SUGARCRM
THE CLOUD IS OPEN

Sugar Enterprise Application Guide

Version 6.0.0

Sugar Enterprise Application Guide
Version 6.0.0, 2010

License

Disclaimer

Trademarks

Contents

Preface

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

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 Enterprise 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!

About this Guide

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

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

Audience

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

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. Because many of these steps are interrelated, 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 Management

- Lead, Contact, and Opportunity Management to share information and pursue new business

- Account management to manage all customer interactions in a single location

- Automated quote generation to present compelling product offers

- Sales forecasting and pipeline analysis to give salespeople and managers greater visibility

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 reporting to analyze the effectiveness of marketing activities

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

Reporting

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

Administration

- Quickly edit user settings, views and layouts in a single location
- Define how information flows through Sugar (Workflow Management) and what actions users can take with information (access control)
- Customize the application with Sugar Studio so that Sugar meets the exact needs of your company

What's New in 6.0.0

With each revision of the Sugar application, significant advances are made, in both the feature set and usability of the software. In 6.0.0, the Sugar User Interface has been extensively redesigned and several features have been added or enhanced to improve user experience and performance.

Some of the major changes are listed below. For information on impact on customizations, see "**Upgrade Impact on Sugar Customizations**".

Getting Started

- A new Admin Wizard guides administrators through branding Sugar for their organization.
- A new User Wizard guides users through configuring their user profile and preferred settings in Sugar.

UI Changes

- An updated Sugar theme features a cleaner design with larger fonts and brighter icons.
- The Shortcuts menu has been removed, and the module action links have been moved to the Actions list in the module tab menus.
- The Last Viewed links have been moved into Module tabs to enable you to quickly access records in other modules without navigating away from your current page.
- A slider bar hides global links that you do not access frequently.
- A new Shortcut Bar enables you to access Quick Create Forms from any page.
- Global Search has been enhanced to display initial results within your current page. The search results are module-weighted and display results from the current module first, followed by results from other modules.
- Basic Search has been simplified to search only by record name. For contacts, you can search by first, last, or full name.

- List View has been modified as follows:
  - The Edit icon has been moved to the left.
  - The Information icon has been moved to the right.
  - Buttons for actions such as Merge, Export, Delete, and Email have been removed, and these options have been moved to the Actions menu.
  - The Mass Update panel does not display on the page by default. The Mass Update option is now listed in the Actions menu.
- The name of the record, module, and system now appear in the browser tab.
- The Grouped Modules feature has been removed. All modules set to be displayed will appear in the navigation bar.
- The Quick Create Form that displayed below the Shortcuts menu has been removed and will no longer appear in any Sugar theme.
- The Sitemap is not available in the new Sugar theme, but is available in other themes.
- The "Enter Business Card" feature has been removed from the Contacts module. Hence, it will not display after your instance is upgraded to Sugar 6.0.

Studio and Module Builder Enhancements

- You can edit properties for standard fields including field lengths and whether the field is required or audited.
- You can customize Quick Create forms for custom modules.
- You can customize the Convert Lead form to add new fields and new related modules.
- You can customize "Select" pop-up windows.
- You can revert from customized layouts to the default layouts.
- You can specify the next number in Quotes, Cases, and Bug Tracker, as well as in custom modules created using the Issue template.
- You can display layout panels as tabs.
- You can set the Address field as a required field.
- You can set Email Address as a required field.
- You can add custom fields to Sugar Dashlets and to Sugar Dashlet Search.
- New field types, "DateTime" and "Image". DateTime creates a field to enter the date and time. Image creates an image field to upload an image for display in a record.
- Custom modules based on the Person template now display an Email option in the Actions drop-down list in the List View. Users can use this option to compose emails without navigating away from the page.
- You can localize relationship labels.

Related Documentation

Refer to the following guides for related information:

- *Sugar Offline Client Installation Guide*: Describes how to install and use the Sugar Offline Client with Sugar Enterprise.

- *Sugar Portal Installation and User Guide*: Describes how to install and use Sugar Portal to view, edit, and create objects in Sugar Enterprise.

- *Sugar Plug-in for Microsoft Word*: Describes how to install and use the Sugar Plug-in for Microsoft Word.

- *Sugar Plug-in for Microsoft Excel*: Describes how to install and use the Sugar Plug-in for Microsoft Excel.

- *Sugar Plug-in for Microsoft Outlook*: Describes how to install and use the Sugar Plug-in for Microsoft Outlook.

Installing and Upgrading Sugar

This chapter describes how to install and upgrade Sugar Enterprise. This information is intended for administrators. After installation, you can create users and perform other administrative tasks in Sugar.

Topics are as follows:

- **Installation Prerequisites and Guidelines**
- **Downloading and Installing Sugar**
- **Upgrading Sugar**
- **Converting Sugar Editions**
- **Using the Sugar Silent Upgrader**
- **Uninstalling a Sugar Instance**

Before installing Sugar 6.0.0, ensure that you have the appropriate components installed on your server. See the *Sugar Enterprise Release Notes* for a complete list of the supported software versions.

Note: Install the MB String module on your Web server to support multi-byte characters.

Installation Prerequisites and Guidelines

The installation prerequisites and guidelines are listed below.

Memory Requirements

Increase the value of the `memory_limit` parameter in the *php.ini* file as follows:

- MySQL Server: 96M or higher
- MS SQL Server: 96M or higher
- Oracle: 128M or higher

Note: If installing demo data, increase the memory limit to 384M or higher.

Database Requirements

- If you are using MySQL, install version 5.0 or higher to use with Sugar 6.0.0.

- If you are using Microsoft SQL Server, you need to download the SQL Server Driver for PHP version 1.1 from Microsoft. and extract the contents to the /ext directory of the PHP installation.

  Select from the following DLLs as appropriate for the PHP version you are using.

Driver File	PHP Version	Thread Safe	Use with PHP .dll
php_sqlsrv_53_nts_vc6.dll	5.3	No	php5.dll
php_sqlsrv_53_nts_vc9.dll	5.3	No	php5.dll
php_sqlsrv_53_ts_vc6.dll	5.3	Yes	php5ts.dll
php_sqlsrv_53_ts_vc9.dll	5.3	Yes	php5ts.dll
php_sqlsrv_52_nts_vc6.dll	5.2	No	php5.dll
php_sqlsrv_52_ts_vc6.dll	5.2	Yes	php5ts.dll

  Then add the following line in *php.ini* to enable it:

  `extension=<`**`dll_name`**`>;`

  where **`dll_name`** is a driver file listed in the table above.

  The driver also requires you to install the Microsoft SQL Server Native Client on the Web server. Install the version for SQL Server 2008 even if you are installing on SQL Server 2005.

- For accurate data storage on Oracle databases, you must ensure that the character set is set to AL32UTF8 in NLS_LANG setting on the client machine. If not, Search may not function correctly. A typical example for a user in the US is AMERICAN_AMERICA.AL32UTF8.

Securing Your Sugar Installation

To ensure that your Sugar installation is secure from unauthorized access, for Apache, it is recommended that you configure the system as described below.

Before you install Sugar, set `AllowOverride` to `All` for the Sugar installation directory in the *httpd.conf* file. After you install Sugar, a *.htaccess* file is created in your Sugar installation directory. This file contains the following content:

```
# BEGIN SUGARCRM RESTRICTIONS
RedirectMatch 403 (?i)^.*\.log$
RedirectMatch 403 (?i)/+not_imported_.*\.txt
RedirectMatch 403 (?i)/
+(soap|cache|xtemplate|data|examples|include|log4php|metadat
a|modules)/+.*\.(php|tpl)
RedirectMatch 403 (?i)/+emailmandelivery\.php
RedirectMatch 403 (?i)/+cache/+upload
# END SUGARCRM RESTRICTIONS
```

To test the validity of these restrictions, access the *sugarcrm.log* through the browser to ensure that `error #403` is displayed. If not, check your Apache configuration to

ensure that htaccess is enabled. For more information, check the Apache documentation.

Compatibility Matrix

SUGAR BUILDING BLOCKS	SUPPORTED VERSIONS	COMMENTS
PLATFORMS		Sugar runs on any OS that runs PHP
• Linux	Red Hat 4.x, 5.x (Advanced Server, Enterprise Server) Oracle Enterprise Linux 5.1 CentOS 4.x, 5.x	
• Windows	XP, 2003, 2008, Vista	
• Mac	OS X	
PHP		
PHP	5.2.1- 5.2.6, 5.2.8 - 5.2.13, 5.3.0-5.3.2	The PHP setting, MBstring.func_overload =7 is supported
DATABASES		
• MYSQL	5.0x, 5.1	Strict mode is supported for MYSQL
• MS SQL Server	2005, 2008	
• ORACLE	9i, 10g	Supported only in Sugar Enterprise.
WEB SERVERS		
• Apache	1.3x, 2.0x, 2.2x	Supports any version that runs PHP
• IIS	6.0, 7.0	
MAIL SERVERS		
• Exchange		
• QMail		
• GMail		
• Yahoo		
SUGAR PLUG-INS		
• Sugar Plug-In for Microsoft Outlook	Outlook 2003, 2007	
• Sugar Plug-in for Microsoft Word	Word 2003, 2007, XP	
• Sugar Plug-in for Microsoft Excel	Excel 2007	
• Client (Browser)	Firefox 2.0, 3.0, 3.5, 3.6 IE 7.0, 8.0 Safari 4.0	
MULTIMEDIA		
• Adobe Flash	7.0 and above	
RECOMMENDED STACKS		
Linux Stack		

• PHP version	5.2.8	
• Apache	2.0.63, 2.2.4	
• RedHat Enterprise	Workstation 4	
Preferred Databases MySQL SQL Server	5.1 2005	
Oracle	10g	Supported only in Sugar Enterprise
Windows Stack		
• Windows	2003	
• PHP version	5.2.8	
• IIS	6.0	
Preferred Databases MySQL SQL Server	5.1 2005	
• Oracle	10g	Supported only in Sugar Enterprise.

Downloading and Installing Sugar

If you are installing Sugar on your machine for the first time, follow the instructions in this section. If you have an earlier version of Sugar installed on your machine, refer to "**Upgrading Sugar**" for instructions on how to upgrade your Sugar instance.

The process of installing Sugar is as follows:

1. Depending on your platform, Linux or Windows, install the appropriate version of PHP, web server, and database on your machine as listed in the Compatibility Matrix.

2. Download Sugar files.

3. Copy the Sugar files to your Web server. Check for dependencies and requirements, and set them.

4. If the `global_variables` parameter is not set to "`EGPCS`", navigate to the *php.ini* file located in your Sugar root directory, and change it. Restart the web server before proceeding with the installation.

5. Install Sugar Enterprise with the Sugar Setup Wizard.

Note: If you made changes in the *php.ini* file, ensure that you restart the web server before proceeding with the installation.

To download the latest Sugar files

1. Go to http://www.sugarcrm.com/

2. Navigate to *Support & Training/Support Portal* or visit http://www.sugarcrm.com/sugarshop/downloads.php.

3. Log in using your Sugar user name and enter the password associated with your account.

4. Click Download Purchased Software.

5. On the Download Manager page, enter your download key into Download Key field and click **Submit**.

6. Click the link to the appropriate zip file to download it. For example, *Sugar Ent-6.0.0.zip*.

To copy Sugar files to the web server

After you download Sugar, you need to unzip the files and set permissions.

1. Locate your *webroot* directory on your Web server. This is the directory on your Web server where publicly accessible files are made available by your Web server. Common locations for Web root include:

   /var/www/html/ (*Linux/Apache*)

   C:\Inetpub\wwwroot\ (*Windows/IIS*)

   C:\Program Files\Apache Group\Apache\htdocs\ (*Windows/Apache*)

   /Library/Web server/Documents/ (*MacOS X/Apache*)

2. Unzip the Sugar zip file into your webroot. A directory is automatically created within webroot.

3. Rename this directory at any time.

4. Set permissions on the Sugar files. The following directories, all subdirectories, and files must be writable by your Web server user:

   o cache

   o custom

   o data

   o modules

   o config.php

   For example:

   "chgrp ApacheUser.ApacheGroup <*SugarInstallRoot*> -R" recursively sets ownership for root directory to apache user and group.

   "chmod 755 <*SugarInstallRoot*> -R" recursively sets permissions to Read/Write, Execute for the owner, and Read/Execute for everyone else.

   The system user that your Web server uses to access files in your webroot varies depending on your operating system configuration. Common Web server users include:

   o apache (Linux/Apache)

   o nobody (Linux/Apache)

   o IUSR_computerName (Windows/IIS)

   If you are unsure of your Web server user, consult your system administrator.

5. Prior to viewing Sugar through the browser, ensure that file permissions are set for Read/Execute to "includes" directory and "sugar root directory "(in addition to the already existing list of directories/files).

Using the Sugar Setup Wizard

After you copy the Sugar files into your web root, you can use the Sugar Setup Wizard. The Sugar URL *http://<yourServer>/<yourSugarDirectory>/install.php* is the URL you will use to access the Sugar Setup Wizard.

For example: `http://localhost/Sugar-Full_6.0.0/install.php`

You can perform a typical installation or a custom installation. While typical installation is recommended, you can choose custom installation for the following reasons:

- You do not want to use the same Database Admin User as the Sugar database administrator.
- You want to specify the locale settings during installation instead of specifying it after you log into the Sugar application.

To perform a typical installation of Sugar

1. Launch the browser and enter the URL described above.

   Sugar displays the Welcome page.

2. Click **Next**.

   The Installer displays installation instructions and requirements to help determine if you can successfully install Sugar.

3. After you review the information, click **Next**.

   The Installer displays the Sugar License Agreement screen.

4. Review the license, check "I Accept", and click **Next**.

   The installer checks the system for compatibility and then displays the Installation Options screen.

   > **Note:** At any time prior to clicking **Install** in the Confirm Setting menu, you can modify any of your settings. To modify any settings, click the **Back** button to get back to the appropriate screen.

5. Select Typical Install. If you have the license key, you can enter it in the Download Key field. If not, you can enter it after you have installed the application.

6. Click **Next**.

7. The Database Type screen displays next.Select the database that is installed on your system and click **Next**.

   The Database Configuration screen displays next.

   a. Enter the database name. The Installer uses *sugarcrm* as the default name for the database. However, you can specify a new name for the database.

   b. For My SQL and SQL Server, enter the Host Name or the Host Instance.

    c.   If your database server is running on the same machine as your Web server, the host name is, by default, set to *localhost*.

    d.   Enter the username and password for the Database Administrator. Then, specify the Sugar Database Username.

    e.   Ensure that the Database Administrator you specify has the permissions to create and write to the Sugar database.

        For My SQL and SQL Server, by default, the Installer selects the Admin User as the Sugar Database User. The Sugar application uses Sugar Database User to communicate with the Sugar database. But, at this time, you can create a different Sugar Database user.

        To select an existing user, choose **Provide existing user** from the Sugar Database Username drop-down list. To create a new Sugar Database user, choose **Define user** to create. Enter the database user name and password in the fields that display below. Reenter the password to confirm it. This new user information will display under "System Credentials" on the Confirm Settings page at the end of the installation process.

    f.   Accept **No** as the default value if you do not want the Sugar Demo data. If not, select **Yes** to specify that you want to populate the database with the Sugar Demo data.

8.   Click **Next**.

    The Installer validates the credentials of the specified administrator. If a database with that name already exists, it displays a dialog box asking you to either accept the database name or choose a new database. If you use an existing database name, the database tables will be dropped.

9.   Click **Accept** to accept the database or else click **Cancel** and enter a new name in the Database Name field.

    The Installer displays the Site Configuration screen on the page.

10. Enter a name for the Sugar administrator. This is the user who will have administrative privileges in Sugar. The default name is "admin", but you can change it.

11. Enter a password for the Sugar admin, re-enter it to confirm the password, and click **Next**.

    The Installer displays the Confirm Settings screen. This screen displays a summary of the settings that you specified. If you want to change the settings, click **Back** to navigate to the previous screens.

12. To obtain a printout of the settings for your records, click **Print Summary**.

    To include the database user password and the Sugar admin password in the printout, click **Show Passwords** and then click **Print Summary**. When you click **Show Passwords**, the system displays the passwords and changes the button name to **Hide Passwords**. You can click this button to hide the passwords again.

13. To begin the installation process, click **Install**.

    The Perform Setup page displays the installation progress on the screen.

14. When the setup is complete, click **Next**.

15. The Installer displays the Registration page on the screen.

    Registration is optional.

16. To register your Sugar instance with SugarCRM, enter the necessary information and click **Send Registration**; or else click **No Thanks** to skip registration.

    The Sugar login page displays on the screen. You can now log into Sugar with the Sugar admin name and password that you specified during installation.

To perform a custom installation of Sugar

1. Launch the browser and enter the URL described above.

    The Welcome page displays on the screen.

2. Click **Next**.

    The Installer displays installation instructions and requirements to help determine if you can successfully install Sugar.

3. After you review the information, click **Next**.

    The Installer displays the Sugar License Agreement screen.

4. Review the license, check "I Accept", and click **Next**.

    The Installer checks the system for compatibility and then displays the Installation Options screen.

    Select **Custom Install** and click **Nex**t.

5. The Installer displays the Database Type screen. Select the database of your choice and click **Next**.

6. Enter the database name.

    The Installer displays *sugarcrm* as default name for the database, but you can specify a new name for the database.

    a. For My SQL and SQL Server, enter the Host Name or the Host Instance.

       If your database server is running on the same machine as your Web server, the host name is, by default, set to *localhost*.

    b. Enter the username and password for the Database Administrator. Then, specify the Sugar Database Username.

       Ensure that the Database Administrator you specify has the permissions to create and write to the Sugar database.

       For My SQL and SQL Server, by default, the Installer selects the Admin User as the Sugar Database User. The Sugar application uses the Sugar Database User to communicate with the Sugar database. But, at this time, you can create a different Sugar Database user.

       To select an existing user, select **Provide existing user** from the Sugar Database Username drop-down list. To create a new Sugar Database user, select **Define user** to create. Enter the database user name and password in the fields that display below. Reenter the password to confirm it. This new user information will display under "System Credentials" on the Confirm Settings page at the end of the installation process.

c. Accept **No** as the default value if you do not want the Sugar Demo data. If not, select **Yes** to specify that you want to populate the database with the Sugar Demo data.

7. Click **Next**.

The Installer validates the credentials of the specified administrator. If a database with the specified name already exists, it displays a dialog box asking you to either accept the database name or choose a new database. If you use an existing database name, the database tables will be dropped.

8. Click **Accept** to drop current tables or else click **Cancel** and specify a new database name.

9. Click **Next**.

The Installer displays the Site Configuration screen.

10. Enter the URL of your Sugar instance.

11. Enter a name for your system to display to users on the Sugar application's browser title bar.

12. Enter a name for the Sugar administrator. This is the user who will have administrative privileges in Sugar. The default name is "admin", but you can change it.

13. Enter a password for the Sugar administrator, re-enter it to confirm the password, and click **Next**.

The Installer displays the security options on the Site Security screen.

14. Select the security options of your choice and specify the necessary information in the appropriate fields.

15. Click **Next**.

The Installer displays the Confirm Settings screen. This screen displays a summary of the settings that you specified.

16. To include the database user password and the Sugar admin password in the printout, click **Show Passwords,** and then click **Print Summary**.

17. To begin the installation process, click **Install**.

The Perform Setup page displays the installation progress on the screen.

18. When the setup is complete, click **Next**.

19. The Installer displays the Registration page on the screen.

Registration is optional.

20. To register your Sugar instance with SugarCRM, enter the necessary information and click **Send Registration**; or else click **No Thanks** to skip registration.

The Installer displays the Sugar log-in page on the screen. You can now log into Sugar with the Admin user name and password that you specified during installation. You can set up Sugar during the login process, or you can set it up after you have logged in. For more information, see "**Accessing Sugar and Setting Your User Preferences"**.

Upgrading Sugar

This section describes how to upgrade Sugar Enterprise, Sugar Professional, Sugar Community Edition, and Sugar Express using the Upgrade Wizard or the Silent Upgrader.

You can upgrade from Sugar versions 5.5.0, 5.5.1, 5.5.2, and 5.5.3 to Sugar 6.0.0. Upgrading from 5.5.1, 5.5.2, and 5.5.3 will all use the same upgrade package. All Sugar 5.5.x plug-ins and extensions are compatible with Sugar 6.0.0.

In order to upgrade your Sugar application, you need to download the appropriate Upgrade.zip file from the Sugar website to your local machine. For example, to upgrade Sugar Professional from 5.5.0 to 6.0.0, you will need the *SugarPro-Upgrade-5.5.0-to-6.0.0.zip* file.

For Sugar Enterprise, Sugar Professional, and Sugar Express you can obtain the Upgrade zip file from the Sugar Support Portal at https://www.sugarcrm.com/crm/support and upload it to your local machine. For Sugar Community Edition, you can upload the Upgrade zip file to your local machine from the SugarCRM website.

To use the Upgrade Wizard, you need to log into the Sugar application. To use the Silent Upgrader, you need to run a PHP script from the command line on the server where the Sugar instance is installed.

CAUTION: It is strongly recommended that you run the upgrade process on a copy of your production system.

Upgrade Impact on Sugar Customizations

Upgrading to Sugar 6.0.0 will impact existing customizations as follows:

- Customizations made in Studio and Module Builder are preserved.
- Code customizations in Sugar Dashlets are preserved. For existing out-of-the-box Sugar dashlets, the upgrade replaces existing Search and List definitions with the default out-of-the-box definitions in 6.0. This may alter previous layouts and functionality.
- Customized page layouts will change as follows:
  - The Date Created and Date Modified fields will be added to Edit View and Detail View layouts of Accounts, Contacts, Leads, Opportunities, Calls, Meetings, Notes, Cases, Bugs, Contracts, Campaigns, and Targets.
  - The Picture field will be added to the Edit View and Detail View layouts of Users, Employees, and Contacts.
  - The Website field will be added to the Edit View and Detail View layouts of Leads.

  If you do not want these fields in your customized layouts, the system administrator can remove them.
- Code-customized Lead Conversion pages are preserved if they are located in the custom/directory. If the customized pages are in the main module folder, then they are ignored and the new default Lead Conversion pages will be used.

- Features that have been removed in 6.0.0 such as grouped modules will not display after the upgrade. For a complete list of changes, see "**What's New in 6.0.0**" in the Preface, and the Release Notes.

Compatibility Matrix for Upgrade

PHP version	5.2.1-5.2.6, 5.2.8-5.2.12, 5.2.13, 5.3.0 - 5.3.2
Databases	MySQL - 5.0x, 5.1 MSSQL - 2005, 2008 Oracle - 9i, 10g (Oracle is supported only for Sugar Enterprise)
Operating systems	Windows: XP, 2003, 2008, Vista Linux: Red Hat 4.x, 5.x (Advanced Server, Enterprise Server); Oracle Enterprise Linux 5.1; CentOS 4.x, 5.x Mac: OS X

Upgrade Prerequisites

- Backup your current Sugar directory and database before beginning the upgrade process.
- If op-code caching is enabled in the PHP configuration file, you will need to disable it before upgrading your Sugar installation. You can enable it after the upgrade process is complete.
- If you are using Zend Core 2.0, you will need to increase the default value of the parameters listed below before you begin the upgrade process:
  - Navigate to *C:\Program Files\Zend\Core\etc\fastcgi.conf* and increase the default value for `ConnectionTimeout` to 3000 seconds and `RequestTimeout` to 6000 seconds.
  - Navigate to the *php.ini* file and increase the default value of `max_execution_time` to 6000 seconds.
- Because the upgrade files are large, do the following:
  - In the Advanced section of the System Settings page of your current Sugar installation, modify and save the value of Maximum upload size to 21000000 (20MB).
  - Navigate to the *php.ini* file on your Web Server and configure the parameters listed below as follows:
    - Set `post_max_size` to at least 60MB.
    - Set `upload_max_filesize` settings to at least 60MB.
    - Set `max_input_time` to a large number.
    - Set `memory_limit` to 256MB.
  Restart the Web Server and then begin the upgrade process.

- If you are using an Apache Web Server and if you have set *LimitRequestBody* in the *httpd.conf* file, then ensure that you set it to a large number or use the default value of 2GB. Restart Apache and then begin the upgrade process.

- Ensure that the *Webserver user* has Write permissions to the Sugar database. The upgrade to Sugar 6.0.0 will add and replace files in several locations including the Sugar root directory. The *Webserver user* must have Write permissions for the root folder and all sub-directories during the upgrade process.

- The process of upgrading can take up to 30 minutes. If you are using the IIS Web server, ensure that the CGI application does not time out. To do this, on IIS, set the CGI script timeout to more than 300 seconds, which is the default value.

- If you have customized any module's PHP file, for example, accounts.php, it is strongly recommended that you save it in the Customs directory and not within the main module. This is because, during upgrade, existing customizations may be overridden by changes in Sugar 6.0.0.

Upgrade Considerations

The Dynamic Teams feature requires some database schema changes across all modules as part of the upgrade process. For larger databases, this operation can take some time to complete. We recommend taking the following measures to ensure a smooth upgrade process:

1. Test your upgrade on a development instance instead of the production instance.

2. If your database contains more than 10000 records per table, use the Silent Upgrade method through the command line interface to conduct the upgrade instead of the Upgrade Wizard inside the application.

3. After the upgrade is complete, log into the application as an Administrator and use the "**Repair**"option to repair and rebuild the database.

Using the Upgrade Wizard

The Upgrade Wizard provides a quick way to upgrade to the latest version of the Sugar application. The Upgrade Wizard includes critical upgrade logic as well as the SQL commands needed to upgrade the application.

Before using the Upgrade Wizard, ensure that the *config.php* file for your installation, located in the Sugar root directory, is writable.

> **Note:** Attempting to manually upgrade by simply replacing files and running the upgrade SQL is not supported.

To upgrade Sugar using the Upgrade Wizard

1. Download the appropriate Sugar Upgrade zip file from the Sugar Website to your local machine. For example, to upgrade Sugar Professional from version 5.5.0 to 6.0.0, download the *SugarPro-Upgrade-5.5.0-to-6.0.0.zip* file. To convert to Sugar Professional or Sugar Enterprise, download the appropriate conversion file.

2. Log into your existing Sugar application as the administrator and click **admin** on the right-hand corner of the page.

3. In the Systems panel of the Administration Home page, click **Upgrade Wizard**.

   The Upgrade Wizard screen displays on the page.

4. Click **Next**.

   The System Checks page displays on the screen, and Sugar begins the system check process. If the process completes successfully, the page indicates that there were no issues. If not, any issues with file permissions, database, and server settings are listed on the page.

5. If the system check is successful, click **Next**.

   The Upload an Upgrade screen displays on the page.

6. Click **Browse,** and navigate to the location of the upgrade zip file to select it.

   The path to the file displays in the Upload an upgrade field.

7. Click **Upload Upgrade** to upload the package to the Sugar application.

   The system uploads the package and displays it on the page. The page also displays a Delete Package button that you can use to remove the package if necessary.

8. Click **Next**.

   The Preflight Check screen displays on the page.

   You can view differences in the Sugar databases schema between your current Sugar version and the new Sugar version when you click **Show Schema Change Script**.

   By default, the Upgrade Wizard Runs SQL option is selected as the database update method. If you ran the SQL queries manually, select **Manual SQL Queries** from the Database Update Method drop-down list and select the **Check when SQL has been manually run** box.

9. To run Preflight Check again, click **Recheck**; if not click **Next**.

   The Commit Upgrade screen displays on the page.

   Optionally, you can click **Show** to see a list of files that were copied and the rebuilt results. You can also view skipped queries.

10. Click **Next**.

    The Debrief screen confirms that the upgrade has been installed. If you had chosen to manually merge files or run SQL queries, you will need to complete those steps now.

11. Click **Done**.

    The upgrade is now complete, and the Home page displays on the screen.

12. In the Systems panel of the Administration Home page, click **Repair** and select the Rebuild Relationships and Rebuild Extensions options to perform these actions.

    For more information, see "**Repair**".

13. If you unchecked any files to prevent the Upgrade Wizard from overwriting them, then manually merge the files by extracting the skipped file from the patch zip file. Merge the file that was installed in the Sugar application directory.

> **Note:** If your attempt to upgrade Sugar is unsuccessful, check the *upgradeWizard.log* file in the Sugar folder for information.

Locking Down the Upgrade Wizard

If you are managing multiple instances of the Sugar application and you want to maintain complete control over the Sugar instances, you can lock down the Upgrade Wizard to ensure that no user with administrative privileges can upgrade any of them. To lock down functions on the Administration page

1. Navigate to the *config.php* file in the Sugar root directory.
2. Set the following parameter to `true` as below:

   `$sugar_config['admin_access_control']=true`
3. Save the file.

Converting Sugar Editions

You can convert from one Sugar edition to another using the Upgrade Wizard. The table below lists the supported conversions.

Sugar Flavor	Supported Conversion
Sugar Community Edition, versions 5.5.x	Sugar Enterprise 6.0.0
	Sugar Professional 6.0.0
Sugar Express, versions 5.5.x	Sugar Enterprise 6.0.0
	Sugar Professional 6.0.0
Sugar Professional 5.5.x	Sugar Enterprise 6.0.0

You will need to obtain the Sugar license key from your sales representative for the Sugar edition you want.

Conversions are a two-step process. First you must upgrade your existing Sugar application from the current version to 6.0.0. You can then convert to the desired Sugar edition using the appropriate conversion zip file.

For example, to move from Sugar Community Edition 5.5.1 to Sugar Enterprise 6.0.0, you must first convert to Community Edition 6.0.0 using the *SugarCE-Upgrade-5.5.1-to-6.0.0.zip* file. You can then convert from Community Edition 6.0.0 to Enterprise 6.0.0 using the *SugarCE-to-SugarEnt-Conversion-6.0.0.zip* file.

Using the Sugar Silent Upgrader

The Silent Upgrader enables you to avoid some of the limitations that the Web application environment may have that prevents the Upgrade Wizard from completing the upgrade. The upload size limit (by PHP and sometimes even by Web server), the CGI (or equivalent) timeout limit, and the MySQL (or equivalent) session timeout limit are some of the challenges people run into when upgrading Sugar. The Silent

Upgrader either avoids the limitations or better controls the settings in its stand-alone execution environment.

Note: The *silentUpgrade.php* script creates new files for the user who is running it. For example, for the root user it create files as user/group root. Because Apache cannot read this, you must ensure that the Web server user has the permissions to read and write the script.

To upgrade Sugar using the Silent Upgrader

1. From the command line on the server where the Sugar instance is installed, execute the *silentupgrade.php* script as follows:

   ```
   php.exe -f silentUpgrade.php [upgradeZipFile] [logFile]
   [pathToSugarInstance] [adminUser]
   ```

   where:

   upgradeZipFile is the full path to the upgrade zip file. For example, SugarCE-Upgrade-5.5.0-to-6.0.0.zip

   logFile is the full path to the log file.

   pathToSugarInstance is the full path to the instance being upgraded.

   adminUser is a valid admin user name.

2. After upgrading, log into the Sugar application as the administrator and rebuild relationships and extensions using the Repair option in the Systems sub-panel.

Uninstalling a Sugar Instance

If you need to uninstall your Sugar instance, navigate to the location where Sugar is installed on your machine, and delete the Sugar root directory. Then delete the Sugar database schema from MySQL, MS SQL server, or Oracle database, as appropriate.

Getting Started

This guide assumes that the resources needed to access the Sugar system are available to you and that you are familiar with how to use them. If you are not sure whether your system meets requirements or how to use required third-party tools, such as a Web browser, talk to your manager or system administrator.

Topics include:

- **Technical Requirements**
- **Accessing Sugar and Setting Your User Preferences**
- **Managing Your Password**
- **Security Timeout**
- **Using Sugar Offline Client**

Technical Requirements

Before you begin using the system, ensure that you have the following software installed and configured on your system:

1. A current Web browser on your computer.

   Sugar has been successfully tested on the following browsers.

Web Browser	Version	URL
Firefox	2.0 and higher	www.mozilla.org/firefox
Safari	4.0	http://www.apple.com/safari/

2. JavaScript and cookie support enabled on the Web browser.

   Both JavaScript and cookie support must be enabled in the security settings of your browser, and are usually turned on by default. Check your browser configuration to ensure both JavaScript support and cookie support are enabled as follows:

   o Firefox: Navigate to *Tools > Options > Privacy* and *Web Features*.

   o Safari. Navigate to *Safari > Preferences > Security.*

3. 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 the Compatibility Matrix in the Release Notes.

Web Browser Window Controls

Sugar dynamically generates the HTML screens that the Web browser displays when you click certain buttons on a Web page. These screens may not display if you use the Web browser's Backward and Forward buttons. Therefore, it is recommended that you use the Actions list or the module tabs 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

You access Sugar through a Web browser. The system administrator assigns your user name and provides a temporary system-generated password. After you log into Sugar with this password, you will need to create a new password on your User Settings page.

Troubleshooting Tips

If you cannot log into Sugar, do the following:

- Verify that the user name and password are correct, including any capital letters.
- Verify with your system administrator that you have the correct user name and password.
- Contact your system administrator to ensure that your account has not been disabled.

The Forgot Password? link displays in the Login window if the Administrator has enabled this feature. If you forget your password, click this link, enter your user name and password in the fields that display below, and click **Submit**. Sugar will send you a link to the page where you can reset your password. If this link is not available to you, contact the administrator for a new password.

For information on using the Admin Wizard that displays when you log in as an administrator, see "**Configuring Settings in Sugar**".

To configure your user settings

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

2. Enter your user name and password.

3. Click **Login**.

   If you are a regular user, the User Wizard displays on the screen. This wizard guides you through the process of entering your Profile information and Locale settings in Sugar. If the administrator has already configured these settings for you, you can change them in the Wizard if necessary. You can also change them from the User Settings page after you log into Sugar.

Additionally, the administrator also configures a default SMTP email server to send out email notifications and alerts. If the administrator has enabled users to use this email server for outgoing emails, you will see an Email Settings tab in the Wizard. You can specify your user name and password to send out emails using that email server.

For a description of User settings, see "**Editing Your User Settings"**below.

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

Sugar displays the Home page on the screen. You can now begin using the Sugar application.

User Session Rules

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

- You cannot log into a Sugar instance simultaneously 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 user logs into Sugar 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.

You can, however, do the following:

- When logged into Sugar through a browser, you can also concurrently log into Sugar through the Sugar Plug-in for Outlook (or other plug-ins and extensions using the Web service APIs).

- You can open a unlimited number of pages of a Sugar instance within a single browser.

Editing Your User Settings

When you log into Sugar, your name displays at the top right of the screen. You can click it to view or edit your default user settings. You can also view the list of modules you are allowed to access, and your access level 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 log in. However, you cannot change your level of access to modules, or view modules that you are not allowed to access.

The default language pack that Sugar uses is the US English language pack. If the System Administrator has installed other language packs, you can change to a different language. Language packs change the language on the Sugar User Interface but not the data.

Language packs can be found at http://www.sugarforge.org/.

User Profile

This tab displays your profile information such as your full name, your Sugar user name, phone number, address, title, and email address. It also displays the teams to which you belong. When you go on vacation, you can enter the dates on this page in the User Holidays section.

Employee Information

This information, entered by the administrator, 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 may have set up one or more email addresses for your mail accounts and may have specified your primary email address for your automated response to emails. You can edit this information as described in "**To change your email settings**".

If the administrator has set up an SMTP server and has enabled you to use the associated mail account to send out emails, you can do so automatically. If the administrator has not enabled you to use the mail account, you will see fields for the SMTP user name and password. Enter the user name and password for your mail account to send out emails using this SMTP server. Alternatively, you can specify another SMTP server from the Emails module as described in **"Configuring Email Settings"**

My Teams

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

User Holidays

Use this panel to enter and track your vacation time.

Password

Use this tab to change your password as described in **"Managing Your Password"**.

Advanced

This 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. From the drop-down list, select a character set to use to export and import data and in Vcard generation.

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. However, you can override the administrator's settings with your own. The default character set to export data is UTF-8. If

your locale is not US or Western Europe, you must specify the appropriate character encoding for your locale. 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. So, users in this locale will 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 Name. Select this option to display your full name in Sugar Feed and User Feed entries as well as 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 get 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
>
> Quotes
>
> Knowledge Base
>
> Campaigns
>
> Projects

Reminders. From the drop-down list, select a default time interval as a reminder for calls and meetings.

Mail Merge. If you are using Sugar Plug-in for Word, you can enable this option to merge data such as names and addresses from Sugar with form letter templates created in Word. The System Administrator must also enable this option in order to enable users to use it.

Default Teams. Click **Select** to choose a team as your primary team. You can be a member of multiple teams. To specify a secondary team, click **Add** to add a new field and then click **Select** to choose the team.

No Opportunities. Select this option if you are not involved in sales activities, and therefore, do not need to be assigned opportunities.

If you are an administrator, you can also assign yourself to the role of a Group User or Portal API User through the User Management option on the Administration Home page.

Layout Options

In this section, you can change the default settings for the following:

Edit Tabs. You can hide modules that you do not need to use. To hide a module, move the module tab to the Hide Tabs list using the right arrow. Similarly, to display a module, use the left arrow to move it from the Hide Tabs list to the Display Tabs list. If you log in as the administrator, you can apply these settings globally from the Administration Home page.

You can also change the order in which module tab display in Sugar. To move up a module, select the module in the Display Tabs list and click the Up arrow; click the Down arrow to move down the module.

Note: You cannot hide the Home module.

o **Number of tabs**. You can 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.

o **Number of subtabs**. You can enter a value to specify the number of subtabs to display per tab before an overflow menu appears.

o **Subpanel Tabs**. You can enable this option to group subpanels into tabs in the Detail View of records.

o **Subpanel Links**. You can enable this option to display a row of shortcut links for subpanels.

Locale Settings

In this section, you can change the default settings for the following:

Date Format. From the drop-down list, select a date format for time stamps. The default is mm/dd/yyyy.

Time Format. From the drop-down list, select a time format for time stamps. The default is in hours.

Time Zone. Set your time zone.

Name Display Format. Specify how names will be displayed in records. The default is Salutation, first name, and last name (SFL).

Currency. From the drop-down list, select the currency to use in records. The default is the US Dollar.

Currency Significant Digits. From the drop-down list, select the number of digits that display after a decimal.

Decimal Symbol. Specify the decimal symbol to use. The default is a period (.).

PDF Settings

In this section, you can change the default font settings to print PDFs of reports, quotes, and projects.

Font for Header and Body. From the drop-down list, select a font for the header and body of PDF documents.

Main Font Size. Enter a number to specify the font size in the PDF header.

Font for Footer. From the drop-down list, select a font for the footer in PDF documents.

Data Font Size. Enter a number to change the default font size of the PDF body.

Calendar Options

Publish Key. You can enter a key number to publish free/busy information from an external calendar application, such as Microsoft Outlook. You can provide this key to users of other calendar applications if they want to view your calendar. Sugar restricts access to your calendar to individuals who can provide this key.

Access

This tab displays the access permissions that the administrator has granted you for a module 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. To download a plug-in to your local machine, click the appropriate link. You can then install it on your machine.

If you want to revert to your default settings after saving any changes that you made, click **Reset User Preferences** and click **OK** to confirm your action.

Similarly, if you customize your Home Page or Dashboard, you can restore the default settings by clicking the Reset Homepage and Reset Dashboard respectively.

Editing Email Settings

You can view and edit your default email address. Additionally, if the administrator has enabled users to use the default SMTP email server for outbound emails, you can use that email server to send out emails from Sugar.

To change your email settings

1. Click your name, which displays at the top right of the Sugar screen, to view your User settings.

2. On the User Profile tab, scroll down to the Email Settings section.

3. To change an existing email address, enter the new address in the field. To add another email address, click **Add** and enter the email address in the new field that displays below.

   You can add multiple email addresses. The first email address that you enter is selected as the primary email address, by default. To select a different email address, click the **Primary** button corresponding to the email address that you want to specify as the new primary address.

To specify a different email address for automated responses to emails, select the **Reply-to** radio button corresponding to the email address that you want to specify as the new reply-to address.

4. From the Email client drop-down list, select the email client of your choice. 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**. If you selected External Email Client, this field displays the email server address.

6. If you selected Sugar Email Client, you can use the administrator-configured SMTP server to send out emails. Enter the SMTP user name and password for your email account.

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

When the administrator initially grants you access to Sugar, you will be provided with a temporary password. You will need to 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 periodically change your password.

To change the password

1. Log into Sugar and click your name, which displays at the top right of your screen to view your User settings.

2. Click **Edit.**

3. Click the **Change 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.

4. In the Current Password field, enter your current password.

5. In the New Password field, enter your new password.

6. In Confirm Password field, enter your new password again.

7. Click **Save** to change the password.

Resetting a Forgotten Password

If the administrator has enabled the Forgotten Password feature, you will see a "Forgot Password" link in the Login window. If you forget your password, click this

link to submit your request for a new password. The system displays a message confirming that your request has been submitted. Sugar will send you an email with a link to access the Password Reset page. This page displays any password rules in effect along with fields to enter user name and password. Create a new password that meets the required rules and confirm it. You can then log into Sugar with the new password.

If you do not see the Forgot Password link in the Login window, contact your system administrator for a new temporary password. You can then log into the system, and change your password.

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).

Therefore, if you do not perform any tasks for a certain time period, the system logs you out either because the browser session timed out or because PHP session timed out.

When you are ready to resume working with the system, click any button on the screen. The system automatically loads the Login page for you. You can also close the Web browser windows and re-load the Login page manually in a new browser window.

Using Sugar Offline Client

You have the option of working offline if necessary. When working offline, your machine is not connected to the server. Therefore, the dates on your machine and the server may differ. Hence, you will need to periodically synchronize the data on your computer with the data on the server.

The administrator must perform additional tasks on a one-time basis 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 make the decision on which records should be overwritten.

To synchronize data

1. If you are not connected to a server that is running Sugar, launch the Sugar application on your computer.

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

   To perform the initial synchronization, select only the **Clean Sync** checkbox. 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.

   When you click **Start Sync**, the information transfer process displays in a progress bar.

3. If you are connected to the server but working in the disconnected mode, click the **Sync** link and select **Go Online**.

   This redirects your browser to the server URL. To work offline again, close your browser and open a new browser to your local URL.

For more information on using the Offline Client, see the *Sugar Offline Client Installation Guide.*

Navigating the User Interface

This chapter describes the layout of the Sugar user interface and presents an overview of the functionality.

Topics are as follows:

- **Overview of the Sugar User Interface**
- **Viewing and Managing Record Information**
- **Integrating Data from External Sources**
- **Managing Sugar Dashlets**
- **Merging Duplicate Records**
- **Searching for Information in Sugar**

Overview of the Sugar User Interface

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.

Record types can be related 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 screen. Tabs for other modules display alongside the Home tab. You can click a tab to open the module to view, create, and manage records.

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 screen in the Sugar application:

- **Shortcut Bar**. This static bar, located at the 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 provide the ability to create a record from anywhere within 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.

- **Global Search field**. This field, located in the Shortcut Bar, allows 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 the page, are common to all modules. These include your name, Logout, Employees, Support, and About. When an administrator logs in, the Admin link is also visible. When you click the left arrow located next to the Logout option, the slider bar hides most of these 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 User settings. These settings include your profile information, layout options, and so on. For more information, see "**Editing Your User Settings"**.

  - **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 log in 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.

  - **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 importing records. Place the cursor on 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. 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 the relevant data and activities that you select for display. For more information, see "**Home Module"**.

- **Accounts**. Click this tab to view the Accounts module. Use this module to manage your customers. You can track a variety of information about an account including website URL, address, number of employees and other data. Business subsidiaries can be linked to parent businesses in order to show relationships between accounts. For more information, 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**".

- **Activities**. Click this tab to view the Activities module. Use this module to create or update scheduled activities, or to search for existing activities. For more information, see "**Activities Module**"

  Activities consist of the following sub-modules:

  - **Calendar**. 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.

  - **Calls.** Manage outbound and incoming phone calls between you and your customers.

  - **Meetings.** Manage meetings, including both internal and external invitees, that you schedule or accept.

  - **Tasks**. Manage a list of actions that you need to complete by a specific date.

  - **Notes.** Manage notes and file attachments.

- **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. Leads can be fed into the Sugar system automatically from your website. For more information, see "**Leads Module**".

- **Emails**. Click this tab to view the Emails module. Use this module to send, and receive emails. You can also automate email management, create email templates for automated responses, and for email-based marketing campaigns. For more information, see "**Emails Module**".

- **Campaigns**. Click this tab to view the Campaigns module. Use this module to create and manage marketing campaigns. You can implement and track marketing campaigns. These can be telemarketing, mail or email-based 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**. Use this module to track and manage tasks for multiple projects. Tasks can be assigned to different users and assigned estimated hours of effort. As tasks are in progress or completed, users can update the information. 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**. 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, its resolution, the user assigned, the release of software involved, its 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 contacts and related documents. 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**".

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, in a table format, links to individual records. The list view also displays, in columns, other relevant information such as names, Email addresses, phone numbers, and account names for each record. You can click a record name to view the details in the Detail View. 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 record name, displays options to perform actions such as emailing individuals or adding them to a campaign target lists; other options include updating, exporting, merging, and deleting records.

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"**.

The system paginates long lists. To sort the list, click any column title that has a double-arrow icon beside it; to reverse the sort order, click the column title again.

Detail View: The Detail View displays the 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 lists sub-panels for related activities, opportunities, and so on. The Detail View provides options to edit, delete, and duplicate the record. You can also create, edit, and delete related records in the sub-panels.

Edit View: The Edit View allows you to revise existing information and add more details to a record.

To view and edit record information

1. From a module's List View, click a record name to see its Detail View.

   Alternatively, place the cursor on the Information icon located at the end of the record row, and click the View icon in the Additional Details popup window.

   The Detail View displays related information in sub-panels. For example, an account's Detail View displays sub-panels for related activities, quotes, opportunities and so on. Each sub-panel consists of rows to list links to multiple records. You can add more records to the list, if necessary

2. To edit a related record, click the corresponding **Edit** icon.

3. Make the necessary changes and click **Save**. To exit the Edit View without saving your changes, click **Cancel**.

To manage related information in sub-panels

- To minimize a sub-panel, click the arrow icon that is located next to its name. The sub-panel records no longer display but the sub-panel name and the arrow icon are still visible; to display the sub-panel, click the arrow icon again.

- To move a sub-panel to a different location on the page, place the cursor on the arrow icon, hold down the cursor, drag the panel to the new location and release the cursor.

- To create a new record, click **Create** above the sub-panel; 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 remove a related record, click the **rem** icon corresponding to the record, and click **OK** to confirm your action.

   The system adds the records in the sub-panel. This feature enables you to quickly associate multiple records; for example, you can associate more than one contact with an account.

Tracking User Activity

The Last Viewed list displays your recently accessed records. 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 to access it. 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.

The List View on a module's Home page displays existing records. You can view this list 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 team assigned to manage it. You can change the user and team assignments if you need to do so. While assigning a user to the record is optional, assigning a team is a requirement. The assigned user need not 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 will depend on the permissions granted to them by the administrator.

When a record is assigned to a user, Sugar sends out an email notifying the user. Users can view the assigned user for records from the Detail View and Edit View.

Sugar provides the following teams for your use:

Private: All users have their own private team in Sugar. By default, records that you create is assigned to your private team to allow you to access and manage them.

Global: This is a universal team consisting of all Sugar users. Therefore, 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. Sugar provides two regular location-based teams, East and West, for your use. The administrator creates and manages regular teams.

Team Types

To allow users who are spread across teams to perform record-related tasks, you can assign multiple teams to the record. When you assign a record to more than one team, the first team you select is the primary team by default. However, you can 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. You can point the cursor on the arrow to view secondary teams assigned to the record.

If the administrator has included Team as one of the search fields, you can search for records using team names.

To assign users and teams to records

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

2. On the module's tab, select **Create** from the Actions list. For example, to create a record in the Accounts module, choose **Create Accounts**.

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 assigned user, click the record name in the List View to view the record details.

2. In the Detail View, click **Edit**.

3. The Edit View displays on the screen.

   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 the 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 page of every record displays a History sub-panel that enables you to track record-related activities such as meetings, notes, and 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 add a note or to attach a file, click Create Note or Attachment. For more information, see "**Creating Notes and Attachments**".

3. To archive an email, click **Archive Email**, copy the email's contents into the Email form, and save it.

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

5. 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 user and 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:

   o To select a new primary team from the teams you added, click the **Primary** radio button corresponding to the team name.

   o 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.

   o 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.

   o 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 systems and data sources using Sugar Cloud Connectors.

Typically, you use the import functionality to add a large volume of data from an external system. However, you can also use Sugar Cloud 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. Sugar provides connector s to Hoovers, Zoominfo-Person, Zoominfo-Company, and LinkedIn.

To integrate data through a Cloud 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. 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 of the data available to view and merge for the selected data source record. Additional data from the data source record may be available within 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

Data Source	Data List View Fields	Additional Details Pop-up/Data Merge Form Fields
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.

Managing Sugar Dashlets

Sugar Dashlets are user-configurable panels that allow you to customize your Home page to view information of your choice. You can add and remove Sugar Dashlets as needed.

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 Sugar Feeds and Team Notices. You can filter records based on criteria such as date, status, and subject, and specify the fields you want to view.

Sugar Feeds enable 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 "**Sugar Feed and User Feed"**.

Team Notices display announcements targeted towards the team to which you belong. Only users with administrator privileges can set up these announcements.

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 10 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: If you cannot add or move Sugar Dashlets, check with the administrator to ensure that the functionality has been enabled.

Developers can extend the functionality of Sugar Dashlets to provide users with additional capabilities.

To add Sugar Dashlets

1. On your Home page, click **Add Sugar Dashlets**.

   The Add menu displays 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.

3. To add a chart Sugar Dashlet, select the chart from the Charts tab.

   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. Your custom report charts are listed under My Saved Reports as well as charts of summation reports. You can also add your team report charts as well as Global Team report charts.

4. To add a Team Notice, Jot Pad, or Sugar Feed, select it from the Tools tab.

5. To add an external Website or a News feed, enter the URL in the appropriate field on the Web tab and click **Add**.

   Your Home page displays the Sugar Dashlet.

To rearrange and edit Sugar Dashlets

1. To rearrange the position of a Sugar Dashlet on the Home page, point the cursor at its title, drag it to the new position and release.

2. To edit a Sugar Dashlet, point your cursor at its title bar, and click the **Edit** icon.

   The Properties dialog box displays in a separate window. You can specify the title, the number of rows to display, and the columns to display. You can also filter records based on date, assigned user, and so on.

3. Click **Save** after you have made the desired changes.

To manage Sugar Dashlets

1. To move a Sugar Dashlet, place the cursor on its title, press and hold down the mouse button and move it to the new location, and then release the mouse.

2. To remove a Sugar Dashlet, point your cursor at its title bar, and click the **Delete** icon. When the system displays a message seeking confirmation, click **OK** to confirm its removal.

3. To refresh a Sugar Dashlet, point your cursor at its title bar, and click the **Refresh** icon.

Sugar Feed and User Feed

The Sugar Feed 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.

Additionally, the User Feed enables you to post your status along with external links, images, and YouTube videos.

Note: If you select the Show Full Name option in your User settings, your full name will display in Sugar Feed and User Feed entries.

To add a Sugar Feed or a User Feed Dashlet

1. Click **Add Sugar Dashlet** on your Home page.

2. In the **Add** window, select **My Sugar Feed** from the Tools tab.

   The My Sugar Feed dashlet displays on the selected tab of your Home page.

   If the User Feed is enabled, you will see your username and a field to enter the status information to post

3. Click the down-arrow next to your name in the My Sugar Feed bar.

4. Enter the team's name in the **Send To Team** field, or click **Select** to select it from the Teams list.

5. To post an external link, image, or YouTube video, in the My Sugar Feed dashlet, and select Link, YouTube, or Image respectively; enter the URL or path in the field next to it.

6. Click **Post**.

The posted link, image, or video in the Sugar Feed dashlet. When you perform an action such as creating a contact or converting a lead, the information automatically displays in the Sugar Feed dashlet.

Merging Duplicate Records

You can merge duplicate records into a single record to update and clean up 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 duplicate 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. On the module's home page, select two or more duplicate records and click the **Merge Duplicates** link. Alternatively, on the detail page of a record, click **Find Duplicates**.

   The Merge Records page displays fields from primary record on the left and fields from the duplicate records on the right. The system highlights primary record fields that have different values from the duplicate records.

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

   The system uses a line to demarcate fields that have different data from the fields that have identical data. Fields that have differing data display above the line.

   a. To specify one of the duplicate records as the primary record, click **Set as Primary** above the duplicate field.

      The system moves that record to the left.

   b. To replace a field in the primary record with a field from a secondary record, use the << button.

2. Click **Save Merge**.

   The system 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**.

The first step of finding duplicates display on the screen. You will have to set filters 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.

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

   The search results display all the records that contain duplicate information for the specified field.

   To view the details of a record, click its name in the search results.

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

   The Merge Records page displays on the screen.

5. 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. You can also perform a quick search for a specific field value.

You can perform the following types of searches in Sugar:

- Global Search
- Basic Search
- Advanced Search

Global Search

You can perform a global keyword search at the system level for text that matches the beginning of key field names. The system searches Accounts, Contacts, Leads, Opportunities, Quotes, and Cases and displays search results for each of these modules in separate sub-panels.

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". Depending on your database configuration, global search may or may not be case-sensitive. 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.

To perform a global search, enter a letter or a keyword in the Search field and press Enter or click the adjacent Search icon.

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.

To view the full search results from each module in separate panels, click the Show All link that displays at the bottom of the Search result list.

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**.

- Click **Clear** to clear the search filters.

You can edit or delete records in the search results as described in **"To edit or delete multiple records"**.

Advanced Search

To further filter the search results, click **Advanced Search**. The fields available for Advanced Search vary depending on the selected module.

The search fields are context-sensitive and vary depending upon the module you are searching. 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.

Text entered in search fields needs to match from the beginning of the value stored in each record unless the wildcard character is prepended. If text is entered in more than one search field, then only records that match the selected fields are included in the filtered list. In other words, searching for "fred*" would only match first names like "Fred*erick" or other "Fred" names containing the asterisk (*) character.

Note: Numeric search strings will match anywhere in a field. Then 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

You can use the Saved Search and Layout option to specify information that you want to find as well as 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, and 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**.

   The name now displays in the Saved Searches drop-down list.

2. To view a saved search, select it from the Saved Searches drop-down list from the module's home page.

   The system displays the results below.

3. To modify a saved search, select the saved search from the drop-down list, change the criteria as needed in the fields above, and click **Update**.

4. To delete a saved search, select it in the Saved Searches drop-down list, click **Delete,** and then click **OK** to confirm the deletion.

5. To add a column to List View, select it from the Hide Columns list and use the left arrow to move it to the Display Columns list.

6. To remove a column from List View, select it from the Display Columns list and use the right arrow to move it to the Hide Columns list.

7. To edit or delete multiple records in the search results, use the Mass Update sub-panel as described in **"To edit or delete multiple records"**.

Home Module

When you log into Sugar, you will see your Home page. Tabs for other modules display alongside the Home tab.

The Home page displays a collection of Sugar Dashlets that display information pertaining 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**".

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 10 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 Sugar Feed**. Notifies you when other team members create a new contact, lead, opportunity, or case.
  - **My Emails**. Lists your unread emails that were imported into Sugar from external mail accounts.
- **Sales**: This tab displays pre-defined sales report charts. For example, My Pipeline displays a chart of your sales opportunities based on the cumulative amounts for selected sales stages. This chart, based on a Sugar predefined report, displays only when the expected close date is within the specified date range. Click the **Edit** icon to modify a sales stage or the time period. The updated information is reflected in the pipeline chart. To refresh the view after an update, click the **Refresh** icon.

- **Marketing**: This tab displays pre-defined marketing report charts. For example, Lead by Lead Source displays the 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 and predefined reports on your Home page.

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. To refresh the view after an update, click the **Refresh** icon. To recalculate the data source for a specific chart, click the associated **Refresh** icon above the chart.

You can view the following predefined charts from the 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 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 where 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.

In addition to some of the above mentioned charts such as My Forecasting, 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 according to your preference. You can rename page tabs, change the Home page layout, and add new Sugar Dashlets. For more information on adding Sugar Dashlets, see "**Managing Sugar Dashlets**".

If you need space to accommodate more Sugar Dashlets, you can add new pages to the Home page. These pages display as additional tabs next to My Sugar tab.

Note the following restrictions when adding new pages:

- You cannot add more than 10 pages to the Home module.

- You cannot have more than three columns on a page.

- You cannot have duplicated page names.

- Page names cannot be more than 25 characters long.

- You cannot delete the Home page but you can delete other pages that you create.

You can revert to the default Home page at any time. However, note that doing so will delete any pages that you added to the Home module.

To customize the Home module

1. To rearrange the dashlets, click the title bar of the dashlet to select it, then drag and drop it in a different location on the Home page.

2. To rename the My Sugar tab, do the following:

     a.   Double-click the tab name.

        The tab label turns into a text field where you can enter a new name for the tab.

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

3.   To add a Sugar Dashlet, click the Gear icon located at the far right on the My Sugar bar, and select **Add Sugar Dashlets**.

4.   To change the number of columns in the page layout:

     a.   Click the Gear icon located at the far right on the My Sugar bar and select **Change Layout**.

        The Change Layout window displays on the screen. The default is two columns on the page.

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

        The system reformats the page to display existing information within the number of specified columns.

To add and manage new pages

1.   Click the **Add Page** link located to the right of the home page tabs.

   The Add Page window displays on the screen.

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.

3.   Click the Down arrow on the new page to view options. You can rename the page, add Sugar Dashlets, and change page layout.

4.   To delete the page, click the Down arrow on the page tab, select Delete Page, and click **OK** to confirm the deletion.

To revert to default Home page settings

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

2.   On your User Settings page, click **Reset Homepage**, and click **OK** to confirm the action.

   Sugar resets your Home page.

Leads Module

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.

To import Leads, click **Import** in the Actions list. For more information on importing data, see "**Importing Data**".

To create a lead

1. In the Actions list, click **Create Leads**.

    Alternatively, click the New Lead icon in the Shortcuts Bar.

2. In the Leads Overview section, enter the following information:

    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 URL to the website of the individual's organization.

    Other Phone. Enter the lead's alternative phone number, if any.

    Email. Enter the lead's email address.

    Other Email. Enter the lead's alternative email address, if any.

Primary Address: Enter the primary address and Other Address information. 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 for you. However, 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. 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 the Add icon. You can add multiple email addresses.

Description: Enter a brief description for the lead.

In the More Information section, enter the following details:

Status. Select the status of the lead from the drop-down list. The status options are listed below. However, 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: Sugar requires the "Converted" status, and hence, it must not be removed.

- 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.

Campaign. To associate the lead with a campaign, enter the campaign name or click **Select** to select it from the Campaigns list.

Lead Source. From the drop-down list, select the origins of the lead such as Trade Show or Direct Mail.

Lead Source Description. Enter a brief description of the lead source.

Referred by. If someone referred the lead to you, enter the information in this field.

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.

In the Other section, specify the following information:

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 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** to save the new lead information; click **Cancel** to return to the Leads home page without saving the information.

After you save the lead, the lead's detail page displays on the screen. You can create activities and view past marketing activities, including a list of any campaigns that were sent out to the lead.

Managing Lead Information

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

To manage leads

- To search for a lead, use the Search sub-panel on the Leads Home page as described in "**Searching for Information in Sugar**".

- To add one or more leads to a campaign target list, select them in the List View and click **Add to Target List** to select the list from the Target Lists pop-up window.

- To import and export leads through vCards, follow the process described in "**Using vCards to Import and Export Contacts**".

- To pull in data from external data sources such as LinkedIn, select the data source from the lead's Detail View. For more information on data sources, see "**Integrating Data from External Sources**".

- To import records, click **Import** in the Actions list. For more information on importing data, see "**Importing Data**". You can also import leads as vCards just as you import contacts.

- To export records, select them from the list, click the **Export** link and follow the process described in "**Exporting Data**".

- To merge duplicates, click the **Merge Duplicates** link and follow the process described in "**Merging Duplicate Records**".

- To track changes to the lead information over time, click the **View Change Log** link.

- To edit or delete information some or all the leads, use the Mass Update panel as described in "**To edit or delete multiple records**".

- To view detail information, click on the lead name the list.

    o To edit information, on the detail page, click **Edit**.

    o To manage newsletter subscriptions, on the detail page, click **Manage Subscriptions**. To add the individual to a newsletter subscription mailing list, select the newsletter from the Available NewsLetters list and drag it to the

NewsLetters Subscribed To list. Similarly, to remove the individual from the mailing list of a newsletter, drag the newsletter from the Newsletters Subscribed to list to the Available Newsletters list. Click **Save** to update the information.

o To duplicate a lead, on the detail page, click **Duplicate**. Duplication is a convenient way of creating a similar lead. You can change the information in the duplicate record to create the new lead.

o To delete a lead, on the detail page, click **Delete**.

o To view and edit related information 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 the email content into the form and save it for your records.

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

After leads have been evaluated and qualified, you can convert them into contacts, opportunities, and accounts.

To convert a lead

1. On the Lead's Detail View, click **Convert Lead**.

    Sugar displays the Convert Lead page on the screen. Information such as name and address that you entered when creating the lead displays on this page. You can edit and add information as needed.

    The Create Account checkbox is selected 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. To associate the lead with an existing account, click the arrow and choose the account from the Accounts list.

3. To create a note, appointment, or opportunity, select the appropriate checkbox.

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

4. Enter the required information and click **Save**.

    Sugar 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.

Contacts Module

Use the Contacts module to create and manage contacts for your organization.

A contact is any individual who is a valid sales lead; that is, 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.

The Actions list 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 "**To import 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. In the Actions list, click **Create Contact**; alternatively, access the New Contact Quick Form from the Shortcuts Bar, and add additional information after you save the form.

2. In the Contacts Overview section, enter the following information:

   First Name. Enter the contact's first name.

   Last Name. Enter the contact's last name.

   Title. Enter the contact's business title.

   Picture. If you have downloaded the person's photo in .jpg or .png format on your local machine, click **Browse** to navigate to the location and upload the picture into the record.

   Office Phone. Enter the contact's work 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; alternatively, click **Select** to choose from the existing list of accounts.

Address: Enter the primary address and Other Address information. To copy the primary address into the Other Address section, select the **Copy address from left** box.

If you select a contact from the Contact's list, the system automatically enters the address for you. However, you can edit this information if needed. Similarly, if the contact is related to an account, Sugar automatically auto-fills this field with the account's primary address.

Email Address: Enter an email address 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 additional email addresses, click the **Add** icon.

Description: Enter a brief description for the contact.

In the More Information section, enter the following details:

Reports To. Click **Select** and select the contact's supervisor from the Contacts list.

Lead Source. From the drop-down list, select the source that generated the lead, such as direct mail or trade show.

Campaign. To associate the contact with a campaign, enter the campaign name or click **Select** to select it from the Campaigns list.

Sync to Outlook. If you have installed Sugar Plug-in for Microsoft Outlook, select this box to synchronize this contact information with 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.

In the Other section, specify the following information:

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**".

Assigned to. Select the individual who is responsible for communicating with this contact. By default, you are assigned to the contact.

Portal Information: These fields display on this page when 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 delete one or more of the listed contacts, use the Mass Update panel as described in "**Editing and Deleting Multiple Records**".

- To add one or more contacts to a campaign target list, select them in the 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.

- To edit contact information, in the Detail View, click **Edit**.

- 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 the email contents into this form and 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, click **Import** in the Actions list of the Contacts Home page. For more information on importing data, see "**Importing Data**".

- To export records, select them from the list, click the **Export** link and follow the process described in "**Exporting Data**".

- To merge duplicates, click the **Merge Duplicates** link and following the process described in "**Merging Duplicate Records**".

- To manage newsletter subscriptions, on the detail page, click **Manage Subscriptions**. To add the individual to a newsletter subscription mailing list, select the newsletter from the Available NewsLetters list and drag it to the NewsLetters Subscribed To list. Similarly, to remove the individual from the mailing list of a newsletter, drag the newsletter from the Newsletters Subscribed to list to the Available Newsletters list. Click **Save** to update the information.

- To duplicate contact information, in the Detail View, click **Duplicate**.

    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, in the Detail View, click the **View Change Log** link located below the Edit button.

- 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 can be exchanged through applications such as Internet mail and Web browsers. In Sugar, you can view and create a vCard file from the record's Detail View. You can save it to your local machine in order to import it into 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. In the Actions list, click **Create from vCard**.

2. On the Contacts Import VCard page, click **Browse** to navigate to the vCard location on the local file system.

3. In the Choose File dialog box, select the file and click **Open**.

   Sugar displays the file path in the **Contacts Import vCard** field.

4. Click **Import vCard**.

   The information in the vCard displays on a new Contacts detail page. The system displays a **vCard** button adjacent to the contact name. You can click this button to open the vCard file and edit the information.

To edit or to save a vCard to a different location

1. In the Detail View of a contact, click the **vCard** button located next to the contact's name.

   The system displays a dialog box asking you if you want to open it or save it on your desktop as a *.vcf* file.

2. To edit the vCard, open it, make the necessary changes and save it; to save it to your local machine, select **Save**.

Accounts Module

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.

The Actions list 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 "**To import account 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. Click **Create Account**.
2. In the Account Overview section, enter the following information:

    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 out campaign emails 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.

In the More Information section, enter the following information:

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 organization associated with the account.

Campaign. To target the account for a marketing campaign, click **Select** to choose an existing campaign.

Industry. From the 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.

In the Other section, specify the following information:

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** 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. 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 all or some accounts on the list, use the Mass Update panel as described in "**Editing and Deleting Multiple Records**".

- To import records, click **Import** in the Actions list of the Home page. For more information on importing data, see "**Importing Data**".

- To export records, select them from the list, click the **Export** link 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 and click **Add to Target List** to select the list from the Target Lists pop-up window.

- To view the details of an account, click its name in the list. The detail page displays sub-panels for related records such as Activities, History, Contacts, Opportunities, and Leads. You can create new records or edit existing ones.

- To edit an account, on the detail page, click **Edit**, 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, click the **Merge Duplicates** link and following the process described in "**Merging Duplicate Records**".

- 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 the email contents into this form and 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, on the detail page, click **Duplicate**, and click **Save**.

  The system duplicates the account and displays its detail 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, on the detail page, click **Delete**.

- To track changes the account, on the account detail page, click **View Change Log** below the Edit button.

- To view or manage related records in a sub-panel, see "**To manage related information in sub-panels**".

Opportunities Module

Use the Opportunities module to create and manage sales opportunities, qualified leads, and view related records.

An opportunity specifies the estimated sales amount for an account 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 sales amount can vary depending on the sales stage.

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**".

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 "**To view a campaign ROI report**".

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 an Account, Contact, or Quote.

To create an opportunity

1. In the Actions list, click **Create Opportunity**.

   Alternatively you can use the Create Opportunity quick form in the Shortcuts Bar. This form contains only the required fields. You can enter information for optional fields after you save the form.

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

Opportunity Name. Enter a name for the opportunity.

Campaign. To associate an opportunity with a campaign, enter the campaign name or click **Select** to select it from the Campaigns list.

Currency. Select the currency used from the drop-down list.

Quote Amount. Enter the estimated amount of the sale.

Account Name. Enter the name of the account related to the opportunity. To choose from the list of existing accounts, click **Select**.

Type. From the drop-down list, specify whether the opportunity is from an existing customer or a potential customer.

Next Step. Enter the next step in closing a sale.

Lead Source. From the drop-down list, specify the lead source such as Trade Show or Cold Call.

Expected Close Date. The expected or estimated close date for this particular opportunity.

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.

Probability (%). The system 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%. However, you can manually change the Probability% value.

Description. Enter a brief description of the opportunity.

In the Other section, specify the following information:

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 some or all the listed opportunities, use the Mass Update sub-panel as described in "**Editing and Deleting Multiple Records**".

- To import records, click **Import** in the Actions list of the Home page. For more information on importing data, see "**Importing Data**".

- To export records, select them from the list, click the **Export** link and follow the process described in "**Exporting Data**".

- To merge duplicates, click the **Merge Duplicates** link and following the process described in "**Merging Duplicate Records**".

- To view the details of an opportunity, click the opportunity name in the list.

- To edit the details, on the detail page, click **Edit**.

- To duplicate an opportunity, on the detail page, click **Duplicate**. 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, on the detail page, click **Delete**.

- To track changes to an opportunity over time, click the **View Change Log** link.

- To view and manage related 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 the email contents into this form 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**".

Activities Module

Use the Activities module to schedule and manage activities such as calls, meetings, and tasks.

An activity is related to a record such as an account or a contact. For example, you can schedule a meeting with one or more contacts to discuss a specific account or opportunity. When you create the activity, you can link it to related notes and attachments. When you associate activities with records, you create a comprehensive history of your activities and correspondence for your assigned accounts and contacts.

From the Detail View of a record, you can view related activities. For example, the Activities sub-panel of an account's Detail View displays scheduled calls, meetings, and tasks. When you schedule an activity, you can also create notes and attachments if necessary.

An activity automatically moves to the History sub-panel when any of the following events occur:

- The activity is manually closed.

- The status of a task is changed to "Completed".

- The status of a scheduled call or meeting is changed to "Held" or "Not Held".

The Actions list of the Activities module displays the following options:

Log Call. Click this option to schedule a call as described in "**Scheduling Calls and Meetings**"

Schedule Meeting. Click this option to schedule a meeting as described in "**Scheduling Calls and Meetings**".

Create Task. Click this option to create a task as described in "**Creating Tasks**".

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 Calls. Click this option to view and manage calls as described in "**To manage calls and meetings**".

View Meetings. Click this option to view and manage meetings as described in "**To manage calls and meetings**".

View Tasks. Click this option to view and manage tasks as described in "**To manage tasks**".

View Notes. Click this option to create or view notes as described in "**Creating Notes and Attachments**".

Import. Click this option to import external data into a note as described in "**Importing Data**".

Using the Calendar

The Activities Home page displays a calendar and a Tasks list. Use the calendar to schedule your appointments, calls, meetings, and tasks. Click on a specific time to schedule a call or a meeting at that time.

To view your calendar by day, week, month or year, click the appropriate button at the top left of the main screen. In each format, any planned activities are displayed along with associated dates. You can 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.

In the Calendar Options sub-panel of your User Settings page, you can create a Publish Key to allow users of other applications such as Microsoft Outlook to view your calendar. For more information, see "**To configure your user settings**".

For any scheduled call or meeting, you can create a related note or attachment. For example, you can add a note summarizing the outcome of a call or a meeting.

You can also perform other activities related to a call or a meeting, such as creating a task and archiving emails.

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. On the Calendar home page, click **Shared**.

The page displays the Shared Calendar sub-panel.

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

   The system 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**.

   The user's calendar displays any existing appointments.

5. To schedule a call or a meeting, click the appropriate option in the Actions list, and follow the process described in "**To schedule a call or a meeting**".

Scheduling Calls and Meetings

You can schedule calls and 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 call or a meeting occurs. After you complete a call or meeting, or if you cancel it for any reason, you can update its status for the record.

When you create the call or a meeting, the Calls page or the 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 call or meeting. If other calls or 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. 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 or a meeting

1. In the Actions list of the Activities Home page, click **Log Call** or **Schedule Meeting**.

2. Enter information in the following fields:

   Subject. Enter the subject of discussion.

   Start Date. Click the **Calendar** icon and select the date. When you enter a date, you must also select the time, in hours and minutes, from the adjoining drop-down lists.

   Status. From the drop-down lists, select one of the following:

   Inbound. This option is for Calls only. Choose this option if it is an inbound call.

   Outbound. This option is for Calls only. Choose this option if it is an outbound call.

   Planned. Choose this option if the call or meeting is scheduled to take place.

> **Held**. After a call or meeting is completed, change the status from Planned to Held.

> **Not Held**. If a call or meeting did not occur for any reason, change the status from Planned to Not Held.

Related to. Optionally, enter or select the name of the related record such as an account, opportunity or contact from the drop-down list.

Reminder. Select this box and specify the default time from the drop-down list below to send a reminder when a call or meeting is due. The system will send out a reminder to all participants at the specified time.

If you set a default time for reminders on your User Settings 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.

Description. Optionally, enter a brief description for the purpose of the call or meeting.

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.

Location. For meetings, optionally, enter the meeting location.

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.

3. Add invitees as described below.

4. Click **Save** to save the call information; click **Cancel** to return to the Calls home page or Meetings home page without saving the information.

5. Click **Send Invites** to send out an invitation to the participants.

6. To create a copy of the call or meeting, click **Close and Create New**.

    The system closes the original call or meeting and changes its status to Held. The new call or meeting that displays on the page 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 Add Invitees sub-panel, 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 a **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.

To manage calls and 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 calls or meetings, use the Mass Update panel as described in "**Editing and Deleting Multiple Records"**.

- To import a list of calls or meetings, click **Import** in the Actions list of the Activities Home page. For more information on importing data, see "**Importing Data"**.

- To view the details of a call or meeting, click its name on the list. To edit a call or a meeting, on the detail page, click **Edit**, revise the information and click **Save**; if you do not want to save your changes, click **Cancel** to exit the page without saving your changes. Associated information such as contacts, users, and notes are displayed in sub-panels.

- To edit or delete multiple calls and meetings, use the Mass Update sub-panel as described in "**Editing and Deleting Multiple Records"**.

- To duplicate a call or meeting, click **Duplicate** in the Detail View. 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 or meeting, on the detail page, click **Delete,** and then click **OK** to confirm the deletion.

- To find a specific call or 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 **Only my items** option.

- To perform an advanced search with additional search filters such as related record, click **Advanced**.

- To edit a related record, click the **Edit** icon in the sub-panel, make the changes, and click **Save**.

- To remove an association with another record, select the record and click the rem icon; click **OK** to confirm the removal.

Creating Tasks

Based on your work-related activities, you can 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. In the Actions list of the Activities Home page, click **Create Task**.

2. On the Tasks page, enter information in the following fields:

    Subject. Enter the subject of the task.

    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**".

    Assigned to. Click **Select** to select the individual who is assigned to the task. By default, it is assigned to you.

    Start Date. Optionally, 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. Optionally, 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. From the drop-down list, select a priority that reflects the importance of completing the task.

    Description. Enter a brief description of the task.

    Status. From the drop-down list, select the current status of the task, such as Not Started, In Progress, and Completed.

    Related to. Enter the name of the related account or click **Select** to search for one. Instead of an account, you can choose another related record such as an opportunity or contact from the drop-down list.

    Contact Name. Click **Select** to select a specific individual who is the contact for the task. By default, it is assigned to you.

3. Click **Save** to create the task; click **Cancel** to exit the page without creating the task.

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.

To manage tasks

●   To edit or delete multiple tasks, use the Mass Update panel as described in "**Editing and Deleting Multiple Records**".

●   To view the details of a task, click its subject. The Tasks page displays details such as the subject, due date, and status.

●   To edit the information, on the detail page, click **Edit**, revise the information, and click **Save**; click **Cancel** to exit the page without saving your changes.

- To duplicate the information, on the detail page, click **Duplicate**, make modifications if needed, and click **Save**; click **Cancel** to exit the page without duplicating the task. 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, click **Import** in the Actions list of the Tasks Home page. For more information on importing data, see "**Importing Data**".

- To delete the task, on the detail page, click **Delete** and click **OK** to confirm the deletion.

Creating Notes and Attachments

You can create or import notes related to a specific call, meeting, or task from the Activities module or from the History sub-panel of a record's Detail View for distribution to participants. 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. You can view notes and attachments associated with a record from in the History sub-panel in the Detail View.

To create a note or add attachments

1. On the Activities tab, click **Create Note or Add Attachments** from the Actions list. Alternatively, click the Create Note or Attachment icon in the Shortcuts Bar.

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

   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.

   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**".

   Related To. Optionally, select the related record from the drop-down list or click the **Select** icon to search for one.

   Note Subject. Enter the subject of the note.

   Attachment. To attach a document that is located on your machine, click **Browse**, navigate to the location of the file, and select the file.

   Note. Enter the text of the note in this box.

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

To manage notes

- To edit or delete multiple notes, use the Mass Update panel as described in "**Editing and Deleting Multiple Records**".

- To view the details of a note, click the subject line. To edit the information, click **Edit**, revise the information, and click **Save**; click **Cancel** to return to the Notes detail page without saving your changes.

- To duplicate the information, click **Duplicate**, make modifications if needed, and click **Save**; click **Cancel** to return to the Notes list without duplicating it. 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 tasks, click **Import** in the Actions list of the Tasks Home page. For more information on importing data, see "**Importing Data**".

- To delete the note, click **Delete** and click **OK** to confirm the deletion. The system deletes the note and returns to the Notes list.

Emails Module

The Emails module is an email client that enables you to manage your emails. You can use the Emails module for the following:

- 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 Search.; the top half of the right panel lists emails, and the bottom half of the right panel displays the contents of the email selected 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 displays options to specify the character set, signature, and automatically check for incoming emails. Some of these settings have default values, which you can change. General settings apply to all your personal mail accounts in Sugar.

To specify general settings

1. Click **Settings** at the top of the page.
2. Enter values for any of the following fields:

Check for New Mail. If you want the system to check your mail accounts automatically for new emails, select a time interval from the drop-down list. The default setting is to check manually or emails.

Send Plain Text Emails Only. Check this box to send emails in plain text format instead of the default HTML format. Although this is the default, you can change an email's format from the Options panel on the Compose email page.

Character Set: From the drop-down list, specify the default character set for outbound emails.

Signatures. From the drop-down list, select an existing signature for your outbound emails. To create a signature, click **Create**, and, on the Signature form, enter a name for the signature, and add it using either HTML or plain text formatting. 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 allow you to view the specified number of emails within each page.

Folder Management. This section displays sub-folders that you created under 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. To save your preferences, click **Done.** Your preferences will be saved and the window will close automatically.

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 a group mail account that is assigned to a team of which you are a member.

For outbound emails, the administrator can set up a default SMTP server that you can use to send out emails. You can specify a different SMTP server if needed. 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 settings page displays your default settings.

To create a mail account

1. Click **Settings** at the top of the page.

   The Settings window displays on the page.

2. On the Mail Accounts tab, click **Add** in the Mail Accounts section.

   Sugar displays the Mail Account Properties window on the screen.

3. In the Incoming Email section, enter information for the following fields:

> **Mail Account Name**. Enter a name for the mail account in Sugar.

> **User Name**. Enter the user name of your external mail account.

> **Password**. Enter the password of your external mail account.

> **Mail Server Address**. To access a Gmail account, click **Prefill Gmail Defaults** to autofill the mail server address, port number, and protocol. 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**. From the drop-down list, select IMAP.

> The following fields display below:

>> **Monitored Folders**. This field displays when you select IMAP as the protocol. By default, the system monitors the Inbox. To monitor other folders, click **Select** to view a list of available folders in the external mail account. To select multiple folders, hold down the Shift key or the Ctrl key. After you select the folders that you want to view in Sugar, click **OK** to view them in your inbox.

>> **Trash Folder**. To select a Trash folder from the Folders list, click **Select.** After you specify the trash folder, click **OK**.

>> **Sent Folder**. To add a folder to view your outbound emails, click **Select.** After you specify a folder, click **OK**.

> **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 Gmail Defaults** link.

> **Mail Server Port**. The system automatically populates this field with the port number for IMAP.

4. Click **Test Settings** to ensure that the specified information is correct. If errors are detected, the system will display an error message.

5. In the Outgoing Email section, enter the following information:

> **From Name**. The system automatically populates this field 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**. If you want responses to your emails to be directed to an email address other than the one specified in your incoming email account, enter it in this field.

> **Outgoing SMTP Mail Server**. Select an existing SMTP server from the drop-down list, or select **Add** to specify a new SMTP server as described in **"To add a mail server for outbound emails"**.

6. Click **Done** to create the mail account.

> The mail account appears 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 window, 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.

7. 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 is used when you compose emails in Sugar.

8. 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 window.

 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.

To add a mail server for outbound emails

1. Click the **Add** button located below the Outgoing Mail Server list.

 The Outbound Mail Server Properties page displays on the screen. You can select Gmail, Yahoo!, Exchange, or Other.

2. Add the server as follows:

 o To add the Gmail server or the Yahoo! server, click the appropriate button, and enter the email address and password in the fields below.

 o 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.

To manage 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.

To create 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.

To manage accounts and folders

1. To check for new mail in your external mail account, right-click the account in Sugar, and select **Check Mail**.

2. To synchronize the contents of your external mail accounts with the view in Sugar, select the account, right-click, and select **Synchronize**.

3. To delete a folder, select it, right-click, and choose **Delete Folder**. Click OK to confirm the action.

4. 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.

5. 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 specified in your User settings. When composing an email, you can also assign it to a different team, specify an email template, and change the signature. You can also associate an email with another record when you compose the email, or after you send it out.

You can also quickly compose emails using the Quick Compose form from other records, such as accounts, without leaving the record view. To access this form, click any email address in the List View of any module, the Detail View of any record, or the Compose Email button in the Activities sub-panel of a record's Detail View.

To compose an Email

1. On the Emails Home page, click **Compose Email**.

   Alternatively, you can 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. This will display the Quick Compose email form.

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

   From. To route the email through a specific mail account, click the down arrow to select an existing one from the drop-down list. 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.

   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.

   To send the email in plain text, click the Options tab in the right-hand panel and select the **Send in Plain Text** box.

3. To attach a file to the email click **Attach Files**.

   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**.

4. 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**".

5. To change the signature from the default, in the Options panel, select the signature from the Signatures drop-down list.

6. 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.

7. 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 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.

To view and manage 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 "**To import emails to 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 "**To create 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 "**To assign 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.

To use the address book

1. To view the address book, click the **To** button on the Compose Email page.

   The Address Book window displays on the screen. 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**.

   The selected names display 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 and teams 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.

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.

   The Import Settings window displays on the screen.

3. Enter information for the following fields:

Teams. The email record is, by default, assigned to your default team specified in your User Settings 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** to import the emails into Sugar.

   Sugar displays a message after the email has been successfully imported. The import email now displays in your My Emails folder.

To assign emails to users and teams

To assign one or more imported emails from your My Emails folder or from a Group account to a different user or team, do the following:

1. Select the email from the list, right-click, and select **Assign To**.

   The Assign To dialog box displays on the screen

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 appropriate **Select** 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.

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, your teams, 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.

To relate an email with another record

1. Select the email from the list, right-click, and select **Relate**.

   The Relate Email dialog box displays on the screen.

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 page.

To create 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**".

To create an email template

1. In the Actions list of the Emails module, click **Create Email Template**.

   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:

   Name. Enter a name for the template.

   Team. From the drop-down list, select the team that is allowed to view the template.

   Description. Enter a brief description about the template.

   Insert Variable. From the drop-down list, select the record, for example, select a contact and select a field such as Full Name and click **Insert**.

   The system displays the variable in the Body field.

3. **Insert Tracker URL**. This field displays only when you create the template from the email marketing record of an email campaign. From the drop-down list, select the tracker URL 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.

4. **Subject**. Enter the title of the message.

5. **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.

6. 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.

7. **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.

8. **Attachments**:

   To attach a file, including images, click **Browse** to navigate to its location on your local machine, and select it.

   The attached file displays below the Browse button.

   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.

9. Click **Save** to create the template.

To manage 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**.

Reports Module

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 so on.

The Reports list displays reports in the order that you viewed them with the report accessed last 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.

Sugar provides several pre-defined reports for your use, which are listed on the Reports Home page. You can also create custom reports tailored to your requirements. These include reports on forecasts, open cases, accounts, and usage metrics. In addition, Sugar provides tracker reports, discussed in detail in "**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 consisting of those 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 Actions list of the Reports module displays options to view existing reports for specific modules.

Note: After upgrading 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 *Enterprise* reports. When you create a standard report, you use the Report Wizard, a Sugar query builder, to generate the report output. You can create several types of standard reports, as discussed in **Report Types**.

When you create an enterprise report, you can write complex SQL queries. Only administrators can create Enterprise reports.

For information on creating standard reports, see "**Creating Standard Reports**". For information on creating enterprise reports, see "**Creating Enterprise Reports**".

Report Types

You can create the following four types of reports:

- 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. If the report contains a grouping, then you can choose from an additional set of columns, which display data values from records within the selected module. These include computed derivatives from numeric-only data values such as SUM, AVG, MAX, MIN, and a weighted average.

You can view a summation report in a chart format and display it 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.
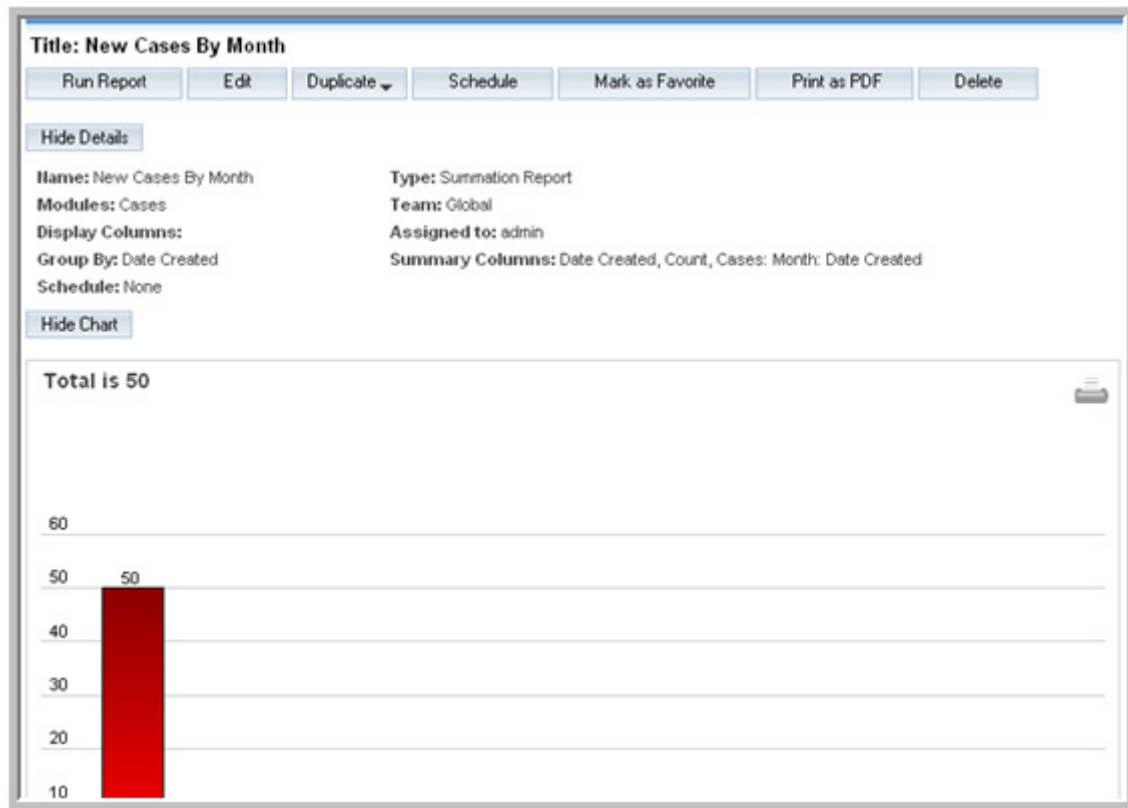
Summation Report with Details

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 assigned user and sort the results in ascending or descending order.

Example. The following report lists open cases by month, grouped by assigned user.

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.

Matrix Reports

Matrix reports are similar to summation reports. However, 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, by sales stage, and by assigned user.

This report contains data in following column orders: Count,SUM: Amount,SUM: Probability (%)

Type	Value Proposition			Negotiation Review			Prospecting			Qualification			Id. Decision Makers			chri
	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 you run it in the Report Viewer.

The process of creating a standard report is as follows:

1. Select the report type.

2. Select a module. This is the primary module, and related modules are listed below this module.

3. Select one or more fields from any listed module as the filters.

4. For Summation, Summation with Details, and Matrix reports, select the group-by fields that you would like to use to group records. You can select fields from more than one module. For matrix reports, you can use a maximum of three fields to group records.

5. For a Summation, Summation with Details, and Matrix reports, optionally, you can select a chart type.

   For Summation with Details and Row and Columns reports, select the display columns for the report.

6. 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: To ensure that custom fields display in the list of available fields for filters and group-by columns in the Reports Wizard, clear the Reports cache. To clear the cache, log out and log into Sugar.

At every step of the process listed above, you must enter values to be able to proceed to the next step.

Setting Filters

Filters consist of fields, operators and, optionally, values (depending on the operator).

You use the Add Filter Group button to create filter groups. You can 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 may be Equals, Contains, Starts With, Ends With, and Does Not Equal, Is, Is Empty, and Is Not Empty.

> Operators for numeric fields can be any of the following: Equals, Less Than, Greater Than, Is Between (requires two numeric values), Does Not Equal, 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, and Next Year.

You can 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

You also have the option of using a dynamic filter called "Current User". The Current User is any user who is currently logged in and running the report. The Current User 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 whoever is logged in and running the report.

For reports on activities such as calls, meetings, and tasks, you can filter by record and/or by user. 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.

When you create and save a report, the system saves the report definition. Only the assigned user or a member of the assigned team has the permissions to change the report definition. If the report definition is modified, the system displays an alert when you try to run the report.

Sugar also provides a Run-time option that allows you to modify report filter values in the Report Viewer when you run the report. The Report Wizard still retains the original filter values for the report. When another user runs the report, the original filter values are used. This enables users to modify a shared report for their use without altering the original filter values. Your run-time filter values are preserved for use when you run the report again. However, they will be deleted if another user changes the filters in the Report Wizard. If an assigned user or team member adds a new filter, the system alerts you of the change when you run the report.

To create a Summation report

1. In the Actions list of the Reports module, click **Create Report**.

    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**.

    Sugar displays a list of modules on the page.

3. Select the module of your choice.

    The related modules display below the primary module, in the Related Modules pane. When you select a module from the list, the Available Fields header displays the module name and displays the module fields in the drop-down list below. You can use one or more of these fields as filters.

4. In the Field Name pane, click a field to select it as a filter.

    Sugar displays the filters 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 if you want to apply the filter values only at the time you run the report.

7. Click **Next** to define Group By columns.

8. In the Related Modules column, select the module; select one or more fields from the Available Fields drop-down list as the group-by columns.

    If you select a date field you must also group by day, month, quarter, or year.

9. Click **Next** to move to the Display Summaries page.

10. From the Available Fields drop-down list, select **Count** as one of the columns. The system also includes the Group By columns that you selected in the previous step.

11. Click **Next** to view the chart options.

    For more information on creating a chart, see "**Creating Report Charts**".

12. Click **Next** to move to the Report Details page.

13. Enter a name for the report.

14. If you want to display the SQL query when you run the report, select **Show Query**.

15. In the Assigned to field, click **Select** and choose the user you want to assign to manage the report.

In the Team field, 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**".

16. 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.

17. To preview the report results before saving it, click **Preview**.

18. To navigate back to a specific step in the report building process to view or edit the criteria, click **Back**.

19. 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**.

    When you run the report, the report results display on the page. 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. After you specify the Display Summary columns, click **Next** to choose the Display Columns.

    Select the appropriate Order By button to order the report output by the corresponding column. Depending on the column you choose, you can order the data in ascending order or descending order.

4. The report results are grouped according to the specified Display columns and order.

5. Click **Next** and, optionally, select a chart type.

6. Click **Next** to move to the Report Details page to enter details such as the report name and assigned use.

7. 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. On the Reports Home page, click **Create Report** 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 rows 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. On the Reports home page, click **Create Report**.

2. Select Rows and Columns Report.

3. Select the module of your choice.

4. Define filters as detailed in "**To create a Summation report**".

5. Click **Next** to 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 to enter details such as report name and assigned user and to save the report.

7. Click **Save** to generate the report without running it; click **Save & Run** to generate the report and run it.

Creating Report Charts

You can 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. During the course of creating a summation or a matrix report, on the Chart Options page of the Report Wizard, enter the following information:

    o   **Chart Type**. Select an type, such as Horizontal or Vertical this drop-down list.

    o   **Data Series**. Select an available grouping function from the drop-down list, such as Count, AVG, MIN, MAX. The options that display in this drop-down list depend on the group-by options and display columns options that you select to create the report.

    o   **Description**. Enter a brief description of the chart.

    o   **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.

    The chart displays when you run the report. You can add it 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 procedure outlined in **"To duplicate a report"**.

*   To add one or more reports to your list of frequently viewed reports, select them from the List View and click **Mark as Favorite**. Alternatively, on a report's Detail View, click **Mark as Favorite**.

*   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**. Alternatively, click **Delete** in the report's Detail View.

To duplicate a report

1. On the report's detail page, click **Duplicate**.

2. From the drop-down list, specify whether you want 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: If a Summation report or a Summation with Details report has more than three group-by columns, you will not have the option of saving it 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 list below the module tabs. Trackers also enable users to navigate back and forth between previously accessed records.

Tracker reports provide administrators and supervisors with visibility into user actions and system performance. Tracker reports show user actions such as the 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 that you can view in a Tracker report depends on your 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.

To enable a user to view tracker data and create tracker reports, the administrator must assign the Tracker role to that individual.

Tracker reports are broadly classified into the following types:

Trackers: This report, which 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, which tracks queries that exceed the slow query time limit, 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

Columns	Description
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, which tracks user access session data, 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, which tracks performance-related information, 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.

Columns	Description
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 for your use. 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. To view the Tracker tab and to run and create tracker reports, you need access permissions from the administrator.

1. My Usage Metrics: A report that shows 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.

2. My Module Usage: A report that shows the cumulative sum for each module you accessed for a specified time period such as a day, week, or month.

3. Slow Queries: A query report that lists SQL queries that were slow to execute, along with the time it took for execution.

4. Users Usage Metrics: A sessions report that lists the cumulative sum for the server response time (in seconds), total database round trips, and total files opened by the user.

5. My Records Modified: A report listing the modules whose records you modified in the past week.

6. My Recently Modified Records: A report that shows modules in which you recently modified records.

7. Modules Used by My Direct Reports: A report that shows 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.

8. Records Modified by My Direct Reports: A report that shows the modules in which your direct reports recently modified records.

9. Active User Sessions: A report that shows active sessions for a specific user during the last seven days.

10. User Sessions: A report that shows active sessions for all users during the last seven days.

To create a tracker report

1. In the Actions list of the Reports module, click **Create Report**.

2. On the Report Wizard page, select the report type such as Summation or Matrix.

3. Select the Tracker Report type of your choice and follow the process described in "**Creating Standard Reports**".

Creating Enterprise Reports

Enterprise reports enable you to use complex SQL queries that cannot be expressed in standard reports. Only administrators can create enterprise reports and make them accessible to the appropriate users. Users can use enterprise reports if the administrator grants them permission to view and run them.

An enterprise 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.

When you create an enterprise report, you define the header information such as the report name and title. After you save it, you will need to edit the report to specify the data format. Any data format that you select 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. You can export each individual data set separately if needed.

To create an enterprise report

1. In the Actions list of the Reports module, click **Manage Enterprise Reports**.
2. On the Enterprise Reports page, click **Create Enterprise Report**.
3. On the Create Report page, enter information for the following fields:

   Report Name. Enter a name for the report.

   Report Title. Enter a title for the report.

   Report Alignment. From the drop-down list, select the alignment of the report text.

   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 report.

4. To save the report, click **Save**.

   The system lists the new report in the All Enterprise Reports sub-panel on the Create Report page.

5. Click the report name in the list and click **Report Details** to view the detail page.

   From this page, you can create a data format or select an existing one.

6. To select a data format, click **Select** and click the one you want in the Data Format list.

   To create a new data format, click **Create New**. For more information, see "**To create a data format**".

7. To generate the report, click **Run Report**.

8. To view the report output, in the Actions list, click Enterprise Report List and select the report that you want to view.

    The Create Report page displays the report output. On this page, you can click **Report Details** to manage the report details or click **Edit Report** to manage the report header.

Using SQL Queries

Enterprise reports enable you 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. In the Actions list, click **Enterprise Reporting** 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. Within a data format, you can reference other data formats. Therefore, 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 fashion. 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}'
```

When executed, the combined data format will do the following:

- 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. In the Actions list of the Enterprise Reports home page, click **Create Data Format**.

2. On the Data Format page, enter information for the following fields:

   Data Format Name. Enter a name for the data format.

   Report Name. When you associate this data format with a report, the system populates this field with the report name

   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. If the query you selected has a child query, the system populate this field with the name of the child query.

   Parent Data Format. If you are creating a child for another data format, click **Select**, and in the Data Format List, click the name of the data format to select it.

   Description. Enter a brief description of the data format.

   Table Width %. From the drop-down list, select Percentage or Pixels; enter a numeric value in the adjoining field.

   Font Size. From the drop-down list, select the font size for the report text.

   Exportable (CSV File Only). Select this box to enable users to export the data format in CSV format.

   Header Text Color. From the drop-down list, select a color for the report header.

   Show Header. Select this box to display the report header in the report.

   Body Text Color. From the drop-down list, select a color for the report text.

   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. From the drop-down list, select a background color for the report header.

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. From the drop-down list, select a color for the body background.

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

Scheduling Reports

You can schedule to run a report at periodic intervals. The system automatically runs the report at the specified intervals and emails it to you as a PDF file.

To schedule a report

1. In the Reports list on the Reports home page, click **--none--**in the Schedule Report column.

   Sugar displays the Schedule Report dialog box on the page.

2. In the Schedule Report window, enter values for the following fields:

   Start Date. Click the Calendar icon and select a date to begin scheduling the report.

   Time Interval. From the drop-down list, select the intervals at which to run the report and receive the output.

   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.

3. Click **Update Schedule**.

   The system schedules the report at the specified time and emails the PDF file to you.

Quotes Module

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

When you create a quote, you can select a product from the product catalog, or you can manually enter information on products that are not in the catalog. When you select from the catalog, the system automatically 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 information of line items from the product catalog. However, you can modify pricing information of line items that you manually enter into the system.

Each quote line item creates a product record in the Products module, and any change to a status of a quote is reflected in the associated product record. For example, when the status of a quote changes to "Closed Accepted", the product record's status changes to "Ordered".

To create a quote

1. In the Actions list of the Quotes tab, click **Create Quote**.

   You can also create quotes from the Detail View of an account, contact, or opportunity.

2. On the Quotes page, enter information for the following fields.

   Quote Subject. Enter information on the product or service for which you are creating the quote.

   Quote Number. The system generates a reference number after you save the quote.

   Purchase Order Num. Enter the purchase order number if one exists.

   Payment Terms. From the drop-down list, select the time period within which the customer must pay for the product or service purchased.

   Opportunity Name. From the drop-down list, select the opportunity that resulted in this quote.

   Quote Stage. From the drop-down list, select the current stage of the quote's life cycle, such as Draft or Confirmed.

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.

In the 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 respectively.

In the Address Information section, the system the system automatically populates the address of the selected account. You can modify the address if necessary.

In the 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 User List. By default, this record is assigned to you.

In the Line Items section, the system displays the default currency and tax rate. If the currency used in the quote is a different one, you can select it from the Currency drop-down list. Similarly, you can select the appropriate tax rate for the State from the Tax Rate drop-down list.

To enter line items, click **Add Group** to select or enter one or more products or services for the quote, and enter the following details:

Group Name. Enter a name for the product group.

Group Stage. From the drop-down list, select the current status of the group such as Draft or Negotiation.

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. From the drop-down list, select a shipping provider to deliver the product to the customer.

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.

Optionally, in the Description section, enter a brief description for the quote.

Delete Group. Click this button if you want to delete the group.

To add another group, click **Add Group** again.

3. In the Description section, enter a brief description of the quote.

4. 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 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

1. After you add a group, click **Add Row**.

   The system displays fields to specify the item information. You can click **Add Row** again to add another item.

   Enter the following information:

   Quantity. Enter the total number of unit for this product.

   Product. To manually add a product, enter the product name; to select from the product catalog, click **Select**, select the item from the product catalog, and click it in the Product Catalog List View. The system adds it as a line item in the quote.

   Mft Num. Enter the 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. Enter the actual cost of the item. If you selected an item from the catalog, the system automatically enters the appropriate number in this field.

   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. Enter the list price for the product. If you selected an item from the catalog, the system automatically enters the appropriate number in this field.

   Unit Price. Enter the price that is being offered to the customer. This may be lower than the list price.

   Discount. If a discount is applicable, enter either the dollar amount or the percentage of the unit price. If you entered a percentage, check the % checkbox.

   The system calculates and displays the subtotal, discount, tax, shipping and the final billing amount in the section below the row.

   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 on the list.

- To edit the quote, on the detail page, click **Edit**.

- To update or delete all or some of the quotes in the list, use the Mass Update as described in "**To edit or delete multiple records"**.

- To duplicate a quote, on the detail page, click **Duplicate**. 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, on the detail page, click **Delete**.

- To track changes made to a quote over time, click the **View Change Log** link.

- 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 the email contents into this form and save it for your records.

- To create a new opportunity for a quote, click **Create Opportunity from Quote**.

  When you renew an expired quote, you may want to create a new opportunity related to that quote. This ensures that any opportunity-based forecast reflects the new quote.

- To attach an external file to the quote, on the quote's detail page, click **Create Note or Attachment** in the History sub-panel.

  o To add a note, enter the subject and the text, and click **Save**.

  o To add an attachment, click **Full Form**, and on the Notes page, click the **Browse** button, which is 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's detail 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 adjacent drop-down list before you 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 out emails.

Before you generate the PDF, check the following settings on your User Settings page:

- Ensure that you have selected the appropriate main font size and data font size in the PDF Settings section.

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

- Ensure that you have selected the appropriate character set from the Import/Export Character Set drop-down list in the User Settings 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. Ensure that the quote specifies a contact with a valid email address.

2. On the quote's detail page, click **E-mail as PDF**.

   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 Extended Price. Sugar generates a standard title in the Subject field and a standard message in the Body field; you can edit these as 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.

Campaigns Module

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

Typically, 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.

From Contacts, Leads, and Opportunities, you can associate a record with an existing campaign.

Creating and Importing Campaign 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. However, you can add contacts, leads, and users to a campaign's target list.

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.
- Run a report on accounts, contacts, leads, or targets, and add the report results to the target list.

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

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.

Note that if you have multiple targets with the same email address, Sugar will send the campaign email to only one of the targets, chosen at random. The other email addresses, 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. From the Actions list on the Campaigns Home page, click **Create Target List**. Alternatively, you can create or select an existing target list from the campaign's Detail View.

2. On the Target Lists page, enter the following information:

   Name. Enter a name for the target list.

   Type. From the drop-down list, select the target list type such as Default or Seed.

   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. **Team**. 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**".

   Description. Enter a brief description of the target list.

4. Click **Save** to save the target list; click **Cancel** to exit the page without creating the list.

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

To create a target

1. In the Actions list, click **Create Target**. Alternatively, from the Target List's Detail View, you can create a new target, select from existing target records, or select a report containing target records.

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. On the Targets page, enter information for the following fields:

    Target Information

    First Name. Enter the target's first name.

    Last Name. Enter the target's last name.

    Office Phone. Enter the target's work number.

    Mobile. Enter the target's mobile phone number.

    Home. Enter the target's home phone number.

    Other Phone. Enter the alternative phone number, if any.

    Fax. Enter the target's fax number.

    Assistant. Enter the target's assistant's name.

    Assistant Phone. Enter the assistant's phone number.

    Department. Enter the name of the department to which the target belongs.

    Birthdate. Enter the target's birth date.

    Account Name. Enter the name of the account related to the target.

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

    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.

    Email Address(es). 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.

    Address Information. Enter the primary address and other address information. To copy information from one section to the other, you can enter the address information in one section and click the arrow button to copy it to the other section.

    Description. Enter a brief description of the target.

3. Click **Save** to create the target; click **Cancel** to exit the page without creating the target.

When you save the target, the record is added to the List View. You can now add the target to an existing target list. The target's detail page displays the Campaign Log sub-panel, which lists all the campaigns that were sent to the target.

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 in the Actions list.

To create a campaign

1. In the Actions list of the Campaigns module, select **Create Campaign (Classic)**.

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 team fields and enter the team names. For more information on teams, see "**Assigning Records to Users and Teams**".

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

   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

In order to send out an email campaign, both the administrator and the user must perform a set of tasks.

The administrator must complete the following tasks:

1. Set up outbound emails to enable you to send out email campaigns, and specify the number of campaign emails in each batch.

2. 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.

3. 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 Campaign 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 Campaign 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. On the campaign's detail page, 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. In the Actions list of the Campaigns module, click **Create Campaign (Wizard)**.

    The Campaign wizard displays on the screen.

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

    The screen below illustrates a Newsletter campaign.

3. Enter information for the following fields:

    o   **Name**. Enter the campaign name.

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

    o   **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.

    o   **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**".

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

    o   **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.

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

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

    o   **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:

    o   **Budget**. Enter a numerical value for the campaign budget.

    o   **Actual Cost**. Enter the actual cost of the campaign.

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

    o   **Expected Cost.** Enter the expected cost of the campaign.

    o   **Expected Revenue**. Enter the estimated revenue from the campaign.

    o   **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, the Target Lists screen displays 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.

   The target list name displays 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 want 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. In the Actions list of the Campaigns module, click **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 "**Editing and Deleting 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 Campaign List sub-panel on the Campaigns Home page, click the **Export** icon, 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. Note that 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 response by targets, 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. In the Actions list of the Campaigns module, click **Create Lead Form**.

   The fields from the Leads page displays on the screen.

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

    To move all the fields, click **Add All Fields**.

3. Click **Next**.

    The Form Properties page displays on the page.

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 to access the 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 "**To assign users and teams to records**".

    Form footer. Enter the form footer, if needed.

5. To create the form, click **Generate Form**.

    The system generates the form and displays it in the TinyMCE editor. You can modify the form if needed, then click **Save Web To Lead Form** to save your changes.

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 the link 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 Settings 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. On the Campaign's detail page, click **Mail Merge**.

   Step 1 of the Mail Merge process displays on the page. The Campaigns module is already 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 Module

Use the Cases module to track and manage problems with your products or services that are 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, click **Import** in the Actions list of the Cases module. For more information on importing data, see "**Importing Data**".

To create a case

In the Actions list of the Cases module, click **Create Case**

1. On the Cases page, enter information in the following fields:

   Priority. From the drop-down list, specify the urgency of the problem.

   Status. From the drop-down list, specify the current status of the problem such as New or Closed.

   Type. Select Administration, User, or Product from the drop-down list if you want to categorize the case.

   Subject. Enter a brief statement of the problem.

   Account Name. Enter the name of associated account or click **Select** to choose the account.

   Description. Enter a clear description of the problem.

   Resolution. Enter the results of the investigation into the problem.

   In the Other section, specify the following information:

   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. 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.

If the administrator has enabled email notification, then case owners receive an email whenever a case is assigned to them.

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.

Sugar displays the case Detail View on the screen. On this page, you can create new bugs for the case or associate it with existing bugs. 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 some or all cases, use the Mass Update panel as described in "**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.

- To edit the case details, click **Edit** on the detail page, make the changes and click **Save**.

- To view or run a Case report, click **Case Reports** in the Actions list and select the report from the Report List. For information on running reports, see "**Reports Module**".

- To import records, click **Import** in the Actions list. 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 page, click the **Export** icon, and export them as described in "**Exporting Data**".

- To merge duplicates, click the **Merge Duplicates** link and following the process described in "**Merging Duplicate Records**".

- To duplicate a case, click **Duplicate** on the detail page. Duplication is a convenient way of creating a similar case. You can change the information in the duplicate record to create a new case.

- To find duplicates, click **Find Duplicates** on the detail page.

- To create an article, click **Create Article** on the detail page. Existing articles are listed in the Articles sub-panel on the case's detail page. For more information on creating articles, see "**Knowledge Base Module**".

- To delete a case, click **Delete** on the detail page.

- To track changes to the case over time, click the **View Change Log** link.

- To create or edit related 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 the email contents into this form and save it for your records.

Bug Tracker Module

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

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

1. In the Actions list, click **Report Bug**.

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

    Subject. Enter a brief statement of the problem.

    Priority. From the drop-down list, specify the urgency of the problem.

    Source. From the drop-down list, specify whether the bug was reported by an internal user, by an external user through email, through your organization's website, or by an external developer community member on your organization's forum.

    Category. From the drop-down list, select the product associated with the bug.

    Found in Release. From the drop-down list, select product version in which the bug was found.

    Type. From the drop-down list, select **Defect** if the issue is a problem with the product. Select **Feature** if the issue is a suggested enhancement for the product.

    Status. From the drop-down list, specify the current status of the problem such as New or Closed.

    Resolution. From the drop-down list, select the resolution to the bug.

    Fixed in Release. From the drop-down list, select the product version in which the bug was fixed.

Description. Enter a description of the problem.

Work Log. Use this field to record your actions to resolve the bug.

In the Other section, specify the following information:

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.

The bug detail page displays on the screen. On this page, you can associate the bug with related records such as contacts and projects. 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 for your use. You can edit these reports to suit your needs. 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 which has the ⬚ icon beside it; to reverse the sort order, click the column title again.

- To edit or delete some or all of the bugs, use the Mass Update panel as described in "**Editing and Deleting Multiple Records**".

- To run a pre-defined Bug report, click **Bug Reports** in the Actions list.

- To import records, click **Import** in the Actions list. For more information on importing data, see "**Importing Data**".

- To export records, select them from the list, click the **Export** link and follow the process described in "**Exporting Data**".

- To merge duplicates, click the **Merge Duplicates** link and following the process described in "**Merging Duplicate Records**".

- To view the details of a bug, on the Bug Tracker home page, click the bug in the Subject column.

- To edit the bug details, on the detail page, click **Edit**.

- To duplicate a bug, on the detail page, click **Duplicate**. 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, on the detail page, click **Delete**.

- To track changes to the bug over time, click the **View Change Log** link below the Edit button.

- To export information on one or more bugs, select them in the Bug List sub-panel on the Bugs Tracker Home page, click the **Export** icon, and export them as described 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, 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 the email contents into this form and save it for your records.

Knowledge Base Module

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

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

Creating Articles

You can 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.

Like other records in Sugar, 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. However, you can assign a different primary team and author. You can also assign additional teams to the article. Note that only members of the assigned teams can access the article. Therefore, 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 states 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 enable the user to share the information with other users without copying or duplicating the information.

Tagging Articles

Tags are similar to folders. They allow you to categorize articles according to specific criteria, such as a topic, to locate the ones that you want easily. 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. However, note that 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 whereas users need the appropriate team memberships to view articles.

To create an article

1. In the Actions list of the Knowledge Base module, click **Create Article**.

   To create an article from a case, click **Create Article** from the case's Detail View.

   The Article page displays on the screen. When you create an article from a case, the system automatically fills in the article details such as title, subject, and body with information extracted from that record.

2. Enter information for the following fields:

   Title. Enter the title of the article.

   External Article. Select this box to make the article available not only to Sugar users but also to 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 the drop-down list. To make the article available for viewing, the status must be set to Published.

   Teams. To change the primary team assignment, from the drop-down list, select 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**".

Author. By default, you are the assigned author. However, you can 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. By default, the administrator is the reviewer. However, you can click **Select** and choose a different reviewer from the Users list.

Expiration Date. Optionally, you can enter an expiration date for the article. After the expiration date, the article will not display in search results. External articles will not display in Sugar Portal after the expiration date.

Tags. To link the article with a new or existing tag, click the Tags **Select** button.

The Tags window displays on the screen. 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.

   Sugar displays the record's Detail View on the screen.

To create a tag or to search for a tag

1. In the article's Edit view, click the Tag's **Select** button.

   The Tags dialog box displays on the page. 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

You can browse through tagged articles, or you can use various filters such as keywords, tags, and title to find the articles that you want.

Because every article is assigned to at least one team, the search results will only list articles that you are allowed to access due to 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 that you use. The guidelines below demonstrate basic search rules.

- You can search for keywords and phrases. Keywords and phrases are not case-sensitive.

- Phrases must be enclosed in double quotes; for example, "the whole nine yards".

- To specify multiple keywords, you can use spaces. Using spaces is similar to using the OR operator. For example, if you search for *brown blue*, the search results will return articles that contain brown or blue.

- Using the plus (+) sign will return articles that have both the words. For example, *brown +blue* will return only articles that contain both the words.

- To ensure that a word is included in the search, use the plus (+) sign before the word. 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"*.

- To exclude keywords or phrases, use the minus (-) sign. For example, *brown blue -yellow*. When you specify a word in the Excluding these words field in Advanced Search, you do not need to use the minus sign.

- 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. In the Actions list of the Knowledge Base tab, click **Articles**.

   The Search tab displays on the page.

2. Enter one or more keywords or a phrase in the search field to find articles that contain them.

3. To restrict the search, select a criterion from the **Search within** drop-down list.

4. Click **Search**.

To perform an advanced search

1. Select the Advanced tab and specify one or more of the following criteria:

   Search within: From the drop-down list, select the criterion such as a time period or a tag.

   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.

   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: In order to exclude a keyword or phrase, you must first specify the keyword or phrase that you want to find in the Containing these words field.

   Under this Tag: Enter the tag name or click **Select** to choose the tag from the Article Tag list.

2. For more search filters, click **More Options**.

3. Specify any of the following criteria:

   Title. Enter the article's title.

   Viewing Frequency. From the drop-down list, select the number of articles that were viewed most frequently or the least frequently.

   Status. From the drop-down list, select the article's status such as Draft or Published.

   Team. To search for articles assigned to a team, enter the name of the team or click **Select** to choose a team from the Teams list.

   Note: If you are not a member of the selected team, the search results will not display any articles.

   Approved By. To search for articles assigned to a specific approver, enter the person's name or click **Select** to choose a user from the Users list.

Author. To search for articles authored by a specific user, enter the person's name or click **Select** to choose the user from the Users list.

Published After. To search for articles published after a specific date, enter the date or click the calendar icon to select it.

Expires After. To search for articles that expires after a specific date, enter the date or click the calendar icon to select it.

Save this search as. To save the specified search criteria for future use, enter a name, for example Search1, and click **Save**.

Previous Saved Searches. To search using a saved search criteria, select the name of the saved search from the drop-down list and click **Search**.

4. 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.

5. Click an article name to view its contents.

   Click the article name to view its contents. Alternatively, point the cursor at the article name to view its contents in a separate window as shown below. You can display the contents of multiple articles simultaneously in this manner.

To browse for an article

1. In the Actions list of the Knowledge Base module, click **Articles**, and select the **Browse** tab.

   Sugar displays a list of existing tabs on the page.

2. To view the articles and sub-tags nested within a tag, click the + sign.

3. Select a tag to view its contents. Sugar displays all articles within a selected tag in the right panel.

4. To view the contents of an article, place the cursor on the article name.

   The contents display in a separate window.

5. To perform an action such as editing or emailing the article, click the article name.

Documents Module

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.

To create a document

1. In the Actions list of the Documents module, click **Create Documents**.
2. On the Documents page, enter information for the following fields:

   File Name. Enter the 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 the drop-down list. If the document does not belong to any of the listed types, select None.

   Status. From the drop-down list, select the status to indicate the current state of the document such as Draft or Under Review.

   Revision. If you revised this document, enter the revision number.

   Template. Select this box if you are creating a template.

   Category. Select a pre-defined category from the drop-down list. If none of the categories apply, select None.

   Sub Category. If you selected a category, select the category subset, if applicable.

   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 only 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.

   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.

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. From the drop-down list, select 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.

Any file that you attached when you created the document displays on the detail page in the Download File field. Click the attachment to open it or to save it to your local machine. Right-click the attachment to bookmark it, copy it, and to view its properties.

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 some or all the documents, use the Mass Update panel as described in "**Editing and Deleting Multiple Records**".

- To view the details of a document, on the Documents home page, click its name in the list; links to attachments, if any, are displayed below Description.

- To view an attachment, click the **attachment** link; To update an attachment, see "**To update an attachment**".

- To edit a document, on the detail page, click **Edit**.

- To duplicate a document, on the detail page, click **Duplicate**. 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, on the detail page, click **Delete**.

- To track changes to the document over time, click the **View Change Log** link below the Edit button.

- To export documents, select them in the Document List sub-panel on the Documents Home page, click the **Export** icon, and export them as described in "**Exporting Data**".

- To create or manage the related records in a sub-panel, see "**To manage related information in sub-panels**".

To update an attachment

1. In the Document Revisions sub-panel of the document's detail page, click **Create**.

   The Documents Revision page displays on the screen. The current document name and revision number appear on this 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. Specify a revision number for the revised document.

   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

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

- If a document is a Mail Merge template, the document type displays as "Mail Merge" on the detail page.

- In the navigation bar, a link allows direct access to the Sugar Mail Merge Wizard.

Products Module

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, which is a list that is manually maintained by the administrator, 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.
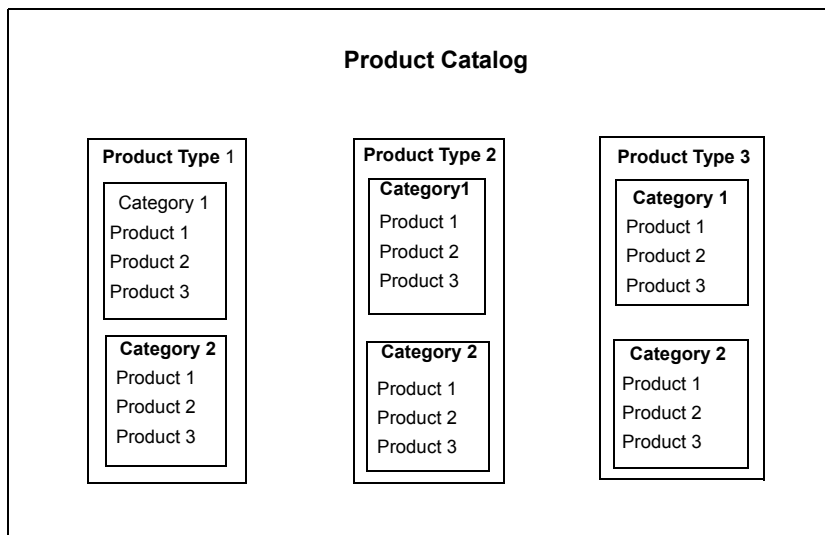
However, if your organization does not maintain a product catalog or if you need to define a product that is not in the catalog, you can create a free standing item. Products that you define are not added to the product catalog.

Defining Products

When you define a product, you can select a type and a category from the existing list set up by the administrator. This allows 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 page.

The Products home page typically lists products that you define but not those from the Product Catalog. However, 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 from the record's Detail View.

To define a product

1. In the Actions list of the Products module, click **Create Product**.

   Alternatively, you can also create products from a line item within a quote, and from the Detail View of accounts and contacts.

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

   Product. Enter a name for the product; to select from the product catalog, click **Select**.

   For more information on the catalog, see "**To select an item from the product catalog**".

   Status. From the drop-down list, select the current status for the related account such as Shipped or Quoted.

   Account Name. Enter the name of the related account; to select from the Accounts list, click **Select** and then click the account name.

   Contact Name. Click **Select** to view the Contacts list; click the contact name to add it to the product information.

   Quantity. Enter a number that specifies the product quantity for the account.

   Purchased. If the product is being purchased, click the **Calendar** icon and select the purchase date.

   Serial Number. Enter the product's serial number.

   Asset Number. Enter the product's internal inventory number.

   Support Starts. If your organization needs to provide product support, click the **Calendar** icon and select the date when support begins.

   Support Expires. Click the **Calendar** icon and select the date when support stops.

   Currency. From the drop-down list, select the currency in which the account will pay for the product.

Cost. Enter the actual cost of the product.

List Price. Enter the list price for the product.

Unit Price. Enter the unit price for the product.

Book Value. If the account is purchasing the product, enter the amount of the order that was booked.

Book Value Date. Enter the date on which the order was booked.

Product URL. For products that are presented online, enter the URL to the website.

Manufacturer. From the drop-down list, select the product manufacturer.

Mft Part Number. Enter the manufacturer's part number for the product.

Vendor Part Number. If your organization is the vendor, enter your part number for the product.

Tax Class. From the drop-down list, specify whether the product is taxable or not.

Weight. Enter the product weight.

Category. From the drop-down list, select the category to which the product belongs.

Type. From the drop-down list, select the product type.

Description. Enter a brief description of the product.

Support Title. Enter the title of the Support personnel who will be providing product support.

Support Desc. Enter a brief support description.

Support Contact. Enter the name of the user who is responsible for providing support to the account.

Support Term. From the drop-down list, select the term for which support will be provided.

3. To create the product, click **Save**; to exit the page without creating the product, click **Cancel**.

   The product is now listed in the Products List View.

To select an item from the product catalog

1. When you create a product, click the **Select** button that is located next to the Product field to select an item.

   The product catalog page displays on the screen.

   This page displays three sub-panels.

   o The Search sub-panel enables you to search for a product by name, category, type, or manufacturer.

   o The Product Catalog sub-panel displays product categories in a hierarchical manner.

   o The Product Catalog List sub-panel displays independent nodes (records) of each product category within the catalog tree. That is, 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, in the Product Catalog sub-panel, click + located next to the category name.

   When you click a parent node, the system displays its children in the Product Catalog List.

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

   The system 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 their respective 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, in the Related Products section of the record's Detail View, click Select. In the pop-up window, you can search for the related product 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 some or all products in the Products list, use the Mass Update panel as described in "**Editing and Deleting Multiple Records"**.

- To view the details of a product, on the Products home page, click the product name in the list.

- To edit the product details, on the detail page, click **Edit**, update the information and click **Save**.

- To duplicate a product, on the detail page, click **Duplicate**. 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, on the detail page, click **Delete**.

- To track changes to a product, on the detail page, click the **View Change Log** link.

- To import product information, click **Import** in the Actions list. For more information on importing data, see "**Importing Data"**.

- To export information on one or more products, select them in the Product List sub-panel on the Products Home page, click the **Export** icon, and export them as described in "**Exporting Data"**.

- To manage records in a sub-panel, see "**To manage related information in sub-panels"**.

Forecasts Module

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 in order to enable you to use it.

A forecast consists of the following:

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

About Time Periods

Typically, forecasts are based on month, quarter, or year. However, 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.

About 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 think they can generate in sales. The information that the Forecasts Worksheet displays depends on your role in the Sales organization.

Regardless of what is entered on the worksheet, the performance of sales representatives is, typically, measured against their sales quotas. However, the worksheet enables Sales Managers to make more accurate sales predication for a specific time period because it displays a tree view of the reporting hierarchy of the

sales organization. The manager can then drill down to the opportunities that 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 Forecasting Sugar Dashlet on your home page for easy access to your worksheet. For more information on adding Sugar Dashlets, see "**Managing Sugar Dashlets**".

In the Forecast module, teams are based on the reporting hierarchy. You can play 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. The displayed opportunities are those with a "closed" date that fall within the specified time period.

The system 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 a reflection of the opportunity's estimated sales amount.

The *probability* percentage displayed in the worksheet is a reflection of the opportunity's sales stage.

The *weighted* amount is the amount that may be realized from the sale. The system calculates 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 $1000.00.

You can commit the totals of the above amounts as the numbers that you will generate in sales. However, if you choose to commit different values for your best case, likely case, and worst case forecasts, you can use the worksheet to do so. Note that your manager can override your input and enter a new committed amount on their worksheet. However, that will not impact the amounts that you enter on your worksheet.

You can view your quota for the selected time period at the top of the Forecast 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). In order to notify your manager of any changes that you make, you will need to commit at the Rollup level.

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. That is, your changes do not display on their worksheet.

The forecast worksheet also displays a Create Opportunity quick form that you can use 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

While the worksheet allows you to monitor sales forecasts closely, the worksheet chart allows 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. To gauge your performance during the past few quarters, you can view your final committed amount as a stacked group-by chart on the View Chart tab.

To edit the forecast worksheet

1. On the forecast worksheet, select the time period from the Time Periods drop-down list.

   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 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 Forecast Worksheet page, select Forecast History.

   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**.

Contracts Module

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

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.

The document details are as follows:

- **Document Name**. The name of the document that is related to the contract.

- **Template**. Indicates whether the document is a template.

- **Document Type**. The type of document. For example, a License Agreement or a Statement of Work.

- **Selected Revision**. The version number of the document that is related to the contract.

- **Latest Revision**. The most current revision of the document. Your organization may update documents periodically resulting in several versions of the same document. To ensure that the contract is related to the appropriate version, Sugar tracks document revisions. When a new revision is created, the ⚡latest icon displays on the line. Click this icon to substitute the older version with the latest revision of the document in the contract. The Selected Revision column reflects the change in the revision number and the ⚡latest icon no longer displays on the line.

  Signed (🖼 signed): After the customer signs a document, the contract administrator must scan the signed document into the system to create a Sugar document. This allows users to view the signed document in the Documents sub-panel. Therefore, when the 🖼 signed icon displays on a line, contact the contract administrator to check whether the contact has been signed and scanned. After the document has

been scanned, click the ▦ signed icon to navigate to the Documents screen. In the Documents screen, specify the location of the scanned document and other information such as the revision number. The ▦ signed icon no longer displays on the line, indicating that the signed document has been scanned into the system.

Edit (✎| edit): Click this icon to edit the document.

Remove (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.

To create a contract

1. In the Actions list of the Contacts module, click **Create Contract**.

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

   Contract Name. The name of the contract.

   Reference Code. Your 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. The opportunity to which the contract is related.

3. **Teams**. 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**".

   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.

   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.

4. Click **Save** to create the new contract; click **Delete** to exit the page without creating the contract.

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 "**Editing and Deleting 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**".

Projects Module

Use the Projects Module to create and manage projects for your organization.

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 user and to multiple teams. For more information on teams, see "**Assigning Records to Users and Teams**".

Note that 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. In the Actions list, click **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**.

   The Gantt view displays two blanks rows on the screen. Each row represents an individual task. To add a new task, click the **Insert 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**.

From a task's detail page, 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.

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 home page, select **Create Project Template**.

   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 **Project Templates** from the Actions list.

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. On the project's detail page, click **View Gantt**.

   Sugar displays the Gantt view on the screen.

2. Click **Resource Report**.

   Sugar displays the Resource Report form 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. On the project's detail page, 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.

Employees Module

Use the Employees module to view information such as name, title, and email address for employees in your organization.

While all Sugar users are employees, not all employees are Sugar users. To be a user, an employee needs a username and password to log into Sugar.

Creating Employees

Administrators can create and manage employee records.

To create an employee

1. Click **Create Employee** in the Actions list.

   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"**.

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.

Using Sugar Mobile

Sugar Mobile enables you to access the mobile view of Sugar from a wireless device, such as a Smart phone, to view your daily activities and manage your assigned records. You can view all records that are assigned to you, your teams, and your direct reports.

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. For more information on creating Saved Searches, see "**Saving Search Criteria and Layout**"

Viewing and Creating Records from Sugar Mobile

You can use Sugar Mobile to access the Sugar modules from a wireless device. You can also create records in some modules from a wireless device. 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.

On the Welcome screen, you can view activities for the day as well as a list of records that you last viewed. From this screen, you can select the module that you want to access.

3. To access a module, select it from the drop-down list and click **Go**.

Sugar displays a Search form on the screen.

4. By default, the Only my items option is selected to filter for records that are assigned to you.

5. To search for all your assigned records, leave the search field blank and select the Only My Items box; click **Search**.

6. 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.

The search results display on the screen.

The list of records is paginated. The administrator sets the number of records that display per page.

7. To view a record, select it from the list.

The record's Detail View displays on the screen. From this screen, you can edit records that are assigned to you. You can only view records that are not assigned to you.

8. To edit a record that is assigned to you, scroll down and click **Edit**.

The Edit View displays on the screen.

9. Make the necessary changes and click **Save**.

10. To view a list of related records, in the Detail View, scroll down to the Related Information sub-panel.

The list of related records is paginated. The administrator sets the number of related records that display per page.

11. To view the details of a related record, select it from the list.

12. To edit the record, click **Edit**.

13. Make the necessary changes and click **Save**.

To create Sugar records from a wireless device

1. Select a module from the drop-down list and click **Create**.

    The new record's fields display on the screen.

2. Enter the necessary information such as the record name and the user assigned to it.

3. Click **Save** to create the record.

    The record's Detail View displays on the screen.

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. From the Saved Searches drop-down list, select the one you want to view.

2. Click **Search**.

    The saved search results display on the screen.

3. To view a record, select it from the search results.

Importing Data

You can import new data into Sugar as well as update existing data. Though the discussions in this chapter focus on importing data through CSV (Comma Separated Value) files, you can also use files in TSV (Tab Separated Value) or custom delimited formats.

You can import data for the following Sugar modules.

- Accounts: Accounts are "Company" records. You can import this data as a comma-delimited, tab-delimited, or custom delimited file, and from Salesforce.com and ACT!.

- Contacts: A contact is a person who belongs to an account. You can import this data as a comma-delimited, tab-delimited, or custom delimited file, and from Microsoft Outlook, Salesforce.com, and ACT!

- Leads, Opportunities, and Cases: Prospects are considered Leads in Sugar. Opportunities are your sales opportunities, and Cases are the customer-reported issues regarding your product. You can import this data as a comma-delimited, tab-delimited, or custom delimited file, and from Salesforce.com.

- Targets: Targets are the people who receive your campaign emails. You can import this data as a comma-delimited, tab-delimited, or custom delimited file.

- Activities (Calls, meetings, tasks, and notes): You can import this data as a comma-delimited, tab-delimited, or custom delimited file, and from Salesforce.com.

Note: You cannot import data for custom Flex Relate fields.

Administrators can also import the following data.

- Users. These are employees within your organization who are Sugar users. You can import this data as a comma-delimited, or tab-delimited file, custom delimited files, and Salesforce.com.

- Product, Product Types, Product Categories, and Tax Rates. You can import this data as a comma-delimited, tab-delimited, or custom delimited file, and from Salesforce.com.

During import, the system populates fields in newly created related Sugar records based on fields in the imported data. For example, when you import a contact with a listed account name, Sugar auto-populates the phone number, email address, and mail address fields.

Overview of the Import Process

The process of importing data into Sugar, and best-practice recommendations are listed below.

Step 1. Extract data. To import data into Sugar, you must first obtain the data from the existing system.Tools such as ACT! have their own export capabilities. If you are moving to Sugar from a CRM system, you will need to contact them to obtain your data. If the data, for example, is in an Excel spreadsheet, you can save it as a CSV file on your machine, and import it into Sugar. You will need a single CSV file for each Sugar module. Ensure that the import file has a header row containing the names of the associated fields to ease the mapping process.

Step 2. Cleanse the data:

o   Check for spelling errors, incorrect formatting, and missing information.

o   Delete duplicate records, if any.

o   Remove any identifiers in your existing data because Sugar creates its own unique identifiers during the import process. Sugar uses "ID" fields for identifiers, therefore, if you want to retain the field values of your identifiers, ensure they are not named "ID".

o   Sugar treats columns named "date_entered" and "date_modified" specially. If your data contains column names titled "date_entered" and "date_modified" and you want to retain the original date values, create custom fields to store these values. For information on creating custom fields, see "**Studio"**.

Step 3. Prepare mappings. If you see fields in the CSV file that do not map directly to Sugar fields, create custom fields in Studio and add them to the Edit View and Detail View layouts to store that data. See "**Mapping Data"**for more information.

Step 4. Perform an import test. Save a small subset of your data as a CSV file and use it to map data in a trial run of the import. You can save this mapping to use later. Always import the Account data first and then import contacts, leads, and other data. This enables Sugar to create a relationship automatically between an account and associated contacts, as well as other records containing the same account name.

Step 5. Import the data. Use the custom mappings that you built in the previous step. If you have a large amount of data running into thousands of records, it is recommended that you import them in smaller batches to ensure that the process is successful.

To import data

1.   In the Actions list of the module's home page, click **Import**.

   The first step in the import process displays on the screen.

2.   Select one of the following as the data source:

   Comma Delimited File. Select this option if the fields in the import file are separated by a comma or if the file is in .csv format.

Fields Qualified By: Identify the qualifier, if any, enclosing each field including delimiters in the import file. When you export Sugar records, the system uses double quotes as the qualifier.

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

> **None**. The import file does not contain any qualifiers.
>
> **Double Quotes**. The import file contains double quotes as qualifiers. For example: *"abc","xyz","efg"*.

Note:	When you export records containing multi-select field items, the items are typically separated by carats or commas in the export csv file. Hence, you must use double quotes to successfully this data.

> **Single Quotes**. The import file contains single quotes as qualifiers. For example: *'abc','xyz','efg'*.
>
> **Other**. The import file contains a qualifier other than single quotes or double quotes.

Tab Delimited File. Select this option if the fields in the import file are separated by a tab and the file extension is .txt.

Custom Delimited File. Select this option if the import file uses a delimiter other than a comma or a tab. Enter the delimiter in the **Fields Delimited By** field and enter the delimiter in the adjacent field.

Salesforce.com. Select this option if the import file is located in the Salesforce.com database. Instructions to import from Salesforce display on the screen.

Note:	Salesforce record IDs are case-sensitive. Therefore, records that have the same ID but with variation in case are treated as separate records. However, MySQL and MS SQL databases do not recognize the case-sensitivity and treat such IDs as one ID. As a result, some records may not be successfully imported, and parent-child relationships may be lost during import.

Act!2005. This option is available only for Sugar modules that are mapped to a corresponding module in ACT and the import data is located in the Act! 2005 database.

Microsoft Outlook. This option is available only to import contacts into Sugar.

3. Under Import Action, select one of the following:

> **Create Records**: Select this option to create new records.
>
> If the import file contains record IDs that already exist in Sugar, and you do not map the IDs to the ID fields in the module, then new records will be created. If you map those IDs to the ID fields in the module, then import will not occur. The error log displays "ID already exists in this table" for each row containing an existing ID.
>
> **Create and Update Records**: Select this option to create new records and update existing records with new values. To update records, the import file must contain the record IDs. This will avoid record duplication.

4. Click **Next** to proceed to the next step in the import process.

Upload the file containing the import data from your local file system. Depending on the specified data source, the information you see on this page will vary.

5. In the Select file field, enter the path to the file location; or click **Browse** to navigate to the file location on your machine.

6. If the file has a header row, check the **Has Header** box.

    Typically, a header row contains column titles such as Name and Address.

7. Click **Next** to proceed to the next step in the import process.

    The page displays, for the first record in your import file, a preview of the mapping between the fields in the Sugar database and the headers in the import file. You can change the mapping if needed. The Database Field column displays a drop-down list of all fields that exist in the Sugar database for the module. The system automatically finds possible matches for the field names in the Header row and selects them in the Database Field column. For unmapped fields, the Do not map this field option displays in the Database Field column. You can change the mapping if needed. If you do not want leave the Do not map this field unchanged.

    The Header Row column displays field titles in the header row for the first record in the import file.

    The Default Value column provides the option to enter a value if the import file does not contain a value for the field. For example, 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.

    Row 1 displays data from the first non-header field in the first record of the import file.

8. To add additional data to a record for which the import file does not have a corresponding field, scroll down to the bottom of the page and click **Add Field**. Select an existing field in the Sugar database from the drop-down list and enter its value in the corresponding Default Value field.

    The field with the new value is added to the list of database fields; to remove it, click the corresponding Remove Field button.

9. To save the mapping as a custom mapping that you can use repeatedly, scroll down to the bottom of the page and enter a name in the **Save Mapping as** field.

    Saved mappings are listed on the first page of the import process.

10. To modify the datetime format or other settings to match those in the import file, scroll down to the bottom of the page and click **Show Advanced Options**.

    Advanced Options displays the default settings, including the datetime format, from your User Settings page. You can change the default settings if necessary.

11. To check for duplicate entries, click **Show Advanced Options**. To check for duplicates using fields such as Team ID and Assigned users, move the desired indexes from the Index(es) Not Used column to the Index(es) Used column using the left arrow button.

    To remove a field that you do not want to use to check for duplicates, use the right arrow to move it back to the Index(es) Not Used column. Use the up and down arrows to sort the order in which the indexes are checked for duplicates.

12. Click **Import Now** to import the data.

The Import Results page lists the imported data and lists how many fields were successfully imported and how many were skipped.

If the import is unsuccessful or partially successful, Sugar displays a link o view the rows that were not imported and the error messages. You will be prompted to download the .csv file containing the information. You can download the file, correct the errors, and then import those records into Sugar.

13. If you do not want to save the imported data because of incorrect mapping, click **Undo Last Import**; You can click **Try Again** to restart the import process.

The system will not duplicate the record when you restart the import process.

14. To import additional data, click **Import More**.

15. To return to the module's home page, click the **Return to** button.

Importing Account Data

If you are importing account data from another CRM system, typically, that system understands the distinction between a contact and an account – that one account can have multiple contacts, and has separate data for each contact. However, you can import just contact data from simpler Contact Manager applications– such as Microsoft Outlook.

You can relate records to accounts during import in the Accounts, Contacts, and Opportunities modules. Create an account spreadsheet and import account records into the Accounts module first. This will ensure that when you import other related records such as contacts, cases, and opportunities later, those relationships are preserved.

Note: If you are importing data into a custom module that allows you to relate records to accounts, import the account records first if they are not already in Sugar to ensure the new account record fields are populated.

To import account data

If you are importing account data from a CRM system, proceed to step 4. If you exported contact data, and want to import it as account data into Sugar, do the following:

1. Copy your exported *contacts.csv* file and save it as *Accounts.csv.*

2. Edit the *Accounts.csv* file using Excel. First, sort the file on the column which contains the company name.

   As you scroll through your data, sorted by company name, you may see successive records that have the same company name if there is more than one contact from that account (in Sugar's terminology). To avoid creating multiple copies of the same account in Sugar, you need to delete the duplicate contacts. And to make sure that the most complete information is attached to the account record, retain only the contact whose address and telephone information best represents the account as a whole.

Also look out for company names that are similar but not identical because to inconsistencies in the way the company name was entered – you should delete all duplicate records except the one with the company name spelled exactly how you want to see it in Sugar.

3. Save the Excel file as a .csv file type.

4. In the Actions list of the Accounts module, click **Import** and follow the process described in "**To import data"**.

After the account data has been imported, you can export contacts from your current Contact Manager application and then import them into Sugar.

Importing Contact Data

If you import a contact record that refers to an unknown account, then a new contact record is automatically created for an account of that name. Note that when account records are created automatically in this fashion, they are empty. That is, they have associated contacts but no address or telephone information. Therefore, you will need to add those details manually later. To avoid this task, it is recommended that you import the account data first to create complete records with address and telephone information (and other information depending on your previous CRM system) and then import contact data.

To export contacts from your current contact manager application

The process below describes exporting contact information through Outlook 2003. Other systems work in a similar manner.

1. Under the File menu, select **Import and Export**.

   The Import and Export Wizard dialog box displays on the page.

2. Select **Export to a file** and click **Next**.

3. Select the option to create a file of the type Comma Separated Values (Windows), and click **Next**.

4. Select an Outlook folder from which to export – typically your contacts folder - and click **Next**.

5. Enter the filename and directory location for the exported file to be created, and click **Next**.

6. To confirm your intention to export this file, click **Finish**.

   Outlook 2003 creates a .csv file. To ensure that the data has been exported successfully, you can view the file using Microsoft Excel or a text editor.

Now you can import the contact data as described earlier in "**To import data"**.

During import, ensure that you correctly map the names of the incoming fields with the names of the corresponding Sugar fields. If you are importing from Outlook, a particularly important field mapping is the incoming Company field to the Account Name field within Sugar. This is required to ensure that contacts are associated with the correct accounts.

Importing Drop-down List Values

To successfully import drop-down list options, ensure that the import file contains database values (that is, item names) and not the display labels. This is because Sugar requires the ID associated with each option that is stored in the database.

To do this, confirm that the drop-down value you are importing is listed in your spreadsheet as it appears in the database. You can contact your system administrator to retrieve the database value for you, or you can also view it yourself by reviewing the HTML source code for a record's Edit View.

To copy drop-down list values

1. From the List View, select the desired record to view its details.

2. In the Detail view, click **Edit**.

3. In the Edit View, highlight the appropriate drop-down field, drop-down selection box, and the next available database field. You must highlight the next available database field to capture the drop-down selection box values.

4. Right-click the highlighted fields and select **View Selection Source**.

   The Source of Selection window displays the source code, including the drop-down list values.

5. Enter the appropriate database values without the quotation marks into the corresponding column of the import spreadsheet.

Mapping Data

When you import data, you will need to map it to fields that exist in the Sugar database. For example, to map the first and last names of contacts that you import into Sugar, these fields must exist in the Sugar database. If not, you will need to create these fields in Sugar before you import the data.

The last stage of the import process provides an Advanced Options section to view your import file settings. Advanced Options lists the default settings in your User Settings page. Ensure that the File Encoding format, Date format, and Time format match those in the import file. If not, change the settings under Advanced Options before you import the data. For example, if the import file is using EUC-JP and your default setting is UTF-8, you will need to change the default setting to EUC-JP.

You can save mappings for future use. You can also publish saved mappings to enable other users to use them. In the process of mapping data, you can assign a record to a user or a team.

File Encoding allows you to use an import file that is in another language. That is, a file with a different character encoding than in the Sugar instance. During the import, if the user selects the appropriate file encoding, then the data will be imported with the encoding specified for the Sugar instance.

To manage saved mappings

- To use a saved mapping, on the Import page, select the mapping before proceeding to Step 2 of the import process.

- To publish a mapping that you saved, on the Import page, select the mapping and click **Publish**.

  The mapping is now listed on the Import page of your team members. They have the option of deleting it, if needed.

- To un-publish a mapping that you published, click **Un-publish** on the Image page.

  The mapping is now no longer available to other members of your team.

Exporting Data

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.

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. To export specific records, select them from the List View on the module's home page and click **Export**. To export all records listed on the page, or all existing records in the module, 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.

    The system displays an "Opening.csv" dialog box.

2. Select **Open** to open the export file in .csv format or select **Save to Disk** to save the .csv file to your local machine.

3. 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.

Administering Sugar

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

Topics include:

- **Configuring Settings in Sugar**
- **Users**
- **Sugar Connect**
- **System**
- **Email**
- **Developer Tools**
- **Products and Quotes**
- **Bug Tracker**
- **Forecasts**
- **Contract Types**
- **Employee Records**
- **Knowledge Base Administration**
- **Advanced Configuration Options**
- **Sharing Calendar Information in Microsoft Outlook**

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

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

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

When you log into Sugar as an administrator, you will see the Admin link at the top right. Click this link to view the Administration page. This page displays several sections that group tasks according to the area of administration.

Configuring Settings in Sugar

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

To specify system-wide settings

1. On the Welcome to Sugar screen, click **Next** to view the Branding screen.

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

2. Enter the following information:

   Name. Enter the name that you want displayed in the title bar of your browser.

   Select Logo. Specify the image file, in .png or .jpg format, containing your organization's logo. Click **Browse** to navigate to the file's location and upload it. The recommended size of the logo is 212x40 pixels.

3. Click **Next** to view the System Locale Settings screen.

4. Specify the default settings for displaying data format, such as time, date, and currency, in Sugar. The default language pack is US English. If you have installed other language packs, you can select a language from the Language drop-down list.

5. Click **Next** to view the SMTP Server Specification screen.

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

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

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

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

   o If you are not using any of the above, click **Other**, and enter the name of the SMTP server, and optionally, enter the appropriate username and password for SMPT authentication.

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

8. Click **Next**.

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

9. To configure your user settings, click **Continue**. For information on configuring user settings, see "**Accessing Sugar and Setting Your User Preferences**".

10. To view options to perform other administrative such as creating users and teams, click the left arrow located next to the Logout option at the top right of the page, and select **Admin**.

Sugar displays the Administration Home page on the screen. The tasks that you can perform from this page are described below.

Users

This section consists of the following options to manage teams, users, and roles.

- **User Management**
- **Team Management**
- **Role Management**
- **Password Management**

User Management

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

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

A *System Administrator user* is a user who has administrative privileges in Sugar to perform tasks such as creating users. The System Administrator can access all modules and records.

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

A *Portal API User* is used by portals created in Sugar to access the system. Portal API users do not count towards the number of Sugar licenses that you purchase for your organization.

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

You can assign users to roles and teams depending on the tasks they perform for the organization. If necessary, you can reassign a user's records to other users. For example, when a user leaves the organization you can reassign that individual's tasks to other members of the team.

Note: You cannot delete users but you can deactivate them. Inactive users do not count towards the number of Sugar licenses you purchase for your organization.

To create a regular user or an administrator user

1. In the Users panel of the Administration Home page, click **User Management**.

   The Users Home page displays on the page.

2. Click **Create New User** from the Actions list.

3. On the Users Profile tab, enter the following information:

   a. On the User Profile section, enter the user's name, user type, and current status. If you do not select a user type, the system creates a Regular user. If you have downloaded the person's photo in .jpg or .png format on your local machine, click **Browse** to navigate to the location and upload the picture into the record.

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

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

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

5. On the Advanced tab, you can specify default system settings, such as locale settings, as described in "**Editing Your User Settings**". You can enable the Mail Merge option to enable the use of the Sugar Plug-in for Word to merge names and addresses from Sugar with form letter templates created in Word. You can also specify the user's Offline Client status. If the user has installed the Offline Client and is using it, select **Active**; if the Offline Client is installed but not being used, select **Inactive**.

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

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

7. To create the user, click **Save**; click **Cancel** to exit the page without creating the user.

You can now assign the user to roles and teams.

To assign roles and teams to a user

1. Select the user from the Users list to view the detail page.

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

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

3. To assign the user to a team, scroll down the page, click **Select** in the My Teams sub-panel and select one or more teams that you want to assign to the user.

   The user is assigned to the team and the team is now listed in the My Teams sub-panel.

To reassign records to a different user

1. From the Actions list on the Users Home page, select **Reassign Records**.

   Sugar displays the Reassign Records page on the screen.

2. Select the user whose records you want to reassign.

3. Select the new user to whom you want to assign the records.

4. From the Set Team drop-down list, select the new user's team, if necessary. If both users belong to the same team, use the default value of No Change.

5. From the Modules to include list, select the modules to assign to the new user.

6. Records related to the selected modules will be reassigned to the new user.

7. To assign only specific records, select one or more filters from the Filter list that displays below. For example, to assign only new and pending bugs, you can select New and Pending as the filters.

8. Click **Submit** to reassign the records.

9. On the Record Reassignment page, do the following:

   a. If you are planning to use the Record Reassignment function with an existing workflow, select the **Verbose Output** checkbox.

   b. If you are planning on sending email notifications and adding record reassignments to the Audit table, check the **Include Workflow/Notifications/Audit** checkbox.

10. Click **Continue** to proceed with the reassignment.

    Sugar displays the Record Reassignment Processing Accounts page on the screen.

11. Click **Return** to return to the Record Reassignment page.

To manage user information

- To update the status of some or all users, including Sugar Users, Offline Client users, and Sugar administrators use the Mass Update panel on the Users Home page as described in "**Editing and Deleting Multiple Records**".

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

- To edit user details, click **Edit** on the detail page, change the information as needed, and click **Save**.

- To duplicate the user details, on the detail page, click **Duplicate**, edit the information as necessary, and click **Save**. The following field values cannot be duplicated: Publish key, Layout options, Email addresses, User settings, and Locale settings.

- To import user data, click **Import**.

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

To create a Portal API User

1. Select **Create Portal API User** from the Users' menu.

2. Enter a user name for the Portal API user in the User Name field.

3. Enter the name of the external application in the Name field.

4. In the Status field, select Active to allow the application log in; select Inactive to prevent the application from logging in.

5. In the Password tab, enter a password for the Web Services user and confirm it.

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

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

To create a Group User

1. Select **Create Group User** from the Users menu.

2. Enter a user name for the Group User in the User Name field. For example, Support.

3. Enter the Group User's name in the Name field. For example, Support Queue

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

5. In the Password tab, enter a password for the user and confirm it.

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

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

Team Management

Use the Team Management option to group users into teams to manage records in a secure manner.

Teams provide data security because users can access a record only if they are members of a team that is assigned to manage the record. Teams apply to every

record in Sugar. All records are assigned to at least one team, and can be assigned to more than one team.

A user can belong to one or more teams.

Sugar provides the following teams for your use:

- **Private**: Sugar creates a private team for every user. Only the user can access and manage records assigned to the user's own private team. Private teams include the reporting hierarchy. Hence, users can see the records of any user who is below them in the hierarchy, regardless of their team membership.

- **Global**: This is the universal team. When users are created, they are members of the Global team by default. Every user can view records assigned to the Global team.

- **East**: This team is provided for your use and has no special characteristics.

- **West**: This team is provided for your use and has no special characteristics.

CAUTION: Do not delete the Global team. Editing this team is not recommended.

Administrators are implicit members of every team, and can, therefore, see all records.

Users can be both explicitly and implicitly assigned to teams, and will appear as either Member, or Member Reports-to. When a user is manually, or explicitly, assigned to a team, the user's reporting hierarchy is implicitly added to the team as well. This ensures that members of the user's management hierarchy also have visibility into the user's records. For example, if Will and Chris both report to Jim, and Will is a member of the East team, and Chris is a member of the West team, then Jim will be an implicit member of the East and West teams. To delete Jim from the West team, either Chris must be removed from the West team, or he must no longer report to Jim.

Implicit members appear as Member Reports-to in the Membership column.

Implicit team membership has the following characteristics:

- Implicit team members cannot be removed from teams; the Remove icon does not appear next to their names.

- Implicit team members can also be explicitly, or manually, assigned to teams; the Remove icon will appear next to their names.

- Due to the implicit membership, clicking the Remove icon will not remove them from the team.

- To remove an implicit member from a team, either a down-level user in the reporting hierarchy must be removed from the team, OR the reporting hierarchy must be broken.

You can create any number of teams, depending on the needs of your organization. For example, based on the reporting hierarchy, you may want to create a team of users who report to the same manager. Based on product management requirements, you may want to create a cross-functional team of users who report to different managers but who manage the same product.

By default, all Sugar records such as accounts, contracts, and opportunities are assigned to a specific team and can only be accessed by the members of that team. If

users spread across multiple teams need to access a record, it can be assigned to multiple teams. In such cases, the user who creates the record can select a primary team and one or more secondary teams.

Note: Users who are assigned to a record can access it regardless of team membership.

To create a team

1. In the Actions list of the Teams Home page, click **Create Team**.

2. On the Teams page, enter the team name and a brief description.

3. Click **Save** to create the team; click **Cancel** to exit the page without saving your changes.

   The system creates the team. Now, you need to assign users to the team.

4. On the detail page, click **Select** in the Users sub-panel to view the Users list.

5. Select the users whom you want to add to the team and click **Select**; to search for a user, use the Search field on the top of the page.

   The names of the selected users display in the Users sub-panel on the team's detail page.

6. To go back to the Teams Home page, click **Teams** in the Actions list.

To manage team information

1. To view a team's Detail View, click the team's name in the Team list.

2. To edit team details, on the detail page, click **Edit**, change the information as needed, and click **Save**.

3. To duplicate the team details, on the detail page, click **Duplicate**, edit the information as necessary, and click **Save**.

4. To export team information such as team name and team ID, select the records in List View, and click **Export**. For more information, see the chapter on importing and exporting data.

5. To delete the team, on the detail page, click **Delete**; to delete multiple teams, select the teams from the Teams Home page, and click **Delete**. If the team has existing record assignments, follow the process described in the section below.

Reassigning Records During Team Deletion

Before you can delete a team, you must reassign any records that have been assigned to that team. You can reassign records en-mass when you delete the team.

To delete a team and reassign records

1. Navigate to the Detail View of the team that you want to delete and click **Delete**.

   Sugar displays a message asking if you want to delete the record.

2. Click **OK**.

If the team has been assigned records, Sugar displays a message stating that records have been assigned to the team and to select a replacement team.

3. Click the **Select** button that is located next to the New Team field, and select the replacement team from the Team List.

4. Click **Reassign** and click **OK** to confirm the reassignment.

   The system reassigns the records to the new team, deletes the former team, and displays the Team List View.

Creating Team Notices

For each team, you can create team notices to broadcast team-specific information to team members. These broadcasts display as a scrolling marquee in the Team Notices dashlet of the each team member's home page.

To create a team notice

1. In the Actions list of the Teams Home page, click **Team Notices**.

2. On the Team Notice Home page, click **Create Team Notice**.

   The Team Notices page displays on the page.

3. Enter information for the following fields:

   Date Start. Click the Calendar icon and select the date to begin broadcasting the team notice.

   Date End. Click the Calendar icon and select the date to end the broadcast.

   Team. Click **Select** to view the team list; click a team name to select it.

   Status. From the drop-down list, select **Visible** to make the notice visible to team members; select Hidden to hide the notice.

   Title. Enter the message title.

   Description. Enter the message text.

   URL Title. Enter a title for the notice URL. This title is a hyperlink to the URL.

   URL. Enter the notice URL. The URL hyperlink is inserted into the Team Notices.

4. To create the team, click **Save**; click **Cancel** to exit the page without saving your changes.

5. To view the Team Notice list, click **Team Notices** in the Actions list.

To manage team notices

1. To update the start date and end date of some or all notices, use the Mass Update panel on the Team Notices Home page as described in "**Editing and Deleting Multiple Records**"".

2. To edit a notice, click its title in the Team Notices list, revise the details as needed, and click **Save**.

3. To delete one or more notices, on the Team Notices Home page, select the notice you want to delete and click the corresponding Delete icon.

Role Management

Roles control user actions on records, whereas teams control record data access.

A role defines a set of permissions to perform actions such as viewing, editing, and deleting information. You can control user actions by restricting access to modules and module fields to users who are assigned to certain roles.

Users are affected by a role only if they are assigned to it. That is, users who are not assigned a role can, by default, access and take any action in any module. Users can have multiple roles assigned to them, and a role can be assigned to multiple users.

Some examples are:

- Assign engineers in your organization to a role that prevents access to the Opportunities module.

- Assign junior sales representatives to a role that allows them to edit opportunities, accounts, and contacts, but not delete them.

For more fine-grained access control, you can restrict access to specific fields within a module. For example, you can restrict access to the billing address within the Accounts module. You can grant limited access or hide the fields completely.

For organizations that would like to delegate ownership of specific tasks in certain modules to groups or individuals, Sugar provides different access types within roles. Roles can provide users with administrator access to manage all records in a specified module, and developer access to customize modules using the Developer Tools and to configure any administrative settings specific for the module.

The access types that Sugar provides through roles are as follows:

- **Normal**: The user granted this access type can view and manage records depending on team membership. Regular users are granted Normal access type.

- **Admin***: The user granted this access type can administer all records in the specified module regardless of team membership. However, the user does not have access to administration tools such as Studio and Workflow Management.

- **Developer**: The user granted this access type has developer privileges for the specified module. This allows the user to access the administration and development tools, namely Studio, Workflow Management, and Dropdown Editor, that are required to customize the module. Additionally, the user can access any administration tools that are available to manage the modules. For example, the user may be able to access the Releases tool for the Bugs module or the Time Periods tool for the Forecast module. However, appropriate team membership is required to view records in the module. Users with Developer access to Users, Teams, and Roles are allowed to manage users, passwords, teams, and roles.

Note: A System Administrator can access all modules and records. Developers with access to Users, Teams, and Roles cannot change a System Administrator's privileges.

- **Admin & Developer***:* The user granted this access type has both Administration and Developer privileges for the specified module. This allows the user to not only view and manage all records but also access administration and development tools available to manage the module. The user does not require team membership to view records in the module.

Administration tools available to module administrators with Developer access are as follows:

Module	Tool Group	Tools
Any Module	Developer Tools	Studio, Workflow, Dropdown Editor
Users/Teams/Roles	Users	User Management, Team Management, Role Management, and Password Management.
Products	Products & Quotes	Product Catalog, categories, Types, Manufacturers, Shipping Providers
Bug Tracker	Bug Tracker	Releases
Forecasts	Forecasts	Time Periods
Contracts	Contracts	Contract Types

For complete control over record access, you must set access control at both the module level and the field level. For example, if the field level access is set to "Read Only", and you want to restrict actions such as Edit and Delete at the record level, you must set access control at the module level.

All changes to roles such as changing role definitions, assigning, or revoking roles take effect when the assigned users log into Sugar after the change has been made.

Note: Because records are assigned to a team to take action, a user must not only belong to the appropriate role but also to the team assigned to a record in order to perform actions on that record. Admin users can view any record.

Sugar provides the following set of Admin & Developer roles for your use:

- **Customer Support Administrator**: This role has administrator and developer privileges for Accounts, Bug Tracker, Cases, Contacts, and Knowledge Base.

- **Marketing Administrator**: This role has administration and developer privileges for Accounts, Contacts, Leads, Campaigns, Targets, and Target Lists.

- **Sales Administrato**r: This role has administrator and developer privileges for Accounts, Contacts, Forecasts, Forecast schedule, Leads, Opportunities, and Quotes.

- **Tracker**: This role grants access permission to create and manage tracker reports. Users assigned to this role can view the Tracker page and its contents in the Home module, run pre-defined tracker reports, and create custom tracker reports, you will need to add them to this role.

Creating Roles

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

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

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

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

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

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

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

If you change the Access Type to Not Set:

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

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

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

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

Access: Not Set = Enabled

User Type: Not Set = Normal

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

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

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

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

o **Enabled**: Permits the user to view the module.

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

Actions: This setting lists the following actions:

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

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

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

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

- **List**: Grants permission to access the List Views in the module.

- **View**: Grants permission to view records in the module.

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

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

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

- None: Nobody can perform the action

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

To create a role

1. In the Actions list on the Roles Home page, click **Create Role**.

2. Enter a name and description for the role.

3. Click **Save** to create the role.

   The Edit View displays a list of available modules along with the action type.

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

5. To specify the access type, double-click the Access Type field corresponding to the module, and choose the desired option from the drop-down list.

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

7. To set field-level permissions, see "**To set field-level permissions for a module**".

8. To create the role, click **Save**; click **Cancel** to exit the page without saving your changes.

To set field-level permissions for a module

1. Select the role on the Roles Home page.

2. Select the module from the left pane.

   The current role permissions for the module display at the top and the module fields display below. A plus sign (+) next to a field name indicates grouped fields. For example, the Billing Street field also includes the city, state, postal code and country. The permissions that you set for Billing Street also applies to the other fields that are grouped with it. You can click the plus sign to view grouped fields.

3. To set permissions for a field, click **Not Set** and select one of the following options from the drop-down list:

   Read/Write. Permits role members to view and edit the field value.

   Read/Owner Write. Permits role members to view the field value and the record owner to view and edit the field value.

Read Only. Permits all users including record owners to only view the field value.

Owner Read/Owner Write. Permits only the record owner to view and edit the field value.

None. The field is hidden from all users.

4. Click **Save**.

Note: To restrict actions such as editing and deleting records, you will need to set access control at the module level.

Next, you need to assign users to the role. You can do this now or at a later time.

To assign users to a role

1. In the role's Edit View, scroll down to the Users sub-panel and click **Select**.

2. Select users from the Users list.

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

3. Click **Save**.

To manage roles

1. To view the role details, click the role name on the Role home page.

2. To edit the role, on the detail page, click **Edit**, revise the information, and click **Save**.

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

4. To delete the role, on the detail page, click **Delete**.

5. To view access permissions for a specific user, in the Actions list, select **List Roles by User** and select the user from the adjacent drop-down list.

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

To view roles for a user

1. In the Actions list of the Roles home page, click **List Roles by User**.

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

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

Password Management

As a System Administrator, you can use the Password Management section to create and manage passwords and password rules for users.

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

You can create and manage templates to send system-generated passwords and links to reset passwords. Sugar provides default email templates to send system-generated passwords and links to reset user-generated passwords. You can view these two templates when you select Email Templates from the Actions list of the Emails module. Sugar uses these templates unless you specify a custom template. For more information on creating and editing email templates, see "**Creating Email Templates**".

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

For security purposes, you can set an expiration date for user-generated password and system-generated passwords. When a password expires, you can send the user a system-generated link to the page where the person can create a new password. You can also set an expiration date for these page links.

Creating Password Rules

You can create password rules that specify password requirements for user-created password, such as minimum length, the number of characters, uppercase and lowercase letters, numbers, and special characters in passwords.

You can use regular expressions to specify characters and words that are not permitted in user-generated passwords. These rules display in the Change Password section of the User Settings page. Users will have to adhere to these rules to successfully change their passwords.

When you enable new password rules, they apply only to new passwords. Existing passwords will work, even if they do not meet the requirements of the new password rules. When users attempt to reset their password using the Forgot Password feature or on their User Settings page, they will need to create a password that meets the criteria of the new password rules.

Securing Access to Sugar

You can also enable the Login Lockout feature to lock users out of the system after a specified number of failed login attempts. The system restores the ability to log in after the specified time interval has elapsed. The system also displays an alert in the Detail View of the user's record to notify you that the user has been locked out.

As an additional precaution, you can enable Captcha validation to prevent automated programs from gaining unauthorized access to user accounts. To use Captcha

validation in Sugar, you will need to create an account with reCAPTCHA for your organization and obtain a public key and private key for your Sugar instance. You will need to enter these keys on the Password Management page. Navigate to the reCAPTCHA website at http://recaptcha.net/ and create the account. When you enable Captcha validation, the Captcha image displays in the Sugar Login window when a user clicks the Forgot Password link. The user must submit the characters from the image in order to receive the link to reset the password.

Enabling Authentication in Sugar

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

If your users are using the Sugar Plug-in for Microsoft Outlook, they will need to enter this key number in Outlook. The Sugar Plug-in for Microsoft Outlook uses this key to encrypt user passwords before forwarding them to Sugar for authentication. Sugar decrypts the password with the same key and forwards the user names and passwords to the LDAP server for authentication. If authentication is successful, the users are allowed to access Sugar through the Sugar Plug-in for Microsoft Outlook.

Note: When LDAP authentication is enabled, settings for Sugar password requirements, password reset, and password expiration are not applicable.

To specify and manage password settings

1. In the Users sub-panel of the Administration Home page, click **Password Managemen**t.

   The Password Management page displays on the screen.

2. You can specify the following information:

   Password Requirements. In this section, enter the minimum and maximum number of characters that passwords can contain. You can also specify more detailed requirements, such as uppercase and lowercase characters, numbers, and special characters that the password can contain.

   To enforce password rules, you can use regular expressions. Click **Show Advanced Options** to specify regular expressions. In the **Regex Requirement** field, enter specific characters and words that are not permitted in passwords. In the **Regex Description** field, you can enter a brief description of the Regex expression.

   Some examples of regular expressions in password rules are listed below:

   o   Sugar - The password cannot contain the word "Sugar".

   o   ([A-Za-z0-9])\1 - The password cannot repeat a letter or number consecutively; for example, "AA" or "88".

o   ([a-zA-Z]){4,}- The password cannot repeat any two consecutive letters. Repeat characters or letters must be separated by a number or a special character such as "%".

o   [\t] - The password cannot contain spaces and tabs.

o   [@#$] - The password cannot contain @, #, or $.

System-Generated Passwords

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

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

User Reset Password

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

Enable Forgot Password Feature. This option, which is enabled by default, enables users who forgot their passwords to use the Forgot Password link on the Login window to submit their user name and email address to Sugar. The system automatically sends them an email with a link to the page where they can reset their password.

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

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

Email Templates

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

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

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

Sugar creates the template and displays it in the Email Templates Home page. Select Email Templates from the Actions list of the Emails module to view available email templates.

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

User-Generated Password Expiration. In this section, you can specify whether the user-generated password expires or not.

You can select one of the options listed below. The last two options ensure that users change their passwords periodically for the security of your Sugar application.

> **None**. The password never expires.
>
> **Password Expires in**. The time period, in days, weeks, and months, after which the password expires.
>
> **Password Expires after logins** Enter the number of times a user can log into Sugar with the current password. When this number is met, the password expires and the user must specify a new password.

Login Lockout. In this section, you can specify how many times a user can unsuccessfully attempt to log in before being locked out of the system for security reasons, and when the lockout ends.

If you do not want to impose a lockout, select **None**. If not, select **Lockout users after unsuccessful login attempts** and enter the number of attempts a user is allowed. To enable login after a certain time period, select **Enable login again** after and enter the time period in minutes, hours, or days.

LDAP Support.

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

To enable LDAP authentication, check the **Enable LDAP** box, and enter the following information:

> **Server**. Enter the LDAP server name.
>
> **Port Number.** Enter the server's port number.
>
> **User DN**. Enter the user DN name; for example, ou=people, dc=example, dc=com.
>
> **User Filter**. Enter any additional parameters to apply when authenticating users. For example, `is_user_id=1`.
>
> **Bind Attribute**. Enter the attribute name that is used to bind the user's name in LDAP. For example, in openLDAP, the attribute name is `userPrincipleName`.
>
> **Login Attribute**. Enter the attribute name that is used to search for the user in LDAP. For example, in openLDAP, the attribute name is `dn`.

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

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

Group Name. Enter the group name; for example, `cn=sugarcrm`.

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

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

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

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

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

3. Click **Save** to save the settings; click **Cancel** to exit the page without saving the settings.

Sugar Connect

This section includes the following options:

- **Sugar Support Portal**
- **Sugar Updates**
- **Online Documentation**
- **License Management**

Sugar Support Portal

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

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

Sugar Updates

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

If you choose to check for Sugar updates automatically, you will be notified when new Sugar versions or updates are available. To perform a manual check, uncheck the

Automatically Check for Updates option and click **Check Now**. If you already have the latest version, the message "You have the latest version available" displays at the bottom of the panel.

Online Documentation

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

License Management

Use this option to manage Sugar licenses for your organization.

Sugar administrators also count towards the number of licenses purchased by an organization.

When you purchase Sugar, SugarCRM provides a Download Key number to download the application. During installation, you will need to enter the key number along with associated information, such as the expiration date. This information is displayed in the License Management sub-panel and you can edit it, if necessary. When you save the updated information, the system automatically checks it against the information in SugarCRM database. If the information in the SugarCRM database is different from what you entered, then it overrides your revised information. For example, if you change the expiration date, the system checks the SugarCRM database for the expiration date based on when you purchased the application. If that number is different, then the License Management panel will override your change with the expiration date stored in the SugarCRM database. If you feel the displayed information is incorrect, contact Customer Support.

Typically, licenses are purchased for one year. During this time, you will need to periodically re-validate the license information with SugarCRM. If you enable automatic checks for Sugar updates as described in "**Sugar Updates**", the system automatically re-validates the license information twice a week. However, if you have not enabled automatic Sugar updates or if you have a firewall, you will need to manually revalidate the license information once every three months. If the revalidation is successful, the system displays the date and time of revalidation in the License Validation sub-panel.

If you do not update the license when it expires, the system exhibits the following behavior:

The system displays a warning message stating that the license has expired and requesting the new license key. You have three months from the date of the warning to update the license information. If not, at the end of three months, Sugar displays a warning stating that a lockdown will occur in 30 days. If 30 days pass without license validation, the system locks the application.

Though users are locked out of the system, administrators can still log in to access the License Management section of the Admin page and enter the new license key.

To edit or update license information

1. In the Sugar Connect sub-panel, click **License Management** to view the License Properties page.

This page displays sections for License Management and License Validation.

2. In the License Management section, click **Edit** and enter information for the following fields:

    Download Key. The download key that you received from SugarCRM when you purchased the application.

    Expiration Date. The date when the license expires.

    Number of Users. The number of users the license allows.

    Number of Offline Client Licenses. This field is populated with the number of Offline Clients associated with your license key.

    Number of Concurrent Self-Service Portal Users. This field is populated with the number of Sugar Portal users associated with your license key.

    For more information on how your customers can use Sugar Portal, see the *Sugar Portal Installation and User Guide*. For information on editing Sugar Portal page layouts, see "**Sugar Portal**".

3. Click **Save** to save the information.

    When you enable automatic checks for Sugar updates, the system automatically revalidates the license when you save the information. The revalidation date and time display in the License Validation sub-panel.

    If automatic revalidation fails for any reason, check the proxy server configuration in the System Settings panel as described in "**Proxy Settings**". If you fail to resolve the problem, you will need to manually revalidate the license as described below.

To manually revalidate license information

1. To revalidate the license information, click **Re-validate** located above the License Validation panel.

    The system communicates with the License Validation server to validate your license.

2. If the system fails to connect with the License Validation server for any reason, use the **Manual Validation** link located at the bottom of the panel.

3. In the Manual Validation panel, click **Export Download Key** to export the *sugarkey.lic* file.

    The system displays the Opening sugarkey.lic dialog box.

4. Select **Save to Disk** to copy the *sugarkey.lic* file on your local machine and click **OK**. Your machine must have a browser and Internet access.

5. Go to *http://updates.sugarcrm.com/license* and submit the *sugarkey.lic* file for validation.

6. If validation is successful, the system prompts you to save the file.

    By default, the file is named *sugarvalidationkey.lic*, but you can change the name if necessary.

7. Log into your Sugar installation and navigate to Admin > License Management > Manual Validation.

8. Browse to the location of the *sugarvalidationkey.lic* file on your local machine and click **Import**.

   Sugar updates the validation status for the download key.

System

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

- **System Settings**
- **Scheduler**
- **Diagnostic Tool**
- **Upgrade Wizard**
- **Tracker**
- **Connectors**
- **Themes**
- **Shortcut Bar**
- **Backups**
- **Repair**
- **Currencies**
- **Locale**
- **View Offline Clients**
- **Sugar Feed**
- **PDF**
- **Mobile**

System Settings

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

User Interface

Use this section to configure the user interface.

To configure the user interface

1. Configure the following fields:

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

Prevent user customizable Homepage layout. Select this box if you want to prevent users from moving Sugar Dashlets on the Home page. However, users can still create additional Sugar Dashlets and pages.

Maximum number of Sugar Dashlets on Homepage. Enter the maximum number of Sugar Dashlets you want displayed on the Home page. Users will not be able to add more than the number of Sugar Dashlets that you specify. The default value is 15.

Display server response times. This option is enabled by default. The footer on every page displays the time taken to respond when users attempt to perform an action, such as logging in or opening an item, in Sugar. Deselect this option if you do not want to display the response time.

System Name. This field displays your system name.

Current Logo. This field displays your organization's logo that currently displays in the User Interface.

Select Logo. Enter the path to the location of the logo that you want to upload from your local machine. Or, click **Browse** to navigate to the location of the logo on your local machine. The dimension should be 212 X 40, with the standard transparent background color, in PNG or JPG format.

Subpanel items per page. Enter the maximum number of records you want displayed in the List View. The system paginates lists that contain more than the specified number of records.

Subpanel items per page (Mobile). Enter the maximum number of records you want displayed in the list view when users log into Sugar from a wireless device. The default is three records per page. The system paginates lists that contain more than the specified number of records.

Prevent user customizable subpanel layout. Select this box if you want to prevent users from dragging and dropping sub-panels to a different location in their Detail View layout.

Show Full Name. Select this box if you want the full name for users displayed instead of their login names.

Use module icon as favicon. Select this option if you want to display the module icon in the browser's navigation tab instead of the Sugar icon, which is the default. For example, when you are in the Accounts module, the navigation tab will display the Accounts icon.

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

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

Proxy Settings

If you are using a proxy server to connect to the web, you will need to enter the information here to allow the system to check for Sugar updates and to validate license keys as described in "**License Management**".

1. Configure the following fields:

Use proxy server. If you want to connect to the web through a proxy server, select this option.

The system displays fields to specify the proxy host and port number.

Proxy Host. Enter the name of the proxy server host

Port. Enter the port number for the proxy host.

Authentication. Select this box if you want to enable proxy authentication to allow Sugar to connect to the company's proxy server.

User Name. Enter the user name.

Password. Enter a password for the user.

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

Customer Self-Service Portal

Select this option to integrate your organization's self-service portal with Sugar. This enables your customers to access Sugar records such as Notes and Cases.

1. Select the **Enable self-service portal integration** box.

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

SkypeOut

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

To enable Skype

1. Select the **Enable SkypeOut integration** box.

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

Mail Merge

If your users have installed the Sugar Plug-in for Microsoft Word, this option allows them to perform a mail merge with Word documents. For example, you can merge contact information from Sugar with form letters created in Microsoft Word. The Mail Merge link displays at the top of a List View.

Note: Users must also select the Mail Merge option on their User Settings page.

1. Select the **Enable mail merge** box.

2. To save the setting, click **Save**.

To restore the previous setting, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

Default Offline Client Status

Enable this option if you would like all users to use the Sugar application on their local machines without connecting to the Sugar server. If not, you can enable specific users to use the Offline Client.

Advanced

1. Select any of the following advanced configuration options:

   Validate user IP address: For security purposes, select this option to validate the IP addresses of users who log into Sugar.

   Log slow queries. Select this option to log the system's slow responses to user queries in the *sugarcrm.log* file. This information is for performance tuning investigation.

   Maximum upload size. Enter the maximum file size, in bytes, that users are allowed to upload.

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

   Portal Session Timeout. Enter the maximum time, in seconds, for a Sugar Portal session. The session will timeout when the time limit is reached.

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

   Slow query time threshold. Specify a threshold, in milliseconds, to define slow queries. Queries that take longer than the threshold time are logged in the *sugarcrm.log* file. This information is for performance-tuning investigation. If you have enabled the Tracker Queries option on the Tracker Settings page, you can run the pre-defined Slow Queries report to view slow queries.

   Display stack trace of errors. When you select this option, if an error occurs when users are running the application, the system displays where the error occurred in the application's stack trace. This information is for debugging purposes.

   Developer Mode. Select this option to disable caching so that you can immediately view changes made to language, vardefs, and template files.

   vCal Updates Time Period. Select this option to specify the number of months in advance of the current date that Free/Busy information for calls and meetings is published. The minimum value is one month, and the maximum value is 12 months. To turn off Free/Busy publishing, enter "0".

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

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

Logger Settings

The Sugar Logger logs events that occur in the Sugar application. By default, the logs are written to *sugarcrm.log* in the Sugar root directory.

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

You can, however, change the settings if necessary.

The logging levels are as follows:

- **debug**: Logs events that would help to debug the application.
- **info**: Logs informational messages.
- **warn**: Logs potentially harmful events.
- **error**: Logs error events in the application.
- **fatal**: Logs severe error events that leads the application to abort. This is the default level.
- **security**. Logs events that may compromise the security of the application.
- **off**. The logger will not log any events.

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

To configure logger settings

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

   Log File Name. Specify a name for the log file.

   Extension. Enter the file extension. The default is.log.

   Append After File Name. From the drop-down list, select a time period to append to the file name. This makes it easier to identify the log that you want to view.

   Maximum Log Size. Specify the maximum size of the log file in MegaBytes (MB). The default is 10MB.

   Log Level. From the drop-down list, select the event level that you want to capture in the log file. The default is fatal.

   Default Date Format. Enter the default date format for the log file. This format must be supported by strftime. The default is %c.

   Maximum Number of Logs. Specify the maximum number of log files to save. When the number of log files exceed this limit, Sugar deletes the log file that was created first. The default is 10 logs.

   Configure Log Settings. Select this option from the Actions list to view the system log.

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

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

To configure log settings

1. On the System Settings page, select **Configure Log Settings** from the Actions list.

1. Click **All** to view the whole log.

2. Click **Mark Poin**t to show the log from that point onward. When you click **Refresh From Mark,** the log displays actions that occurred since the time you clicked Mark Point.

3. To search the log by keyword, enter it in the Search box; to search the log by a regular expression, enter it in the Search box and check the **Reg Exp** box. Press **Enter** on your keyboard to search the log.

Note: The Ignore Self field is not used.

Scheduler

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

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

You can schedule the following types of job:

Prune Tracker Tables.This job removes entries from the tracker and tracker_sessions database tables if they are older than the number of days specified on the Tracker Settings page.

Check Inbound Mailboxes. This job monitors inbound emails in active mail accounts that you set up using the Inbound Email option in the Email panel of the Admin page.

Run Nightly Process Bounced Campaign Emails. This job polls any mail account in which, the "Possible Actions" parameter is set to "Bounce Handling". This is an essential component of monitoring mass email campaigns.

Run Nightly Mass Email Campaigns. This job processes the outbound email queue for your organization's mass campaign emails.

Prune Database on 1st of Month. This job reads all the tables in your Sugar database, finds records that have been soft-deleted (deleted = 1), creates a large SQL file, and physically deletes those records on the 1st of every month. It is mostly a performance job, and is not essential to the use of Sugar. The backup files are placed in *cache/backups* with time-stamped filenames.

Process Workflow Tasks. This job processes workflow events. If you set a timed trigger for an event, for example, when a lead is a week old, then it finds the predefined workflow actions and fires them when appropriate.

Run Report Generation Scheduled Tasks. This job runs reports and emails them to the assigned user as per the schedule specified for a given report. The reports are sent to the user through an email from a PHP script that runs at regular intervals to send out the emails at the appropriate time. The user can choose which reports to

receive and how often to send the reports in the Reports module of the Sugar application.

Update Tracker Session Tables. This job sets all active entries in the tracker_sessions table to be inactive if they are older than 20 minutes. The tracker_sessions table keeps track of the current number of users logged into the system and the time of their most recent activity. A user session will be marked as inactive if the user has not registered a tracker entry in the past 20 minutes.

Configuring Settings for Scheduler Jobs

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

To add a new cron job to your crontab for Unix and Linux Systems

1. At the command prompt, type `crontab -e`.

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

   `*   *   *   *   * cd /`**`path/to/sugar;`** `/`**`path/to/php`** `-c/`**`path/to/php.ini`** `-f cron.php /dev/null 2>&1`

   where:

   `path/to/sugar` is the path to where your Sugar installation resides.

   `path/to/php` is the path to the PHP installation that you want to use.

   `path/to/php.ini` is the path to the PHP configuration file that you want to use.

3. Save your changes and close.

If you encounter problems, do the following:

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

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

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

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

2. Determine the capabilities of your PHP installation.

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

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

   Search for the PHP binary as follows:

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

      Or

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

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

3. Create a cron job for the Apache user

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

b. Enter the following line to your crontab:

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

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

For example, to run the cron job every three minutes, enter:

```
"*/3   *   *   *   *   cd /path/to/sugar; php -f cron.php>
/dev/null 2>&1
```

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

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

b. If your cron job looks as follows:

```
*   *   *   *   *   cd /var/www/html/sugarcrm; path/to/php -f
cron.php > /dev/null 2>&1
```

Enter the command from "cd.." to "2&>1" into a terminal and press **Enter**.

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

5. Save your changes and close.

To add a new cron job to your crontab for Microsoft Windows (2000, XP, Server)

Set up the Windows batch file as follows:

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

2. Enter the following paths in the batch file:

o `cd c:\path\to\Sugarinstance`

where **SugarInstance** is your Sugar installation.

This folder should contain the *cron.php* file.

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

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

4. If you encounter problems, do the following:

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

For the 5.2x version of PHP, the PHP-CGI binary is named *php-cgi.exe* (*not* php-cli.exe) and is typically located in the root folder of your PHP install folder. To allow it to interact with the dynamic libraries, specify the location of the *php.ini* file. This can vary from system to system. If you are unsure, enter the command described above.

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

5. Create the batch file.

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

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

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

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

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

6. Test the batch file.

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

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

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

7. Create a scheduled task.

   a. Click **Start** and navigate to Control Panel/Scheduled Tasks/Add Scheduled Task.

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

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

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

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

8. Save your changes and close the Wizard.

To schedule a job

1. In the Actions list of the Scheduler home page, click **Create Scheduler**.

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

   Job Name. Enter a name for the job.

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

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

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

The default is every one minute daily.

3. For advanced options, click the **Advanced Options** link below the Job field.

The Advanced Options sub-panel displays below.

4. Enter information for the following fields:

Execute If Missed. Select this box to run any jobs that the scheduler missed.

Date & Time Start. Click the Calendar icon and select the start date for the job; select the time, in hours and minutes, from the adjacent drop-down list.

Date & Time End. Click the Calendar icon and select the end date for the job; select the time, in hours and minutes, from the adjacent drop-down list.

Active From. From the drop-down list, select the time, in hours and minutes, when the job becomes active.

Active To. From the drop-down list, select the time, in hours and minutes, when the job becomes inactive.

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

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

To manage scheduled jobs

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

The Schedule List page displays on the page.

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

3. To edit the settings, click **Edit**.

4. Make the necessary changes and click **Save** to update the settings; click **Cancel** to exit the page without saving your changes.

Troubleshooting Tips

Linux

1. The Sugar Scheduler fails to run even though the *cron.log* file shows that the crontab is triggering the new job.

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

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

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

   o The Apache user's PATH does not include the location of the *php.ini* file, and thus the external libraries (such as *mod_mysql* and *mod_imap*) are unavailable at run time.

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

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

2. No PHP binary found or it is broken.

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

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

   If you use *cURL*, your crontab entry should look as follows:

```
*  *  *  *  *  curl --silent http://Domain/
sugarInstance/cron.php
```

   where **Domain** is the website where your Sugar installation resides, and **sugarInstance** is your Sugar installation.

   If you use *wget*, your crontab entry should look like:

```
*  *  *  *  *  wget -q http://Domain/sugarInstance/
cron.php
```

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

Windows.

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

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

```
phpinfo();
```

   The system identifies the *php.ini* file and its location.

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

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

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

   c.   The pertinent entry is "`extension_dir`".

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

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

   Necessary extensions are disabled.

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

   g.   Find the section named "Dynamic Extensions".

   h.   Scroll down to the Windows-specific list.

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

j. Test the batch file again.

Diagnostic Tool

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

To capture system configuration

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

   The system displays a list of system configuration files. By default, the system captures configuration information for all the selected files.

   The system performs the following actions of these files:

   SugarCRM Config.php - Copies the *config.php* file from the root directory after replacing the DB password with an asterisk for security purposes.

   SugarCRM Custom directory - Copies the custom directory to a zip file to enable Customer Support to know what has been customized through the Layout Editor.

   phpinfo() - Executes `phpinfo` and stores it in a file.

   MySQL - Configuration Table Dumps - copies a few tables from the database and replaces sensitive information with an asterisk for security purposes.

   MySQL - All Tables Schema - writes the schema for all tables to an HTML file.

   MySQL - General Information - Pulls up some general information, like MySQL version, character sets, etc.

   MD5 info - Runs md5 checks on all files in the sugar directory and compares it against a stock Sugar installation's md5s. This enables Customer Support to learn which, if any, files have been manually customized.

   BeanList/BeanFiles files exist - If a custom module has been loaded, and the author did not define these references correctly, it can cause problems. This action checks all the references to ensure they are correct.

   SugarCRM Log file - copies the log file.

   Sugar schema output (VARDEFS) - copies the Sugar database schema.

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

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

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

4. If you choose to download the file, the File Download dialog box displays on the page. To view its contents, click **Open**, and click the file you want to view. To save the zip file contents, click **Save**, and select a location on your local machine.

Upgrade Wizard

When you obtain the Sugar upgrade zip file from Sugar, you can save it to your local machine and upload it into Sugar using the Upgrade Wizard. For more information, see "**Upgrading Sugar**".

Backups

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

To backup Sugar configuration files

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

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

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

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

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

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

Repair

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

The options are listed below.

Quick Repair and Rebuild: Repairs and rebuilds the database, extensions, vardefs, Sugar Dashlets, and so on for selected modules. Click this option, select the modules you want to repair, and click **Repair**. You also use this option to clear any custom Sugar Feed link types from the cache.

Upgrade Teams: Scans all users to ensure that they each have a personal team, and that they are members of the global team, automatically fixing any discrepancies after an upgrade. It may also be useful to restore the private teams for all users in the event they become corrupted or are removed for any reason.

Expand Column Width. Expands certain char, varchar, and text columns in MSSQL database.

Rebuild .htaccess file: Rebuilds the *.htaccess* file to limit access to certain files directly.

Rebuild Config File: Rebuilds the *config.php* file by updating the version and adding defaults when not explicitly declared. Click this option to check the file and if, necessary, click **Rebuild**.

Rebuild Extensions: Rebuilds extensions including extended vardefs, language packs, menus, and administration

Rebuild Relationships: Rebuilds relationship metadata and drops the cache file.

Rebuild Schedulers: Rebuilds your default Scheduler Jobs. Click this option and then click **Rebuild**.

Rebuild Sugar Dashlets: Rebuilds the cache file for Sugar Dashlets.

Rebuild Workflow: Rebuilds the workflow cache and compiles plug-ins.

Rebuild Javascript Languages: Rebuilds Javascript versions of language files.

Rebuild JS Compressed Files: Copies original Full JS Source files and replaces existing compressed JS files.

Rebuild JS Grouping Files: Re-concatenates and overwrites existing group files with latest versions of group files.

Rebuild Minified JS Files: Copies original Full JS Source Files and minifies them, then replaces existing compressed files.

Repair JS Files: Compresses Existing JS files - includes any changes made, but does not overwrite original JS Source files.

Repair Non-Lowercased Fields: Repairs mixed-case custom tables and metadata files to fix issues where code expects lowercase field names.

Repair Teams: Rebuilds private team membership based on user reporting hierarchy. Click this option, select one or all of the following: Global team, Private team, and team hierarchy, and click **Rebuild**.

Repair Roles: Repairs roles by adding all new modules that support access control as well as any new access controls to existing modules.

Repair Inbound Email Accounts: Repairs Inbound Email accounts and encrypts account passwords.

Remove XSS: Removes XSS Vulnerabilities from the database. Click this option, select a module, and click **Execute**. If any XSS strings are found, the system lists them in the Object(s) found field below **Repair Database**: This option is applicable to MYSQL databases only. It repairs your Sugar database based on values defined in the vardefs. You can choose to display the SQL that will be executed on the screen, export it, or execute it.

Repair Activities: Repairs Activities (Calls, Meetings) end dates.

Check Reports: Checks whether reports are still valid after an upgrade and lists any invalid reports that are found during the check.

Enable/Disable Seed Users: Enables or disables seed users populated during demo installation. Click this option, and if the seed users are enabled, click **Deactivate** to disable them. If the seed users are disabled, click **Activate** to enable them.

Repair Oracle VARCHAR2 Columns: Changes the semantics of VARCHAR2 columns from byte to char. This is necessary for UTF-8, MBCS support.

Currencies

Use this option to define a new currency and rate.

For each new currency that you define, enter the name, symbol (for example, $), conversion rate to the US $, the currency code (such as CDN for the Canadian dollar). Set the Status to **Inactive** if you do not want users to use this currency for transactions.

Note: To display the Euro symbol in charts, you will need to install Macromedia Flash8.

Locale

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

User Interface: Use this section to set the default values in the Sugar User Interface.

Default Date Format. From the drop-down list, select a date format for all records such as Quotes and Contracts. Users can override the default format by setting a different date format in their User Settings page.

Default Time Format. From the drop-down list, select a time format to display in all records such as Cases. Users can override the default format by setting a different time format in their User Settings page.

Default Language. From the drop-down list, select the default language for the Sugar User Interface. Users can select a different language from the login page, provided they have installed the appropriate language pack.

Default Name Format. Enter the default salutation and name format to display in list views and detail views. You can specify any combination of salutation first name, and last name. For example: Mr. John Smith, Mr. Smith, or John Smith. Users can override the default format by setting a different time format in their User Settings page.

Default Currency. Use this section to override the default currency that you set during installation. On the User Settings page, users can override the default currency that you specify in this panel.

Currency. Enter the name of the currency that your organization uses to conduct business.

Currency symbol. Enter the symbol for the currency.

ISO 4217 Currency Code. Enter the ISO code for the currency.

1000s Separator. Specify a delimiter to separate thousands when users specify a numeric value for the amount.

Decimal Symbol. Specify a default decimal symbol.

Export Settings

Use this panel to specify export settings such as the delimiter used to separate data in export files, and the default character set used to export data from Sugar. The

settings you specify here apply to all users in the organization. However, users can define a different default export character set on their User Settings page to export data from Sugar.

This character encoding is also used when importing data into Sugar.

By default, Sugar uses UTF-8 to store and export data. For locales that use character encoding other than UTF-8, you must specify the appropriate default character set. This ensures that the character set Sugar uses to create the exported file is mapped to the correct character set on the user's machine. For example, MS Windows uses SJIS in Japan. So, for users in this locale, you will need to select SJIS as the default export character set.

By default, both users and administrators can export files from Sugar. However, you can prevent users from exporting files.

Export Delimiter. Specify the delimiter, such as a comma or a period, to use while exporting data.

Default Character Set for Import and Export. The default is UTF-8. For locales other than US and Western Europe, select the appropriate character set from the drop-down list.

Disable export. Select this option if you want to prevent end users and users with administrative privileges from exporting data.

Admin export only. Select this option to allow only users with administrative privileges to export data.

Database Collation

Sugar displays this sub-panel only if you are using the MYSQL database. This setting manages the connection layer between SugarCRM and your MySQL database, and should be set to match the collation of your database tables. You can select the desired collation order from the drop-down list. The default is `utf8_general_ci`. Changing this setting will not alter your existing tables, and all new tables created after this change will inherit the "collation setting" name.

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

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

Tracker

Use this option to enable the system to track user actions and other information for Sugar modules, including custom modules.

Sugar uses this information to create tracker reports. For information on tracker reports, see "**Viewing and Creating Tracker Reports**".

By default, all tracker settings are disabled.

To configure tracker settings

1. Select the appropriate box to enable one or more of the following options:

Tracker actions. Enable this option to track user actions such as modules accessed on a particular day and the actions performed in those modules such as viewing or editing records. Sugar records tracker actions in the database. You can run a trackers report to view this data.

Tracker sessions. Enable this option to track a user's session data such as session round trips, start and end dates.

Tracker performance. Enable this option to track performance-related information such as database access, file access, server response time, and memory usage.

Tracker queries. Enable this option to track SQL queries that exceed the `slow_query_ time msec` limit set in the *config.php* file. If the Log Slow Queries option is enabled on the System Settings page, then any query exceeding the number of milliseconds defined in this setting will be logged in the database. The queries tracked will substitute the runtime SQL values with the '?' character so that the SQL pattern is treated as a single slow query entry.

Log Slow queries. Enable this option to log slow queries. This information is for performance-tuning investigation. If you have also enabled the Tracker Queries option, you can run the pre-defined Slow Queries report to view slow queries.

Number of days of Tracker data to store when Scheduler prunes the tables. Enter the number of days of data to be retained after the Prune Tracker Tables scheduler is run.

Slow query time threshold. Specify the threshold, in milliseconds, that defines slow queries. Queries that take longer than the threshold time are logged in the *sugarcrm.log* file. This information is for performance-tuning investigation. If you have also enabled the Tracker Queries option, you can run the pre-defined Slow Queries report to view slow queries.

2. Click **Save** to save the settings.

Note: In order to obtain data on memory usage, your PHP system must support the `memory_get_usage` function.

View Offline Clients

Use this option to view and manage any Offline Clients that you have enabled for one or more users.

For information on installing and setting up the Sugar Offline Client, see the *Sugar Offline Client Installation Guide*.

You can change the status of an offline client in the Set Status column in the Offline Clients list. To change the status of multiple offline clients or to delete them, use the Mass Update sub-panel.

Sugar Feed

Select this option to enable the Sugar Feed functionality for your organization. Sugar Feed enables users to be informed as soon as a team member creates a new contact, lead, opportunity, or case. Team members are also notified of status updates when a

lead is converted, when a case is closed, and when an opportunity is closed. When a user performs any of these actions, Sugar displays a message in the My Sugar Feed dashlet on the Home page of team members.

You can activate Sugar Feed for one or more of the following modules: Leads, Cases, Opportunities, and Contacts.

Additionally, you can enable User Feed to allow users to post status updates, external links, images, and YouTube videos. Your organization can also create custom link types. These posts can be viewed only by members of the specified team.

To enable and manage Sugar Feeds

1. In the System sub-panel, click **Sugar Feed Settings**.

   The Sugar Feed Settings page displays on the screen. Specify the following settings.

   Enable Sugar Feed. Select this option to enable this functionality for users in your organization.

   Activate Feeds For: To activate Sugar Feed for a module, select the checkbox appropriate for the module.

   Activate User Feed. Select this option to enable users to post status updates, images, links, and YouTube videos.

2. Click **Save** to save the settings. To delete all existing entries in the Feed, click **Delete Feed Entries** and click **OK** to confirm your action.

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

Themes

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

To manage themes

1. Navigate to the System section of the Administration Home page, and click **Themes Settings**.

   The Themes Settings page displays available themes on the screen.

2. To disable a theme, click the Right arrow to move it from the Enabled list to the Disabled list; to enable a theme, click the Left arrow to move it from the Disabled list to the Enabled list.

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

Shortcut Bar

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

To enable or disable Quick Create forms for a module

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

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

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

Connectors

Use this option to manage Sugar cloud connectors to external data sources. Connectors are enabled by default to allow users to search external data sources for new information from within a Sugar record in the module. Users can view the external data or merge it with the existing information in the Sugar record. For example, they can update addresses and phone numbers for an account. For information on merging data, see "**Integrating Data from External Sources**". You can disable connectors, if needed.

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

Sugar provides connectors to Hoover's, Zoominfo-Person, Zoominfo-Company, and LinkedIn. Developers in your organization can create connectors to other data sources, and you can upload them into Sugar using the Module Loader. You can also search for other available connectors on Sugar Forge at http://www.sugarforge.org and Sugar Exchange at http://www.sugarexchange.com.

You can specify the connector fields to use when searching a data source, as described in "**Setting Connector Search Fields**".

You can also map connector fields to fields in Sugar as described later in this section.

To configure connector properties

1. Navigate to the Systems section of the Administration Home page, and click **Connector Settings**.

2. The Connector Settings page displays on the screen.

3. Click **Set Connector Properties**.

   The Set Connector Properties page displays tabs for the connectors that Sugar provides. Tabs for any other connectors that you install also display on this page.

   If you have obtained API keys for Hoover's and Zoominfo, enter them on this page to activate these connectors. If you have not obtained them, it is

recommended that you do so. If you do not enter the API keys for these connectors, Sugar uses a default key, which does not display on the screen.

For LinkedIn, no API key is required. However, users must be logged into LinkedIn using their LinkedIn account in order to view LinkedIn data within Sugar.

Hoover's also require a WSDL URL. This is the location of the Web Service Definition Language needed to create the client objects that allow Sugar to communicate with the data source's Web Services.

Hoover's connector tab displays the following fields:

o **Endpoint URL**. This is the location that services your SOAP calls. The Endpoint URL for Hoover's is http://hapi.hoovers.com/axis2/Hapi.wsdl.

o **WSDL URL**. The WSDL URL for Hoover's is:

http://hapi.hoovers.com/axis2/Hapi.wsdl.

o **API key**. This field displays the introductory API key for Hoover's. You will need to replace this with the API key that you obtain from Hoover's.

Zoominfo-Person connector tab displays the following fields:

o **Person Search Query URL**: This is the location that services your SOAP calls while searching for individuals by name or email address.The URL for Zoominfo-Person is:

http://api.zoominfo.com/PartnerAPI/ XmlOutput.aspx?query_type=people_search_query&pc=

Person Detail Query URL: This is the location that services your SOAP calls while searching for details about a person such as the job title, company name, company phone number, company address, and a brief biography. The URL for Zoominfo-Person is:

http://partners.zoominfo.com/PartnerAPI/ XmlOutput.aspx?query_type=person_detail&pc=

o **Partner Code:** Enter the Partner code that you obtained from Zoominfo.

o **API Key**. This field displays the introductory API key for Zoominfo-Person. You will need to replace this with the API key that you obtain from Zoominfo.

The Zoominfo-Company connector tab displays the following fields:

o **Company Search URL**. This is location that services your SOAP calls while querying for company names. The URL is:

http://api.zoominfo.com/PartnerAPI/ XmlOutput.aspx?query_type=company_search_query&pc=

o **Company Detail URL**.This is location that.services your SOAP calls while searching for company-specific information. The URL is:

http://api.zoominfo.com/PartnerAPI/ XmlOutput.aspx?query_type=company_detail&pc=

o **Partner Code**: Enter the partner code that you obtained from Zoominfo.

o **API Key**. This field displays the introductory API key for Zoominfo-Person. You will need to replace this with the API key that you obtain from Zoominfo.

4. If a connector's URL has changed, enter the new URL in the appropriate field.

5. To ensure that data source is correctly configured, click **Test Connector**.

 If the configuration is correct, Sugar displays a message stating that the test was successful.

6. Click **Save** to add the settings; to exit the page without saving the changes, click **Cancel**.

To enable or disable connectors

1. On the Connector Settings page, click **Enable Connectors**.

 This page displays tabs for the available data source connectors. Each tab displays a column for connector-enabled modules and a column for connector-disabled modules. By default, connectors are disabled for all modules.

2. To enable a connector for a module, on the connector tab, drag the module from the Disabled list to the Enabled list.

 To disable a connector for a module, on the connector tab, drag the module from the Enabled list to the Disabled list.

3. Click **Save** to saving the settings.

Setting Connector Search Fields

You can choose the fields by which users can search a data source. However, your choices are limited by the Search parameters that the data source supports. The table below lists the supported and default Search fields for Hoover's, and Zoominfo.

Data Source	Supported Search Fields	Default Search Fields
Hoover's	Company Name, State, City, Country, Postal Code	Company Name
Zoominfo-Person	First Name, Last Name, Company Name, Email Address, Current Job Company Name, College/University. **Note**: The Company Name field serves as an additional filter for the convenience of filtering the results based on company name. But the Company Name field will not work by itself. The First Name, Last Name, and/or Email Address search values should be provided in conjunction with the Company Name.	First Name, Last Name, Email Address, Current Job Company Name
Zoominfo-Company	Company Name, Country, Postal Code, State	Company Name, State, Company.

Note: The connector search results depends on the Search rules set by the data source provider.

To select connector search fields

1. On Connector Settings page, click **Manage Connector Search**.

   Each connector tab displays separate lists of connector fields for each connector-enabled module.

2. To use a field in Connector Search for a module, drag it from the Available list to the Default list.

3. Click **Save** to save the settings.

   Users can view the selected fields in the module's Search sub-panel on the Data Merge page.

Mapping Connector Fields

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

For each data source, you can map a module field to one connector field. The connector fields that appear in the Data List View are determined by which connector fields are mapped. However, some of the connector fields display data in the Data Merge form but not in the List View. Other connectors may or may not display data in the List View or 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

To map connector fields

1. On the Connector Settings page, click **Map Connector Fields**.

    Each connector tab displays a list of fields in the connector and a corresponding drop-down list of fields in connector-enabled Sugar modules.

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

3. Click **Save** to save the mappings.

    Sugar uses these field mappings when merging data.

Note: Developers in your organization can customize the Sugar code to change the order in which connectors are prioritized when using the Smart Copy feature during data merge. Currently, your developers can manually edit the *display_config.php* file located in *custom/modules/Connectors/metadata*. In this file, the connectors are grouped by the modules for which they have been enabled. The connectors for each module are listed in the order that they will appear on the Data Merge screen.

If a data source connector supports pop-up windows to display data, then Sugar also uses these field mappings to determine which fields display the pop-up window for the data source. For example, the mapped field for LinkedIn displays the LinkedIn icon. When users point the cursor at this icon, a pop-up window displays the LinkedIn data for the field.

PDF

Use this section to configure settings for PDF files of reports and quotes. These settings display in the Document Properties window of the PDF file when you select Properties from the File menu. Administrators can specify other settings such as the logo, keywords for search, and document title.

By default, the page orientation for report PDFs and project PDFs is set to Landscape. The page orientation for quote PDFs is set to Portrait. Developers in your organization can change these configurations, if needed. Users can configure the default font type and size for PDFs from the User Settings page.

You can add additional fonts for PDF files. To do this, you will need to create a package containing the required fonts and load it into Sugar using the Module Loader.

To configure PDF settings

1. In the Document Properties section, you can configure the following settings:

    Title. Enter the title of the document.

    Subject. Enter the subject of the document.

    Author. The name of the user who created the PDF file.

    Keyword(s). The keywords associated with the document to help users find the document when they perform a keyword search.

2. In the Images section, you can configure the following settings:

Select New Image for Quotes. The default image that displays on this page is the logo that you specify in System Settings. Click **Browse** to select a different header logo for quotes.

Select New Image for Reports. The default image that displays on this page is the logo that you specify in System Settings. Click **Browse** to select a different header logo for reports.

Note: You must install the PHP GD library to successfully upload images in PNG format.

3. Click **Save** to save your settings; click **Restore** to revert to default settings; click **Cancel** to exit the page without saving your settings.

Generating Fonts for Quote PDFs

To enable users to create PDF versions of quotes and email them to customers directly from the Quotes detail view, you must ensure that the correct fonts are installed and specify the appropriate character set from the Import/Export Character Set drop-down list in the User Settings page. 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.

For other languages such as Japanese, you will have to create the appropriate font.

To generate a font for PDF files

1. Use a program such as Font Forge to generate PS Type1/Binary font of *.afm* (Adobe Font Metrics) type.

2. Copy the file into *sugarcrm/include/fonts*.

3. Navigate to the layout directories located in *sugarcrm/modules/Quotes/ layouts/* or *sugarcrm/custom/modules/Quotes/layouts/*.

4. In any layout file such as Invoice, Standard, and Custom Layout, find the parameter "`$font=include/fonts/`***FontName***" where ***FontName*** is the name of the font that you generated.

5. Save the file.

6. On the User Settings page, select the appropriate character set for the chosen language.

7. Generate a quote PDF to ensure that the settings are correct.

Mobile

Use this section to enable or disable Sugar modules for Sugar Mobile. Sugar Mobile enables users to access Sugar modules, including custom modules within a web browser on a smartphone or PDA.

You can customize the mobile view layout from Studio. For more information, see "**Studio**".

To manage mobile settings

1. Select **Mobile Settings** from the System section.

   On the Mobile Settings page, modules that are enabled by default are listed in the Enabled column. Modules that are not enabled are listed in the Disabled column.

2. In the Listview items per page (Mobile) field, you can change the number of records that display per page in List View on a mobile device. The default is 10 records per page.

3. In the Subpanel items per page (Mobile) field, you can change the number of related records that display in a sub-panel in Detail View. The default is three records per page.

4. To enable a module for Sugar Mobile, drag it from the Disabled column to the Enabled column.

5. To disable a module for Sugar Mobile, drag it from the Enabled column to the Disabled column.

6. Click **Save** to save the settings; click **Cancel** to exit the page without saving the settings.

Email

Administrators can set up and manage mail accounts for inbound and outbound emails, including campaign emails, using the following options:

- **Email Settings**
- **Inbound Email**
- **Campaign Email Settings**
- **Email Queue**

Email Settings

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

To configure email settings

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

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

   To add Google's Gmail server, click **Prefill Gmail Defaults**. The system fills in the SMTP Server and SMTP Port fields with the Gmail server's address and port number respectively.

   From Name. Enter the sender's name; for example, the name of your organization.

   From Address. Enter the sender's email address.

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

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

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

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

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

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

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

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

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

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

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

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

Inbound Email

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

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

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

Creating Cases from Emails. When you create a group mail account, you can set it up to automatically generate cases from inbound emails. When the case is created, it is assigned to a team and an email notification is sent out. The email's subject line is

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

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

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

To set up a Group mail account

1. In the Actions list, click **New Group Mail Account**.

   Sugar displays the Group Mail Account page on the screen.

   In the Mail Account Information section, enter information for the following fields:

   Name. Enter the user's name, or an alternate name for the mail account.

   Mail Server Address. Enter the address of the external mail server.

   Mail Server Protocol. From the drop-down list, select IMAP. Additional fields display on the screen to select the folder you want to monitor, a Trash folder to store deleted emails, and a Sent folder to store copies of outgoing emails.

   > **Monitored Folders**. This field displays when you select IMAP as the protocol. By default, the system monitors the Inbox. To monitor other folders, click **Select** to view a list of available folders in the external mail account. To select multiple folders, hold down the Shift key or the Ctrl key. After you select the folders that you want to view in Sugar, click **OK** to view them in your inbox.

   > **Trash Folder**. To select a Trash folder from the Folders list, click **Select.** After you specify the trash folder, click **OK**.

   > **Sent Folder**.To add a folder to view your outbound emails, click **Select.** After you specify a folder, click **OK**.

   Status. From the drop-down list, select **Active** to activate the Group mail account or **Inactive** to deactivate it. Users cannot view emails from a deactivated account.

   User Name. Enter the username to access the mail server.

   Password. Enter the user's password to access the mail server.

   Mail Server Port. Enter the server port number.

   Use SSL. If your mail server supports secure socket connections, selecting this box will force SSL connections when importing emails into Sugar.

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

   Assign to Teams. From the drop-down list, select the team that is permitted access to the Group mail account.

From Name. Enter the name of the person or company that will send the emails.

From Address. Enter the email address from which emails will be sent.

Reply-to Name. Enter the name to which you want replies to be addressed.

Reply-to Address. Enter the email address associated with the Reply-to name.

Import Emails Automatically. Select this option to automatically create email records in Sugar for all incoming emails.

Create Case from Email. Select this option to create cases automatically from inbound emails. When you select this option, you will need to specify how the emails are distributed in the Distribution Method field.

> **Distribution Method**. This field, which displays only when you select the Create Case option, allows you to select Round-Robin or Least-Busy. With the Round-Robin option, the system distributes cases evenly amongst all users within the specified team. With the Least-Busy option, the system distributes cases to the least busy user within the team assigned to the Group folder.

> **New Case Auto-Reply Template**. This field displays only when you select the Create Case option. You can use a Case Reply template to set up an automated response notifying email senders that a case has been created to resolve their issue. You can select an existing template from the drop-down list, or click **Create** to create a new template. The response contains the system-generated case number in the subject line of the email. The body of the email for which the case was created displays below the template text.

> For information on creating email templates, see "**Creating Email Templates**".

> **Leave Messages on Server**. This option, which applies to imported emails, displays only when you select a Group folder. Select **Yes** if you do not want to delete the emails from the external server when you import them into Sugar. Select **No** if you want to delete emails from the external server.

Auto-Reply Template. Use this template to set up an automated response notifying email senders that you received their email. From the drop-down list, select an existing template, or click **Create** to create a new one. If both templates are selected, Sugar will respond to the sender with the Create Case Reply template instead of the Auto-Reply template.

No Auto-reply to Domain. To exclude a domain from receiving the automatic email response, enter the domain name. It is common to specify your organization's domain to prevent auto-replies from being sent to your organization's members.

Number of Auto-responses. Set the maximum number of auto-responses to be sent to a unique email address during a period of 24 hours.

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

4. Click **Save** to save the settings.

   The system creates the mail account and displays its detail page.

To set up a bounce handing mail account

1. Select **New Bounce Handling Account** from the Actions list on the Inbound Emails Home page.

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

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

4. Click **Save** to save the settings.

   The system creates the bounce handling account and displays its detail page.

To manage group mail accounts and bounce handling accounts

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

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

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

- To duplicate an account, click **Duplicate** in the Detail View. The system creates a new mail account and displays the Edit View. Edit the details as needed and click **Save**.

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

Campaign Email Settings

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

To configure campaigns email setup from Campaigns module

1. In the Campaigns module, select **Email Setup** from the Actions list.

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

   From Name. Sugar display the name entered on the Email Settings page.

   Mail Transfer Agent. Select the mail transfer protocol from the drop-down list. SMTP is the default protocol.

   From Address. The email address for the sender.

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

SMTP Server. Enter the name of the SMTP server.

SMTP Port. The system displays the SMTP port number.

Use SMTP Authentication. To use SMTP authentication, check this box and enter the email account username and password in the fields that display below.

Enable SMTP over SSL or TLS: Select either SSL or TLS from the drop-down list.

In the Mass Mailing Options section, enter the information shown below. You can also enter this information using the Campaign Email Settings option on the Administration Home page.

Number of emails sent per batch. Enter the maximum number of emails to send per batch.

Location of campaign tracking files. Campaign tracking files log responses from campaign targets. If you are running Sugar on an external network, select **Default** to accept the default location. However, if your Sugar instance is behind a firewall, then choose **User Defined** and specify the path to your external Web server in the field below. Ensure that you create three custom files with the same name as the campaign tracking files, namely, *campaign_tracker/2.php*, *removeme.php*, and *image.php* and place them in the path to your external Web server. These files must point to the original campaign tracking files in your Sugar instance.

Keep copies of campaign messages. The Default is **No**. Selecting **No** will store only the template of the campaign message and the required variables to recreate the message.

Selecting **Yes** will save a copy of all email messages sent during all campaigns in the Sugar database. This takes up space in the Sugar database and slows down performance. Hence, it is strongly recommended that you use the default setting.

3. Click **Next**.

   The page displays existing bounce handling mail accounts.

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

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

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

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

To configure campaign email setup from the Administration page

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

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

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

3. Click **Save**.

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

Email Queue

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

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

To manage queued emails

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

   You can select more than one campaign at a time.

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

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

Developer Tools

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

- **Module Builder**
- **Module Loader**
- **Studio**
- **Sugar Portal**
- **Configure Tabs**
- **Configure Subpanels**
- **Rename Tabs**
- **Dropdown Editor**
- **Workflow Management**

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

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

You can add custom modules as Sugar Dashlets on your Home page. For more information on Sugar Dashlets, see "**Managing Sugar Dashlets**".

Module Builder

Use the Module Builder to create custom modules in Sugar. You can also make custom modules available for mobile views using the Mobile Settings option.

The process of creating a custom module is as follows:

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

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

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

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

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

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

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

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

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

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

4. Customize page layouts for List View, Edit View, Detail View, Sub-panels, Search form, and Sugar Dashlets, if necessary.

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

6. Save the package and distribute it.

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

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

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

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

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

- Custom field labels will be lost and, hence, will not display in the page layouts even though the custom fields and the associated data exist in the database.

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

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

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

To create a package

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

2. Click **New Package**.

Sugar displays the Package page on the screen.

3. Enter a name for the package and click **Save**.

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

4. Enter information for the following fields:

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

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

Description. Enter a brief description of the package.

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

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

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

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

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

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

To create a module

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

   The Module page displays on the screen.

2. Enter information for the following fields:

   Module Name. Enter a name for the module.

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

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

   Team Security. By default, this option is enabled to allow you to assign a team to access and manage records created in the module. Deselect the box to disable team security, if necessary.

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

   Type. Click a template to select it for your module

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

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

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

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

To edit Sugar Dashlets

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

2. Click **Sugar Dashlet**.

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

3. To edit the List View, click **Sugar Dashlet List View** and follow the procedure described in "**To edit a List View**".

   To edit the Search form, click **Sugar Dashlet Search** and follow the procedure described in "**To edit the Search form**".

To distribute or install a package

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

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

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

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

Deleting Packages

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

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

Module Loader

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

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

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

Before you attempt to install custom modules, you must enter its license information as described in "**License Management**".

To install a module

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

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

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

3. Select the file and then click **Open**.

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

4. Click **Upload**.

    The uploaded module displays in the bottom panel.

5. Click **Install**.

    The license agreement displays on the screen.

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

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

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

    The new module tab is now visible to all users.

To disable and enable a module

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

    Sugar displays the License Agreement on the page.

2. Click **Accept** to accept the agreement.

3. Click **Commit**.

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

4. Click **Back to Module Loader**.

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

5. To enable the module, click **Enable**.

To uninstall a module

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

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

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

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

    The module is removed from Sugar.

Studio

Studio enables you to customize modules by adding new fields, editing existing fields, field labels, page layouts, sub-panels, and Quick Create forms. You can also

customize mobile views for Sugar modules that can be accessed from a mobile device. After you customize a module, you can export it to your local machine and upload in into another Sugar instance using the Module Loader.

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

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

Editing a Module

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

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

To edit a module

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

   The screen above illustrates the Accounts module.

2. Select from the following options**:**

   Labels: Select this option to edit field labels. For more information, see "**Editing Field Labels"**.

   Fields: Select this option to create custom fields, and to edit default fields and custom fields. For more information, see "**To add fields"**. Select this option to edit and create drop-down lists. For more information, see "**Dropdown Editor"**.

   Layouts: Select this option to edit the List View, Detail View, Edit View, Search, and Quick Create forms. For the Leads module, you can also edit the Convert Lead form. For more information, see "**Editing Layouts"**.

   Relationships: Select this option to view existing relationships and create new ones between modules. After you create a relationship, you will need to deploy it to make it available to users. For more information, see "**Creating Relationships"**.

   Subpanels: Select this option to edit one or more of the module's sub-panels. For more information, see "**To edit a sub-panel"**.

   Mobile Layouts. Select this option to edit layouts in Sugar Mobile. You can edit the List View, Detail View, Edit View, and the Search form for mobile views.

3. Click **Save** to save your changes.

Editing Field Labels

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

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

To change field labels

1. Select the module and click **Labels**.

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

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

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

4. Click **Save**.

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

Creating and Editing Fields

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

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

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

Note: You cannot edit the name or data type of a custom field.

To add fields

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

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

2. Click **Add Fields**.

    The Field Editor displays the field types as shown below:

    The information that you need to specify varies depending on the selected data type.

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

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

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

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

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

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

    o   **Date**. Creates a field to enter a date.

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

    o   **Encrypt**. Creates a field for information, such as social security numbers, whose value is stored in an encrypted format in the Sugar database. Sugar uses Blowfish encryption to encrypt passwords. The value is not encrypted in the user interface and is visible to users.

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

    o   **Decimal**. Creates a field to specify the precision past the decimal point.

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

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

    o   **Image**. Creates an image field to upload an image to display in a record. By default, this field is available in Contacts, Users, and Employees.

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

    o   **MultiSelect**. Creates a drop-down list of values. Users can select one or more values from the list.

    o   **Flex Relate**. Creates a drop-down list from which you can associate a related record. Because you can add only one Flex-Relate field to a module, this option does not display in the Data Type drop-down list if you attempt to add it to a module that already contains a Flex Relate field.

    o   **Phone**. Creates a field to enter a phone number.

    o   **Radio**. Creates a radio button.

    o   **Relate**. Creates a field to associate a record with another record as a one-way relationship. You can add multiple Relate fields to a module.

    Note: Relate fields and custom relationships are independent of each other. Changes made to either one are not reflected in the other.

    o   **Textuary**. Creates a large field for a block of text.

    o   **URL**. Creates a field that links to a URL.

○ **TextField**. Create a field for text.

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

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

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

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

○ **Help Text**. Enter descriptive text for the field. Sugar displays this text when users point the cursor at the field. Regular users cannot view this text.

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

○ **Width**. Enter the width in pixels to scale an uploaded image to this width.

○ **Height**. Enter the height in pixels to scale an uploaded image to this height.

○ **Border**. Check this box if you want a border around the image.

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

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

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

○ **Mass Update**. Sugar displays this option when you select the DropDown data type or the Date data type. Adds the field to the module's Mass Update section in the detail view.

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

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

○ **Max Value**. Sugar displays this field when you select the Integer data type. Enter a maximum value during data input.

○ **Auto Increment Next Value**. You can specify an incremental value for the next number for numerical fields such as bug numbers, case numbers, and quote numbers.

Note: If you are using Oracle database, changes to the auto-increment value will be reflected in the Sugar User Interface only after creating a record in the target module such as Bugs, Cases, and Quotes.

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

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

- **Reportable**. By default, this option is selected to enable you to specify this field when you run reports. Enabling this option also makes the field available to you in workflows.

Note: Only fields marked "Reportable" can be specified in time-based workflows.

- **Audit**. Select this option to display field values when a user clicks **View Change Log** on a record's Detail View.
- **Importable**. From the drop-down list, select one of the following:
  Select **Yes** to enable users to import a value into the field.
  Select **No** to prevent users from importing a value into the field.
  Select **Required** to make it a required field during import.
- **Duplicate Merge**. From the drop-down list, specify one of the following options for the Duplicate Merge functionality that allows users to merge records from a record's Detail View.
  - Enabled: The field will appear on the Merge Duplicates page, but will not be available as a filter condition on the Find Duplicates page.
  - Disabled: The field will not appear on the Merge Duplicates page, and will not be available as a filter condition on the Find Duplicates page.
  - In Filter: The field will appear on the Merge Duplicates page and will also be available in the Find Duplicates page.
  - Filter Only: The field will not appear on the Merge Duplicates page, but will be available on the Find Duplicates page.
  - Default Selected Filter: The field will be used for a filter condition by default on the Find Duplicates page, and will also appear on the Merge Duplicates page.

4. Click **Save** to create the field.

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

To edit fields in Studio

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

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

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

3. Edit the properties as needed and click **Save**.

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

To manage fields

- To duplicate the field, click **Clone**, enter a new name, and click **Save**.
- To delete the field, click **Delete**. You must also remove the field from any layout to which it was added.

Editing Subpanels

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

To edit a sub-panel

1. Select the module and then click **Subpanels**.

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

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

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

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

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

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

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

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

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

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

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

Editing Layouts

You can rearrange a layout and change the tabbing order of the fields. You can also remove existing fields or add new ones to a layout.

You can edit the following layouts:

- List View: This consists of List Views for modules and "Select" pop-up windows.
- Detail View
- Edit View
- Sub-panels
- Search form: This consists of the Search form for modules and pop-up windows.
- Convert Lead form
- Quick Create forms

- Sugar Dashlets

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

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

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

Quick Create forms enable users to create a related record from the Shortcut bar or from the sub-panel of a related record that displays in the Detail View of a record. For example, you can create a contact from the Shortcut bar or from the Contacts sub-panel on an account's Detail View. You can also add, remove, and move fields to customize the Quick Create form.

For Sugar Mobile, you can change the layout of the default List View, Detail View, Edit View, and Search form. For more information on Sugar Mobile, see "**Using Sugar Mobile**".

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

To edit a List View

1. Select the module in Studio.

2. Click **Layouts,** and then click **ListView**. To edit the List View for Sugar Mobile, select **Mobile Layouts**, and then select **Mobile ListView** To edit the List View of a Sugar Dashlet, click **Layouts**, select **Sugar Dashlet**, and then click **Sugar Dashlet ListView**. To edit the List View for a Pop-up window click **Layouts,** select **PopupView**, and then choose **Popup ListView**. Sugar displays the Pop-up window when you click Select in the sub-panel of a related module in a Detail View.

   The List View page displays on the screen. The Default column lists fields that are currently displayed in the User Interface. The Available column lists fields that are available to users through advanced search. Users can search for and add any of these fields that they want to view in the search results. The Hidden column lists fields that you do not want users to view when they perform an advanced search.

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

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

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

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

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

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

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

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

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

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

1. Select the module in Studio.

2. Click **Layouts** from the list of module components, and then click **Detail View**, **Edit View**, or **Quick Create**; for Sugar Mobile, click **Layouts** and then select **Mobile Layouts**.

3. Edit the layout as follows:

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

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

   o To add placeholders for additional fields or to replace fields with blank fields, drag the filler row under New Row and drop it into the view. You can then drag a field from the Toolbox into the filler row.

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

   o A new panel or a new row contain two blanks fields. To add additional fields to the panel or row, drag New Panel or New Row into the panel.

   o To enter or edit a field label, click the **Edit** icon within the field and enter the label in the Properties panel; click **Save** to create the label.

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

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

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

4. Click **Save** to save your changes.

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

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

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

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

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

To edit the Search form

1. To edit the Search form for the module, click **Search**. To edit the Search form of the Sugar Dashlet, click **Sugar Dashlet** and then click **Sugar Dashlet Search**. To edit the Search form for Sugar Mobile, select Mobile Layouts and then click **Mobile Search**. To edit the Search form for a pop-up, select **PopupView** and then click **Popup Search**.

2. To edit the Basic Search form, click **Basic Search**; to edit the Advanced Search form, click **Advanced Search**.

    The fields in the current Search form are listed in the Default column, and the available fields are listed in the Hidden column.

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

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

5. To save your changes, click **Save & Deploy**.

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

Note: You cannot use fields from related modules in Mobile Search.

To preview and restore changes

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

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

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

To edit the Convert Lead form

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

2. Select **Convert Lead** to view the Convert page.

    This page displays a list of related modules, such as accounts and opportunities in which users can create a related record during the process of converting a lead to a contact. You can add and removed related modules.

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

4. To copy data from a related record, select the **Copy Data** box corresponding to the module. Sugar automatically lists the related record in the appropriate sub-panel on the Detail View of the newly created contact. For example, if you select Notes, then any note that was created on the Convert Lead form displays in the Activities sub-panel of the contact's Detail View.

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

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

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

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

Exporting Module Customizations

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

To publish a customized module

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

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

2. Enter the following information:

   Package Name. Enter a name for the export package. The package will contain the customizations that you select.

   Author. Enter your name as the author.

   Description. Enter a brief description of the package.

3. Select the customizations you want to export.

4. Click **Export**.

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

5. Select **Save to Disk** and click **OK**.

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

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

Embedding Links and IFrames in a Layout

A Link field allows you to store a URL in a record such as a customer's Website or a link to a related internal or external system. The URL can either be entered as a normal field in an Edit View, or it can be dynamically generated based on other fields in the record.

For example, you can automatically generate a link to a google map of an accounts address. To do this, click the **Generate URL** check box and insert the following in the Default Value field:

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

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

The default value now reads:

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

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

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

To embed a manually entered URL

1. From the Data Type drop-down list, select **IFrame** or **URL**.
2. Enter a name for the field.
3. Enter the desired max size.
4. If using an IFrame, enter the desired height in pixels for the view.
5. Click **Save** to create the field.

To embed a dynamically generated URL

1. From the Data Type drop-down list, select **IFrame** or **URL**.
2. Enter a name for the field
3. Click the **Generate URL** checkbox.
4. Insert the base URL into the Default Value field.
5. Select a field you wish to include in the URL from the dropdown and click I**nsert Field**.
6. Click **Save** to create the field.

Creating Relationships

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

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

In Studio, you can create relationships only between deployed modules. After you deploy a relationship in Studio, you cannot change it.

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

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

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

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

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

Relationship Types. The relationship types are as follows:

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

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

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

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

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

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

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

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

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

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

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

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

To create a relationship in Module Builder

1. Click the custom module to view its details.

2. Click **View Relationships**.

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

3. Click **Add Relationship**.

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

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

   If you select a One-to-One relationship, you can choose a related module. The related module displays as a field in the primary module, and the primary module displays as a field in the related module.

   If you select a One-to-Many relationship, you can select a related module. Sub-panels of the related modules display on the detail page of the primary module. The sub-panel options vary depending on the related module that you select.

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

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

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

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

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

9. Click **Save** to create the relationship.

    The new relationship displays under the Add Relationship button in the middle panel. It is appended with an asterisk to denote that it is a custom relationship.

To create a relationship in Studio

1. Select the module in Studio and click **Relationships**.

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

2. To create a relationship, click **Add Relationship**.

    The Relationship Editor displays on the page.

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

To manage a relationship

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

    You cannot edit or delete relationships in Studio.

2. To delete a relationship, click **Delete**.

Sugar Portal

Sugar Portal is a portal framework that supports a self-service portal for cases, bugs, newsletters, and articles that reside on the Sugar database. Users and contacts can log into Sugar Portal to create, view, and edit case and bugs. They can also subscribe and unsubscribe from campaign newsletters and read Knowledge Base articles such as FAQs. In order to use Sugar Portal, users and contacts must be registered in the system. When they submit their registration, the system creates a new lead in Sugar. To change the registration form, you will need to edit the Leads layout using the Sugar Portal option in Studio.

After installing Sugar Portal, in order to gain access, you will have to first synchronize it with the Sugar server in Studio. Every time you edit Sugar Portal, you will need to perform a synchronization to upload the changes. For more information on Sugar Portal, see the *Sugar Portal Installation and User Guide*.

To customize Sugar Portal modules to suit your requirements, you can add, edit, and remove fields in the Detail View, Edit View, or List View. Custom fields that you create for the Cases or Bug Tracker module display in the Sugar Portal Editor in Studio. You can display these fields in Sugar Portal modules. For more information on creating custom fields, see "**Creating and Editing Fields**".

You can also change the default style sheet to change Sugar Portal's appearance.

You can also customize the Sugar Portal theme and the login dialog box. These files are as follows:

Theme:

o   Header: *themes/Sugar/header.tpl*

o   Footer: *themes/Sugar/footer.php*

o   CSS: *themes/Sugar/style.css*

Login: *modules/Users/Login.tpl*

To edit the Sugar Portal layout

1. From the Developer Tools sub-panel of the Administration Home page, select **Sugar Portal**.

2. Select **Layouts**.

   You can edit the Bug Tracker, Cases, Leads, and Knowledge Base modules.

3. Select the module that you want to edit.

   The example below illustrates the Detail View of the Cases module.

   Available fields are listed in the left panel. The current layout in the right panel display fields that are currently in the Detail View.

   The right panel also displays a recycling bin icon that you can use to remove fields from the current layout.

4. To remove an existing field, drag it to the Recycling bin.

   The field is removed from the view but is not deleted from the system.

5. To replace an existing row in the view with another one, drag the new field from the left panel and drop it on the field that you want to replace.

6. To add placeholders for additional fields, drag New Row and drop it into the view. You can then drag a field from the Available Fields into the empty row.

7. Click **Save** to save your changes.

8. Click **Save and Deploy** to make it available to all users in your organization.

To update the Sugar Portal style sheet

1. On the Sugar Portal Editor page, click **Upload Style Sheet**.

2. Click **Browse**, navigate to the location of the style sheet, and select it.

3. Click **Upload** to display the new style sheet in the Sugar Portal Editor.

Note: The Sugar Portal version must be compatible with the Sugar application version. For example, Sugar Portal 6.0.0 can be used only with Sugar Enterprise 6.0.0.

Upgrading Sugar Portal

If you are using Sugar Portal 5.2.0, 5.5.0, or 5.5.1, you can upgrade to version 6.0.0. This is a two-step process. First, you must upgrade your Sugar application to version 6.0.0. Then you can perform a synchronization to upgrade to Sugar Portal 6.0.0.

1. Upgrade your Sugar application to 6.0.0.

2. Create a backup copy of your current Sugar Portal code to save any customizations; note down the custom files.

3. Synchronize the data with Sugar Portal as described below in "**To update Sugar Portal**".

This will update your Sugar Portal application and overwrite any customizations you had made in Sugar Portal.

4. Compare the list of new and updated files for the 6.0.0 Sugar application with the list of customized files in your existing Sugar Portal application.

   This list is located in the *portal* folder of the Upgrade zip file. For example, *SugarEnt-Upgrade-5.5.1-to-6.0.0.zip\SugarEnt-Upgrade-5.5.1-to-6.0.0\portal*.

5. Manually merge your changes into Sugar Portal 6.0.0.

To update Sugar Portal

1. In Sugar Portal, click **Sync Portal**.

2. In the Sugar Portal URL field, enter the URL of the portal instance that you want to update and click **Go**.

   After the synchronization process completes, the system displays a message stating that the synchronization is complete. You can now log into the portal to view the updated version.

Configure Tabs

This option enables you to hide selected module tabs from users and reorder them as needed.

When you hide a module from a user, the module tab is not visible to the user upon logging into Sugar. However, if the hidden module is related to a module that is visible to users, it displays as a sub-panel in the Detail View of the related module. Therefore, users can still access related records of the hidden module from the Detail View of the related module. Hidden modules are also available to users through the Reports module. Therefore, use roles to completely block users from accessing a module. For more information, see "**Role Management**".

You can allow users to configure tabs for modules that they can access from their User Settings page. This would allow users to override the global settings that you set with the Configure Tabs option.

By default, the following modules are hidden:

Projects

Bug Tracker

Forecasts

Contracts

Knowledge Base

Note: You cannot hide the Home tab.

To configure module tabs

1. In Developer Tools, select **Configure Tabs**.

   The Configure Tabs page displays all the tabs in the Display Tabs list.

2. To hide a tab, select it in the Display Tabs column, and drag and drop it into the Hide Tabs column.

3. To rearrange the order in which the tabs are displayed, drag and drop the tabs to the desired positions.

4. To prevent users from configuring module tabs, deselect the **Allow users to configure** tabs option.

5. Click **Save** to save the configuration; click **Cancel** to exit the page without saving your changes.

   The module tabs no longer display in your Sugar instance.

Configure Subpanels

You can hide module sub-panels if you do not want to display them in the Detail View of a related module. When you hide a sub-panel, users cannot view related records from the Detail View of a related module.

To configure a sub-panel

1. In Developer Tools, select **Configure Subpanels.**

   The Configure Subpanels page displays the list of displayed sub-panels in the Displayed Subpanels list.

2. To hide a sub-panel, select it in the Display Subpanels column, and drag and drop it into the Hide Subpanels column.

3. Click **Save** to save the configuration; click **Cancel** to exit the page without saving your changes.

   The hidden sub-panels no longer display in the Detail View of related modules.

Rename Tabs

You can rename tabs for Sugar modules

To rename tabs

1. In Developer Tools, select **Rename Tabs**.

   The tab labels and the corresponding database values display on the page. From the drop-down list displayed above the tab labels, you can select the language to display the tab.

2. Click the label that you want to edit and replace it with the new value.

3. Click **Save** to save your changes; click **Undo** to revert to the previous value; click **Redo** to go back to your change.

Dropdown Editor

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

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

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

To create a drop-down list

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

   Sugar displays fields to add a new drop-down list in the Edit Dropdown tab.

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

2. Click **Add Dropdown**.

   Fields to add a new drop-down list display in the Edit Dropdown tab.

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

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

4. In the Item Name field, enter a name for the item.

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

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

   This is the label that displays to users.

7. Click **Add**.

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

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

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

   The list displays in the dropdown list on the Edit Field tab of a module.

To edit an existing drop-down list

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

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

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

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

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

Workflow Management

Workflows allow you to track events, set out alerts, and execute necessary actions when the specified conditions are met; for example, when a time period expires or a record changes, Sugar can send out an alert to the assigned user and team.

The workflow cycle is as follows:

1. Create a workflow definition

2. Specify the conditions as described in "**Creating a Condition"** to trigger alerts, and optionally, actions.

3. Create an alert or select from existing list as described in "**Creating Alerts"**.

4. Create actions or select from existing list as described in "**Creating Actions"**.

5. In case of multiple workflows, specify the execution sequence as described in "**Specifying the Workflow Sequence"**.

Note: You must first enable the notification settings to send alerts to recipients. If the events are time-based, records must be initially saved or changed to start the timed event.

To create a workflow definition

1. In Studio, select Workflow Management or in the Studio wizard, select **Edit Workflow**.

   The Workflow Home page displays. You can view existing workflows, search for an existing workflow, and create workflow definitions and alert templates from this page.

2. From the Actions list, select **Create Workflow Definition** and enter the following information:

   Name. Enter a name for the workflow.

   Execution Occurs. From the drop-down list, select the event to trigger the workflow. Execution can occur when a record is saved or when a specified period of time has elapsed.

   Note: Setup the cron and ensure that it executes at least once before you create a time-based workflow.

   Status. From the drop-down list, select active to implement the workflow; select inactive if you do not want to implement the workflow yet.

   Target Module. From the drop-down list, select the module to which the workflow applies.

> **Applies to**. From the drop-down list, select the records to which the workflow applies.
>
> **Processing Order**. From the drop-down list, select the sequence in which to execute the workflow.
>
> **Description**. Enter a brief description of the workflow.

3. Click **Save** to create the workflow; click **Cancel** to exit the page without creating the workflow.

   The workflow definition's Detail View displays on the screen. You can edit, delete, and duplicate the workflow from the Detail View. To create a similar workflow definition, you can duplicate the workflow, save it, and then edit it as needed to create a new workflow.

Next, on the Workflow detail page, create the conditions and the alerts.

Creating a Condition

A condition specifies the event that triggers the workflow.

To create a condition

1. On the Workflow detail page, click **Create** in the Conditions sub-panel.

   Sugar displays a list of possible conditions in a pop-up window.

2. Select a condition.

   Sugar displays the selected condition in the text field below. If the condition you select requires you to specify a field or a module, the system underlines it in the text field.

3. Double-click the field or the module in the text field.

   A pop-up window displays a drop-down list from which you can select the field or the module.

Note: Only fields marked "Reportable" can be specified in time-based workflows.

4. Click **Save**.

   Sugar displays the selected field or module in the text box.

5. Click **Save** to create the condition.

   The condition is now listed in the Conditions sub-panel on the Workflow detail page. Next, you must create or select an alert.

Creating Alerts

You can create individual alerts, or you can use alert templates. After you create an alert, you can specify one or more users as the recipients of the alert. You can send out alerts as emails or as invitations.

To create an Email Alert Template

1. Navigate to the Workflow Home page, and select **Alert Email Templates** from the Actions list.

2. On the Alerts Templates page, select the module from the drop-down list and click **Create**.

3. Enter information for the following fields:

   Name. Enter a name for the template.

   From Name. Enter the sender's name.

   From Address. Enter the sender's email address.

   Description. Enter a brief description of the template.

   Target Module. From the drop-down list, select a record or a specific field, which when updated, triggers the alert. For example, if you want send out an alert when the ownership of an account changes, select **Ownership** from the drop-down list.

4. **Related Module**. To trigger an alert in case of a change to a related module, select the module from the drop-down list.

5. In the Alert body field, enter the text and then select the old value and click **Insert**. Then select the new value and click **Insert** again.

   For example: The ownership of this account has changed from *<old value>* to *<new value>*.

6. **Alt Text**. If your system cannot render HTML, then select this box to send out the alert as a plain text message, and enter the message in plain text in the field below.

7. Click **Save** to create the template; click **Cancel** to exit the page without saving the template.

   When you create an alert from a workflow definition's Detail View, the alert template is listed in the Custom Template drop-down list when you choose Custom Template as the Source Type.

To create an alert

1. In the Alerts sub-panel, click **Create** to create a new alert.

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

   Name. Enter a name for the alert.

   Alert Type. From the drop-down list, select the type of alert.

   Source Type. From the drop-down list, select **Normal Message** if you will be entering the alert message in the Alert Text box; select **Custom Template** if you want to use a pre-existing alert template.

   Alert Text. If the source type is Normal Message, enter the message in this box.

   Custom Template. This field displays existing alert templates if you select **Custom Template** as the source type. Select the template from the drop-down list.

3. Click **Save** to create the alert; click **Cancel** to exit the page without creating the alert.

The Alert Recipient List sub-panel displays to enable you to create a list of recipients of this alert.

To create an alert recipient list

1. In the Alert Recipient List sub-panel, click **Create**.

   A pop-up window displays options to select the recipients.

2. Select an option from the list.

   Sugar displays the selected option in the text field below. If an option requires you to specify details such as a user or address type, the system underlines the keywords.

3. Double-click the keyword to select from existing records.

4. Click **Save**.

   The selected users are listed in the Alert Recipient List sub-panel. To remove a recipient, click the Remove (rem) icon.

   Next, you need to specify the actions to execute.

Creating Actions

You can create an action to execute when an event occurs. Some examples of actions are updating fields and creating records.

To create an action

1. On the Workflow detail page, click **Create** in the Actions sub-panel.

   A pop-up window displays a list of possible actions.

   Update fields in the target module: Value of the fields in the target record will be modified/changed.

   Update fields in a related record: Value of the fields in a related record will be changed according to the selection of options.

   Create a record in a module associated with target module: A new record is created.

   Create a record associated with a module related to the target module: A new record is created according to the selection.

2. Select one or more actions.

   Sugar displays the selected actions in the text field below.

3. If a selected action requires you to specify a record, double-click the underlined keyword in the text field, select the related module from the drop-down list, and click **Save**.

4. Click **Save** to create the action.

Specifying the Workflow Sequence

If you created more than one workflow process for a particular module, you can rearrange the order of the execution as necessary.

To specify the workflow sequence

1. Navigate to the Workflow Detail View, and select **Workflow Sequence** from the Actions list.

2. On the Workflow Sequence page, select the module from the drop-down list, and click **Select**.

   Sugar displays the workflow processes that you created for the module.

3. To change the workflow sequence, rearrange the process order using the Up and Down arrows.

Testing the Workflow

To test the effect of a workflow, perform the following steps:

1. Log into Sugar as an administrator.

2. Click the **Admin** link at the right-hand corner of the page.

3. On the Administration Home page, navigate to Email > Email Settings and ensure that the Email settings are correct. Issuing alerts depend on these settings.

4. Select the **Enable Notifications On?** to enable it. This is required to send a Workflow Alert to the intended recipient.

5. Log in as a Sugar user.

6. Click **User Settings**.

7. Change the email address to an address from which you can retrieve emails.

8. Access an opportunity.

9. Change the Sales Stage to Closed Won.

10. Save the record.

    You should now receive an email regarding the opportunity win. A new case is also created for the account associated with the opportunity when the Sales Stage becomes "Closed Won".

Products and Quotes

This section consists of the following options that enable you to manage the product catalog, along with the related information on manufacturers and shipping providers.

- **Product Catalog**
- **Product Types**
- **Product Categories**
- **Manufacturers**
- **Shipping Providers**
- **Tax Rates**

Products can be broadly classified into product types; for example, Software and Hardware. Each product type can be further organized into several categories. For

example, the software product type can contain product categories such as Spreadsheets and Word Processors. You can create categories within a category.

The figure below illustrates product groupings within the catalog.

```
┌─────────────────────────────────────────────────────────────┐
│                      Product Catalog                         │
│                                                              │
│  ┌─────────────────┐  ┌─────────────────┐  ┌─────────────────┐ │
│  │  Product Type 1 │  │  Product Type 2 │  │  Product Type 3 │ │
│  │ ┌─────────────┐ │  │ ┌─────────────┐ │  │ ┌─────────────┐ │ │
│  │ │  Category 1 │ │  │ │  Category 1 │ │  │ │  Category 1 │ │ │
│  │ │  Product 1  │ │  │ │  Product 1  │ │  │ │  Product 1  │ │ │
│  │ │  Product 2  │ │  │ │  Product 2  │ │  │ │  Product 2  │ │ │
│  │ │  Product 3  │ │  │ │  Product 3  │ │  │ │  Product 3  │ │ │
│  │ └─────────────┘ │  │ └─────────────┘ │  │ └─────────────┘ │ │
│  │                 │  │                 │  │                 │ │
│  │ ┌─────────────┐ │  │ ┌─────────────┐ │  │ ┌─────────────┐ │ │
│  │ │  Category 2 │ │  │ │  Category 2 │ │  │ │  Category 2 │ │ │
│  │ │  Product 1  │ │  │ │  Product 1  │ │  │ │  Product 1  │ │ │
│  │ │  Product 2  │ │  │ │  Product 2  │ │  │ │  Product 2  │ │ │
│  │ │  Product 3  │ │  │ │  Product 3  │ │  │ │  Product 3  │ │ │
│  │ └─────────────┘ │  │ └─────────────┘ │  │ └─────────────┘ │ │
│  └─────────────────┘  └─────────────────┘  └─────────────────┘ │
│                                                              │
└─────────────────────────────────────────────────────────────┘
```
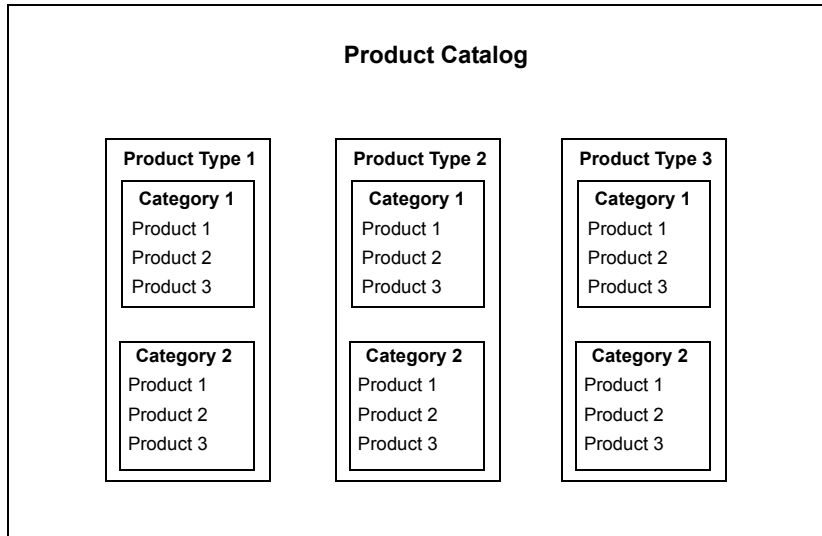
Product Catalog

Use this option to maintain the product catalog for your organization.

From the Product Catalog Home page, you can view a list of current products. You can add new products to the catalog or import the data from CRM applications such as Salesforce.com or through a .csv file.

Product Types

The Product Types option enables you to classify records in the product catalog. You can also import product types as described in ."**Importing Data"**.

Product Categories

The Product Categories option enables you to create new categories to further group records under a Product Type. You can also import product category information from an external location.

Manufacturers

The Manufacturers option enables you to maintain a list of product manufacturers and specify the order in which they are presented for selection in the Quotes module. You can also import manufacturer data from an external location.

Shipping Providers

The Shipping Provider option enables you to maintain a list of shipping providers for selection in the Quotes module.

Tax Rates

The Tax Rates option lets you maintain a list of national and international tax rates. Tax Rates are available for selection in the Quotes module.

To add a product to the catalog

1. On the Administration Home page, click the **Product Catalog** option in the Product and Quotes sub-panel.

2. In the Actions list of the Product Catalog Home page, click **Create Product for Catalog**.

3. On the Product Catalog page, enter information for the following fields:

   Product Name. Enter the name of the item.

   Category. Click **Select** to choose the category to which the new item belongs; click **Clear** to delete the selection.

   Product URL. Enter the URL to where the product information is located.

   Tax Class. From the drop-down list, select the appropriate option to specify whether the item is taxable or not.

   Manufacturer. From the drop-down list, select the manufacturer of the item.

   Mft. Part Number. Enter the manufacturer's part number for the item.

   Vendor Part Number. Enter the retailer's part number for the item.

   Currency. From the drop-down list, select the currency in which the price is quoted.

   Cost. Enter the cost price of the item. This price will not appear in quotes.

   List Price. Enter the list price of the item.

   Discount Price. This is the minimum price of the item. The system calculates this price based on the percentage that you specify in the Default Pricing Formula field, described below.

   Default Pricing Formula. From the drop-down list, select a formula to arrive at the discount price.

   Depending on the formula, the system takes the cost price into consideration to calculate the discount price. If you select Profit Margin, enter the points in the adjoining field; if you select Markup over Cost or Discount from List, enter the percentage in the adjoining field.

   Availability. From the drop-down list, select whether the item is in stock or not.

   Date Available. If the item is out of stock, click the **Calendar** icon and select the date when it will be available.

   Quantity in Stock. Enter the number of units that are in stock.

   Weight. Enter the item weight.

   Type. From the drop-down list, select from product type to which the item belongs.

   Support Name. Enter the name of the Customer Support person.

Support Contact. Enter the person's contact information, such as the phone number.

Support Desc. Enter a brief description for the type of support provided to customers.

Support Term. From the drop-down list, select the length of the support period.

Description. Enter a description of the product.

4. Click **Save** to add the product to the catalog; click **Cancel** to exit the page without creating the product.

To manage the product catalog

1. To view the details of an item, click its name in the Product Catalog List.

2. To edit the information, on the detail page, click **Edit**, revise the information, and click **Save**.

3. To duplicate the information, on the detail page, click **Duplicate**, and click **Save**.

4. To delete an item, on the detail page, click **Delete**. When you delete a product type or category, all records under it are also deleted.

5. To import products, in the Actions list, click **Import Products**, and follow the process described in "**Importing Data**".

6. To export item data from the catalog to your local machine, click the Export link in the Product Catalog List sub-panel, and follow the process described in **"Exporting Data"**.

7. To update or delete some or all the records on the Product Catalog list, use the Mass Update sub-panel as described in "**Editing and Deleting Multiple Records**".

To create a product type

1. On the Product Catalog Home page, click **Product Types**, and then click **Create**. Alternatively, on the Administration Home page, click **Product Types** in the Products and Quotes sub-panel, and then click **Product Type List** in the Actions list.

   The Product Types Home page displays fields to create a new type.

2. Enter information for the following fields:

   Product Type. Enter a name for the new product type.

   Description. Enter a brief description for the product type.

   Order. Enter a number to specify the order in which the product type will appear in the drop-down list.

3. To create the type, click **Save**.

4. To create another product type, click **Save & Create New**.

To manage product types

1. To view the details of a product type, click its name in the Product Type List.

At the bottom of the page, the Product Type sub-panel displays the details.

2. To edit the details, revise the information in the Product Type fields and click **Save**.

    The revised product type is displayed at the end of the list.

3. To delete a product type, click the del icon corresponding to the name in the Product Type List; click **OK** to confirm the deletion.

4. To import product type data, in the Actions list, click **Import Product Types**, and follow the process described in "**Importing Data"**.

To create a product category

1. On the Administration Home page, click the **Product Categories** option in the Product and Quotes sub-panel.

2. In the Product Categories Home page, click **Create**.

    Sugar displays fields to create a new category in the Product Category sub-panel.

3. Enter information for the following fields:

    Product Category. Enter a name for the category.

    Parent Category. If the product category is a sub-set of another category, click **Select** to choose the parent from the Product Categories list; click **Clear** to remove your selection.

    Description. Enter a brief description of the category.

    Order. Enter a number to specify the order in which this category will appear in the Product Category drop-down list.

4. To create the category, click **Save**.

5. To create another category, click **Save** and **Create New**.

To manage product categories

1. To view the details of a category, click its name in the Product Category List.

    Sugar displays the category's details in the Product Category sub-panel.

2. To edit the details, revise the information in the Product Category fields and click **Save**.

3. To delete a product category, click the del icon corresponding to the name in the Product Categories List; click **OK** to confirm the deletion.

4. To import product category data, in the Actions list, click **Import Product Categories**, and follow the process described in "**Importing Data"**.

To create a manufacturer

1. On the Admin Home page, click **Manufacturers** in the Products and Quotes sub-panel. Alternatively, click **Manufacturers** in the Actions list of the Product Catalog, Product Categories, or Product Types home page.

2. On the Manufacturers Home page, click **Create**.

    Sugar displays the Manufacturer sub-panel.

3. Enter information for the following fields:

    Manufacturer. Enter the manufacturer's name.

    Status. From the drop-down list, select **Active** to add the name to the Manufacturers drop-down list.

    Order. Enter a number to specify the order in which the name displays in the drop-down list.

4. To create the manufacturer, click **Save**.

5. To create another manufacturer, click **Save** and **Create New**.

To manage manufacturers

1. To view the details of a manufacturer, click the name in the Manufacturer List.

    The Manufacturer sub-panel displays the manufacturer information.

2. To edit the details, click **Edit**, revise the information, and click **Save**.

3. To delete a manufacturer from the list, click the del icon corresponding to the name in the Manufacturer List; click **OK** to confirm the deletion.

To create a shipping provider

1. On the Admin Home page, click **Shipping Providers** in the Products and Quotes sub-panel.

2. On the Shipping Provider Home page, click **Create**.

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

    Shipping Provider. Enter the name of the provider.

    Status. From the drop-down list, select **Active** to display the name in the Shipping Provider drop-down list.

    Order. Enter a number to specify the order in which the name is displayed in the drop-down list.

4. To create the provider, click **Save**.

5. To create another provider, click **Save and Create New**.

To manage shipping providers

1. To view the details of a provider, click the name in the Shipping Provider List.

    Sugar displays the provider's details in the Shipping Provider sub-panel.

2. To edit the details, revise the information, and click **Save**.

3. To delete a provider from the list, click the del icon corresponding to the name in the Shipping Provider List; click **OK** to confirm the deletion.

To create tax rates

1. On the Administration Home page, click **Tax Rates** in the Products and Quotes sub-panel.

2. On the Tax Rate page, click **Create**.

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

   Tax Rate Name. Enter a name for the tax rate.

   Percentage. Enter the tax percentage.

   Status. From the drop-down list, select **Active** to display the name in the Tax Rate drop-down list.

   Order. Enter a number to specify the order in which the tax rate is displayed in the drop-down list.

4. To create the tax rate, click **Save**.

5. To create another rate, click **Save and Create New**.

To manage tax rates

1. To view the details of a tax rate, click the name in the Tax Rate list.

   Sugar displays the rate details in the Tax Rate sub-panel.

2. To edit the details, revise the information, and click **Save**.

3. To import a list of tax rates as a .csv file, click Import in the Actions list on the Tax Rate Home page. You can view the import file in Excel or save it to your local machine. For more information on importing data see "**Importing Data**".

4. To delete a tax rate from the list, click the del icon corresponding to the name in the **Tax Rate** list; click **OK** to confirm the deletion.

Bug Tracker

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

To create a release

1. On the Administration Home page, click **Releases** in the Bug Tracker sub-panel.

2. On the Releases Home page, click **Create**.

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

   Release Version. Enter the version number of the release.

   Status. From the drop-down list, select **Active** to display the name in the Release drop-down list.

   Order. Enter a number to specify the order in which the release is displayed in the drop-down list.

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

5. To add another release to the list, click **Save and Create New**.

Forecasts

This section provides the Time Periods option that enables you to define time periods for the Forecasts module. These time periods display in the Time Periods drop-down list in the Forecasts Module.

You must define at least one time period to represent a fiscal year. Then you can choose to define quarters and months as time periods within a year, as needed. Time periods can overlap and can include times from other periods.

After you create a time period, you can create a schedule to run the forecast automatically for a specific user. Some schedules might need to include start dates for a quarter prior to when the quarter officially begins. When you create a forecast schedule for a user, you can select the **Cascade** checkbox if you want it to be available for all the user's direct and indirect reports as well as just the specified user.

To create a time period

1. On the Admin Home page, click **Time Periods** in the Forecast sub-panel.

2. On the Time Periods Home page, click **Create Time Period**.

3. Enter information for the following fields:

    Time Period. Enter a name for the time period; for example, Q1 2006.

    Start Date. Click the Calendar icon and select the start date of the time period.

    Is Fiscal Year? Select this box if the time period represents the fiscal year.

    End Date. Click the Calendar icon and select the end date for the time period.

4. To create the time period, click **Save**; click **Cancel** to exit the page without saving your changes.

    After you save the time period, the Forecast Schedule sub-panel displays on the time period's detail page.

To manage time periods

1. To view details of a time period, click its name in the Time Periods list.

2. To export one or more time periods from the list to your local machine, select them in the Time Period list sub-panel, click the **Export** link, and follow the process described in "**Exporting Data**".

3. To update or delete some or all the time periods, use the Mass Update sub-panel as described in"**Editing and Deleting Multiple Records**".

4. To edit a time period, on the detail page, click **Edit**, revise the information, and click **Save**.

5. To duplicate a time period, on the detail page, click **Duplicate** and then click **Save**.

6. To delete a time period, on the detail page, click **Delete**.

To create a forecast schedule

1. In the Forecast Schedule sub-panel of the time period's detail page, click **Create**.

2. On the Forecast Schedule page, enter information for the following fields:

   Forecast Start Date. Click the Calendar icon and select the date to run the forecast.

   Schedule For. From the drop-down list, select the user for whom you are creating the forecast.

   Status. Select **Active** to run the forecast as scheduled; select **Inactive** to stop running the forecast.

   Cascade? Check this box if you want all the user's direct and indirect reports to receive the forecast as well.

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

Contract Types

This section provides the Contract Type option that enables you to define contract types for the Contracts module. When a user create a contract, the Types drop-down list displays the contract types for selection.

Because a contract can reference multiple documents such as Statements of Work and Non-Disclosure Agreements, you can associate one or more documents with a contract type. When users create a contract of a specific type, the associated documents display in the Documents sub-panel. Users can then edit and manage these documents as needed.

To create a contract type

1. On the Admin Home page, click **Contract Types** in the Contracts sub-panel.

2. On the Contract Types home page, click **Create**.

3. In the Contract Type sub-panel that displays at the bottom of the page, enter information for the following fields:

   Name. Enter a name for the contract type.

   List Order. Enter a number to specify the order in which the name is displayed in the Types drop-down list in the Contracts module.

4. To add the contract type to the list, click **Save**.

5. To add another contract type to the list, click **Save and Create New**.

The new contract type now displays in the Contract Types list.

To manage Contract Type records

- To export one or more Contract Type records in .csv format, select them from the list and click **Export**. You can open the file in Excel or save it to your local machine.

- To delete one or more Contract Type records, select them from the list and click **Delete**.

To associate documents with a contract type

1. In the Documents sub-panel of the contract's detail page, click **Select** to display the Documents List.

2. Click one or more documents in the Documents List to select them.

   The selected documents along with details such as document type and revision number display in the Documents sub-panel on the Contract Type page. For templates, the Template? box is selected.

3. To edit the document, click the **Edit** icon corresponding to the document name.

4. To remove a document, click the rem icon corresponding to the document name.

Employee Records

As an administrator, you can create and manage employee records. When you create an employee record, it is automatically added to the Employees list as well as the Users list.

To create an employee record

1. Log into Sugar as an administrator.

2. Click the **Employees** link located at the top right-hand corner of the page.

3. In the Actions list of the Employees Home page, click **Create Employee**.

4. On the Employees page, enter information for the following fields:

   First Name. Enter the employee's first name.

   Last Name. Enter the employee's last name.

   Picture. If you have downloaded the person's picture in .jpg or .png format on your local machine, click **Browse** to navigate to the location and upload the picture into the record.

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

   > Active: Select this option to specify a current employee of your organization.

   > Terminated: Select this option if the employee is no longer working for your organization.

   > Leave of Absence: Select this option if the employee is going to be absent from work for an extended period of time.

   Title. Enter the employee's official title.

   Department. Enter the name of the department to which the employee belongs.

   Reports to. Enter the name of the employee's supervisor.

   Office Phone. Enter the employee's office phone number.

   Mobile. Enter the employee's cell phone number.

   Other. Enter an alternative phone number for the employee, if any.

   Fax. Enter the fax number for the employee.

   Email. Enter the email address for the employee.

Home Phone. Enter the home phone number for the employee.

Other Email. Enter an alternative email address for the employee, if any.

IM Type. From the drop-down list, select the type of Instant Messenger service that the employee has.

IM Name. Enter the employee's user name for the IM service.

Notes. Enter any comments concerning the employee.

Primary Address. Enter the employee's primary address.

City. Enter the name of the city.

State. Enter the name of the State.

Postal Code. Enter the zip code of the address.

Country. Enter the name of the country.

5. Click **Save** to create the employee record; click **Cancel** to exit the page without saving your changes.

   You can now view the record in the Employees List View as well as the Users List View.

To manage employee records

- To search for an employee, use the Search sub-panel located above the Employees list.

- To view an employee's details such as the title and contact information, click the employee name in the List View.

- To email an employee, click the user's email address in the List View.

- To export employee records, select them from the list, click **Export** and follow the process detailed in "**Exporting Data"**.

- To edit the status of multiple employees, use the Mass Update panel as described in "**Editing and Deleting Multiple Records"**.

- To edit an employee's record, on the detail page, click **Edit**, update the information, and click **Save**.

- To duplicate a record, on the detail page, click **Duplicate**, modify the information if needed, and click **Save**. Duplication is a convenient way of creating a new employee. You can change the information in the duplicate record to create the new employee.

  Note: You cannot delete an employee record.

- To go back to the Employees Home page from a detail page, click **Employees** in the Actions list.

Knowledge Base Administration

Knowledge Base enables users to write articles on any subject for the benefit of other Sugar users and Sugar Portal users. For more information on loading modules, see

"**Module Loader**". For more information on creating and managing articles, see "**Creating Articles**".

Similar to other Sugar records, each article must have an assigned team and an assigned user. Only members of the assigned team can access and manage articles. Sugar Portal users can read articles but cannot edit them.

If you have installed Sugar Portal, you must synchronize Sugar Portal with Sugar to allow Sugar Portal users to read Knowledge Base articles.

Tagging Articles

Knowledge Base articles reside in the Sugar database. Users and administrators can use tags to group articles according to subject or any other criteria. When you tag an article, the system creates a link between the article and the tag. You can apply multiple tags to an article. By default, the Knowledge Base module includes the FAQs root tag.

A tag can be of two types: root tags and sub-tags. A sub-tag is nested within a root tag. Both root tags and sub-tags can contain other sub-tags to further group articles into smaller categories.

The number of articles that a tag contains is displayed within parentheses next to the tag name. Select a tag to view a list of associated articles in the right panel. By pointing the cursor at the article's title or by clicking the title, you can view its contents.

For information on creating, editing, duplicating, emailing, and deleting articles, see "**Knowledge Base Module**". Tagging, moving, and deleting articles are described later in this section.

Administrators can create, rename, and delete tags. Users can create tags during the process of creating or editing articles. However, they cannot rename or delete tags.

To create tags

1. From the Actions list of the Knowledge Base module, click **Knowledge Base Admin**.

   Sugar displays the Knowledge Base Admin page on the screen. This page displays existing tags. By default, the Knowledge Base module includes the FAQs root tag. The number of articles that a tag contains is displayed within parentheses.

2. To create a new tag, from the Admin Actions drop-down list, select **Create New Tag**.

3. To create a new root tag, select **Tags** and enter the tag name in the adjoining text field; to create a sub-tag select an existing tag and enter the tag name in the text field.

4. Click **Save** to create the tag.

   A new root tag displays below the Tags folder. A new sub-tag displays within the parent tag.

To tag articles

1. Select **Apply Tag to Articles** from the Admin Actions drop-down list and select the tag that contains the articles from the Tags list below.

   The system displays the articles in the right panel.

2. Select the articles from the list and click **Select Tags**.

   The existing tags displays in a separate window.

3. Select the tag that you want to associate with the article and click **Apply Tags**.

4. The article is copied from the previous tag to the new tag.

To rename a tag

1. Select **Rename Tag** from the Admin Actions drop-down list and select the tag from the Tags list below

   Sugar displays the current tag name and a text field to enter the new name next to the drop-down list.

2. Enter the tag's new name and click **Save**.

   The system changes the tag name.

To delete a tag

1. Ensure that the tag is empty. Move or delete any articles that the tag contains.

2. Select **Delete Tag** from the Admin Actions drop-down list and select the tag from the Tags list below.

3. Click **Delete Tag**.

   The system deletes the tag.

Managing Articles

You can delete outdated articles that have passed their expiration date. If you want to delete a tag, you will need to first either delete or move the articles that it contains. Deleting an article from a tag removes the association between them. However, the article still exists in the Sugar database and associations with other tags, if any, remain unchanged.

To move articles from a tag

1. Select **Move Selected Articles** from the Admin Actions drop-down list and select the tag that contains the articles from the Tags list below.

   Sugar displays the articles in the right panel.

2. Select the articles from the list and click **Select Tags**.

   Sugar displays the existing tags in a separate window.

3. Select the tag that you want to associate with the article and click **Move**.

   The article is moved from the previous tag into the new tag. If the article already existed in the new tag, the system overwrites the existing article.

To delete articles from a tag

1. Select **Delete Selected Articles** from the Admin Actions drop-down list and select the tag that contains the articles from the Tags list below.

    The system displays the articles in the right panel.

2. Select the articles from the list and click **Delete**.

    The system deletes the article from the tag.

Enabling Full Text Search

In order to use Knowledge Base, your database must have the capability to perform a full text search. MySQL and Oracle provide this feature, but if you are using Microsoft SQL Server, you need to perform additional steps as detailed below:

1. If you have installed SQL Server 2005 Express Edition, then you must upgrade to SQL Server 2005 Express Edition with Advanced Services, available at:

    http://msdn.microsoft.com/vstudio/express/sql/download

2. When installing SQL Server 2005 Express Edition with Advanced Services, do not accept all defaults because the default setting for full text indexing is "Do not install".

3. After installing the Microsoft SQL Server Express/Enterprise edition, ensure that full text indexing service is turned on. You can verify this in the Services Panel. You can access the Services Panel from the Control Panel.

Advanced Configuration Options

The advanced configuration options listed below enable you to exercise tighter control over user actions in your Sugar instances.

Locking Down Upgrade Wizard, Module Builder, and Backups

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

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

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

2. Set the following parameter as shown below:

    ```
    $sugar_config['admin_access_control']=true
    ```

3. Save the file.

Restricting the Module Loader

To ensure that users with administrative privileges do not load sub-standard custom modules into Sugar, you can restrict the Module Loader to a specific directory that you control. This allows you to check modules before they are loaded into Sugar.

To restrict the Module Loader

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

2. Set the following parameters as shown below:

   ```
   $use_common_ml_dir=true
   ```

   ```
   $common_ml_dir='ml directory'
   ```

   where **ml directory** is the name of the directory from which module will be loaded into Sugar.

3. Save the file.

Limiting System Resources

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

Configuring Default Permissions for Sugar Files on Linux

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

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

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

For `dir_mode`, you may see a value of 1528, which is the decimal equivalent of the octal value 02770. For `file_mode` you may see a value of 432 which is the decimal equivalent of octal value 0660.

Using a Slave Database

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

To configure a slave database

1. Navigate to the *config_override.php* file in the Sugar root directory.

2. Set the following parameters as follows:

   ```
   $sugar_config['db']['reports'] = array
   (
   'db_host_name' => 'host_machine_name',
   ```

```
'db_user_name' => 'readonly_user',
```

where *readonly_user* is a user with read-only privileges.

```
'db_password' => 'user_password',
```

where *user_password* is the read-only user's password.

```
'db_name' => 'reports_slave',
```

where *reports_slave* is the database with which Sugar is connecting

```
'db_type' => 'database_type',
);
```

where *database_type* is My SQL, MS SQL, or Oracle.

3. Save the file.

Note: If you are using MS SQL and your main database and alternate database are on the same host machine, you must specify different users for the two databases.

Sharing Calendar Information in Microsoft Outlook

You can specify settings in Outlook so that the free/busy information from the Outlook calendar for a user is shared with the user's Calendar in Sugar. The settings must be configured on each user's computer.

In Microsoft Outlook, do the following:

1. Select Tools > Options. Then click **Calendar Options**.

2. Click **Free/Busy Options**.

3. Select the Publish at my location checkbox, and enter the path for the Sugar email account information following the syntax:

   http://serviceman/sugarcrm/vcal_server.php/type=vfb&source=outlook&email=

   myemail@servername.com

   where *myemail@servername* is the email address specified under Email Options in the user's User Settings page in Sugar. On the User Settings page in the Calendar Options, the URL for publishing free/busy information is displayed in Your Publish URL.

4. For Search location enter the path for the Outlook account information, such as:

   http://servername/sugarcrm/vcal_server.php/
   type=vfb&source=outlook&email=%NAME%@%SERVER%

   where %NAME% and %SERVER% are Outlook replacement variables to construct the email address.

Index