Sugar Ultimate 6.3 Application Guide

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Preface

Overview

Welcome to Sugar Ultimate, a commercial open source Customer Relationship Management (CRM) application.

The Sugar application

Sugar enables organizations to organize, populate, and maintain information efficiently on all aspects of their customer relationships. It provides integrated management of corporate information on customer accounts and contacts, sales leads and opportunities, plus activities such as calls, meetings, and assigned tasks. The system seamlessly blends all the functions required to manage information on many aspects of your business into an intuitive and user-friendly graphical interface.

The system also offers a graphical dashboard to track the sales pipeline, the most successful lead sources, and the month-by-month outcomes for opportunities in the pipeline.

The Sugar community

Sugar is based on an open source project, and therefore, advances quickly through the development and contribution of new features by its supporting community.

Sugar Ultimate is a commercially licensed and supported version of the Sugar software that includes many features not released in the Sugar Community Edition.

Welcome to the community!

Audience

This guide is designed for users and administrators who are new to Sugar, or to CRM and web-based applications.

Feature overview

Sugar consists of modules, each of which represents a specific functional aspect of CRM such as Accounts, Activities, Leads, and Opportunities. For example, the Accounts module enables you to create and manage customer accounts, and the Activities module enables you to create and manage activities related to accounts, opportunities, etc. These modules are designed to help you manage customer accounts through each step of their life cycle, starting with generating and qualifying leads to customer support and resolving reported bugs. Many of these steps are interrelated and as a result, each module displays related information. For example, when you view the details of a particular account, the system also displays the related contacts, activities, opportunities, and bugs. You can view, edit, and create this information.

As an administrator, you have the power to implement access control for these modules. You can customize the look and feel of Sugar across your organization. You can even create new modules if needed.

Core features

Sales Force Automation

- Lead, Contact, and Opportunity management to pursue new business, share sales information, track deal progress, and record deal-related interactions
- Account management capabilities to provide a single view of customers across products, geographies, and status
- Automated Quote and Contract management functionality to generate accurate quotes with support for multiple line items, currencies, and tax codes
- Sales forecasting and pipeline analysis to give sales representatives and managers the ability to generate accurate forecasts based on sales data in Sugar
- Sugar Dashboards to provide real-time information about leads, opportunities, and accounts
- Sugar Plug-ins for Microsoft Office to integrate your CRM data with Microsoft's leading productivity tools
- Sugar Mobile for iPhone, a native Sugar application for iPhone, to access contacts, opportunities, accounts, and appointments in Sugar Ultimate, Sugar Enterprise, Sugar Corporate, and Sugar Professional while logging calls and updating customer accounts

- Sugar Mobile for Android, a native Sugar application for Android devices, to access contacts, opportunities, accounts, and appointments in Sugar Ultimate, Sugar Enterprise, Sugar Corporate, and Sugar Professional while logging calls and updating customer accounts
- Sugar Mobile to access mobile functionality through any standards-based web browser

Marketing Automation

- Lead management for tracking and cultivating new leads
- Email marketing for touching prospects and customers with relevant offers
- Campaign management for tracking campaigns across multiple channels
- Campaign Wizard to walk users through the process of gathering information such as the marketing channel, targets, and budget needed to execute a campaign effectively
- Campaign reporting to analyze the effectiveness of marketing activities
- Web-to-Lead forms to directly import campaign responses into Sugar and capture leads

Customer Support

- Case management to centralize the service history of your customers and monitor how cases are handled
- Bug tracking to identify, prioritize, and resolve customer issues
- Customer self-service portal to enable organizations to provide self-service capabilities to customers and prospects for key marketing, sales, and support activities
- Knowledge Base to help organizations manage and share structured and unstructured information

Collaboration

- Shared Email and calendar with integration to Microsoft Outlook
- Activity management for emails, tasks, calls, and meetings
- Content syndication to consolidate third-party information sources
- Sugar mobile functionality for wireless and PDA access for employees to work when they are away from the office
- Sugar Offline Client to enable employees who work offline to update Sugar automatically when they return to the network

Reporting

- Reporting across all Sugar modules
- Real-time updates based on existing reports
- Customizable dashboards to show only the most important information

Administration

- Edit user settings, views, and layouts quickly in a single location

- Define how information flows through Sugar (workflow management) and the actions users can take with information (access control)
- Customize the application in Studio to meets the exact needs of your organization
- Create custom modules in Module Builder

Getting Started

Overview

This guide assumes that you have the required resources to access the Sugar application and you are familiar with how to use them. Contact your system administrator for issues and concerns.

Prerequisites

Ensure that you have the following installed and configured on your machine before using Sugar:

- A web browser application on your computer. For information on the supported browsers, see Supported Platform Components for Sugar.
- JavaScript support and cookie support enabled within the web browser used to access Sugar.
- Network access to a server that is running the Sugar software.

Your system or network administrator can provide you with a web address (URL) from which the system can be accessed.

Note: For detailed information on supported versions for all the Sugar components, see Downloading and installing Sugar.

Web browser window controls

Sugar dynamically generates the HTML pages that the web browser displays when you click certain buttons on a web page. Sugar may not display these pages if you use the browser's Back and Forward buttons. It is recommended that you use the Actions menu on the module tab to navigate back and forth in the application.

Note: Sugar is designed for a minimum 1024x768-pixel screen display resolution.

Accessing Sugar and setting your User Preferences

Use a supported web browser to access the Sugar application. You will need a user account and login credentials to log into the application. The System Administrator must provide you with your user name and password. You can change your password after you log into Sugar.

Troubleshooting tips

Perform the tasks listed below if you cannot log into Sugar:

- Verify that the username and password are correct, including any upper-case letters
- Verify with your system administrator that you have the correct username and password
- Contact your system administrator to ensure that your account has not been disabled

The Forgot Password? link displays in the Log In window if the Administrator has enabled this feature. Click this link if you cannot remember your password, enter your username and password in the relevant fields, and click Submit. Sugar will send you a link to the page where you can reset your password. Contact the administrator for a new password if this link is not available to you.

Available Languages

The default language in Sugar is US English. In addition, Sugar provides the following languages:

- Bulgarian
- Catalan
- Chinese
- Croatian
- Czech
- Danish
- Dutch
- English (UK)
- Estonian
- French
- German
- Hebrew
- Hungarian
- Italian
- Japanese
- Lithuanian
- Norwegian
- Polish
- Portuguese
- Romanian
- Russian
- Spanish
- Swedish
- Turkish

Individual users can select a different language from the **Language** drop-down field in the **Log In** page. The administrator can change the default language for the entire organization.

Administrators can install additional languages, if necessary. Language packs are available at http://www.sugarforge.org.

Configuring User Preferences

To access Sugar and configure your User Preferences

1. Enter the Sugar URL in the address bar of your web browser.

This displays the Sugar Log In page with fields to enter your Sugar credentials. The Sugar Log In page also displays a Language drop-down field from which you can select the language that you want to display in Sugar.
For information on using the Admin Wizard that displays when you login as an administrator, see Configuring Settings in Sugar.

2. Enter your username and password.

3. Click Log In.

This displays the User Wizard if you are a regular user. The Sugar User Wizard guides you through the process of entering your Profile information and Locale settings in Sugar. You can change your profile information and locale settings in the Wizard if the administrator has already configured these settings for you. You can also change them from the User Preferences page after you log into Sugar.
The administrator also configures a default SMTP email server to send out email notifications and alerts. An Email Settings tab displays in the Wizard if the administrator has enabled users to use this email server for outgoing emails. Specify your username and password in the Email Settings tab to send out emails from that email server.
For information on user preferences, see Editing your User Preferences.

4. Click Next to navigate from one page to the next; make the desired changes to your settings, and click Finish to exit the wizard.

This displays your Sugar Home page. You can now begin using the Sugar application. For information on using your Home page, see Home Module.

User session rules

Sugar has set the following rules for user sessions for security purposes:

- You cannot log into a Sugar instance simultaneously using the same account from two different machines or browsers.
- Two different users cannot log into a Sugar instance separately with two simultaneous sessions using the same username. When you are logged into a Sugar instance, if another person logs in using your credentials, you will be automatically logged out. Hence, to avoid conflict, it is recommended that you do not share your credentials with other users.

Sugar enables you to do the following:

- Concurrently log into Sugar through the Sugar Plug-in for Outlook (or other plug-ins and extensions using Web Service APIs) when logged into Sugar through a browser
- Open an unlimited number of pages of a Sugar instance within a single browser

Editing your User Preferences

When you log into Sugar, your name displays on the top right corner of the page. You can click it to view and edit your default settings. You can also view the list of modules you are allowed to access and your access permissions, such as View, Edit, and Delete, for each module. You can edit some of these settings to suit your requirements, such as the Sugar modules that you want to view when you login. You cannot change your level of access to modules or view modules that you are not allowed to access.

User Profile

This tab displays your profile information such as your full name, your Sugar username, phone number, address, title, and email address. It also displays the teams that you belong to.

Employee Information

Employee Information is entered by the administrator and displays information such as your title, your supervisor's name, and your contact information.

Email Settings

The Email Settings section displays your email address and email client. The system administrator has the ability to setup one or more email addresses and specify your primary email address for automated responses to emails. For information on editing this information, see To change your email settings.
You can send emails automatically if the administrator has setup an SMTP server and has enabled you to use the associated mail account to send emails. Fields for the SMTP username and password are displayed if the administrator has not enabled you to use the mail account. Enter the username and password for your mail account to send out emails using this SMTP server. For information on specifying another SMTP server from the Emails module see **Configuring Email Settings**.

Default Teams

Use this panel to view the teams to which the Systems Administrator has assigned you. You cannot edit your team memberships.

Password

Use the Password tab to change your password. For more information on changing your password, see **Managing your password**.

Themes

Use the Themes tab to change the theme of your Sugar interface. For more information on changing your theme, see Managing themes.

Advanced

The Advanced tab displays the following sections:

User Settings

In this section, you can change the default settings for the following:
Export Delimiter. This is the character that will be used to separate field values when you export data from Sugar. The default is a comma (,).
Import/Export Character Set. Select a character set from this drop-down list to export and import data and generate Vcards.
The administrator sets the default export settings such as the delimiter used to separate data in export files and the default character set used to import and export data from Sugar. You can override the administrator's settings with your own. The default character set to export data is UTF-8. Specify the appropriate character encoding for your locale if your locale is not US or Western Europe. This ensures that the character set used by the Sugar system to create the exported file is mapped to the correct character set on your machine. For example, MS Windows uses SJIS in Japan. Users in this locale need to select SJIS as the default export character set instead of UTF-8. This character encoding setting is

also used when importing data into Sugar.To generate Quote PDFs, ensure that you select the appropriate character set for the chosen language.
Show Full Names. Select this option to display your full name in My Activity Stream and in the Assigned to field in records.
Offline Client Status. Only the system administrator can change this status.
Notify on Assignment. When you enable this option, you will receive an email notification when a record from any of the following modules is assigned to you:
Accounts
Contacts
Opportunities
Leads
Meetings
Calls
Tasks
Cases
Bugs
Quotas
Campaigns
Projects
Reminders. Select a default time interval as a reminder for calls and meetings from the **Reminders** drop-down list.
Mail Merge. You can enable this option to merge data such as names and addresses from Sugar with form letter templates created in Word if you are using Sugar Plug-in for Word. This needs to be enabled by the System Administrator.
Default Teams. Click Select to choose a team as your primary team. You can be a member of multiple teams. Click Add to add a new field and then click Select to choose the team to specify a secondary team.
No Opportunities. Select this option if you are not involved in sales activities and do not need to be assigned opportunities.
You can also assign yourself to the role of a Group User through the **User Management** option on the **Administration Home** page if you are an administrator.

Layout Options

You can change the default settings for the following in this section:
Grouped Modules. Select this checkbox to view module tabs in the navigation bar, based on pre-defined groups. All modules with appear in the navigation bar if this feature is not selected.
Edit Tabs. Enables you to hide modules that you do not require. Move the module from the Display Tabs list to the Hide Tabs list using the right arrow to hide the module. Use the left arrow to move a module name from the Hide Tabs list to the Display Tabs list to display the module. These settings can be applied globally by the administrator.
You can change the order in which module tabs display in Sugar. Select the module in the Display Tabs list and click the Up arrow to move up a module; click the Down arrow to move down the module.
Number of tabs.Enter a value to specify the maximum number of module tabs to display at the top of page before the overflow menu, indicated by a down arrow, appears.
Subpanel Tabs. Enable this option to group subpanels into tabs in the Detail View of records.

Locale Settings

In this section, you can change the default settings for the following:
Date Format. Select a format for date stamps from this drop-down list. The default is mm/dd/yyyy.
Time Format. Select a format for time stamps from this drop-down list. The default is in hours.
Time Zone. Set your time zone.

Name Display Format. Specify display of names in records. The default is Salutation, First Name, and Last Name (sfl).
Sugar uses the specified Name Display Format in **Quick Search** to find related records when you enter a character in the Related to field within a record, such as a Call or a Meeting. When you type a character in the field, the system performs a quick search of possible values and presents a list of values starting with that character. If the Name Display Format specifies "s f l"(Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting with "A". Similarly, if the Name display format specifies "s l f", then the system displays last names starting with "A".
User Wizard Prompt. This is available to users with administrator privileges only. Select this to enable new users to go through the New User Wizard during first login.
Currency. Select the currency to use in records from this drop-down list. The default is US Dollar.
Currency Significant Digits. Select the number of digits that display after a decimal from this drop-down list.
1000s separator. Enter the character used to separate thousands. The default is comma (,).
Decimal Symbol. Specify the decimal symbol to use. The default is a period (.).

PDF Settings

You can change the default font settings to print PDFs of reports, quotes, and projects in this section.
Font for Header and Body. Select a font for the header and body of PDF documents from this drop-down list.
Main Font Size. Enter a number to specify the font size in the PDF header.
Font for Footer. Select a font for the footer in PDF documents from this drop-down list.
Data Font Size. Enter a number to change the default font size of the PDF body.
Calendar Options
Publish Key. Enter a key number to publish available/busy information from an external calendar application, such as Microsoft Outlook. Provide this key to users of other calendar applications if they want to view your calendar. Sugar allows access to your calendar to individuals who can provide this key.

External Accounts

The following Connectors are available in Sugar:

- Google Docs — Upload to and access documents in Google Docs within Sugar
- Cisco WebEx meetings — Attend and manage online meetings with Cisco WebEx within Sugar
- GoToMeeting meetings — Attend and manage online meetings with GoToMeeting within Sugar
- IBM LotusLive — Access IBM LotusLive meetings and documents within Sugar
- Twitter — Receive constant updates on client status, product comments and customers' tweets within Sugar
- Facebook — View Facebook feeds within My Activity Stream Dashlet in Sugar

- LinkedIn— View your LinkedIn contacts at a specific company (Sugar matches the company name in a Sugar field)
- InsideView — View key sales intelligence directly in Lead, Account, Contact and Opportunity records, and get relevant company information, contacts, news, and social media insights within Sugar

You can access the above external applications within Sugar if you have an existing account with the application. For all Connectors except LinkedIn and InsideView, this feature is available out of the box but needs to be enabled by the administrator.

Note: You do not need to have an InsideView account. InsideView identifies user accounts by their email addresses. If you have an existing account with InsideView, you are immediately connected to the their service. You can use their free trial version if you do not have an account with InsideView. For more information, see Accessing InsideView.
Also, unlike the other Connectors, LinkedIn and InsideView are enabled by default in all upgrades and new installs. Request your administrator to disable InsideView, if your organization does not want to use it.

You also need to enable the following applications before you can access them in Sugar: Google Docs, Cisco WebEx, and GoToMeeting.
Follow the steps listed below to enable Google Docs, Cisco WebEx, or GoToMeeting in Sugar:

1. Click your username on the upper right hand corner of any Sugar page.

This opens the Edit User page.

2. Click the External Accounts tab in the Edit User page and click Create.

3. Select the required application from the Application drop-down list, populate all other mandatory fields indicated by a red asterisk, and click Save.

To verify that your external account has been successfully added to your Sugar profile, navigate to your User page and click the External Accounts tab. You should be able to see the external account among the listed applications.
For IBM LotusLive, the login expires after 10 hours. You need to re-enter your login information to access the application from Sugar.
For Google, GoToMeeting, IBM LotusLive, and WebEx, you can have only one account of the application with each Sugar instance. For example, if you try to create an additional Google account in the External Accounts section, Sugar deletes the previous account and adds the new account with the following message:
An account for this application already exists. We have reinstated the existing account.

Access

This tab displays the module access permissions that the administrator has granted you to perform specific actions such as editing and deleting records. The administrator can enable or disable access to any Sugar module. You cannot edit these settings.

Roles

Scroll down the Access page to view roles that the system administrator has assigned to you. You cannot edit your roles.

Downloads

This tab displays links to Sugar Plugins for Microsoft Outlook, Microsoft Word, and Microsoft Excel. Click the appropriate link to download a plug-in to your local machine. You can then install it on your machine. Click Reset User Preferences and OK to revert to your default settings after saving any changes that you made.
Similarly, you can restore the default settings by clicking the **Reset Homepage** after customizing your Home Page.

Editing Email Settings

You can view and edit your default email address. The default SMTP email server is used to send emails from Sugar if this has been enabled by the administrator.
To change your email settings

1. Click your name on the top right corner of the Sugar page.

This displays the **Users** module.

2. Scroll down to the **Email Settings** sub-panel on the User Profile tab.

3. Overwrite existing email address with new email address and click **Save** to change an existing email address.

Click the plus (+) sign, populate new field, and click **Save** to add another email address.
You can add multiple email addresses. The first email address that you enter is selected as the primary email address by default. Click the Primary button corresponding to the email address that you want to specify as the new primary address to select a different email address as the primary address.
Select the Reply-to radio button corresponding to the email address that you want to specify as the new reply-to address to specify a different email address for automated responses to emails.

4. Select the email client of your choice from the **Email Client** drop-down list. Select Sugar Email Client to send emails using the default email client that the administrator has configured, or External Email Client to use an external email client such as Microsoft Outlook.

5. Email Provider. This field displays the email server address if you selected External Email Client.

6. Enter the SMTP user name and password for your email account if you selected Sugar Email Client. (You will be using the administrator-configured SMTP server to send out emails).

7. Click Send Test Email to send out a test email to ensure that the settings are correct.

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

Managing your password

You will be provided with a temporary password when the administrator initially grants you access to Sugar. Change this password after you log into Sugar. Ensure that you choose a password that is easy for you to remember, but difficult for others to guess. You can change your password at any time. For security reasons, it is recommended that you change your password periodically.

To change the password

1. Log into Sugar and click your name on the top right corner of any Sugar page.

This displays the Edit User page.

2. Click the Password tab.

If there are password rules, they will display in this section. Your new password must adhere to these rules. Each rule will be marked with a red cross. When you enter your password, as each rule is met, the cross will be replaced with a green checkmark. You can save your new password only after all the rules have checkmarks.

3. Input current and new passwords in the relevant fields and click **Save**.

Resetting a forgotten password

The **Forgot Password?** link displays in the **Log In** window if the administrator has enabled the Forgotten Password feature.
Follow the steps listed below to request for a new password if you have forgotten your existing one:

1. Click the **Forgot Password?** link in the Sugar **Log In** window.

2. Input relevant information in the **User Name** and **Email Address** fields and click **Submit**.

This displays a message confirming that your request has been submitted. You will also receive an email with a link to access thePassword Resetpage. Populate fields with required information and click **Save**. Contact your system administrator for a temporary password if you do not see the Forgot Password?link in the **Log In** window. Log into Sugar with the temporary password and change it.

Managing themes

Themes enabled by the administrator are displayed in the Themes tab of your Edit user page. Follow the steps listed below to change your Sugar theme.

1. Log into Sugar and click your name on the top right corner of any Sugar page.

This displays the Edit User page.

2. Click the Themes tab.

This displays the list of themes enabled by the administrator.

3. Click a theme name to preview it in the right pane.

4. Select the desired theme by clicking on the theme name.

5. Click Save.

Security timeout

For security reasons, the system automatically logs you out if you do not perform any tasks for a specified period of time. This timeout period is determined by two factors:

- The lifetime of the PHP Session Cookie (PHPSESSID). The default lifetime is until the browser is closed.

- The PHP session timeout period. The default value is 1440 seconds (24 minutes).

If you do not perform any tasks for a certain time period, the system logs you out either because the browser session or the PHP session timed out.
Click any button on the page when you are ready to resume working. This automatically directs you to the **Log In** page. You can also close the web browser and navigate to the **Log In** page in a new browser window.

Using Sugar Offline Client

Sugar enables you to work offline if necessary. Your machine is not connected to the server when you are working offline. As a result, the dates on your machine and the server may differ. You will need to periodically synchronize the data on your computer with the data on the server.
The administrator must perform additional one-time tasks to allow users to use Sugar offline and synchronize data.
As an offline user, you can synchronize any changes made by you with changes that other users make. During synchronization, all of your changes are saved to the server, and your local data is updated with changes that other users make. There could be conflicts because two users have changed the same record between synchronization sessions. In such cases, you can choose whether to overwrite the information on the client machine with the information on the server or overwrite information on the server with the information from the client. You can also choose to be prompted whenever there are conflicts so that you can decide which records need to be overwritten.

To synchronize data

1. Launch the Sugar application on your computer if you are not connected to a server that is running Sugar.

2. Click the Sync link at the top of the page, and select Start Sync to synchronize any changes you have made with changes made by other users.

Select only the Clean Sync checkbox to perform the initial synchronization. When you select this option, information from the server is copied to your machine and all local data, including any changes you may have made while disconnected, is overwritten with the server data.
Click Start Sync. This displays the information transfer process in a progress bar.

3. Click the Sync link and select Go Online if you are connected to the server but working in the disconnected mode.

This redirects your browser to the server URL. Close your browser and open a new browser to your local URL to work offline again.
For more information on using the Offline Client, see the Sugar Offline Client Installation Guide.

- Sugar Ultimate 6.3.0 Application Guide

Navigating the User Interface

Overview

The Sugar user interface consists of various modules designed to help you manage customer-related records such as contacts accounts, products, and quotes. Each module, representing a record type, groups the tools and functions needed to perform specific tasks. This enables you to work more efficiently.

Application navigation

You can relate records to one another. For example, a contact can be related to a specific account. When you view a record in Sugar, the system also displays related records. For example, the Detail View of an account displays related contacts in the Contacts sub-panel.

When you log into Sugar, the Home module displays on the page. Tabs for other modules display alongside the Home tab. You can click a tabto open the module to view, create, and manage records.
A drop-down menu is located on the far right of the module bar. You can use this menu to view sets of modules under groups, such as Sales, Marketing, Activities, and so on. This feature is available in all Sugar themes, except the Classic theme.
The Home page displays a list of your activity records such as calls and meetings. It also displays emails, accounts, opportunities, leads, and cases that are assigned to you. For more information, see Home Module.

Common Module options

The following options are available from any page in the Sugar application:

- Shortcut Bar. This static bar, spanning across top of the page, displays the Global Search field and icons for Quick Create forms to create records such as accounts, contacts and opportunities. Quick Create forms enable you to create a record from anywhere in Sugar without navigating to the module associated with the form. Place the cursor on an icon to view the form's name and click the icon to open the form. You can also access this form from the sub-panel of a related record that displays in a record's Detail View. For example, you can create a contact from the Shortcut bar, and also from the Contacts sub-panel of an account's Detail View page. Administrators can add, remove, and move fields to customize the Quick Create forms.
- Global Search field. This field, located in the Shortcut Bar, enables users to enter a letter or a keyword to search all the modules for matching records. For more information, see Global Search.
- System links. System links, located at the top right-hand corner of any Sugar page, are common to all modules. These include your <name>, Logout, Employees, Support, Help, and About. When an administrator logs in, the Admin link is also visible.

Click the left arrow located next to the Logout link to display all the System links.
Click the right arrow next to the About link. The slider bar hides all the System links and displays only your name and the Logout link.

- ¢ Your Name. Click this link, located at the top right of the page, to view your settings. These settings include your profile information, layout options, and so on. For more information, see Editing your User Preferences.
- ¢ Employees. Click this link to view a list of other employees in your organization. This list, maintained by the administrator, displays information such as name, title, phone number, department, and email address. Click a name to view detailed information about the employee. Every user is listed as an employee. However, every employee may not be a Sugar user. For more information, see Employees Module.

- ¢ Admin. This link displays only if you login as the administrator. Click this link to access the Administration Home page to perform administrative tasks. For more information, see Administering Sugar.
- ¢ Support. Click this link to view the Sugar Support page, which provides links to Sugar documentation, Knowledge Base, FAQs, and training courses to guide you through the process of learning the Sugar application.
- ¢ Help. This is a context-aware link to the Application Guide. For example, if you click on the Help link in the **Contacts** module, you will be directed to the **Contacts** section of the Application Guide.
- ¢ About. Click this link to learn more about SugarCRM and view version information. This link also provides credits and source code references.

- Module menu. This menu lists options to perform actions such as creating and viewing records, and the last viewed record(s). Mouse-over a module tab to view the actions you can perform within the module.
- Last Viewed. This list displays records that you last accessed within the module, as well as calls and meetings you recently scheduled. Place the cursor on a module tab to view this list. To access a record again, select the record link.

Sugar Modules

The core Sugar modules are as follows:

- Home. The Home module provides a quick view of your activities and assigned records in the form of Sugar Dashlets. If you access certain records frequently, you can mark them as favorites and add a My Favorite Records Dashlet. For more information on this module, see Home Module. For more information on Dashlets, see Managing Sugar Dashlets.
- **Accounts**. Click this tab to view the Accounts module. Use this module to manage your customers. You can track information about an account, including website, address, number of employees and other data. You can link business subsidiaries to the parent organization to show relationships between accounts. For more information on creating accounts, see Accounts Module.
- **Contacts**. Click this tab to view the Contacts module. Use this module to track people involved in doing business with your organization. You can track contact information such as title, email address, and phone number. Contacts are usually linked to an account. For more information, see Contacts Module.

- **Opportunities**. Click this tab to view the Opportunities module. Use this module to track potential customers. Opportunities help you manage your selling process by tracking attributes such as sales stages, probability of close, deal amount, and other information. For more information, see Opportunities Module.
- **Calendar**. Click this tab to view the Calendar module. Use this module to view scheduled activities (by day, week, month, or year) such as meetings, tasks, and calls. You can also share your calendar with your coworkers to coordinate your daily activities. For more information, see Calendar Module.
- **Calls**.Click this tab to view the Calls module. Use this module to manage outbound and incoming phone calls between you and your customers. For more information, see Calls Module.
- **Meetings**. Click this tab to view the Meetings module. Use this module to manage meetings, including both internal and external invitees, that you schedule or accept. For more information, see Meetings Module.
- **Emails**. Click this tab to view the Emails module. Use this module to send and receive emails. You can also automate email management and create email templates for automated responses and email-based marketing campaigns. For more information, see Emails Module.
- **Tasks**. Click this tab to view the Tasks module. Use this module to manage a list of actions that you need to complete by a specific date. For more information, see Tasks Module.
- **Notes**. Click this tab to view the Notes module. Use this module to manage notes and file attachments. For more information, see Notes Module.
- **Reports**. Click this tab to view the Reports module. Use this module to create custom reports for any module such as Accounts, Opportunities, or Cases. For more information, see Reports Module.
- **Documents**. Click this tab to view the Documents module. Use this module to view a list of documents that you can download. You can also upload your own documents, assign publication and expiration dates, and specify the users who can access them. For more information, see Documents Module.
- **Leads**. Click this tab to view the Leads module. Use this module to track individuals or companies that are potential customers. When you choose fields in the Web to Leads form in Sugar from the fields in the Leads module, Sugar generates the HTML code to display the form and the code to connect entered field values to the fields in the Leads module. For more information, see Leads Module.

- **Targets.** Click this tab to view the **Targets** module. Use this module to track and manage targets. For more information see **Targets Module**.

- **Target Lists.** Click this tab to view the **Target Lists** module. Use this module to create target lists and to track and manage mass marketing campaigns. For more information see **Target Lists Module**.

- **Campaigns**. Click this tab to view the Campaigns module. Use this module to create and manage marketing campaigns. You can implement and track telemarketing, mail, or email-based marketing campaigns. For more information, see Campaigns Module.

- **Quotes**. Click this tab to view the Quotes module. Use this module to quote a price for a specific quantity of a product to a customer. For more information, see Quotes Module.

- **Forecasts**. Click this tab to view the Forecasts module. You can view the committed sales amounts of individual users as well as teams for a specific time period. For more information, see Forecasts Module.

- **Cases**. Click this tab to view the Cases module. Use this module to help Customer Support manage product problems and inquiries by tracking information for each case such as its status and priority, the user assigned, as well as track related open and completed activities. For more information, see Cases Module.

In addition, Sugar provides the following modules, which your administrator can make available to you:

- **Projects**. Click this tab to view the Projects module. Use this module to track and manage tasks for multiple projects. Tasks can be assigned to different users and assigned estimated hours of effort. You can update information as tasks progress or are completed. For more information, see Projects Module.

- **Products**. Click this tab to view the Products module. Use this module to view and manage records that were sold to customers. For more information, see Products Module.

- **Bug Tracker**. Click this tab to view the Bug Tracker module. Use this module to report and track bugs associated with a product. Customer support representatives can manage software-related support problems or inquiries to completion by tracking information for each bug such as its status and priority, resolution, assigned user, release of software involved, type (defect or feature) as well as track related activities. For more information, see Bug Tracker Module.

- **Contracts**. Click this tab to view the Contracts module. Use this module to view, create, and manage contracts and related documents, quotes, contacts etc. For more information, see Contracts Module.

- Knowledge Base. Click this tab to view the Knowledge Base module. Use this module to create, publish, and search for articles within Sugar. For more information, see Knowledge Base Module.

Grouped Modules

Users have the option to view modules as individual module tabs, or as sets of modules belonging to one of the following groups:

- Sales - Home, Accounts, Contacts, Opportunities, Leads, Contracts, Quotes, Products, and Forecasts
- Marketing - Home, Accounts, Contacts, Leads, Campaigns, Targets, and Target Lists
- Support - Home, Accounts, Contacts, Cases, Bug Tracker, and Knowledge Base
- Activities - Home, Calendar, Calls, Meetings, Emails, Tasks, and Notes
- Collaboration - Home, Emails, Documents, Projects, and Knowledge Base
- Reports - Home, Reports, and Forecasts

To view grouped modules

1. Mouse over the All drop-down list located at the far right on the Module navigation bar.
2. Select the group of your choice to view tabs for only those module tabs that belong to the group.

To view all the module tabs, select All from the drop-down list.

Viewing and managing record information

Every module represents a record type such as accounts or opportunities. Sugar provides three types of views for every module: List View, Detail View, and Edit View.
List View: The List View displays links to individual records in a table format. By default, Sugar sorts records in descending order of their creation date. The List View also displays other relevant information such as the name, email address, and phone number for each record. You can change the default view by adding or removing columns depending on the information that you want to view. For more information, see Searching for information in Sugar.
You can mark records that you frequently access as My Favorites from the List View of most modules. You can use the My Favorites search filter to find your favorite records quickly. You can also add a My Favorite Records Dashlet to your Home page to view these records.
You can click a record name to view its details. Alternatively, if you have Edit permissions, you can click the Edit icon located next to the record name to navigate to the Edit View.

The Actions drop-down list, located above the Name column in List View, provides options to perform actions such as Delete, Email, Mass Update, Merge, Add to Target List, and Export one or more records. Sugar paginates long List Views. Click any column name that has a double-arrow icon beside it to sort the list. Click the column name again to reverse the sort order.
Detail View: The Detail View displays available information such as the record name, modified date, and related records. The related records are displayed in the separate sub-panels. For example, a Contact's Detail View displays sub-panels for related Activities, History, Documents, Opportunities, and so on. The Detail View enables you to edit, duplicate, find duplicates, manage subscriptions, and view change log for the record. You can also create, edit, and delete related records in the sub-panels.
Quick Edit Forms: This feature is available in List Views and sub-panels of most modules. It enables you to make quick changes to records without navigating away from the list of records displayed in the List View or sub-panel. This is particularly helpful when you need to make changes to multiple records within sub-panels on the same page or the same List View.
This feature is not available in Classic Theme.
To make quick edits to a record:

1. Go to the List View of a module.
2. Click on the Edit icon located to the left of any record name in the List View.

This displays the Quick Edit form.

3. Update the record and click Save.

Note: If you want to make detailed changes, click View Full Form in the Quick Edit form to go to the Edit page.

Edit View: The Edit View enables you to update existing information and add more details if needed.
To view and edit a record

1. Click a record name in a module's List View, to see its Detail View.
2. Click Edit in the record's Detail View to edit the record.
3. Input the required information and click Save.

Click Cancel to exit the Edit View without saving your changes.
To manage related information in sub-panels
The Detail View of a record displays related information in sub-panels. Each sub-panel consists of rows to list links to records. You can add more records to the list, if necessary This feature enables you to quickly associate multiple records. For example, you can associate more than one contact with an account.

- To minimize a sub-panel, click the arrow located to the left of a sub-panel's name. This hides the sub-panel, but still displays its name and the arrow icon. Click the arrow icon to display the sub-panel.
- To move a sub-panel to a different location on the page, mouse over the sub-panel name, click and drag the panel to the desired location on the page.

- To create a new record, click **Create** below the sub-panel name. This displays the the Quick Create form. Input required information and click Save. Click Full Form to include additional details and click Save.
- To choose a record from an existing list, click Select above the sub-panel.

A list of available records for the sub-panel displays in a separate window.

- To select one or more records from the list, click the box adjacent to the record name and then click Select.
- To delete a related record, click the rem icon located to the extreme right of the record row, and click OK.

Tracking User activity

The Last Viewed list displays recently accessed records, as well as calls and meetings you recently scheduled. You can view this list in the module menu, which displays when you point the cursor at a module's tab. To view a record again, click its link in the Last Viewed list.
You can also create tracker reports to track information such as how many modules were accessed, how many files were modified and so on. For more information, see Viewing and Creating Tracker Reports.

Creating and managing records

You can access a module only if the administrator grants you permission. Your ability to perform actions within a module, such as creating, editing, and deleting records also depend on the access permissions that the administrator grants you.
Sugar displays existing records on a module's Home page. You can see this List View when you select the View option from the module menu.

Assigning records to Users and Teams

When you create a record, by default, you are the user as well as the teamassigned to manage it. You can change the user and teamassignment if required. Assigning a user to the record is optional, assigning a team is a requirement. The assigned user is not required to be a member of the assigned team.
Assigning a record to a team ensures that data is viewed only by users who have the authority to do so. The actions that each team member can perform, such as viewing, editing, and deleting records depends on the permissions that the administrator has granted them.
When a record is assigned to a user, Sugar sends an email notifying the user. You can view the assigned user from the record's Detail View and Edit View.
The following teams are available in Sugar:
Private: All users have their own private team. By default, records that you create are assigned to your private team to allow you to access and manage them.
Global: This is a universal team consisting of all Sugar users. All users can view any record that is assigned to the Global team.
Regular: A regular team may reflect a geographical area, a specific task, or other considerations. When a record is assigned to a regular team, only its members can access it. Two regular location-based teams, East and West, are available out of the box. The administrator creates and manages regular teams.

Team Types

You can assign multiple teams to the record to enable users who are spread across teams to perform record-related tasks. When you assign a record to more than one team, the first team you select is the primary team by default. You can also select a different primary team.
The module’s List View displays the primary team. A Down arrow next to the team name indicates that the record has been assigned to more than one team. Mouse over the arrow to view secondary teams assigned to the record.
You can search for records using team names if the administrator has included Team as one of the search fields.
To assign users and teams to records

1. Select the module in which you want to create a record.

2. Select Create from the Actions liston any page within the module. For example, to create a record in the Accounts module, choose Create Account.

Or
Click the Create icon located on the top right of any page within the module.

3. Enter the record name.

Sugar automatically assigns this record to your private team. A green button indicates the primary team. You are also the assigned user

4. To change the primary team assignment from your default team to a different team, enter the name of the new primary team, or click the Select button to select from the Teams list.

5. To change the assigned user, enter the user’s name, or click the Select button to select it from the Users list; if you do not want to assign a user, click the Clear button to remove the existing user name from the field.

6. To assign more teams to the record, click the Select button to choose new teams from the Teams List, or click the Add button to add additional team fields and then enter the team names in the fields.

7. To change the primary team to a different team, select the radio button to the right of the team that you want to specify as the primary team.

8. To delete a team, click the Trash icon located next to the Select button.

9. Click Save to save the record.

To manage record assignments

1. To edit or delete an assigned team or user, click the record name in the List View.

This displays the Detail View of the record.

2. Click Edit in the Detail View.

This displays the Edit View of the record.

3. To select a secondary team as the primary team, click the button corresponding to the team; to select a team that is not already assigned to the record, enter the name of the team in the primary team field.

4. To assign a new secondary team, click Add and enter the team name in the blank field that displays or the screen. Alternatively, click Select to choose a team from the Team List.

5. To remove a team, click the Trash icon corresponding to the team name.

6. To assign your record to a different user, replace your name with the appropriate user’s name. Alternatively, click Select and choose from the Users List.

7. Click Save.

Tracking and managing record History

The Detail View page of every record displays a History sub-panel that enables you to track record-related activities such as meetings, notes, attachments, and archived emails. Each row in the panel displays icons to edit or remove a record. You can also use this sub-panel to create and record new activities.
To track and manage record history

1. To view the details of a listed note, meeting, attachment, or email, click its title.

2. To sort records in ascending or descending by date, click the Up or Down arrow located next to the Due Date column.

3. To add a note or to attach a file, click Create Note or Attachment. For more information, see Creating Notes and Attachments.

4. To archive an email, click Archive Email, copy the email’s contents into the Email form, and save it.

5. To view a summary of all the listed records, such as subject, status, and date, in a separate window, click **View Summary**.

6. To edit or delete a record, click the appropriate edit or rem icon respectively.

Editing and deleting multiple records

Most of the modules provide a Mass Update sub-panel on their home page that enables you to edit or delete one or more of the listed records simultaneously. This feature is useful to update information shared by several records such as the assigned userand teams. The fields that you can edit vary depending on the module. For example, in the Contacts module you can change the related account.
To edit or delete multiple records

1. To edit information, in the module's List View, select the records that you want to edit.

2. From the Actions drop-down list, select Mass Update to view the Mass Update sub-panel.

3. Make your changes and click **Update**.

You can update team assignments as follows:

- To select a new primary team from the teams you added, click the Primary radio button corresponding to the team name.
- To assign additional teams to the selected records, click Select to select from the Team List, or click Add to create a new team field and enter the team name.
- To replace the current assigned teams for the selected records, click the Replace radio button; to add the teams to the selected records, click the Add radio button.
- To reassign the record to a different user, click Select to choose a new user from the Users list.

Other fields that display in this panel vary depending on the module.

4. Click Update to save your changes.

The selected records are updated.

Integrating data from external sources

You can bring data into Sugar from external applications using Sugar Cloud Connectors.
Typically, you use the import functionality to add a large volume of data from an external system. You can also use Connectors to view and add data to a Sugar record from third party data providers. For example, you can search for additional information about an individual or an organization, and use the data to enhance or replace data in Sugar.
This section discusses the following Connectors: Hoovers, Zoominfo-Person, Zoominfo-Company, Twitter, LinkedIn and InsideView.
For information on Facebook, see My Activity Stream.
For information on Google Docs, see Creating Documents.

Integrating data through a Connector

To integrate data through a Connector
Follow the steps listed below to integrate data through a Connector:

1. Navigate to the record's Detail View.

Point the cursor at the down arrow located next to the account name to view Connectors to LinkedIn and Twitter. Select Twitter to view and respond to Twitter feeds. Select LinkedIn to view connections within a company.
To view data in Hoover's and Zoominfo, click Get Data.
The Data Merge page displays the first step of the merge process on the screen. The Data List displays separate tabs for all the data sources that your administrator has enabled for the module. The list may not display all the available data to view and merge for the selected data source record. Additional data from the data source record may be available in the pop-up view and/or in the Data Merge form.
The table below lists the fields that display in the Data List View, Additional Details Pop-up window, and the Data Merge Form.

Data Source	Data List View Fields	Additional Details Pop-up/Data Merge Form Fields
Hoover's	City, Country, Company ID, Annual Sales, Company Name	Company Name, City, State, Country, Phone Office, Annual Sales, Street Address 1, Street Address 2, Postal Code, Total Employees
Zoominfo-Person	First Name, Last Name, Current Job Company Name, Job Title, College/University	First Name, Last Name, Current Job Company Name, Current Job Start Date, Current Job Industry, Current Job Title, Current Job Street Address, Current Job City Address, Current Job State Address, Current Job Zip Address, Current Job Country Code, Biography, Collection/University, Image URL, Zoominfo Person URL, Email Address, Direct Phone, Fax, Affiliation Job Title, Affiliation Company Name, Affiliation Company Phone, Affiliation Company Website
Zoominfo-Company	Company Name, City, State, Website, Revenue, Employees	Company Name, City, State, Website, Postal Code, Country, Industry, Phone, Website, Description, Company Ticker, Company Profile URL, Annual Revenue, Employees

2. Select the tab of the data source you want to use to find data and enter keywords in one or more search fields.

3. Click Search.

4. The search results display below. All matches are displayed below the data source tabs. If no matches are found in a data source, Sugar displays a message on the data source's tab.

To view the data source record in a pop-up window, including additional data that may not display in the List View, point the cursor on the down arrow next to the Select button.

5. To use another data source, click its tab and enter the keywords in its search fields. The Search fields can be different for each data source.

6. Click a button in the Select column to select a result from the list and click Merge.

You can select one result from each data source to merge data into the Sugar record. The Merge form displays data from all the selected results.
The left-most column displays existing data in the Sugar record. The columns on the right display data from the data sources.

7. To merge data from a data source to a specific field in the Sugar record, click the corresponding left arrow button. To merge data for all the fields, click SmartCopy.

When you have data from two or more data sources, SmartCopy will merge data from the fields in the right-most data source first. The merged data displays in the left column containing the Sugar record fields.

8. Click Save to merge the data into the Sugar record.

Sugar displays the merged data in the record's Edit View.

9. Click Save to save the changes in the record.

Accessing InsideView

You can access InsideView information only for the modules that have been enabled by your administrator. Sugar allows the following modules to be enabled for InsideView access:

- Accounts
- Contacts
- Leads
- Opportunities

To view InsideView information
Follow the steps listed below to view InsideView information related to a record:

1. Go to a module that has been enabled for InsideView access.

2. Select a record from the module's List View page.

This displays the record's Detail View page.

3. Scroll down to the InsideView subpanel in the Detail View page to access InsideView information on the record.

Click the up or down arrows next to the InsideView link to hide or display the InsideView panel within the records in the module.

4. Read the terms of use and privacy policy and select the checkbox if you are accessing InsideView for the first time.

5. Click Get Started.

When you access the Detail View of Accounts, Opportunities, and Leads, InsideView performs a search based on values in the Account Name field and displays the results in the InsideView panel. For the Contacts module, InsideView searches for the Contact name and displays the results in the InsideView panel. You can narrow down search results by adding the Company name in the search field provided in the InsideView panel.

Note: The extent and depth of information that you can access in InsideView depends on your InsideView subscription. For more information, see http://www.insideview.com/cat-produc...ifference.html

Managing Sugar Dashlets

Sugar Dashlets are user-configurable panels that enable you to customize your Home page to view information of your choice. You can edit, add, and delete Sugar Dashlets.
A Sugar Dashlet displays a list of records similar to a module's List View. You can add Sugar Dashlets for modules, charts, websites, and tools such as My Activity Stream and Team Notices. You can filter records based on criteria such as date, status, and subject, and specify the fields you want to view. You can add a Dashlet to your Home page for easy access to records that you have marked as your favorites.
My Activity Stream enables team members to notify each other immediately when one of them creates or modifies a record. User Feed enables users to post their status along with external links, images, and YouTube videos. For more information, see My Activity Stream.
Team Notices display announcements targeted towards the team to which you belong. Only users with administrator privileges can set up these announcements.
Jot Pad enables you to add a text area to your Home page to jot down tasks, personal or business-related, that you need to complete.
You can add multiple Sugar Dashlets of the same kind and configure each one differently. For example, you can add more than one Activity Dashlet. By default, you can add a maximum of ten Sugar Dashlets on your Home page, but the administrator can change this setting. You can also move a Sugar Dashlet to a different location on the page.

Note: Check with your administrator to ensure that the functionality has been enabled if you cannot add or move Sugar Dashlets.

To add Sugar Dashlets

1. Click the Add Sugar Dashlets button on the Home page.

This displays the Add menu in a separate window.

2. To add a module Sugar Dashlet, select the module on the Modules tab.

You can add multiple Sugar Dashlets of the same type and configure each other differently. For example, you can add two Sugar Dashlets for Accounts and display different columns, filters, and so on.
You can add a My Favorite Records Dashlet to display a list of records that you have marked as your favorites across modules.

3. Select a chart from the Charts tab to add a chart Sugar Dashlet.

You can add a chart Dashlet to your Home page or to the Dashboard. The Charts tab displays pre-defined report charts under Basic Charts.Custom report charts are listed under My Saved Reports as well as charts of summation reports. You can add your team report charts as well as Global Team report charts.

4. To add a Team Notice,Jot Pad, or My Activity Stream, select it from the Tools tab.

5. Enter the URL in the appropriate field on the Web tab and click Add to add an external website or a news feed.

This displays the Dashlet on your Home page.
To edit Sugar Dashlets

1. Go to a Dashlet (for example, My Calls) and click the Edit Sugar Dashlet icon on the top right corner of the Dashlet.

This displays the <Dashlet name> : Options pop-up window. You can change the Dashlet’s title, the number of rows that it displays, and the fields that display as columns. You can also filter records that you want to view in the Dashlet, based on the subject, assigned user, due date, and so on. Click Save after you have made the desired changes to the Dashlet settings.

2. To sort a Dashlet by a column such as user name or start date, click the column name on the Home page.

To manage Sugar Dashlets

1. To move a Sugar Dashlet, click anywhere on its title and drag and drop the Dashlet to its new location.

2. To remove a Sugar Dashlet, mouse over the title bar, click the Delete icon and then then click OK in the delete confirmation pop-up box.

3. To manually refresh a Sugar Dashlet, mouse over the title bar, and click the Refresh icon.

4. To modify the auto refresh setting on a Dashlet, select the desired Auto-Refresh interval from the Auto-Refresh drop-down list in the <Dashlet name> : Options pop-up window and click Save.

My Activity Stream

The My Activity Stream Dashlet on your Home page enables team members to notify each other immediately when one of you creates a new contact, lead, opportunity, or case. Team members are also notified when a lead is converted and when a case or opportunity is closed.
My Activity Stream also enables you to post your status along with external links, images, and YouTube videos. Users with Twitter and Facebook accounts can view their feeds within My Activity Stream.

Note:	If you select the Show Full Name option in your User settings, your full name will display in **My Activity Stream** entries.

Users can identify records as My Favorites and run searches based on the My Favorites filter.
To add a My Activity Stream Dashlet

1. Click Add Sugar Dashlets on your Home page.

This displays the Add pop-up window.

2. Select My Activity Stream from the Tools tab in the Add pop-up window.

This displays the My Activity Stream Dashlet on the selected tab of your Home page. You will see your username and a field to enter the status information to post, if User Feed is enabled

3. Click the down-arrow next to your name in the My Activity Stream bar.

4. Enter the team's name in the Visible to Teamfield, or click Select to select it from the Teams list.

5. To post an external link, image, or YouTube video in the My Activity Stream Dashlet, select Link, YouTube, or Image from the drop-down list under your name; enter the URL or path in the field displayed and Click Post.

When you perform an action such as creating a contact or converting a lead, the information automatically displays in the My Activity Stream Dashlet.
To view user pictures within posts
User profile pictures are displayed with user's posts in My Activity Stream. Demo user data has pictures as well. To add a picture to your profile, follow the steps listed below:

1. Click your username on the upper right hand corner of the page to go to your Edit user page.

2. Go to the Picture field in the User Profile tab and navigate to your picture file on your computer.

3. Click Save.

To reply to and delete posts
You can reply to posts that appear in My Activity Stream by clicking the Reply link. You can also delete posts in My Activity Stream by clicking the Delete link.
To filter by Only My Favorites
Follow the steps listed below to identify records as My Favorites :

1. Go to the List View of any module, for example **Opportunities**.

2. Click the grey star icon next to the record name to change its color to yellow. Repeat with other records if required.

Follow the steps listed below to run a search on My Favorites records:

1. Go to the List View of any module, for example **Opportunities**.

2. Mark the checkbox for **My Favorites** and click **Search**.

This displays a list of all the records that had been identified as My Favorites earlier.

Merging duplicate records

You can merge duplicate records into a single record to update your data. You can select which fields you want to merge and when the process completes, the system deletes the duplicate records. This ensures that there is no confusion and that your users are accessing information from only one source. Before the duplicate records are deleted, related information such as activities, history, contacts are moved from the duplicate records to the primary record.
You can merge records in the following modules: Accounts, Contacts, Leads, Opportunities, Cases, and Bugs.
If you already know of the duplicate records that you want to merge, you can do it from the module's List View. If you need to search for duplicates of a record and then merge them, you can do so from the record's Detail View.
To merge duplicate records from the List View

1. Select two or more duplicate records on the module's home page, and click the Merge link from the Actions drop-down list.

The Merge Records page displays fields from the primary record on the left and fields from the duplicate records on the right.

Note: The system treats the first record that you select as the primary record. However, you can change to a different record.

2. Click Set as Primary to specify one of the duplicate records as the primary record.

This moves the record to the left column.

3. Click the << button to replace a field in the primary record with a field from a secondary record.

4. Click Save Merge.

This merges the selected fields, moves all the related information to the primary record, and deletes the duplicate records.
To merge duplicates from the Detail View

1. Click a record in the List View to navigate to its Detail View.

2. Click Find Duplicates.

This displays the Find Search Records to Merge With page.

3. Set filters in the Find Search Records to Merge With page to specify the field that you want to search for. For example, you can search for records that have the same billing address or phone number.

4. Select one or more filters and click Next Step; Click the Trash icon located next to the field name to remove a filter.

This displays the Records Found To Merge With page.

5. Select the records that you want to merge and click Perform Merge.

This displays the Merge Records page.

6. Merge records as described in To merge duplicate records from the List View.

Searching for information in Sugar

You can search for information across Sugar or restrict it to a specific module. Sugar offers the following Search types:

- Global Search
- Basic Search
- Advanced Search

Global Search

You can perform a Global Search on all the modules enabled for Global Search by the system administrator. You can also add or remove modules enabled by the administrator to search on. For more information, see To add or remove modules from Global Search.
Administrators can select the modules that users can search on when using Global Search. This includes both standard and custom modules that have been deployed in Sugar. For more information, see To Enable/Disable modules for Global Search.
Global Search looks for one field at a time. For Contacts, you can enter the first name, last name, or the full name in the Search field. You can also enter a letter to find all records whose names contain that letter. For example, if you enter “a”, Sugar will search for all records that start with the letter “a”.
Global Search may or may not be case-sensitive depending on your database configuration. In general, Global Search on Sugar installations running on the MySQL database is not case-sensitive; Global Search on Sugar installations running on Oracle is case-sensitive, by default.
Enter a letter or a keyword in the Search field and click Enter or Search icon to perform a Global Search. Sugar appends the % wildcard character when searching text fields. For example, searching for “Acme” will match Account names such as Acme Industries or Acme Funds. Searching for “%Acme” will also match account names such as ABC Acme Industries.

The search result lists records for the module from which you perform the search at the top of the list, followed by records from other modules. For example, if you perform a global search from the Opportunities module, matching opportunities are listed first.
Click the Show All link that displays at the bottom of the Search result list to view the full search results from each module in separate panels.
To add or remove modules from Global Search

1. Click the Search button located next to the Global Search field.

This displays a page with the message: There were no results found. Please search again.

2. Click the Advanced link next to the Search button on this page.

3. Drag and drop module names between the Enabled Modules and Disabled Modules columns to add or remove modules from Global Search.

Basic Search

You can perform a basic search based on record name from the Search form in the List View of most modules.

- To perform a basic search, enter the record name, or the first letter of the name in the Search field and click **Search**. When searching for contacts, you can enter the first name, last name, or full name.
- To find only records assigned to you, select My items, and then click Search.
- To find only records that you have marked as your favorites, select My Favorites.
- Click Clear to clear the search filters.

To edit or delete records in the search results, see To edit or delete multiple records.

Advanced Search

Click **Advanced** Search for more filtering options in your search results. The search fields are context-sensitive and will vary depending on the module you are searching.
Text entered in search fields needs to match from the beginning of the value stored in each record, unless the wildcard character is prepended. Only records that match the selected fields are included in the filtered list if text is entered in more than one search field. For example, searching for "fred*" would only match first names like "Fred*erick" or other "Fred" names containing the asterisk (*) character.

Note: Numeric search strings match anywhere in a field. All matching records are displayed in a series of paginated lists.

Advanced Search also provides the option to save search criteria and related search results as Saved Search.

Saving Search Criteria and Layout

Saved Search and Layout option enables you to specify information you want to find and the layout of the search results. You can save the search results in the specified layout for future use. For example, you can view or hide details such as the record name, assigned user, and assigned team in the search results. You can also sort the results in ascending or descending order.
You can save an unlimited number of search results. The Saved Searches drop-down list displays the last saved search at the top of the list.
To save and manage search criteria

1. Enter a name for the search results in the Save this search as field and click **Save**.

This displays the name in the Saved Searches drop-down list.

2. Select a saved search from the Saved Searches drop-down list in the module's home page to view a saved search.
3. Select the saved search from the drop-down list, change the criteria as needed in the fields above, and click Update to modify a saved search.
4. Select a saved search in the Saved Searches drop-down list, click **Delete,** and OK to delete a saved search.
5. Select a cloumn from the Hide Columns list and use the left arrow to move it to the Display Columns list to add a column to the List View.
6. Select a column from the Display Columns list and use the right arrow to move it to the Hide Columns list to remove a column from List View.
7. Use the Mass Update sub-panel to edit or delete multiple records in the search results. For more information, see To edit or delete multiple records.

Home

Overview

When you log into Sugar, you will see your Home page. Tabs for other modules display alongside the Home tab. Other users do not have access to your Home page.
The Home page displays a collection of Sugar Dashlets that display information related to your activities such as meetings and calls. It also displays records assigned to you, such as Accounts, Opportunities, and Cases. Sugar Dashlets are user-configurable panels that you can add, remove, and move as needed. For more information, see Managing Sugar Dashlets.

Home page tabs

The Home module displays the following tabs:

- My Sugar: This tab displays the following list of your customer-related tasks and activities:
  - **My Calls**. Lists phone calls set up by you or includes you, including the subject of the call, the duration, and the start date.
  - **My Meetings**. Lists invitations to meetings set up by you or others including the subject of the call, the duration, and the start date.
  - **My Leads**. Displays a list of leads that you created, including the name, business phone number, and date created.
  - **My Top Open Opportunities**. Lists the top five opportunities sorted by the amount. Opportunities with a status of Closed-Lost or Closed-Won are not included. You can display up to ten opportunities in this Dashlet.
  - **My Accounts**. Displays accounts assigned to you, including the account and phone numbers.

- ¢ **My Open Cases**. Displays a list of customer issues assigned to you for resolution, including the case number, subject, priority, and status.
- ¢ My Activity Stream. Notifies you when otherand team members create a new contact, lead, opportunity, or case. You can also view Twitter and FaceBook feeds of your friends in this Dashlet.
- ¢ My Emails. Lists your unread emails that were imported into Sugar from external email accounts.

- Sales: This tab displays pre-defined sales report charts. For example, My Pipelinedisplays a chart of your sales opportunities based on the cumulative amounts for selected sales stages. This chart, based on a Sugar pre-defined report, displays only when the expected close date is within the specified date range. Click the Edit icon on the Dashlet menu bar to modify the chart title, chart type, sales stage, or time period. The updated information is displayed in the pipeline chart. Click the Refresh icon to refresh the view after an update.
- Marketing: This tab displays pre-defined marketing report charts. For example, Leads by Lead Source displays various sources of your leads to sales prospects, such as cold calls, trade shows, email campaigns, and so on.
- Support. This tab displays pre-defined support-related report charts. For example, Open Cases by Month displays how many new cases have been filed in the current month. Open Cases by User by Status groups cases as new cases, assigned cases, and pending input for each assigned user.
- Tracker: This tab displays pre-defined reports that you can use to track your actions as well as actions of those who report to you. When you select a report from the drop-down list, the report results display below if the relevant data exists in the system. For more information, see **Viewing and Creating Tracker Reports**.

Viewing and managing predefined charts

A chart is a graphical display of a report You can add charts based on custom andpredefined reports on your Home page. When a report is updated, the chart is automatically updated as well.
All charts are displayed as a collection of Sugar Dashlets. You can configure their appearance to suit your requirements. For example, you can change their titles and display or hide columns. You can always revert to the default settings, if needed.
Sugar provides several charts based on predefined reports. You can use these charts to view sales and opportunities for your organization. Each distinctively colored area on a chart is linked to the data set that it represents. You can click any colored area to drill down to the underlying data.
You can edit predefined charts to suit your requirements, but you cannot delete them. Click the Edit icon to modify a chart. Click the Refresh icon to refresh the view after an update. Click the Refresh icon above the chart to recalculate the data source for a specific chart.
The following predefined charts are displayed on your Home page:

- **All Opportunities by Lead Source by Outcome**. This is a horizontal stacked bar chart that displays total opportunities for each lead source. Each bar is made up of multi-colored segments that represent the outcome proportions for that lead source.

- **All Opportunities by Lead Source**. This is a pie chart that groups total sales opportunities by each lead source.

- Campaign ROI. This is a bar chart that displays the return on investment (ROI) for a campaign.

- Modules used by Team Members (Last 30 Days). This is a bar chart that displays modules used most by members of your team in the last 30 days.

- My Closed Won Opportunities. This is a gauge chart that displays your closed won opportunities. The gauge size matches the total number of opportunities assigned to you. The position of the line on the gauge and the number displayed inside the gauge matches the total number of opportunities assigned to you with the Sales Stage set to Closed Won. The gauge is divided into four ranges that are automatically calculated to be about equal size.

- My Forecasting. This is a bar chart that compares your quarterly quota with your committed forecast and your closed won opportunities.

- My Modules Used (Last 30 Days). This is a bar chart that displays the modules you used the most in the past 30 days.

- My Pipeline By Sales Stage. This is a funnel chart that displays the total dollar amounts for all your opportunities grouped by sales stage.This chart displays only when the expected close date is within the specified date range.

- **Pipeline By Sales Stage**. This is a funnel chart that displays the total dollar amounts for all your opportunities grouped by sales stage.

- **Outcome by Month**. This is a vertical stacked bar chart in which each bar displays the total sales pipeline for each month. Each bar is made up of multi-colored segments that represent the outcome proportions for the pipeline in that month.

The Sales page also displays the following charts:

- **Leads By Lead Source**. This is a horizontal stacked bar chart where each bar shows the value of potential sales at each stage of the sales pipeline.

- **Opportunities by Lead Source**. This is a horizontal chart of that displays the proportion of total sales opportunities for each lead source.

- Add Page. The Add Page option allows you to add additional tabs to your Home page. Each tab is a new page that you can add to reorganize your Home page and display some Sugar Dashlets on separate pages.

Modifying the Home module

You can edit the Home page to rename page tabs, change the Home page layout, and add new Sugar Dashlets. For more information on adding Sugar Dashlets, see Managing Sugar Dashlets.
You can add new pages to the Home page if you need space to accommodate more Sugar Dashlets. These pages display as additional tabs next to the My Sugar tab.
Note the following restrictions when adding new pages:

- Maximum of ten pages are allowed on the Home module
- Maximun of three columns on a page are allowed
- Page names cannot be duplicated
- Page names cannot be more than 25 characters long

You can revert to the default Home module setup at any time by clicking **Reset Homepage** in your **User Settings**

To customize the Home module

1. Click the title bar of a Dashlet, and drag and drop it in a different location on the Home page to rearrange the Dashlet location on your Home page.
2. Follow the steps listed below to rename the My Sugar tab:
   a. Double-click the tab name.

The tab label changes to a text field.

   b. Enter a new name in the text field and click outside the field to display it.

3. Click the Add Sugar Dashlets linkto add a Sugar Dashlet. For more information, see Managing Sugar Dashlets.
4. Follow the steps listed below to change the number of columns in the page layout:
   a. Click the Change Layout link on your Home page.

This displays the Change Layout pop-up box.

b. Select the number of columns you want displayed on the page.

This reformats your Home page layout and displays existing information within the number of specified columns.

To add and manage new pages

1. Click the Add Page link indicated by a plus sign (+) located to the right of the Home page tabs.

This displays the Add Page pop-up box.

2. Enter a name for the page, select the number of columns you want on the page, and click Submit.

The new page tab is added to the Home page and the new page displays on the screen.

To revert to default Home page settings

1. Click your name located at the top right-hand corner of the page.

This displays your Edit user page.

2. Click Reset Homepage, and OK in your Edit user page.

Leads

Overview

Leads are early contacts in the sales process. Use the Leads module to create, manage, and track sales leads or unqualified opportunities along with related activities, sales campaigns, and history.

You can associate a lead with any type of campaign to track the effectiveness of the campaign in generating opportunities for your organization.

Creating Leads

You can create Leads in Sugar and you can also import them into Sugar using a comma-delimited, tab-delimited, or custom delimited file. When you import Leads, you can select the default value for the Lead Source, such as Direct Mail, Trade Show, and so on from the drop-down list in the Default Value column. Select Import from the Leads tab to import Leads. For more information on importing data, see Importing Data.
To create a lead

1. Select **Create Leads** from the Actions drop-down list on the Leads tab.

Or, click the Create link in the far right corner of the List View or Detail View of any Leads page.

2. Enter the following information in the Leads Overview section:

First Name. Enter the lead’s first name.
Last Name. Enter the lead’s last name.
Title. Enter the business title of the lead.
Department. Enter the department to which the lead belongs.
Account Name. Enter the name of the company related to the lead. When you convert the lead, you have the option to create the account as a related record.
Office Phone. Enter the lead’s office phone number.
Mobile. Enter the lead’s mobile phone number.
Fax. Enter the lead’s fax number.
Website. Enter the website of the individual’s organization.
Primary and Other Address: Enter the primary address and Other Addressinformation. To copy the other address from the primary address, select the Copy address from left checkbox.
If you select a lead from the Lead list, the system automatically enters the address. You can edit this information if needed.

Email Address: Enter the email address for the organization and your contacts and campaign targets within the organization. Select Invalid to indicate an incorrect email address. If you sent out campaign emails this contact and the individual chose to opt-out of receiving them, select Opted Out.
To add an additional email address, click the Add icon. You can add multiple email addresses.
Description: Enter a brief description for the lead.
Enter the following details in the More Information section:
Status. Select the status of the lead from the drop-down list. Standard status options are listed below. The administrator can change these to suit your organization's requirements:

- New: Unassigned, new lead.
- Assigned: Newly assigned to user.
- In Process: Currently active.
- Converted: The status appears as converted after the Convert Lead link has been selected. The system automatically changes the status in this field.

Note: Do not delete the Converted status from the drop-down list.

- Recycled: No opportunity at this time, lead should recycle to marketing for future follow-up.
- Dead: No opportunity and/or bad data.

Status Description. Enter a brief description for the lead status.
Opportunity Amount. Estimated amount of the sale.
Campaign. Enter the campaign name or click Select to select it from the Campaigns list to associate the lead with a campaign.
Lead Source. Select the origins of the lead such as Trade Show or Direct Mail from the drop-down list.
Lead Source Description. Enter a brief description of the lead source.
Referred by. Enter relevant information in this field if someone referred the lead to you.
Do Not Call. Check this box to add the lead's name to the Do Not Call list. This is to ensure that the lead is not contacted through the phone during campaigns.
Specify the following information in the Other section:
Teams. Enter the name of the new primary team to change the primary team assignment.
Click Select (arrow pointing diagonally to the left icon), and choose the team from the Team List, or click Add to add team fields and enter the team names to assign additional teams to the record. For more information on teams, see Assigning Records to Users and Teams.
Assigned to. Enter the name of the individual who is assigned to the record, or click Select to choose from the User List. By default, this is assigned to you.

3. Click Save.

This displays the lead's Detail View. You can create activities, attach notes, and view past marketing activities, including a list of campaigns, if any, that were sent out to the lead in the Lead's Detail View.

Managing Lead information

Managing leads includes tasks such as importing and exporting leads, and tracking them through their lifecycle.
To manage leads

- Use the Search sub-panel on the Leads Home page to search for a lead. For more information, see Searching for Information in Sugar.
- Follow the steps listed below to add one or more leads to a campaign Target List:

  a. Select one or more leads in the Leads List View.

  b. Click Add To Target List from the Actions drop-down list.

This opens the Target Lists Search page.

  c. Select the Target List from the Target Lists Search page.

- For information on how to import and export leads through vCards, see Using vCards to Import and Export Contacts.
- Select the data source from the lead's Detail View to pull in data from external data sources such as LinkedIn. For more information on data sources, see Integrating data from external sources.
- Select Import from the Actions drop-down liston the Leads List View page to import records. For more information on importing data, see Importing Data. For information on how to import Leads from vCards, see Using vCards to Import and Export Contacts.
- Select records from the List View, click the Export link from the Actions drop-down list to to export records. For more information, see Exporting Data.
- Select duplicate records from the List View, click the Merge Duplicates link to merge duplicate records. For more information see To merge duplicate records from the List View.
- Click the **View Change Log** link in the Detail View of a Lead record to track changes in the lead information over time.
- Select multiple records in the Leads List View, click the Mass Update link in the Actions drop-down list to edit or delete information related to multiple leads. For more information, see To edit or delete multiple records.

- Click on the lead name in the List View to display the Detail View of that lead record. The follow tasks can be performed from the Detail View page:

  ¢ Click **Edit** to modify the record.

  ¢ Click Manage Subscriptions to manage newsletter subscriptions.

Select the newsletter from the Available NewsLetters list and drag it to the NewsLetters Subscribed To list to add the lead to a newsletter subscription mailing list.
Drag the newsletter from the Newsletters Subscribed to list to the Available Newsletters list to add the individual to a newsletter subscription mailing list, Click Save to update the information.

  ¢ Click **Duplicate** to duplicate a lead, on the detail page. This is a convenient way of creating a similar lead. You can change the information in the duplicate record to create the new lead.

  ¢ Cick **Delete** to delete a lead.

  ¢ For more information on how to view and edit related information in a sub-panel, see To manage related information in sub-panels.

- Follow the steps listed below to archive a related email:

  a. Scroll down to the History sub-panel where related emails are listed in the Detail View.

  b. Click Archive Email.

This displays the Create Archived Emails form.

  c. Copy-paste information related to the email into the fields in the Create Archived Emails form and click Save.

Note: You can create Web-to-Lead forms for use in your web-based campaigns and other sources such as your website. This Lead information is saved in the Sugar database and can be used to generate opportunities for your organization. For more information, see Creating Web-to-Lead Forms.

Converting Leads

Sugar enables you to convert leads into Contacts, Opportunities, and Accounts after you have evaluated and qualified them. Based on your lead-conversion options, set by your Sugar administrator, you can do any one of the following with lead-related activities (Tasks, Calls, Meetings, Notes, and Emails) during conversion:

- Create and relate copies of all of the Lead's activities to new records that you have selected. Copies are created for each of the selected records.
- Move all of the Lead's activities to a new record that you have selected.
- Do nothing - The activities remain related to the converted Lead.

To convert a lead

1. Click Convert Lead on the Lead’s Detail View page.

This displays the Convert Lead page.
The Create Account checkbox is pre-selected by the system to create a new account for the lead. You can also create other related records such as a note, task, and opportunity if the administrator has enabled you to do so.

2. Click the select arrow next to the Select Account fields to choose an account from the Accounts list and associate the lead with an existing account.
3. Select the appropriate checkbox to create a note, appointment, or opportunity.

This displays fields to enter the information. For example, if you select the Create Opportunity checkbox, fields such as Opportunity Name, Opportunity Amount, and Expected Close Date display below.

4. Select a module from the **Move Activities to** or **Copy Activities To** drop-down list.

Note that the drop-down list changes based on your selections on the Convert Lead page. For example, if you have selected Create Opportunity, values displayed in the **Move Activities to** or **Copy Activities To** drop-down list are: Contact, Account, Opportunity.
The **Move Activities to** or **Copy Activities To** field is missing if your Sugar administrator has selected Do Nothing for Lead-related activities.

5. Populate the mandatory and other fields and click Save.

This creates a new contact, associates it with the related records and displays links to the new records. You can also view these records from the contact’s Detail View page.

Contacts

Overview

Use the Contacts module to create and manage contacts for your organization.
A contact is any individual who is a valid sales lead; a lead that has been evaluated and assessed for a possible sales opportunity. You can associate a contact with any record such as an Account, Opportunity, or Campaign. Associating a contact with a campaign enables you to track the effectiveness of the campaign in generating opportunities for your organization.

Contact actions

The Actions drop-down list on the Contacts tab displays the following options:
Create Contact. Click this option to create a record for a new contact.
Create Contact From vCard. Click this option to import a vCard file from your local system.
View Contacts. Click this option to view a list of your existing contacts.
Contact Reports. Click this option to view an existing report on your contacts, or to create a new report.
Import Contacts. Click this option to import contact information from an external application or file. For more information, see Importing Data.

Creating Contacts

You can create contacts in Sugar and you can also import them into Sugar using a comma-delimited, tab-delimited, or custom delimited file.
To create a contact

1. Select **Create Contact** from the Actions drop-down list on the Contacts tab.

Or, click the Create Contact icon in the Shortcuts Bar, and add additional information after you save the form.
Or, click the Create icon on any page within the Contacts module.

2. Enter the following information in the Contacts Overview section:

First Name. Enter the contact’s first name.
Last Name. Enter the contact’s last name.
Title. Enter the contact’s business title.
Picture. Click Browse to navigate to the image file location on your machine to upload the picture. Only image files with .jpg, .png, and .bmp extensions are accepted.

Office Phone. Enter the contact's office phone number.
Mobile. Enter the contact's mobile phone number.
Fax. Enter the contact's fax number.
Account Name. Enter the account name associated with the contact; or click Select to choose from the list of existing accounts.
Address: Enter the Primary Address and Other Address information. Select Copy address from left box to copy the Primary Address into the Other Address section.
If you select a contact from the Contact's list, the system automatically enters the address. You can edit this information if required. Similarly, if the contact is related to an account, Sugar automatically auto-fills this field with the account's primary address.
Email Address: Enter the email address for the organization and your contacts and campaign targets within the organization. Select **Invalid** to indicate an incorrect email address. If you sent out campaign emails this contact and the individual chose to opt-out of receiving them, select **Opted Out**.
To add an additional email address, click the Add icon. You can add multiple email addresses.
Description: Enter a brief description for the contact.
Enter the following details in the **More Information** section:
Reports To. Click Select and select the contact's supervisor from the Contacts list.
Lead Source. Select the source that generated the lead, such as direct mail or trade show from this drop-down list.
Campaign. Enter the campaign name or click **Select** to select it from the Campaigns list to associate the contact with a campaign.
Sync to Outlook. Select this box to synchronize this contact information with Outlook if you have installed the Sugar Plug-in for Microsoft Outlook.
Do Not Call. Select this box to add the contact to the Do Not Call list. This is to ensure that the contact is not targeted during campaigns.
Specify the following information in the Other section:
Teams. Enter the name of the new primary team to change the primary team assignment. Click Select to choose new teams from the Teams List, or click Add to add additional team fields and enter the team names. For more information on assigning teams, see Assigning Records to Users and Teams.
Assigned to. Select the individual who is responsible for communicating with this contact. You are assigned to the contact by default.
Portal Information: These fields display on this page only if the administrator has enabled the Customer Self-Service Portal option.
Portal Name. Assign a user name to allow the contact to access your Case portal.
Portal Password. Enter a user password for the contact to access the portal.
Confirm Portal Password. Enter the password again to confirm it.
Portal Active. Select this box to specify that the portal is in use.

3. Click **Save** to save the record and view its detail page.

Click **Cancel** to return to the Contact's home page without creating the new contact.

Managing Contacts

Managing contacts includes tasks such as editing, importing and exporting contact records.
To manage contacts

- To edit or delete information related to multiple contacts, select multiple records in the Contacts List View and click the Mass Update link in the Actions drop-down list. For more information, see Editing and Deleting Multiple Records.

- To add one or more contacts to a campaign target list, select them in the Contacts List View and click Add to Target List to select the list from the Target Lists pop-up window.
- To display the Detail View for a contact, click on the contact name in the List View.
- To edit contact information, click **Edit** in the Contact's Detail View.
- To archive a related email, scroll down to the History sub-panel in the Detail View where related emails are listed and click Archive Email. This displaysthe Create Archived Email form. Copy-paste information related to the email into this form to save it for your records.
- To pull in account data from data sources such as LinkedIn, select the data source from the contact's Detail View. For more information on data sources, see Integrating data from external sources.
- To import records, select Import from the Actions drop-down listof the Contacts tab. For more information on importing data, see Importing Data.
- To export records, select the records from the Contacts List View, click Export from the Actions drop-down listand follow the process described in Exporting Data.
- To merge duplicates, select the records from the Contacts List View, click Merge from the Actions drop-downlist, and follow the process described in Merging Duplicate Records.
- To manage newsletter subscriptions, click Manage Subscriptions on the Contact Detail View. To add the individual 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. To remove the individual from the mailing list of a newsletter, drag the newsletter from the Newsletters Subscribed to list to the Available/NewsLetters Unsubscribed to list. Click Save to update the information.
- To duplicate contact information, click **Duplicate** in the Contact Detail View.

Duplication is a convenient way of creating a similar contact. You can change the information in the duplicate record to create a new contact.

- To track changes made to contact information over time, click the **View Change Log** link located in the Detail View.
- To manage records in a sub-panel, see To manage related information in sub-panels.

Using vCards to Import and Export Contacts

vCards are electronic business cards that are exchanged through applications such as email and web browsers. You can view and create a vCard file from the record’s Detail View. You can save it to your local machine to import it to other applications.
When you create contacts in Sugar, or import them from another application, the system automatically creates a vCard for it. You can also create a vCard file from the record’s Detail View and save it in Outlook, or on your local machine.
To import a vCard

1. Select **Create from vCard** from the Actions drop-down listof the Contacts module tab.

This displays the Import vCard page.

2. Click **Browse** to navigate to the vCard location on the local file system.

3. Select the file from your local machine and click **Import vCard**.

This displays the Detail View page of the created contact.

4. Click the **vCard** icon located to the right of the contact Name in the contact’s Detail View to open the vCard and edit the information.

To edit or to save a vCard to a different location

1. Click the vCard icon located next to the contact’s name in the contact’s Detail View.

This displays a dialog box prompting you to open or save the file.

2. To edit the vCard and save it in your Contacts folder in Outlook, open the file, make the necessary changes and click Save; to save the vCard on your local machine, select Save As.

Accounts

Overview

Use the Accounts module to create and manage customer accounts for your organization.

An Account contains your customer information such as name and address. Each account can be associated with other records such as Opportunities and Contacts.

Account actions

The Actions drop-down list on the Accounts tab displays the following options:
Create Account. Click this option to create a new account.
Accounts. Click this option to view a list of existing accounts.
Account Reports. Click this option to view or create reports on existing accounts.
Import. Click this option to import account information from external systems and data sources. For more information, see Importing Data.

Creating Accounts

You can create Accounts in Sugar, or you can import them into Sugar using a comma-delimited, tab-delimited, or custom delimited file.
To create an account

1. Select Create Account from the Actions drop-down list on the Accounts tab.

Or, click the Create Account icon in the Shortcuts Bar, and add additional information after you save the form.
Or, click the Create icon on any page within the Accounts module.

2. Enter the following information in the Account Overview section:

Account Name. Enter a name for the account.
Website. Enter the URL for the organization's website.
Office Phone. Enter the office phone number.
Fax. Enter the fax number for the organization.
Address. Enter the billing and shipping addresses. To copy the Billing Address to the Shipping Address section, select the Copy address from left checkbox.

Email Address: Enter the primary email address for the account. To add additional email addresses for your contacts and campaign targets within the organization, click the Add icon. To indicate the primary email address, select Primary. If you sent campaign emails to this contact and the individual chose to opt-out of receiving them, select Opted Out. If the email is incorrect, select Invalid.
Description: Enter a brief description for the lead.
Enter the following information in the More Information section:
Type. Enter the account category such as Customer or Partner.
Annual Revenue. Enter the annual revenue for the organization.
SIC Code. Enter the Standard Industrial Classification code that indicates your organization's type of business.
Member of. Enter the names of organizations associated with the account.
Campaign. To target the account for a marketing campaign, click Select and choose an existing campaign.
Industry. From this drop-down list, select the industrial sector to which the account belongs.
Employees. Enter the number of employees in the organization.
Ticker Symbol. Enter the stock ticker symbol for the organization.
Ownership. Specify the owner information.
Rating. Enter the organization's rating in the industry.
Specify the following information in the Other section:
Teams. Assign one or more teams to manage the record. By default, your private team is assigned as the primary team. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click Select and choose new teams from the Teams List, or click Add to add additional team fields and enter the team names. For more information on assigning teams, see Assigning Records to Users and Teams.
Assigned to. Enter the name of the individual you want to assign to the account or click Select to choose from the User List. By default, this record is assigned to you.

3. Click Save to save the new account information; click Cancel to exit the page without saving the information.

Managing Accounts

Managing Accounts includes tasks such as adding, editing, and deleting accounts.
To view and manage accounts

- To sort the Accounts List View, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple accounts, select multiple records in the Accounts List View and click the Mass Update link in the Actions drop-down list. For more information, see To edit or delete multiple records.
- To import records, select Import Accounts from the Actions drop-down list on the Accounts tab. For more information on importing data, see Importing Data.
- To export records, select the records from the Accounts List View, click the Export link in the Actions drop-down list and follow the process described in Exporting Data.

- To add one or more accounts to a campaign target list, select them in the List View, click Add to Target List in the Actions drop-down list, and select the list from the Target Listspop-up box.
- To view account information, click the record’s name in the List View. This displays sub-panels for related records such as Activities, History, Contacts, Opportunities, and Leads on the Detail View. You can create new records or edit existing ones.
- To edit an account, click **Edit** on the Detail View page, make the necessary changes, and click **Save**.
- To pull in data from data sources such as LinkedIn, select the data source from the account’s Detail View. For more information on data services, see Integrating data from external sources.
- To merge duplicates, select the records from the Accounts List View, click the Merge link in the Actions drop-down list, and follow the process described in Merging Duplicate Records.
- To archive a related email, scroll down to the History sub-panel in the Detail View where related emails are listed and click Archive Email. This displays the Create Archived Email form. Copy-paste information related to the email into this form to save it for your records.
- To copy the account’s billing or shipping address to the associated contact records, in the Edit View, click the Copy button, select one or more contacts and click Copy Address to Checked Contacts.
- To duplicate an account, click **Duplicate** on the Detail View page and click **Save**.

This duplicates the account and displays its Detail View page. Duplication is a convenient way of creating a similar account. You can change the information in the duplicate record to create a new account.

- To delete the account, click **Delete** on the Detail View page.
- To track changes in the account record, click **View Change Log** on the account’s Detail View page.
- To view or manage related records in a sub-panel, see To manage related information in sub-panels.

Opportunities

Overview

Use the Opportunities module to create and manage sales opportunities, qualified leads, and view related records.
An opportunity specifies the estimated amount of a sales deal and is tied to a sales stage. A sales stage, such as Qualification, Closed Won, or Closed Lost identifies how close you are to making the sale. The administrator defines and sets the sales stage depending upon the requirements in your organization. The estimated amount can vary depending on the sales stage.

Sales stages

Based on the sales stage, the system calculates the probability of a sale. For example, at the Proposal sales stage, the system calculates the probability as 65%, and at the Negotiation sales stage, probability increases to 80%. These numbers are used to forecast sales for a specified time period. For more information, see Forecasts Module.
The following are the default sales stages in Sugar:
Prospecting. This is the first stage in the sales process and indicates that the opportunity with this prospect is new and needs to be qualified by a sales representative.
Qualification. The sales representative is currently interacting with the prospect to determine if a sales opportunity exists.
Needs Analysis. The sales representative uncovers the prospect's business problems (having determined that the prospect is interested in the products or services).
Value Proposition. The sales representative maps the company's products and/or services to the prospect's business problems and describes the value of the solution (having uncovered the prospect's business problems).
Id. Decision Makers. The sales representative identifies the decision makers necessary to close this opportunity (having determined that there is a match between the prospect's business problems and the company's products and/or services).
Perception Analysis. The sales representative analyzes the prospect's perceived value of the company's solution to prepare the appropriate combination of products and services for a sales quote.
Proposal/Price Quote. The sales representative delivers the proposal or price quote to the prospect.
Negotiation/Review. The sales representative reviews and negotiates the proposal with the prospect.
Closed Won. The sales representative has won this opportunity and the company can now bill the customer.
Closed Lost. The sales representative has lost this opportunity.
Every opportunity must be associated with an account. You can associate an opportunity with only one account but you can associate it with multiple leads and contacts.
You can associate an opportunity with a campaign to track the campaign’s effectiveness in generating opportunities for your organization. Any campaign-related opportunity that generates revenue is

reflected in the campaign's ROI (Return on Investment) chart. For more information, see Viewing a Campaign's Return on Investment.

Note: You can associate an opportunity with only one campaign.

Creating Opportunities

You can create opportunities in Sugar, or you can import them into Sugar using a comma-delimited, tab-delimited, or custom delimited file. You can create an opportunity not only from the Opportunities module, but also from the Convert Lead page, and from the Detail View of Accounts, Contacts, or Quotes.
To create an opportunity

1. Click **Create Opportunity** from the Actions drop-down list on the Opportunities tab.

Or, click the Create **Opportunity** icon in the Shortcuts Bar, and add additional information after you save the form.
Or, click the Create icon on any page within the **Opportunity** module.

2. Enter the following information in the Create(Opportunity) page:

Opportunity Name. Enter a name for the opportunity.
Account Name. Enter the name of the account related to the opportunity. To choose from the list of existing accounts, click **Select**.
Currency. Select the currency used from the drop-down list.
Expected Close Date. The expected or estimated close date for this particular opportunity.
Opportunity Amount. Enter the estimated amount of the sale.
Type. Use this drop-down list to specify whether the opportunity is from an existing customer or a potential customer.
Sales Stage. Specify the current status of this opportunity from the drop-down list. The value specified for the Sales Stage determines the default value displayed in the Probability field on the Opportunity page.
Lead Source. Use this drop-down list to specify the lead source such as Trade Show or Cold Call.
Probability (%). Sugar determines the values for this field based on the selected Sales Stage value. For example, if the Sales Stage value is Closed/Won, then the probability changes to 100%. You can manually change the Probability% value.
Campaign. To associate an opportunity with a campaign, enter the campaign name or click Select to select it from the Campaigns list.
Next Step. Enter the next step in closing a sale.
Description. Enter a brief description of the opportunity.
Specify the following information in the Other section:
Team. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.
Assigned to. Enter the name of the individual you want to assign to the record or click Select to choose from the User List. By default, this record is assigned to you.

3. Click Save to create the new opportunity; click Cancel to return to the Opportunity home page without saving the information.

The opportunity is now listed not only on the Opportunities home page but is also listed in the Forecasts worksheet under the appropriate time period. For more information on forecasts, see Forecasts Module.

Managing Opportunities

Managing opportunities includes tasks such as editing, deleting, importing, and exporting records.
To manage opportunities

- To sort a list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple opportunities, select multiple records in the Opportunities List View and click the Mass Update link in the Actions drop-down list. For more information, see To edit or delete multiple records.
- To import records, select Import Opportunities from the Actions drop-down list on the Opportunities tab. For more information on importing data, see Importing Data.
- To export records, select the records from the Opportunities List View, click Export in the Actions drop-down list and follow the process described in Exporting Data.
- To merge duplicates, select the records from the Opportunities List View, click Merge in the Actions drop-down list and following the process described in To merge duplicate records from the List View.
- To view the details of an opportunity, click the opportunity name in the List View.
- To edit the details, on the detail page, click **Edit**.
- To duplicate an opportunity, click **Duplicate** on the Detail View page. Duplication is a convenient way of creating a similar opportunity. You can change the information in the duplicate record to create a new opportunity.
- To delete an opportunity, click **Delete** on the Detail View page.
- To track changes to an opportunity over time, click the **View Change Log** tab on the Detail View of the page.
- To view and manage related records in a sub-panel, see To manage related information in sub-panels.
- To archive a related email, scroll down to the History sub-panel in the Detail View and click Archive Email. This displays theCreate Archived Emails page. Copy-paste information related to the email into the Create Archived Emails page and save it for your records.

- To view or create an opportunity report, click **Opportunities Report**. For information on viewing and creating reports, see Reports Module.

Forecasts

Overview

Use the Forecasts module to view quotas and committed sales amounts based on sales opportunities for customer accounts. Only users who are assigned opportunities and their managers can view forecast information in Sugar.

Note: By default, this module is hidden. The administrator must display it for your use.

A forecast is an estimate of the revenue you can generate in a quarter and is comprised of the following:

- Time periods
- Forecast schedules
- Forecast worksheet
- Sales quotas

Time periods

Typically, forecasts are based on month, quarter, or year. Organizations can define any time period depending on how they want to measure sales forecasts; for example, weekly or daily forecasts. Based on this decision, administrators define the sales forecast time periods in Sugar. Administrators can also define the fiscal year for your organization and associate it with the forecast time periods. The Forecasts module displays time periods after the administrator has defined them.

Forecast schedules

Based on the defined forecast periods, the administrator can create different forecast schedules for each team. For example, one team's forecast schedule can be based on monthly time periods and another team's on quarterly time periods.

Forecast worksheets

A Forecast worksheet reflects what sales people and their managers estimate they can generate in sales. Displayed information in Forecasts Worksheet depend on your role in the Sales organization.
Regardless of what is entered in the worksheet, the performance of sales representatives is, typically, measured against their sales quotas. The worksheet enables Sales Managers to make more accurate sales predications for a specific time period because it displays a tree view of the reporting hierarchy of the sales organization. Managers can drill down to the opportunities they want to view or edit. They can also view the best case, likely case, and worst case sales estimates, view the committed amounts, and change these amounts.
You can add the My Forecasts Sugar Dashlet on your home page for easy access to your worksheet. For more information on adding Sugar Dashlets, see Managing Sugar Dashlets.
Teams are based on the reporting hierarchy in the Forecasts module. You can be one of the following roles:

- Sales representatives who are only responsible for managing their own opportunities
- Team leads or lower level managers who are responsible for managing their own opportunities as well as their direct reports
- Sales managers who manage their direct reports but are not responsible for managing any opportunities

Sales representatives

When you log into Sugar as a Sales Representative, the Forecast worksheet displays a list of your opportunities along with the estimated sales amount, probability of a sale, and the weighted amount. Closed Opportunities within the specified time period are displayed.
Sugar automatically extracts details from the opportunities to calculate the Amount, Probability, and Weighted Amount. Any change that you make to an opportunity is immediately reflected in the worksheet.
The amount displayed in the worksheet is the opportunity's estimated sales amount.
The probability percentage displayed in the worksheet is of the opportunity's sales stage.
The weighted amount is the amount that may be realized from the sale. Sugar calculates the weighted amount as the Opportunity Amount divided by the Probability Amount. For example, an opportunity worth $10,000 with a 10% probability will have a weighted amount of $1,000.00.
You can commit the totals of the above amounts as the numbers that you will generate in sales. Sugar enables you to use the worksheet to commit different values for your best case, likely case, and worst case forecasts. Your manager can override your input and enter a new committed amount on their worksheet. This will not impact the amounts entered on your worksheet.
You can view your quota for the selected time period at the top of the Forecasts worksheet.

Team Leads

Team leads can view the estimated best case, likely case, and worst case forecasts for each of their direct reports as well as for themselves. As a team lead, you can view the opportunities of your direct reports. You can also override the committed amount that your direct reports enter on the worksheet. Your worksheet has two levels of committed values, one when you make changes for yourself (Direct) and another when you make changes for your team (Rollup). Commit at the Rollup level to notify your manager about your changes and modifications.

Sales Managers

Sales managers can view the quotas, estimated best case, likely case and worst case forecasts for each of the team leads and their direct reports. This enables them to make more accurate forecasts. As a Sales Manager, you can drill down to the opportunities of any sale representative. You can also override the committed amount for any member of your sales team.

Note:	Any changes that a Team Lead or a Sales Manager makes to a sales team member's estimate is independent of that member's estimate on their worksheet. The team member's worksheet does not display changes made by the Team Lead or Sales Manager on the same.

The forecast worksheet also displays a Create Opportunity quick form to create a new opportunity. Any new opportunity that you create displays in the Forecast Opportunities sub-panel. For more information on the Opportunities module, see Opportunities Module.

Worksheet charts

The worksheet enables you to monitor sales forecasts closely. The worksheet chart enables you to view the general sales forecasting trend. The chart displays a 3-point comparison between the actual sales amount, the committed amount, and quotas. View your final committed amount as a stacked group-by chart on the View Chart tab to gauge your performance during the past few quarters.

To edit the Forecasts Worksheet

Follow the steps listed below to edit the Forecasts Worksheet:

1. Select the time period from the Time Periods drop-down list on the (Forecasts) Worksheet page.

If you log in as a Sales Representative, the worksheet displays your quota at the top of the page. It also lists the amount, probability, and weighted amount for each of your closed opportunities for the time period.

a. To view or edit the details of an opportunity, point the cursor at the down arrow next to the opportunity name.

The Additional Details pop-up displays the account name, probability percentage, and type. Click the Edit icon in the pop-up box to edit the opportunity.

b. To enter an estimate for best case, likely case, and worst case forecasts, enter the amounts in the respective fields.

Sugar updates the Totals row with the specified amounts.

c. To commit the amounts, click Copy Values and select Total Estimated Amounts.

The estimated amount is now reflected in the Enter amounts that you would like commit fields.

d. Click Commit and then click OK when the system displays a message asking you to confirm the action.

Note that any changes to make to the estimated amount for a direct report or a sales representative does not change their committed values that display on your worksheet. Hence, the totals of the estimated amounts that you commit differs from their committed values.

e. To revert to the committed values, click Copy Values, and select Sum of Committed Values.

If you log in as a Team Lead or a Sales Manager, the worksheet displays the best case, likely case, and worst case forecasts for your direct reports and yourself, if applicable.

a. To view a team member's opportunity, drill down the tree view of the reporting hierarchy that display on the left, and click the person's name.

The person's opportunities for the time period display on the right.

b. To view or edit the details of an opportunity, point the cursor at the down arrow next to the opportunity name.

The Additional Details pop-up displays the account name, probability percentage, and type. Click the Edit icon in the pop-up box to edit the opportunity.

c. To change the estimated best case, likely case, and worst case forecast for yourself or a direct report, enter the amounts in the respective fields.

The system updates the Totals row accordingly.

d. To commit the amounts, click Commit.

e. To enter an amount that is different from the Totals row, enter the numbers in the appropriate fields below the Last Commit Date row and click Commit.

To revert to the committed amounts that reflect your direct reports' estimates, click Copy Values, and select Total Estimated Amounts.

2. To save your changes, click Save Worksheet.

3. To restore the previous values, click Reset Worksheet.

4. To view a chart of your final committed amounts for the past few quarters, click View Chart.

Sales Quotas

After the administrator creates the forecast schedule, managers can set sales quotas for each team member for each time period. This is the sales amount that the individual is expected to meet for the time period. When team members log into Sugar, they can view their quotas in the Forecasts module. If

they have enabled email notifications for themselves, Sugar sends them an email when their manager sets their sales quota.
If you have direct reports, Sugar displays a quota worksheet listing the quota amounts, if any, along with the commit status for the specified time period. If you don’t have direct reports, Sugar displays your assigned quota amount, if any, for the specified time period, without the worksheet.

To set a quota

1. On the Forecasts Worksheet page, click Quotas.

2. On the Quota Home page, select the time period from the drop-down list.

Existing quotas for you and any direct reports display on the page along with the Quota form.

3. Enter information for the following fields:

Name. Select the team member name from the drop-down list.
Amount. Enter the quota amount.
Currency. Select a currency from the drop-down list.
Commit. Select this box to commit the quota.

4. Click Save.

The quota amount displayed in the panel above reflects the change and the status displays as Assigned. If you do not commit the quota, the status displays as Pending.

Viewing Forecast History

The Forecast History page displays a Search sub-panel that allows you to view committed forecasts for a specific period. If you manage a sales team, you can search for the committed amounts for yourself and your team members. If you do not have any direct reports, you can only search for your committed amounts.
To view the forecast history

1. From the Actions list on the Forecasts tab, select the Forecast History option.

This page displays a summary of committed amounts for all forecast time periods.

2. To search for forecasts for a specific time period, select the time period in the drop-down list above, select either My Forecasts or My Team’s Forecasts and click Search.

Quotes

Overview

Use the Quotes module to view and manage quotes for your organization. Quotes specify the quantity and the price per unit for products and services that you offer a customer.

Creating Quotes

You can select a Product from the Product catalog or manually enter information related to a Product that is not in the catalog during Quote creation. When you select from the catalog, Sugar fills in information such as the manufacturer's number and tax class. You can also list individual line items in a Quote. To do this, you will need to first add one or more Product groups and group line items under the appropriate Product group. You cannot modify pricing of line items from the Product catalog but you can modify pricing of line items that you manually enter into the system.

Note: Each Quote line item creates a Product record in the **Products** module.

To create a Quote

1. Select **Create Quote** from the Actions drop-down list on the Quotes tab.

Or, click the Create icon on any page of the Quotes module.
You can also create quotes from the Detail View of an Account, Contact, or Opportunity.

2. Enter information for the following fields on the Quotes page:

Quote Subject. Enter information on the product or service for which you are creating the quote.
Quote Number. Sugar generates a reference number after you save the quote.
Purchase Order Num. Enter the purchase order number if one exists.
Payment Terms. Select the time period within which the customer must pay for the product or service purchased, from this drop-down list.

Opportunity Name. Select the opportunity that resulted in this quote from this drop-down list.
Quote Stage. Select the current stage of the quote's life cycle, such as Draft or Confirmed, from this drop-down list.

Note: You cannot use a custom Stage drop-down list to create a quote.

Valid Until. Click the Calendar icon and select the date until which the quote is valid. The quote expires after the selected date has passed.
Original P.O. Date. Click the Calendar icon and select the date of the original Purchase Order.
Bill to section. Enter the billing and shipping account names and contact names. You can also click Select to choose from the list of existing accounts and contacts.
Address Information section. Sugar automatically populates the address of the selected account. You can modify the address if necessary.
Other section, specify the following information:
Teams. By default, the quote is assigned to the private team of the user who creates the quote. To change the assigned primary team, enter the name of the new team. To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.
Assigned to. Enter the name of the individual you want to assign to the record or click Select to choose from the Users list. By default, this record is assigned to you.
Line Items section. Sugar displays the default currency and tax rate. Select the currency from the Currency drop-down list if what is used in the quote is different from the default. Select the appropriate tax rate for the state from the **Tax Rate** drop-down list.
To enter line items, click Add Group and select or enter one or more products or services for the quote. Input the following details:
Group Name. Name for the product group.
Group Stage. Select the current status of the group such as Draft or Negotiation from this drop-down list.
Add Row. Click this button to add a line item to the group. For more information, see To add a line item to a product group. To delete a line item, click **Remove Row**.
Add Comment. Click this button to add a comment on the group.
Shipping Provider. Select a shipping provider to deliver the product to the customer from this drop-down list.

Note: The administrator specifies the currency, tax rate, and shipping provider information that display in the drop-down lists.

Display Grand Total.Check this box to display the total sum of the products listed in the quote.
Display Line Numbers. Check this box to display line numbers when you save the quote in PDF format.
Description section. Enter a brief description for the quote. This is optional.
Delete Group. Click this button to delete the group.
Click Add Group to add another group.

3. Click Save to create the new quote; click Cancel to return to the Quotes home page without creating the new quote.

After you save the quote, the system displays the Quote's Detail View page. You can print or email the quote as a PDF file from this page. For more information, see To manage quotes and To email a quote.

To add a line item to a Product group

Add a product group as listed in the instructions above and follow the steps listed below:

1. Click **Add Row**.

This displays fields to specify the item information. You can click Add Row again to add another item. Enter the following information:
Quantity. Total number of units for this product.
Product. To manually add a product, enter the product name. To select from the Product Catalog, click **Select** (located next to the Product field) and then choose the item from the Product Catalog List View. This adds the product as a line item in the quote.
Mft Num. Manufacturer's number, if any. If you selected an item from the catalog, the system automatically enters the appropriate number in this field.
Tax Class. Specify whether the product is taxable or non-taxable. If you selected an item from the catalog, the system automatically enters the appropriate information in this field.
Cost. Actual cost of the item. If you selected an item from the catalog, this field is system-populated.

Note: The Cost details do not display in the quote that you email customers. For information on mailing quotes, see To email a quote.

List. List price for the product. If you selected an item from the catalog, this field is system-populated.
Unit Price. Price offered to the customer. This may be lower than the list price.
Discount. Dollar amount or the percentage of the unit price, if a discount is applicable. Check the % checkbox if you entered a percentage.
Sugar calculates and displays the subtotal, discount, tax, shipping and the final billing amount.
You can click **Remove Row** to delete an item from the quote; click OK to confirm the deletion.

Managing Quotes

Managing quotes includes tasks such as editing, deleting, and tracking changes.

To manage Quotes

- To sort a list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To view the details of a quote, click its name in the List View page.
- To edit the quote, on the Detail View page, click **Edit**.
- To update or delete all or some of the quotes in the list, use the Mass Update link in the Actions drop-down list in the List View page. For details, see To edit or delete multiple records.
- To duplicate a quote, click **Duplicate** on the Detail View page. Duplication is a convenient way of creating a similar quote. You can change the information in the duplicate record to create a new quote.

- To delete a quote, click **Delete** on the Detail View page.
- To track changes made to a quote over time, click the **View Change Log** link on the Detail View page.
- To manage records in a sub-panel, see To manage related information in sub-panels.
- To archive a related email, in the Detail View, scroll down to the History sub-panel where related emails are listed and click Archive Email to view the Create Archived Email form. You can copy and paste information related to the email into this form and save it for your records.
- To create a new opportunity for a quote, click **Create Opportunity from Quote** on the Detail View page.

Create a new opportunity related to the quote when you renew an expired quote. This ensures that any opportunity-based forecast reflects the new quote.

- To attach an external file to the quote, click Create Note or Attachment in the History sub-panel.
  - ¢ To add a note, enter the subject and the text, and click Save.
  - ¢ To add an attachment, click the Browse button located next to the Attachment field, and navigate to the file location on your local machine.

The attached file is listed in the History sub-panel on the Quote Detail View page.

- To email the quote in PDF format, click Email as PDF.
- To print the quote in PDF format, click **Print as PDF**. By default, the system prints a proposal. To print an invoice, select Invoice from the PDF Format drop-down list and click **Print as PDF**.

Emailing Quotes

You can generate a PDF document of a quote and email it to the customers directly from the Quotes Detail View.

Note: The administrator must configure your email settings to enable you to send emails.

Check the following settings on your User Preferences page before you generate the PDF:

- Appropriate main font size and data font size in the PDF Settings section is selected.

For other languages such as Japanese, the administrator will have to create the appropriate font as described in PDF.

- Appropriate character set is selected in the Import/Export Character Set drop-down list in the User Preferences section.

On Microsoft Windows, if you are using USD or Western European fonts, you can select ISO-8859-1 (Western European and US) or CP 1252. The default character set in Sugar is UTF 8.

To email a Quote

1. Verify that the quote specifies a contact with a valid email address.

2. Click **E-mail as PDF** on the quote's Detail View page.

Sugar creates a PDF file and attaches it to an outbound email populated with the recipient's email address. The quote omits the Cost (price) but displays the List Price, Unit Price, and the Ext Price (Extended Price). Sugar generates a standard title in the Subject field and a standard message in the Body field; you can edit these if needed.
A reference to this email is displayed in the History sub-panel in the Quotes module and the Contacts module. For more information on emailing documents, see Emails Module.

3. Click Send to email the quote.

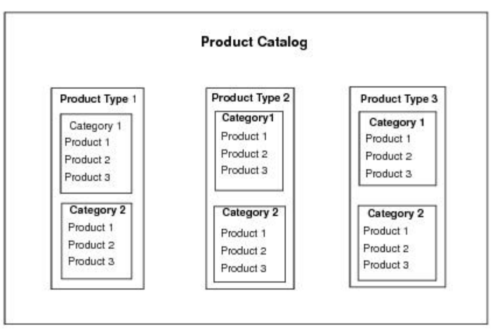
Products

Overview

Use the Products module to define, catalog, and manage products for your organization.
You have the option of selecting an item from the product catalog, or creating a new product that is not in the product catalog.

About Products and Product Catalog

The Products module lists all products that have already been sold or are in the process of being sold.
The Product Catalog displays a list of all the products that your organization sells. By entering products into the product catalog, the sales team will be able to add products to quotes.
The product catalog is a manually maintained list managed by the administrator and groups products into product types. Each product type can consist of several product categories. Each product category can further be grouped into sub-categories. The association between categories and individual records is represented as parent-child relationships in a hierarchical manner. A category is a parent and the individual products are the children. A sub-category is both a parent and a child.
The administrator defines all the product types, categories, and manufacturer information within Sugar.
The following illustration depicts the hierarchy in the product catalog.



Sugar enables you to create a free standing item if your organization does not maintain a product catalog or if you need to define a product that is not in the catalog. Products that you define are not added to the product catalog.

Defining Products

When you define a product, you can select a type and a category from the existing list setup by the administrator. This enables you to group and manage them effectively. You can also associate a product with an account. This enables you to view and edit the product from the account's Detail View page.
The Products home page lists products that you define but not those from the Product Catalog. When you create a quote from the Product Catalog, the records in the quote are automatically added to your products list.
After you define a product, you can link it with a related product in the record's Detail View.

To define a product

1. Select **Create Product** from the Actions drop-down list on the Products tab or click the Create link on any page within the Products module or from a line item within a quote, or from the Detail View of Accounts and Contacts.
2. Enter information for the following fields on the Products page:

Product. Name for the product; or click **Select** to choose from the Product Catalog.
For more information, see To select an item from the Product Catalog.
Status. Select the current status for the related account, such as Shipped or Quoted, from this drop-down list.
Account Name. Input name of the related account or click **Select** and then click the account name to select from the Accounts list.
Quantity. Number that specifies the product quantity for the account.
Serial Number. Product's serial number.
Asset Number. Product's internal inventory number.
Contact Name. Click **Select** to view the Contacts list; click the contact name to add it to the product information.
Purchased. Click the Calendar icon and select the purchase date if the product is being purchased.
Support Starts. Click the Calendar icon and select the date when support begins if your organization provides product support.
Support Expires. Click the Calendar icon and select the date when support stops.
Currency. Select the currency in which the account will pay for the product from this drop-down list.
Cost. Actual cost of the product.
List Price. List price for the product.
Unit Price. Unit price for the product.
Book Value. Amount of the order that was booked, if the account is purchasing the product.
Book Value Date. Date on which the order was booked.
Discount Rate. Discount offered on the product.
Discount in %. Check this box to indicate that discount rate offered is in % format.
Product URL. Web address location if product is available online.
Manufacturer. Select the product manufacturer from this drop-down list.
Mft Part Number. Manufacturer's part number for the product.
Vendor Part Number. Part number for the product if your organization is the vendor.
Tax Class. Specify if the product is taxable from this drop-down list.
Weight. Product weight.
Category. Select the category to which the product belongs from this drop-down list.
Type. Select the product type from this drop-down list.
Description. Brief product description.
Support Title. Title of the Support personnel providing product support.

Support Desc. Brief support description.
Support Contact. Name of user responsible for providing support to the account.
Support Term. Select the term for which support will be provided from this drop-down list.

3. Click Save.

This displays the product in the Products List View.

To select an item from the Product Catalog

1. Click the **Select** button located next to the Product field to select an item.

This displays the Product Catalog page.
The Product Catalog page displays three sub-panels.

- ¢ Search sub-panel enables you to search for a product by name, category, type, or manufacturer.
- ¢ Product Catalog sub-panel displays product categories in a hierarchical manner.
- ¢ Product Catalog List sub-panel displays independent nodes (records) of each product category within the catalog tree. Parent nodes (sub-categories) and their child nodes (records within the sub-categories) are not displayed in the list.

2. To view independent nodes within a product category, click the category name in the Product Catalog sub-panel.
3. To view or drill down a parent node within a category, click + located next to the category name in the Product Catalog sub-panel.

Sugar displays the child nodes in the Product Catalog List when you click a parent node.

4. To select an item, click its name in the Product Catalog list.

This enters the item name in the Product field of the Products page. Other information such as the category, manufacturer, and the manufacturer's part number display in the relevant fields.

Managing Products

Managing products includes tasks such as editing, deleting, importing, and exporting records.

To manage products

- To link a product with related products, click Select in the Related Products section of the product's Detail View. (Note: Products sub-panel has to be enabled by your system admininstrator for display of Related Products.)
  Search for the related product in the Product Search pop-up box, or scroll down to select it from Product List.

- To sort a List View, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple products, select multiple records in the Products List View and click the Mass Update link in the Actions drop-down list. For more information, see To edit or delete multiple records.
- To view the details of a product, click the product name in the Products List View.
- To edit the product details, click **Edit** on the Product Detail View page, update the information and click **Save**.
- To duplicate a product, click **Duplicate** on the Product Detail View page. Duplication is a convenient way of creating a similar product. You can change the information in the duplicate record to create a new product.
- To delete a product, click **Delete** on the Product Detail View page.
- To track changes to a product, click the **View Change Log** link on the Product Detail View page.
- To import product information, click Import Products from the Actions drop-down menu in the Products tab. For more information on importing data, see Importing Data.
- To export information on one or more products, select them in the Product List View, click Export from the Actions drop-down list, and export them as described in To export data from Sugar.
- To manage records in a sub-panel, see To manage related information in sub-panels.

Contracts

Overview

Use the **Contracts** module to create and manage Contracts that you enter into with your customers and vendors.

Using Contracts

The Contracts module lists all existing contracts and associated information such as the account name, contract status, and the primary team assigned to the contract. When you create a contract, it is automatically listed under the related account. It is also listed under the related opportunity and quote, if you specified one.

Note: By default, this module is hidden. The administrator must display it in order to enable you to use it.

A contract can reference multiple documents such as a Master Service Agreement (MSA) and one or more Statements of Work (SOW). The details of any document that is referenced in a contract displays in the Documents sub-panel. Other information such as notes, contact information for individuals involved in managing the contract, product information, and quotes are also displayed in sub-panels on the contract's detail page.

See table below for document details:

Field	Description
Document Name	Name of the document that is related to the Contract.
Template	Select this if the document needs to be signed and saved in Sugar or if you are creating a template, for example Mail Merge templates in Campaigns.
Document Type	Enter the type of document, for example, a License Agreement or a Statement of Work.
Selected Revision	Enter the version number of the Document related to the Contract.

Sign	Selecting the **Template** checkbox displays a Sign icon corresponding to the uploaded document in the Documents sub-panel. Click the Sign icon. This displays a Create Document page. Upload a copy of the signed document in the Create Document page and click Save. This returns you to the Documents sub-panel in the Contracts Detail View page.
Get Latest	The Get Latest icon displays in the Documents sub-panel corresponding to the signed document identifying the uploaded document as the latest (signed) copy of the document.
Edit	Click this icon to edit the document.
Rem	Click this icon to disassociate the Document from the Contract.

The administrator can set up a workflow that automatically triggers alerts and actions based on specified conditions.

Creating Contracts

You can create Contracts only in Sugar. You cannot import Contract data, but you can export it.

Follow the steps listed below to create a Contract:

1. Select Create Contract from the Actions list on the Contracts menu.
   This displays a Create Contract page.
2. Enter information for the following fields on the Create Contracts page:

Panel	Field	Description
Overview	Contract Name	Enter a name for the Contract.
	Reference Code	Enter the internal reference number for the Contract.
	Account Name	Click Select and choose the Account that is related to this contract from the Accounts list.
	Opportunity Name	Enter the Opportunity to which the Contract is related.
	Expiration Notice	Click the Calendar icon and select a date and time to send a reminder to the assigned user that the Contract will expire shortly.

	Status	The contract status indicating whether the contract has been signed or not.
	Start Date	The date on which the Contract takes effect.
	End Date	The date on which the contract ends.
	Currency	Select the currency from the drop-down list.
	Contract Value	The amount specified in the contract.
	Customer Signed Date	The date on which the customer signed the contract.
	Company Signed Date	The date on which your organization signed the contract.
	Description	A brief description of the contract.
Other	Assigned To	Enter the name of the individual you want to assign to the record or click Select to choose from the User List. By default, this record is assigned to you.
	Teams	Select the team that is assigned to manage the contract. To change the primary team assignment from your private team, enter the name of the new primary team. To assign additional teams to the record, click Select to choose new teams from the Teams List, or click Add to add additional team fields and enter the team names. For more information on assigning teams, see Assigning Records to Users and Teams.

3. Click Save.

Managing Contracts

Managing contracts includes tasks such as editing, deleting, and tracking changes made to records.
To manage contracts

- To sort a list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete all or some of the contracts, use the Mass Update panel as described in To edit or delete multiple records.

- To display the details of a contract, click the contract name in the list.
- To edit the details, on the detail page, click **Edit**.
- To duplicate the contract, on the detail page, click **Duplicate**. Duplication is a convenient way of creating a similar contract. You can change the information in the duplicate record to create a new contract.
- To delete the contract, on the detail page, click **Delete**.
- To track changes to account information, on the account detail page, click **View Change Log** below **Edit**.
- To create or manage related record in sub-panels, see To manage related information in sub-panels.

Documents

Overview

Use the Documents module to create and manage files that you share with users and contacts.

Creating Documents

You can create a library of documents and graphics that you can share with other users and contacts, ranging from marketing collateral to contracts. You can also create templates for frequently used documents.
Documents that link to an external account (for example Google Docs, IBM LotusLive) cannot be used as attachments in emails composed through the Sugar Email Client.
To create a document

1. Select Create Document from the Actions drop-down list on the Documents tab or click the Create icon on any page within the Documents module or

Go to the Detail View of any module that has the Documents subpanel (for example, Accounts).

2. Enter information for the following fields on the Documents page:

Source. Select the source of your document, for example Sugar or Google Docs, from this drop-down list. Google Docs needs to be enabled by your system administrator for you to be able to access it in Sugar. If Google Docs is not enabled, contact your system administrator. You may also need to enable Google Docs once the system administrator has allowed you access. For more information, see External Accounts.
File Name. Name of the file you are using to create the document; click **Browse** to navigate to the location of the document.
Document Name. Enter a name for the document.
Document Type. Select a pre-defined document from this drop-down list. If the document does not belong to any of the listed types, select None.
Publish Date. Click the Calendar icon and select the date when the document is published for other users to view and download it.
Expiration Date. Click the Calendar icon and select the date when the validity of the document expires. For example, collateral for a sales campaign may not be useful after the campaign ends.
Status. Select the status from this drop-down list, to indicate the current state of the document such as Draft or Under Review.
Revision. Enter the revision number if you revised this document.
Template. Select this box if you are creating a template.
Category. Select a pre-defined category from this drop-down list. Select None If none of the categories apply.

Sub Category. Select the applicable category subset if you selected a category.
When you select a category and sub-category for the document, the document is added to the Document tree using a hierarchical structure. The tree structure displays in the List View to make it easier to find documents under a specific subject. The administrator defines the category and sub-category values.

3. **Teams**. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

Related Document. Click **Select** to associate a related document.
Related Document Revision. This is auto-populated by the revision number of the associated document.
Description. Enter a brief description of the document.

4. Click **Save** to create the document; click **Cancel** to return to the document list without saving the document.

Managing Documents

Managing documents includes tasks such as editing, deleting, and tracking changes.
To manage documents

- To sort a List View, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple documents, select multiple records in the Documents List View and click the Mass Update link in the Actions drop-down list. For more information, see To edit or delete multiple records.
- To view the details of a document, click the document name in the List View.
- To view an attachment, click the **attachment** link; To update an attachment, see To update an attachment.
- To edit a document, click **Edit** on the Detail View page.
- To duplicate an opportunity, click **Duplicate** on the Detail View page. Duplication is a convenient way of creating a similar document. You can change the information in the duplicate record to create a new document.
- To delete a document, click **Delete** on the Detail View page.
- To export documents, select them from the Documents List View, click Export in the Actions drop-down list and follow the process described in Exporting Data.

- To create or manage related records in a sub-panel, see [To manage related information in sub-panels].

To update an attachment

1. Click Create in the Document Revisions sub-panel of the document's Detail View page.

This displays the Document Revisions >> Create page.

2. Enter information for the following fields:

FileName. Enter the name of the file containing the revised information; to navigate to the file location, click Browse.
Revision. This field is auto-populated with the revision number.
Change Log. Enter a brief description of the revision.

3. Click **Save** to save your changes; click **Cancel** to go back to the document detail page without saving your changes.

You cannot change the name of the attached file. The revised file is displayed along with its revision number in the Documents Revisions sub-panel. The row listing the older document version now displays the rem icon to remove the file.

4. To remove the previous version of the attachment, click the rem icon, and click **OK** to confirm the removal.

Identifying MS Word Mail Merge Templates

You can identify Microsoft Word mail merge templates in the Documents module. These templates are used when a mail-merge is performed directly from within Sugar and can be created from the Sugar Plug-in for Microsoft Word and uploaded to the Sugar document repository.

- The document type displays as Mail Merge on the Detail View page if it is a Mail Merge template.

- A link allows direct access to the Sugar Mail Merge Wizard in the navigation bar.

Calendar

Overview

The Calendar Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the Calendar module to schedule and manage activities such as calls, meetings, and tasks.

Calendar actions

The Actions drop-down list on the Calendar tab displays the following options:
Log Call. Click this option to schedule a call as described in Scheduling Calls
Schedule Meeting. Click this option to schedule a meeting as described in Scheduling Meetings.
Create Task. Click this option to create a task as described in Creating Tasks.
View Calendar. Click this option to view your calendar in different formats and to view other user's calendars as described below.

Using the Calendar

To view your calendar by day, week, month or year, click the appropriate button at the top left of the main screen. Planned activities are displayed along with associated dates, in each format. Sugar enables you to click any activity on your calendar to edit the information.
You can move backwards and forwards in the calendar- by one day, week, month or year. In the week, month or year format, you can click on any date to view it in day format.
You can create a related note or attachment for any scheduled call or meeting. For example, you can add a note summarizing the outcome of a call or a meeting.
In Day format, the calendar lists the hours of the day vertically. You can view a list of existing tasks on the right side of the main calendar body. To view the details of a task, click its subject title.
When you save the information, the system displays the detail page where you can view and manage related information such as contacts and notes.

Viewing Shared Calendars

Users can view each other's calendar in order to schedule appointments. The information that you can view in another user's calendar depends on your team membership. For example, if you have an appointment on your calendar that is assigned to the Global team, all users in your organization will be able to access the appointment details when they view your calendar. However, if the appointment is assigned to your private team, they will only be able to see whether you are free or busy but will not be

able to view the details. If the appointment is assigned to the East team, then only members of that team can view its details.
Managers have permissions to view, edit, and delete their subordinates' appointments. Subordinates can only view their Manager's appointments as free/busy time. Administrators have full access to any user's calendar and the permissions to edit, duplicate, and delete any appointment.
To view shared calendars

1. Click Shared on the Calendar home page.

The page displays the Shared Calendar page.

2. To view a user's calendar, click the Edit icon.

This displays a drop-down list of users and a drop-down list of teams.

3. To view users who belong to a specific team, select the team from the drop-down list.

4. Choose a user and click Select.

This displays the selected user's calendar.

Calls

Overview

The Calls Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the Calls module to log, view, and import calls.

Calls Actions

The Actions drop-down list on the Calls tab displays the following options:
Log Call. Click this option to record the details of a call as described in Scheduling Calls.
View Calls. Click this option to view and manage calls as described in To manage calls.
Import Calls. Click this option to import external data into a note as described in Importing Data.

Scheduling Calls

You can schedule calls with users, contacts, and leads. Scheduling a call in Sugar enables you to create a record of the call along with information regarding the subject of discussion, the participants, the time period, and the status. After you save this information, you can send out an invitation to all the participants immediately or at a later date. You can create a note or add attachments before or after a call occurs. After you complete a call, or if you cancel it for any reason, you can update its status.
When you create the call, the Calls page displays the following sub-panels:
Scheduling. The Scheduling sub-panel displays details such as the name of the attendees, the day, and the time of the call. If other calls are already scheduled, the busy time is blocked out and colored blue. If there are scheduling conflicts, the busy time displays as a brown block.
Add Invitees. You can use the Add Invitees sub-panel to find users that you want to invite as described in To add invitees.

To schedule a call

1. Select Log Call from the Actions drop-down list of the Callstab.

2. Enter information in the following fields:

Subject. Enter the subject of discussion.

Start Date & Time. Click the Calendar icon and select the date or input the data manually. Select the time, in hours and minutes, from the adjoining drop-down lists.
Status. Select one of the following from the drop-down lists:
Inbound. Choose this option if it is an inbound call.
Outbound. Choose this option if it is an outbound call.
Planned. Choose this option if the call is scheduled to take place.
Held. Change the status from Planned to Held after a call is completed.
Not Held. Change the status from Planned to Not Held if a call did not occur for any reason.
Related to. Enter or select the name of the related record such as an account, opportunity or contact from this drop-down list.
When you type a character in the field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results. When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting with "A". Similarly, if the Name display format specifies "s l f", then the system displays last names starting with "A".
Duration. Enter the number of hours in the adjoining box and select the number of minutes from the drop-down list.
Reminder. Select this box and specify the time from the drop-down list to send a reminder when a call is due. The system will send a reminder to all participants at the specified time.
If you set a default time for reminders on your User Preferences page, Sugar will implement it when you do not set a reminder during call creation. This default time displays in the Calls Detail View page and can be modified in the Edit View page.
Description. Enter a brief description of the purpose of the call.
Assigned to. Specify the user who is assigned to the record. By default, it is assigned to you. To assign a different user, click Select to select from the Users list.
Teams. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click Select to choose new teams from the Teams List, or click Add to add additional team fields and enter the team names in the fields.
Description. Enter a brief description of the purpose of the call.
Add Invitees. Enter names of the participants of the call as described in To add invitees.

3. Click Save.

4. Click Send Invites to send an invitation to the participants.

5. To create a copy of the call, click **Close and Create New**.

This closes the original call and changes its status to Held. The new call retains all the information of the original record except for the status, which by default is set to Planned.

To add invitees

1. In the AddInvitees sub-panel of the Call Detail View page, enter all or any of the following information for a user, contact, or lead:

First Name. You can add a letter, a whole name, or a partial name.
Last Name. You can add a letter, a whole name, or a partial name
Email. You can add a letter, a whole address, or a partial address.

2. Click **Search**.

The system displays the search results below with an **Add** button next to each name on the list.

3. Click the appropriate **Add** button to send an invitation to the user.

The list of invitees displays in the Scheduling sub-panel.

Manage Calls

- To sort a List View, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To update information for some or all calls, use the Mass Update panel in the Actions drop-down list of the Calls List View as described in Editing and Deleting Multiple Records.
- To import a list of calls, select Import Calls from the Actions drop-down list of the Calls tab. For more information on importing data, see Importing Data.
- To view the details of a call, click its Subject on the Calls List View.
- To edit a call, click **Edit** on the call's Detail View page, revise the information and click **Save**. Associated information such as Contacts, Users, Leads, and Notes are displayed in sub-panels.
- To duplicate a call, click Duplicate in the call's Detail View page. Duplication is a convenient way of creating a similar activity. You can change the information in the duplicate record to create a new activity.
- To delete a call, click **Delete** on the call's Detail View page**,** and then click **OK**.
- To find a specific call in the list, enter the subject or the contact name in the Search sub-panel above and click **Search**. To search only your records, select the **My items** checkbox.
- To perform an advanced search with additional search filters such as related record, click **Advanced**.
- To edit a related record, click the Edit icon for the related record in the sub-panel of the Detail View, make the changes, and click Save.

- To remove an association with another record, scroll down to the related record in the call's Detail View, click the rem icon, and then click OK.

Meetings

Overview

The **Meetings** Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use this module to schedule, view, and manage meetings. You can use the Sugar Email Archiving feature to send meeting invitations from an external meeting client, include a Sugar email address provided by your Sugar administrator in the attendees list, and view the meeting records in Sugar.

Meetings Actions

The **Actions** drop-down list on the **Meetings** tab displays the following options:

> **Schedule Meeting**. Click this option to schedule a meeting as described in Scheduling Meetings.
>
> **View Meetings**. Click this option to view and manage meetings as described in To manage meetings.
>
> **Import Meetings**. Click this option to import external data as described in Importing Data.

Scheduling Meetings

You can schedule meetings with users, contacts, and leads. When you schedule a call or a meeting, you are creating a record with information regarding the subject of discussion, the participants, the time period, and the status. After you save this information, you can send out an invitation to all the participants immediately or at a later date. You can create a note or add attachments before or after a meeting occurs. After you complete meeting, or if you cancel it for any reason, you can update its status.

The **Create** (Meetings) page displays the following sub-panels:

Scheduling. The **Scheduling** sub-panel displays details such as the name of the attendees, the day, and the time of the meeting. If other meetings are already scheduled, the busy time is blocked out and colored blue. If there are scheduling conflicts, the busy time displays as a brown block.

Add Invitees. Use the **Add Invitees** sub-panel to find users that you want to invite as described in **To add invitees**.

To schedule a meeting

1. Select **Schedule Meeting** from the <sstrong>Actions drop-down list of the **Meetings** tab.</sstrong>

2. Enter information in the following fields:

Subject. Enter the subject of discussion.
Status. Select one of the following from the drop-down lists:
Planned. Choose this option if the meeting is scheduled to take place.
Held. Change the status from **Planned** to **Held** after the meeting is completed.
Not Held. Change the status from **Planned** to **Not Held** if the meeting did not occur for any reason.
Meeting Type. Select Sugar, GoToMeeting, or WebEx from this drop-down list to indicate the type of meeting. External Accounts like GoToMeeting and WebEx need to be activated by your administrator and added by you, for these to display in the Meeting Type drop-down list. For more information, see External Accounts.
Start Date. Click the Calendar icon and select the date or input the data manually. Select the time, in hours and minutes, from the adjoining drop-down lists.
Related to. Enter or select the name of the related record such as an account, opportunity or contact from this drop-down list.
When you type a character in the field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results. When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting with "A". Similarly, if the Name display format specifies "s l f", then the system displays last names starting with "A".
If you set a default time for reminders on your User Preferences page, Sugar will implement it in the event that you do not set a reminder when you create a call or meeting. The default time will display in the Detail View after you save the record. You can change it in the Edit View.
Duration. Enter the number of hours in the adjoining box and select the number of minutes from the drop-down list.
Location. Enter the meeting location.
Reminder. Select this box and specify the time from the drop-down list to send a reminder when a meeting is due. The system will send a reminder to all participants at the specified time.
If you set a default time for reminders on your User Preferences page, Sugar will implement it when you do not set a reminder during meeting creation. This default time displays in the Meeting Detail View page and can be modified in the Edit View page.
Description. Enter a brief description for the purpose of the meeting.
Assigned to. Specify the user who is assigned to the record. By default, it is assigned to you. To assign a different user, click Select to select from the Users list.

Teams. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click Select to choose new teams from the Teams List, or click Add to add additional team fields and enter the team names in the fields.
Add Invitees. Enter names of the participants of the meeting as described in To add invitees.

Click **Save** to save the meeting details without sending meeting invitations.
OR, click **Save & Send Invites** to save the Meeting details and send a meeting invitation.

3. OR, click **Close and Create New** to create a copy of the Meeting.
This closes the original meeting and changes its status to **Held**. The new meeting retains all the information of the original record except for the status, which by default is set to **Planned**.

Note: For WebEx meetings, two invitations are sent to each meeting invitee - one sent by Sugar, the other sent by WebEx. For all other meeting types (IBM LotusLive, GoToMeeting and Sugar), only Sugar sends the meeting invitations.

To add invitees

1. Enter all or any of the following information for a user, contact, or lead in the AddInvitees sub-panel of the Create (Meeting) page:

First Name. You can add a letter, a whole name, or a partial name.
Last Name. You can add a letter, a whole name, or a partial name
Email. You can add a letter, a whole address, or a partial address.

2. Click **Search**.

The system displays the search results below with an **Add** button next to each name on the list.

3. Click the appropriate **Add** button to send an invitation to the user.

The list of invitees displays in the Scheduling sub-panel.

Manage Meetings

- To sort a List View, click any column title which has the
icon beside it; to reverse the sort order, click the column title again.
- To update information for some or all meetings, use the Mass Update panel in the Actions drop-down list of the Meetings List View as described in Editing and Deleting Multiple Records.
- To import a list of meetings, select Import Meetings from the Actions drop-down list of the Meetings tab. For more information on importing data, see Importing Data.
- To view the details of a meeting, click its Subject on the Meetings List View.

- To edit a meeting, click **Edit** on the meeting’s Detail View page, revise the information and click **Save**. Associated information such as Contacts, Users, Leads, and Notes are displayed in sub-panels.
- To duplicate a meeting, click Duplicate in the meeting’s Detail View page. Duplication is a convenient way of creating a similar activity. You can change the information in the duplicate record to create a new activity.
- To delete a meeting, click **Delete** on the meeting’s Detail View page**,** and then click **OK**.
- To find a specific meeting in the list, enter the subject or the contact name in the Search sub-panel above and click **Search**. To search only your records, select the **My items** checkbox.
- To perform an advanced search with additional search filters such as related record, click **Advanced**.
- To edit a related record, click the Edit icon for the related record in the sub-panel of the Detail View, make the changes, and click Save.
- To remove an association with another record, scroll down to the related record in the meeting’s Detail View, click the rem icon, and then click OK.

Sugar Email Archiving (a.k.a. SNIP)

You can include the Sugar Email Archiving email address in the list of invitees when you send meeting invitations from an external meeting client and view meeting records as Activity or History in Sugar for the following person-type modules:

- Contacts
- Users
- Leads

Meeting invitations sent from an external meeting client can also be viewed in the following two modules:

- Calendars
- Meetings

The following objectives are covered in this section:

- Send meeting invitation using Sugar Email Archiving
- View meeting sent to Sugar-provided email address in record’s Detail View

Send meeting invitation using Sugar Email Archiving

You can send meeting invitations to Sugar records from any external client and view the meetings associated to records in Sugar.

1. Log into your external calendar client such as MS Outlook, iCal, Google Calendar etc.
2. Create a meeting invite to send to a Sugar record (Contact, Lead, or Opportunity).
3. Include the Sugar Email Archiving email address provided by your Sugar administrator in the To or Attendees field.

(Optionally) Include the [CASE:{number}] in the subject line and the email address of a contact related to the case, to associate the case to the meeting.

4. Complete the meeting invitation and send.

View the meeting invitation in Sugar

Follow the steps listed below to view the meeting, sent from an external client, in Sugar:

1. Log into Sugar.
2. Go to the Calendar module to view the meeting record.

You can also view the meeting in the Activities sub-panel of the Detail View page of the record, for example Leads, that you have sent the meeting invitation to.

If you are using a meeting client that is also an email client, for example MS Outlook, an email message is sent along with the meeting invitation. You can view this email in the History and Related Contacts’ Email sub-panels of the Detail View page of the record that you have sent the meeting invitation to.

Emails

Overview

The **Emails** module enables individual users to send and receive emails from within Sugar.

Email actions

You can use the **Emails** module for the following tasks:

- Compose and send emails
- View and process emails on external mail servers without downloading them into the Sugar database
- Import emails into the Sugar database for necessary action
- Associate an imported email with a related Sugar record such as a bug or an account to create a communication thread for future reference
- Create a related record, such as a bug, from an email
- Search for imported emails based on specific parameters

Options to check for incoming emails, compose emails, and configure mail settings display at the top of the Emails home page. The page is divided into panels: the left panel contains the Folders list and the Search field; the top half of the right panel lists emails, and the bottom half of the right panel displays the contents of the email that you select from the list above.

Configuring Email Settings

Settings in Emails enable you to manage how you view and compose emails. Some settings are pre-configured with default values. Other settings are optional. You can customize these settings to suit your requirements.

Sugar supports the IMAP protocol for viewing emails in your external mail accounts and for sending emails composed in Sugar. Using IMAP enables you to access IMAP folders selectively on the mail server in Sugar.

The Settings window displays tabs for General settings and for Mail Account settings.

General Settings

The General Settings tab (within the Settings tab) displays options to specify the character set, signature, automatic/manual checks for incoming emails and so on. Some of these settings have default values which you can modify. General Settings apply to all your personal mail accounts in Sugar.

Follow the steps listed below to specify General Settings:

1. Click the **Settings** tab at the top of the page.
   This opens the **Settings** pop-up box.
2. Enter values for any of the following fields in the Settings pop-up box:

Field	Details

Check for New Mail	Select a time interval from this drop-down list if you want the system to check your mail accounts for new emails. The default setting is to check emails manually.
Send Plain Text Emails Only	Check this box to send emails in plain text format instead of the default HTML format.
Character Set	Specify the default character set for outbound emails from this drop-down list.
Signatures	Select an existing signature for your outbound emails from this drop-down lists. To create a signature, click Create located next to the Signature field, enter a name for the signature, input text for the signature and click Save. To use a signature image file located on a hosted website, click the Insert Image icon on the HTML toolbar, and enter the URL.
Signature above reply	Select this box to place your signature above the content of the email to which you are responding.
Emails per Page	Specify the number of emails that you want displayed per page in the pane containing the email list. The email list is paginated to enable you to view the specified number of emails within each page.
Folder Management	This section displays sub-folders in the My Emails folder, along with the default folders My Drafts and Sent Emails. Highlight the folders that you want displayed in the Folders tab.

3. Click **Done** to save your preferences.

Mail Accounts

You can create one or more personal mail accounts in Sugar to view emails from your external mail accounts in Sugar. You can import these emails into Sugar if needed.

Group mail accounts are used to view and distribute emails addressed to the organization rather than an individual user. Only administrators can set up group mail accounts. Administrators and users can view and distribute these emails for necessary action. As a user, you can subscribe to agroup mail accountthat is assigned to a team of which you are a member.

For outbound emails, the administrator can setup a default SMTP server that you can use to send mails. You can also specify a different SMTP server. The administrator can specify the email address, user name, and password for all users. You can change this information to suit your requirements. Your User page displays your default settings.

Creating a mail account

Follow the steps listed below to create a mail account:

1. Click **Settings** at the top of the page.
   This displays the **Settings** window.
2. Click the **Mail Accounts** tab in the **Settings** window.
3. Click **Add** in the **Mail Accounts** section.
   This displays the **Mail Account Properties** page.
4. Enter information for the following fields in the **Incoming Email** section:

Field	Hidden field	Details
Mail Account Name		Enter a name for the mail account in Sugar.
User Name		Enter the username of your external mail account.
Password		Enter the password of your external mail account.
Mail Server Address		Click Prefill Gmail Defaults to autofill the mail server address, port number, and protocol to access a Gmail account. For other accounts, such as Yahoo, enter the address of the external email server from which emails will be viewed in Sugar.
Mail Server Protocol		Mail Server Protocol. Select IMAP from this drop-down list. This displays the fields listed below.
	Monitored Folders	By default, the system monitors the Inbox. To monitor other folders, click Select and view a list of available folders in the external mail account. To select multiple folders, press SHIFT or CONTROL on your keyboard.
	Trash Folder	Click Select to choose a Trash folder from the Folders list.
	Sent Folder	Click Select to add a folder to view your outbound emails.
Use SSL		If your mail server supports secure socket connections, selecting this box will force SSL connections when importing emails

		into Sugar. This box is automatically selected when you click the Prefill GmailTM Defaults link.
Mail Server Port		The system auto-populates this field with the IMAP port number.

5. Click **Test Settings** to ensure that the specified information is correct. An error message is displayed if errors are detected.
6. Enter the following information in the Outgoing Email section:

Field	Details
From Name	This field is auto-populated with your first and last names.
From Address	Enter the email address you want to display in the From field of emails that you send.
Reply to Address	Enter information in this field if you want responses to your emails to be directed to an email address other than the one specified in your incoming email account.
Outgoing SMTP Mail Server	Select an existing SMTP server from the drop-down list or select Add to specify a new SMTP server. For more information, see Adding a mail server for outbound emails.

7. Click Done to create the mail account.
   This displays the mail account in the **Mail Accounts** table in the **Settings** window. The outbound mail server that you specified displays below in the **Outgoing SMTP Mail Servers** section.
   All mail accounts that you create are listed in the **Mail Accounts** tab of the **Settings** page, and are marked active by default. Group mail accounts that you are allowed to access also appear in this list. When you deactivate a mail account, the account is not listed on the **Folders** tab and emails from that account will not display in the Sugar inbox.
8. To specify a default mail account, select the **Default** button corresponding to the mail account name. The **From** name and email address associated with the default mail account are used when you compose emails in Sugar.
9. To create another mail account, click **Add** in the **Mail Accounts** panel in the **Settings** window and repeat the process described above. If not, click **Done** to close the **Settings** page.
10. To edit or delete a mail account or an outgoing mail server, click the Edit icon or the Delete icon respectively. You cannot delete Group mail accounts.

Adding a mail server for outbound emails

1. Click the **Add** button located below the **Outgoing Mail Server** list.
   This displays the **Outbound Mail Server Properties** page. You can select Gmail, Yahoo!, Exchange, or Other.
2. Add the applicable server:
   - To add the Gmail server or the Yahoo! server, click the appropriate button, and enter the email address and password in the fields below.
   - To add an Exchange server or a different server, click Exchange or Other respectively, and enter the server name
3. If the mail server requires authentication to send out emails, select the **Use SMTP Authentication?** box, and enter the user name and password in the fields below.
4. To check if the outgoing email settings are correct, click **Send Test Email.**
   If the settings are incorrect, Sugar displays an error message.
5. Click **Done** to add the mail server.
   The mail server displays in the **Outgoing Mail Server** drop-down list on the **Mail Accounts** tab.

Managing mail accounts

- To view incoming emails in your inbox, click **Check Mail** while viewing the inbox or right-click the mail account and select **Check Mail**.
- To mark the email as read, unread, flagged, or unflagged, select the email, right-click, and select **Mark** and then select the appropriate option.
- To refresh the mail account view, right-click the account, and select **Synchronize**.
- To delete the mail account, right-click the account, and select **Delete Folder**.
- To rename the mail account, right-click the account and select **Rename Folder**. Enter a new name in the Mail Account Name field and click **OK**.
- To empty the Trash folder, right-click the account and select **Empty Trash**.
- To clear the email cache directory in Sugar, click **Clear Cache Files**.

Email Folders

A folder can be an inbox or a local folder. The system displays inboxes and users can create local folders. Sugar automatically creates a folder for every mail account that you configure. Emails in these folders reside on the mail server of the associated mail account. All emails in your local folders reside in the Sugar database.

Sugar provides a local folder named My Email containing emails that are imported into Sugar and those that are assigned to you, your teams,and your direct reports reside. The two sub-folders, My Drafts and My Sent Emails, contain your email drafts and emails that you sent out, respectively. To group and store imported emails, you can create additional local folders.

Sugar lists folders in the General tab of the Settings window. In order to view a folder in the Folders tab of the Emails home page, you must select it in the General tab.

Creating a folder

1. To create a local folder in Sugar, right-click **My Email** and select **Create Folder** in the **Folders** tab. The **Add New Folder** dialog box displays on the page.
2. Enter a name for the folder and click **OK**.
   The new local folder is now listed under **Folders** in the left-hand panel. This folder is not associated with any of your mail accounts. You can import emails into this folder from any of your mail accounts.
3. To create a new folder for an external mail account, select the account's inbox in the **Folders** tab, right-click, and select **Create Folder**; click **OK**.
4. To create a sub-folder, select an existing folder in the account, right-click, select **Create Folder**, and click **OK**. Alternatively, drag the folder and drop it into the other folder in the account.

Managing accounts and folders

- To check for new mail in your external mail account, right-click the account in Sugar, and select **Check Mail**.
- To synchronize the contents of your external mail accounts with the view in Sugar, select the account, right-click, and select **Synchronize**.
- To delete a folder, select it, right-click, and choose **Delete Folder**. Click **OK** to confirm the action.
- To rename a folder, select it, right-click, and choose **Rename Folder**. Enter the new name in the **Rename Folder** window and click **OK** to confirm the action.
- To remove deleted emails from the account's trash bin, right-click the account or one of the folders, and select **Empty Trash**.

Composing and Managing Emails

When you compose an email, if you have configured multiple mail accounts, you can choose the account from which to send the email. By default, the system uses the signature and character set specified on the General tab of the Settings window, and assigns the email to your default teams as specified in your User Preferences. When composing an email, you can also assign it to a different team,specify an email template and change the signature. You can associate an email with another record when you compose the email, or after you send it out.

To compose an email without leaving a record's List View or Detail View, use the Quick Compose form. To access this form, click the record's email address in a module's List View, the record's Detail View, or the Compose Email button in the Activities sub-panel of the record's Detail View.

Composing an Email

1. Click **Compose Email** on the Emails Home page.
   Or, click the email address from a module's List View or a record's Detail View.
   Or, click the **Compose Email** button in the **Activities** sub-panel of a record's Detail View.
   Or, use the Quick Create links in the navigation bar.
   This displays the Quick Compose Email form.
2. Populate fields in the **Compose Email** page using information in the table below:

Field	Description
From	To route the email through a specific mail account, click the down arrow to select an existing one from the drop-down listTo route the email through a specific mail account. The list contains all the outbound mail account servers set up by you or the System Administrator.
To	Click this button to select recipients from the address book, or manually enter the names of the recipients in this field. For more information on the address book, see Using the Address Book. To send a copy of the email to other individuals, click Add CC and enter their email addresses in the CC field, or click the CC button to add recipients from the address book. To send a blind copy of the email to other individuals, click Add BCC and enter their names in the BCC field, or click the BCC button to select recipients from the address book.
Subject	Enter the subject of the email.
Body	Enter the email text in the Body field. To apply standard formatting options such as font face, size, bold, italics, indentation and color, highlight the text and click the appropriate buttons on the toolbar. You can select the desired style, format, and font from the appropriate drop-down list.

3. To send the email in plain text, click the **Options** tab in the right-hand panel and select the **Send in Plain Text** box.
4. Click **Attach Files** to attach a file to the email.
   The Attach options display in the right panel.
   To select a file from your local machine, click **Add File** and click **Browse** to navigate to the file location;
   To attach a file located in the Sugar repository, click **Add Documents** and click **Select** to choose the document from the Document List.
   To remove the document, click **Remove**.
5. To populate the email with the contents of an email template, click Options and select from the Templates drop-down list in the Options panel. For more information, see Creating Email Templates.
6. To change the signature from the default, in the **Options** panel, select the signature from the **Signatures** drop-down list.
7. To associate the email with a related record, select the module from the **Relate to** drop-down list located at the top of the page, and then click **Select** to specify the record from the module's List View.
   When you type a character in a field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results.
   When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting with "A". Similarly, if the Name display format specifies "s l f", then the system displays last names starting with "A".

8. To send the email, click **Send**; to save the email as a draft, click **Save Draft**. The saved drafts appear in the **My Drafts** folder.
   After you send the email, to view its related records, select it in the **Sent Emails** folder, right-click, and click **View Relationships**. Sugar displays the email's record page, which lists related records such as accounts, contacts, attachments and so on. You can view existing relationships and create new ones from this page.

Viewing and managing emails in the Sugar inbox

- To check for new emails in a personal email account, select the account and click **Check Mail.**
- To view an email in the panel below, select it in the List View and click it once. To view an email in a separate tab, double-click it in the List View.
- Right-click an email in the inbox to perform any of the following actions:
  - To import the email, open the email and click **Import to Sugar**. Alternatively, select the email in the List View, right-click, and select **Import to Sugar**. For more information, see Importing Emails into Sugar.
  - To respond to the email, select **Reply**.
  - To respond to all recipients of the email, select **Reply All**.
  - To forward it to another individual, select **Forward** and enter the email address of the recipient.
  - To delete an email when you view it, click **Delete**; to delete multiple emails, select them from the email list and click **Delete**.
  - To print the email, click **Print**.
  - To mark an email as unread, read, flagged, or unflagged, select **Mark**, and choose the option of your choice.
- To view multiple emails, select two or more emails from the list, right-click, and select **Open Multiple Messages**.
- To create a record from the email, open the email and select the record type from the **Quick Create** drop-down list. For more information, see Creating a record from an imported email.
- To view the email header information or the raw email text for debugging purposes, click **View** and select **Display Headers** and **Display Raw Email** respectively from the drop-down menu.
- To update information such as email assignments and status change for multiple emails, select them from the Emails list and use the **Mass Update** panel as described in Editing and Deleting Multiple Records.
- To assign an imported email, select it from the list, right-click, and select **Assign To**. See Assigning emails to users and teams for more information.
- To associate an email with another Sugar record, select the email from the Group mail inbox, right-click, and select **Relate**. See Associating Imported Emails with Other Sugar Records for more information.

Using the Address Book

When composing an email, you can select email recipients from the address book, which lists existing users, contacts, leads, targets, and accounts. By default, all of these individuals are listed in the address book. However, you can filter the list if you want to view a specific group such as contacts or users. You can also search for an individual by first name, last name, email address, or account name.

Follow the steps listed below to use the Address Book:

1. Click the **To** button on the **Compose Email** page to view the Address Book.
   This displays the **Address Book**. If the list is paginated, the page number display below. You can click the right arrow to move to the next page or the left arrow to move to the previous page. You can also click a page number to go directly to that page. To move to the first page, click the double-left arrow and to move to the last page, click the double-right arrow.
2. To select email recipients, select them in the address book and click **Add To**. To add recipients to the CC list, click **Add To CC**; to add recipients to the BCC list, select **Add To BCC**.
   This displays the recipients in the **Selected** column.
3. To filter the listings displayed in the address book, select the filter from the **Recipient Type** drop-down list.
   The address book listing changes to display only the specified individuals.
4. To search for an individual, enter a letter or a keyword such as first name, last name, email address, or account name in the Search field and click the adjacent button. When you enter a letter, Sugar will display all first names, last names, and account names that start with that letter.

Importing Emails into Sugar

Importing emails from external mail accounts or from email clients, such as Microsoft Outlook, enables you to manage them in Sugar. You can assign imported emails to other users for follow-up, and relate them to records. Imported emails display in the My Emails folder. You can also view unread imported emails in the My Emails Dashlet, if you can add it to your Home page.

Follow the steps listed below to import emails to Sugar:

1. On the Folders tab, click the inbox of your external mail account in Sugar.
2. Select the emails that you want to import, right-click, and select **Import to Sugar**.
   Alternatively, drag the email from the list to a local folder.
   This displays the **Import Settings** window.
3. Enter information for the following fields:

Field	Description
Teams	The email record is, by default, assigned to your default team specified in your User Preferences page.
Assigned To	To assign it to a different user, click Select to select from the Users List View.
Relate To	To relate the email to another record, select the module from the drop-down list, and then click Select to select the record from the module’s List View.

Delete message from server	Select this box to delete the email from the external email server after you import it to Sugar.

4. Click **Import to Sugar**.
   This displays a message after the email has been successfully imported. The import email now displays in your My Emails folder.

Assigning emails to users and teams

Follow the steps listed below to assign one or more imported emails from your My Emails folder or from a Group account to a different useror team:

1. Select the email from the list, right-click, and select Assign To.
   This displays the **Assign To** dialog box.
2. To assign a user, click the Select button adjacent to the Assigned To field, and choose from the list of existing users.
   The selected user's name displays in the **Assigned To** field.
   To assign a team, click the **Select** button above the **Teams** field. You can assign more than one team. The first team on the list is the primary team by default. You can change the primary team if needed.
3. To change an assigned user or team, select Replace and then click the appropriate Select checkbox to choose a different user or team.
4. Click **Assign**.
   The emails no longer display in your My Emails folder or the Group account folder, but instead, appear in the My Emails folder of the assigned user.

Searching for Imported Emails

You can search for imported emails using one or more of the following fields: Subject, From, To, Date From, Date Until, Relate To, Assigned To, and Attachment. The Date From and Date Until time range applies to emails that were sent as well as emails that were received.

Follow the steps listed below to search for imported emails in Sugar:

1. Navigate to the **Search** tab located in the left-hand panel of the **Emails** home page.
   The **Subject**, **From**, and **To** fields display in the panel. Click **More** to view all the Search fields.
2. Enter the appropriate information to search for imported emails in the system.
3. Click **Search**.
   The search results display imported emails assigned to you and your direct reports in the List View.

Associating Imported Emails with other Sugar records

You can associate an email with records in other modules, such as accounts, contacts, and bugs, during any of the following processes:

- **Importing emails**: In the **Import Settings** window, you can select a record from another module using the **Relate To** drop-down list and the adjacent field.
- **Viewing emails**: When you open an email, click the Quick Create drop-down list to select the record that you want to create, such as a bug, case, contact, lead, or task. Sugar creates the new record and associates it with the email. Related emails are listed in the History sub-panel of the record's Detail View.
  Alternatively, select the email from the list, right-click, and select **Relate**. In the **Relate Email** window, select the module from the **Related To** drop-down list, and click **Select** to choose the record with which to relate the email.
- **Composing emails**: You can use the **Relate To** drop-down list and adjacent field, located at the top of the page, to select a record from another module.

Relating an email with another record

1. Select the email from the list, right-click, and select **Relate**.
   This displays the **Relate Email** dialog box.
2. Select the record type from **Relate To** drop-down list, and click **Select** to view the list of records and choose one.
3. Click **Relate** to create the association.
   The email is now associated with the selected records and is listed in the **History** panel of the record's Detail View page.

Creating a record from an imported email

1. To create a record such as a bug or a case, open the email, click Quick Create, and select the record type from the drop-down list.
   The appropriate Quick Create form displays on the screen. The screen illustrated below displays the Quick Create form to create a lead.
2. Enter the necessary information and click Save to create the record.
   If you have not already imported the email, it will be imported and associated with the new record when you use Quick Create to create the record.

Creating Email Templates

You can use email templates to create form letters for automated email responses to inbound emails and for email campaigns. For example, when you receive an email regarding a bug or a case, you can send out an automatic reply stating that the matter will be addressed.

For email campaigns, you enter the message in the template and then specify the variables such as the target names and addresses from the campaign target list. The system inserts these variables into the template to create a personalized email for each target. When you create an email template, you can embed images and attach files from the Sugar repository or from your local file system.

When you create a template for an email campaign, you can insert tracker URLs into the template to track campaign activity. For more information on email campaigns, see Executing an Email Campaign.

Follow the steps listed below to create an email template:

1. Select **Create Email Template** from the **Actions** drop-down list on the **Emails** menu.
   If you are creating an email template for email campaigns, navigate to the Email Marketing record from an Email or Newsletter campaign's Detail View, and click the Create link that is located next to the Email Template field.
2. Enter information for the following fields:

Field	Description
Name	Enter a name for the template.
Team	Select the team that is allowed to view the template from this drop-down lists.
Assigned to	To assign the template to a user, click the arrow button and select from the Users list.
Description	Enter a brief description about the template.
Insert Variable	Select the record (for example Contact) from the drop-down list and select a field such as Name and click Insert. This displays the variable in the **Body** field.
Insert Tracker URL	This field displays only when you create the template from the email marketing record of an email campaign. Select the tracker URL from the drop-down list to insert and click **Insert URL Reference**. The **Body** field displays a link named **Default link text**. The adjoining field displays the tracker name for plain text format. Use this if you want to display the email in plain text format.
Subject	Enter the title of the message.
Body	Enter the email message. You can also embed images and add URL links. To view and use the HTML editor, click HTML in the Body field. To apply standard formatting options such as font face, size, bold, italics, indentation and color, highlight the text and select the appropriate option in the Body field.
Send Text only	Select this box to display the email in plain text format. You can choose this option if an email client cannot render HTML code.

Attachments	To attach a file, click **Browse** to navigate to its location on your local machine, and select it. To attach an existing document from the **Documents** module, click **Sugar Document** and select it from the **Document List**. Documents that link to an external account, for example, Google Docs, IBM LotusLive etc, cannot be used as attachments in emails composed through the Sugar Email client. To embed an image file in the template, click the paper clip icon that displays next to the file; to remove the attachment, click the Remove button.

3. Click **Save**.

Managing email templates

- To search for a template, enter the name or description in the **Search** sub-panel on the **Email Templates** page, and click **Search**.
- To view the details of a template, click the template name from the list on the **Email Templates** page.
- To edit the template, on the detail page, click **Edit**, make the changes, and click **Save**.
- To duplicate the template, on the detail page, click **Duplicate** and click **Save**.
- To delete the template, on the detail page, click **Delete**; to delete some or all the templates, select them from the list on the **Email Templates Home** page, and click **Delete**.
- To export one or more templates, select the templates from the list on the **Email Templates Home** page, and click **Export**.
- To deselect templates that you selected in the list, click **Clear All**.

Sugar Email Archiving (a.k.a. SNIP)

Sugar Email Archiving is an automatic email importing service that allows users to import emails into Sugar by sending them from any mail client or service to a Sugar-provided email address. Each Sugar instance has its own unique Sugar Email Archiving mailbox. To import emails, a user sends or forwards to the unique Sugar Email Archiving email address using the TO, CC, BCC fields. The Sugar Email Archiving service will import the email into the Sugar instance. The service imports the email, along with any attachments, images and Calendar events, and creates records within the application that are associated with existing records by matching email addresses.

For example, the Account Detail View page displays all emails associated to the Account and all emails associated with Contacts related to the Account in the History sub-panel. This includes all emails archived prior to the 6.5 upgrade.

Emails can be sent to the Sugar Email Archiving address and viewed in the History sub-panels in Detail View pages for the following modules:

- Accounts
- Contacts
- Leads
- Opportunities
- Cases

Note: If the email client is configured to use non-English **From**, **To**, and **CC** fields, forwarding emails inline to SNIP may not work. Send the email to SNIP directly using the **CC** and **BCC** fields or forward the email as an attachment. For large volume of non-English emails that need to be archived using SNIP, set a rule in your email application to copy the emails to the SNIP email address.

Send email using Sugar Email Archiving

You can send email to Sugar records from any external email client and view the emails associated to records in Sugar. Before sending an email to the Sugar Email Archiving address, note the following:

- The Sugar record that you are emailing to, must have a valid email address
- The Contact must be related to the Account for the sent email to display in the History sub-panel
- Emails and meeting invites with [CASE:{number}], for example [CASE:A34251], in the subject attach to the respective case, if a Contact associated to the Case is included in the email or meeting invite.

Follow the steps listed below to send emails using Sugar Email Archiving:

1. Log into your external email application such as MS Outlook, Yahoo, Gmail, AOL etc.
2. Create an email message to send to a Sugar record (Account, Contact, Lead, Opportunity, or Case).
3. Include the Sugar Email Archiving address provided by your Sugar administrator in either the To, CC, or BCC field.
   (Optionally) Include the [CASE:{number}] in the subject line and the email address of a contact related to the case, to associate a case to the email message.
4. Complete the email message and send.

View the email in Sugar

Follow the steps listed below to view the email, sent from an external email client, in Sugar:

1. Log into Sugar.
2. Go to the Detail View page of the record, for example Accounts, that you have emailed to.
   The email is listed in the History sub-panel of the Account's Detail View page.
   If the email was sent to an Account and a Contact related to the Account, the email record is displayed in the History sub-panel of the Account's Detail View page and in the History sub-panel of the Contact's Detail View page.

For Cases module, the email record is displayed in the History sub-panel in the Case Detail View page, and in the History sub-panel of the Contact's Detail View page.

3. Click the Subject link for the email.
   The email record displays as an Inbound Email.

All archived emails are also displayed in the Emails module (My Archive sub-folder in the My Emails folder).

iCalendar support

Emails with **.ics** meeting attachments sent to SNIP are parsed by Sugar. The Meeting record is created and for every email that is invited to the meeting, if User, Contact or Lead record exists matching this email, this record is added to the list of invitees for the meeting.

Tasks

Overview

The Tasks Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the this module to schedule and manage tasks.

Task actions

The Actions drop-down list on the Tasks tab displays the following options:
Create Task. Select this option to create a task as described in Creating Tasks.
View Tasks. Select this option to view and manage tasks as described in To manage tasks.
Import Tasks. Select this option to import external data into a note as described in Importing Data.

Creating Tasks

Sugar enables you to create tasks and assign them to yourself or to other users. When you create a task, you can relate it to a specific record such as an account or an opportunity. You can also revise the task status and priority at any time to keep your records up-to-date.
To create a task

1. Select **Create Task** from the Actions drop-down list on the Taskstab.

2. Enter information in the following fields on the Tasks page:

Subject. Enter the subject of the task.
Status. Select the current status of the task, such as Not Started, In Progress, and Completed from this drop-down list.
Start Date. Click the Calendar icon and select the start date for the task; When you enter a date, you must also select the time, in hours and minutes, from the adjoining drop-down lists. If there is no specific start date for the task, select the **None** box.
Due Date. Click the Calendar icon and select the completion date for the task; enter the time in the adjoining box. If there is no specific deadline for the task, select the **None** box.
Enter the due date information if you want to add the task on your calendar to receive a reminder when it is due.
Priority. Select a priority that reflects the importance of completing the task from this drop-down list.
Description. Enter a brief description of the task.
Related to. Enter the name of the related account or click Select to search for one. You can choose related record from other modules, for example, Opportunities, Bug Tracker etc., from this drop-down list.

When you type a character in the field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results. When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting with "A". Similarly, if the Name display format specifies "s l f", then the system displays last names starting with "A".
Contact Name. Click **Select** to select an individual from the Contacts list. Typically, this is the contact for the specified account.
Assigned to. Click **Select** to select the individual who is assigned to the task. By default, it is assigned to you.
Teams. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click Select to choose new teams from the Teams List, or click Add to add additional team fields and enter the team names. For more information on assigning teams, see Assigning Records to Users and Teams.

3. Click **Save**.

4. To change the status of the task to Completed and create a new one, click **Close and Create New**. The status of the new task, by default, is set to Not Started.

Managing Tasks

- To edit or delete multiple tasks, use the Mass Update panel in the Actions drop-down list in the Tasks List View as described in Editing and Deleting Multiple Records.

- To view the details of a task, click its subject in the Tasks List View.

- To edit the information, click **Edit** on the task's Detail View page, revise the information, and click **Save**.

- To duplicate the information, click **Duplicate** on the task's Detail View page, make modifications if needed, and click **Save**. Duplication is a convenient way of creating a similar task. You can change the information in the duplicate record to create a new task.

- To import tasks, select Import Tasks from the Actions drop-down list of the Tasks tab. For more information on importing data, see Importing Data.

- To delete the task, click **Delete** on the tasks's Detail View page.

Notes

Overview

The Notes Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the this module to create, view, and import Notes and attachments to records in Sugar.

Notes actions

The Actions drop-down list on the Notes tab displays the following options:
Create Note or Attachment. Click this option to create a note or an attachment for a call, a meeting, or a task as described in Creating Notes and Attachments.
View Notes. Click this option to create or view notes as described in Creating Notes and Attachments.
Import Notes. Click this option to import external data into a note as described in Importing Data.

Creating Notes and Attachments

You can create and view notes from the Notes module or from the History sub-panel of a record's Detail View. Notes enable you to add comments on a subject and maintain a record of discussions pertaining to a call, meeting, or task. You can also attach supporting documents to a note.

To create a note or add attachments

1. Select the **Create Note or Add Attachments** from the Actions drop-down list of the Notes module or click the Create icon on any page in the Notes module. Alternatively, click the Create Note or Attachment icon in the Shortcuts Bar.

2. Enter information for the following fields in the Create (Notes) page:

Contact. Enter the name of the contact. Click **Select** to choose one from the Contacts list or to search for a contact in the list.
Related To. Select the related record from the drop-down list or click the Select icon to search for one. When you type a character in a field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results. When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting

with “A”. Similarly, if the Name display format specifies “s l f”, then the system displays last names starting with “A”.
Subject. Enter the subject of the note. This is a mandatory field, as indicated by the red asterisk.
Attachment. Click **Browse** to attach a document that located on your machine, navigate to the location of the file, and select the file.
Note. Enter the text of the note in this box.
Assigned to. Enter the text of the note in this box.
Teams. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click Select to choose new teams from the Teams List, or click Add to add additional team fields and enter the team names. For more information on assigning teams, see Assigning Records to Users and Teams.

3. To assign the note to a user, scroll down to the Other section, and click the arrow button to select a user from the Users list.

4. To assign the note to a team, scroll down to the Other section, and click the arrow button to select a team from the Teams list.

5. Click **Save** to create the note or attachment; click **Cancel** to return to the Notes home page without saving your changes.

Manage Notes

- To edit or delete multiple notes,use the Mass Update panel in the Actions drop-down list of the Notes List View as described in Editing and Deleting Multiple Records.
- To view the details of a note, click its Subject on the Notes List View.
- To edit the information, navigate to the Detail View of the Note, click **Edit**, revise the information, and click **Save**.
- To duplicate the information, click **Duplicate** in the note’s Detail View page.Duplication is a convenient way of creating a similar note. You can change the information in the duplicate record to create a new note.
- To import notes, select Import Notes from the Actions drop-down list of the Notes tab. For more information on importing data, see Importing Data.
- To delete the note, click **Delete** on the note’s Detail View page.

Targets

Overview

Use the Targets Module to track and manage targets as part of mass marketing campaigns. You can create many types of campaigns as described in Creating a Campaign.

Targets for Campaigns

A mass marketing campaign targets a large group of individuals or organizations. Therefore, the campaign process begins with identifying the targets. You can group multiple targets into a target list according to a set of predetermined criteria such as age group or spending habits.
You can associate a record with an existing campaign from Contacts, Leads, and Opportunities.

Creating and importing Targets

A target is an individual that you have some information on, but is not qualified as a lead or contact. Targets are stand-alone records that are not attached to contacts, leads, or opportunities. For more information on Target Lists, see Target Lists Module
Typically, you would create or import a target list, associate it with targets, and then associate it with a campaign. However, you can also create the campaign first and then associate it with a target list.
The general process is as follows:

Targets → Target List → Campaign

To create a target

1. Select **Create Target** from the Actions drop-down list on the Targets tab.

Or, click the Create link in any Targets page.

Note: Targets are stand-alone records that are not attached to Contacts or Leads. If you plan to send emails to existing Contacts or Leads, you can skip the step below.

2. Enter information for the following fields in the Create (Targets) page:

Target Overview
First Name. Enter the target’s first name
Last Name. Enter the target’s last name
Title. Enter the designation of the target
Department. Enter the name of the department to which the target belongs
Account Name. Enter the name of the account related to the target

Office Phone. Enter the target's work number
Mobile. Enter the target's mobile phone number
Fax. Enter the target's fax number
Address Information. Enter the address information in the Primary Address section and select the Copy address from left checkbox to copy it to the Alternate Address section.
Email address. Enter one or more emails addresses for the contact and select Primary. If an email address is incorrect, select Invalid to indicate it. If you sent out campaign emails this contact and the individual chose to opt-out of receiving them, select Opted Out.
To add an additional email address, click Add Address. You can add multiple email addresses.
Description. Enter a brief description of the target

More Information

Do Not Call. Select this box to add the target's name to the Do Not Call list.

Other

Assigned to. Select the user who has ownership of the account related to the target.
Team. Select the team that is allowed to view the account related to the target. To change the primary team assignment, enter the name of the new primary team.
To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.
Assigned to. Select the user who has ownership of the account related to the target.

3. Click Save.

This displays the target's Detail View page. You can now add the target to an existing target list. For more information, see .The target's detail page displays the Campaign Log sub-panel which lists all the campaigns that were sent to the target.

Target Lists

Overview

Use the Target Lists Module to track and manage mass marketing campaigns. You can create many types of campaigns as described in Creating a Campaign.

Creating Target Lists

You can use one of the following methods to add targets to a target list:

- Import records from a file (.csv or .tsv). For information on importing targets, see Importing Data.
- Select records from the List View of Accounts, Contacts, Leads, and Targets.

A target list can specify either individuals who need to be included in a campaign or excluded from a campaign. You can create one of the following types of target lists:
Default. A list of people who are campaign targets and receive the campaign email.
Seed. A list of people who need to receive the campaign email but must not be tracked as potential leads. Typically, these are individuals who must approve the campaign before it is launched.
Test. A list of people who receive the campaign email to test how different email clients display the campaign message before you send it out to the default list.
Suppression List. A list of people you want excluded from the campaign email recipient list. Typically, these are people who chose to opt out of receiving your campaign message. Suppression lists can be by ID, email address, or domain.

Note: Test and seed lists are ignored in email tracking statistics.

If you have multiple targets with the same email address, Sugar will send the campaign email to only one of the targets, chosen at random. The other email addresses, considered to be duplicates, are suppressed even though they are not on the opt-out list.
For non-email campaigns, if you have purchased a license for the Sugar Plug-in for Microsoft Word, you can create a form letter in Word for your targets and merge it with names and addresses of your targets in Sugar to create a customized campaign letter for each target. For more information on the plug-in, see Sugar Plug-in for Microsoft Word. For more information on performing a mail merge, see Performing a Mail Merge.
To create a target list

1. Select **Create Target Lists** from the Actions drop-down list on the Target Lists tab**,** or click the **Create** link in any **Target Lists** page**.** Alternatively, you can create or select an existing target list from a Campaign's Detail View.

2. Enter the following information in the Create (Target Lists) page:

Name. Enter a name for the target list.
Type. Select the target list type such as Default or Seed from this drop-down list.
User. Enter the name of the individual you want to assign to the record or click Select to choose from the User List. By default, this record is assigned to you.
Description. Enter a brief description of the target list
Teams. To change the primary team assignment from your default team to a different team, enter the name of the new primary team.
To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

3. Click **Save**.

You can now add records to the target list from the List View of Accounts, Contacts, Leads, and Targets.

Campaigns

Overview

Use the Campaigns Module to track and manage mass marketing campaigns. You can create many types of campaigns as described in Creating a Campaign.

Creating a Campaign

You can create a campaign using the Campaign Classic option or the Campaign Wizard option. When you use the Campaign Classic option, you are creating a campaign record but you are not completing related tasks such as specifying the email settings. For more information on creating a campaign using the Classic option, see Creating a Campaign.
When you use the Campaign Wizard, it guides you through the process of creating the campaign as well as completing related tasks. For more information on creating a campaign with the Campaign Wizard, see Using the Campaign Wizard.
The Campaigns module provides an embedded Return on Investment (ROI) form that you can use to gauge the success of an executed campaign. For more information, see Viewing a Campaign's Return on Investment.

Types of Campaigns

You can create the many types of marketing campaigns such as Email, Newsletter, Mail, Web, Radio, Television, Print, and Telesales.
When you create a campaign such as Mail and Radio, you are creating a record in Sugar for your reference. However, you cannot execute the campaign through Sugar.

When you create an email campaign or a newsletter campaign, you can execute it through Sugar. An email campaign is a one-time email containing information that is of interest to your targets. A newsletter campaign is an email campaign containing a newsletter sent to your targets at periodic intervals. For example, a newsletter can contain information on product updates. You can send out a newsletter on a weekly, monthly, quarterly, or yearly basis. To measure the campaign's success, you can view statistics such as the number of targets that responded, the number of opportunities that were created, and the generated revenue.
After you launch an email or newsletter campaign, you can view its status to determine its success. For example, you can view how many targets viewed the campaign email, how many clicked any links that were included in the email, and how many leads and contacts were created from the campaign. For more information, see Managing Campaigns.
To capture leads from an email or a newsletter campaign, you can create a Web-to-Lead form. For more information, see Creating Web-to-Lead Forms.
For email campaigns, you can embed images to your email templates instead of sending them as attachments to prevent the email from being reported as spam. For more information on attaching images, see Creating Email Templates.
A campaign diagnostic tool is provided to help ensure that all pending administrative tasks, such as setting up a bounce-handling inbox, have been completed. For more information, see Using the Campaign Wizard.

Note: You must be an administrator to use the Email Setup option that displays on the module tab Actions drop-down list.

To create a campaign

1. Select **Create Campaign (Classic)** from the Actions drop-down list on the Campaigns tab.

2. Enter information for the following fields:

Name. Enter the campaign name.
Assigned to. Enter the name of the user assigned to the campaign; to choose a user from the Users list, click **Select**, and click the user name.
Team. Enter the name of the team that is allowed to view the campaign information; To change the primary team assignment, enter the name of the new primary team.
To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add more fields and enter in the team names. For more information on teams, see Assigning Records to Users and Teams.
Status. Select the current status of the campaign from the drop-down list.
Start Date. Click the Calendar icon and select the date on which the campaign begins.
End Date. Click the Calendar icon and select the date on which the campaign ends.

Note: The Start Date, End Date, and Status values are for your records only. These values do not impact the execution of an email marketing campaign.

Type. From the drop-down list, select the campaign type such as email or trade show. For more information on email campaigns, see Executing an Email Campaign.
Currency. From the drop-down list, select the currency used to calculate the budget, cost, and revenue.
Impressions. Enter the number of page impressions generated from the campaign. You will need to fill in this field after the campaign has commenced.
Budget. Enter the budget for the campaign.

Actual Cost. Enter the actual cost incurred to conduct the campaign.
Expected Revenue. Enter the estimated revenue from the campaign.
Expected Cost. Enter the estimated cost of the campaign.
Objective. Explain the goal of the campaign.
Description. Enter a brief description of the campaign.

3. Click **Save** to save the campaign; click **Cancel** to return to the Campaigns home page without creating the campaign.

Sugar displays the campaign's Detail View on the screen. This page contains sub-panels for targets, tracker URLs, and email marketing to create and view relevant information.

Executing an Email Campaign

Both the administrator and the user must perform a set of tasks to send an email campaign.
The administrator must complete the following tasks:

- Set up outbound emails to enable you to send out email campaigns, and specify the number of campaign emails in each batch.
- Specify a bounce-handling inbox to route campaign emails that bounce back to you. Bounced emails contain specific identifiers that set them apart from emails that are responses from your targets.
- Set up Scheduler jobs to process nightly mass email campaigns and bounced campaign emails.

The user must complete the following tasks:

1. Create an email campaign as described in To create a campaign. Alternatively, you can use the Campaign Wizard to create the campaign as described in Using the Campaign Wizard. The Campaign wizard will guide you through the steps listed below.
2. Specify the targets as described in Creating and importing Targets. You can import targets, create a new target list, or merge with existing target list. You can also select individuals from lead report and contact reports.
3. Create an email template containing the message you want to convey to your targets. For more information, see Creating Email Templates.
4. Set up tracker URLs to track response to your campaign. For more information, see Creating Tracker Redirect URLs.

For more information on creating a mailbox, see Email Settings.

5. Create an email marketing record that specifies information such as the target list, the email template, the campaign start date, and the bounce-handling inbox. For more information, see Creating Email Marketing Records.

6. Optionally, specify one or more Tracker Redirect URLs to track campaign activities. For more information, see To create a tracker redirect URL.

7. Optionally, run the diagnostic tool to ensure that the email campaign will be successfully executed. For more information, see To run diagnostics.

8. Send a test email to your test list to ensure the operation is successful. For more information on test lists, see Creating and importing Targets.

9. Clear statistics from the test email.

10. Request the administrator to schedule a job to send out the campaign emails.

11. Queue the email for the campaign launch.

12. Optionally, convert the campaign targets into leads or contacts.

You can associate a Web-to-Lead form with the campaign. For more information, see Creating Web-to-Lead Forms.
After you launch an email campaign, you can view the campaign status for information on the campaign results. For more information, see Viewing Campaign Status.

Note: The start date, start time, and status specified on the email marketing page determine when the email is sent.

Creating Email Marketing Records

When you create an email campaign, you must also create an email marketing record that contains information on when and how the newsletter should be distributed. This includes the campaign target list, the email template, and the inbox to route bounced emails. The specified start date and time must pass before the campaign is queued for delivery. Emails that bounce back are sent to the From address defined in this record.
To create an email marketing record

1. In the campaign’s Detail View, scroll down to the Email Marketing sub-panel and click **Create**.

2. On the Email Marketing page, enter information for the following fields:

Name. Enter a name for the record.
Status. From the drop-down list, select Active if the record is in use; only active records are queued for the campaign launch. Select Inactive if the record is not in use.
Use Mailbox. From the drop-down list, select a mailbox that is set up for Bounce Handling.
From Name. Enter the name of the organization or person that is sending out the email.
Start Date & Time. Click the Calendar icon and select a date to send out the email. Enter the time in the adjoining field.

Note: To queue the email for campaign launch, select a date and time that have not already passed. Do this after you ensure that the test email was successful.

Email Template. From the drop-down list, select an existing email template; to edit a template or create a new one, click the adjoining **Create** or **Edit** link respectively.
You will need to edit the template to add the Tracker URLs described below into Text and HTML formats.
Send This Message to. Select one or more target lists from the box below; to send it to all the target lists in the box, select the All Target Lists in the Campaign box.

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

Creating Tracker Redirect URLs

A campaign email can contain not only the campaign message but also images and links. Links can direct targets to other URLs such as an external website or a .php file on your system.
You can create an Opt-out tracker URL to embed a "Unsubscribe" link that enables targets to unsubscribe themselves from your campaign mailing list. When targets click on the Opt-out link, the system logs the action for your records.
You can use one or more tracker URLs in your campaign emails to track the response to your campaign. The system generates a unique key for each URL and recipient and associates it with the email template. When recipients open the email and click on a URL link, the system uses the unique key identifier to track their action.
The Status page displays a Recipient Activity bar chart listing actions, such as Viewed Message and Opted Out. You can drill down the chart to view the list of recipients who performed a specific action. For more information, see Viewing Campaign Status.

Note: Before you create a campaign email, check with your system administrator to ensure that the outbound email process is configured to send emails from your system.

To create a tracker redirect URL

1. On the Campaign's detail page, scroll down to the Tracker URLs sub-panel, and click **Create**.

2. On the Campaign Trackers page, enter information for the following fields:

Tracker Name. Enter a tracker name for your reference; use alpha-numeric characters.
Tracker URL. Enter the tracker URL; for example, http://www.sugarcrm.com.
Opt-out Link? Select this box to embed your Unsubscribe instructions in a tracker URL. By default, the system uses the removeme.php file which contains these instructions, and displays this file name in the Tracker URL field.

3. To create the campaign tracker, click **Save**; click **Cancel** to exit the page without saving your changes.

Sugar generates the tracker URL and displays it as "URL for Campaign Message".

You can now insert this tracker URL into an email template of your choice. To create an email template containing tracker URLs, access the Email Template Editor from within an Email Marketing record. For more information on email templates, see Creating Email Templates.

Using the Campaign Wizard

You can use the Campaign Wizard to guide you through the process of creating a campaign.
To create a campaign using the Campaign Wizard

1. Select Create Campaign (Wizard)From the Actions drop-down list on the Campaigns tab.

This displays the Campaign wizard.

2. Select the type of campaign you want to create and click Start.

3. Enter information for the following fields:

¢ Name. Enter the campaign name.

¢ Status. From the drop-down list, select the current state of the campaign.

¢ Assigned to. Enter the name of the user who is assigned to the campaign. To select from the Users list, click Select. By default, it is assigned to you.

¢ Team. Enter the name of the team that is assigned to the campaign. By default, it is assigned to you. To change the primary team assignment, enter the name of the new primary team.

To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

¢ Type. If you are creating a non-email campaign, select the campaign type from the drop-down list.

¢ Frequency. This field displays only for newsletter campaigns. From the drop-down list, select the intervals at which the newsletter will be emailed to targets.

¢ Start Date. Enter the campaign start date; click the Calendar icon to select the date.

¢ End Date. Enter the campaign end date; click the Calendar icon to select the date.

¢ Description. Optionally, enter a brief description of the campaign.

4. Click Next to enter the campaign budget information.

5. Enter information for the following fields:

    ¢ Budget. Enter a numerical value for the campaign budget.

    ¢ Actual Cost. Enter the actual cost of the campaign.

    ¢ Impressions. The number of times the campaign advertisement is viewed on the web.

    ¢ Expected Cost. Enter the expected cost of the campaign.

    ¢ Expected Revenue. Enter the estimated revenue from the campaign.

    ¢ Currency. From the drop-down list, select the currency used for the campaign.

6. Click Next to enter the tracker URL information.

7. Enter information for the following fields:

Tracker Name. Enter a tracker name.
Opt-out link? Select this box to create an opt-out tracker that allows targets to unsubscribe from your email campaigns.
If a target chooses to opt out of an email campaign, the system suppresses the target's information to ensure that they never receive any of your email campaigns or newsletter campaigns. The system also automatically selects the Email Opt Out option on the target's detail page.
However, if a target chooses to unsubscribe from a newsletter campaign, the system suppresses the target information only for that specific campaign. You can still include it in target lists for other newsletter campaigns and email campaigns.
Tracker URL. Enter the tracker URL. For more information, see Creating Tracker Redirect URLs.

8. Click Create Tracker.

Sugar displays the new tracker.
To create additional tracker URLs, click Create Tracker again and enter the new tracker information.

9. Click Next.

If you are creating an email campaign or a non-email campaign, Sugar displays the Target Lists on the screen.
For a newsletter campaign, the Subscription Information page displays on the page.

    a. To use an existing target list, click Select and use the Search panel to find the list.

b. To create a new target list, enter its name in the Target List Name field and select the type from the adjoining Target List Type field.

Sugar displays the target list name below.

10. For newsletters, you must create the following three subscription lists:

- Subscription list: These targets receive the newsletter regularly.
- Unsubscription list: These targets are those who have chosen to opt-out of your mailing list.
- Test list: These targets are the recipients of the test email that you send out to ensure it is successful.

a. To create a custom list, select Allow Select and click Select to search for targets and create the list.

b. For a system-generated list, select Auto-Create and the system displays the name of the list in the field above the Select button.

11. To save the campaign information and begin the process of specifying other details such as the email settings, click Save and Continue. If you plan to specify the email settings later, click Finish.

When you click Save and Continue, the Marketing Email page displays on the screen. For more information, see Creating Email Marketing Records.
After clicking Finish, the campaign's Detail View displays on the screen.
You can edit the information and create an email marketing record from this page.

Running Campaign Diagnostics

Executing an email campaign or a newsletter campaign involves several steps, some of which can be performed only by your administrator. The campaign diagnostic tool enables you to check if all pending administrative tasks have been completed before you attempt to launch the campaign.
To run diagnostics

1. From the Campaigns tab, select Diagnostics.

Sugar displays the Campaign Diagnostics page on the screen.
If the email settings and a bounce-handling inbox have not been configured, warning messages display on this page. Contact your administrator to complete these tasks.

2. To perform the diagnostics again, click Re-Check.

Testing Campaigns

Before you launch an email or newsletter campaign, it is recommended that you test it to check how different email clients display the campaign message.

To test a campaign click **Send Test** and on the Campaign's detail page, select the message, and click **Send**. Ensure that you are sending out the campaign to the Test target list.

Note that in test mode, the system disables your suppression lists. Therefore, the campaign message is sent to targets on your suppression lists. The system also disables checks for duplicate email addresses, thereby allowing users to send a message multiple times.

Managing Campaigns

Managing campaigns includes tasks such as sorting, editing, and duplicating campaign information.

- To sort the list view, on the Campaigns Home page, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To update information for some or all campaigns, on the Campaigns home page, use the Mass Update panel as described in To edit or delete multiple records.
- To view the campaign's details, click the campaign name on the list. From the detail page, you can create Tracker URLs and Email Marketing Records for email campaigns. For more information on email campaigns, see Executing an Email Campaign.
- To edit the campaign information, on the detail page, click **Edit**.
- To duplicate the campaign information, on the detail page, click **Duplicate**. Duplication is a convenient way of creating a similar campaign. You can change the information in the duplicate record to create a new campaign.
- To perform a mail merge, on the detail page, click Mail Merge. For more information, see Performing a Mail Merge.
- After you launch non-email campaign such as a Telesales or a Mail campaign, you will need to mark the campaign manually as "sent". To do this, click Mark as Sent on the campaign's detail page. When you click this button, the Campaigns sub-panel on a targets' detail page indicates the Activity Type as Message Sent to indicate that the campaign material was sent to that individual.
- To delete a campaign, on the detail page, click the **Delete**.
- To send an email campaign to the test group before the formal launch, click Send Test.

- To queue email campaigns for the launch, click **Send Emails**.
- To send out the campaign message to the target audience, click **Send**, and on the Campaign Send page, select the message and click **Send**.
- To view the campaign status, see Viewing Campaign Status
- To track changes to a campaign over time, in the Detail View, click the **View Change Log** link.
- To export information on one or more campaigns, select them in the Campaigns List View page, click the Export option in the Actions drop-down list, and export them as described in To export data from Sugar.
- To view or manage related records in a sub-panel, see To manage related information in sub-panels.

Viewing Campaign Status

After you launch a campaign, you can view its results on the Campaign Status page to determine its success. A campaign's status displays data such as the number of messages sent and the number of messages that bounced back; how many targets viewed the campaign message, the number of lead and contact records that were created, and so on. This enables you to evaluate the effectiveness of the campaign for further action. For example, you can add targets that opted out of the campaign to the Unsubscription target list to ensure that they are not recipients of campaign emails in the future.
The sub-panels in the Detail View display the following information:

- A chart depicting the responses from campaign targets. This includes how many targets viewed the message, how many open any links that were included in the campaign email, and how many opted out of the campaign
- A list of any campaign emails that are still in the queue.
- A list of processed campaign emails.
- A list of targets who viewed the campaign email.
- A list of targets who viewed any links that were included in the campaign email.
- A list of leads resulting from the campaign. Leads are created when targets identify the campaign and, as a result, are converted into leads.
- A list of contact records that were created as a result of the campaign. These contacts are created when leads identify the campaign and, as a result, are converted into contacts.

- A list of campaign emails that bounced back because of invalid email addresses. This information is tracked only if your administrator has scheduled a job to track bounced emails.
- A list of campaign emails that bounced back for other reasons.
- A list of targets that opted out of the campaign.
- A list of email addresses that were added to the Suppression list. These include those that you added to the list, those that were marked as “Opt Out”, and email addresses that were invalid.
- A list of opportunities that were generated from the campaign.

To view a campaign’s statistics, click **View Status** on the Campaign detail page.
The system displays the campaign’s status information such as the targets’ response, number of leads created, and so on.
Viewing a Campaign’s Return on Investment
For any campaign that you execute, Sugar provides an embedded ROI report based on the “Closed/Won” opportunities generated from the campaign. You can view this report from the campaign’s detail page.
To view a campaign ROI report

1. Navigate to the campaign’s Detail View.
2. Click the View ROI option that is located next to the View Status option.

Sugar displays the ROI chart on the screen. This chart displays the actual revenue versus the expected revenue generated from the campaign, as well as the actual cost of running the campaign versus the budget allocated for the campaign.

Creating Web-to-Lead Forms

You can create a Web-to-Lead form to capture leads from web-based campaigns or other web-based sources such as your website. When campaign targets submit the form, it is saved as lead information in the Sugar database. You can use this lead information to generate more opportunities for your organization.
When you generate a Web-to-Lead form, it is saved to the cache/generated_forms folder, from where you can copy it to other locations. You can view and edit generated forms in the TinyMCE editor. Only administrators can add additional fields to the form.
To create a lead form

1. Select Create Lead Form from the Actions on the Campaigns tab.

This displays the Lead Form Wizard page.

2. Click and drag the desired fields from the Available Fields list to the Leads Form (First Column) or the Leads Form (Second Column) list.

To move all the fields, click Add All Fields.

3. Click Next.

4. Enter information for the following fields:

Form Header. The default header displays. You can delete it and enter the desired header information.
Form Description. Enter a brief description of the form.
Submit Button Label. The default label displays on the page. You can delete it and enter the desired label.
Post URL. The default location where the lead information will be stored displays on the page. To edit this information, select the Edit post URL? box and then enter the new location.
Redirect URL. Enter the URL to the page that you would like your leads to view after submitting their information. If you do not specify a URL, Sugar will display a "Thank you for your Submission" message.
Related Campaign. Enter the name of the campaign that is related to this lead form. To select from the Campaigns list, click Select.
Assigned to. Enter the name of the individual you want to assign to the record or click Select to choose from the User List. By default, this record is assigned to you.
Team. Enter the name of the team that is allowed access to the leads generated from this form. To change the primary team assignment, enter the name of the new primary team.
To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see [Assigning Records to Users and Teams].
Form footer. Enter the form footer, if needed.

5. Click Generate Form.

This displays the form in the TinyMCE editor. Modify the form if needed and click Save Web To Lead Form.

6. To save the form, you can do one of the following:

- Copy and paste the HTML from the box to a text file on your local machine.

For On-Premise Sugar systems, the system saves it in the cache/generated_forms folder on the Sugar server. You can copy it from the cache to a different location.

- To save the generated form as a .htm file on your local machine, you can right-click Web to Lead Form, open the page in a new tab, select Save Page As from the browser's File menu and navigate to the location where you want to save it.

7. To view the form, click the Web To Lead Form link at the top of the page.

Performing a Mail Merge

You can create a form letter template for campaigns using the Sugar Plug-in for Microsoft Word and merge it with your target list to create personalized letters for each target. Typically, you perform a mail merge for non-email campaigns.

Note: You must purchase a license for Sugar Plug-in for Microsoft Word.

The process of performing a mail merge is as follows:

1. Ensure that your Administrator has enabled the Mail Merge option for your organization.
2. Ensure that you have enabled the Mail Merge option on your User Preferences page.
3. Define a template in Sugar Plug-in for Microsoft Word and upload it to Sugar.
4. In the Campaigns module, create a non-email campaign.
5. Create your target list and populate it with names and addresses from your list of contacts, leads, and targets. To notify your manager or other users, you can also add those individuals from the Users list.
6. Perform a mail merge to merge the target addresses with the campaign letter to create personalized letters.

To perform a mail merge

1. Click Mail Merge in the Campaign's Detail View page.

This displays the Step 1: Selected Module and Template page. The Campaigns module is auto-selected in the Selected Module drop-down list.

2. Select the mail merge template from the Select Template drop-down list and click Next.

Step 2 of the Mail Merge process displays on the page. The targets specified in your targets list display in the Available list.

3. Select the targets in the Available list and using the right arrow, move them to the Selected list.
4. Click Next.

The final step of the Mail Merge process displays your selections for review. If you need to go back to the previous step to modify the target list, click Back.

5. Click Begin Merge.
6. Ensure that Open with Word is selected and click OK.

The merged document displays on the page.
The system creates a log entry for each target for your records. You can view these entries when you click the View Status option on the campaign's detail page. If you perform mail merge operations repeatedly for these campaign targets, the system updates these log entries.

Cases

Overview

Use the Cases module to track and manage products- orservices-releated problems reported by your users and customers.
After you create a case, you can associate it with related bugs.Sugar provides several pre-defined Case reports for your use. You can edit these reports to suit your needs. For more information on running reports, see Reports Module.

Creating Cases

You can create cases in Sugar and you can also import them into Sugar as a comma-delimited, tab-delimited, or custom delimited file. To import cases, select Import Cases from the Cases tabActionsdrop-down list. For more information on importing data, see Importing Data.
To create a case
Follow the steps listed below to create a case:

1. Select **Create Case**from the Actions drop-down list on the **Cases** tab

or, Click the Create icon on any page within the **Cases** module.

1. Enter information in the following fields on the Cases page:

Priority. Specify the urgency of the problem from this drop-down list.
Status. Specify the current status of the problem, such as New or Closed, from this drop-down list.
Type. Select Administration, User, or Product from this drop-down list if you want to categorize the case.
Subject. Brief statement of the problem.
Account Name. Name of associated account or click **Select** to choose the account.
Description. Description of the problem.
Resolution. Results of the investigation into the problem.
Specify the following information in the Other section:
Teams. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.
Assigned to. Name of the individual you want to assign to the record or click Select to choose from the User List. By default, this record is assigned to you.
Case owners receive an email whenever a case is assigned to them if the administrator has enabled email notification.

Note:	Only team members have permission to view the case, so ensure that case owners are members of the appropriate teams.

2. Click Save to save the case; click Cancel to exit the page without saving the case.

This displays the Case Detail View page. Create new bugs for the case or associate it with existing bugs on this page. For more information on creating bugs, see To create a bug. You can also associate the case with new or existing records such as contacts and activities.

Managing Cases

Managing cases includes tasks such as editing, deleting, importing, and exporting records.
To manage cases

- To sort a list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple accounts, select multiple records in the Cases List View and click the Mass Update link in the Actions drop-down list. For more information, see Editing and Deleting Multiple Records.
- To view the details of a case, on the Cases home page, click on the case name in the list. This displays the Detail View page.
- To edit the case details, click **Edit** on the Cases Detail View, update the information, and click Save.
- To view or run a Case report, select **View** Case Reports from the Actions drop-down list in Cases tab and select the report from the Report List. For information on running reports, see Reports Module.
- To import records, select Import **Cases** from the Actions drop-down list on the Cases tab. For more information on importing data, see Importing Data.
- To export information on one or more cases, select them in the Case List sub-panel on the Cases Home (List View) page, click the Export ink in the Actions drop-down list, and export them as described in Exporting Data.
- To merge duplicates, select the records from the Cases List View, click the Merge link from the Actions drop-down list, and follow the process described in Merging Duplicate Records.
- To duplicate a case, click **Duplicate** on the **Cases** Detail View page. Duplication is a convenient way of creating a similar case. You can modify the information in the duplicate record to create a new case.
- To find duplicates, click Find Duplicates on the Detail View page.

- To create an article, click Create Article on the **Cases** Detail View page. Existing articles are listed in the **Articles** sub-panel on the **Cases** Detail View. For more information on creating articles, see Knowledge Base Module.
- To delete a case, click **Delete** on the Detail View page.
- To track changes to the case over time, click View Change Log on the Detail View page.
- To create or edit related records in a sub-panel, see To manage related information in sub-panels.
- To archive a related email, scroll down to the History sub-panel in the Detail View, where related emails are listed, click Archive Email. This displays the Create Archived Emails page. Copy and paste information related to the email into this page and save it for your records.

Knowledge Base

Overview

Use this module to create, publish, and search for articles within Sugar.

Note: This module is hidden by default. The administrator must list this as a Displayed Tab for your access and use.

Creating Articles

Sugar enables you to create articles on any subject such as case resolutions and FAQs (Frequently Asked Questions) for Sugar users as well as Sugar Portal users. You can embed the contents of a file into an article, or attach the file to the article. All articles are stored in the Sugar database.
You can create two types of articles:
Internal: These articles are only available to Sugar users.
External: These articles are available to Sugar users as well as Sugar Portal users.
An article is assigned to one or more teams. Only team members can access and manage the article. If you are the creator of an article, by default you are assigned both as its author and its primary team. You can assign a different primary team and author. You can also assign additional teams to the article. Since only members of the assigned teams can access the article, the author needs to be a member of an assigned team in order to access and manage the article.
You can specify one of the following statuses for an article:

- **Draft**: The article is still undergoing changes.
- **Expired**: The article is outdated.
- **In Review**: The article is being reviewed by the designated approver.
- **Published**: The article has been approved and is available to the assigned teams. External articles that are published can also be viewed in Sugar Portal.

You can publish an article to make it available to users, or you can assign a reviewer to approve and publish it. If you specify an approver, the system sends an email notification of the pending review to that individual. After the approver has reviewed and published the article, the author receives an email notification of the publication.
Users can search or browse for articles. You can specify an expiration date if you want the article to be available only for a certain length of time. Expired articles do not display in search results or in Sugar Portal.
You can also create articles from a case. This is designed for situations, for example, where a user has documented a case resolution. Creating an article from such records enables the user to share the information with other users without copying or duplicating the information.

Tagging Articles

Tags are similar to folders. They enable you to categorize articles according to specific criteria, such as a topic, to locate the ones that you want. When you tag an article, the system creates a link between the tag and the article which resides in the Sugar database. An article can be linked with more than one tag. Similarly, a tag can be linked with multiple articles.
Tags can be root tags or sub-tags. Root tags are standalone tags. Sub-tags are tags that are nested within root tags.
When you browse for an article, the system displays existing tags in a hierarchical manner. When you select a tag, a list of documents residing within that tag display in the right panel. To view all the tags associated with an article, open the article's Detail View.
All tags are visible to all users. When you browse or search through tags, the system displays only those articles that you are authorized to access through your team memberships.
When you create an article, you can create a new tag for it or select an existing one.

Deleting Tags

Only empty tags can be deleted. Only administrators can delete tags because they can view all the articles associated with a tag. Users need the appropriate team memberships to view articles.

To create an article

1. Select Create Article from the Actions drop-down list in the Knowledge Base tab or click the Create link on any page within the Knowledge Base module.

To create an article from a case, click Create Article in the case's Detail View.
This displays the Create (article) page. When you create an article from a case, the system auto-populates article details such as title, subject, and body with information extracted from that record.

2. Input information for the following fields:

Title. Enter the title of the article.
External Article. Select this box to make the article available to Sugar and Sugar Portal users. By default, external articles are assigned to the Global team to ensure that they display in Sugar Portal.
Revision. Enter the article's revision number. Typically, the revision number of a new article is #1.
Status. Select the current status of the article from this drop-down list. To make the article available for viewing, the status must be set to Published.
Teams. Select the name of the new primary team from this drop-down list to change the primary team assignment.

To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see [Assigning Records to Users and Teams].
Author. You are the assigned author by default. You can also click Select and choose a different user from the Users list.
An author who is not a team member will not be able to access the article.
Approver. The administrator is the reviewer by default. You can also click Select and choose a different reviewer from the Users list.
Expiration Date. You can enter an expiration date for the article. This is optional. The article will not display in search results after the expiration date. External articles will not display in Sugar Portal after the expiration date.
Tags. Click the Tags Select button to link the article with a new or existing tag.
This displays the Tags window. Click a tag to link it with the article. The article is now linked to the selected tag, which displays below the Select (Tags)button in the Article's Edit View.
To delink the article from the tab, click the Delete icon next to the tag name.
For information on creating a tag, see To create a tag or to search for a tag.

3. Enter the text of the article in the Body field. To use the HTML editor, click the HTML link in the toolbar.
4. To attach a file to the article, enter the path to the file in the Attachments field or click Browse to navigate to the location of the file and select it.
5. To embed an image, enter the path to the file in the Embedded Images field or click Browse to navigate to the location of the file and select it.
6. Click Save to save the article; click Cancel to exit the page without creating the article.

This displays the article's Detail View.

To create a tag or to search for a tag

1. Click the Tags'Selectbutton in the article's Edit View.

This displays the Tags dialog box. A list of existing root tags displays under Tags. A root tag can contain one or more sub-tags.

2. To search for an existing tag, enter its name in the Search field and click Search.
3. To create a new tag, click Create New Tag.

The system prompts you to select a parent tag.

4. To create a root tag, select the Tags. To create a sub-tag, select a root tag or a sub-tag.

A text field displays above.

5. Enter a name for the new tag.

6. Click Save to create the tag; click Cancel to exit the window without creating the tag.

New root tags are listed under Tags. New sub-tags are nested within the parent tag.

To manage articles

- To edit an article, on the article’s detail page click Edit, make the changes, and click Save.
- To duplicate an article, on the article’s detail page click Duplicate. You can then edit the duplicate copy as needed and save it as a different article.
- To delete an article, on the article’s detail page click Delete.
- To email an article to a contact, on the article’s detail page, click Send Email, select the contact, and click Send.

Searching for Articles

Browse through tagged articles, or can use filters such as keywords, tags, and title to search for articles. Since each article is assigned to at least one team, the search results list articles that you are allowed to access based on your team membership.
When you specify a keyword, the system performs a full text search of the article’s contents for the keyword. You can use keywords to include or exclude articles in the search results.
Click the Syntax Help link for guidance on syntax.Note that the syntax for full-text search varies depending on the type of database. See below for a list of guidelines on basic search rules:

- Search for keywords and phrases enabled. Keywords and phrases are not case-sensitive.
- Phrases must be enclosed in double quotes; for example, “the whole nine yards”.
- Use spaces to specify multiple keywords. This is similar to using the OR operator. For example, if you search for brown blue, the search results return articles that contain brown or blue.
- Use the plus (**+**) sign to return articles that have both the words. For example, brown + blue returns only articles that contain both the words.
- Use the plus (**+**) sign before a word to included it in the search, u. For example, to find articles on the impact of global warming on polar bears, you can search for “global warming” +bears or “global warming” +“polar bears”.

- Use the minus (**-**) sign to exclude keywords or phrases. For example, brown blue -yellow. You do not need to use the minus sign if you specify the words in the Excluding these words field in Advanced Search.
- Use wildcard characters **%** or ***** to specify a partial word. For example, to find words that begin with super, you can search for super% or super*.

Note: Words that contain a maximum of three letters are treated as stop words in MySQL, unless they are part of a phrase. Hence, the search results will not display articles containing such words.

To perform a full text search for an article

1. Click View Articles on the Knowledge Base tab.

This displays the Search page.

2. Enter one or more keywords or a phrase in the Search field to find articles that contain the keywords or phrase.
3. Select a criterion from the Search within drop-down list to restrict the search.
4. Click Search.

To perform an advanced search

1. Click View Articles on the Knowledge Base tab.

This displays the Search page.

2. Select the Advanced tab and specify one or more of the following criteria:

Containing these words: Enter one or more keywords or phrases. Use a space to separate keywords from each other. Use quotes to enclose a phrase.
Search within: Select the criterion such as a time period or a tag from this drop-down list.
Excluding these words: Enter one or more keywords or phrases to exclude from the search. Use a space to separate keywords or phrases from each other.

Note: Specify the keyword or phrase that you want to find in the Containing these words field to exclude a keyword or phrase.

Using this Tag: Enter the tag name or click Select to choose the tag from the Tags list.
Title. Enter the article's title.
Viewing Frequency. Select the number of articles that were viewed most frequently or the least frequently from this drop-down list.
Status. Select the article's status such as Draft or Published from this drop-down list.
Team. Enter the name of the team or click Select to choose a team from the Teams list to search for articles assigned to a team.

Note: The search results will not display any articles if you are not a member of the selected team.

Approved By. Enter the person’s name or click Select to choose a user from the Users list to search for articles assigned to a specific approver.
Author. Enter the person’s name or click Select to choose the user from the Users list to search for articles authored by a specific user.
Published. Select from the drop-down list to define the time frame with values like On, Before, After, and so on. Enter the date or click the calendar icon and select it. This searches for articles published on the specified date or time period.
Expires. Select from the drop-down list to define the time frame with values like On, Before, After, and so on. Enter the date or click the calendar icon to select it. This searches for articles that expire on the specified date or time period.
Attachments.Select from this drop-down list to search for articles with or without attachments. You can also search using criteria like Mime Type and Attachment name.
External Article? Select this checkbox to search for external articles.
Save this search as. Enter a name, for example Search1, and click Save to save the specified search criteria for future use.
Previous Saved Searches. Select the name of the saved search from this drop-down list and click Search to search using a Saved Search criterion.

3. Click Search to commence the search for articles that meet the specified criteria.

The search results display a list of articles that match your criteria.
To browse for an article

1. Click View Articles on the Knowledge Base tab.

This displays the Search page.

2. Click the Browse tab on the Search page.

3. Click the + sign to view the articles and sub-tags nested within a tag.

4. Select a tag to view its contents.

This displays all articles within a selected tag in the right panel.

5. To view the contents of an article, place the cursor on the article name.

6. To perform an action such as editing or emailing the article, click the article name.

Bugs

Overview

Use the Bug Tracker module to report, track, and manage product bugs. Bugs are defects or features associated with a particular revision of a product. The administrator populates the drop-down list of product releases. After you create a bug, you can associate it with the related case.

Note: This module is hidden by default. The administrator must display it for your use.

Creating Bugs

You can create a bug in Sugar, or import them into Sugar as a comma-delimited, tab-delimited, or custom delimited file.
To create a bug
Follow the steps listed below to create a bug:

1. Select Report Bug from the Actions drop-down list on the **Bug Tracker** tab.

2. Enter information for the following fields in the Create (Bug)page:

Subject. Enter a brief statement of the problem.
Priority. Specify the urgency of the problem in this drop-down list.
Source. Specify whether the bug was reported by an internal user (internal), external user through email (email), through your organization's website (web), or by an external developer community member on your organization's forum (forum).
Category. Select the product associated with the bug from this drop-down list.
Found in Release. Select product version in which the bug was found from this drop-down list.
Type. Select Defect from this drop-down list if the issue is a problem with the product. Select Feature if the issue is a suggested enhancement for the product.
Status. Specify the current status of the problem such as New or Closed from this drop-down list.
Resolution. Select the resolution to the bug from this drop-down list.
Fixed in Release. Select the product version in which the bug was fixed from this drop-down list.
Description. Description of the problem.
Work Log. Record your actions to resolve the bug.
Specify the following information in the Other section:
Assigned to. Enter the name of the individual you want to assign to the record or click Select to choose from the User List. By default, this record is assigned to you.
Teams. To change the primary team assignment, enter the name of the new primary team. To assign additional teams to the record, click Select to choose new teams from the Teams List, or click Add to add

additional team fields and enter the team names. For more information on assigning teams, see Assigning Records to Users and Teams.

3. Click Save to create the bug; click Cancel to exit the page without creating the bug.

This displays the Detail View page for the bug. Associate the bug with related records such as contacts and projects on this page. You can also create a new case for the bug or associate it with an existing case. For more information on creating cases, see Cases Module.
Sugar provides several pre-defined bug reports that you can edit, if required. For more information on running reports, see Reports Module.

Managing Bugs

Managing bugs includes tasks such as editing, deleting, importing, and exporting records.
To manage bugs

- To sort a List View, click any column title that has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete some or all the bugs, select Mass Update from the Actions drop-down list. For more information, see To edit or delete multiple records.
- To run a pre-defined bug report, select View Bug Reports from the Actions drop-down list in the Bug Tracker tab.
- To import records, click Import Bugs from the Bug Tracker tabActionsdrop-down list. For more information on importing data, see Importing Data.
- To export records, select them from the list, click the Export link from the **Actions** drop-down list and follow the process described in Exporting Data.
- To merge duplicates, click the Merge link from the Actions drop-down list and following the process described in Merging Duplicate Records.
- To view the details of a bug, click the bug in the Subject column on the Bug Tracker home page (List View).
- To edit the bug details, click **Edit** on the Detail View page.
- To duplicate a bug, click **Duplicate** on the Detail View page. Duplication is a convenient way of creating a similar bug. You can change the information in the duplicate record to create a new bug.
- To delete a bug, click **Delete** on the Detail View page.

- To track changes made to the bug over time, click **View Change Log** in the Detail View page.

- To export information on one or more bugs, select them from the List View, click Export from the Actions drop-down list, and export them, following the instructions in To export data from Sugar.

- To create or manage related records in a sub-panel, see To manage related information in sub-panels.

- To archive a related email, scroll down to the History sub-panel in the Detail View where related emails are listed and click Archive Email. This displays the Create Archived Email form. Copy-paste information related to the email into this form to save it for your records.

Projects

Overview

Use the Projects Module to create and manage projects for your organization.

Project Ownership

Every project is assigned to a user and a team. The assigned user is the project manager. By default, this is the user who created the project.The project is assigned to a private team by default, which is typically the user who created the project. The assigned user can assign the project to another userand to multiple teams. For more information on teams, see Assigning Records to Users and Teams
Only members of the assigned team can access and manage the project and associated project tasks. Therefore, the assigned user must be a member of the assigned team in order to access and manage the project.

Note:	By default, this module is hidden. The administrator must display it in order to enable you to use it.

Creating Projects

In the Projects module, you can create, manage, and duplicate projects and project tasks.
You can define multiple project tasks for each project. When you create a project task, you must associate it with a project. You can associate a project with multiple activities, accounts, opportunities, and cases. You can also create projects and project tasks from an email's detail page.

The Projects module enables you to view project tasks in Grid view and Gantt view, export projects to MS Project, and create project templates.
From a project's Gantt view, you can create project tasks and assign team members (resources). Resources can be users or contacts. Users are members of your organization who are responsible for project execution. Contacts are external individuals associated with the project such as customers and vendors. For more information, see To assign project resources.
If your projects often have similar tasks, you can create a project template as a boilerplate for new projects. For more information, see Creating Project Templates.
You can export the project information from Sugar to Microsoft Project. For more information, see Exporting a Project.
You can print project tasks and export them in PDF format to your local machine.
The Projects module also provides the ability to factor in holidays and vacations while planning a project. For more information, see Creating Project Holidays.
The My Projects Dashboard enables you to view a summary of overdue tasks, upcoming tasks, and related cases for yourself and your direct reports. For more information, see Viewing the Projects Dashboard.

To create a project

1. From the Actions list on the Projects tab, select **Create Project**.

The Projects page displays on the screen.

2. On the Projects page, enter information for the following fields:

Name. Enter a name for the project.
Status. From the drop-down list, select the project status such as Draft, In Review, or Published.
Start Date. Click the Calendar icon and select the project start date.
End Date. Click the Calendar icon and select the project end date.
Assigned to. Enter the name of the user who has ownership of the project. By default it is assigned to you.
Team. To change the primary team assignment, enter the name of the new primary team.
To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.
Priority. From the drop-down list, select the importance of the project such as Low, Medium, or High.
Description. Enter a brief description of the project.

3. Click Save to create the project; click Cancel to exit the page without creating the project.

The system saves the project and displays its detail page on the screen. From this page, you can create project tasks, assign users and contacts, project templates, and related records. You can also export the project to MS Project.

To manage projects

- To create project tasks, click View Gantt. Alternatively, click View Gantt in the Project Tasks sub-panel. For more information, see Creating Project Tasks.
- To save the project as a template, click Save as Template.

- The system saves the project as a template and adds it to the Project Templates list. For more information, see Creating Project Templates.
- To export projects, select them from the list, click the Export link and follow the process described in Exporting Data.
- To print the project, click Print at the top right-hand corner of the page.
- To delete the project, click Delete.
- To add resources, see To assign project resources below.
- To create project holiday, see To create a project holiday.
- To create or manage other records such as activities, see To manage related information in sub-panels

To assign project resources

1. Click the project on the Projects Home page to view its details.

The project's detail page displays the Resources sub-panel.

2. To assign one or more users, click Select User and select from the Users list.

The assigned users are now listed in the Resources sub-panel.

3. To assign one or more contacts, click Select Contact and select from the Contacts list.

The assigned contacts are now listed in the Resources sub-panel.
You can remove a resource by clicking the rem icon corresponding to the resource name.

Note: You can manage resources only for projects that are assigned to you.

Creating Project Tasks

Typically, a project consists of multiple tasks that must be completed satisfactorily to ensure success. After you create a project, you can create tasks associated with it. When you create a project, the system assigns it to you. Therefore, only you can create and edit all the project tasks. If you assign a task to another user, then that individual can edit the task.
When you create project tasks, you can specify the dependencies between them. For example, if task 1 needs to be completed before task 2 can begin, you can specify task 1 as the "predecessor" of task 2.
You can view a project in grid view or in Gantt view. You can create project tasks only in Gantt view.
You can edit a task in Edit View and in Grid View. Some of the fields that you can update in Edit View are different from those in Grid View. For example, you can edit custom fields in Edit View but not in Grid

View. You can edit task duration and assigned resources in Grid View but not in Edit View. It is recommended that you create and manage project tasks in Grid View. You can use Edit View to add and manage additional information that is not accessible through the Grid View.

Project Grid View

The grid view displays details such as the task name, completed percentage, duration, project start and end dates, dependencies, and assigned resources. You can view specific information such as only completed tasks or milestones. Project Managers can edit any task and add additional tasks as needed. Users can specify the completed percentage and actual duration for their assigned tasks.
You can right-click anywhere in the grid view to access the same control options.
The system calculates the duration of a task depending the duration of its sub-tasks. You can specify the duration in days or hours. If you specify the duration of a parent task in days and the duration of one or more sub-tasks in hours, the system rounds off the total amount of time taken and displays the duration of the parent task in days. It also automatically updates the Start and Finish dates based on the duration of the parent task.
You can specify task dependencies for main tasks and sub-tasks. For example, if task 1 must be completed before you can begin task 2, you enter the ID of task 1 in the Predecessors column for task 2. This implies the dependency of task 2 on the completion of task 1.
In grid view, you can export the project tasks as a PDF file to your local machine.

Project Gantt View

The Gantt view displays the total time needed for each task from start to finish.
You use the Gantt chart to create project tasks and view completed tasks and milestones by week or by month.

> Note: You cannot print or export the project in Gantt view.

To create a project task

1. On the Projects Home page, click the project in the Project List.

2. In the Project Tasks sub-panel of the project’s detail page, click View Gantt.

Sugar displays the Gantt view with two blanks rows on the screen. Each row represents an individual task. To add a new task, click theInsert Row icon to add a new row and then enter the task details. To add a new row above an existing row, click the task ID to select the row and then click the Insert Row icon.

3. To create a task, enter the following information:

% Complete. Enter a numerical value to indicate what percentage of the task has been completed.
Task Name. Enter a name for the task.
Duration. Enter a numerical value to indicate how long it would take to complete the task. You can specify the duration in days or in hours.
Start. By default, the system enters the current date as the task’s Start date. To change the date, click it and select a different date from the calendar.
Finish. By default, the system enters the current date as the task’s Start date. To change the date, click it and select a different date from the calendar.
Predecessors. If the completion of this task depends on the completion of other tasks, enter the task name in this column.
Resource. From the drop-down list, select the individual who is assigned to the task.

Actual Duration. After the task is completed, enter a numerical value for the actual duration of the task.

4. To create a sub-task, select the task ID to select the row and then click the Indent icon.

The selected task becomes a sub-task of the task above. A plus sign (+) displays next to the parent task. To select sequential rows, hold down the Shift key while selecting the rows. To select non-sequential rows, hold down the Control key while selecting the rows.

5. To change a sub-task to a main task, select the task and click the Outdent icon.

6. To copy and paste a task, select the task and click the Copy icon. Then, click the Paste icon to paste the row.

7. To delete a task, select the task and then click the Delete icon.

8. To expand a parent task to view the sub-tasks, select the task and then click the Expand All icon.

9. To collapse a parent task, select the task and then click the Collapse All icon.

10. If you want a specific view such as overdue tasks or milestones, select the desired view from the View drop-down list.

11. Click the Save icon to create the task.

The task is now listed in the Project Tasks sub-panel on the project's detail page. You can click the task name to view its detail page. The task is also represented in the Gantt view.

12. To export as a PDF file to your local machine, in the grid view click Export to PDF.

You can edit some details, archive emails, view related activities in the Activities sub-panel, and track any task modifications in the History sub-panel from a task's Detail View page.

Note: The project task's Detail View and Edit View display a Task Number field and an Order field. These two fields, which were used in the application prior to 5.0, have been replaced by the Task ID field. If you are not using a task number or order number, you can safely remove these two fields from the Project Task layouts in Studio.

To edit a project task

1. On the Project Tasks sub-panel, click the task that you want to edit.

The task's detail page displays on the screen.

2. Click Edit for the task's Edit View; click Edit Task in Grid for the Grid View. The differences between the two views are described at the beginning of this section.

3. Click Save to update the task information; click Save and Continue to save the changes and edit the next task in the list.

4. To view the modification made to the task, click Change Log.

Creating Project Templates

You can create a project template for projects with similar tasks. When you create a project template, you can define the project tasks. You can then save a copy of the template as a separate project and edit project tasks for each project as needed. Alternatively, you can save an existing project as a template. A template created from an existing project inherits the project tasks. You can edit these tasks if necessary. You can also assign resources based on project requirements.
To create a project template

1. From the Actions list on the Projects tab, select the Create Project Template option.

The Project Template page displays on the screen.

2. Enter information for the following fields:

Name. Enter a name for the template.
Status. From the drop-down list, specify the template's status by selecting Draft, In Review, or Published.
Start Date. Enter a start date for the project; to select from the calendar click the Calendar icon.
End Date. Enter an end date for the project; to select from the calendar click the Calendar icon.
Assigned To. Enter the name of the individual you want to assign to the record or click Select to choose from the User List. By default, this record is assigned to you.
Team. To change the primary team assignment, enter the name of the new primary team.
To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.
Priority. From the drop-down list, specify the project's priority such as High, Medium, or Low.

3. Click Save to save the template; click Cancel to exit the page without saving the template.

After you save the template, it is added to the Project Template list. You can now save it as one or more projects.

4. To view the template, select View Project Templates on the Projects tab.

To manage project templates

- To sort the list view on the Project Templates Home page, click the icon in the Name column; to reverse the sort order, click the icon again.

- To view the details of a template, click its name in the list view.

- To edit the template, click **Edit** on the template's detail page, make the changes, and click Save.

- To duplicate the template, click Duplicate on the template’s detail page.
- To save the template as a project, click Save as Project.
- To delete a template, click **Delete** in the template’s detail page.

Viewing the Projects Dashboard

The My Projects Dashboard displays the current status of assigned projects.
The information that you can view depends on your role in the project. As a Project Manager, you can view overdue tasks, upcoming tasks, and related cases for all projects that you manage. Your assigned projects along with the overdue tasks, upcoming tasks, and related cases for each project are listed in the top panel of the dashboard. The tasks listed under My Project that those that are assigned to other team members. Tasks that are assigned to you are listed in the My Project Tasks panel below.
Team members who do not have direct reports can only see the status of tasks assigned to them.
To view the detail page of a project, click the project name. Similarly, to view a task or case, click its name in the list.

Creating Project Holidays

When you create a project, you may need to take holidays into consideration. A holiday can be one of the following two types:

- A project team member may take time off from the project but may still be working on other projects. If so, the Project Manager can create a project holiday to account for the member’s absence.
- If a project team member is going on vacation, the individual can report it on the User Settings page.

To create a project holiday

1. On the Projects Home page, select the project to view its details.
2. In the Project Holidays sub-panel on project’s detail page, click Create.

The Holiday form displays on the page.

3. Enter information for the following fields:

Holiday Date. Enter the holiday or vacation date; to select a date from the calendar, click the Calendar icon.
Description. Enter a brief description or reason for the holiday.
Resource Name. From the drop-down list, select the user or contact who is taking the holiday.

4. Click Save to save the holiday; click Cancel to exit the form without saving the holiday.

The saved holiday is listed in the Project Holiday’s sub-panel on the project detail page.

Creating Project Resource Reports

From the grid view and the Gantt view, you can create a report that displays a user’s assigned tasks across projects. The report displays all the project tasks along with details such as the project name, the workload percentage per project, duration of each project, and any scheduled holidays. The Resource report not only breaks down a user’s workload across projects but also lists the percentage of busy time for each day. This enables managers to better evaluate the status of ongoing projects.
To create a project resource report

1. In the project’s Detail View, click View Gantt.

The Gantt view displays on the page.

2. Click Resource Report.

The Resource Report form displays on the page.

3. Select the user from the Resource drop-down list.

4. Click in the Tasks that Start or Finish After field and select the date on which a task begins or ends.

5. Click in the And Before field and select the date before which the task would end.

6. Click Report to run the report.

The report displays the daily status, the assigned project tasks, and any scheduled holidays.

Exporting a Project

You can save a Sugar project in MS Project format. You can open the .MPX file in MS Project or save it to your local machine.
To export a project

1. In the project’s Detail View, click Export to MS Project.

The system displays a message asking if you want to open the .MPX file or save it.

2. To open the file in MS Project, select Open with MS Project and click OK. To save it to your local machine, select Save to Disk, and navigate to the location where you want to save it.

Reports

Overview

Use the Reports module to create and manage reports on any module such as Accounts, Contracts, and Opportunities. You can also create reports to track user activity such as viewed modules, modified records, and other activities.

Reporting on Sugar data

The Reports list displays reports in the order that you viewed them, with the most recently viewed report at the top of the list. The date and time when you last viewed the report is displayed in the Accessed On column.
Administrators can view and edit reports regardless of team membership.
You can view charts in PDF format generated while viewing reports in an HTML5 browser.
Sugar provides several pre-defined reports. These are listed on the Reports List View. You can also create custom reports for your requirements. These include reports on forecasts, open cases, accounts, and usage metrics.Sugar also provides tracker reports. For more information see Viewing and Creating Tracker Reports. All existing reports are listed on the Reports Home page. You can click a report name to view its contents.
You can run a report immediately when you create it or you can schedule it at a later date. You can also schedule it to run at specific time intervals. For more information on scheduling, see Scheduling Reports.
You can also create a list of favorite reports that you frequently access. This allows you to group reports that may not share common searchable criteria.

You can view frequently used reports through Sugar Dashlets on your Home page. You can view a report with charts as a chart Dashlet. To view reports without charts through a Dashlet, you will need to add them to your list of favorite reports. For more information on Dashlets, see Managing Sugar Dashlets.
You can search for an existing report using the Search panel on the Reports home page. The search panel allows you to search for reports by criteria such as a specific module, report type, report title, and so on. For more information, see Searching for Information in Sugar.
The Reports module tab displays options to view existing reports for specific modules.

Note: After upgrading to the latest version of Sugar, it is recommended that the administrator use the Repair-Check Reports functionality to ensure that existing reports are still valid after the upgrade.

Report categories

Sugar provides two categories of reports: Standard reports and Advanced reports. Use the Report Wizard (a Sugar query builder) create a standard report. You can create several types of standard reports, as discussed in **Report Types**.
You can write complex SQL queries to create an advanced report. Only administrators can create Advanced Reports.
For information on creating standard reports, see Creating Standard Reports. For information on creating advanced reports, see Creating Advanced Reports.

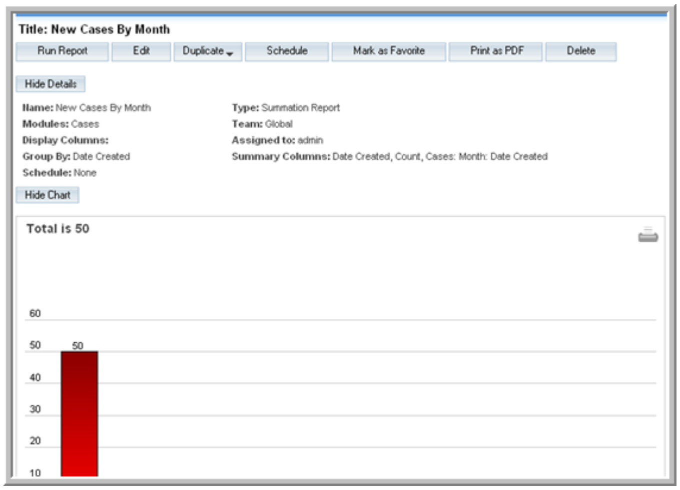
Report types

The following types of reports are available in Sugar:

- Summation
- Summation with Details
- Rows and Columns
- Matrix

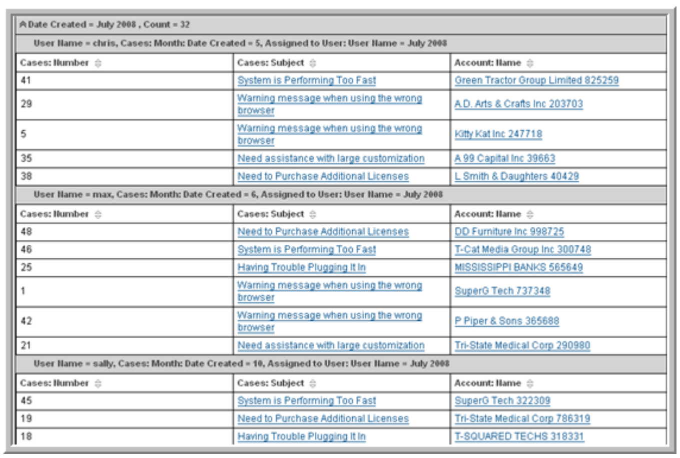
Summation reports

A summation report displays the computed data of records that match the specified criteria.
A summation report can group the summary data by a date range or by field values such as Type, Industry, Lead Source, and Sales Stage and display the total count. You can choose from an additional set of columns which display data values from records within the selected module if the report contains a grouping. These include computed derivatives from numeric-only data values such as SUM, AVG, MAX, MIN, and a weighted average.
Summation reports can be viewed in a chart format and displayed as a Sugar Dashlet on your Home page. You can click any segment of the chart to drill-down and view details such as sales by individual team members.
Example
The following is a pre-defined summation report to view the total number of cases created per month.



Summation Report with Details

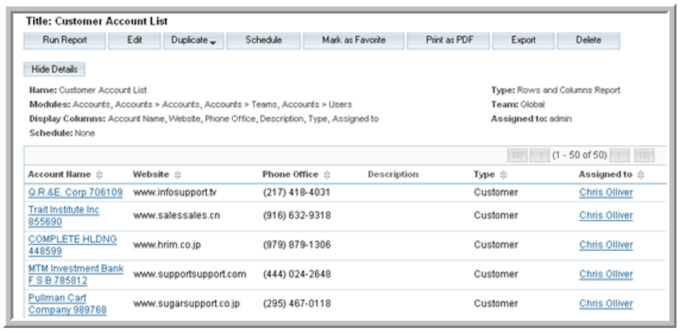
In addition to the total count of records, this report enables you to group data and view more details related to the records in the report. The group-by data is visually represented in the report output. For example, you can group records by the assigned user and sort the results in ascending or descending order.
Example.
The following report lists open cases by month, grouped by assigned user.



Date Created = July 2008 , Count = 32		
User Name = chris, Cases: Month: Date Created = 5, Assigned to User: User Name = July 2008		
Cases: Number	Cases: Subject	Account: Name
41	System is Performing Too Fast	Green Tractor Group Limited 825259
29	Warning message when using the wrong browser	A.D. Arts & Crafts Inc 203703
5	Warning message when using the wrong browser	Kitty Kat Inc 247718
35	Need assistance with large customization	A 99 Capital Inc 39663
38	Need to Purchase Additional Licenses	L Smith & Daughters 40429
User Name = max, Cases: Month: Date Created = 6, Assigned to User: User Name = July 2008		
Cases: Number	Cases: Subject	Account: Name
48	Need to Purchase Additional Licenses	DD Furniture Inc 998725
46	System is Performing Too Fast	T-Cat Media Group Inc 300748
25	Having Trouble Plugging It In	MISSISSIPPI BANKS 565649
1	Warning message when using the wrong browser	SuperG Tech 737348
42	Warning message when using the wrong browser	P Piper & Sons 365688
21	Need assistance with large customization	Tri-State Medical Corp 290980
User Name = sally, Cases: Month: Date Created = 10, Assigned to User: User Name = July 2008		
Cases: Number	Cases: Subject	Account: Name
45	System is Performing Too Fast	SuperG Tech 322309
19	Need to Purchase Additional Licenses	Tri-State Medical Corp 786319
18	Having Trouble Plugging It In	T-SQUARED TECHS 318331

Rows and Columns Reports

A Rows and Column report displays data in rows and columns that reflect the value of selected fields such as Name and Address.
Example.
The following report lists details of customer accounts along with the user assigned to each account.


Title: Customer Account List

Run Report | Edit | Duplicate | Schedule | Mark as Favorite | Print as PDF | Export | Delete

Hide Details

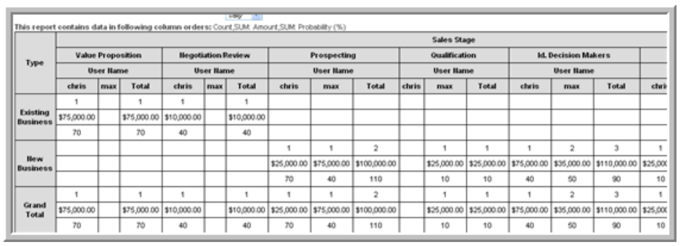
Name: Customer Account List
Modules: Accounts, Accounts > Accounts, Accounts > Teams, Accounts > Users
Display Columns: Account Name, Website, Phone Office, Description, Type, Assigned to
Schedule: None
Type: Rows and Columns Report
Team: Global
Assigned to: admin

(1 - 50 of 50)

Account Name	Website	Phone Office	Description	Type	Assigned to
Q.R.&E. Corp 706109	www.infosupport.tv	(217) 418-4031		Customer	Chris Olliver
Trait Institute Inc 855690	www.salessales.cn	(916) 632-9318		Customer	Chris Olliver
COMPLETE HLDNG 448599	www.hrim.co.jp	(979) 879-1306		Customer	Chris Olliver
MTM Investment Bank F S B 785812	www.supportsupport.com	(444) 024-2648		Customer	Chris Olliver
Pullman Cart Company 989768	www.sugarsupport.co.jp	(295) 467-0118		Customer	Chris Olliver

Matrix Reports

Matrix reports are similar to summation reports but unlike summation reports, a matrix report displays results in a grid format. The report displays totals for all summaries. You can use a maximum of three group-by columns to group the data. You can also choose a layout option to view the report results.
Example
The following report groups opportunities by type, sales stage, and assigned user.


This report contains data in following column orders: Count,SUM: Amount,SUM: Probability (%)

Type	Sales Stage															
	Value Proposition			Negotiation/Review			Prospecting			Qualification			Id. Decision Makers			
	User Name			User Name			User Name			User Name			User Name			
	chris	max	Total	chris	max	Total	chris	max	Total	chris	max	Total	chris	max	Total	chri
Existing Business	1		1	1		1										
	$75,000.00		$75,000.00	$10,000.00		$10,000.00										
	70		70	40		40										
New Business							1	1	2		1	1	1	2	3	1
							$25,000.00	$75,000.00	$100,000.00		$25,000.00	$25,000.00	$75,000.00	$35,000.00	$110,000.00	$25,00
							70	40	110		10	10	40	50	90	10
Grand Total	1		1	1		1	1	1	2		1	1	1	2	3	1
	$75,000.00		$75,000.00	$10,000.00		$10,000.00	$25,000.00	$75,000.00	$100,000.00		$25,000.00	$25,000.00	$75,000.00	$35,000.00	$110,000.00	$25,00
	70		70	40		40	70	40	110		10	10	40	50	90	10

Creating Standard Reports

You create a report in the Report Wizard and run it in the Report Viewer.
Follow the steps below to create a standard report:

1. Select Create Report from the Actions drop-down list in the Reports tab.

This activates the Report Wizard and displays the Report Type page.

2. Select a report type.

3. Select a module.

This displays the Define Filters page.

4. Select one or more fields as filters from the listed related modules.

5. Select the group-by fields that you would like to use to group records for Summation, Summation with Details, and Matrix reports. You can select fields from more than one module. You can use a maximum of three fields to group records in matrix reports.

6. Select a chart type for a Summation, Summation with Details, and Matrix reports (optional).

Select the display columns for Summation with Details and Row and Columns reports.

7. Save the report and run it at a later date, or run it immediately. You can also preview the report before you save it.

Note: Clear the Reports cache to display custom fields in the list of available fields for filters and group-by columns in the Reports Wizard. Log out and log into Sugar to clear the cache.

Enter values at every step of the process listed above to proceed to the next step.

Setting Filters

Filters are fields, operators, and optionally, values (depending on the operator).
Use the Add Filter Group button to create filter groups. Create nested filter groups with a combination of AND and OR operators for complex queries with several filtering levels.
The choices for operators vary, depending on whether you have selected a text field, numeric field, or date field.
Operators for text fields can be Is, Is Not, Equals, Does Not Equal, Contains, Does not Contain, Starts With, Ends With, and, Is Not One Of, Is Empty, andIs Not Empty.
Operators for numeric fields can be any of the following: Equals, Does Not Equal, Less Than, Greater Than, Is Between (requires two numeric values), Is Empty, Is Not Empty.
Operators for date fields can be any of the following: On, Before, After, Is Between (requires two date values), Not On, Is Empty, Is Not Empty, Yesterday, Today, Tomorrow, Last 7 Days, Next 7 Days, Last Month, This Month, Next Month, Last 30 days, Next 30 days, Last Year, This Year, andNext Year.
Use the User Name field to run a report on one or more users. For example, you can run a report on all opportunities assigned to Chris, or to Chris and Will. Similarly, you can use the Team ID.
If the assigned user or a member of your team adds a new filter, the system alerts you of the change when you run the report
A dynamic filter called Current User is available in Sugar. The Current User is any user who is currently logged in and running the report. This filter enables you to create one report for multiple users. For example, you can create one report on all opportunities assigned to Current User. When a member of your team runs this report, the report results automatically reflect the member’s assigned opportunities because the Current User is the person who is logged in and running the report.
You can filter by record and/or by user for reports on activities such as calls, meetings, and tasks. For example, you can run a report on meetings held in the last month regarding a specific case number or for all cases assigned to a specific user.
Sugar saves the report definition when you create and save a report. Only the assigned user or a member of the assigned team has the permission to change the report definition. If the report definition is modified, the system displays an alert when you try to run the report.

Run-time Filters.

A Run-time option enables you to modify report filter values in the Report Viewer when you view the report. The Report Wizard retains the original filter values for the report, regardless of changes you or other users make to the run-time filters while viewing the report. Each user’s run-time filter values are preserved for future use when they view the report again. This enables users to modify certain filters in a shared report without altering the original filter values. Users can click the Reset button to restore the original run-time values.
To create a Summation report

1. Select Create Report from the Actions drop-down list of the Reports tab.

The Report Wizard page displays the various report types. After you select a report type, the Report Wizard guides you through the process of creating the report.

2. Click Summation Report.

This displays a list of modules.

3. Select the module of your choice.

This displays the Define Fields page with a list of Related Modules and Available Fields (in the primary module). You can use one or more fields as filters.

4. Click a field to select it as a filter in the Field Name pane.

The field displays in the right pane.

5. Set all the report filters and select the operator from the drop-down list above.

To set a level one filter, select the module from the Related Modules list and then select the field from the Available Fields drop-down list.
To set a level two filter, click Add Filter Group and then select the field from the Available Fields drop-down list. Ensure that you add the field to the correct filter level.
The tracker bar at the top of the page allows you to navigate back and forth within the Report Wizard and indicates where you are within the Wizard.

6. Select the Run-time box to apply the filter values only at the time of running the report.

7. Click Next to define Group By columns.

8. Select the module from the Related Modules column.

9. Select one or more fields from the Available Fields drop-down list to group-by columns.

You must group by day, month, quarter, or year if you select a date field.

10. Click Next.

This displays the Display Summaries page. To sort data by a column, click the Sort By radio button that is adjacent to the column name.

11. Select Count as one of the columns from the Available Fields drop-down list. The Group By columns selected in the previous step is displayed as selected. Select the corresponding Sort By radio button, and select either Ascending order or Descending order to display a specific summary column first.

12. Click Next to view the chart options.

For more information on creating a chart, see Creating Report Charts.

13. Click Next to view the Report Details page.

14. Enter a name for the report.

15. Select Show Query if you want to display the SQL query when you run the report.

16. Click Select in the Assigned to field to choose the user you want to assign to manage the report.

Enter the name of the new primary team in the Team field to change the primary team assignment.
To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see [Assigning Records to Users and Teams].

17. Select Optional Related Modules to display records from the primary module even when there are no records from the related modules. When this option is not selected, primary module records will display only if the related module records exist.

18. To preview the report results before saving it, click Preview.

19. To navigate back to a specific step in the report building process to view or edit the criteria, click Back.

20. To save the report and run it at a later date, click Save.

To save and run the report immediately, click Save and Run; to exit the page without saving the report, click Cancel.
The report results display on the page when you run the report. To sort the columns in ascending or descending order, click the arrows located next to the column names.
When you specify a chart, it displays above the tabular data. Place the cursor on a segment to view the associated data.
To create a Summation with Details report

1. In the Report Wizard, select Summation with Details.

2. Follow the process outlined in To create a Summation report to define filters, Group By columns, and Display Summary columns.

3. Click Next to choose the Display Columns.

Select the appropriate Order By button to order the report output by the corresponding column. Order the data in ascending order or descending order based on the columns chosen.
The report results are grouped according to the specified display columns and order.

4. Click Next and, optionally, select a chart type.

5. Click Next.

This displays the Report Details page and enter details like the report name and the assigned user name.

6. Click Save to generate the report without running it; click Save & Run to generate the report and run it.

To create a matrix report

1. Click Create Report on the Reports Home page, and select Matrix.
2. Follow the process outlined in To create a Summation report to create the report.

For matrix reports, you can select a maximum of three group-by columns. When you specify three group-by columns, you can select from two layout options to display the results: 1x2 and 2x1. With the 1x2 layout option, the data for the first group-by field displays in a row and the data for the other two group-by fields displays in columns. With the 2x1 layout option, the data for the first two group-by fields display in rows and the data for the third group-by field displays in a column.
If you have only two group-by columns, you can change the layout by dragging and dropping the group-by fields to a different order in the Define Group By page.
To create a Row and Column report

1. Click **Create Report** in the Reports home page.
2. Select Rows and Columns Report.
3. Select the module of your choice.
4. Define filters as described in To create a Summation report.
5. Click Next and select the desired fields from the Related Modules list as the Display Columns as described in To create a Summation with Details report.
6. Click Next to move to the Report Details page and enter details like the report name and assigned user.
7. Click Save to generate the report without running it; click Save & Run to generate the report and run it.

Creating Report Charts
Sugar enables you to view a summation, summation with details, and matrix report as a chart with the legend and details below. You can create a horizontal bar chart, vertical bar chart, line chart, pie chart, and funnel chart.
You must specify at least one Group By column and one Summary column to render a chart.
To create a chart

1. Enter the following information on the Chart Options page of the Report Wizard when creating a summation or a matrix report:

    ¢ **Chart Type**. Select a type from this drop-down list, such as Horizontal or Vertical.

¢ **Data Series**. Select an available grouping function from the drop-down list, such as Count, AVG, MIN, MAX. The values displayed in this drop-down list depend on the selected group-by options and display columns options.

¢ **Description**. Enter a brief description of the chart.

¢ Round Numbers Over 100000. Numbers over 100000 will be rounded in charts. For example, 350000 will be expressed as 350K. By default, this option is enabled. To disable this option, uncheck the box.

2. Click Next to enter a name for the report and generate it.

This chart can be added as a Sugar Dashlet on your Home page. For more information, see To add Sugar Dashlets.

3. To hide the legend, click the down arrow.

4. To view a segment amount as a percentage, place the cursor on it; click to drill down to the data.

Note: Line charts and Pie charts are not available for reports with multiple groupings.

For more information to creating charts, see To create a chart.
Editing and managing Reports
When you save a report, it is added to the list on the Reports Home page. Users can view, run, edit, schedule, and delete reports.

- To edit the report details, click **Edit**; to run the updated report, click Save and Run.
- To schedule a report to run, click Schedule from the Detail View. For more information, see Scheduling Reports.
- To duplicate the report, click Duplicate in the Detail View and follow the steps described in **To duplicate a report**.
- To add one or more reports to your list of frequently viewed reports, click the star next to the report name on the List View and identify it as a favorite or click the star on the report's Detail View.
- To print the report in PDF format, click **Print as PDF**. Specify whether you want to open it with an application such as Adobe Acrobat or save it on your local machine.
- To delete one or more reports listed on the Reports home page, select them in the List View and click Delete. Or click Delete in the report's Detail View.

To duplicate a report

1. Click Duplicate on the report’s Detail View page.

2. Select from the Duplicate drop-down list to retain the original report type or change it to a different type.

The filters in the original report are copied to the new report.

Note: You cannot save a Summation or a Summation with Details report with more than three group-by columns as a Matrix report.

3. Edit the new report as needed.

4. Rename the report and save it.

Viewing and creating Tracker Reports

A tracker displays recently accessed records in the Last Viewed listbelow the module tabs. Trackers also enable users to navigate back and forth between previously accessed records.
Tracker reports provide administrators and supervisors visibility in user actions and system performance. These reports display user actions such as records views and other page views such as records saves. For example, you can run a report on the number of modules a specific user accessed on a particular day and the actions performed in those modules. Trackers allow users to keep track of records that they access during their current session.
The data viewed in a Tracker report depends on team membership. When viewing tracker reports on user activity, you can only view your own data and data for users who report to you. For example, supervisors can view their own activities as well as the activities of their subordinates. Administrators can track activities for everybody.
The administrator must assign the Tracker role to a user to enable the user to view tracker data and create tracker reports.
Tracker reports are broadly classified into the following types:

- Trackers
- Tracker Queries
- Tracker Sessions
- Tracker Performance

Trackers:
This report tracks all page requests from users displays the following information:

Columns	Description
Action	Pages viewed and records saved

Date of Last Action	The date and time when the action was performed
Item ID	The record ID
Item Summary	The record name or description
Session ID	The ID assigned to the session
Team ID	The ID of the user's private team
User ID	The ID of the user who performed the action
Record Visible	If set to True, the records display as breadcrumbs
Monitor ID	Related Tracker Performance information

Tracker Queries:
This report tracks queries that exceed the slow query time limit and displays the following information:

Columns	Description
Date Last Run	The date when a particular query that was over the threshold was last run
Query Count	Number of times the query was run
SQL Text	The pattern of a particular SQL statement
Average Seconds	The average time taken to run the query
Total Seconds	The cumulative time taken to run the query. That is, if a query was run more than once, the cumulative time reflects the total of all the query runs.

Tracker Sessions:
This report tracks user access session data and displays the following information:

Columns	Description
Session Active	If set to True, an action has been tracked for the user within the last 20 minutes. An active user is defined as a user that has taken action w/in

Date Start	The date that the session started. That is, when the first action was tracked.
Date of Last Action	The date and time that the last recorded trackable action occurred.
Action Count	The number of trackable actions
Seconds Active	The total number of seconds between the Date Start (login) and Date of Last Action
Session ID	The ID assigned to the session. If a user starts another session without logging out of an existing session, a new session ID is assigned to the user, and the new session is marked as Active (Active = True).
Client IP Address	The IP Address of the client.
User ID	The ID of the user who performed the action
Record Visible	If set to True, the records display as breadcrumbs
Monitor ID	Related Tracker Performance information

Tracker Performance:
This report tracks performance-related information and displays the following information:

Columns	Description
Date of Last Action	The date and time that an action was performed.
Database Roundtrips	The number of database calls that the action involved.
Files Accessed	The number of php files used to perform the action.
Memory Usage	The amount of memory used, in bytes, to perform the action
Server Response Time	The time, in seconds, taken by the server to respond.

Sugar provides several pre-defined reports. You cannot edit these reports. Some of the pre-defined reports, based on the most frequently used queries such as module usage, are available through the Tracker tab on your Home page. Other pre-defined reports, listed below, are available through the

Reports module. You need access permissions from the administrator to view the Tracker tab and to run and create tracker reports.

- My Usage Metrics: This report displays the cumulative sum for the server response time (in seconds), total database round trips and total files opened by the user for a specified time period such as a day, week, or month.
- My Module Usage: This report displays the cumulative sum for each module you accessed for a specified time period such as a day, week, or month.
- Slow Queries: This query report lists SQL queries that were slow to execute and the time taken for execution.
- Users Usage Metrics: This sessions report lists the cumulative sum for the server response time (in seconds), total database round trips, and total files opened by the user.
- My Records Modified: This report lists the modules that were modified in the past week.
- My Recently Modified Records: This report displays recently modified modules.
- Modules Used by My Direct Reports: This report displays the cumulative sum of each module used during the last 30 days by your direct reports. Modules that each reportee used are grouped together and presented in a separate horizontal bar.
- Records Modified by My Direct Reports: This report displays the modules in which your direct reports recently modified records.
- Active User Sessions: This report displays active sessions for a specific user during the last seven days.
- User Sessions: This report displays active sessions for all users during the last seven days.

To create a tracker report

1. Click Create Report on the Reports tab.
2. Select the report type such as Summation or Matrix on the Report Wizard page.
3. Select the Tracker Report type of your choice and follow the process described in Creating Standard Reports.

Creating Advanced Reports

Advanced reports enable you to use complex SQL queries that cannot be expressed in standard reports. Only administrators can create advanced reports and make them accessible to the appropriate users. Users can use advanced reports if the administrator grants them permission to view and run them.
An advanced report is a combination of three separate elements:

- A SQL query to gather data from the Sugar database.
- A data format that specifies how to format the report and the SQL query to use.
- A report header that contains information such as the report name and the data format. You can associate multiple data formats with a report.

Header information such as the report name and title are defined by the user during advanced report creation. The report is saved and then edited to specify the data format. The data format must include the SQL query used to generate the report output. Depending on the queries and data formats used, the report can contain multiple data sets. Each individual data set can be exported separately.
To create an advanced report

1. Click Manage Advanced Reports in the Actions drop-down list in the Reports tab.
2. Click **Create Advanced Report** in the Actions drop-down list in the Advanced Reports tab.
3. Enter information for the following fields in the Create (Advanced Report) page:

Report Name. Enter a name for the report.
Report Title. Enter a title for the report.
Description. Enter a brief description of the report.
Report Alignment. Select the alignment of the report text from the drop-down list.
Team. Select the name of the new primary team from the drop-down list to change the primary team assignment
Click Select to assign additional teams to the record, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.

4. Click **Save**.

This displays the new report in the List View of the Advanced Reports page.

5. Click the report name in the list to view the Detail View of the created Advanced Report.
6. To select a data format, click **Select** in the Data Format sub-panel and click the desired data format from Data Format Search or Data Format List..

To create a new data format, click **Create New** in the Data Format sub-panel. For more information, see To create a data format.

7. Click **Run Report** to generate the report.

Using SQL Queries

Advanced reports enable you to create reports using complex SQL queries that cannot be expressed in standard reports. You can use a SQL query in multiple reports.
To create a SQL query

1. Click Manage Advanced Reports from the Actions drop-down list in the Reports tab. and then click **Create Custom Query**.

2. On the Custom Queries page, enter information for the following fields:

Query Name. Enter a name for the query.
Lock Query. Select this box if you want to ensure that nobody edits the query.
Team. To change the primary team assignment, select the name of the new primary team from the drop-down list.
To assign additional teams to the record, click Select, and choose the team from the Team List, or click Add to add team fields and enter the team names. For more information on teams, see Assigning Records to Users and Teams.
Description. Enter a brief description of the query.
Custom Query. Enter the SQL query in this field.

3. To save the query, click **Save**.

Creating Data Formats

A data format specifies report formatting details such as the text font, text color and the background color. A data format can also specify a SQL query. You can reference other data formats within a data format. A data format can contain more than one SQL query. 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 useful to produce information from separate queries in a parent-child pattern. A given data format can specify a parent data format, interlocking the two data formats to produce a master Rows and Column report. When the report runs, the query associated with the parent data format is executed and, for each row returned, is associated with the child data format. The values that bind the two queries are specified by the {SUB} parameter in the child query.
For example, if the parent data format contains the following query:
select name, id from accounts
and the child data format contains the following query:
select opportunities.name, opportunities.amount from opportunities
left join accounts_opportunities on accounts_opportunities.opportunity_id = opportunities.id
left join accounts on accounts_opportunities.account_id = accounts.id
WHERE accounts.id = '{sub}id{sub}'
The combined data format does the following on execution:

- Return and format one row of information from the Accounts table.

- Return and format as many Opportunities rows matching the ID value of the current account.
- Repeat for each applicable account row.

Note: A given data set identified as a parent in an interlocked data format cannot appear as a parent in another.

To create a data format

1. Select **Create Data Format** from the Actions drop-down list of the Advanced Reports tab.

This displays the Data Formats >> Create page.

2. Enter information for the following fields in the Data Formats Create page:

Data Format Name. Enter a name for the data format.
Report Name. Sugar populates this field with the report name when you associate this data format with the report.
Query Name. Click **Select** and, in the Custom Query List, click the name of a query to associate it with the data format.
Sub/Child Query. Sugar populates this field with the name of the child query if the selected query has a child query.
Parent Data Format. Click **Select** to create a child for another data format, click the name of the data format to select it from the Data Format List.
Description. Enter a brief description of the data format.
Table Width %. Select Percentage or Pixelsfrom this drop-down list and enter a numeric value in the adjoining field.
Font Size. Select the font size for the report text from this drop-down list.
Exportable (CSV File Only). Select this box to enable users to export the data format in CSV format.
Header Text Color. Select a color for the report header from this drop-down list.
Show Header. Select this box to display the report header in the report.
Body Text Color. Select a color for the report text from this drop-down list.
Combine with Previous Data Format. Select this box to specify whether to leave a space between data format tables for display purposes.
Header Background Color. Select a background color for the report header from this drop-down list.
Group with Previous Header. Select this box to specify whether to make column widths the same as the data format above it.
Body Background Color. Select a color for the body background from this drop-down list.

3. Click Save to save the format; Click Cancel to exit the page without saving the format.

Scheduling Reports

You can schedule to run a report at periodic intervals. Sugar runs the report at the specified intervals and emails it to you as a PDF file.
To schedule a report

1. Navigate to the List View of Reports.

2. Click --none--in the Schedule Report column for any report in the list.

This displays the Schedule Report dialog box.

3. Enter values for the following fields in the Schedule Report dialog box:

Start Date. Click the Calendar icon and select a date to begin scheduling the report. You can specify the time in hours and minutes from the adjacent drop-down fields.
Time Interval. Select intervals at which the report runs and the output is received, from this drop-down list.
Active. Check this box to activate the schedule. The date and time of the next email is now displayed in the Schedule Report column. If you do not check this box, the schedule is not activated and the Schedule Report column displays **--none--**.
Next Email. The date and time that you specified displays in this field. This is the time when the report is emailed to you.

4. Click Update Schedule.

Sugar schedules the report at the specified time and emails the PDF file.

Export

Overview

You can export Sugar records in .csv format to your local machine. Use Microsoft Excel, Notepad, or other text editors to open .csv files.
The .csv file displays column titles, including the Record ID (a long string of letters and numbers used as a unique reference to each account record) and all the other fields in the module.

Exporting Data

Note: When exporting values for drop-down list options, Sugar exports the ID associated with each option (that is, item name) and not the display labels.

If you are exporting records that are assigned to multiple teams, the Team_Name column displays all the assigned teams for each record.

To export data from Sugar

1. Select the records from the List View on the module’s home page.
2. Select Export from the Actions drop-down menu in the List View.

To export all records listed on the page, click Select located above the item list and select one of the following options:
This Page. To export all the records listed on the page, select this option.
All Records. To export all records on the list (if it is more than a page long), select this option.
This displays an Opening.csv dialog box.

3. Select **Open** to open the export file in .csv format or select Save to Disk to save the .csv file to your local machine.
4. Click **OK** to execute the operation. If you chose to open the file, the csv file opens in Microsoft Excel.

The file contains all the fields in the module from which you are exporting the data.

Import

Overview

Import data for modules such as Accounts, Contacts, Leads, Opportunities, Targets, Calls, Meetings, and Tasks with the help of an easy-to-use **User Import Wizard**. For the Contacts, Leads, Users, Targets or any other person-type module, you can import data from your Google Contacts list. Refer to the tool-tips and instructions provided in the wizard at every step of the import process.

User Import Wizard features

Features of the User Import Wizard are listed below:

- Sample .csv file for easier import of data — Use the available sample .csv file as a template for import of files
- Retain settings from previous imports — Save/preserve import file properties, mappings, and duplicate check indexes from previous imports for ease of current data import process
- Ability to accept both database name and display labels of drop-down and multi-select field items — Field labels as well as database names are accepted and mapped during import, but only the field labels are displayed for ease of use
- Ability to accept both usernames and full names in user fields during import and export of data — Full names of Users displayed for Assigned To and other User-related fields in exported .csv file for easier identification of user records
- Ability to auto-detect file properties in import file — Upload import files without specifying file properties such as tab, comma, double and single quotes, date and time formats, making the process simpler and faster
- Ability to import contacts from external sources such as Google — Ability to import Google Contacts for person-type modules such as Contacts, Leads, and Targets, relate Sugar records to Google and LinkedIn Contacts, and communicate with Google Contacts from within Sugar

Importing data

Note: Always import the Account data first and then import Contacts and other data related to Accounts (such as Meetings, Calls, Notes) to automatically create a relationship between the imported Account and Contacts and activity records related to the Account.

Follow the steps listed below to import data for a module, such as Accounts:

1. Select Import from the **Actions** drop-down list on the module's tab.

This displays Step 1 of the import process with a link to a sample Import File Template.

Note: The options in this step are different for person-type modules.

2. Upload your import file to this page using the Browse button in the Select File field or,

Optionally, download the available template, delete the existing data, input your data and upload to this page using the Browse button.

3. Click Next.

4. This displays Step 2 (Confirm Import File Properties).

Auto-detection of imported data takes place at this step.

5. Click **View Import File Properties** button to verify and change the data as needed, if you notice irregularities in the Confirm Import File Properties table.

6. Click the Hide Import File Properties to collapse the panel.

7. Click Next.

This displays Step 3: Confirm Field Mappings.
The table in this page displays all the fields in the module that can be mapped to the data in the import file. If the file contains a header row, the columns in the file map to matching fields.

8. Check for correct mapping and modify if necessary.

9. Map to all of the required fields (indicated by an asterisk).

10. Click Next.

11. This displays Step 4: Check for Possible Duplicates.

12. Follow the instructions on this page.

Step 4 also provides the option of saving the current import file properties, mappings, and duplicate check indexes for future imports.

13. (Optionally) Save the import settings.

14. Click Import Now.

15. This displays Import Results (Created Records, Duplicates and Errors).

16. Click the Errors tab to check for errors in the process. Follow the instructions to fix problems (if any) and **Click Import Again**.

This displays Step 1 of the import process.

17. Follow all the steps in the wizard through Step 5.

If the import was successful, you can to view all the imported records at Step 5.

18. Click Undo Import if you are not satisfied with the imported records,

Or, click Import Again to import more data
Or, click Exit to navigate to the List View page of the module that you imported your records into.

To import data from Google

Follow the steps listed below to import data from Google Contacts for person-type modules such as Contacts, Leads, Users, and Targets:

1. Select **Import Data** from the **Actions** drop-down list on the module's tab.

2. This displays Step 1: Select Data Source.

3. Select (My data is in:) an external application or service.

4. Click Sign in.

5. This displays the <**User name**>>> **Edit** page.

6. Select Google from the **Application** drop-down list.

7. Enter your Google account credentials in the **App User Name** and **App Password** fields.

8. Click **Connect**.

This brings you back to the **Import » Step 1: Select Data Source** page.

9. Follow the steps described in **To import data** listed above.

Employees

Overview

Use the Employees module to view information such as name, title, and email address for employees in your organization.
All Sugar users are Employees, not all Employees are Sugar users. An Employee needs a username and password to log into Sugar to be a user.

Creating Employees

Administrators can create and manage Employee records. Users can only view an Employee's record.

To create and manage an Employee record

1. Select Create Employee from the Actions drop-down list of the Employees tab.

The Employees page displays on the screen.

2. Enter the Employee's information such as name and phone numbers.

To add the Employee's photo, click the Browse button located next to the Picture field, navigate to the location of image file and upload it into the record. You can upload the image file in JPG or PNG format.

3. Click Save to create the record; click Cancel to exit the page without creating the record.

Sugar displays the record in the List View of the Employees Home page.

4. To update information on the supervisor or status of multiple Employees, use the Mass Update panel as described in Editing and Deleting Multiple Records.

5. To delete an Employee, click the Delete button in the record's Detail View.

To view or contact an Employee

- To search for an Employee, use the Search sub-panel located above the Employees list.

- To view an Employee’s details such as the title and contact information, click the Employee name in the list.
- To email an Employee, click the user’s email address to open Microsoft Outlook and create the email.

Mobile Browser

Overview

Sugar Mobile Browser enables you to access the HTML view of Sugar designed for your mobile device, such as a Smart Phone, to perform activities and manage your assigned records. You can view all records that are assigned to you, your teams, and your direct reports.

Using Sugar Mobile Browser

You can perform a basic search from your wireless device in the same manner as you do on your local machine. You can search for only your assigned records or for all records assigned to your teams and your direct reports.
If you have saved searches in the Sugar application, you can view them from a wireless device as described in To use saved searches. For more information on creating Saved Searches, see Saving Search Criteria and Layout.

Viewing and creating records from Sugar Mobile Browser

Depending on the module that you access, you can also create records from a wireless device. However, you cannot delete records from Sugar Mobile.
The table below lists the types of records that you can view and create from a mobile device.

Modules	View Records	Create Records
Accounts	X	X
Contacts	X	X
Leads	X	X
Calls	X	X
Meetings	X	X
Tasks	X	X

Opportunities	X	
Cases	X	
Employees	X	

To view Sugar records from a mobile device

1. Enter the URL of your Sugar application in the browser on your mobile device.

Note: If you are unable to access the mobile view from your mobile device using your regular Sugar instance URL, append “&mobile=1” to the end of the URL, after the entire URL loads.

2. Log into the Sugar application with your Sugar username and password.

Note: Ensure that css and Javascript are enabled for the browser on your wireless device to successfully log into Sugar.

The Welcome page displays activities for the day as well as a list of records that you last viewed. You can select the module you want to access on this page.

3. To access a module, select it from the drop-down list and click Go.
This displays a Search form. By default, the Only my items option is selected to filter for records that are assigned to you.

4. To search for all your assigned records, leave the search field blank and select the Only My Items box; click Search.

5. To search for a specific record within the module, enter the record name in the search field and click Search. If the record is not assigned to you, deselect Only my items before you begin the search.

Note: You cannot use related records as a search filter in mobile view.

Sugar displays the search results on the screen.
The list of records is paginated. The administrator sets the number of records that display per page.

6. To view a record, select it from the list.

The record’s Detail View displays on the screen. You can edit records that are assigned to you on this page. You cannot edit records that are not assigned to you.

7. To edit a record, scroll down and click Edit.

This displays Edit View of the record.

8. Make the necessary changes and click Save.

9. To view a list of related records, scroll down to the Related Information sub-panel in the Detail View of the record.

The list of related records is paginated. The administrator sets the number of related records that display per page.

10. To view the details of a related record, select it from the Related Records list. This displays the Detail View of the related record.

11. To edit the related record, click **Edit** in the Detail View page of the related record.

12. Make the necessary changes and click Save.

To create Sugar records from a mobile device

1. Select a module from the drop-down list, and select Create.

This displays the new record's fields.

2. Enter the necessary information such as the record name and the user assigned to it.

3. Click Save.

This displays the record's Detail View.

4. To add a related record such as an activity, scroll down to the Add Related Information field and select a module from the drop-down list.

5. Click Add.

6. Enter the necessary information and click Save to create the related record.

You can view the record in the Related Information sub-panel of the primary record. You can add multiple related records.

7. To edit the primary record, click Edit, make the necessary changes and click Save.

To use saved searches

1. Select the saved search you want to use from the Saved Searches drop-down list.

2. Click Search.

This displays the saved search results.

3. To view a record, select it from the saved search results.