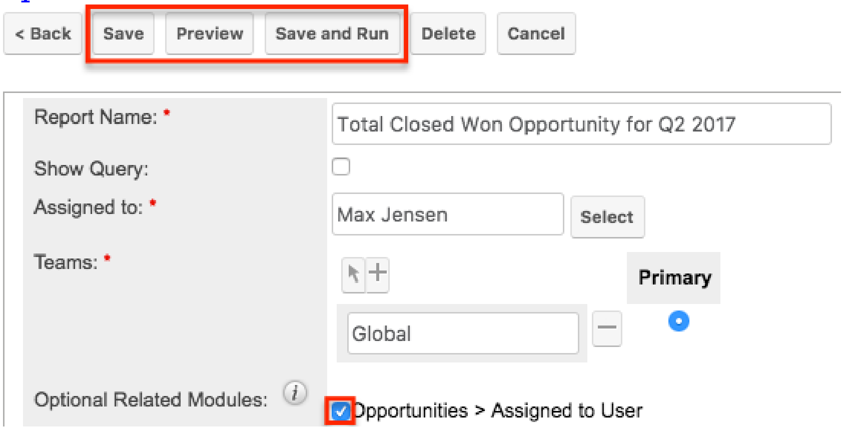


5. On the Choose Display Summaries step, select "SUM: Likely" to summarize the report based on the opportunity's likely total amounts. Click "Next". Please note that the field(s) selected in the Define Group By step are automatically included in the Choose Display Summaries step.
   - **Note**: You can sort results by a specific field column in either ascending or descending order. Simply select the radio button next to the field label (e.g., Month: Expected Close Date) then select "Ascending" or "Descending" in the corresponding dropdown list.

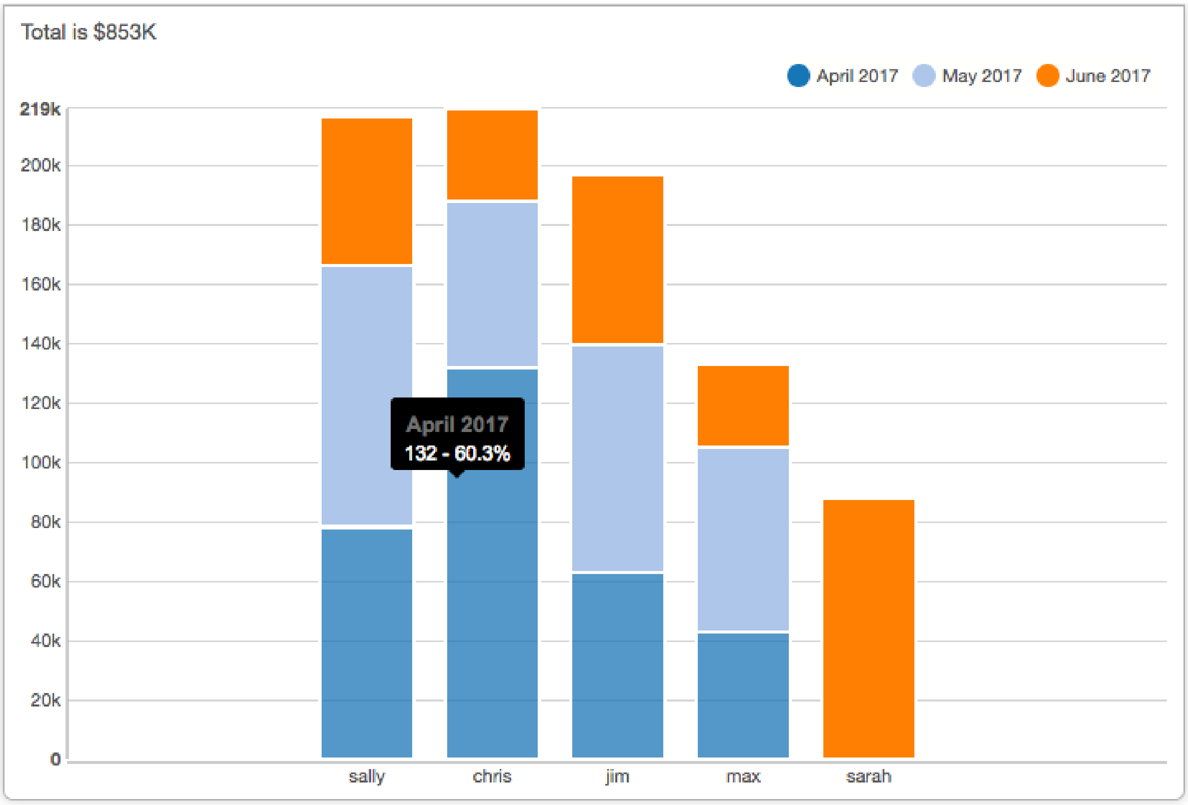


6. On the Chart Options step, select the type of chart, if any, that you wish to display in the report as well as how the data should be summarized on the chart, then click "Next". For more information on setting up the chart options, please refer to the Report Chart Options section.
7. On the Report Details step, enter a name for the report and assign it to the appropriate user and team.
   - **Note**: Enable the "Optional Related Modules" box to include all

closed won opportunities whether or not they are assigned to a user. For more information regarding this option, please refer to the Optional Related Modules section.



8. After entering the report details, click "Save and Run" to save and generate the report immediately.
   - Click the Preview button to preview the report before saving.
   - Click the Save button to save the report without running it immediately.
   - To view the values corresponding to a section of the chart, hover your mouse over the section.
   - To view the list records corresponding to a section of the chart, simply click the bar in the chart. For more information, refer to the Drilling Through Charts section.



User Name	Month: Expected Close Date	SUM: Likely
sally	June 2017	$50,337.00
chris	June 2017	$30,790.00

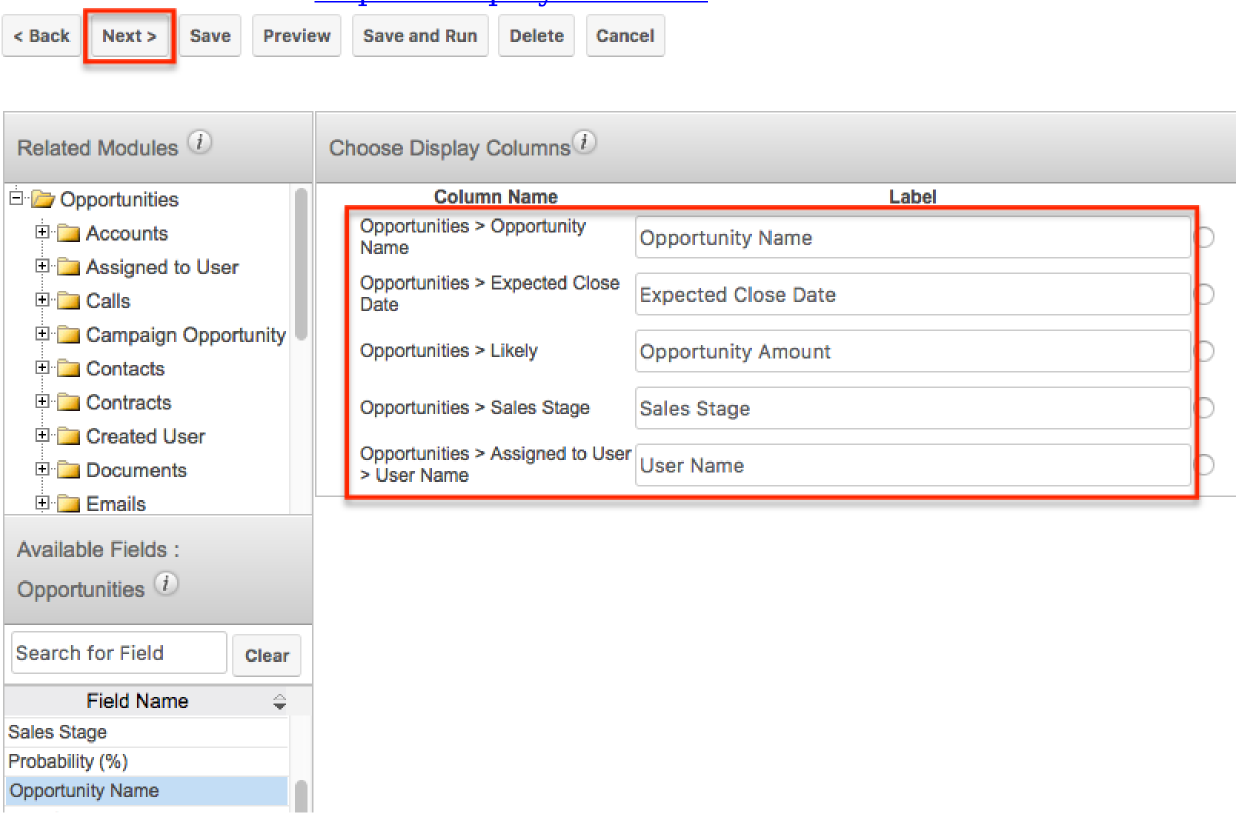
Creating a Summation Report with Details

The Summation Report with Details groups and summarizes data 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 to capture closed won opportunities in 2016 grouped by month as an example:

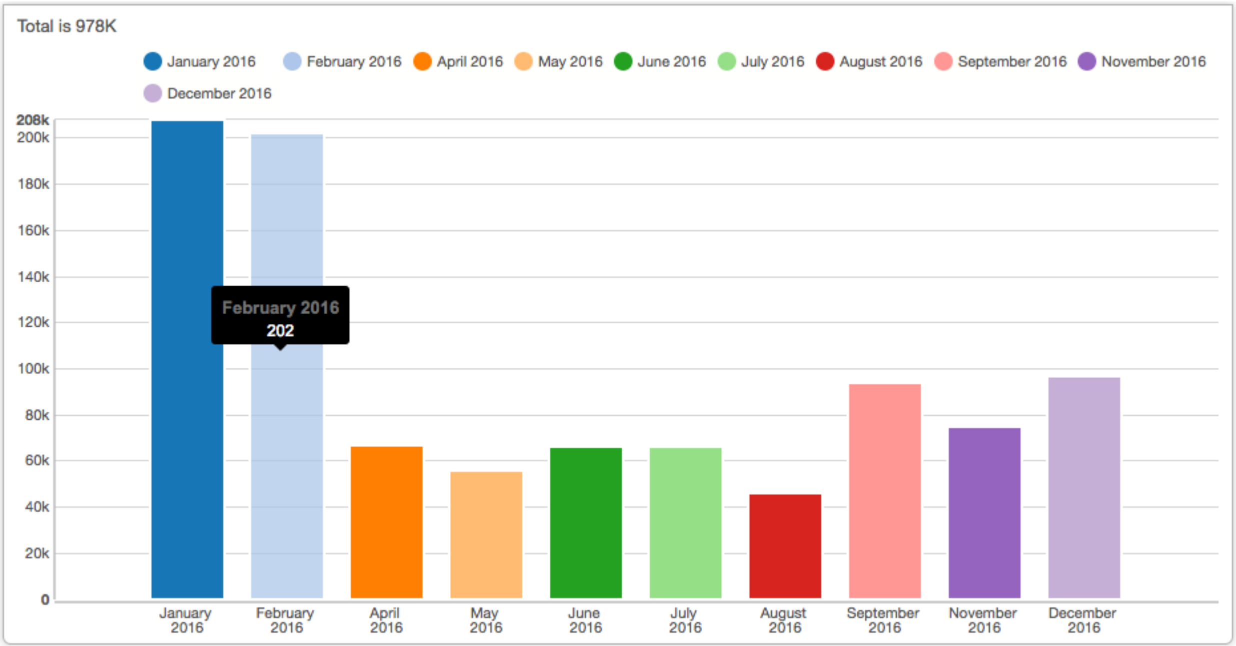
1. Follow Steps 1-5 of the Summation Report section and complete the report criteria as follows:
    - **Report Type**: Select "Summation Report with Details"
    - **Target Module**: Choose "Opportunities"
    - **Define Filters**: Define the report filters as follows then click "Next":
        - Select "Expected Close Date" from the Available Fields

panel, then choose "Is Between" and select "01/01/2016" and "12/31/2016" from the options appearing to the right of the Expected Close Date filter.
        - Select "Sales Stage" from the Available Fields panel, then choose "Is" and "Closed Won" in the dropdowns appearing to the right of the Sales Stage filter.
    - **Define Group By**: Select "Month: Expected Close Date" from the Available Fields panel then click "Next".
    - **Choose Display Summaries**: Select "SUM: Likely" from the Available Fields panel then click "Next".
        - **Note**: The field(s) selected in the Define Group By step are automatically included in the Choose Display Summaries step.
2. On the Choose Display Columns step, select the fields (e.g., "Opportunity Name", "Expected Close Date", "Likely", "Sales Stage", and "User Name") you would like included on the report from the Available Fields panel then click "Next".
    - Refer to Steps 5-10 of the Rows and Columns Report section for instructions on adding fields as display columns.
    - For more information on selecting display column fields, please refer to the Report Display Columns section.



3. On the Chart Options step, select the type of chart, if any, that you wish to display in the report as well as how the data should be summarized on the chart and then click "Next".
4. On the Report Details step, enter a name for the report and assign it to the

appropriate user and team.
    - **Note**: Select the "Optional Related Modules" box to include all closed won opportunities whether or not they are assigned to a user. For more information regarding this option, please refer to the Optional Related Modules section.
5. After entering the report details, click "Save and Run" to save and generate the report immediately.
    - Click the Preview button to preview the report before saving.
    - Click the Save button to save the report without running it immediately.
    - To view the corresponding chart values, simply hover your mouse over the bar in the report chart.



Collapse All

Month: Expected Close Date = January 2016, SUM: Likely = $208,272.56				
Opportunity Name	Expected Close Date	Opportunity Amount	Sales Stage	User Name
Spindle Broadcast Corp.	01/30/2016	$50,950.00	Closed Won	will
Chandler Logistics Inc	01/27/2016	$51,683.00	Closed Won	chris

Creating a 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 appear on the table along with the 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.

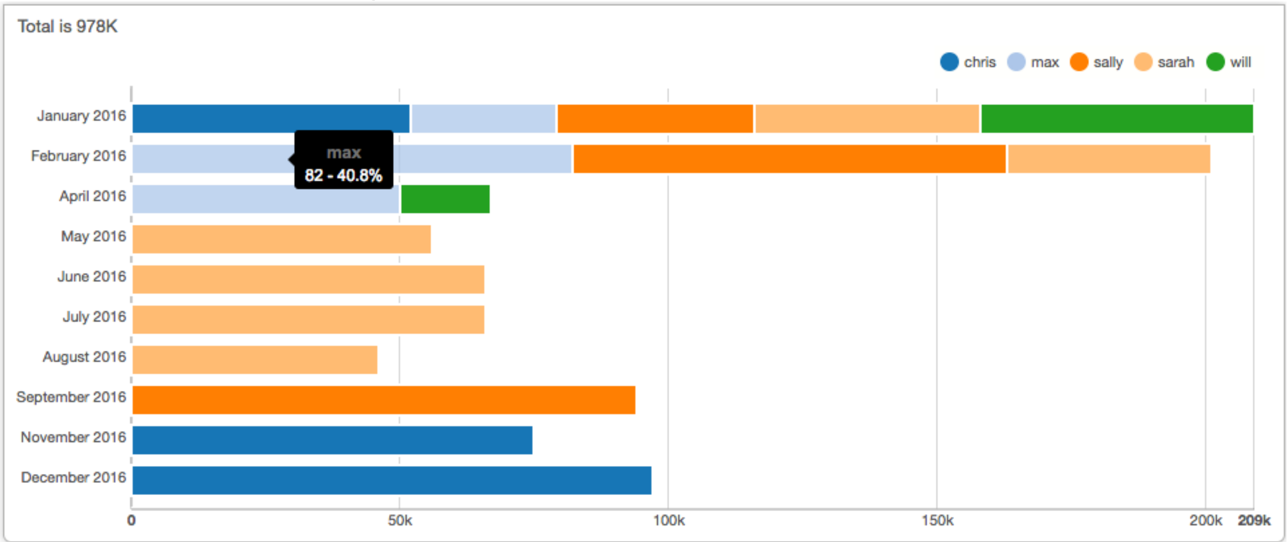
The following steps cover creating a Matrix Report to capture closed won opportunities in 2016 grouped by assigned user and the month it was closed as an example:

1. Follow Steps 1-5 of the Summation Report section and complete the report criteria as follows:
   - **Report Type**: Select "Matrix Report"
   - **Target Module**: Choose "Opportunities"
   - **Define Filters**: Define the report filters as follows then click "Next":
     - Select "Expected Close Date" from the Available Fields panel, then choose "Is Between" and select "01/01/2016" and "12/31/2016" from the options appearing to the right of the Expected Close Date filter.
     - Select "Sales Stage" from the Available Fields panel, then choose "Is" and "Closed Won" in the dropdowns appearing to the right of the Sales Stage filter.
   - **Define Group By**: Select "Month: Expected Close Date" and "User Name" from the Available Fields panel then click "Next"
     Note: You must click the related Assigned to User module to select the User Name field as user names are not direct fields of the Opportunities module.
   - **Choose Display Summaries**: Select "SUM: Likely" from the Available Fields panel then click "Next"
     Note: The field(s) selected in the Define Group By step are automatically included in the Choose Display Summaries step.
2. On the Chart Options step, select the chart type that you wish to display in the report as well as how the data should be summarized on the chart, then click "Next". For more information on setting up the chart options, please refer to the Report Chart Options section.
3. On the Report Details step, enter a name for the report and assign it to the appropriate user and team.
4. Mark the "Optional Related Modules" box to include all closed won opportunities whether or not they are assigned to a user. For more information regarding this option, please refer to the Optional Related Modules section.

- **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 to be displayed on the report grid.

5. After entering the report details, click "Save and Run" to save and generate the report immediately.
    - Click the Preview button to preview the report before saving.
    - Click the Save button to save the report without running it immediately.

When viewing the report's chart, hover your mouse over the bar in the report chart to se the corresponding chart values.



SUM: Likely

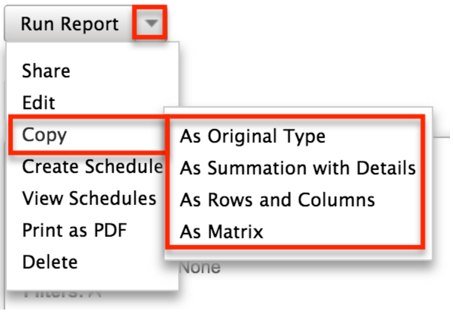
Month: Expected Close Date	User Name					Grand Total
	chris	max	sally	sarah	will	
January 2016	$51,683.00	$27,472.00	$36,522.00	$41,645.56	$50,950.00	$208,272.56
February 2016		$82,423.33	$80,942.22	$38,284.00		$201,649.55

Creating Reports via Duplication

You can also create a new report by duplicating an existing report in Sugar. The Copy option is useful if the report you are creating has similar information to an existing report. You can also copy a report if you would like to view the same or similar data as a different report type. This option is presented when the user clicks "Copy" from the report's Actions menu.

Note: If any report schedule records have been created and related to the original report, they will not copy over to the new report. For more information on creating report schedule records, please refer to the Scheduling Reports section.

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 "Copy".
3. Choose the report type you would like to create from the Copy-As submenu. To keep the new report's type the same, choose "As Original Type".


4. Go through the Report Wizard to select and enter new data as described in the sections under Report Options. If you selected a report type other than the original type, there may be additional or fewer steps in the Report Wizard to complete and you may need to edit the report to meet the new report type's requirements.
5. In the final step, enter a new name for the report and click "Save and Run".

Report Options

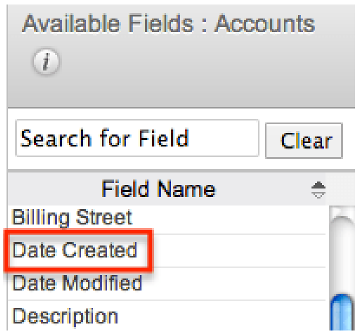
There are various steps involved when creating reports in Sugar and the steps can vary slightly depending on the report type (e.g., Summation report versus Rows and Columns). The following sections provide details concerning the steps involved when creating reports.

Report Filters

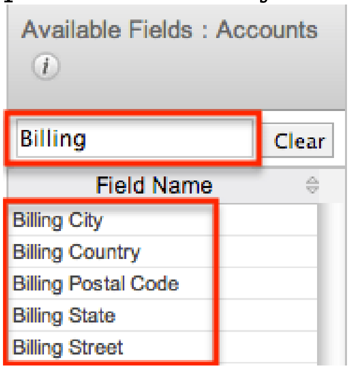
The Define Filters step of the Report Wizard determines which records the report includes or filters out. Filter groups and operators allow for additional levels of complexity as you combine filters to get the precise result set you desire.

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.

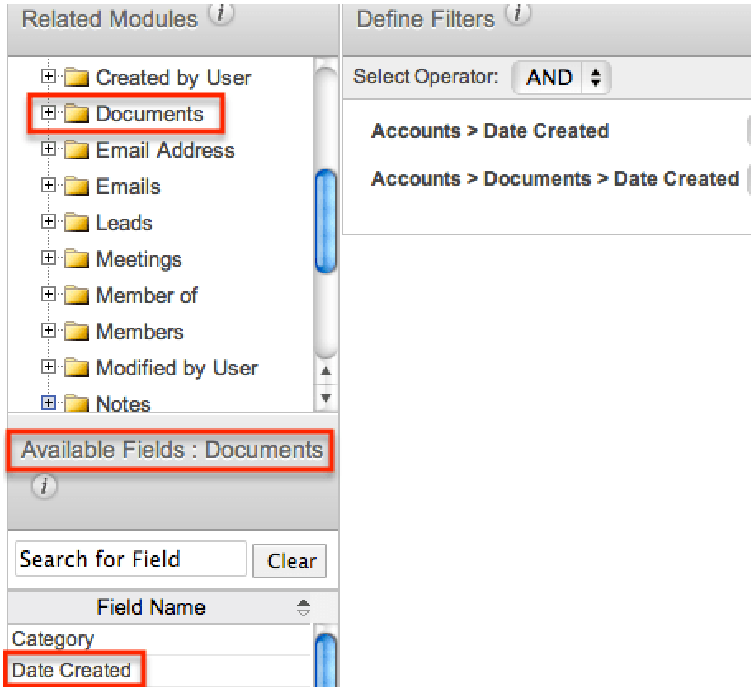


You can also use the search feature above the Available Fields list to easily locate a field. Enter the appropriate keyword (e.g., billing, date) in the search field and the matching results will display in the Available Fields list. Sugar automatically appends the wildcard character (%) to the beginning and end of your search phrase, so the system will return all fields that contain the keyword.

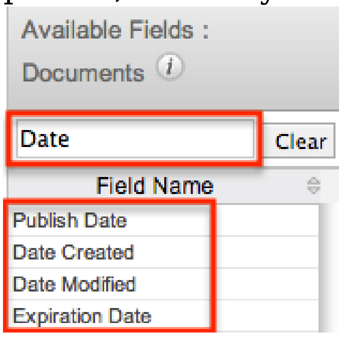


Related Module Filters

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.

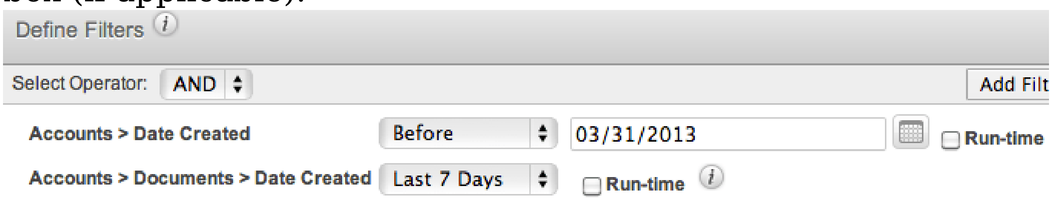


You can also use the search feature above the Available Fields list to easily locate a field. Enter the appropriate keyword (e.g., billing, date) in the search field and the matching results will display in the Available Fields list. Sugar automatically appends the wildcard character (%) to the beginning and end of your search phrase, so the system will return all fields that contain the keyword.

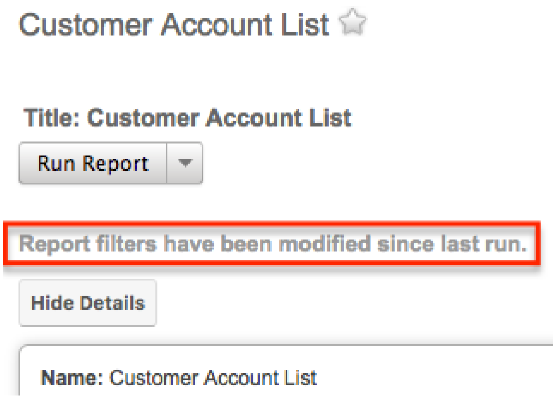


Filter Values

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).

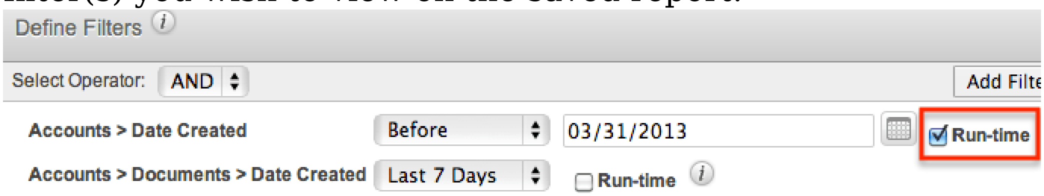


Please note that if the assigned user or a member of your team changes or adds a new filter, the system alerts you that the report filters have been modified since the last run when you save and run the report.

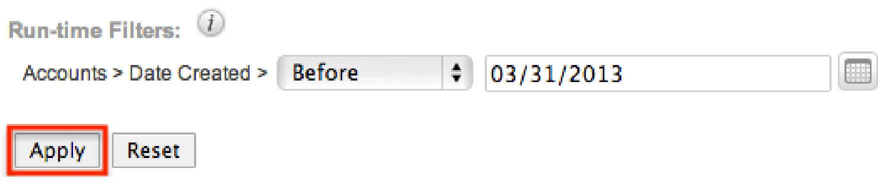


Run-Time Filters

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.



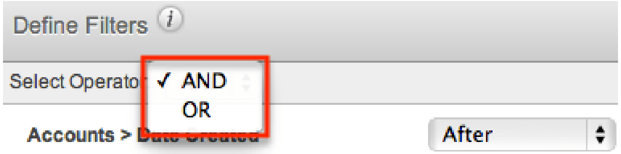
Once the report is created and saved, the run-time filter (e.g., "Accounts > Date Created") will appear on the generated report view. You can change the filter values directly from the report view by selecting the new filter values from the dropdown list and clicking "Apply" or "Run Report" at the top 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.

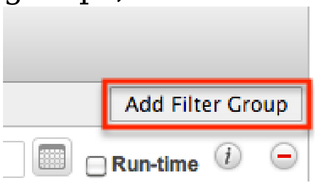
Operators

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 in the report results. The OR operator accepts records matching any of the filters while the AND operator accepts records matching all filters.

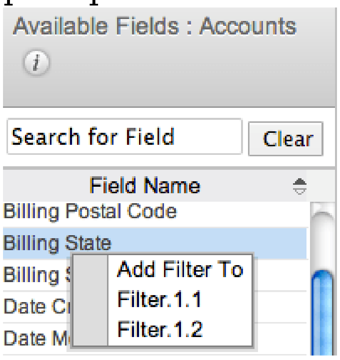


Filter Groups

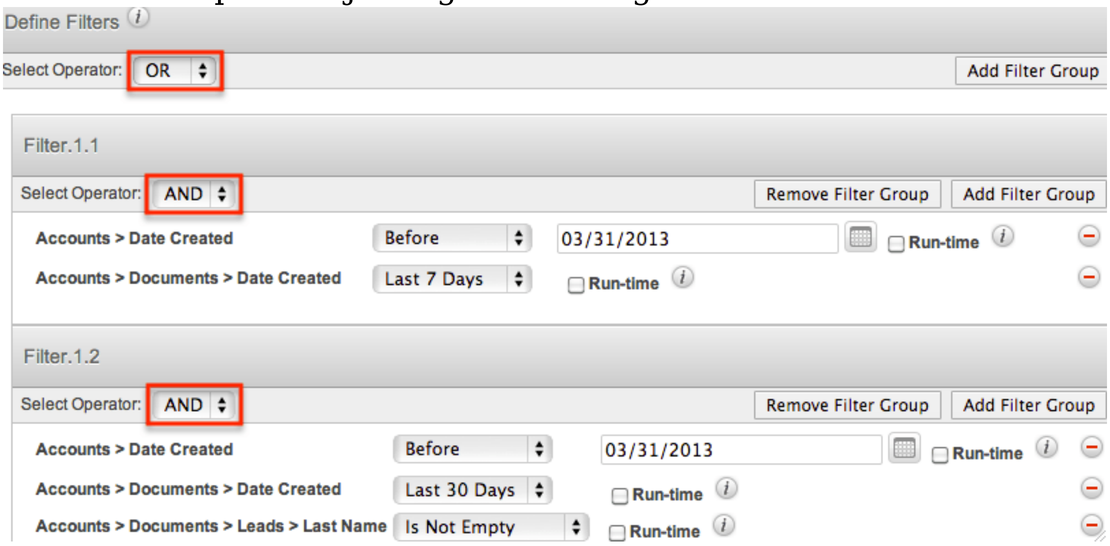
By default, all filters will be added to a single group. To split filters into multiple groups, use the Add Filter Group button.



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.

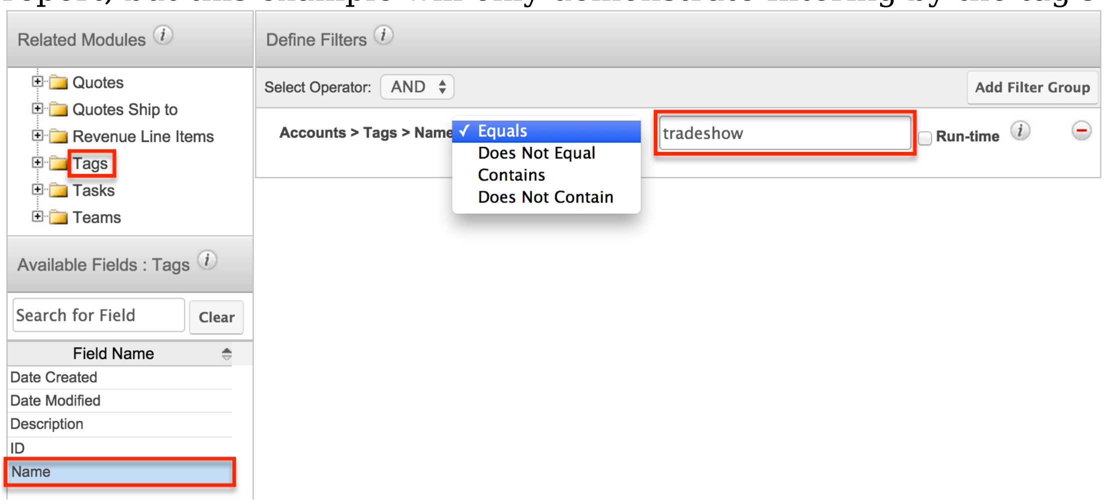


Filter groups and operators can be combined to achieve complex filtering situations. For example, if we need a report for documents belonging to accounts created prior to the first quarter where the document is either new this week or new this month is connected to a lead, we would use the following filter groups with an OR operator joining the two together:



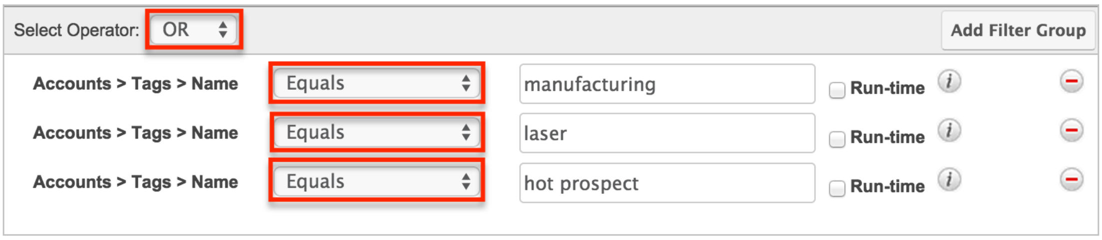
Filters on Tag Fields

If a report's target module contains the Tags field, the report can be filtered by tags via the Related Modules filters. To filter by tags, click on the Tags module name in the Related Modules list. The Available Fields list below will display fields belonging to the Tags module. Select the Name field to create a tag filter. Please note that you can select any field(s) from the Tags module as a filter for your report, but this example will only demonstrate filtering by the tag's name.

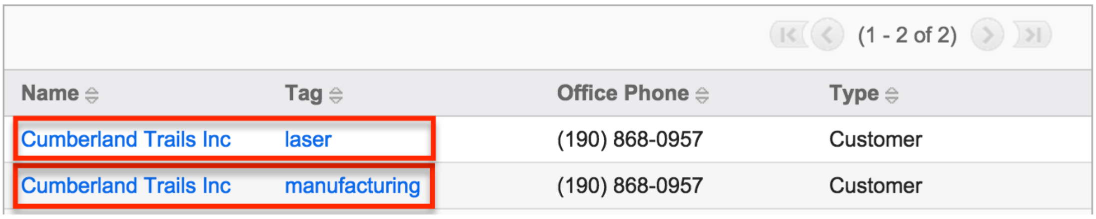


After clicking on the Name field, a line item will appear in the Filters view that allows you to select an operator and specify a tag name in its adjacent text field. This text field is not a type-ahead style like the Tags field is in the Sidecar modules and can only contain a single tag phrase (e.g., tradeshow, hot lead). While the field is case-insensitive, you must know the precise spelling of the tag name that you wish to use as a filter.

To filter a report by more than one tag, click on the Name field again for each additional tag. This will produce additional filter rows where you can specify the appropriate operator and its corresponding tag. In the following example, the report will display a list of account records that are tagged with any one or more of the three specified tags (manufacturing, laser, or hot prospect).



When the Tags field is used as a related-module display column in a [Rows and Columns](#) report or [Summation Report with Details](#), the Tags column will display a separate line item for each tag that a record contains. For example, an account tagged as both "manufacturing" and "laser" will be displayed twice in an Accounts report if the report displays the Tags column. Also, note that the Tag column will only display a single tag even if the record contains multiple tags. This will be the tag that matches the filter criteria.



Please note that clicking on a hyperlinked tag name from report results will take you to the tag's record view. For more information on tags in Sugar, please refer to the [Tags](#) documentation.

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 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).
This Quarter	Any values within the current quarter defined by the calendar year (e.g., January - March, April - June).

Next Quarter	Any values within the upcoming quarter defined by the calendar year (e.g., January - March, April - June).
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:

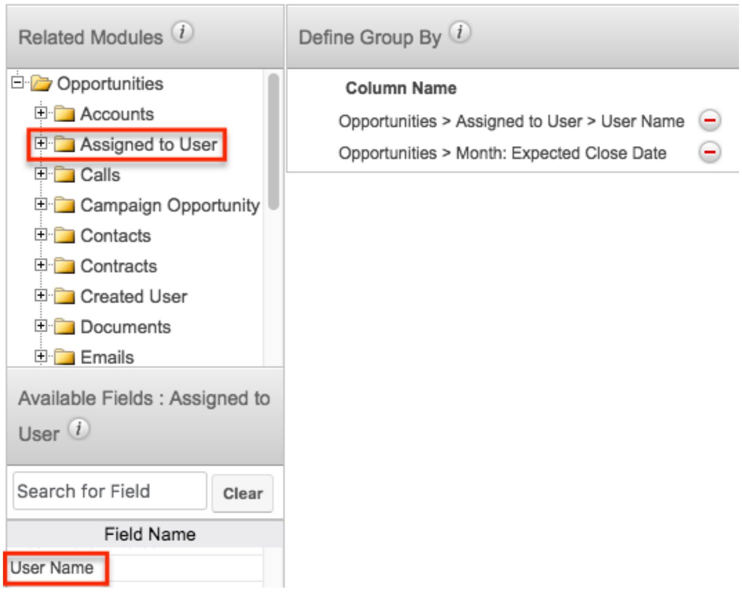
Date Range Filter	**Definition**
Previous Fiscal Year	Any values within the prior fiscal year.
Previous Fiscal Quarter	Any values within the prior quarter defined by the fiscal year.
Current Fiscal Year	Any values within the current fiscal year.
Current Fiscal Quarter	Any values within the current quarter 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 Forecasts 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 would a user on Pacific Standard Time (-8 GMT) because the date ranges are adjusted for the user's time zone.

Group By Fields

Summation Reports and Summation Reports with Details allow you to group records by one or multiple fields within a module. Select a module in the Related Modules pane to display the fields by which you can group. Note that some module fields may not be displayed since only field types that contain set values can be used for grouping (e.g., text fields cannot be used).



Click field names individually to add them to the Define Group By list, or use the Search field to locate specific fields. There is no limit to the number of fields you can include; however, including too many fields may make the report difficult to read. When there are multiple Group By fields, drag and drop field names to reorder this list. The first field in the list determines the Y-axis of a chart and the remaining fields appear as different colors in the chart legend.

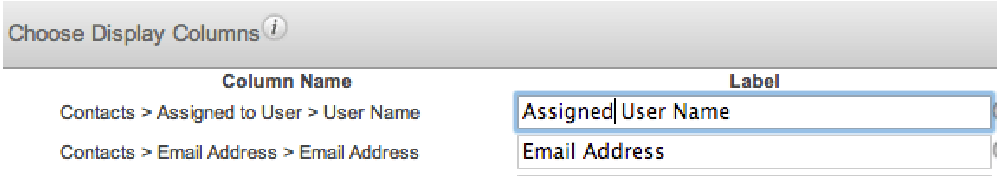
Report Display Columns

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), 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 unnecessary fields from the display column list, simply click the "-" sign to the far right of the displayed field path row.

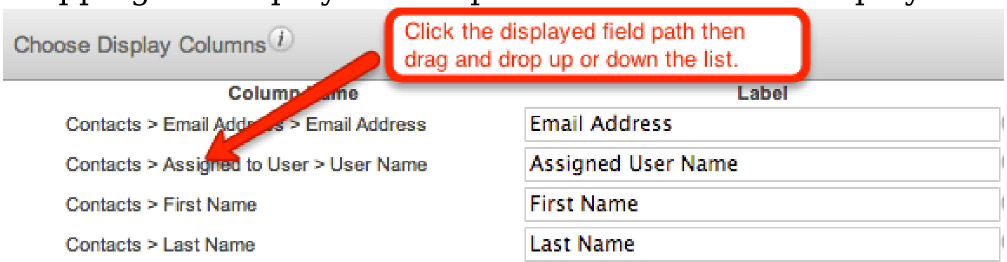
Changing Display Column Labels

By default, the selected display column fields will display stock labels that can be changed if you desire. To change the label, simply enter the new label name in the open text field then click outside of the text box to preserve the change.



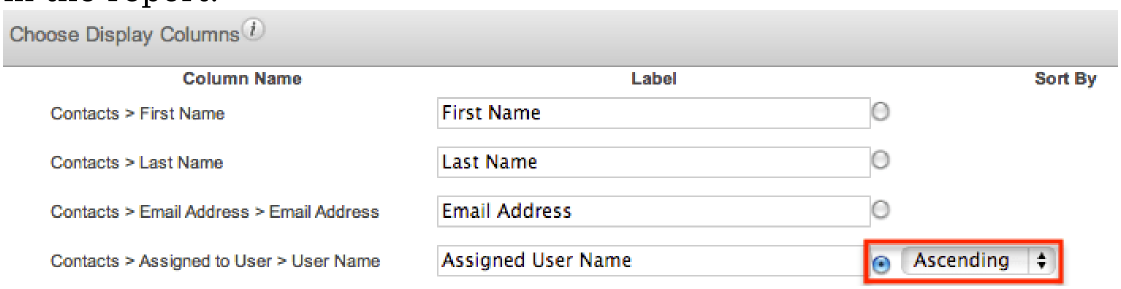
Changing Display Column Order

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.



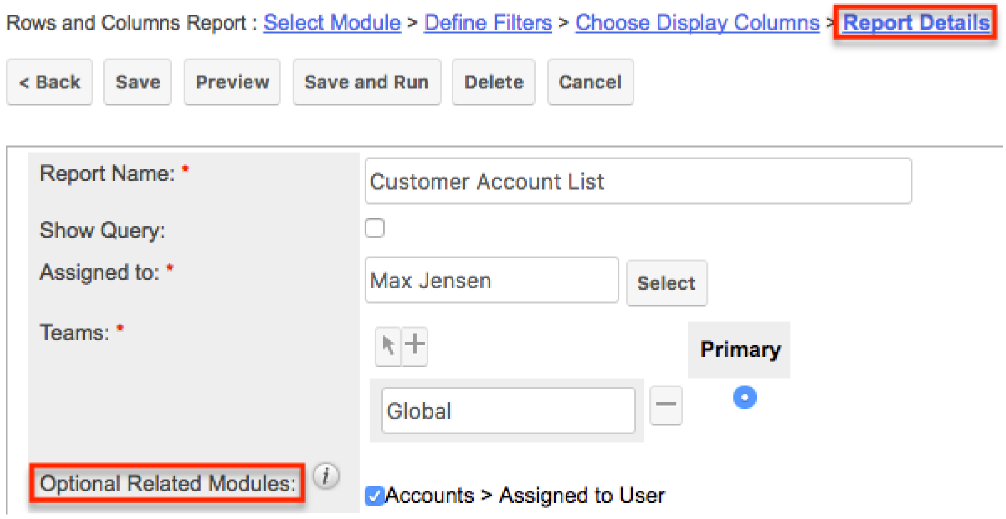
Defining Column Sort

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.

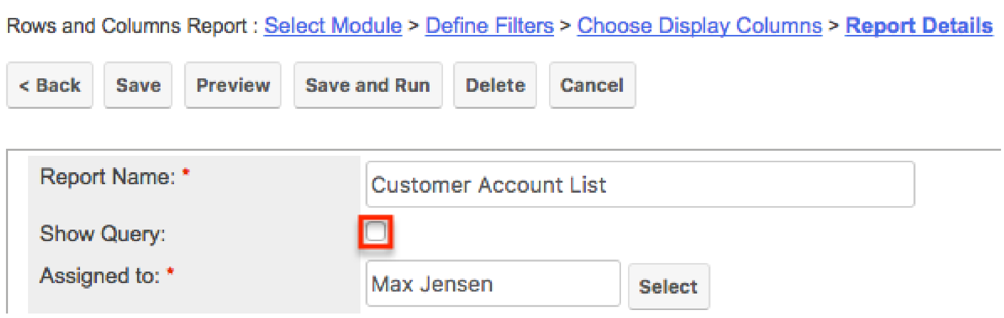


Leaving this box unchecked will exclude all lead records from your report that do not have an email address associated with them.

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. In order to report on records with no related records of a particular module (e.g., Contacts without a related Account) using a filter such as Contacts > Accounts > Name > Is Empty, the Optional Related Modules will also need to be checked.

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.



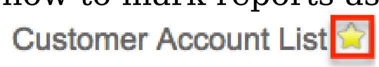
Reports Detail View

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. The detail view's Actions menu appears on the top left of the page and allows you to perform various actions on the current report.

Please note that your access to reports and the displayed results in a report will vary 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.

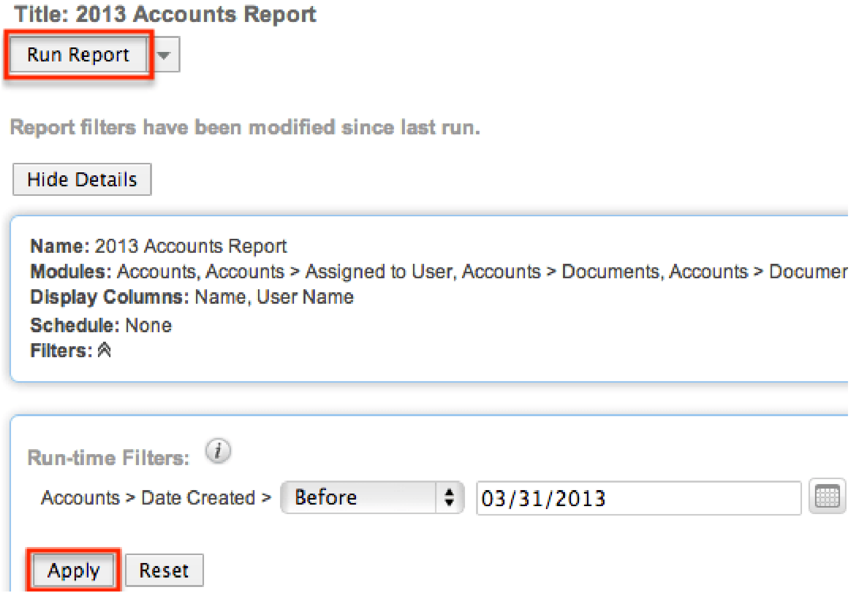
Favorite Designation

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.



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.



Report Details

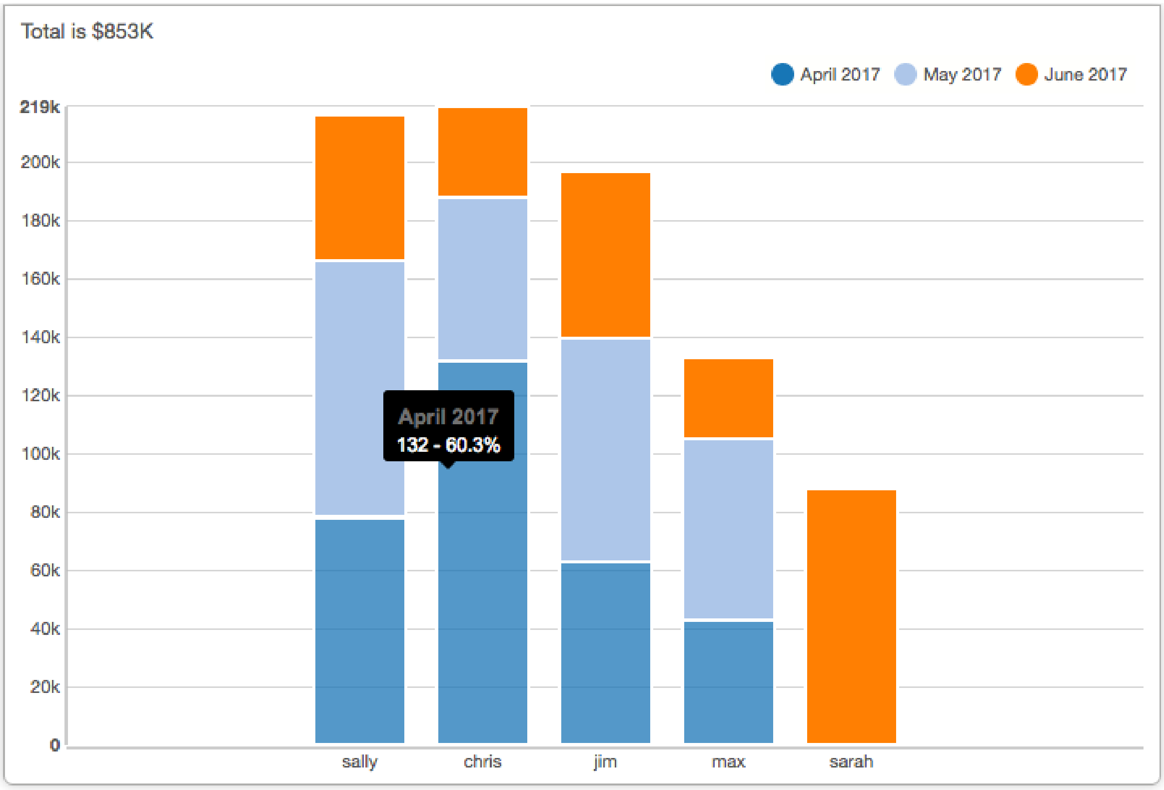
By default, the report details box will appear displaying the report's name, display columns, report type, team(s) assigned to report, etc. To hide the report details, simply click the Hide Details button on the upper left of the report's detail view. Once the report details are hidden, the Show Details 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 which then allows users to drill into each segment to display the associated records. The chart option is available for Summation with Details-type, Summation-type, and Matrix-type reports. You can choose a type of chart for display via the Chart Options step of the Report

Wizard. Please note that at least one group-by and one calculated display summary (e.g., Count, AVG: Likely, SUM: Likely) must be selected in order to be able to display a chart.

The chart is displayed with the report by default and its visibility can be toggled using the Hide/Show Chart button. After running the report, you can hover on a segment of the chart to view the corresponding chart values. Clicking on a segment will open a drawer containing a list of the records making up that segment. For more information, refer to the [Drilling Through Report Charts](#) section below.



User Name	Month: Expected Close Date	SUM: Likely
sally	June 2017	$50,337.00
chris	June 2017	$30,790.00

Note: When you make a chart in the Reports module, there is a limit to the number of groups allowed. The limit is 50 groups for all charts except funnel, for which the limit is 16. The limit only applies to charts. If the number of elements is more than 50 (or 16 for funnel), then an error message is displayed at runtime.

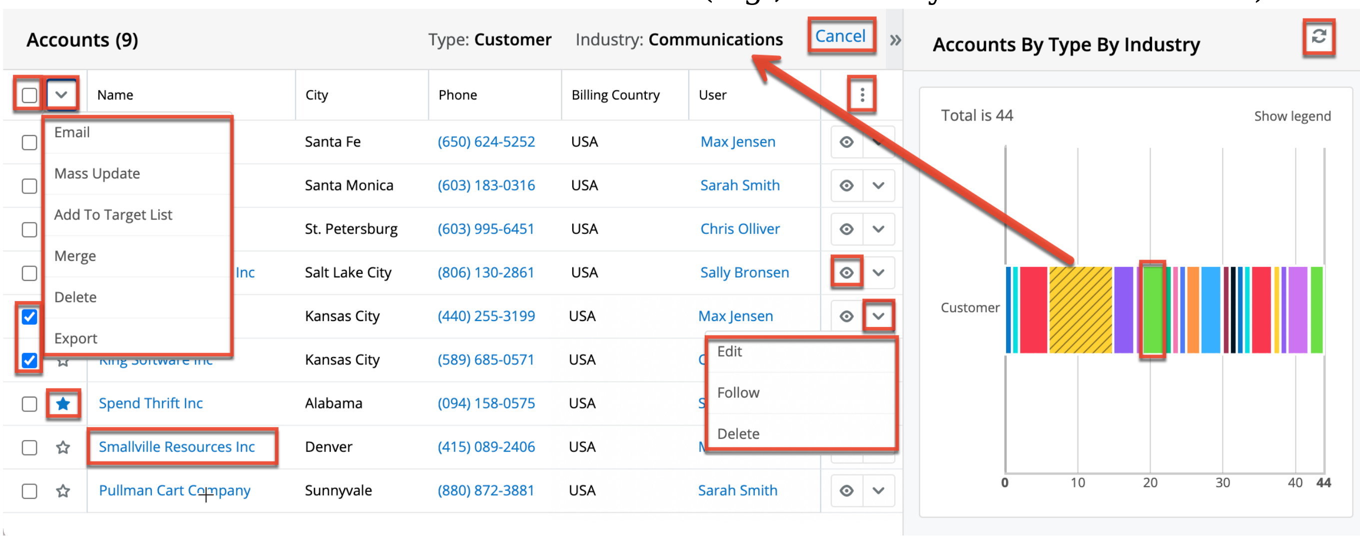
Report charts can also be added and displayed as a Sugar dashlet on your Home page. These Saved Report Chart dashlets also allow for drilling through to access the associated records. For more information on adding report charts as dashlets, refer to the [Home](#) documentation. Please note that at least one group-by and one Display Summary column is required to generate a chart.

Drilling Through Report Charts

In order for drill-through to work for a given report chart, the following conditions must be met:

- When viewing from the Reports module, the report has been run by navigating to the report's detail view, clicking the Run button, or clicking "Save and Run" after editing.
- When viewing from a dashboard, you are viewing a Saved Reports Chart dashlet. Drill-through is not supported for other dashlets containing charts (e.g., Pipeline dashlet).
- The base module of the report is a Sidecar module. For more information, refer to the User Interface documentation.
- The report is not grouped by a DateTime-type field such as Date Created or a Multiselect-type field. Reports grouped by aggregate DateTime-fields (e.g., Month: Date Created) do support drill-through. For more information on field types, refer to the Studio documentation.

Clicking a segment of a report chart will open a drawer containing a filtered list view showing the records belonging to that segment. To the right of the list view is the chart with the currently selected segment highlighted. The segment's applied filter will also be noted above the list view (e.g., "Industry: Communications").



The following operations are available when drilling through a report chart:

- **Select a new segment**: Click a different chart segment to update the list view filters and show the new segment's associated records.
- **Cancel**: Click the Cancel link to close the drawer and return to the previous view.
- **Refresh list and chart**: Click the Refresh button above the report chart to update and reload the filtered list view results and chart.
- Display columns: Click the three-dots menu to the far right of the list view

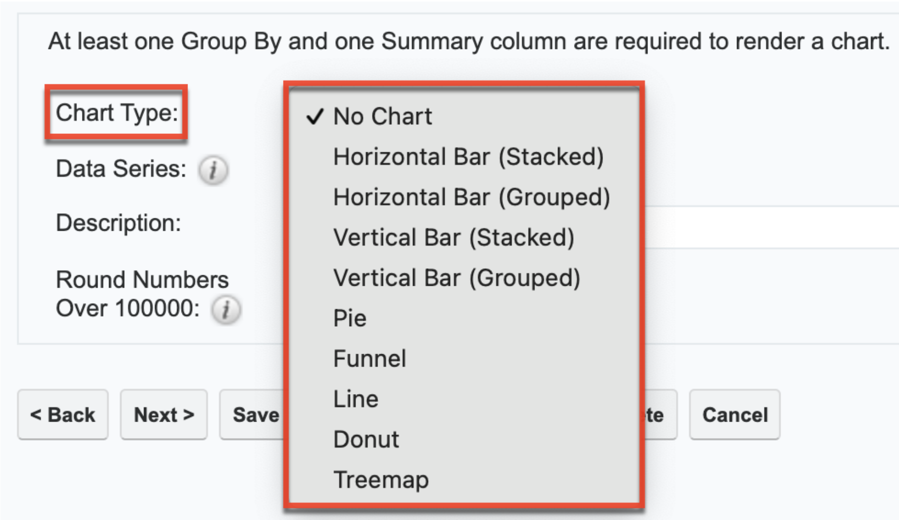
column headers to choose which fields to display.
- **Open records**: Click the name of a record in the list to open it in record view.
- Preview records: Click the Preview button (eye icon) to the right of any row to preview that record. Refer to the User Interface page for information on editing via the record's preview.
- Favorite designation: Click the star on the left of a record's row to toggle it as a favorite. A dark-gray star indicates that the record is a favorite while a white star indicates it is not.
- Record Actions menu: Click the triangle to the right of any row to access the Record Actions menu to edit, follow, or delete specific records from the list view.
- Edit records: Double-click on a row to enable inline editing or use the Edit option from the row's Actions menu.
- Checkbox selection: Mark the checkbox on the left of each record row to select individual records from the list view. Click the checkbox to the left of the Mass Actions menu to select all records displayed on the current set of list view results.
- Mass Actions menu: Click the triangle to the right of the checkbox option to access the Mass Actions menu to perform various actions (e.g., Mass Updates, Delete) on the currently selected records.

Report Chart Options

The Chart Options step of the Report Wizard allows users to choose the chart type that they want to be displayed on the generated report as well as how to summarize the data within the chart. Please note that at least one of the calculated fields (e.g., Count, AVG: Amount, SUM: Amount) 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:

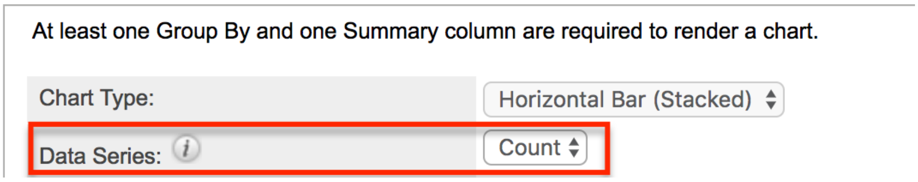
- **Chart Type**: Select the type of chart that you want to display on your report. The available chart types are:



- **No Chart**: The report will not have a chart.
- **Horizontal/Vertical Bar (Stacked)**: Categorical data will be displayed as rectangular bars with heights or lengths proportional to the values that they represent. When a secondary grouping exists, the values will be proportionally stacked within the bars as color blocks.
  - **Note**: For the Saved Reports Chart Dashlet, this chart type can be used by selecting the chart type "[Horizontal/Vertical] Bar Grouped Chart" and leaving "Stack Data Series" disabled in the bar chart display options.
- **Horizontal/Vertical Bar (Grouped)**: Categorical data will be displayed as rectangular bars with heights or lengths proportional to the values that they represent. When a secondary grouping exists, clusters of bars will be proportionally organized within each primary grouping.
  - **Note**: For the Saved Reports Chart Dashlet, this chart type can be used by selecting the chart type "[Horizontal/Vertical] Bar Grouped Chart" and enabling "Stack Data Series" in the bar chart display options.
- **Pie**: Most useful for visualizing numerical proportions, a pie chart will depict data as proportional sections where the sum of all data is 100%.
- **Funnel**: Most useful for visualizing values across multiple stages in a linear process, funnel charts should be used to show values in decreasing order as data points are filtered out at each stage. When visualizing dates, values are sorted in chronological order. When visualizing dropdown values, values are sorted based on the order of the dropdown field. For more information on editing the order of dropdown lists in Studio, please see the Administration Guide.
- **Line**: Line charts are only available when a report has two or more group-by columns. Line charts will comprise a series of data points

connected by line segments and are useful for displaying data trends over time.
    - **Donut**: Donut charts are similar to pie charts but with the center cut out. This chart is most useful for visualizing numerical proportions. The donut chart will depict data as proportional sections where the sum of all data is 100%.
    - **Treemap**: Treemap charts display data as a set of rectangles whose area is proportional to the total area of all rectangles. This treemap chart displays one group-by column and additional group-by columns are ignored.

- **Data Series**: Select the data that you want to be summarized by the chart. The field(s) you selected in the Choose Display Summaries step will be available to choose in this dropdown list.



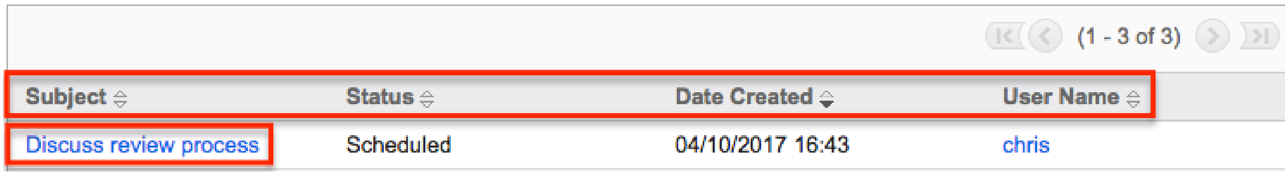
- **Description**: Enter a brief description to label the chart.
- **Round Numbers Over 100000**: Enable this option if you want numbers over 100,000 to be rounded to the nearest thousand in the report charts. For example, 150,000 will be displayed as 150K.

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 display the data in 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 can view a record's details by clicking on the record's 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.



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., Likely) as well as weighted amounts. Each field you select in the Define Group By and Choose Display Summaries steps 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 the month of the expected close date in the report results. 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.

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 will group 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 in either ascending or descending order. To sort by a field or switch the sort direction, click the column header (e.g., Expected Close Date) 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 can also view the record's details 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.

Collapse All

Month: Expected Close Date = January 2016, SUM: Likely = $208,272.56

Opportunity Name	Expected Close Date	Opportunity Amount	Sales Stage
Spindle Broadcast Corp.	01/30/2016	$50,950.00	Closed Won
Chandler Logistics Inc	01/27/2016	$51,683.00	Closed Won
Complete Holding	01/29/2016	$36,522.00	Closed Won
Cumberland Trails Inc	01/29/2016	$41,645.56	Closed Won
Tortoise Corp	01/29/2016	$27,472.00	Closed Won

Month: Expected Close Date = February 2016, SUM: Likely = $201,649.55

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 layouts (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.

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 viewing 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.

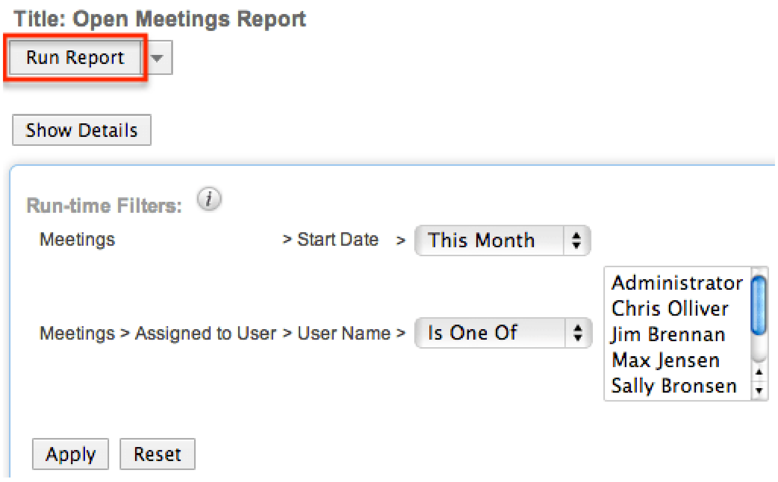
When the user does not have this option selected, reports will display all currency values in the system's default currency. To keep amounts historically accurate, the conversion rate will only update on on currency fields when the business is still open and under the following scenarios:

- The record undergoes a save event (e.g., mass update, manual save) 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 System documentation in the Administration Guide.

Running Reports

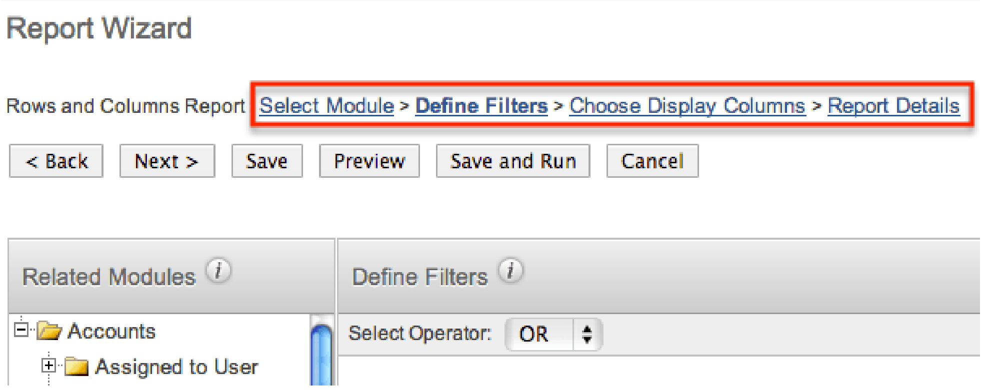
Once the reports are generated and saved in Sugar, you can view the report results at any time. While viewing the report's detail view, there may be times when you need to re-run the report to generate new report results. The Run Report button on the upper left of the report's detail view allows you 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. 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 refine or adjust the report's details or criteria. There are various methods of editing the report from the Reports detail view and Reports list view. Regardless of where you initiate the edit, you will always go through the Report Wizard to make the necessary changes to your report.

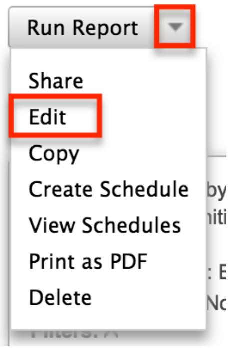
You can edit the report by going through the Report Wizard step-by-step using the Back and Next button or by clicking the step's link (e.g., Define Filters, Choose Display Columns, Choose Display Summaries) in the breadcrumbs at the top of the Report Wizard. When ready, click "Save and Run" to preserve the changes made and generate the report. If any users have created a scheduled report based on the edited report, the changes will automatically be reflected the next time they receive a copy of 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). Once the changes are complete, click "Save and Run" to preserve the changes made and generate the report again.



Deleting Reports

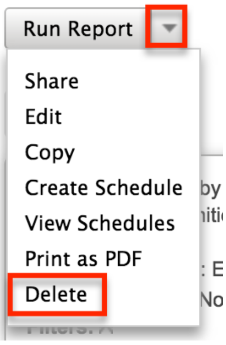
If a report is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Reports detail view or list view. Deleting via the detail view allows you to delete a single report while the list view allows for deleting one or more records at a time. Deleting a report from Sugar will also delete any report schedule records related to the report.

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:

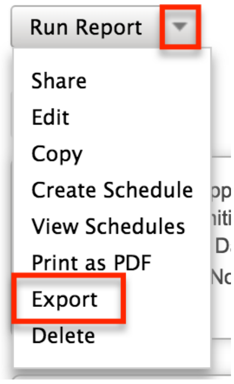
1. Navigate to a report's detail view.
2. Select "Delete" from the Actions menu.



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

Exporting Reports

The Export option allows users to export a report's results as a CSV file. For more information on exporting records in Sugar, please refer to the Export documentation. 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.



Exporting reports is useful when you need to use Sugar data with other software such as Microsoft Excel. You can also use exported report results to update existing Sugar records by creating a report (including Record IDs), 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.

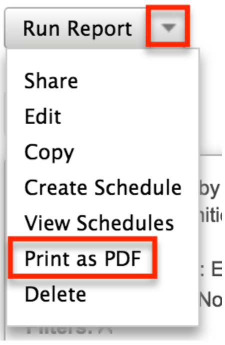
Note: Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a report with a large amount of data. If you encounter an error when performing this action, we recommend breaking up the report into smaller batches.

Printing Reports as PDFs

Sugar's Print as PDF option in the Reports module allows users to download the reports to PDF files onto 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 PDF reports from Sugar may be restricted by a role preventing the export of data. 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 download a copy of a report as a PDF file 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 it to your local machine if you wish.

Scheduling Reports

Users can schedule regular email deliveries of Sugar reports to themselves and other Sugar users via the Reports Schedule module. Scheduled reports will be delivered as PDF or CSV file attachments to the users' primary email addresses in Sugar. When scheduling a report, you can choose the date and time to start sending reports and at what interval you wish to continue receiving them. If you choose to receive the report at a specified time of day, Sugar will output the report and email it to you at that time according to the time zone set in your user profile. If you are configuring the scheduled report for multiple users, then Sugar will convert the time of day to UTC so that each user receives the report simultaneously regardless of their time zones.

Note: Scheduled reports may arrive after the set time based on the cycle increment set by your administrator for the Run Report Generation Scheduled Tasks scheduler. For more information, please refer to the Report Schedule Requirements section.

Please note that your ability to schedule reports from Sugar may be restricted by your role settings. Check with your system administrator if you do not see the option to schedule a report. Furthermore, delivery to users added to a scheduled report may be prevented by teams or roles. For example, if a user schedules a report for a user who does not have access to the report, then the restricted user will not receive the report. For more information on roles, please refer to the Role Management documentation in the Administration Guide.

Note: Reports that contain charts in Sugar will not have a chart in the PDF or CSV version of the scheduled report.

Report Schedule Requirements

The Report Schedules module requires the following configurations:

- **User email settings**: A personal outgoing email account must be configured by the user scheduling a report. For more information on setting up individual email accounts, please refer to the Emails documentation in the Application Guide.
- **System mail server**: The outgoing mail server for the Sugar system must be configured by an administrator. For more information on setting up the system email settings, please refer to the Email documentation in the Administration Guide.
- **Scheduler activation**: The Run Report Generation Scheduled Tasks scheduler must be activated by an administrator (default is inactive) and configured to run at proper intervals. For 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 interval set in the scheduler. The administrator must change the interval for the scheduler to run at least every hour for the user's report to be delivered hourly. For more information on configuring schedulers, please refer to the Schedulers section of the System documentation.

Report Schedule Fields

The Report Schedules module contains the following fields:

Field	Description

Active	The enabled (Active = true) or disabled (Active = false) state of the scheduled report event. **Note**: Disabled report schedule records will not send emails.
Assigned to	The Sugar user assigned to the report schedule record. **Note**: The Assigned To user is not always the same user as the recipient of the scheduled report.
Created by	The Sugar user who created the report schedule record.
Date Created	The date and time that the report schedule record was created.
Date Modified	The date and time that the report schedule record was last modified.
Description	A description or other information about the scheduled report event.
File Type(s)	The format of the related Report that will be emailed. You can send the report as a PDF, CSV, or both a PDF and CSV.
Name	A unique and descriptive name for the scheduled report event.
Next Email Scheduled For	The date and time that the next report will be emailed to the recipient(s).
Repeat Type	The interval of time between recurrences.
Report	The related Report that will be emailed as a PDF or CSV file attachment to the recipient(s).
Start Date	The date and time that the first report will be emailed as a PDF or CSV file attachment to the recipient(s).
Teams	The Sugar team(s) with access the scheduled report record (subject to role permissions).

In addition to the Report Schedule fields, the Users subpanel under a report schedule record contains the following User module fields:

Field	**Description**

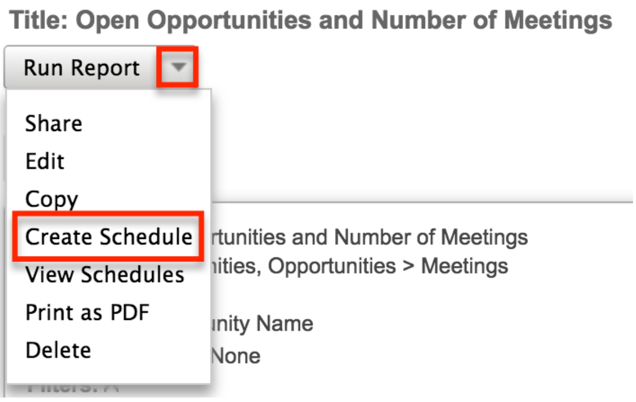
Department	The department where the user works as saved in their user profile.
Full Name	The user's first and last name.
Status	The status of the user's record (e.g., Active or Inactive).
Title	The user's title as saved in their user profile.
User Name	The user's Sugar username.

Please note that the Report Schedule fields and the fields in the Users subpanel cannot be edited via Studio.

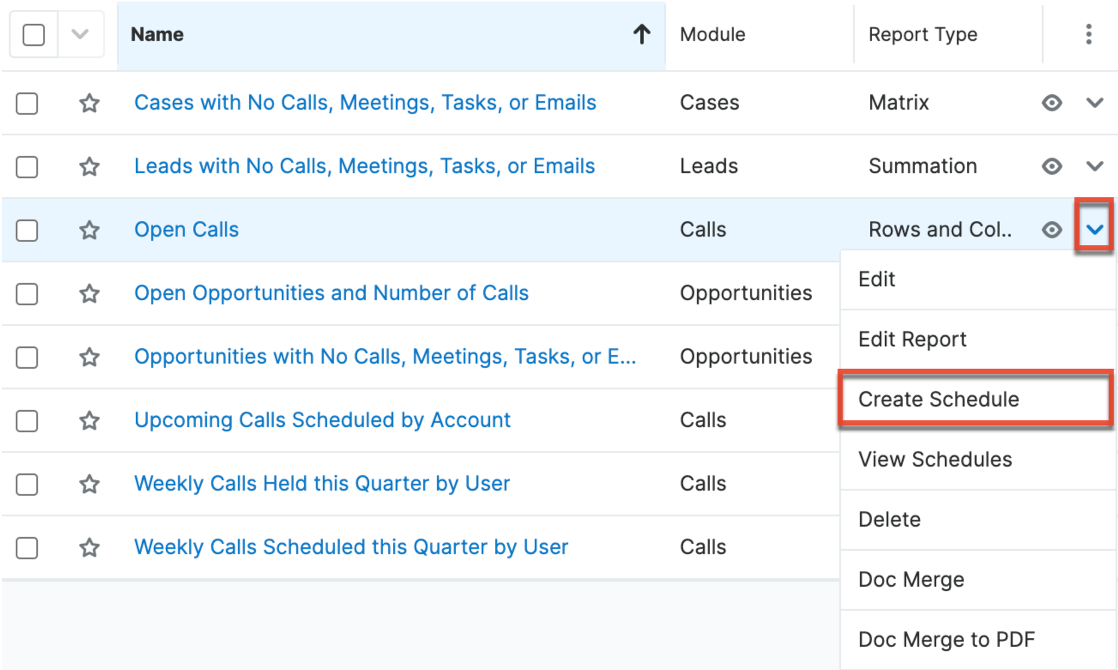
Creating Report Schedules

Use the following steps to schedule an automated report for delivery to your email inbox:

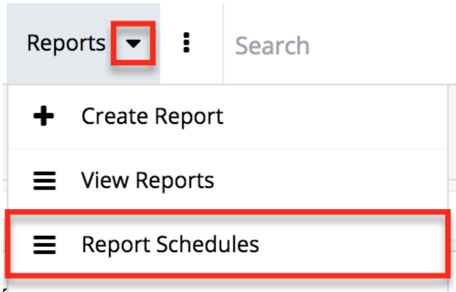
1. Navigate to the Reports module and create a new report schedule via one of the following methods:
    - The actions menu on a report's detail view:



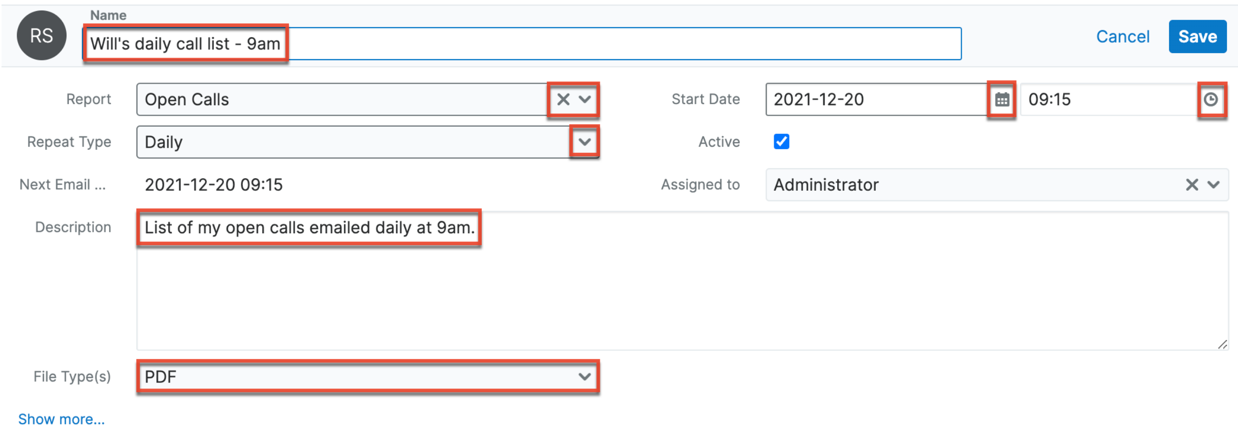
    - The report's actions menu in the Reports list view:



  - Via the Report Schedules module directly:
    - Use the Report Schedules link in the Reports module tab and then click the Create button at the top of the list view:



2. If necessary, use the Search and Select functionality to choose a report in the Report field. This will only be necessary when scheduling a report via the Create button in the Report Schedules module.
3. Give the scheduled event a descriptive name that you can find later. For example, "Will's daily call list - 9am".
4. Complete the Repeat Type and Start Date fields with the frequency of delivery and desired date and time to receive your first emailed report. Optionally, add a description. Choose whether to receive a PDF or CSV report. For more information on the available fields, please refer to the Report Schedule Fields section.



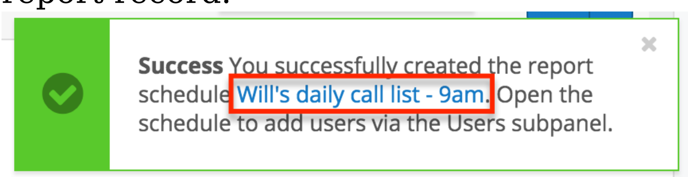
5. Click "Save".

After saving, you can view the report schedule record to edit, disable (i.e., set "Active" to false), or delete the scheduled email as your role permits. If you would like to add more users to the distribution list for the scheduled report, please refer to the Adding Users to Report Schedules section.

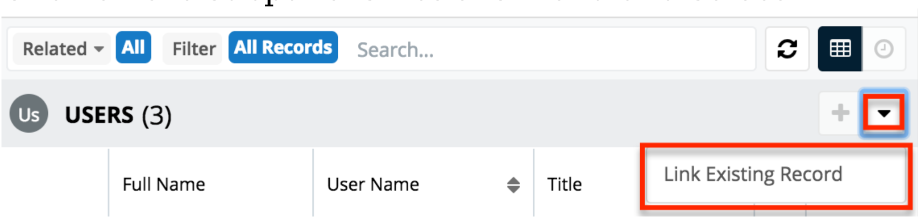
Adding Users to Report Schedules

Use the following steps to schedule an automated report for delivery to the email inboxes of other Sugar users:

1. Follow the steps in the Creating Report Schedules section to create a scheduled report for yourself. If you do not want to receive this scheduled report, you still need to create the record for yourself but can unlink your user record in the following steps.
2. Next, navigate back to the report schedule record by clicking the link in the confirmation message or using the View Schedules option on the related report record.

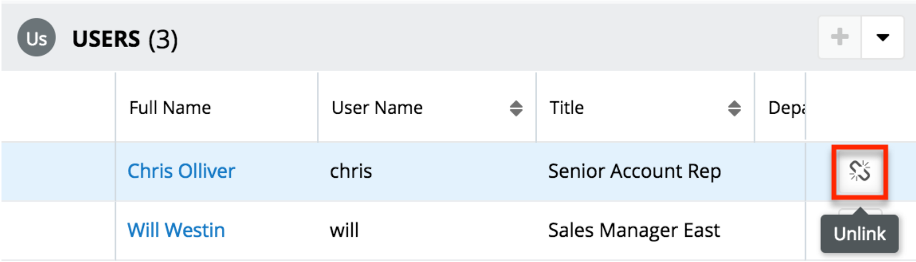


3. On the report schedule's record view, scroll down to the Users subpanel.
4. Click on the subpanel's Actions menu and select "Link Existing Record".



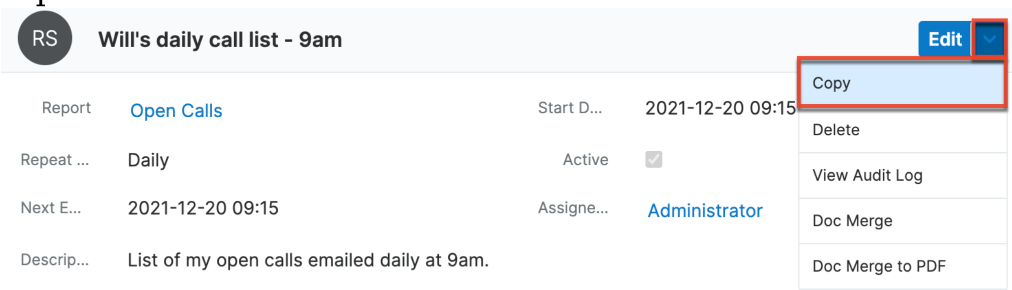
5. Find and select the user or users you would like to add to the scheduled report's distribution list and then click "Add".
6. To remove users from the distribution list, click the Unlink button next to

the user's name in the Users subpanel for the report.

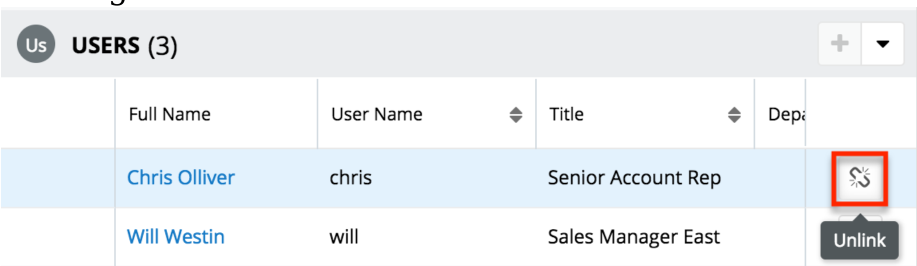


Copying Report Schedules

Users with the appropriate role permissions can schedule new reports via duplication, which will copy the entire user recipient list over to a new report schedule record. Simply select "Copy" from a report schedule record's actions menu. Give the copy a unique name, update the related report field and scheduled times as needed, and save. The related user recipients will copy over to the new report schedule record.

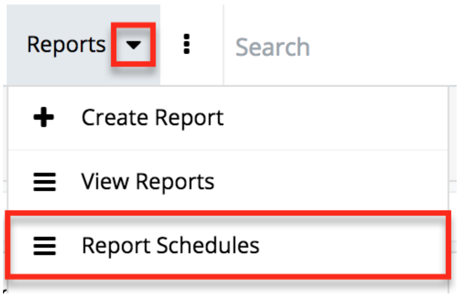


If needed, you can add more users to the distribution list or remove users by clicking the Unlink button next to a user's name in the Users subpanel.

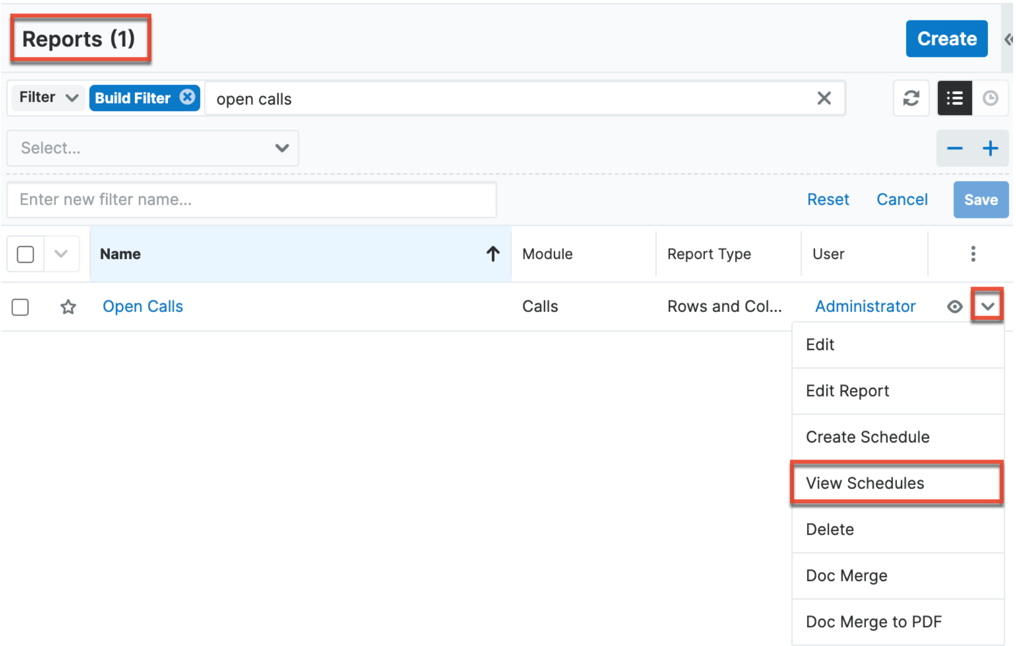


Viewing Report Schedules

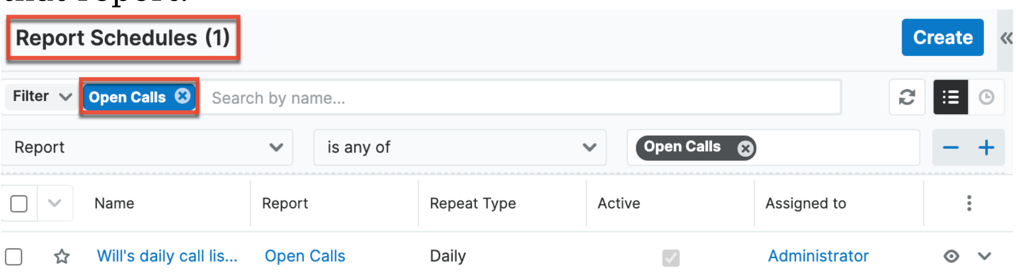
You can navigate directly to the Report Schedules module to access the Report Schedules list view. There is a link to the Report Schedules module in the Reports module tab menu:



In addition, you can view only the scheduled reports related to a given report using the "View Schedules" option on the report's actions menu in list view or detail view.



When using "View Schedules" from a report's actions menu, Sugar will automatically filter the Report Schedules list view to show only records related to that report.



Click on the name of a record to view its details and [edit]() or [add users]() to the report schedule. To disable a report schedule, deselect its Active checkbox and save. For more information on working with list views and editing records in Sugar, please refer to the [User Interface]() documentation.

Favoriting Reports

Users have the option to mark records as favorites via the report's detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Reports module tab.

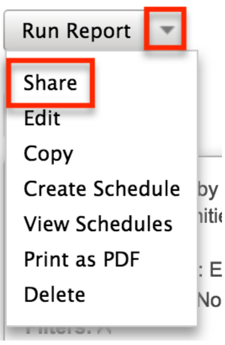
Favoriting via Detail View

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 on 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.

Sharing Reports

Individual reports can be shared with other users in your organization by sending an email containing the record's link directly from the detail view. In the report's detail view, select "Share" from the Actions menu. This will open a Compose Email window that includes the URL of the report in Sugar. Enter the recipient(s) email address in the To field then click "Send".



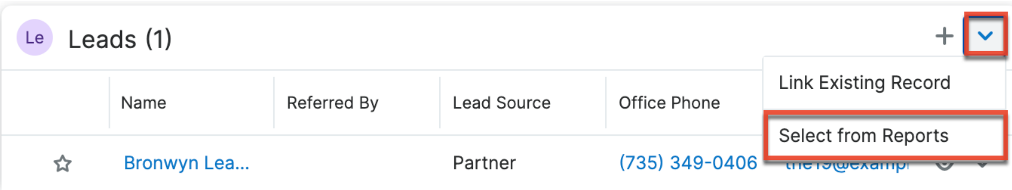
Users can simply click the link in the email to access the report in Sugar. Please note that the user must be logged in to Sugar in order to access the record, and its visibility will depend upon their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration Guide.

Note: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.

Adding Report Results to Target Lists

A target list consists of a group of individuals or organizations you wish to be included or excluded from 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) 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 a target list, you can create a report based on the Leads module filtered by the Primary Address State field (e.g., CA). After saving the report, navigate to the Target Lists module and select the desired target list record you wish to add the report results to. Scroll down to the Leads subpanel, click the Actions menu, and choose "Select from Reports". Select the saved lead report from the Search and Select Reports drawer and all lead records from the report will be added to the target list.



For more information on adding records to target lists, please refer to the Target Lists documentation. Please note that Sugar allows up to 1000 records to be added at a time when adding to a target list. If you desire to add more than 1000 records to a target list, you will need to create the reports in several batches.

Working With Sugar Modules

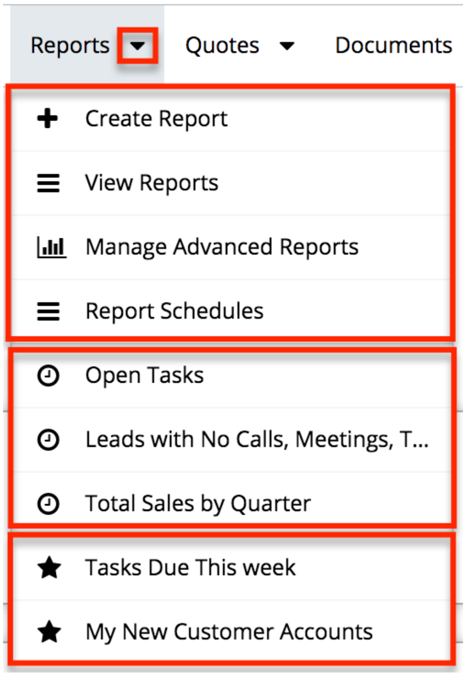
The Reports module uses Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Report Menus

The Reports module contains various options and functionality which are available via menus in the module tab, list view, and detail view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Reports-specific functionality, within this page.

Module Tab Menus

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



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Report	Opens the Report Wizard for creating a new report.
View Reports	Opens the list view layout for searching and displaying reports.
Manage Advanced Reports	Opens the Advanced Reports tab for creating and viewing advanced reports.

Report Schedules	Opens the Report Schedules module for scheduling automated reports via email.

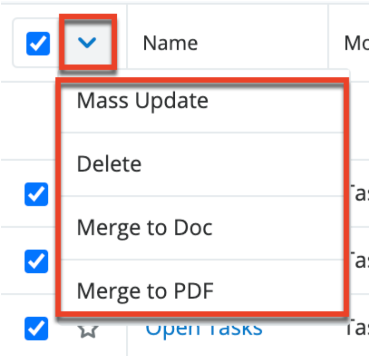
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Reports list view displays all report records and allows for searching and filtering to locate specific reports. You can view the basic details of each record within the field columns of the list view or click a report's name to open the detail view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual report records or click the checkbox in the list header to select all records displayed in the current set of list view results.



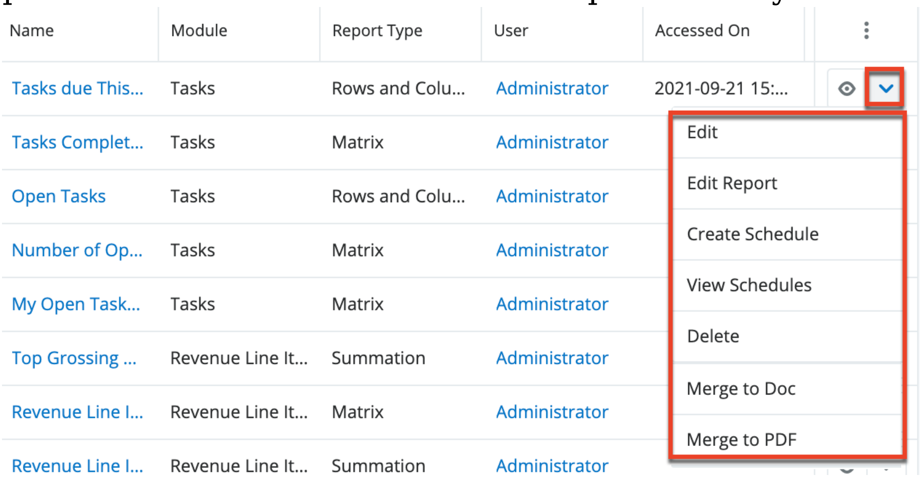
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more reports at a time.
Delete	Delete one or more reports at a time.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge

	widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual report directly from the list view.



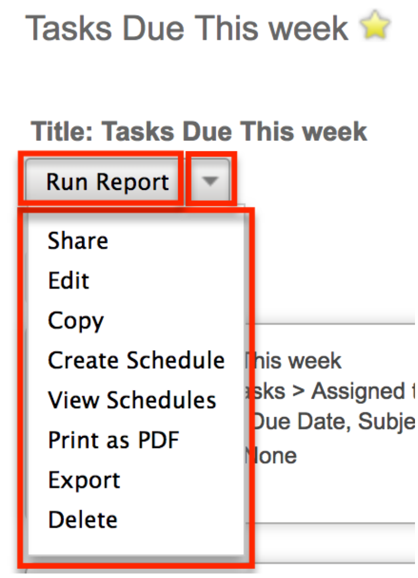
The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (eye icon)	Preview this report in the intelligence pane.
Edit	Inline edit this report.
Edit Report	Edit the report via the Report Wizard.
Create Schedule	Send a copy of this report to your email inbox on a recurring basis.
View Schedules	View any scheduled reports for this report in the Report Schedules list view.
Delete	Delete this report.
Merge to Doc	Select or create a DOCX, XLSX, or PPTX template to merge record data into documents that will be accessible in the Doc Merge widget.

Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Detail View Actions Menu

The Reports detail view displays a single report in full detail including display column fields (if applicable), charts (if applicable), etc. To access a report's detail view, simply click a hyperlinked report name from anywhere within Sugar. The Actions menu appears on the top left of each report's detail view and allows you to perform various operations 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 Actions menu allows you to perform the following operations:

Menu Item	Description
Run Report	Run this report to generate the result.
Share	Share a link to this report via email. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Edit	Edit this report.

Copy	Duplicate this report to create a new report.
Create Schedule	Send a copy of this report to your email inbox on a recurring basis.
View Schedules	View any scheduled reports for this report in the Report Schedules list view.
Print as PDF	Download this report as a PDF file.
Export	Export this report's result to a CSV file.
Delete	Delete this report.

Common Views and Actions

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules.

Content Link	**Description**
Viewing Reports Viewing via List View Viewing via Recently Viewed Viewing via Dashlets Viewing via Preview	The Viewing Records section describes the various methods of viewing report records, including via the Reports list view, the Recently Viewed menu in the Reports module tab, list view dashlets showing report information, and previewing reports in the right-hand side panel.
Searching for Reports List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to list view search, which searches and filters within the Reports module. **Note**: The Report module's Filter option also includes the following filters out-of-the-box: • **Stock Reports**: Filter the list view to show only the reports that were included with Sugar. • **Non-Stock Reports**: Filter the list view to show only user-created reports. • **With Charts**: Filter the list view

	to show only reports that are designed with charts. For more information on stock reports, please refer to the Stock Reports documentation.
Reports List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview Record Actions Menu More Reports Intelligence Pane	The List View section walks through the many elements of the Reports List View layout which contains a filterable list of all report records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Reports list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.
Editing Reports Editing Inline via List View Editing via Preview Mass Editing via List View	The Editing Records section describes the various methods of editing existing report records, including inline via the Reports list view, via the List View preview, and via the Mass Update option on the list view.
Deleting Reports Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted reports, including via an individual record's Actions menu on the Reports list view and the Mass Actions menu on the list view.
Favoriting Reports Favoriting via List View	The Favoriting Records section describes marking reports as favorites via the Reports list view. Favoriting a report allows you to easily access it from list views, dashlets, or the Reports module tab.

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Advanced Reports

Overview

Advanced reports allow users to create custom reports using a single or a combination of SQL statements to directly query your Sugar database. Although the Reports module may be used to create many kinds of reports, users with SQL knowledge may use advanced reports to craft direct database queries for more flexible and extensible reporting.

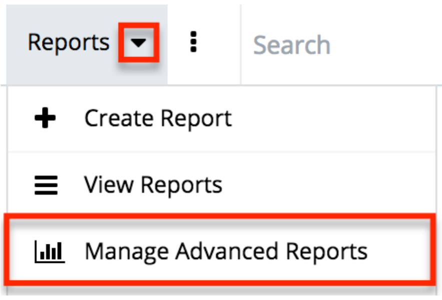
Advanced reports are a combination of three related modules:

- **Custom Queries**: Custom query records contain the SQL statement used to pull information from the database.
- **Data Formats**: Data format records describe how to format and display the results of the related custom query. Data formats may also be interrelated to create child/parent combinations of queries.
- **Advanced Reports**: Advanced report records serve as headers for the report and may display one or more data format. The advanced report record may also be scheduled to be automatically run and emailed to a user.

Note: You must be an administrator in order to create, edit, and delete custom queries, which are required for the full advanced report. Non-admin users can view advanced reports, custom queries, and data formats according to their team access. Admin users wishing to build advanced reports must first be familiar with SQL and Sugar's database structure in order to write the necessary custom queries.

Advanced Reports Module Tab

Advanced Reports may be accessed by navigating to the Reports module which is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access triangle to the right of the Reports tab, then click "Manage Advanced Reports" from the actions menu.



From within the Advanced Reports module, clicking the Advanced Reports tab in the navigation bar will display the list view. Click the triangle to the right of "Advanced Reports" to access the Actions menu. Below the Actions menu is the Recently Viewed menu displays the three advanced reports you have most recently opened.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Advanced Report	Opens the edit view layout to create a new advanced report.
View Advanced Reports	Opens Advanced Reports list view to search and display advanced reports.
Create Custom Query	Opens the edit view layout to create a new custom query.
View Custom Queries	Opens Custom Queries list view to search and display custom queries.
Create Data Format	Opens the edit view layout to create a new data format.
View Data Formats	Opens Data Formats list view to search and display custom queries.
View Reports	Opens the Reports tab to create and view standard reports.

Creating Advanced Reports

Since a single advanced report consists of records from three different modules, the following instructions will step through creating a record within each module and relating those records to generate a report. First, a custom query record will be created, then a data format, and finally an advanced report record. The fields specific to each module are described prior to each set of creation instructions.

Custom Query Fields

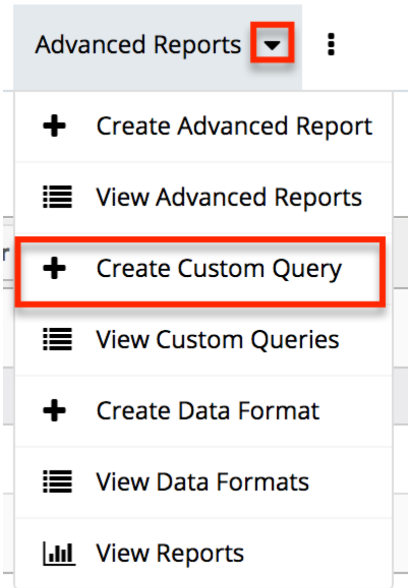
The Custom Query module contains a number of stock fields that come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

Field	Description
Custom Query	The SQL select statement that will retrieve information from the database.
Description	A description or other information about the custom query.
Lock Query	Option to toggle editability of the Custom Query field.
Query Name	The name of the custom query.
Teams	The Sugar team(s) assigned to the custom query record.

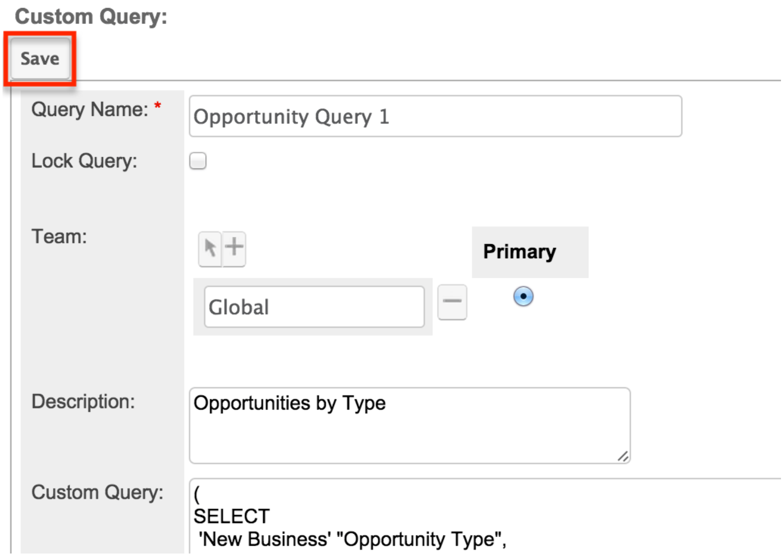
Creating Custom Query Records

Advanced reports enable you to create reports using complex SQL queries that cannot be expressed in standard reports. The SQL query is contained in a custom query record. Each custom query record can be related to multiple data format records which allows it to be reused in multiple reports.

1. Click the triangle in the Advanced Reports module tab to open the actions menu and select "Create Custom Query".



2. Enter appropriate values for the fields in the edit view layout. All required fields will display a red asterisk and must be completed prior to saving. The SQL select statement you wish to run against the database should be input to the Custom Query field
3. Click "Save".



After you click "Save", Sugar will determine whether the SQL statement provided in the Custom Query field is valid. If it is not, Sugar will display an error message and provide an opportunity for you to correct the SQL. The custom query record may not be saved unless the SQL statement is deemed valid by Sugar.

Data Format Fields

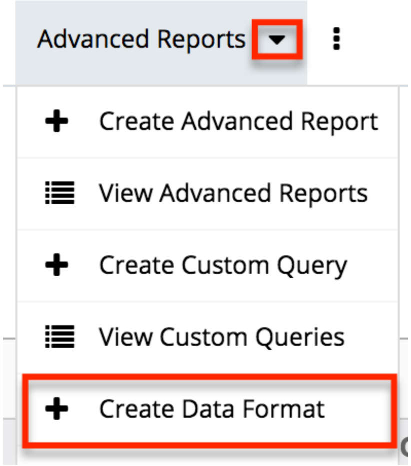
Field	Description
Body Background Color	The color of the background of the data

	cells in the report display.
Body Text Color	The color of the text of the data in the report display.
Combine with Previous Data Format	Specifies whether space should appear between this table and the previous data format's table when a report includes multiple data formats.
Data Format Name	The name of the data format.
Description	A description or other information about the data format.
Exportable (CSV File Only)	Specifies whether this table is available to be exported as a CSV file.
Font Size	The size of the font in the report output.
Group with Previous Header	Specifies whether the column widths should match those of the previous data format's table when a report includes multiple data formats.
Header Background Color	The color of the header background in the report display.
Header Text Color	The color of the header text in the report display.
Parent Data Format	When setting up interlocked queries, the parent data format containing the parent query of your current, child query and data format.
Query Name	The custom query record which will be formatted by this data format.
Report Name	The related advanced report record; this value automatically populates once linked to an advanced report.
Sub/Child Query	When this data format is set as the parent format of a child record, the name of the child query will be automatically populated.
Show Header	Specifies whether a row including column names should appear above data rows in the report display.
Table Width %	The width of the table in the report display as a percentage or pixels.
Teams	The Sugar team(s) assigned to the data

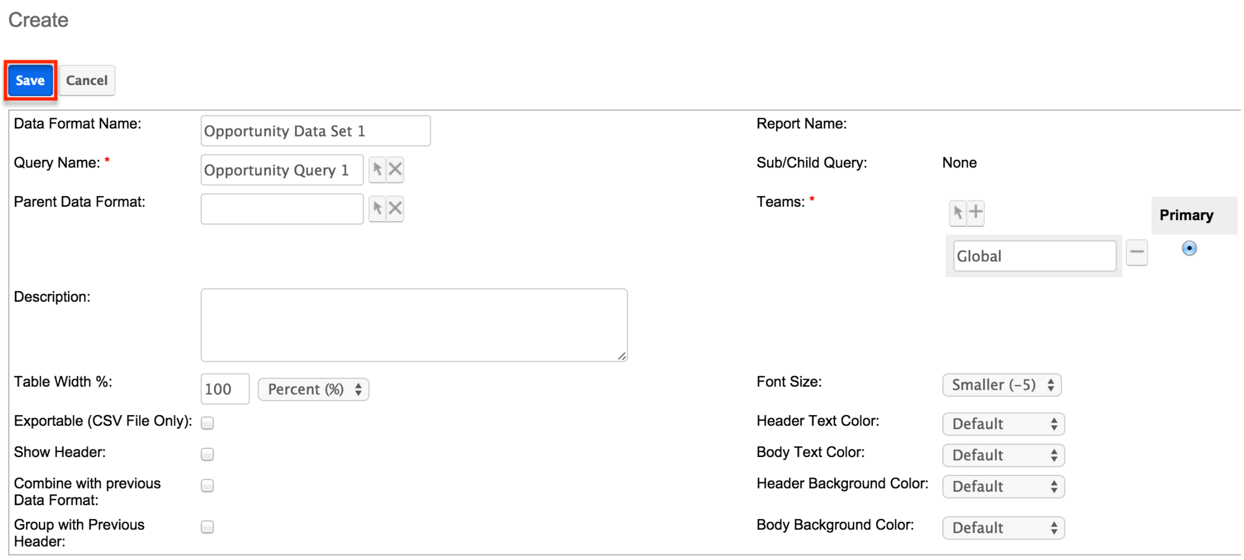
	format record.

Creating Data Format Records

A data format specifies report formatting details such as the text font, text color, and the background color for a particular SQL query contained in a custom query record. You can reference other data formats within a data format. The query contained in the referenced data format is considered to be the sub-query or the child-query. When a data format references another data format, the data formats are interlocked. Interlocked reports are used to produce information from separate queries in a parent-child pattern. For more information, please refer to the Interlocked Reports section of this page.

1. Click the triangle in the Advanced Reports module tab to open the actions menu and select "Create Data Format".


2. Enter appropriate values for the fields in the edit view layout. All required fields will display a red asterisk and must be completed prior to saving. For the Query Name field, type or select the custom query record created in the steps above.
3. Click "Save".



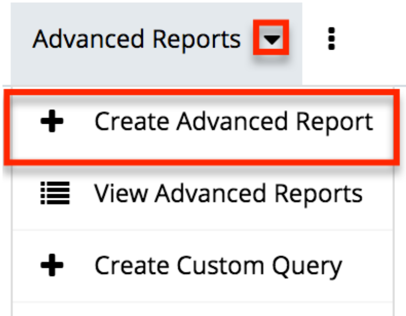
Advanced Report Fields

The Advanced Reports module contains a number of stock fields that 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.

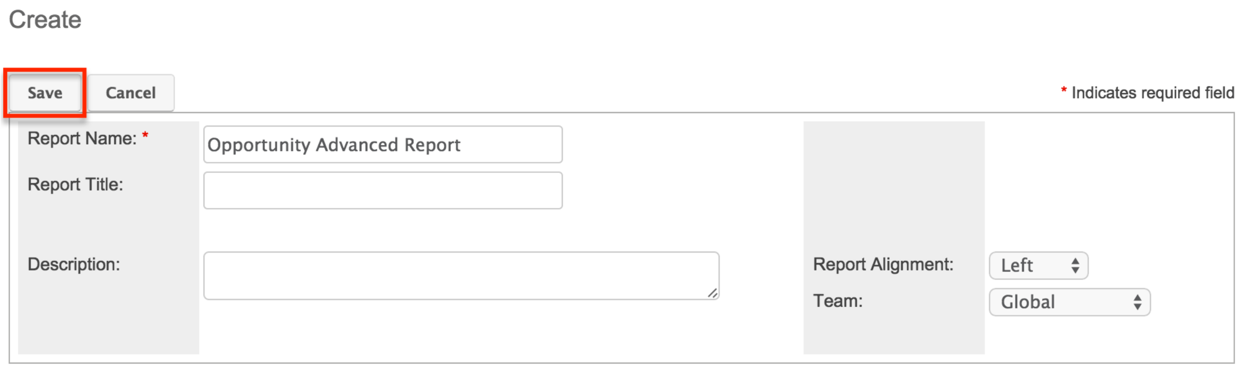
Field	Description
Description	A description or other information about the advanced report.
Report Alignment	The alignment of the advanced report text.
Report Name	The name of the advanced report.
Report Title	The title of the advanced report.
Teams	The Sugar team(s) assigned to the advanced report record.

Creating Advanced Report Records

1. Click the triangle in the Advanced Reports module tab to open the actions menu and select "Create Advanced Report".



2. Enter appropriate values for the fields in the edit view layout. All required fields will display a red asterisk and must be completed prior to saving.
3. Click "Save".



Relating the Advanced Report and Data Format Records

After creating all three types of records as described above, use the following steps to relate the advanced report record to one or more data format records:

1. Click the Advanced Reports module tab to access the Advanced Reports list view.
2. Search for the advanced report record created in the steps above and click the record's name to open it in detail view.
3. Below the advanced report information, click the Select button.
4. Find the data format record created in the steps above and click the record's name to link it to the advanced report.

Running Advanced Reports

Finally, click on "Run Report" and it will return a custom report populated with results from your custom query and displayed with your designated data format.

Aggregating Queries on a Single Report

A single advanced report record may relate to one or more data format records, each of which includes its own query. The bottom of an advanced report detail view displays a list of data formats included in the report. When multiple data formats are included on a single report, their individual tables will be stacked. Two data format fields, "Combine with previous Data Format" and "Group with Previous Header" will affect how multiple data formats are displayed on a single report.

The following actions are available on an advanced report detail view for manipulating its related data formats:

- **Create New**: Create a new data format record which will be automatically related to this advanced report
- **Select**: Select an existing data format record to relate to this advanced report; only data formats which are not already related to a report and do not have a parent data format will be available for selection.
- **Up**: Move a data format's table to a higher position in a report containing several data formats.
- **Down**: Move a data format's table to a lower position in a report containing several data formats.
- **Edit**: Open the data format in edit view in order to make changes
- **Delete**: Remove the data format from this report; the data format record will not be deleted

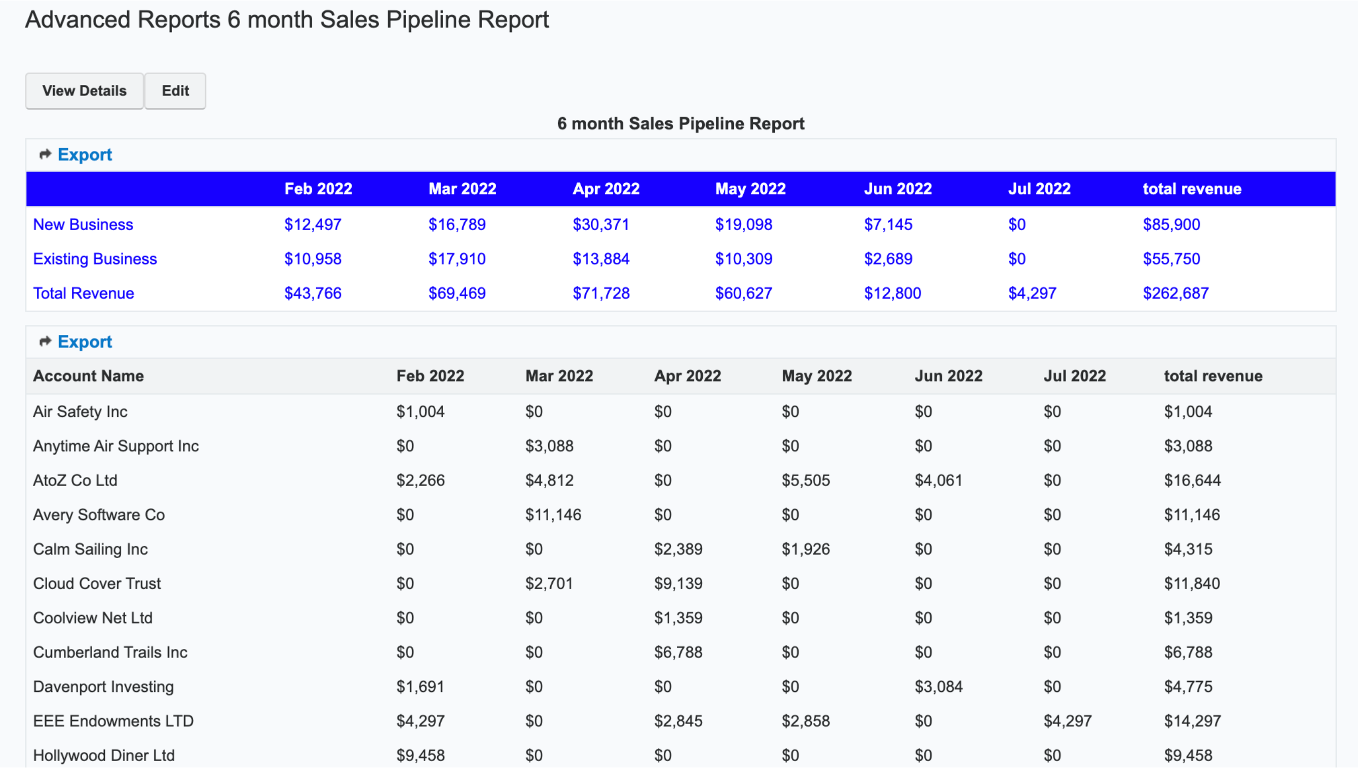
Note: A data format record can only belong to one advanced report. If you wish to use one custom query with several reports, you must create a separate data format record for each report - each of which may relate to the single custom query record. Also, data formats that have a parent data format (as displayed in the Parent Format field) are considered child data formats and may not be directly added to a report. Parent data formats which have child data formats are eligible to be included on a report.

Adding Multiple Data Formats to a Report

For our example, we will add two different data formats to a single report to show the 6-month sales pipeline. First, we want to show the total revenue for opportunities with expected close dates in the next 6 months. We divide the opportunity revenue between new business and existing business and also provide a sub-total of revenue for each month and revenue source (new/existing business). This first query is named "Query Opp Revenue by Business Type" and the first data format is named "Data Set Opp Revenue by Business Type". Data Set Opp Revenue by Business Type has the Query Name field set to "Query Opp Revenue by Business Type".

Second, we want to show the revenue expected for the next 6 months from each account, providing a greater level of detail of our revenue sources. This query lists each account and the revenue expected for opportunities related to those accounts with expected close dates in the coming 6 months and a summation column at the end. This second query is named "Query Opp Revenue by Account" and the second data format is named "Data Set Opp Revenue by Account". Data Set Opp Revenue by Account has the Query Name field set to "Query Opp Revenue by Account".

These two data formats on a single advanced report record produce the following result:



Advanced Reports 6 month Sales Pipeline Report

View Details | Edit

6 month Sales Pipeline Report

Export

	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 2022	Jul 2022	total revenue
New Business	$12,497	$16,789	$30,371	$19,098	$7,145	$0	$85,900
Existing Business	$10,958	$17,910	$13,884	$10,309	$2,689	$0	$55,750
Total Revenue	$43,766	$69,469	$71,728	$60,627	$12,800	$4,297	$262,687

Export

Account Name	Feb 2022	Mar 2022	Apr 2022	May 2022	Jun 2022	Jul 2022	total revenue
Air Safety Inc	$1,004	$0	$0	$0	$0	$0	$1,004
Anytime Air Support Inc	$0	$3,088	$0	$0	$0	$0	$3,088
AtoZ Co Ltd	$2,266	$4,812	$0	$5,505	$4,061	$0	$16,644
Avery Software Co	$0	$11,146	$0	$0	$0	$0	$11,146
Calm Sailing Inc	$0	$0	$2,389	$1,926	$0	$0	$4,315
Cloud Cover Trust	$0	$2,701	$9,139	$0	$0	$0	$11,840
Coolview Net Ltd	$0	$0	$1,359	$0	$0	$0	$1,359
Cumberland Trails Inc	$0	$0	$6,788	$0	$0	$0	$6,788
Davenport Investing	$1,691	$0	$0	$0	$3,084	$0	$4,775
EEE Endowments LTD	$4,297	$0	$2,845	$2,858	$0	$4,297	$14,297
Hollywood Diner Ltd	$9,458	$0	$0	$0	$0	$0	$9,458

Interlocking Parent/Child Queries

Sugar allows you to interlock two queries in a parent/child relationship by relating two data format records. This allows for more complex report results that are displayed in a parent/child format mirroring the queries' relationship. Sugar will first run the parent query, then, for each row of the parent query, it will run the child query.

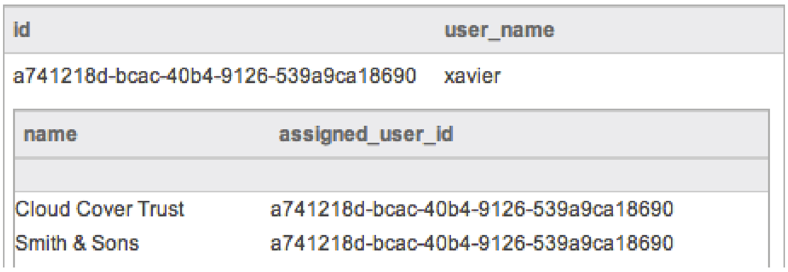
Use the following steps to interlock a pair of simple queries as an example:

1. Create a custom query record called "All Users Query" with the following SQL statement:
   Select id, user_name from users
2. Create a second custom query record called "Accounts By Users Query"

with the following SQL statement:
Select name, assigned_user_id from accounts where assigned_user_id = '{sub}id{sub}'

3. Create a data format record called "All Users Format" with the Query Name field set to "All Users Query".
4. Create a data format record called "Accounts By Users Format" with the Query Name field set to "Accounts By Users Query" and the Parent Data Format field set to "All Users Format".
5. Create an advanced report record.
6. From the advanced report's detail view, use the Select button to choose "All Users Format".
7. Click the Run Report button.

The '{sub}id{sub}' is inserted to the child query to refer to the parent query's current result row. In this example, Sugar will generate a list of user names and id's. Below each user row, a list of accounts assigned to that particular user will appear. The child query is returning assigned_user_id to help make the functionality clear.



id	user_name
a741218d-bcac-40b4-9126-539a9ca18690	xavier

name	assigned_user_id
Cloud Cover Trust	a741218d-bcac-40b4-9126-539a9ca18690
Smith & Sons	a741218d-bcac-40b4-9126-539a9ca18690

Please note that a child data format cannot be run from its own record nor added to an advanced report record. Only by running its parent data format or adding its parent data format to a report will the child query's results be displayed.

Note: Only two data formats may be interlocked at a time. Chains of three or more data format records will cause Sugar not to recognize the queries three or more levels deep.

Column-Level Formatting

Each data format includes formatting options such as color, size, etc which affect the entirety of the custom query's table and header. These options are available while editing the data format record and include these fields. In addition, each column of a query's table may be formatted individually using the options available on the detail view of a data format record. Please note, in order for these options to be available, the related custom query must be returning at least one row.

Formatting a Column's Header

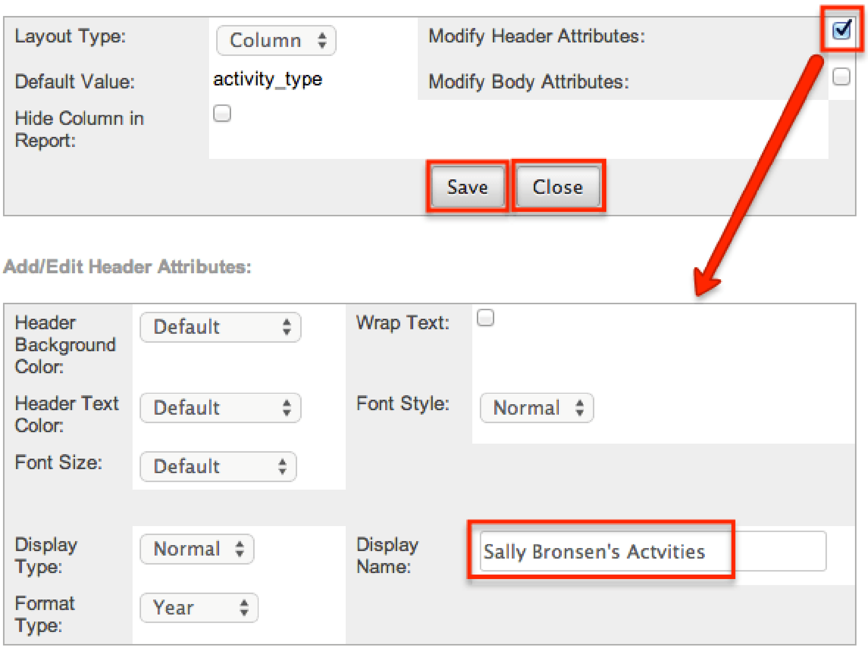
Once you have created a data format record including choosing a custom query record that will return at least one row of data, a table will be displayed at the bottom of the data format record's detail view. The following options are available for formatting a particular column's header:

Field	Description
Display Name	Replaces the text of the column's header which defaults to the column name specified in the custom query's SQL statement.
Display Type	The display type of this column's header text.
Font Size	The size of this column's header text.
Font Style	Specifies if the column's header text should be bolded or italicized.
Format Type	The displayed format (Month, Quarter, Year, etc.) of this column's header text.
Header Background Color	The background color of this column's header.
Header Text Color	The text color of this column's header.
Wrap Text	Specifies if long text in this column's header should wrap to multiple lines.

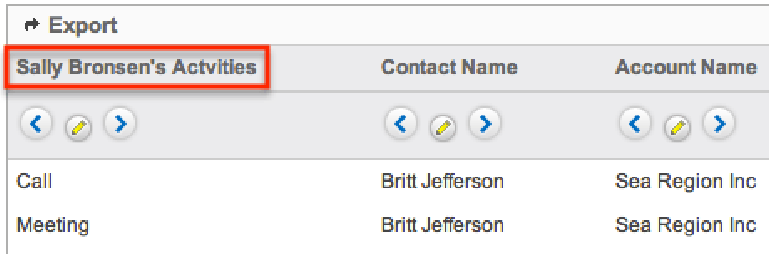
The following steps will walk through modifying the header to display a desired column name rather than the field name shown by default:

1. Navigate to the detail view of a data format record whose custom query is returning at least one row of data.
2. Click the pencil icon above the table column you wish to format.

3. Check the "Modify Header Attributes" checkbox in the pop-up window.
4. Type "Sally Bronsen's Activities" in the Display Name field and make any other desired modifications.
5. Click "Save" then "Close".



After closing the pop-up window, the table will refresh to show the changes you made to the column. For our example, the column name "activity_type" has been replaced with the text "Sally Bronsen's Activities".



Formatting a Column's Body

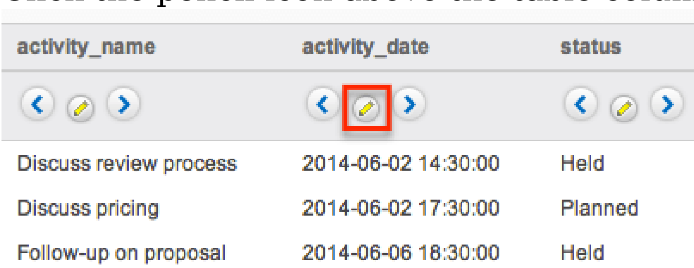
Once you have created a data format record including choosing a custom query record that will return at least one row of data, a table will be displayed at the bottom of the data format record's detail view. The following options are available for formatting a particular column's data cells:

Field	Description
Body Background Color	The background color of this column's data cells.
Body Text Color	The text color of this column's data cells.
Font Size	The size of this column's data cell text.
Font Style	Specifies if this column's data cell text

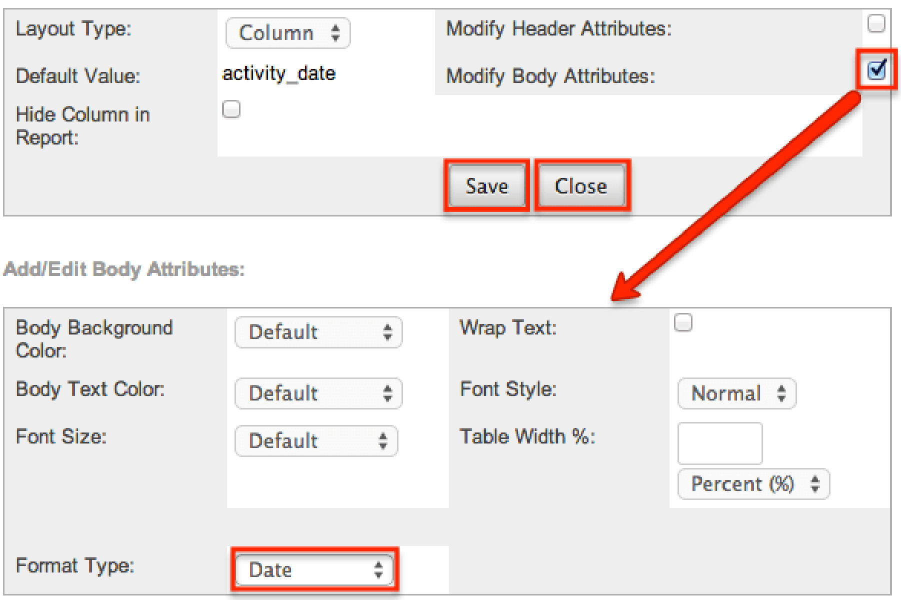
	should be bolded or italicized.
Format Type	Specifies if this column's data cell text should be formatted as plain text, currency, date, or datetime values.
Table Width	The width of this column's data cells and header as a percentage of the table width or as an absolute number of pixels.
Wrap Text	Specifies if long text in this column's data cells should wrap to multiple lines.

The following steps will walk through modifying a column to display a column of datetime data as a simple date value as an example:

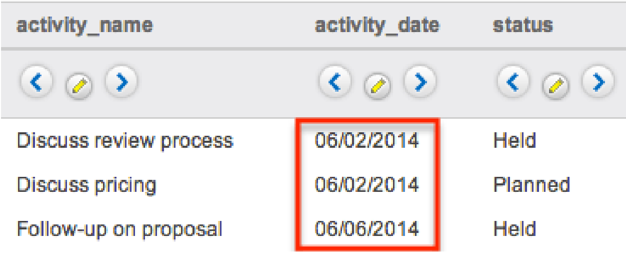
1. Navigate to the detail view of a data format record whose custom query is returning at least one row of data.
2. Click the pencil icon above the table column you wish to format.



3. Check the "Modify Body Attributes" checkbox in the pop-up window.
4. Choose "Date" for the Format Type field and make any other desired modifications.
5. Click "Save" then "Close".



After closing the pop-up window, the table will refresh to show the changes you made to the column. For our example, the column of database datetime values will now be displayed as simple date values.



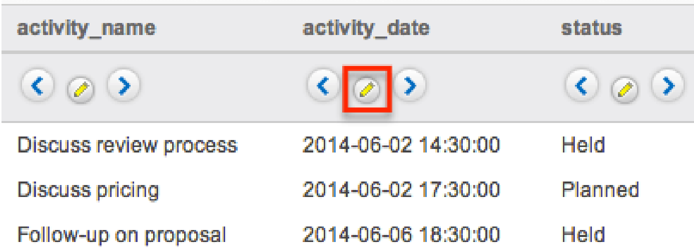
activity_name	activity_date	status
Discuss review process	06/02/2014	Held
Discuss pricing	06/02/2014	Planned
Follow-up on proposal	06/06/2014	Held

Hiding Columns

If an individual column should not be displayed in a report's output, the column may be marked as hidden on the data format record. This will prevent it from being displayed when running an advanced report which includes the data format.

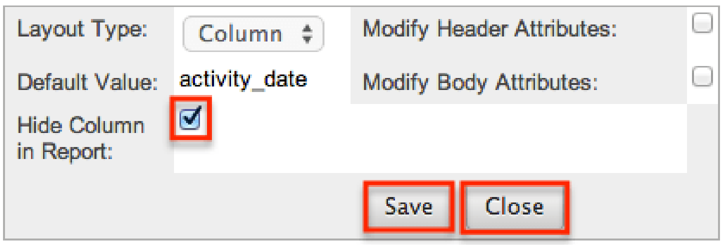
Use the following steps to hide a column from a report's output:

1. Navigate to the detail view of a data format record whose custom query is returning at least one row of data.
2. Click the pencil icon above the table column you wish to format.



activity_name	activity_date	status
Discuss review process	2014-06-02 14:30:00	Held
Discuss pricing	2014-06-02 17:30:00	Planned
Follow-up on proposal	2014-06-06 18:30:00	Held

3. Select the Hide Column in Report checkbox.
4. Click "Save" then "Done".

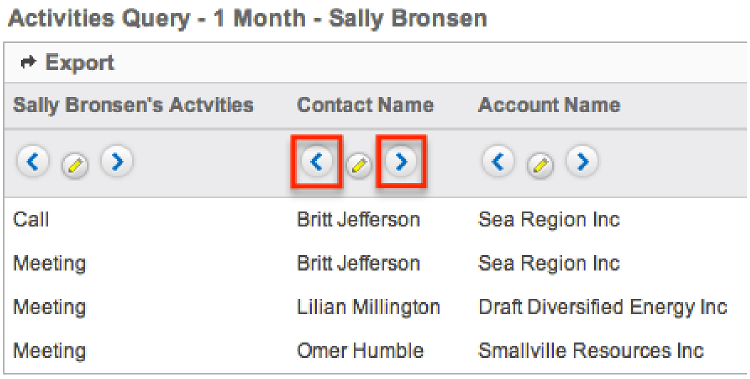


Reordering Columns

The default column order of a table is determined by the SQL statement used in the custom query record. The column order can be changed at the data format record level when a different order is desired on the data format or in the final advanced report record.

Use the following steps to change the column order for a data format record:

1. Navigate to the detail view of a data format record whose custom query is returning at least one row of data.
2. At the top of a column, click the right arrow to move the column one position right. Click the left arrow to move it one position left.



Scheduling Advanced Reports

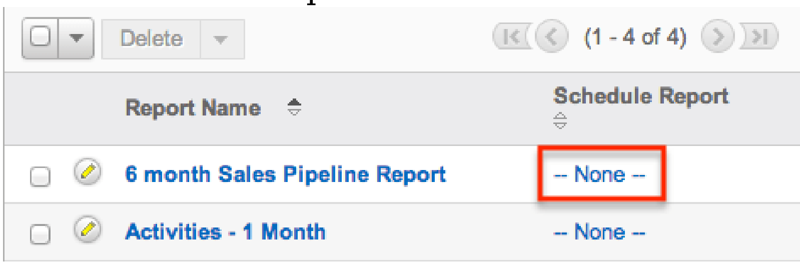
Advanced reports can be scheduled to be emailed to users periodically based on specified date and time intervals. Please note that each individual user has to schedule the report in their Sugar account in order for the reports to be delivered to them. Sugar will run the advanced report at the specified interval based on the set time zone in user preferences and send the data output as a CSV file to the email address associated with your profile.

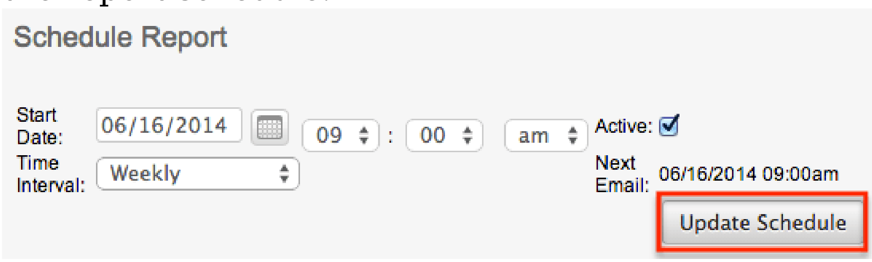
The outbound mail server for the system as well as the user's email settings must be configured properly in order for the reports to be delivered successfully. For more information on setting up the system email settings, please refer to the Email documentation in the Administration Guide. For more information on setting up your user preferences' email settings, please refer to the Getting Started documentation.

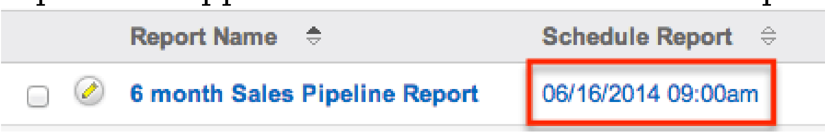
The Run Report Generation Scheduled Tasks scheduler in Sugar processes all scheduled advanced reports to be delivered to the user at the scheduled interval. By default, this report scheduler is set as "Inactive" for new Sugar installations. Administrators must check to make sure that the Run Report Generation Scheduled Tasks scheduler is active and the settings (e.g., interval) are configured properly. For 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 user's 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 List View

Use the following steps to schedule an advanced report via the list view:

1. Navigate to the Advanced Reports list view.
2. Click "-- None --" in the Schedule Report column of the report you wish to schedule. If you wish to update an existing schedule, click the date shown in the Schedule Report column.


3. In the pop-up window, enter the start date/time and select the time interval for report delivery. Check the Active checkbox 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 advanced report.


Exporting Data Formats

Sugar's Export option allows users to download the data in individual data format tables as a .csv (comma-separated values) file. This may be useful when needing to use the report data with other software such as Microsoft Excel. In order for the tables belonging to an advanced report or data format record to be available for export, the data format record's "Exportable (CSV File Only)" field must be checked. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a table with a large amount of data. If you encounter an error when performing this action, we recommend breaking up the queries in smaller batches. For more information on exporting records in Sugar, please refer to the Export documentation. 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.

Exporting Via Advanced Reports

Use the following steps to export a data format table from an advanced report:

1. Open an advanced report record in detail view by selecting it from the Advanced Reports list view or the list of recently viewed reports in the actions menu.
2. Click "Run Report" at the top of the detail view.
3. Click "Export" above the desired table in order to start the download.
   Note: If the "Export" link is not displayed, you must edit the data format record and check "Exportable (CSV File Only)".

Exporting Via Data Formats

Use the following steps to export a data format table from a data format record:

1. Navigate to the detail view of a data format record whose custom query is returning at least one row of data.
2. Click "Export" above the desired table in order to start the download.
   Note: If the "Export" link is not displayed, you must edit the data format record and check "Exportable (CSV File Only)".

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Stock Reports

Overview

Sugar's Reports module comes with a number of pre-built, stock reports. These reports display information from Sugar modules (e.g., Accounts, Contacts, Opportunities, etc.) that will help provide insights into your CRM data. This page lists each of the stock reports that come out-of-the-box with the current version of Sugar and helps explain the type of information provided in each report.

Please note that Sugar ships with over 100 stock reports, which may vary by version. For descriptions of stock reports that shipped with previous versions of Sugar, please refer to the Understanding Legacy Stock Reports article. In addition to stock reports, users can create their own reports. For more information on creating reports, please refer to the Reports documentation.

Viewing Stock Reports

All of Sugar's stock reports can be accessed via the Reports module. From the Reports list view, stock reports can be identified using stock report tags and stock report filters. You may also preview a stock report from list view to read its description and other information from the report's fields. For more information on previewing reports, please refer to the User Interface documentation.

If you do not see the Reports module tab in the navigation bar, please check your user profile to see if the module may be marked as hidden. For more information on hiding and displaying modules, please refer to the Getting Started documentation. If the Reports module is not marked as hidden in your user profile, then check with your administrator to confirm that the module is enabled for your instance. Please note that team and role restrictions also apply to report results and affect what records users can see when they run the reports. For more information on teams and roles, please refer to the Team Management and Role Management documentation.

Stock Report Tags

Stock reports are automatically tagged in Sugar with the "Stock Report" tag. Each report also has a category tag such as "Administrative" or "Sales and Marketing". The reports listed on this page under Stock Reports by Category are organized by the reports' category tags in Sugar. Users can filter the Reports list view by tag as explained in the User Interface documentation.

Stock Report Filters

The Reports list view search provides a filter option that allows users to narrow the list of visible reports. In addition to the default module filters, the following filters are available for the Reports module:

- **Stock Reports**: Filter the list view to show only stock reports.
- **Non-Stock Reports**: Filter the list view to hide all stock reports.
- **With Charts**: Filter the list view to show only reports designed with charts.

Users can further refine the results by typing a search query in the search bar and can create and save their own custom filters. For more information on searching and filtering the list view, please refer to the Search documentation.

Editing Stock Reports

Any user with the proper team and role permissions may edit a stock report as they would edit any other report, but it is not recommended. Instead, we recommend duplicating the report and saving the edited copy with a new name and description. This will preserve the stock report's state as it was made by Sugar. To copy a stock report, simply follow the steps in the Reports documentation to create a report via duplication. For more information on restoring deleted stock reports, please refer to the Restoring Deleted Stock Reports section of this page.

Stock Reports by Category

The reports on this page have been shipped with the current version. For more information on reports that shipped with previous versions but are no longer being shipped in current versions of Sugar, please refer to the Understanding Legacy Stock Reports article.

Administration Reports

The following reports were designed for administrators to gain insight into teams and users, usage patterns, and the performance of their Sugar instance. The reports in this section are tagged "Stock Report" and "Administrative" in the Reports module.

Note: The tracker settings must be enabled via Admin > Trackers before tracker data becomes reportable in Sugar. Please refer to the Understanding Tracker Reports article for in-depth descriptions of each stock tracker report.

Name	**Module**	**Type**	**Chart Type**	**Description**
Active User	Tracker	Rows and		Lists the

Sessions (Last 7 Days)	Sessions	Columns		duration of all user sessions over the last 7 days
Licensed User List	Users	Rows and Columns		Administrators can refer to this report in order to periodically check the number of active users counting against their license and ensure that they are not close to exceeding their limit.
List of Teams and Licensed Users	Teams	Summation with details		Provides the list of teams and the number of users in the team. Group and portal users are excluded from this list.
Modules Used By My Direct Reports (Last 30 Days)	Trackers	Summation	Horizontal Bar	Displays a summary of module usage in the past 30 days for all users who report to the user who is running the report
My Module Usage (Last 30 Days)	Trackers	Summation	Horizontal Bar	Displays a summary of module usage in the last 30

				days for the current user
My Module Usage (Last 7 Days)	Trackers	Summation	Horizontal Bar	Displays a summary of module usage in the last 7 days for the current user
My Module Usage (Today)	Trackers	Summation	Horizontal Bar	Displays a summary of module usage so far today for the current user
My Recently Modified Records (Last 30 Days)	Trackers	Rows and Columns		Lists records assigned to the current user that were saved in the last 30 days
My Records Modified (Last 7 Days)	Trackers	Rows and Columns		Lists records assigned to the current user that were saved in the last 7 days
My Usage Metrics (Last 30 Days)	Tracker Performance	Summation		Shows the total server response time in seconds, total number of database round trips, and total number of files accessed for the user who is running the report in the last 30 days
My Usage Metrics (Last 7 Days)	Tracker Performance	Summation		Shows the total server response time in seconds, total number of

				database round trips, and total number of files accessed for the user who is running the report in the last 7 days
My Usage Metrics (Today)	Tracker Performance	Summation		Shows the total server response time in seconds, total number of database round trips, and total number of files accessed for the user who is running the report so far today
Records Modified By My Direct Reports (Last 30 Days)	Trackers	Rows and Columns		Lists records saved in the last 30 days by users who report to the user who is running the report
Slow Queries	Tracker Queries	Rows and Columns		Lists the details for queries that took longer than the query threshold limit defined in Admin > Trackers
User Sessions Summary (Last 7 Days)	Tracker Sessions	Summation		Summarizes the number of session roundtrips and total active time for each

				user over the last 7 days
Users Usage Metrics (Last 30 Days)	Tracker Performance	Summation		Shows the total server response time in seconds, total number of database round trips, and total number of files accessed for each user in the last 30 days
Users Usage Metrics (Last 7 Days)	Tracker Performance	Summation		Shows the total server response time in seconds, total number of database round trips, and total number of files accessed for each user in the last 7 days

Data Privacy Reports

The following reports will help data privacy managers and marketing users make privacy-related insights and identify leads, contacts, and targets who have opted in to or out of marketing communications. The reports in this section are tagged "Stock Report" and "Data Privacy" in the Reports module.

Name	Module	Type	Chart Type	Description
Count of Contacts by Country	Contacts	Summation		Total count of existing contacts grouped by country.
Count of Leads (unconverted) by Country	Leads	Summation		Total count of existing leads (unconverted) grouped by

				country.
Count of Targets by Country	Targets	Summation		Total count of existing targets grouped by country.
Data privacy activity completed and rejected each month	Data Privacy	Matrix	Vertical Bar	Number of data privacy activities completed or rejected each month. The month is based on date closed.
Data Privacy Activity Due Now	Data Privacy	Summation with details	Horizontal Bar	List of all Data Privacy Activity that is due shortly. Use the run-time filter to adjust the time period.
Data Privacy Activity Overdue	Data Privacy	Summation with details	Horizontal Bar	List of all Data Privacy Activity that are still open and the due date is in the past.
List of Contacts with No Consent	Contacts	Rows and Columns		List of all contacts who have not provided any consent for any business purpose.
List of Emails Opted In	Email Address	Rows and Columns		List of all emails currently opted in.
List of Emails Opted Out	Email Address	Rows and Columns		List of all emails currently opted out.
List of Leads	Leads	Rows and		List of all leads

with no Consent		Columns		who have not provided any consent for any business purpose.
List of Open Data Privacy Activities	Data Privacy	Rows and Columns		A list of all data privacy activities that have a status of open.
List of Open Data Privacy Activities assigned to me	Data Privacy	Rows and Columns		List of open data privacy activity assigned to me
Number of Data Privacy Activity created each month by type	Data Privacy	Matrix	Vertical Bar	Number of data privacy activity created each month by activity type
Open Data Privacy Activities by Type	Data Privacy	Summation with details	Horizontal Bar	List of all open data privacy activity grouped by activity type
Recently Created Data Privacy Activity	Data Privacy	Rows and Columns		A list of all recently created data privacy activity. The time period can be adjusted in the report using the run-time filters.

Sales and Marketing Reports

The following reports will help sales and marketing professionals manage sales activities and identify key performance indicators (KPIs). The reports in this section are tagged "Stock Report" and "Sales and Marketing" in the Reports module.

Name	Module	Type	Chart Type	Description
Accounts by Assigned to User	Accounts	Summation		Number of accounts for each assigned user. This report helps in making sure that account workload is optimized across the sales team. Use run-time filters to narrow down by type or industry.
Accounts By Type By Industry	Accounts	Summation	Horizontal Bar	Number of accounts summarized by account type and industry
Accounts Created by User by Month	Accounts	Matrix	Vertical Bar	Number of accounts created by month by assigned user during the current year. The time period can be adjusted in the report using the run-time filters.
All Closed Opportunities	Opportunities	Rows and Columns		List of all closed opportunities
All Open Opportunities	Opportunities	Rows and Columns		List of open opportunities
Contacts Created by User by Month	Contacts	Matrix	Vertical Bar	Count of all contacts created this year by each

				assigned user by month. The time period can be adjusted in the report using the run-time filters.
Leads By Lead Source	Leads	Summation	Vertical Bar	Number of leads created by lead source
Leads Converted - Lost by Month	Leads	Matrix	Vertical Bar	Number of leads converted and lost each month. The time period can be adjusted in the report using the run-time filters.
Leads Converted by User	Leads	Summation		This report provides the number of leads converted by each user in the current quarter. The time period can be adjusted in the run-time filter.
Leads Created by Source per Month	Leads	Matrix	Vertical Bar	Leads created each month by source. The time period can be adjusted in the report using the run-time filters.
Leads Created by User per Month	Leads	Matrix	Vertical Bar	Leads created each month by user. The time period can be

				adjusted in the report using the run-time filters.
Leads with No Calls, Meetings, Tasks, or Emails	Leads	Summation		Summary count of leads where no activity has taken place or is scheduled. Those leads are counted that have no calls, meetings or tasks scheduled or completed.
My Customers by Area	Accounts	Rows and Columns		A list of customers in a given area (City or Zip Code). This report only lists accounts that are assigned to the person viewing the report. You can use this report to create a trip plan.
My New Customer Accounts	Accounts	Rows and Columns		List of new customers recently opened and assigned to me.
My Open Leads	Leads	Rows and Columns		List of all leads assigned to me.
My Open Opportunities	Opportunities	Rows and Columns		List of Opportunities assigned to me that are still open and are expected to close this

				month. The time period can be adjusted in the report using the run-time filters.
My Open Tasks by Priority and Status	Tasks	Matrix	Horizontal Bar	My open tasks grouped by priority and status. This report allows one to focus on higher priority tasks that are near completion.
My Pipeline Funnel (Revenue Line Items)	Revenue Line Items	Summation	Funnel	This report shows a funnel chart of the revenue line item pipeline that is assigned to me. Use the run-time filters to include only forecasted revenue line items.
Number of Leads Created by Week	Leads	Summation	Vertical Bar	Number of leads created for each week this year. The time period can be adjusted in the report using the run-time filters.
Number of Open Tasks by Users by Week	Tasks	Matrix		Number of open tasks by each user by week due.
Number of Opportunities Created by	Opportunities	Matrix	Vertical Bar	Summary of the number of all

Team by Month				opportunities created this year grouped by the primary team assigned. This gives a sense of which teams are generating opportunities. The time period can also be adjusted in the run-time filters.
Number of Opportunities created by User by Month	Opportunities	Matrix	Vertical Bar	Summary of the number of all opportunities created this year by each user. This gives a sense of which salespeople are generating opportunities. The time period can also be adjusted in the run-time filters.
Number of Quotes created by Users by Month	Quotes	Matrix	Vertical Bar	Number of quotes created by each user by month. The time period can be adjusted in the report using the run-time filter.
Open Call List	Calls	Rows and Columns		
Open Leads by	Leads	Summation	Horizontal Bar	List of open

User				leads grouped by assigned user.
Open Meetings	Meetings	Rows and Columns		List of Open Meetings
Open Opportunities and Number of Calls	Opportunities	Summation		A list of all open opportunities and the number of calls currently scheduled for each. Use the run-time filters to select only scheduled or held meetings. Select the opportunity status to filter on opportunities that are closed won or lost.
Open Opportunities and Number of Meetings	Opportunities	Summation		A list of all open opportunities and the number of meetings currently scheduled for each. Use the run-time filters to select only scheduled or held meetings. Select the opportunity status to filter on opportunities that are closed won or lost.

Open Opportunities by Expected Close Month	Opportunities	Summation	Vertical Bar	Summary of all open opportunities by expected close month. Details of the opportunities are also listed in this report.
Open Opportunities by Type by Expected Closed Month	Opportunities	Matrix	Vertical Bar	Summary of opportunities by expected close month grouped by type.
Open Opportunities by User by Expected Close Month	Opportunities	Matrix	Vertical Bar	Summary of opportunities for each user by expected close month.
Open Quotes by Stage	Quotes	Summation	Pie	A list of all open quotes summarized by stage.
Open Quotes by Stage by Close Month	Quotes	Matrix	Vertical Bar	Summary of quoted amounts that are open by their expected close month and grouped by stage. This report indicates which quotes to prioritize and close.
Open Quotes by Stage by User	Quotes	Matrix		Summary of quoted amounts that are open for each assigned user grouped by stage. This

				report gives a sense of where the quotes are in terms of stages for each salesperson.
Open Quotes Expiring This Month	Quotes	Rows and Columns		A list of quotes that are expiring this month. The time period can be adjusted in the report using the run-time filter.
Open Tasks	Tasks	Rows and Columns		List of Open Tasks
Opportunities Created by Lead Source by Month	Opportunities	Matrix	Vertical Bar	Monthly summary of all opportunities created this year grouped by lead source. This report gives a sense of which sources are generating most opportunities. You can also toggle between open or closed won opportunities. Use the run-time filter to change the time period.
Opportunities with No Calls, Meetings, Tasks, or Emails	Opportunities	Summation	Horizontal Bar	Summary count of opportunities where no activity has taken place or

				is scheduled. Those opportunities are counted that have no calls, meetings or tasks scheduled or completed.
Pipeline By Team By User	Opportunities	Summation	Horizontal Bar	Summary count of opportunities where no activity has taken place or is scheduled. Those opportunities are counted that have no calls, meetings or tasks scheduled or completed.
Pipeline By Type By Team	Opportunities	Summation	Horizontal Bar	Summarizes the open pipeline by team.
Pipeline by User (Revenue Line Items)	Revenue Line Items	Matrix	Horizontal Bar	Summary of RLI's for each user broken down by their current stage. Use the run-time filters to include only forecasted revenue line items.
Pipeline Funnel (Revenue Line Items)	Revenue Line Items	Summation	Funnel	This report shows a funnel chart of the revenue line item pipeline.

				Use the run-time filters to include only forecasted revenue line items.
Quotes Created by Users by Month	Quotes	Matrix	Vertical Bar	Total quote amount created by each user by month. The time period can be adjusted in the report using the run-time filter.
Quotes Won Lost by Month	Quotes	Matrix	Vertical Bar	Quoted amounts won and lost each month this year. The time period can be adjusted in the report using the run-time filter.
Quotes Won Lost by User	Quotes	Matrix		Quoted amounts won and lost this quarter by each assigned user. The time period can be adjusted in the report using the run-time filter.
Recently Closed Quotes	Quotes	Rows and Columns		A list of all recently closed quotes.
Revenue Line Items by Product	Revenue Line Items	Summation		Summary of all RLIs by product. Use the run-time filters to

				include only forecasted revenue line items. You can also change the time period and the sales stage of the revenue line item.
Revenue Line Items Sold by Type this Quarter	Revenue Line Items	Matrix	Vertical Bar	This report provides a summary of all closed won sales for each quarter this year grouped by the lead source. This provides an indication of which sources of leads are generating sales. The time period can be adjusted on the report using the run-time filter.
Sales per Quarter by Lead Source	Opportunities	Matrix	Vertical Bar	This report provides a summary of all closed won sales for each quarter this year grouped by the lead source. This provides an indication of which sources of leads are generating sales. The time

				period can be adjusted on the report using the run-time filter.
Tasks Completed by Users by Week this Quarter	Tasks	Matrix		Number of tasks completed by each user by week in this quarter. The time period can be adjusted in the report using the run-time filter.
Tasks Due This week	Tasks	Rows and Columns		List of tasks due this week. The time period can be adjusted in the report using the run-time filter.
Top Grossing Products This Year	Revenue Line Items	Summation	Horizontal Bar	Monthly sales of products this year. The time period can be adjusted in the report using the run-time filters.
Top Sales Reps This Quarter	Opportunities	Summation		This report summarizes total sales by each assigned user for the current quarter. The time period can be adjusted in the report using the run-time filters.

Total Sales by Quarter	Opportunities	Matrix	Vertical Bar	This report provides a chart of total sales broken down by type for each quarter of this year. The time period can be adjusted in the report using the run-time filters.
Total Sales by Quarter by User	Opportunities	Matrix	Vertical Bar	This report summarizes total sales by each assigned user for each quarter of this year. This report can be used to compare sales person performance. The time period can be adjusted in the report using the run-time filters.
Upcoming Calls Scheduled by Account	Calls	Summation with details		Number of calls scheduled by account in the coming weeks.
Upcoming Meetings Scheduled by Account	Meetings	Summation with details		Number of meetings scheduled by account in the coming weeks.
Weekly Calls Held This Quarter by	Calls	Matrix	Vertical Bar	Number of calls held by each user by

User				week in this quarter. The time period can be adjusted in the report using the run-time filter.
Weekly Calls Scheduled This Quarter by User	Calls	Matrix	Vertical Bar	Number of calls scheduled by each user by week in this quarter. The time period can be adjusted in the report using the run-time filter.
Weekly Meetings Held This Quarter by User	Meetings	Matrix	Vertical Bar	Number of meetings held by each user by week in this quarter. The time period can be adjusted in the report using the run-time filter.
Weekly Meetings Scheduled This Quarter by User	Meetings	Matrix		Number of meetings scheduled by each user by week.
Wins and Losses by Users this Quarter	Opportunities	Matrix		The total amount of opportunities won vs lost by each assigned user in the current quarter. The time period can be adjusted in the run-time filters.

Restoring Deleted Stock Reports

If a user deletes a stock report, it is marked with a deleted flag in the instance's database. Should you need to recover the deleted report, a person with access to your instance's file system can locate the report in the saved_reports table and change the Deleted field from "1" to "0" for this specific report record. Upon doing so, the report will be restored in your Sugar instance. If the stock report has been deleted from the database and cannot be recovered, you must manually recreate the report from scratch in the Reports module.

To hide one or more stock reports from your users, consider mass updating the team to the Administrator's private team because deleted reports cannot be restored via the user interface.

Note: Customers with instances hosted on Sugar's cloud service do not have direct access to the database and, therefore, cannot restore stock reports once they have been deleted. A support-authorized contact for your organization can file a case with the Sugar Support team for assistance in trying to restore the report that has been deleted from your Sugar instance.

Last Modified: 2021-12-21 14:52:09

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. Please note that the export method varies slightly between modules using the Sidecar user interface (e.g., Accounts, Contacts, Leads, etc.) and Legacy user interface (e.g., Projects).

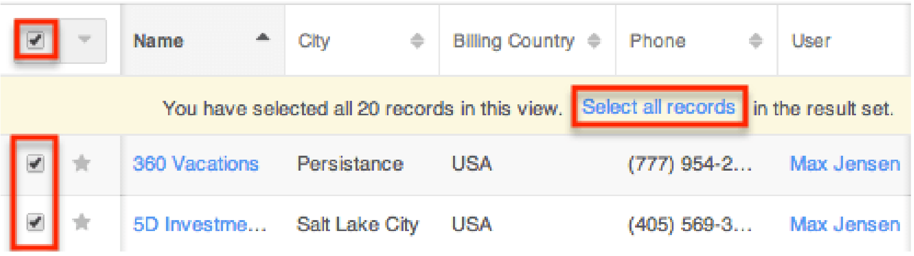
This export method is most useful when performing a type of data migration, needing an excess of detail, or performing a comprehensive import and update of the data, since this method exports all fields within a module. It is recommended the Export From Reports functionality be used for any other export 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.

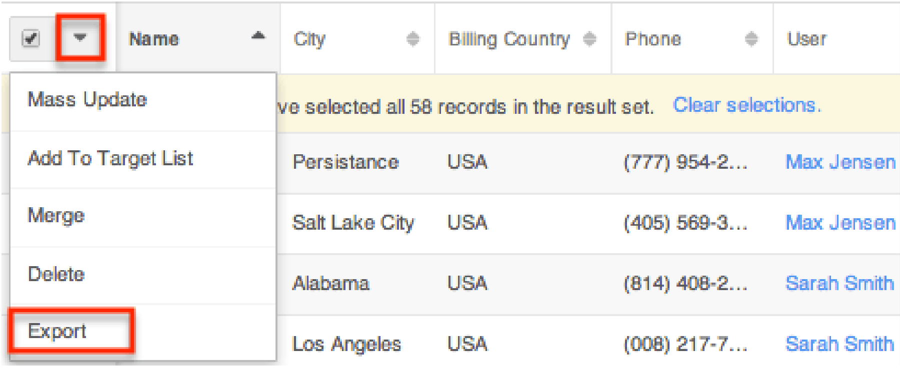
Exporting From Sidecar Module List Views

The following steps cover exporting from the Accounts module as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to export.
3. Select the desired account records individually by marking the checkbox on the left of each row.
    - **Note**: You can also use the Select All feature in the list view to select the first 1000 records in the result set. If you wish to export more than 1000 records or export a specific group of records on the list view, please use the filter option in module search to perform the exports in smaller batches.



4. Choose "Export" from the Actions menu.

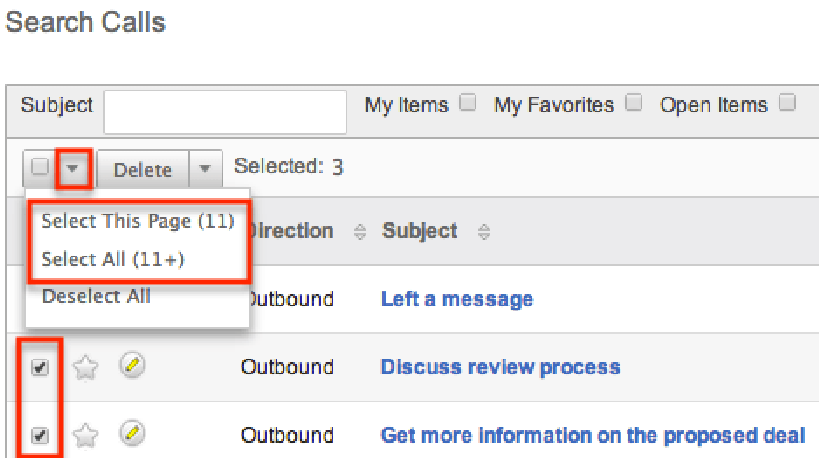


The CSV file will be downloaded to your local machine to a location defined by your browser settings. The file can be read and manipulated as necessary.

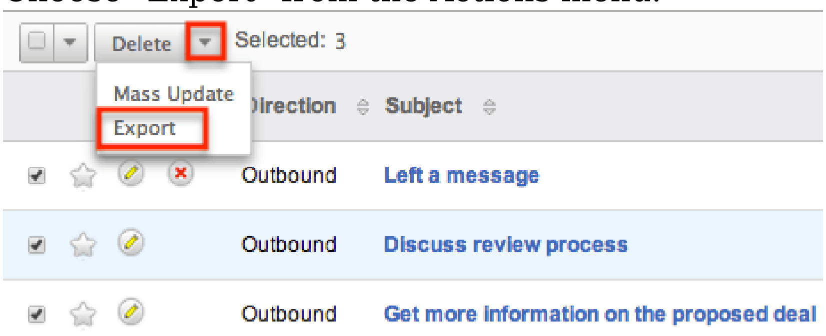
Exporting From Legacy Module List Views

The following steps cover exporting from the Calls module as an example:

1. Navigate to the Calls list view by clicking the Calls module tab.
2. Use the [Basic](#) or [Advanced Search](#) functionality to find the records you wish to export.
3. Select the desired call records individually or by using the checkbox dropdown's options.



4. Choose "Export" from the Actions menu.



The CSV file will be downloaded to your local machine to a location defined by your browser settings. The file can be read and manipulated as necessary.

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 re-purposed 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 be comprised of all stock and custom fields from the module. No data that would normally be found in a subpanel will appear on this export.

Exports from modules with team-based permissions enabled will contain two additional columns:

- **Selected Teams**: A comma-delimited list of the team names that are selected for extra access
- **Selected Team Set ID**: A unique identifier that references the group of teams contained in the Selected Teams field

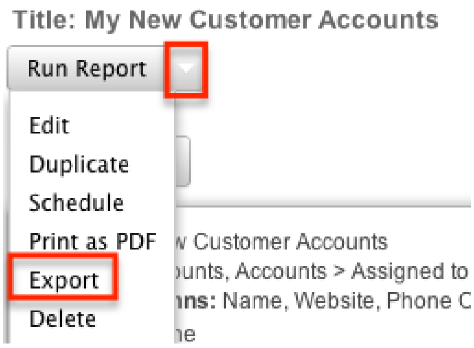
Exporting From Reports

In addition to exporting from a list view, users also have the option to export data from a report. Because reports allow you to select the specific fields you would like to see, users can narrow down what they 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 number 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 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.

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 report from the Report module's list view, 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 can determine which fields should be included on the export by configuring the report. 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 use 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.

	A	B	C
1	First Name	Last Name	Title
2	Dusty	Connor	IT Developer

The information that appears in your spreadsheet is dependent on which filters and display columns you added to your report. Only the information shown in the display columns when you view your final report will be included in your CSV export.

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Import

Overview

For most modules, Sugar allows users to transfer data from an external source (usually a comma-separated-values file) into the database via import. Sugar's import wizard is a quick and easy way to create or update many records at once. The import tool can be used to add a list of new customers or leads to the database, update existing data, migrate from a previous CRM system, or for any process that requires manipulating many records at once.

Your system's Sugar administrator may enable importing for the following modules:

- Accounts
- Business Centers
- Calls
- Campaigns
- Contacts
- Contracts
- Custom modules (if applicable)

- Escalations
- Leads
- Meetings
- Manufacturers
- Notes
- Opportunities
- Product Catalog
- Product Categories
- Product Types
- Purchased Line Items
- Purchases
- Quoted Line Items
- Revenue Line Items
- Shift Exceptions
- Shifts
- Targets
- Tasks

Users with an administrator or developer role can import records into the following modules:

- SugarBPM modules:
  - Process Definitions
  - Process Business Rules
  - Process Email Templates

- Tags
- Tax Rates
- Users
  Note: The import option can only be used to update existing user records for instances that use SugarIdentity. Administrators can access SugarIdentity via the SugarCloud Settings console to import a list of new users using a CSV file.

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.

Import Guidelines

Importing is a very important process for both new Sugar users and those who have been using Sugar for years. Depending on your business needs, you may run imports anywhere from multiple times per week to only once or twice per year.

Regardless of the import frequency, all users follow the same import guidelines:

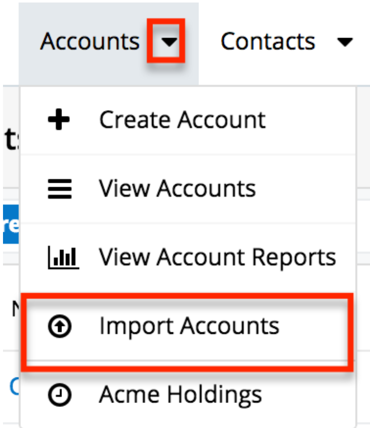
- **File Delimitation**: Sugar accepts files that are delimited by a given separator, such as commas or tabs. The most common type of import will be using a CSV (Comma Separated Value) file, but Sugar will accept other file types as long as it recognizes the delimiter.
- **Imposed Limitations**: Sugar, by default, does not impose any type of import limitations. However, System Administrators can impose a limit on the number 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 smoothly 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

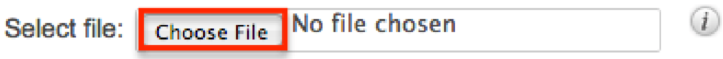
The first type of import that will be covered is importing new records. Whether you are just starting a migration from another CRM to Sugar or if you are adding a new list of records that you have received, such as a new list of leads or accounts, this process will help to get the data into Sugar without having to manually enter each record. After preparing your import file, follow these steps to import the list into Sugar:

Note: For instances that use SugarIdentity, administrators need to access SugarIdentity via the SugarCloud Settings console to import a list of new users using a CSV file.

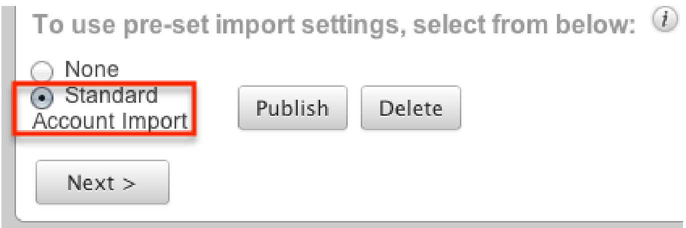
1. Navigate to the module tab for the module that you are importing into and select the import option. This will open the Import Wizard and bring you to the"Upload Import File" screen.



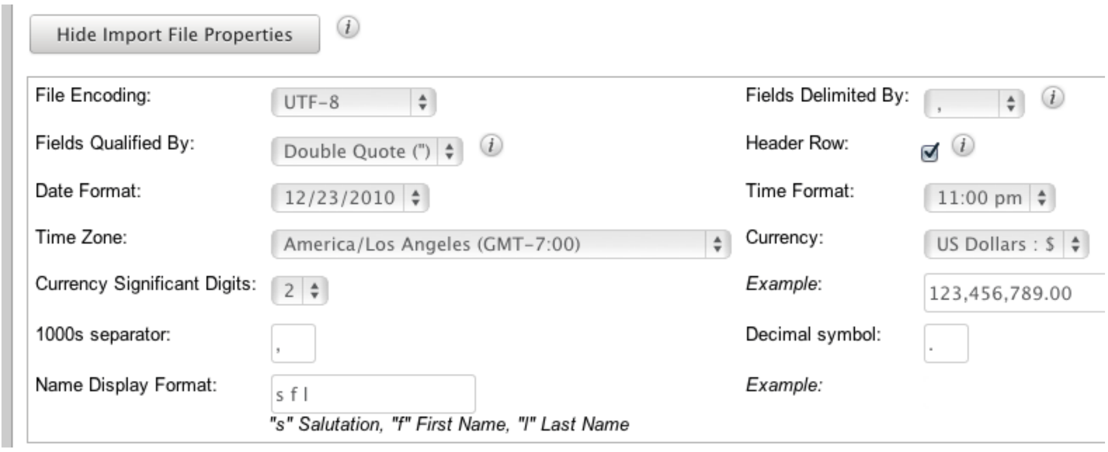
2. If you would like to review the Import File Template, you can download it from this page. This will give you a template of the format Sugar is going to be using to import your data. For more information on the template, please review the [Import File Template](#) section of this documentation.
3. 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.



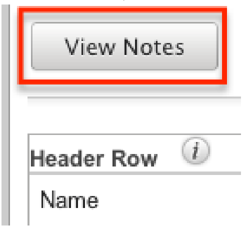
4. Ensure that "Create new records only" is selected.
5. If you have performed imports before and have previously saved your import settings, you can select your setting at the bottom of the page using the "To use pre-set import settings, select from below" option. If you do not have any saved import settings, this section will not appear. For more information on saving mapping, please review the [Saving Field Mappings](#) section of this documentation.



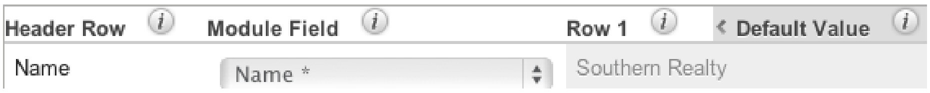
6. Click "Next" to access the "Confirm Import File Properties" screen.
7. This screen will show you the first two rows that Sugar is going to try to import as an example to let you know that your file was read properly by Sugar.
8. The Import Wizard automatically detects the properties of the file that 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.



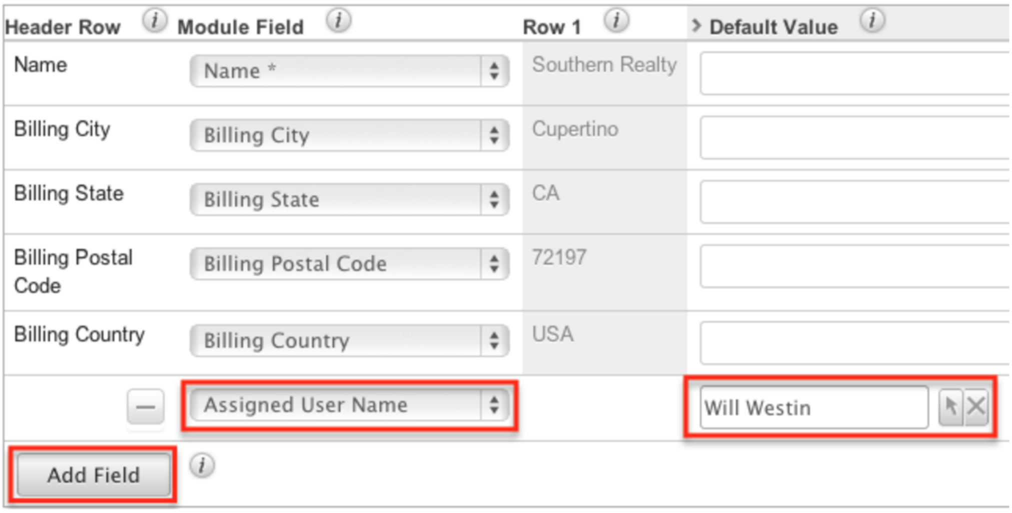
9. If the file was exported from either Salesforce.com or Microsoft Outlook, select the corresponding option under "If the import file data was exported from any of the following sources, select which one". If not, leave this as "None". This option will set up your mapping properly on the next screen.
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.



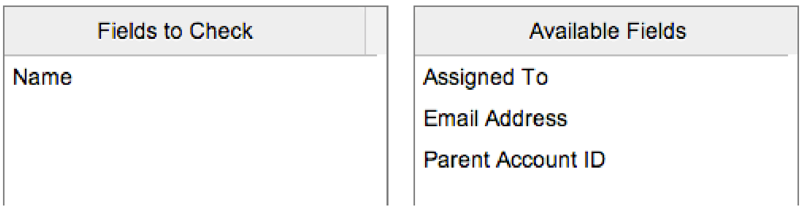
12. This screen presents you with four columns:
    - **Header Row**: This is the column header from your import file. This column will let you reference your file to make sure your column mapping is correct. If your import file does not have a header row, this column will not show.
    - **Module Field**: 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.

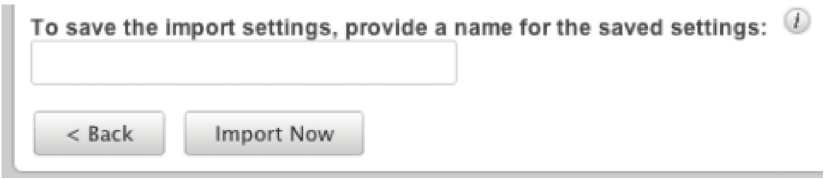


14. Click "Next" to access the Check for Possible Duplicates screen.
15. This menu allows users to check if there are duplicated values on the import to records that already exist in Sugar. This menu will vary depending on what module you are importing into as the fields will be specific to this module. The fields available to the Import Wizard are determined based on 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.

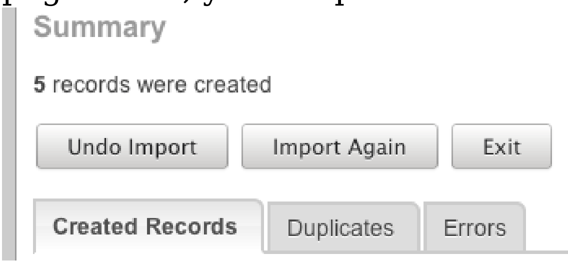


16. If the import configuration that you have set up is going to be used again in the future for additional imports, add a name at the button of the page so that it can be referenced later. For more information on saved field mappings, please review the [Saving Field Mappings](#) section of this

documentation.

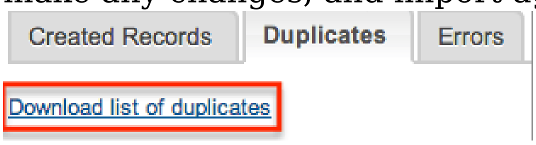


17. When your duplicate checking settings are complete, click "Import Now" to begin the import.
18. After the import completes, you are brought to the "View Import Results" page. Here, you are provided with a summary of the import.

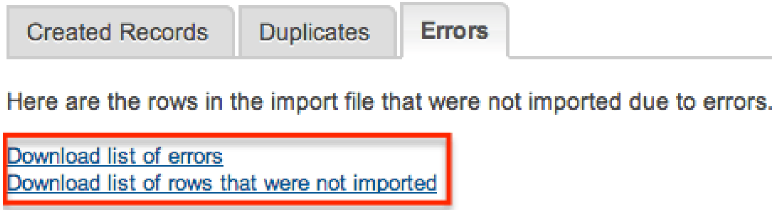


19. The summary will tell you how many records were created, how many were not created due to an error, and how many were found as duplicates.
20. There are three buttons below the Summary:

    - **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 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.



Note: 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 in 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 clean them up 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	

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 similarly 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.

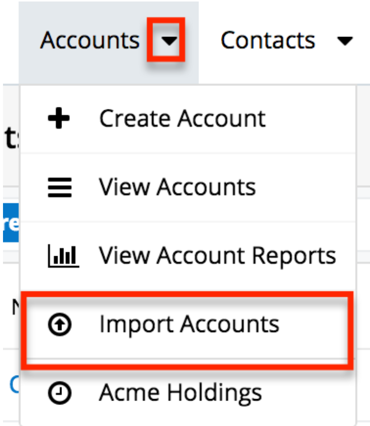
Note: All other fields (name, email address, etc.) are not considered unique and can have duplicates, so only the ID field will work to differentiate records for an update from import.

The ID field is not usually shown in 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 in the import file, they will create new records, which will create duplicates in your database.

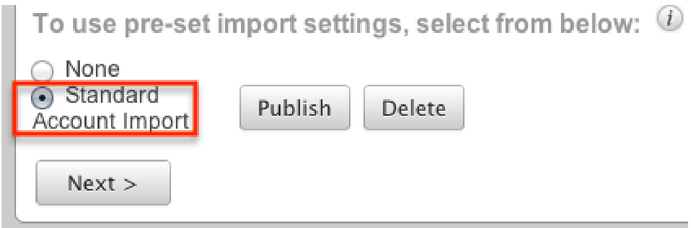
To import updates, follow the steps below.

1. To prepare the import file, you must have the ID numbers for all of the records that you are going to be updating. 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.

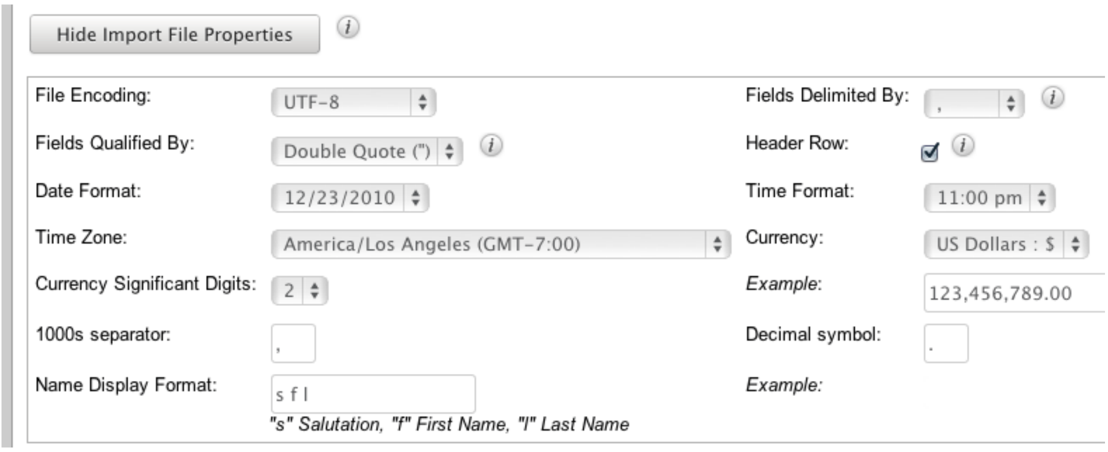


3. If you would like to review the Import File Template, you can download it from this page. This will give you a template of the format Sugar is going to be using to import your data. For more information on the template, please review the [Import File Template](#) section of this documentation.
4. 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.

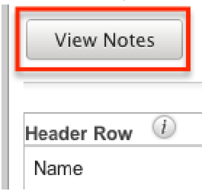
5. Select the option "Create new records and update existing records".
6. If you have performed imports before and have previously saved your import settings, you can select your setting at the bottom of the page using the "To use pre-set import settings, select from below" option. If you do not have 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.



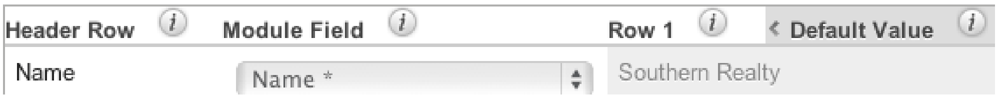
7. Click "Next" to access the "Confirm Import File Properties" screen. Before the "Confirm Import File Properties" screen opens, you will be prompted with an alert informing you that updates made to existing records cannot be undone. Read, and then click "OK" to proceed.
8. This screen will show you 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.



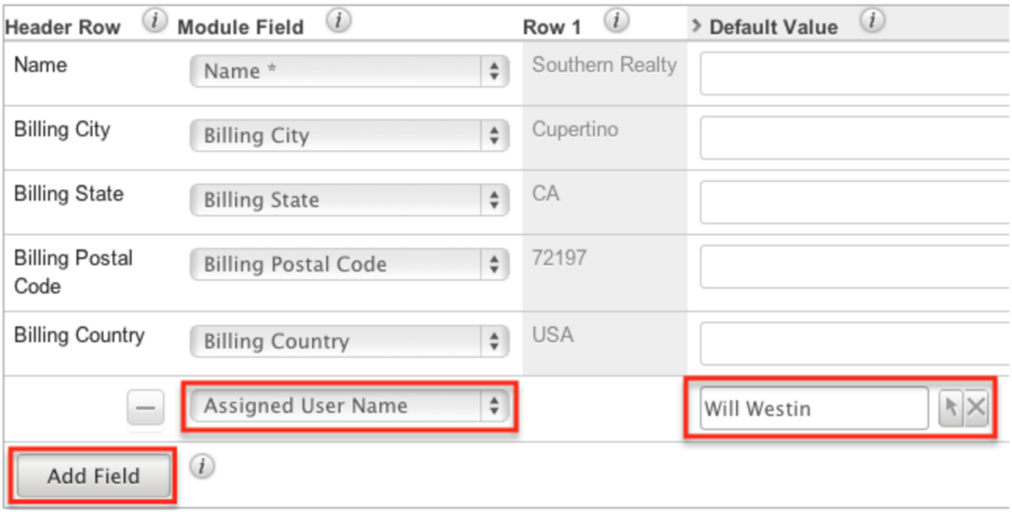
10. If the file was exported from either Salesforce.com or Microsoft Outlook, select the corresponding option under "If the import file data was exported from any of the following sources, select which one"**.** If not, leave this as "None"**.** This option will set up your mapping properly on the next screen. If this file was exported from Sugar, keep it set to "None"**.**
11. Click "Next" to access theConfirm Field Mappings screen.
12. Click the View Notes button for any relevant information, specific to this module, to the import that you are performing.



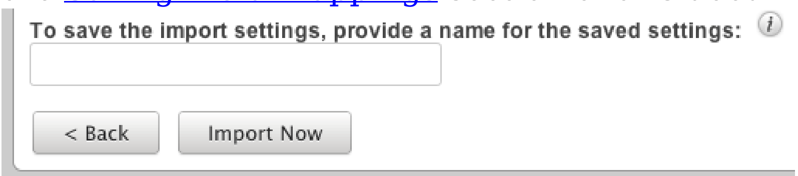
13. This screen presents you with four columns:
    - **Header Row**: This is the column header from your import file. This column will let you reference your file to make sure your column mapping is correct. If your import file does not have a header row, this column will not show.
    - **Module Field**: 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".



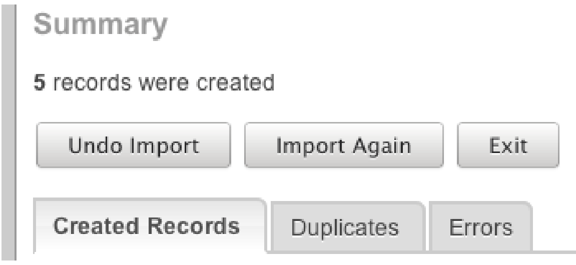
14. Click "Add Field" if any data needs to be added to the import that is not on your import file. This can be used if you would like to assign a value to a record when the column is not on your import file. This is used in conjunction with the Default Value column. For example, if you are importing 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.



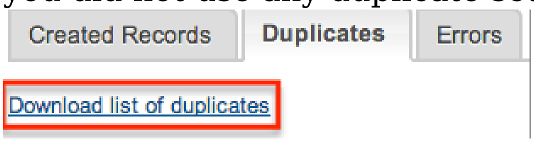
15. Click "Next" to access the Check for Possible Duplicates screen.
16. This menu allows users to check if there are duplicated values on the import to records that already exist in Sugar. Duplicate checking will only apply to new records created by the import. For more information on detecting duplicates, 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.



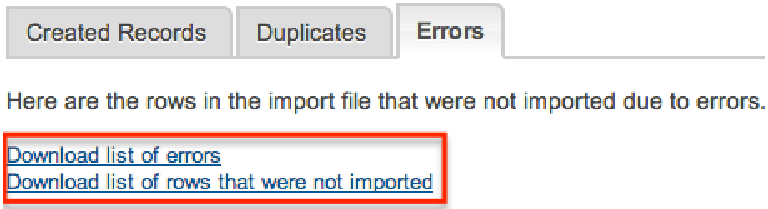
18. Click "Import Now" to begin the import.
19. After the import completes, you are brought to the "View Import Results" page. Here, you are provided with a summary of the import.



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 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.



Note: 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 in 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.

Updating the 'Date Modified' and 'Modified By ID' Fields

If the Date Modified and Modified By ID field values are blank in the import file or are set to "Do not map" during import, "Date Modified" will be set to the date and time that the record is imported and "Modified By ID" will be set to the ID of the user performing the import.

To make changes to records without affecting the Date Modified and Modified By ID fields, first export the data including the Date Modified and Modified by ID columns, and then import with the desired changes, including the original values in the Date Modified and Modified by ID columns. For example, if you want to mark half of your RLIs for purchase generation, but you do not want to affect the historical values of these fields, do an import to update the Purchase Generation field value to "Yes" and include the exported Date Modified and Modified By ID fields to preserve their values.

Updating the 'Date Created' and 'Created By ID' Fields

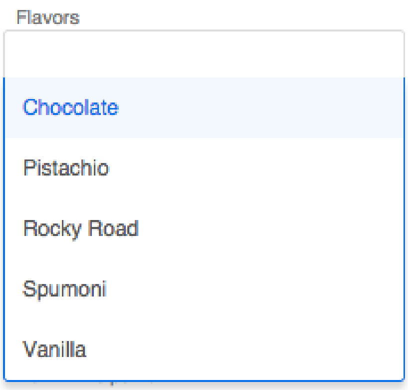
If the Date Created and Created By ID field values are blank in the import file or are set to "Do not map" during import, "Date Created" will be set to the date and time that the record is imported for new records. For existing records, the original time will be preserved. "Modified By ID" will be set to the ID of the user performing the import for new records. For existing records, the original user will be preserved.

Importing Fields With Multiple Values

Multiselect fields allow for the input of multiple values. When importing data to these fields, it is possible to import multiple field values using a comma delimiter within the field.

Importing Multiselect Fields to New Records

To import multiple values to a multiselect field on a new record, the import data file's mapped column should contain exact character matches to existing dropdown values separated by commas. For example, a multiselect field for Flavors contains the options Chocolate, Pistachio, Rocky Road, Spumoni, and Vanilla.



To import a new record that contains both "Vanilla" and "Chocolate" in the Flavors field, the import data file's Flavors column should contain Vanilla,Chocolate with a comma separating the values and no extra spaces. If one of the imported multiselect options is a phrase, such as "Rocky Road", then the imported data field should contain a space character only within that value: Vanilla,Chocolate,Rocky Road.

	A	B	C
1	First Name	Last Name	Flavors
2	Justine	Cambra	Vanilla,Chocolate,Rocky Road
3	Hugo	Bork	Vanilla,Pistachio,Chocolate
4	Jewell	Haas	Vanilla,Pistachio,Spumoni,Chocolate
5	Beulah	Randel	Chocolate
6	Abdul	Ducote	Chocolate

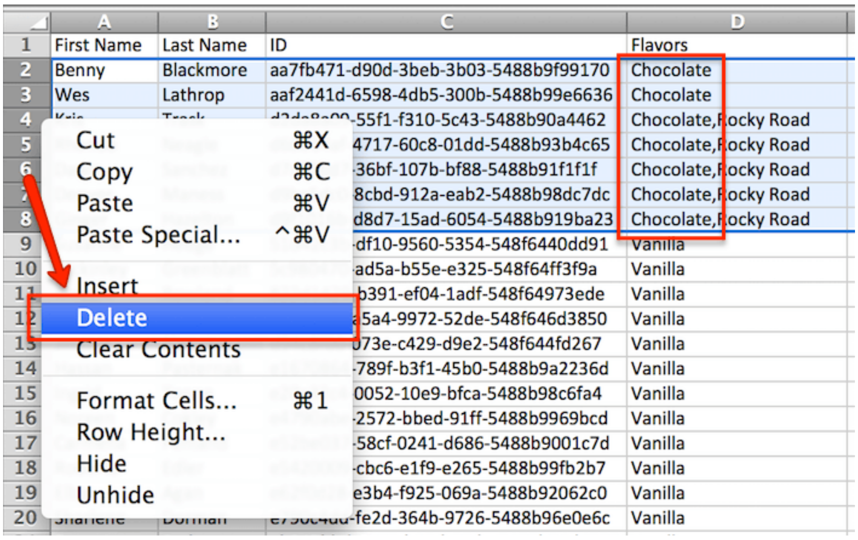
Note: The dropdown option display labels are not required to be unique, so best practice is to import the database values if they are known. For more information about how admin users can see database values and display labels for dropdown options, please refer to the Dropdown Editor documentation.

Importing Multiselect Fields to Existing Records

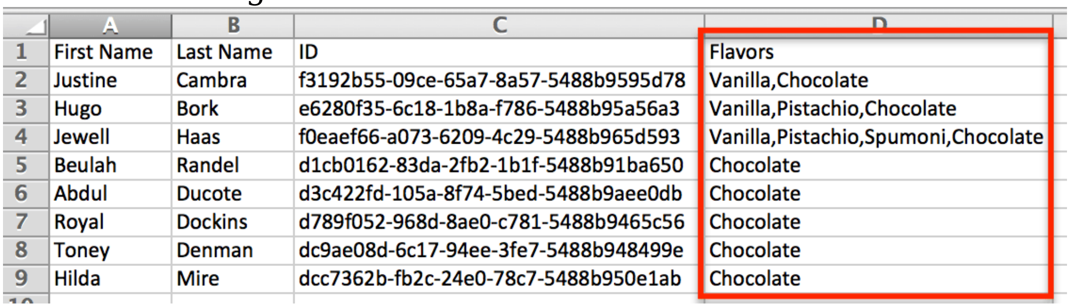
Importing updates to a multiselect field of a record already existing in Sugar will erase any previous values and replace them with the imported values. If you wish to append new values to the existing values via import, you must first export the contents of the field for each record you will be updating, add the desired values to the existing values in by modifying the exported CSV file, then import the modified export file to Sugar.

For example, imagine you would like to update 100 existing contact records. Each of the 100 contacts should have "Chocolate" added to the multiselect field "Flavors" without losing the data that is stored in the multiselect field already. The following steps explain how to append a multiselect field via import:

1. Export the list of 100 contacts that need to be updated.
2. Preserve (at least) the Last Name, ID, and Flavors fields in the export file. The other field columns may be deleted.
3. Sort the spreadsheet data by the Flavors column.
4. Remove any rows from the file that already contain "Chocolate" as a value in the Flavors column.



5. If the Flavors column contains any empty cells, type the word Chocolate in those cells. In the remaining cells of the Flavors column, add ,Chocolate (with a leading comma but no extra spaces) to the end of the existing character string.



	A	B	C	D
1	First Name	Last Name	ID	Flavors
2	Justine	Cambra	f3192b55-09ce-65a7-8a57-5488b9595d78	Vanilla,Chocolate
3	Hugo	Bork	e6280f35-6c18-1b8a-f786-5488b95a56a3	Vanilla,Pistachio,Chocolate
4	Jewell	Haas	f0eaef66-a073-6209-4c29-5488b965d593	Vanilla,Pistachio,Spumoni,Chocolate
5	Beulah	Randel	d1cb0162-83da-2fb2-1b1f-5488b91ba650	Chocolate
6	Abdul	Ducote	d3c422fd-105a-8f74-5bed-5488b9aee0db	Chocolate
7	Royal	Dockins	d789f052-968d-8ae0-c781-5488b9465c56	Chocolate
8	Toney	Denman	dc9ae08d-6c17-94ee-3fe7-5488b948499e	Chocolate
9	Hilda	Mire	dcc7362b-fb2c-24e0-78c7-5488b950e1ab	Chocolate

6. Save this file for import.
7. Follow the steps in the Importing Updates to Existing Records section of this documentation to complete the import and update process.

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.

Please note that when an opportunity is imported into Sugar, a revenue line item must also be imported and related to the opportunity in order to populate the amounts (e.g., best, likely, etc.) on the opportunity record. Be sure to include the the opportunity ID and amounts on the revenue line item import file.

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. For additional tips and steps to import related records, please refer to the Importing Related Records article.

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**: 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.
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 Non-Primary Email Address	Importing an existing email address into Sugar's Contacts module will cause all email messages related to that email address may match the contact's primary or non-primary email address and must be exact for the relationship to form properly. **Note**: Importing an update to a contact with an existing email address, the Opt-Out and Invalid checkboxes will not be disabled if they are checked on the existing email address.
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 [Lead Conversion](#) 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 Lead Conversion 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 Lead Conversion 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 Lead Conversion documentation.
	Emails	Email Address Non-Primary Email Address	Importing an existing email address into Sugar's Leads module will cause all email messages related to that email address may match the lead's primary or non-primary email address and must be exact for the relationship to form properly. **Note**: Importing an update to a contact with an existing email address, the Opt-Out and Invalid checkboxes will not be disabled if they are checked on the existing email address.
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**: 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.
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.
Revenue Line Items	Accounts	Account ID	Use the existing Sugar account record ID to which the revenue line item's opportunity belongs. **Note**: The Account Name field in revenue line items is normally populated based on the selected opportunity's related account and cannot be manually modified on the record view. If you import using the Opportunity ID and Opportunity Name,

			the related account name will automatically populate in the Account Name field.
		Account Name	Use the existing account name related to the revenue line item's opportunity **Note**: The account name must be entered exactly as it appears in Sugar in order for the records to be related properly.
	Campaigns	Campaign ID	Use the existing Sugar campaign record ID number from which the revenue line item's opportunity originated.
		Campaign	Use the existing Sugar campaign name that is related to the revenue line item's opportunity. **Note**: The campaign name must be entered 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 revenue line

			item will not relate properly.
	Opportunities	Opportunity ID	Use the existing Sugar opportunity record ID number to relate the revenue line item to the opportunity record.
		Opportunity Name	Use the existing opportunity name as it appears in Sugar to relate the revenue line item.
	Products	Product Template ID	Use the existing Sugar product catalog record ID number to relate to the revenue line item.
		Product	Use the existing product catalog name as it appears in Sugar to relate to the revenue line item.
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 Lead Conversion documentation.
Tasks	Contacts	Contact ID	 Use the existing Sugar contact record ID number to connect the contact name into the new Task record.
	Flex Relate	Related To ID Related To Module	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 ID**: The ID for the record you are relating. **Related To Module**: The Sugar module's plural name for the record that you are going to relate (Accounts, Contacts, etc.).

Importing Team-Based Permissions

Modules with team-based permissions enabled support two additional columns for imports:

- **Selected Teams**: A comma-delimited list of the team names that are selected for extra access
- **Selected Team Set ID**: A unique identifier that references the group of teams contained in the Selected Teams field

When importing a list of new records or record updates, include one of these columns in the import file to set record-level access to the records. If known, the Selected Team Set ID field is the most efficient way to communicate the data to Sugar. In the more common scenario that the ID is unknown, simply insert the name of the selected team (or teams separated by commas) in the Selected Teams field.

Import File Template

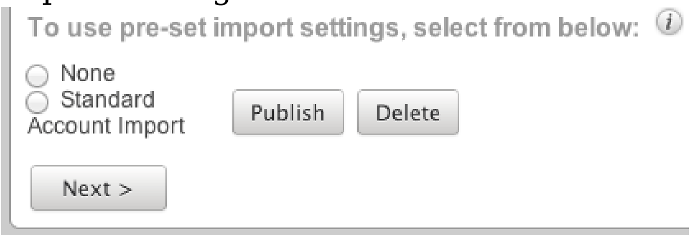
The Import File Template is a very useful tool for building your import file from another source or from scratch. The template for any module can be found on the Upload Import File page, which is either the first or second page of the wizard, depending on the module.

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. For instances that use SugarIdentity, there are a number of user fields that are read-only which can only be edited in SugarIdentity via the SugarCloud Settings console. So, including any read-only fields in the import file will not update the user records with the updated values. 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.

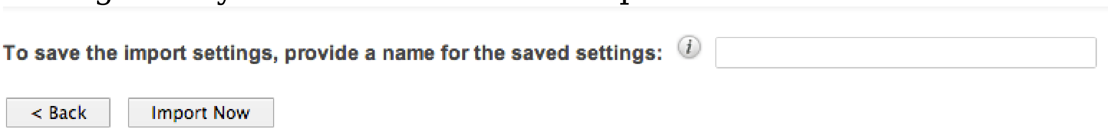
It is best to use the format supplied in this template whenever possible to make your import process as seamless as possible.

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.

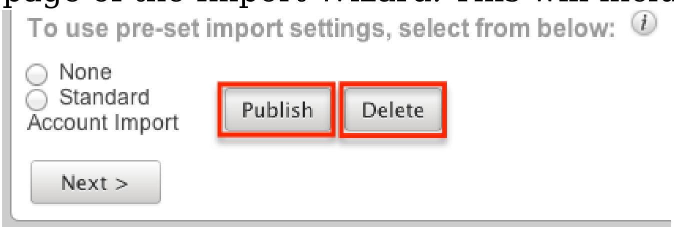


On the "Check for Possible Duplicates" page of the wizard, which is the last page before performing your import, there is a text box where you can name the import settings that you have used on this import.



Once you click "Import Now", this mapping will be saved and available for your use in future imports.

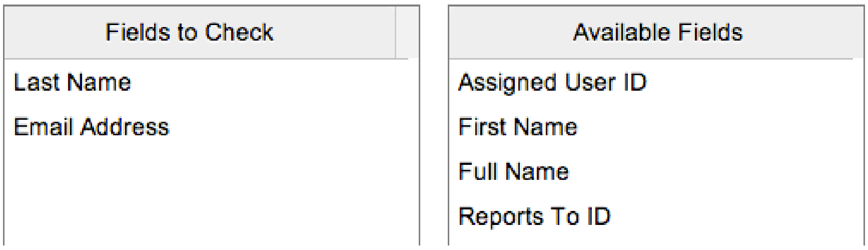
This mapping is now saved for your user and will appear on the Upload Import File page of the Import Wizard. This will include two buttons for "Publish" and "Delete".



- **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 template 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 or a matching email address to an existing contact in Sugar will be marked as a duplicate.



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 on system-defined indexes.

If your import file has any duplicate records based on 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.

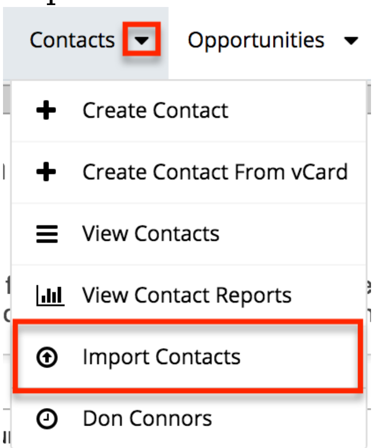
Any duplicates will show as such on the final page of the import. You will also have the option to download the duplicates so that they can be manually cross-referenced to verify if they are actually duplicates. If they are not, simply re-run the import process without selecting any fields on the "Check for Possible Duplicates" page.

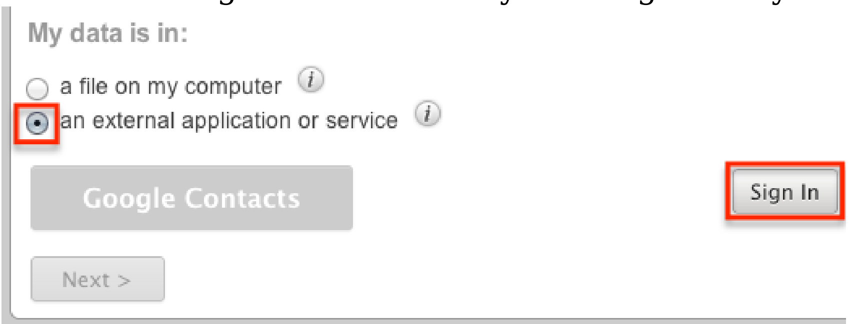
External Data Sources

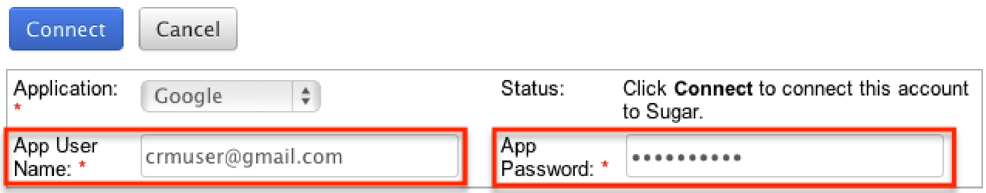
When importing data to Sugar, there are other options than importing a data file exported from another source. Sugar offers an option to directly connect to an outside application or service through the Import Wizard and have Sugar pull the information directly from the source. This functionality is currently only available for Google Contacts.

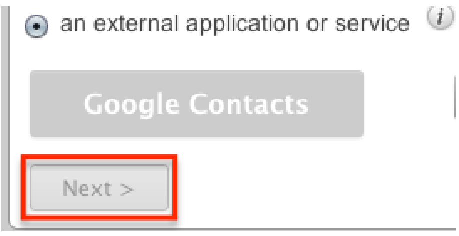
The import process is very similar to what is described above, but with some differences to speed up the process for users who would like to import all contact data into Sugar

Importing Data From Google

1. Navigate to the module tab for the person-type module (e.g., Contacts) 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.


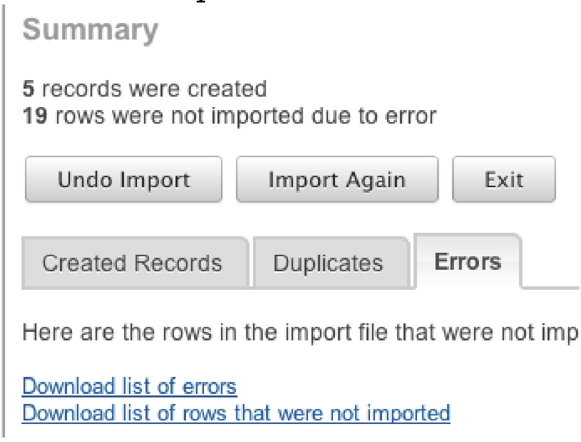
3. Fill in your user name and password for the Google account you would like to connect to and click "Connect".


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.

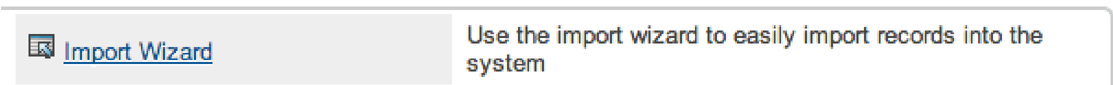
6. There is no duplicate check for this type of import, but names and email addresses are automatically checked for duplicates.
7. Click "Import Now" after you have completed your mapping.
8. On the "View Import Results" screen, you will see that all of your Google contacts have been successfully imported 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. Please note that the import option can only be used to update existing user records for instances that use SugarIdentity. Administrators can access SugarIdentity via the SugarCloud Settings console to import a list of new users using a CSV file.

Last Modified: 2022-01-13 20:41:07

Processes

Overview

Sugar's Processes module is the user-facing portal to SugarBPM™, Sugar's business process management tool that allows administrators to streamline everyday business processes by managing approvals, sales processes, call triaging, and more. A business process is a set of logically related tasks that are performed in order to achieve an organizational goal. It presents all of the tasks that must be completed in a simplified and streamlined format.

SugarBPM empowers Sugar administrators to automate vital business processes for their organization. Some examples of business processes that can be automated using SugarBPM include invoice approvals, lead routing, customer service case routing, and automated reminders and escalations. This documentation will cover how to use the Processes module, as well as the various actions and options available from within the module. For more information on how administrators can create and configure processes, please refer to the SugarBPM documentation in the Administration Guide.

Note: SugarBPM™ is not available in Sugar Professional.

For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting quote records, please refer to the Working With Sugar Modules section of this page.

Process Fields

The Processes module contains the following fields. Please note that administrators and users with developer-level role access cannot alter, add, or remove fields via Studio as they typically can with other Sugar modules.

Field	Description
Assigned To	The user assigned to the record that requires approval or routing.
Date Modified	The date and time that the process definition's Activity element was initiated.
Date Created	The date and time that the process

	definition's Activity element was initiated.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field. **Note**: This field is not visible in the user interface.
Process Number	A unique, auto-increment number that is used to identify this process. **Note**: Process numbers are generated in sequential order as new processes are triggered.
Process Definition Name	The name of the process definition record that generated this process; For more information about Process Definitions, please refer to the Process Definitions documentation in the Administration Guide.
Process Name	The name given to the process definition's Activity element by the process owner.
Process User	The user responsible for executing this process' Activity element.
Process Owner	The user assigned to the process definition record that generated this process.
Record Name	The name or title of the record that requires approval or routing.

Viewing Processes

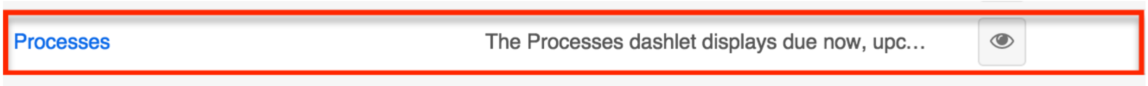
The Processes module is the only SugarBPM module that is visible to regular users. From the Processes module list view, you can view running processes if there is anything for you to approve or review. You can view those same processes via the Processes dashlet in addition to any self-service processes waiting to be claimed in the Self Service Processes tab.

Viewing Via Dashlet

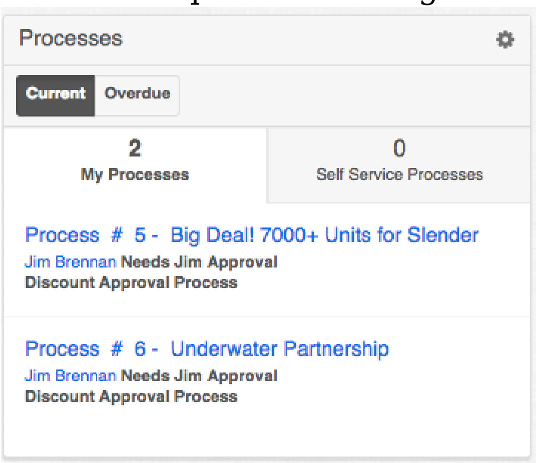
All users who may be engaged in a process should place the Processes dashlet on their home screens. Process users will not receive an email notification when an activity is ready for them (unless the administrator has explicitly configured this within the process definition). The dashlet makes it easy for users to know when it is their turn to participate in a process and to take the appropriate action.

Note: Users (including administrators) will see only the processes that immediately require their attention in the Processes dashlet.

To add the Processes dashlet, please refer to the Adding Dashlets section of the Intelligence Pane documentation, choosing "Processes" from the Add a Dashlet page.



After saving the dashlet and its containing dashboard, the dashlet will offer several Processes-specific filtering tools:



- **Current**: Click on this button to view processes that are running within the expected timeframe.
- **Overdue**: Click on this button to view processes that have a due date in the past. The label "Overdue" and the due date will be displayed adjacent to the Process description.
- **My Processes**: Enable this tab to view only the running processes upon which the logged-in user must act. To execute the Process, click on the name of the process. Please note that admin users can not see processes running for other users via the dashlet. To access the system's exhaustive list of running and completed processes, please refer to the Process Management section of the Administration Guide.
- **Self Service Processes**: Enable this tab to view only the running

processes in the queue to be claimed by a user. Self-Service processes are configured inside the User Activity element settings of the related process definition.
- **Process Description**: Running processes are displayed in list view format with descriptive fields including the unique process number, the name of the affected Sugar record, the process title, the responsible user's name, and the label of the relevant process step.
- **Due Date**: When a due date exists it will appear adjacent to the process description.

To execute a process from the Processes dashlet, please refer to the Executing Processes section of this page.

Viewing Via List View

The Processes list view displays all running processes that require the logged-in user to take action (e.g., approve, reject, etc.) and that meet the current search criteria. Users will not see processes for any other user – even if the other user is a direct report or a member of the same team. To access the list view, simply click the Processes module tab. To view or execute one of the process activities from the list view, select "Show Process" from the record's list view Actions menu.

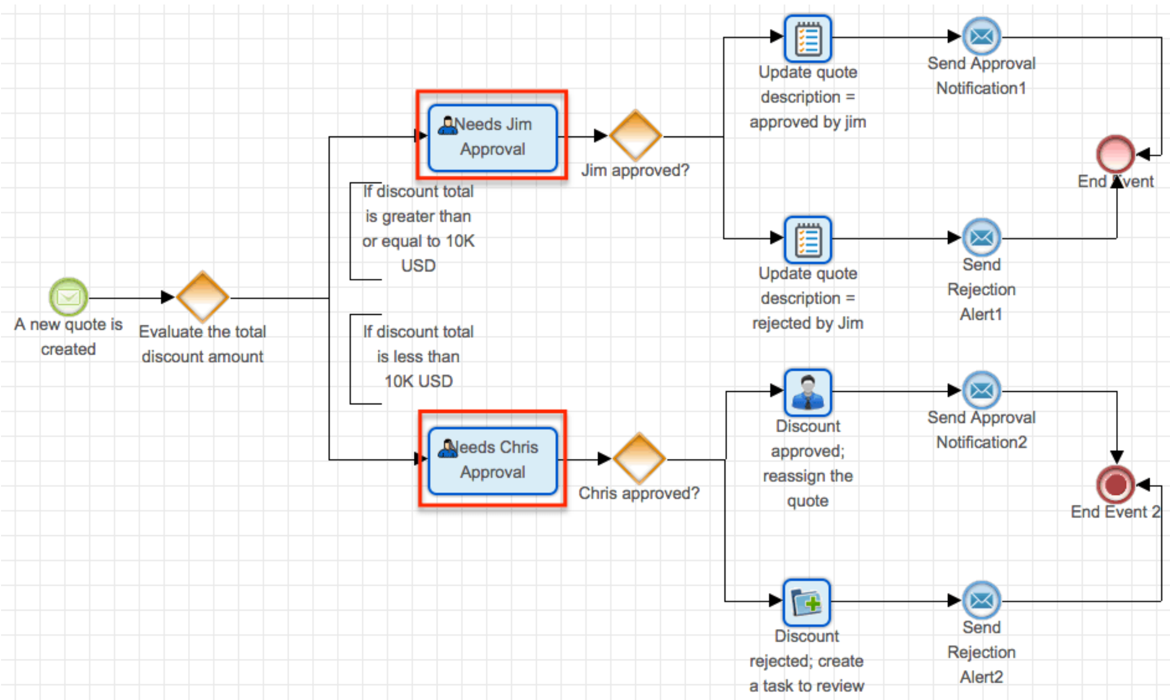
Executing Processes

When a running process requires action from a user, that user will see the process in their Processes dashlet and Processes module list view. At these moments within a flow, a user needs to decide if a circumstance is approved or rejected or review and/or edit a Sugar record. This decision is formally indicated by executing the process. The following sections explain how to execute the different process activities in Sugar.

Approval Processes

An approval process is a moment within a flow where a user must decide if a circumstance is approved or rejected. When an approval process requires action from a user, that user will see the process in their Processes dashlet and Processes module list view. The user will formally indicate their approval by executing the process.

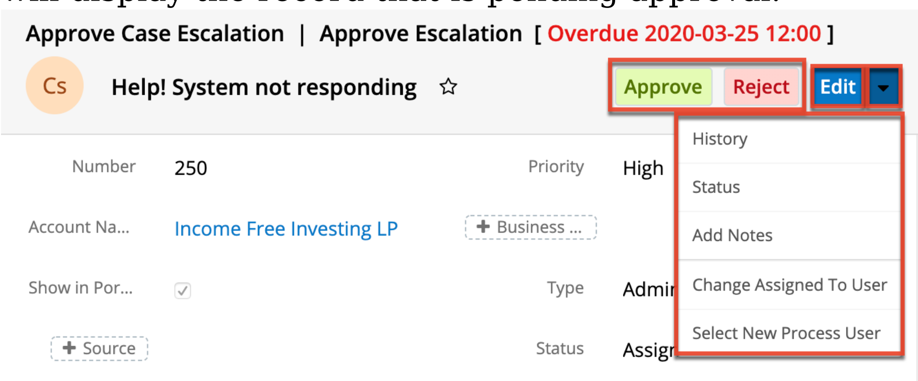
As an example, an organization may require a different manager's approval depending on the discount total. The following image portrays how a Sugar process could automate this approval:



All of the steps in the above process are automated except for two approval steps: "Needs Jim Approval" and "Needs Chris Approval". When the automated process reaches either of these steps, Jim or Chris will see a line item in his Processes dashlet and list view. The following two sections explain what a running approval process looks like and how to execute the approval.

Approval Process Actions Menu

When a process requires an approve or reject response, the process' record view will display the record that is pending approval.



Below the process details are the process' approval buttons and process Actions menu, which allow you to perform the following operations:

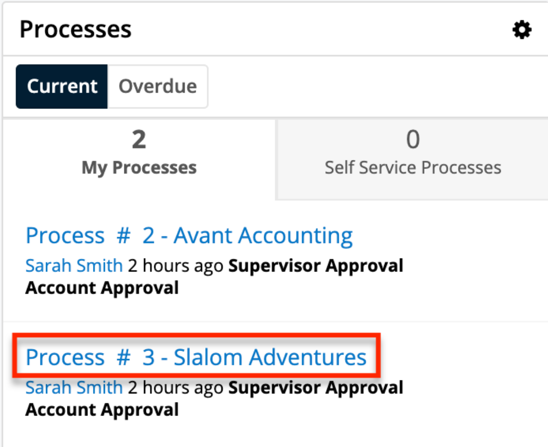
Menu Item	Description

Approve	Allow the process to continue to the next step along the approval path.
Reject	Allow the process to continue to the next step along the rejection path.
Edit	Edit the fields on the record to be approved.
History	Display the entire time-stamped history of all transitions, user engagements, and automated occurrences for this process.
Status	Display an image of this process' overall flow including the approval and rejection paths for this approval step.
Add Notes	Add notes for people who will engage with the process later and/or read notes left by other users before you.
Change Assigned To User	Choose a new Assigned To user for the Sugar record. **Note**: This option must be enabled by the administrator.
Select New Process User	Choose a new user to execute this process. **Note**: This option must be enabled by the administrator.

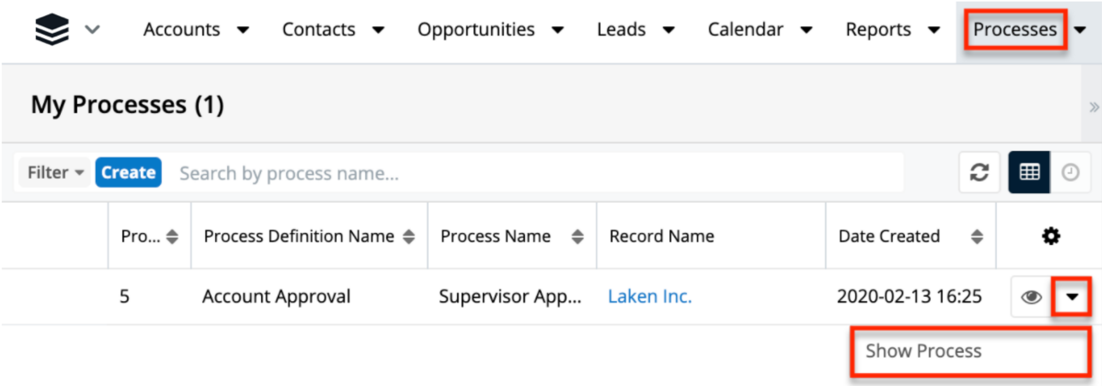
Executing an Approval Process

Follow the steps below to execute an approval process:

1. Click on the hyperlinked process name in your Processes dashlet. Please note that the dashlet will not differentiate between Approval processes and Routed processes. The process type will become apparent on the next screen.



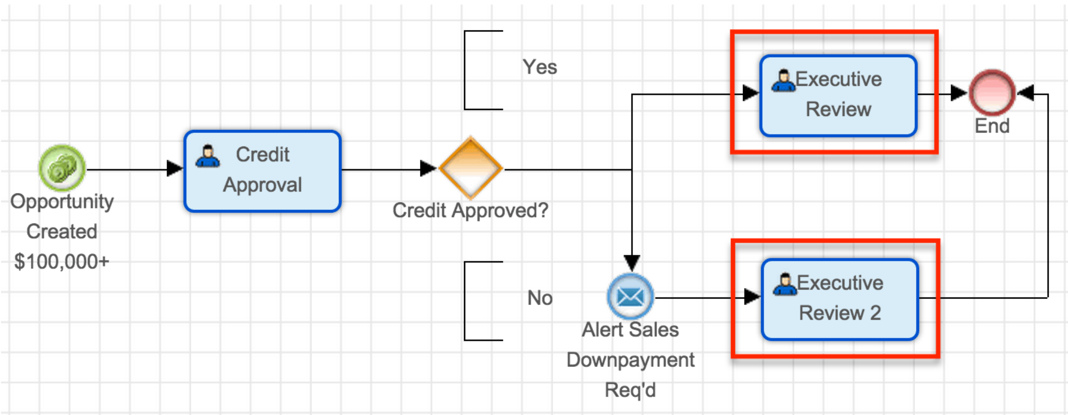
Alternatively, navigate to Processes list view and choose "Show Process" from the Actions menu of the record:



2. The process landing page is the record view of the affected Sugar record. Expand the record's Actions menu to browse the available process options. For an overview of Processes-specific features and options that are available here, please refer to the Approval Process Actions Menu section of this page. You can review the user notes and history or, if enabled, choose to delegate this process step to another user.
3. If desired or required by the process, edit any fields on the Sugar record by clicking the Edit button.
4. Finally, click on either "Approve" or "Reject" to execute the process and return to your dashboard, where the executed process will no longer appear in the Processes dashlet.

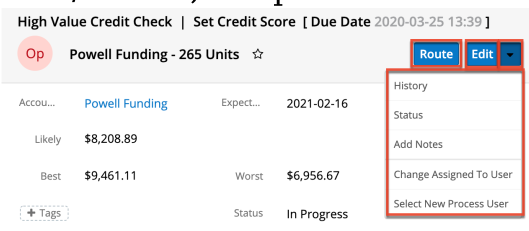
Routed Processes

The other user activity that a process may require is to simply review and/or edit a Sugar record. For example, a high-value quote record may not require approval, but the executive team should be able to review the quote for capacity-planning purposes. In this situation, the process definition can be configured to route the process flow through the members of the executive team without requiring a conditional response. The following image portrays how a Sugar process will automate this procedure:



Routed Process Actions Menu

When a process routes a record to a user to review and/or edit, the process' record view will display the record that is pending review.



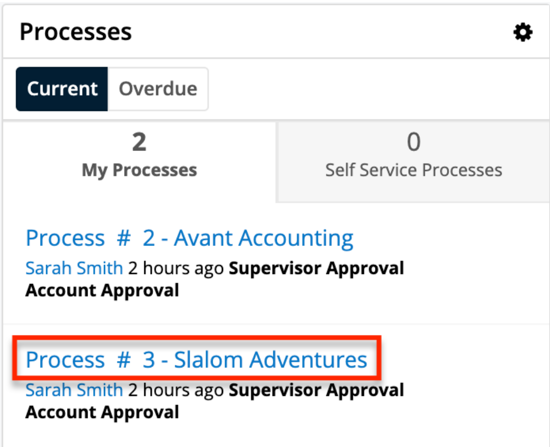
Below the process details are the process' Route button and Actions menu, which allow you to perform the following operations:

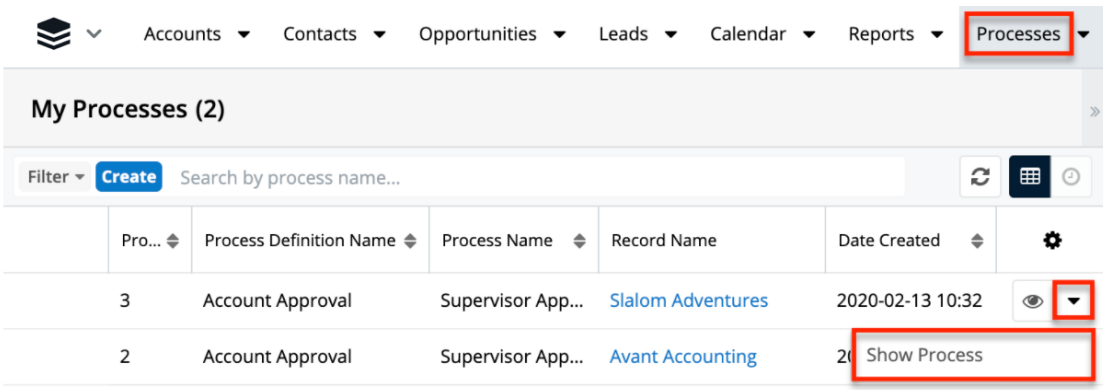
Menu Item	Description
Route	Allow the process to continue to the next step.
Edit	Edit the fields on the record to be approved.
History	Opens a popup window that displays the entire time-stamped history of all transitions, user engagements, and automated occurrences for this process.
Status	Opens a popup window that displays an image of this process' overall flow including the approval and rejection paths for this approval step.
Add Notes	Opens a popup window where you can add notes for people who will engage with the process later or read notes left by other users before you.

Change Assigned To User	Choose a new Assigned To user for the Sugar record. **Note**: This option must be enabled by the administrator.
Select New Process User	Choose a new user to execute this process. **Note**: This option must be enabled by the administrator.

Executing a Routed Process

Follow these steps to execute a process that has been routed to you:

1. Click on the hyperlinked process name in your Processes dashlet. Please note that the dashlet will not differentiate between Approval processes and Routed processes. The process type will become apparent on the next screen.


Alternatively, navigate to Processes list view and choose "Show Process" from the Actions menu of the record:


2. The process landing page is the record view of the routed Sugar record. Expand the record's Actions menu to browse the available process options. For an overview of process-specific features and options that are available

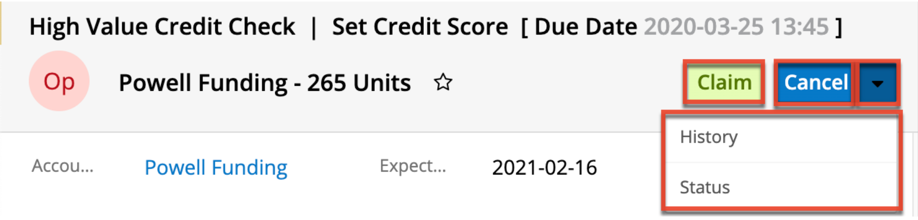
here, please refer to the Approval Process Actions Menu section of this page.
3. When a flow has been routed to you for review, the only required action is to acknowledge receipt. However, you may first choose to edit the affected record. Review the details of the Sugar record and inspect the process notes for any critical information that your colleagues may have shared. For information about viewing process Notes, please refer to the Viewing Process Notes section of this page.
4. When you have completed making edits and reviewing the record, click "Route" to complete the process. This will redirect you to your dashboard, where the executed process will no longer be visible in your Processes dashlet.

Self-Service Processes

Some user-facing processes will not have a designated process owner. Instead, users will be empowered to claim responsibility for them. These processes will appear in the Self Service Processes tab of the Processes dashlet. Self-service processes may require either an approval/rejection response or review of a routed action.

Self-Service Process Actions Menu

Self-service processes may require either an approval/rejection response or review of a routed record, but first, a user must claim the process. When a user claims a self-service process, the process' record view will display the record that is waiting to be claimed.



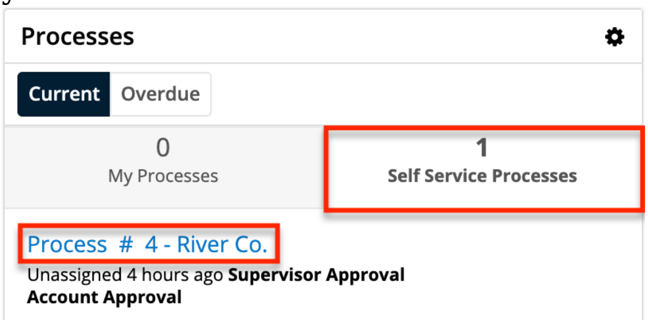
Below the process details are the process' Claim button and Actions menu, which allow you to perform the following operations:

Menu Item	Description
Claim	Volunteer to execute this process and remove it from view of other team members. The process can be immediately executed after claiming it, or you can navigate away and find the

	process later in the My Processes tab of your Processes dashlet.
Cancel	Navigate back to the home page without claiming this process.
History	Opens a popup window that displays the entire time-stamped history of all transitions, user engagements, and automated occurrences for this process.
Status	Opens a popup window that displays an image of this process' overall flow including the approval and rejection paths for this approval step.

Claiming a Self-Service Process

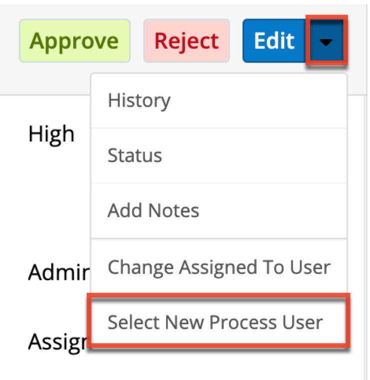
Follow these steps to claim and then execute a self-service process:

1. Click on the hyperlinked process name in the Self Service Processes tab of your Processes dashlet.


2. The process landing page is the record view of the affected Sugar record. Expand the record's Actions menu to browse the available process options. For an overview of process-specific features and options that are available here, please refer to the Self-Service Process Actions Menu section of this page.
3. Click on "Claim" to indicate your intention to execute this process and remove it from the view of other team members. After clicking the Claim button, the page will reload and expose the Approve/Reject or Route buttons, depending on what type of process activity has been configured. The process can be immediately executed after claiming it, or you can navigate away and find the process later in the My Processes tab of your Processes dashlet.
4. Execute the process as explained in either the Executing Approval Processes or Executing Routed Processes sections of this page.

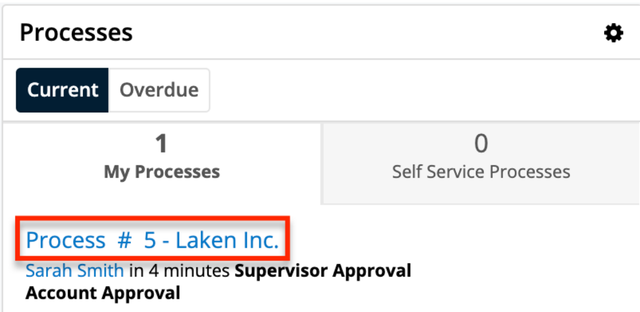
Choosing a New Process User

When a process is routed to you for review or approval, it may be possible to designate a new user to execute the process. The administrator can enable or disable this option on each process definition, so it may be possible to do this for one process but not another. If the option is enabled, "Select New Process User" will be available in the Actions menu on the process record view:

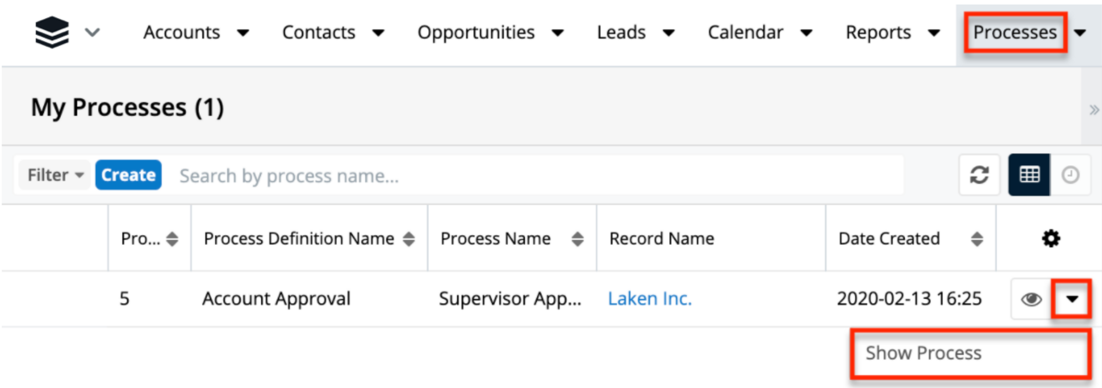


Follow these steps to reassign a process:

1. Click on the hyperlinked process name in your Processes dashlet. Please note that the dashlet will not differentiate between Approval processes and Routed processes. The process type will become apparent on the next screen.

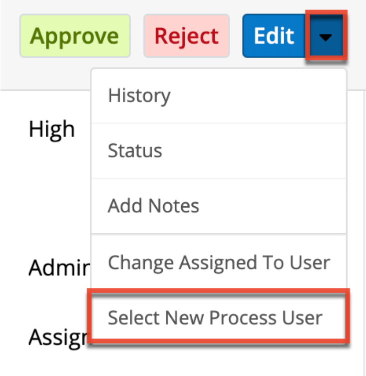
   Alternatively, navigate to Processes list view and choose "Show Process" from the Actions menu of the record:

2. The process landing page is the record view of the affected Sugar record.

Note: Legacy user-interface modules will display the record's edit view.

3. Click on the triangle next to the Edit button to reveal the Actions menu. Click on "Select New Process User".



Note: If "Select New Process User" is not displayed, then the administrator has not enabled reassignments for this type of process. Please contact the administrator and ask them to reassign the process for you.

4. The "Select New Process User" window will appear.

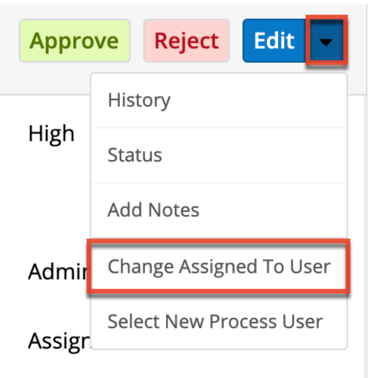
There are three options:

- **User**: Choose a user to complete this step of the process. The administrator will have specified one Sugar team from which you may choose any member.
- **Type**: Choose a reassignment method:
  - **Round Trip**: Choose "Round Trip" to make the process route back to you when the new user has completed this step.
  - **One Way**: Choose "One-Way" to direct the process to a new user, and then have it continue to its next step without routing back to you.
- **Note**: As a best practice, add a note explaining why you are choosing a new user to execute this process. The new user will see your note when she clicks on "View Notes".

5. Click on "Save" to be redirected to your dashboard where the reassigned process will no longer be visible on your Processes dashlet.

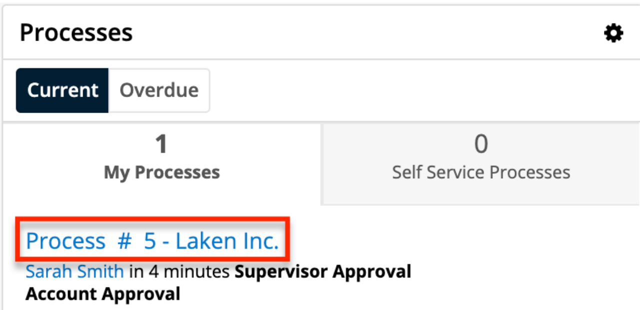
Choosing a New Assigned To User

When a process is routed to you for review or approval, it may be possible to choose a new assigned user for the affected Sugar record without affecting the flow of the process. The administrator can enable or disable this option for each process definition, so it may be possible to reassign the Sugar record for one process but not another. If the option is enabled, "Change Assigned To User" will be available in the Actions menu on the process record view:

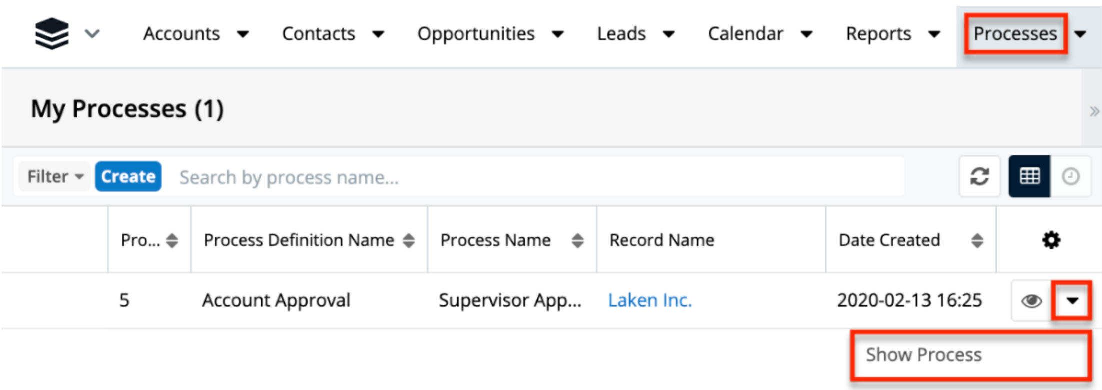


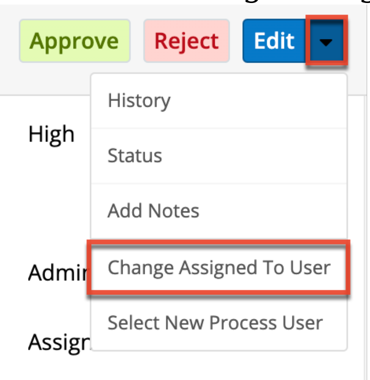
Follow these steps to designate a new assigned user:

1. Click on the hyperlinked process name in your Processes dashlet. Please note that the dashlet will not differentiate between Approval processes and Routed processes. The process type will become apparent on the next screen.

   Alternatively, navigate to Processes list view and choose "Show Process" from the Actions menu of the record:

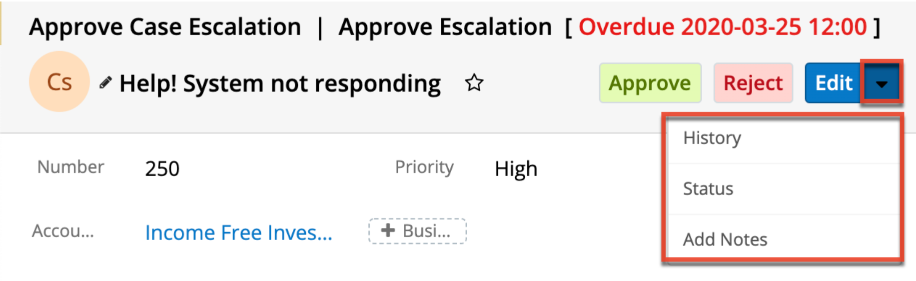
2. The process landing page is the record view of the affected Sugar record. **Note**: Legacy user-interface modules will display the record's edit view.
3. Click on the triangle next to the Edit button to reveal the Actions menu. Click on "Change Assigned To User".


Note: If "Change Assigned To User" is not displayed, then the administrator has not enabled reassignments for this type of process. Please contact the administrator and ask them to reassign it for you.
4. The "Change Assigned To User" window will appear:

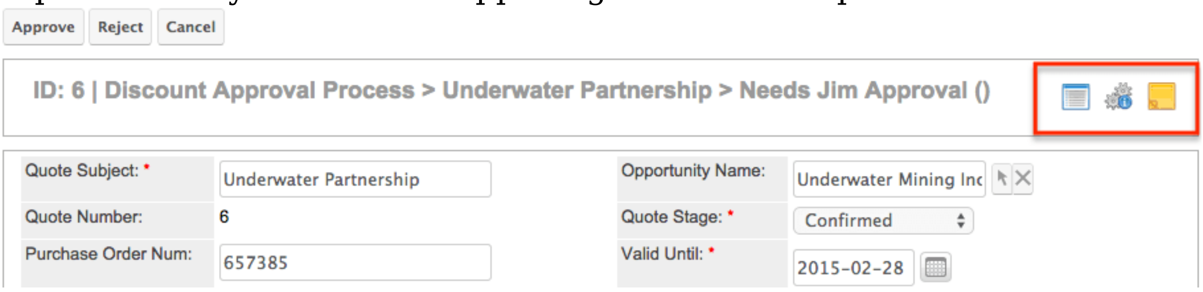

There are two options:
   - **User**: The user chosen here will become the "Assigned To" user of the related Sugar record. The administrator will have specified a Sugar team from which you may choose any member. No other users will be displayed in the User dropdown.
   - **Note**: As a best practice, insert an explanation of why you are choosing a new assigned user. The next process user will see your note when he or she clicks on "View Notes".
5. Click on "Save" to update the Sugar record. The page will reload to reflect the change. You can now execute the process as explained in either the Executing Approval Processes or Executing Routed Processes sections of this page.

Viewing Details About a Running Process

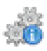
When executing a running process, there are three options available that will help you gain valuable insight into the past, present, and future state of the process: History, Show Notes, Show Status. These options are accessible via the Actions menu on the process record view. Click on the triangle to the right of the edit button to expand the Actions menu:



In processes targeting [legacy user-interface]() modules, these options are represented by icons in the upper right area of the process record view:



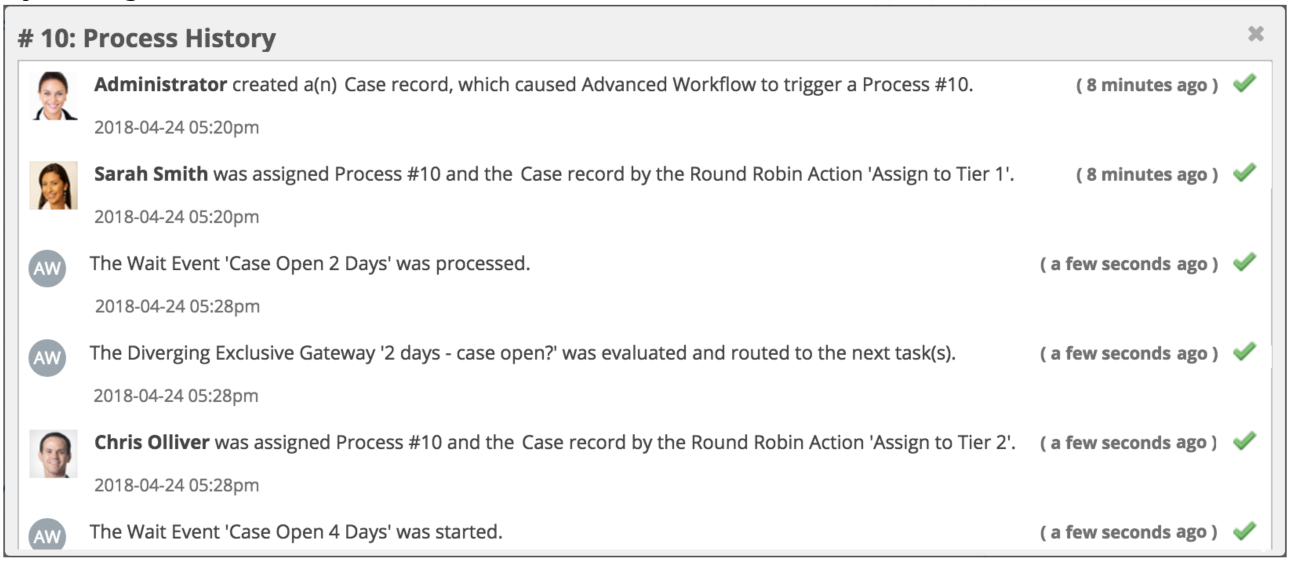
The three icons on a legacy record view represent the following actions:

Action	Icon	Description
[Show History]()		View the entire time-stamped history of all process transitions, user engagements, and automated occurrences that were executed by the SugarBPM engine.
[Show Notes]()		Read messages from users who have already engaged in the process and send messages to users who will engage in the process later.
[Show Status]()		Reveal an image of the process' visual design layout in a pop-up window. The image will reveal key information regarding the stages that have already been completed, the current stage of the

		process, and the stages that have yet to execute.

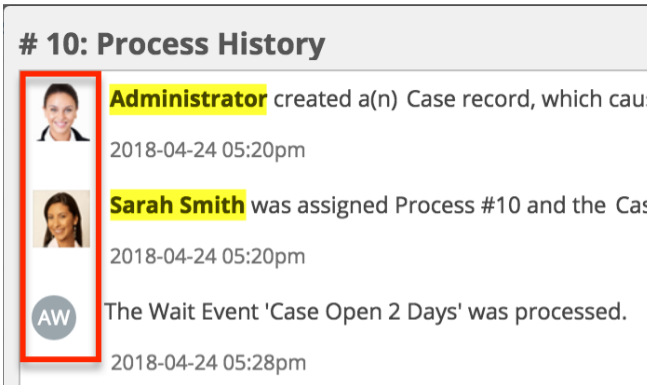
Viewing Process History

All process records retain a timeline of events that have occurred throughout the process. This timeline can be displayed in a popup window by the process user or by a SugarBPM administrator.

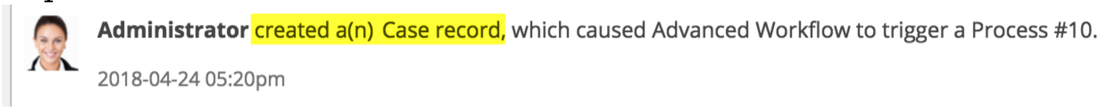


To review the entire time-stamped history of all transitions, user engagements, and automated occurrences for a particular process, follow these steps:

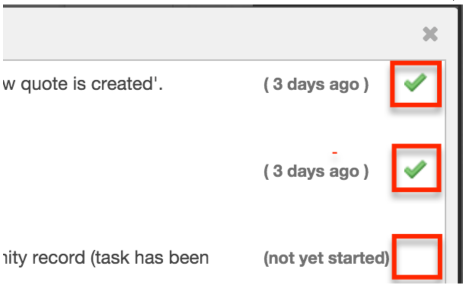
1. From the Processes dashlet, click on the hyperlinked process name to view the process record view.
2. Click on the triangle next to the Edit button to reveal the Actions menu, and then click "History". In legacy user-interface modules, click on the History icon in the corner of the screen. A popup window will appear over the current page outlining the transition history of the current process. Each process History entry will include the following components:
    - The profile image and name of the process user who executed the transition
      Note: Automated events will be executed by the SugarBPM (AW) engine.



- Explanation of the transition that occurred:



- Transition status indicator (checkmark):



  - Checkmark □: The action has been executed.
  - No Checkmark: The action has not yet been executed.

3. Click on the X in the corner of the window to return to the process record view.

Viewing Process Notes

A process user who is engaged in a process activity can add notes for people who will engage with the process later in its flow. When a different user engages in that same process later, he can see the earlier user notes and choose to add his own. Users who executed process activities at the beginning will not see the notes added by subsequent process users unless the process is routed back to them for review or approval later.

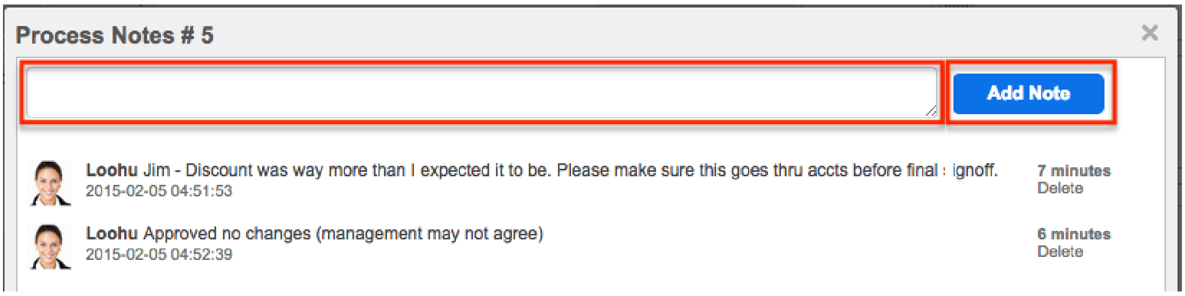
Note: Admin users can see all notes and add notes to any running process at any time from the Process Management page.

To create a note and view process notes from other users, follow these steps:

1. From the Processes dashlet, click on the hyperlinked process name to view the process record view.
2. Click on the triangle next to the Edit button to reveal the Actions menu, and then click "Show Notes".

Note: In legacy user-interface modules, click on the Notes icon in the corner of the screen.

3. A popup window will appear over the current page that displays time-stamped notes from earlier users of the current process.
4. At the top of the window, there is also a composition area where you can add more notes. Simply type a message in the empty field and then click on "Add Note" to add it to the Notes window.



5. Click on the X in the corner of the window to return to the process' record view.

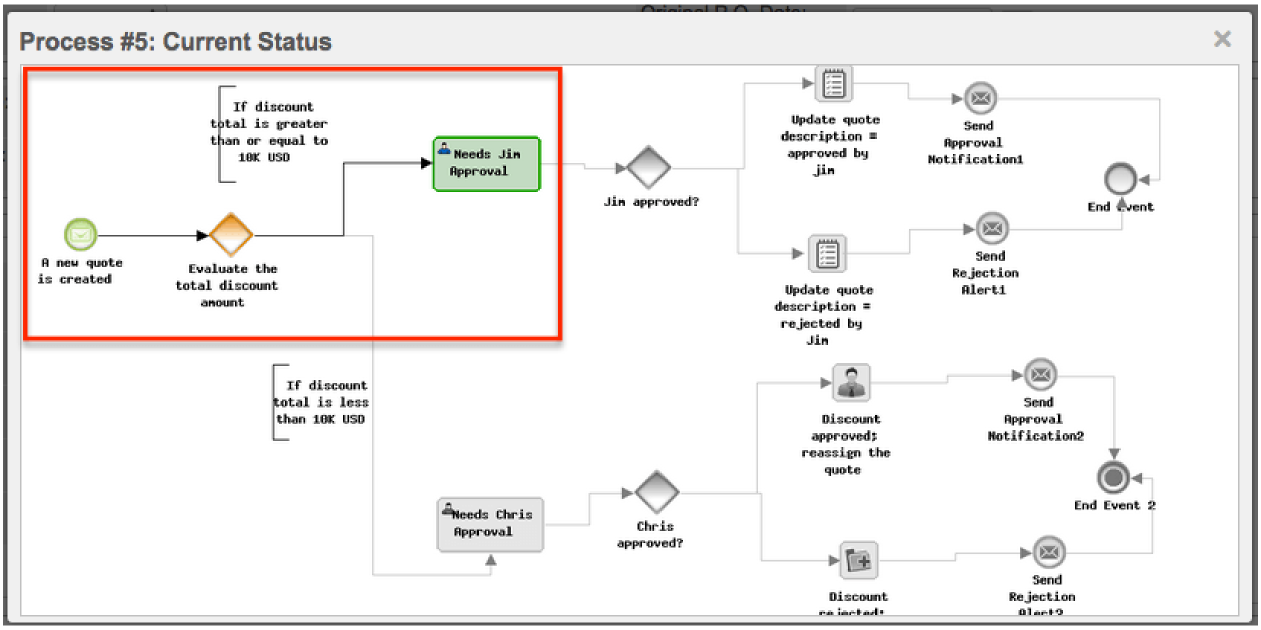
Every person that may be involved in a process will not see the process throughout its entire flow. Regular users can only see the process in list view when they have a record to approve, reject, or review. Therefore, only one regular user (non-admin) can see the notes at any given time. In other words, the notes will only be seen by users who approve/reject/review the process after the note is added.

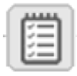
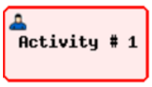
Previewing the Process Design

Users can view the progression of a process within the overall flow directly from the process' record view. Click on the triangle next to the Edit button to reveal the Actions menu, and then click "Show Process".

Note: In legacy user-interface modules, click the Status icon in the upper right corner.

The process' visual design layout will open in a pop-up window, providing key information regarding the stages that have already been completed, the current stage of the process, and the stages that have yet to execute. The executed and in-progress stages of the process will be displayed in color, while bypassed or not-yet-executed stages will be presented in a grayed-out style.



Visual Element	Example	Description
Colorized shapes		This element has been executed or is in progress.
Gray shapes		This element has been bypassed or occurs in the future.
Green-outlined activity		The activity is waiting for you (the viewing user) to respond.
Red-outlined activity		The activity is waiting for a user to respond, but not the viewing user.
Red glowing shape		This element is in progress.
Shape containing a small crossed-out circle		The process was terminated or canceled on this element.
Numeric value in parentheses		This element was triggered by multiple events concurrently. **Note**: This parenthetical notice may indicate that there is a flaw in the design of the process definition. Please review

		the conditions on the triggering event to eliminate the possibility of overlapping triggers.

Terminated vs. Cancelled Processes

The SugarBPM automatically terminates a process when the record related to the process' Start event is deleted. The associated process will be removed from the Processes dashlet and the process record will display "Terminated" in the Status column of the administrator's Process Management list view.

Cancelled processes, on the other hand, have been intentionally stopped by the administrator. The associated process will be removed from the Processes dashlet and the process record will display "Canceled" in the Status column of the administrator's Process Management list view.

Working With Sugar Modules

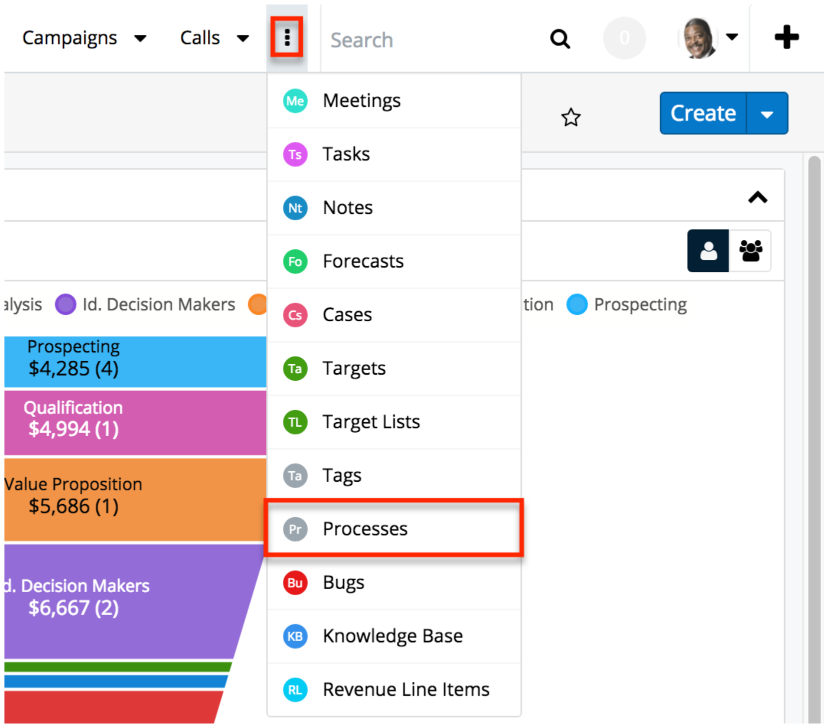
The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Process Menus

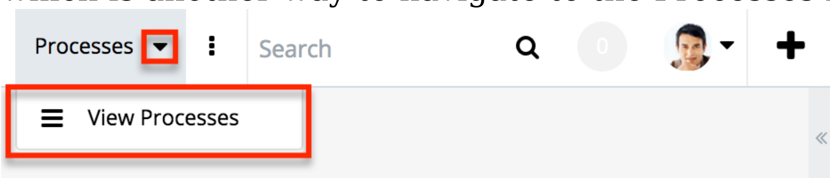
The Processes module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Process-specific functionality, within this page.

Module Tab Menu

The Processes module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs at the top of any Sugar screen. The additional modules will appear on the list and you can click "Processes" to access the list view.



From the Processes list view, click the triangle in the Processes tab to display the Actions menu. The module tab's Actions menu has one option, View Processes, which is another way to navigate to the Processes list view.

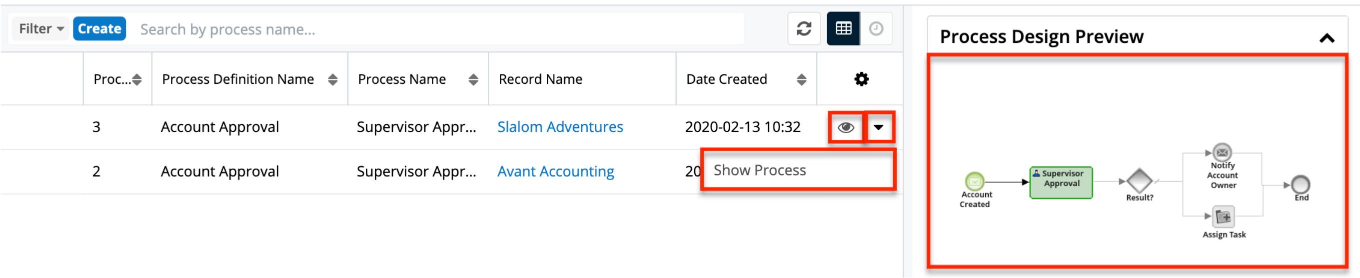


Administrators and users with developer-level role access may see additional options such as a link to the Process Management screen. For more information about options available to administrators and developers, please refer to the SugarBPM documentation in the Administration Guide.

For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to execute a running process directly from the list view by clicking "Show Process". This will direct the user to a landing page where they will be instructed to approve, reject, or resume (route) the current process. For more information about executing processes, please see the Executing Processes section of this page.



The list view's Record Actions menu allows you to perform the following operations:

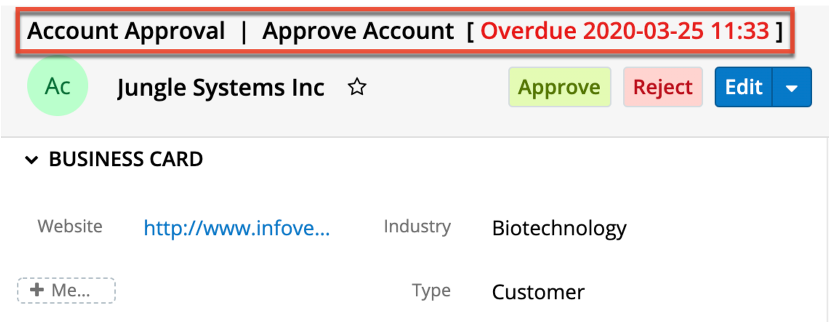
Menu Item	Description
Preview (Eye icon)	Preview the progression of this process in the intelligence pane.
Show Process	Navigate to the process' landing page to approve, reject, or resume (route) this process.

Record View Actions Menu

The Process record view displays the Sugar record that is awaiting action in full detail including its module name, fields, process buttons, and subpanels of related records. To access a process' record view, click on the process name in the Processes dashlet or select "Show Process" from the process record's list view Actions menu.

The process' Actions menu appears on the top right of the page and allows you to perform operations on the current record specific to its process type. To learn more about the three available Actions menus (approval, routed, and self-service), please refer to the corresponding Actions menu section under the Executing Processes section below.

In addition to a Processes-specific Actions menu, there are several process-specific elements added to the record view above the record's name and module icon.



From left to right across the top of the record view, the process record view displays the following information:

Menu Item	**Description**
Process Definition Name	The name of the process definition record that generated this process; For more information about Process Definitions, please refer to the Process Definitions documentation in the Administration Guide.
Process Name	The name that was given to the process definition's Activity element by the process owner.
Process Due Date	The date and time by which you should execute this process step. **Note**: If the administrator has not specified a due date, then no date will appear. If the due date occurs in the past, then the date will be preceded by the word "Overdue" in red text.

Common Views and Actions

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules.

Content Link	**Description**
Searching for Processes List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to list view search, which searches and filters within the Processes module.
Processes List View Total Record Count List View Search Column Reordering Column Resizing Column Sorting Column Selection More Processes Dashboards	The List View section walks through the many elements of the Processes List View layout, which contains a list of all running processes that require action (e.g., approve, reject, etc.) from the logged-in user. Unlike other Sidecar modules, you will only see processes in the list view if there is anything requiring your approval or review.

	While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Processes list view are described in the List View Record Actions Menu section of this page.
Processes Record View Favorite Designation Following Designation Next or Previous Record Actions Menu Show More Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Activity Stream Dashboards	The Process record view displays the Sugar record that is awaiting action in full detail including its module name, fields, activity stream, and subpanels of related records. For information about navigating these elements of a record, please refer to the User Interface links on the left or the relevant module page in the Application Guide. To access the Process record view, click on a process name on the Processes dashlet or select "Show Process" from the process record's list view Actions menu. There are several process-specific elements added to the standard record view, which are explained in the Approval Process Actions Menu, Routed Process Actions Menu, and Self-Service Actions Menu sections of this page. **Note**: Processes may affect Sidecar module records as well as legacy user-interface modules. For information on navigating the legacy user interface, please refer to the User Interface (Legacy) documentation.

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Data Privacy

Overview

The Data Privacy module allows users to record and take action on data privacy requests and events in Sugar. This module is one portion of a feature set aimed at supporting your ability to carry out your organization's data privacy policies. Sugar's Data Privacy Guide provides information which spans the entire data privacy feature set and presents consolidated information and instructions for leveraging these tools to accomplish your organization's data privacy procedures. This Data Privacy Guide will describe these enhancements, the configuration steps an admin must complete before users can access the new functionality, as well as provide guidance for end users and Data Privacy Managers. This documentation will instead focus on the mechanics of using the module including its fields, options, menus, and how to perform common actions on data privacy records.

Data Privacy Fields

The Data Privacy module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role 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 data privacy record.
Business Hours to Resolution [1]	The calculated duration in business hours from the moment the data privacy record is created until an admin or a user in the Data Privacy Manager role clicks the "Complete" or "Reject" buttons at the top of the record.
Business Purposes Consented for	Available when Type is set to "Consent to Process" or "Withdraw Consent, the various business purposes the individual is being asked to consent to or for which the individual is withdrawing consent. For more information about tracking consent, refer to the Data Privacy Guide.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the

	date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
Date Closed	User-populated recording of when the data privacy record was rejected or completed.
Date Created	The date the data privacy record was created.
Date Modified	The date the data privacy record was last modified.
Date Opened	The date the data privacy record was created. This field will default to today's date upon creation but can be modified by users if the actual request date differs from the creation date of the record.
Description	A description or other information about the data privacy record.
Due Date	For request types with time limits, the date by which the request must be completed.
Follow Up Date	The internal follow-up date by which the data privacy request should be acted upon.
Hours to Resolution [1]	The calculated duration in calendar hours from the moment the data privacy record is created until an admin or a user in the Data Privacy Manager role clicks the "Complete" or "Reject" buttons at the top of the record.
Integration Sync ID	The sync key field used by external integrations to identify Sugar records in the external application. See the Integrate REST API endpoints in the Developer Guide for more details on how to use this field.
Number	An automatically incremented number, uneditable by users, which identifies each data privacy record.

Priority	The relative importance of the request or data privacy activity.
Requested By	For request types, the individual who made the request to your organization.
Resolution	Freeform field to record how the request or activity was handled.
Source	How the request or data privacy need originated (e.g., "Email from subject", "Gaining consent per policy", etc.).
Status	The status of the record which is automatically changed from "Open" to "Rejected" or "Completed" when an admin or a user in the Data Privacy Manager role clicks the "Complete" or "Reject" buttons at the top of the record.
Subject	A brief description of the request of activity that appears at the top of the record.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports. **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the data privacy record.
Type	The type of request or activity being handled in this record. For more information, refer to the Data Privacy Types section below.
Work Log	Free form field to add activities and notable events while working on the request or activity.

[1] This field's value is only visible to Sugar Serve and Sugar Sell users; when this field appears on layouts, users without a supported license type will see a placeholder containing the text "License Required" instead of the field's value. See the User Management page for more details on license types.

Data Privacy Types

The Data Privacy module includes a Type field that captures the nature of the privacy event or request. You may wish to add, edit, or remove Type field values in order to match the kinds of activities and requests you will need to process and record, according to your organization's needs.

Three of the out-of-the-box Type values enable additional functionality in the Data Privacy module. You can edit their display labels, but the Item Name portions of the following options must remain unchanged in order to retain the full capabilities of the module:

Item Name*	**Display Label**	**Functionality Enabled**
Request to Erase Information	Request to Erase Information	Allows users in the Data Privacy Manager role to permanently erase personal information fields on records related to the data privacy record.
Consent to Process	Consent to Process	Enables the "Business Purposes Consented for" field on the data privacy record.
Withdraw Consent	Withdraw Consent	Enables the "Business Purposes Consented for" field on the data privacy record.

* The item names cannot be changed.

For more information about modifying the available type values, refer to the Data Privacy Guide.

Managing Data Privacy in Sugar

The Data Privacy module is one portion of a feature set aimed at supporting your ability to carry out your organization's data privacy policies. Sugar's Data Privacy Guide provides information that spans the entire data privacy feature set and presents consolidated information and instructions for leveraging these tools to accomplish your organization's data privacy procedures. This guide will describe these enhancements, the configuration steps an admin must complete before users can access the new functionality, as well as provide guidance for end users and Data Privacy Managers.

Working With Sugar Modules

While the Data Privacy module has some features that only apply to data privacy records, it also uses the Sidecar user interface that most Sugar modules are based on. The following sections detail menus, views, and actions common to Sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Data Privacy Menus

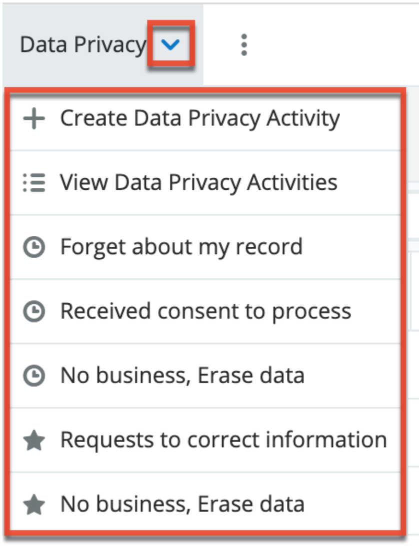
The Data Privacy module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Data Privacy-specific functionality, within this page.

Module Tab Menus

The Data Privacy 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 with the remaining displayed modules 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.

Note: By default, the Data Privacy module is hidden in Sugar and the system administrator must enable the module via Admin > Display Modules and Subpanels. For more information on displaying modules in Sugar, please refer to the Developer Tools documentation in the Administration Guide.

Click the tab to access the Data Privacy list view. You may also click the triangle in the Data Privacy module tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important operations within the module. The Recently Viewed menu displays the list of data privacy activities you most recently viewed. The Favorites menu displays the list of data privacy activities you most recently marked as favorites.



The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Data Privacy Activity	Opens the record view layout to create a new data privacy activity.
View Data Privacy Activities	Opens the list view layout to search and display data privacy activities.

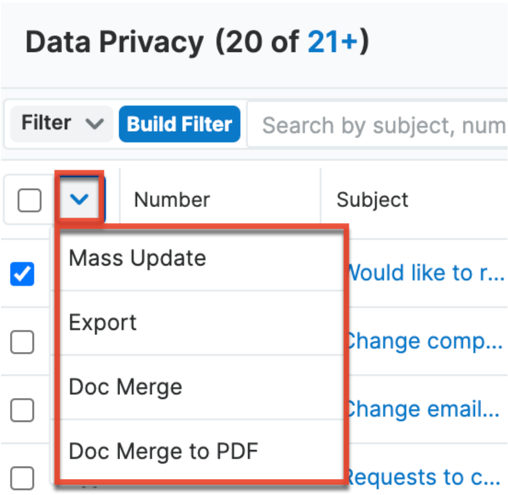
For more information on module tab menus including reasons a module may not be included in the menu, see the User Interface documentation.

List View Menus

The Data Privacy list view displays all data privacy records and allows for searching and filtering to locate specific data privacy activities. You can view the basic details of each record within the field columns of the list view or click a data privacy activity's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual data privacy activities or click the checkbox in the list header to select all records displayed on the current set of list view results.

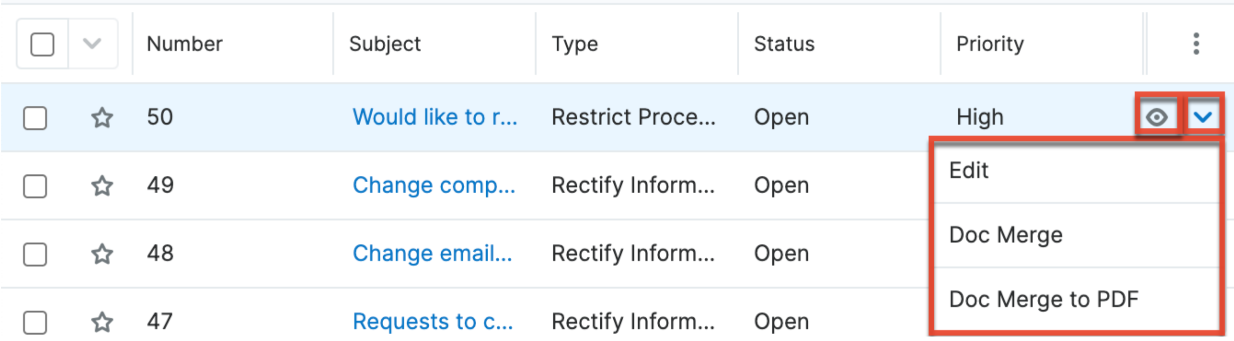


The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more data privacy records at a time.
Export	Export one or more data privacy records to a CSV file.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to perform actions on the individual data privacy record directly from the list view.

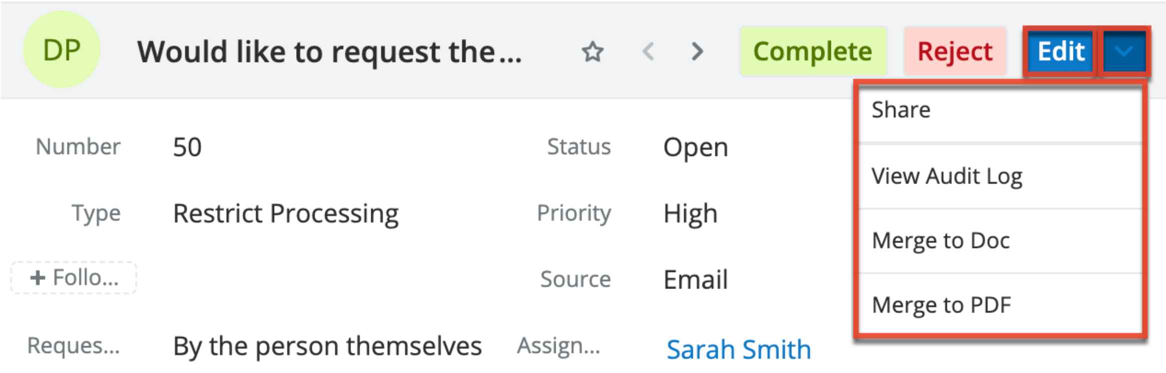


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this data privacy in the intelligence pane.
Edit	Edit this data privacy.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Record View Actions Menu

The Data Privacy record view displays a single data privacy in full detail including its fields and subpanels of related records. To access a data privacy's record view, simply click a hyperlinked data privacy name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this data privacy.
Share	Share a link to this data privacy via email.
View Audit Log	View a record of changes to this data privacy.
Merge to Doc	Select or create a DOCX template to merge record data into documents that will be accessible in the Doc Merge widget.
Merge to PDF	Select or create a DOCX, XLSX, or PPTX template to merge record data into PDF documents that will be accessible in the Doc Merge widget.

Common Views and Actions

In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to data privacy.

General Instructions for Working With Sugar Modules	Data-Privacy-Specific Instructions
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Data-Privacy-specific help exists for each topic, use the links below to navigate to sections of the current page.
Creating Records	

Viewing Records	
Searching for Records	
List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	
Editing Records	
Deleting Records	
Exporting Records	
Viewing Record Audit Logs	
Favoriting Records	
Following Records	
Sharing Records	

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Employees

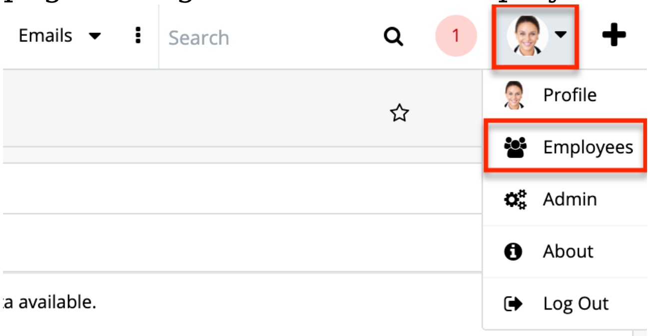
Overview

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 your profile icon on the upper right of any page in Sugar then select "Employees" in the user menu.



Employee Fields

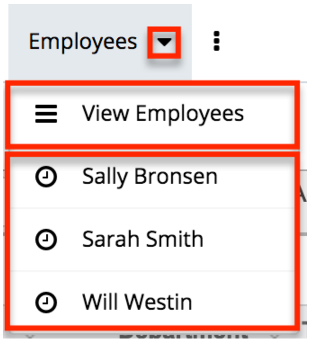
The Employees module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Users with administrator or developer access have the ability to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

Field	Description
City	The city of the employee's address.
Country	The country of the employee's address.
Department	The department where this employee works.
Email Address	The employee's email address.
Employee Status	The employee's employment status in the organization, either: Active, Terminated, or Leave of Absence.
Fax	The employee's fax number.
First Name	The employee's first name.
Home Phone	The employee's home phone number.
IM Name	The employee's instant message screen name.
IM Type	The employee's instant message client type.
Last Name	The employee's last name.
Mobile	The employee's mobile phone number.

Notes	A description or other information about this employee.
Office Phone	The employee's office phone number and extension.
Other	An additional phone number for the employee.
Picture	A picture, headshot, or identifying image of the employee.
Primary Address	The number and street of the employee's address.
Postal Code	The postal code of the employee's address.
Reports to	This field can be related to the Sugar user who is the employee's supervisor.
State	The state of the employee's address.
Title	The employee's job title.

Employees Module Tab

The Employees module tab can be accessed by clicking your profile icon and selecting "Employees" in the user menu. Once in the Employees list view, you can click the triangle in the Employees module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of employees you last viewed in the module.



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 on the top right side of Sugar.

Viewing Via List View

The Employees list view displays all employee records meeting the current search criteria. To access the list view, simply click the Employees option under your user name on the module tab bar. While list view shows key employee fields, you can click the employee's name to open the record in detail view. For more information on viewing employees via list view, please refer to the Employees List View section of this documentation.

Viewing Via Detail View

The Employees detail view displays thorough employee information by showing all employee fields. The detail view can be reached by clicking an employee record's link from the Employees list view. For more information on viewing employees via detail view, please refer to the Employees Detail View section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which employees you have recently viewed. Click the triangle in the Employees module tab to see a list of the 3 records you most recently viewed in the module. Clicking the record's name (e.g., Will Westin) within the list will open the record 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.

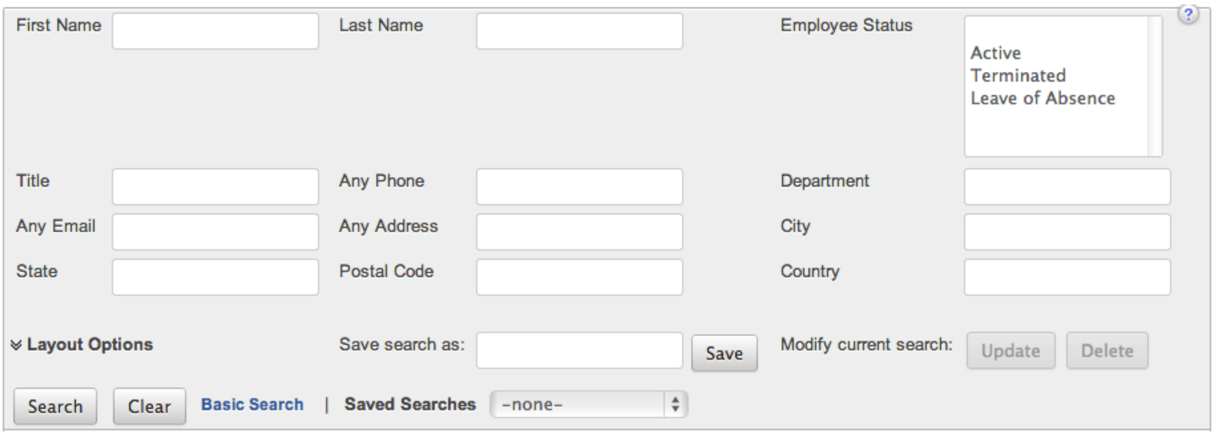
Administrators can configure what fields appear on the Employees Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration Guide.

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 on the Employees Basic Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration Guide.

Employees List View

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

You have the option to change what fields are displayed in 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.

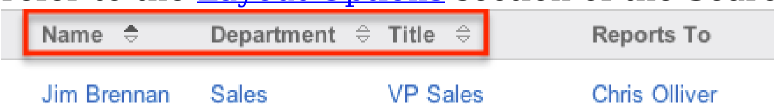
Pagination

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. The Shifts and Shifts Exceptions subpanels are displayed at the bottom showing the shifts and shift exceptions to which the user is related. They allow you to view the shifts and the exceptions to these shifts that a user has so that you can understand their work schedule and their availability to be round-robin assigned records in SugarBPM. To update an employee's work schedule, click the relevant shift or shift exception to open its record view and add or remove the user in the Users subpanel. See the Shifts and the SugarBPM documentation for more details.

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.

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Mobile Browser

Sugar can be accessed via browsers on mobile devices (i.e., Android, iOS) as a means of working with your Sugar instance without installing the Sugar mobile app. To access your Sugar instance via browsers in a mobile view, simply enter your instance URL and append /?mobile=1 to the end of the URL as follows: https://example.sugarondemand.com/?mobile=1.

For more information on navigating and utilizing your Sugar instance in a mobile view, please refer to the Sugar Mobile User Guide for your specific mobile device (i.e., Android, iOS).

Note: Please be aware that some features covered in the Sugar Mobile user guides may be unavailable in the mobile browser view.

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