Sugar Serve 9.2 Application Guide

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

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Introduction

Overview

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

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

Core Features

Customer Support

- [Case](#) management to track service and resolution of customer issues
- [Bug](#) tracking to identify, prioritize, and resolve product issues
- [Contact](#) and [Account](#) management to track support history and enable

continuity of service
- [Sugar Portal](#) to provide clients with self-service capabilities support activities
- [Knowledge Base](#) to manage information and share it externally

Record Keeping

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

Collaboration

- Shared [Email](#) and [Calendar](#) to provide visibility across individuals and teams
- [Connectors](#) and tools to leverage third-party information regarding your prospects and clients

Reporting

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

Sugar Sell

Sugar Sell is a product geared to enhance the abilities of a successful sales organization. While there are many modules that are common across products, there are a few unique modules that a Sugar Sell user will be able to access. To learn more, please review the [Sugar Sell Documentation](#).

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Getting Started

Overview

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

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

Accessing Sugar

Prerequisites

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

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

Logging In

The Sugar login screen allows you to enter login credentials (user name and password) to access your instance. Navigate your web browser to your instance's URL (e.g. https://example.sugarondemand.com) to access Sugar's login screen. If you do not know your instance URL or login credentials, please reach out to your system administrator for assistance. The New User Wizard will launch upon your first successful log in to Sugar allowing you to configure some of your basic personal settings.
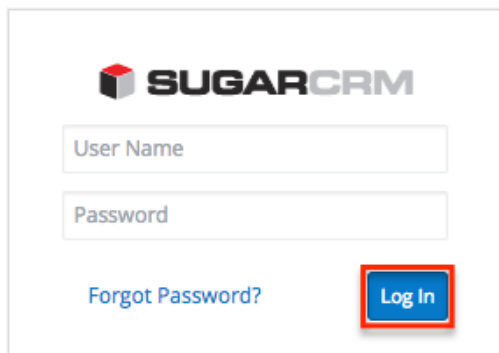
Note: If your instance has more active users than is allowed by your Sugar license, regular users will not be able to log in and a warning will be displayed on the screen once the user attempts to log in. Admin users will be able to log in but will be redirected to the Users module. For more information, see the [Understanding User Types, License Types, and Sugar Licenses](#) article.

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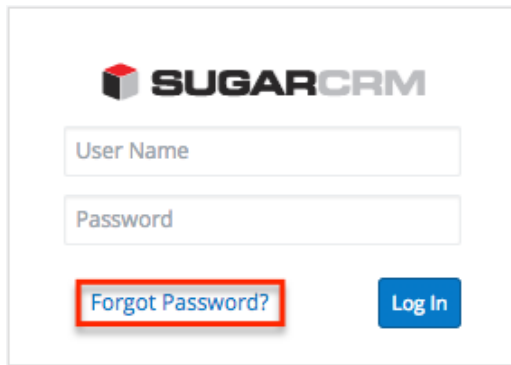
There may be occasions when users forget their Sugar password and will need to reset it. If the system administrator has enabled the Forgot Password feature via Admin > Password Management, users will have the option to request a password reset directly from Sugar's login screen. If you do not see the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

Note: For Sugar instances that use [SugarIdentity](#), administrators will not be able to configure the [Forgot Password](#) option, [change](#) the user's password, or manually send a [system-generated password](#) to the user. Users can request to reset their password by clicking the "Forgot Password?" link on the Sugar login screen.

Use the following steps to request a new password:
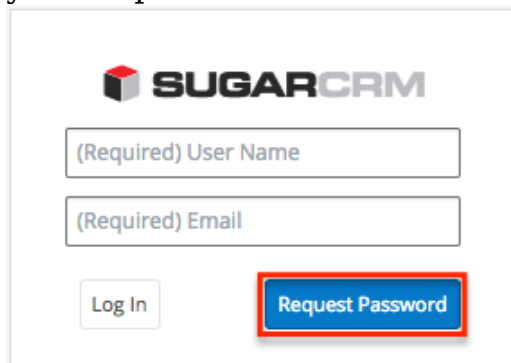
1. Click the Forgot Password? link on the bottom left of Sugar's login dialog box.

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

3. A temporary password will be emailed to your primary email address.
4. Enter the temporary password into Sugar's log in screen.
   Note: Be sure to change your password once logged in by navigating to the [Password tab](#) in your user preferences.

Setting Your Language

Users have the option to choose the primary language they want displayed in Sugar by clicking the Language link on the bottom right of the Login screen. The Language dropdown list will appear allowing you to select the appropriate language you want displayed in your Sugar account. The out-of-the-box default language is English (US), but administrators can change the default language globally via Admin > Locale. For more information on configuring the default language in Sugar, please refer to the [User Interface](#) section of the System documentation. Once the default language is changed by the administrator, it will display as the default selection on the login screen for all users.

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

The following languages are available for use in Sugar:

Albanian	Hungarian
Arabic	Italian
Brazilian Portuguese	Japanese
Bulgarian	Korean
Catalan	Latvian
Chinese (Simplified)	Lithuanian
Chinese (Traditional)	Norwegian
Croatian	Polish
Czech	Portuguese
Danish	Romanian
Dutch	Russian
English (UK)	Serbian
English (US)	Slovak
Estonian	Spanish
Finnish	Spanish (Latin)
French	Swedish
German	Thai
Greek	Turkish
Hebrew	Ukrainian

Logging Out

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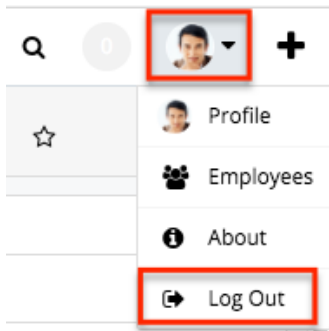
Automatic Log Outs

While working in Sugar, a user may be automatically logged out of the system. There are several valid and expected reasons that this may occur, primarily for security purposes. For more information and steps to troubleshoot this behavior, please refer to the [Troubleshooting Sugar Logging Out Unexpectedly](#) Knowledge Base article.

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

New User Wizard

When users first log in to Sugar, they will step through the New User Wizard to configure some basic settings (i.e. Your Information, Your Locale). If the system administrator already configured your basic settings when adding you as a user to Sugar, the fields in the wizard will be populated with the provided information. You can update your information as you go through the New User Wizard to make any necessary changes. Please note that you can skip the steps in the wizard if you wish to configure the settings via your user preferences at a later time.

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

Configuring Your Information

The User Profile step of the New User Wizard allows you to enter basic information (e.g. name, email address, phone) about yourself to be stored in your user profile.

Please note that the information provided in this step can be updated in your user preferences at a later time if desired. For more information on configuring your personal information, please refer to the [User Preferences](#) section.

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

The following options are available to configure your user profile:

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

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

Configuring Your Locale

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

The following options are available to configure your locale settings:

- **Time Zone** : Select the time zone based on your current geographical location.
- **Date Format** : Select the format you want the date stamps displayed in

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

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

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

Tour

You can launch the Welcome to Sugar tour on the Home page if you wish to see key features of the user interface. Simply click the Help link in Sugar's footer then click "Tour" in the help pane. The Welcome to Sugar window will appear and include links which provide access to additional resources (e.g. training,

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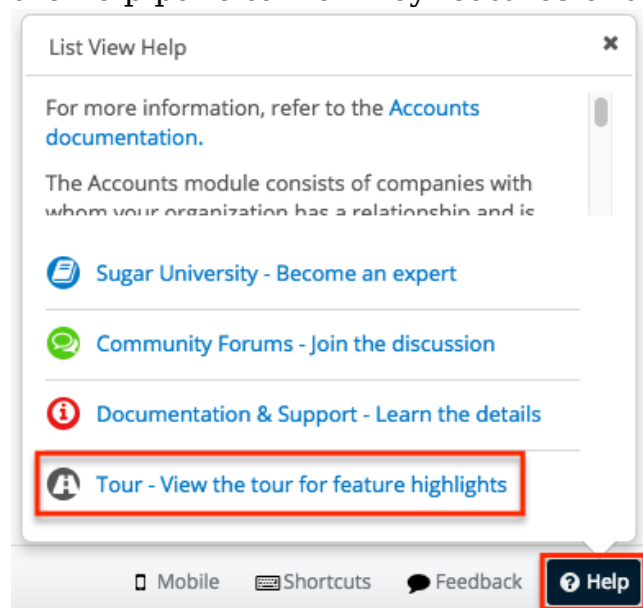
User Preferences

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

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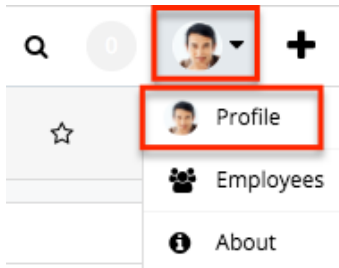
User Profile Tab

The User Profile tab displays basic information such as your name, license type, email address, etc. If the New User Wizard was completed, the information you entered will appear under the User Profile tab. For Sugar instances that use SugarIdentity, the [User Profile](#) step of the User Wizard is read-only and the displayed fields can only be edited by administrators in [SugarIdentity](#) via the Cloud Settings console. The system administrator can also enter the user's basic information when creating the user via Admin > User Management. For more information on creating new users, please refer to the [User Management](#) documentation. Your personal information on this tab is grouped by default into the User Profile, Employee Information, and Email Settings sections. To enter or update your information, simply enter the appropriate values for the fields then click "Save" to preserve the changes.

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

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

User Profile

The User Profile section displays your Sugar name, user name, status, user type, avatar, and license type. Of these fields, regular users can only modify First Name, Last Name, and Avatar; the rest are set by Sugar administrators as described in the [User Management](#) documentation. Each user must have one or more Sugar

products selected in their License Type fields. This field controls what functionality you may access. When working in Sugar or learning about the features available to you, view your profile to confirm your license type(s). A list of functionality available for each license type is listed in the User Management documentation.

Employee Information

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

Email Settings

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

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

The Email Settings section contains two fields:

- **Email Address** : Enter your primary email address.
  - Sugar refers to the primary email address in the user's profile to send messages such as password-reset emails, record-assignment notifications, and workflow alerts to users.
  - Users can add multiple email addresses in email settings, but only one can be marked "Primary".

- If the administrator has enabled the system email account for users, the primary email address will be displayed when the user sends outbound emails via the system email account.
- Outgoing email accounts (e.g. support@example.com) that are used to send outbound email messages will get added to the Email Address field as Sugar links the user to that email address since they used it to send an email message through Sugar.
- **Email Client** : Select how you would like to send email from Sugar.
  - **Sugar Email Client** (most common) : To send messages through the Sugar application and automatically archive them in Sugar, you must select "Sugar Email Client" from the Email Settings section of your user profile. This is the default setting.
    - **Note**: To send email from Sugar, you must configure your outbound email server via [Emails > Email Settings](#) or, if using the system email account to send email, the system's outbound email server must be configured by an administrator via Admin > [System Email Settings](#).
  - **External Email Client** : Users can choose this option if they would like to send email from an application outside of Sugar (e.g. Microsoft Outlook, Gmail). If you choose the External Email Client option, emails sent to contacts, leads, etc. will not be saved in Sugar as archived emails unless you use the Sugar Email Archiving service (a.k.a. "SNIP") or a Sugar connector such as the Outlook Plug-in or a third-party connector like Collabspot.

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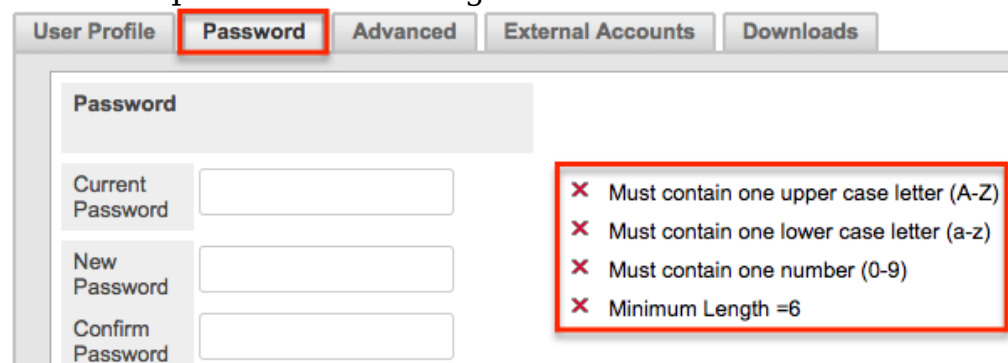
Password Tab

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

Note: For Sugar instances that use [Sugaridentity](#), the Password tab will not be available to change a user's password. Users will need to click the "Forgot Password?" link on the login screen if they wish to reset their password.

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

Advanced Tab

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

User Settings

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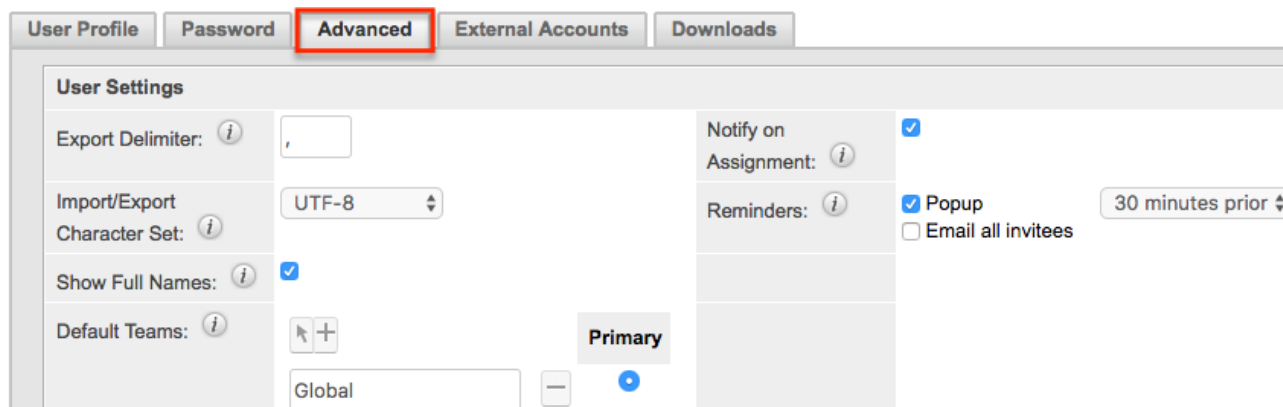
The options available to configure in the User Settings section are as follows:

- **Export Delimiter** : Specify the character used to delimit exported data from Sugar. By default, the comma is used to separate exported data in Sugar.
- **Import/Export Character Set** : Select the default character set used for data import, data export, and vCard generation. By default, UTF-8 (US or Western Europe region) is selected as the import/export character set.
  - Please be sure to select the proper character set based on your locale setting in Sugar. This will make sure that the character set between Sugar and your local machine matches when you export data, import data, or generate PDFs.
- **Show Full Names** : Check this box if you would like your full name (e.g. John Smith) instead of your assigned user name (e.g. jsmith) displayed in Sugar. If enabled, your full name will appear in the My Activity Stream dashlet, Assigned to fields, and on the upper right of your Sugar account.
- **Default Teams** : Select the default team(s) that will be automatically assigned to new records you create in Sugar. Whenever you create a record, the team is set as your default team, similar to how the "Assigned To" field is set to you. You can have any number of default teams. When selecting a default team set, you must select one team as the primary team and, if the Administrator has enabled team-based permissions, you may optionally indicate whether the teams on each set should be automatically set to "selected" (Additional Permissions Enabled).
- **Notify on Assignment** : Check this box to receive an email notification when a record is assigned to you by another user. Both the outbound mail server and personal email settings must be configured in order to receive the notification. For more information on configuring the outbound mail server, please refer to the Email documentation.
- **Reminders** : Mark the popup or email reminder checkbox to set default reminders for calls and meetings. Once marked, you can select the default reminder time (e.g. 10 minutes prior) to send reminders to invitees.

Layout Options

The Layout Options section allows users to select what modules they want Sugar to display or hide in the navigation bar.
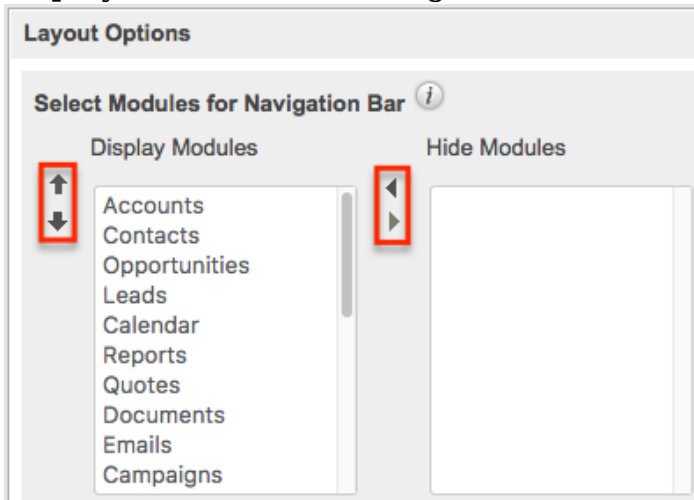
The options available to configure in the Layout Options section are as follows:

- **Select Modules for Navigation Bar** : Select which modules will be displayed or hidden in the navigation bar by using the left and right arrows to move modules between the Display and Hide Modules column. You can also designate the order of the modules displayed in the navigation bar by selecting the module in the Display Modules column and clicking the up and down arrows.

Locale Settings

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

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

- **Date Format** : Select the format you want the date stamps displayed in Sugar.
- **Show Preferred Currency** : Mark the checkbox to convert the base currency to user-preferred currency in list views and record views.
  Note: User-preferred currency is not used in the Quotes record view or for quoted line items. For more information, refer to the [Quotes](#) and [Quoted Line Items](#) documentation.
- **Time Format** : Select the format you want the time stamps displayed in Sugar.
- **Time Zone** : Select the time zone based on your current geographical location.
  - Please note that if the selected time zone is different from your browser's set time zone, a warning message ("Your browser's timezone does not match your saved timezone Adjust Your Timezone.") will appear upon your next log into Sugar. You can click the link in the warning dialog box to change the time zone in your user preference accordingly.
  - **Note**: This Time Zone setting only applies to modules using the Legacy user interface. Modules using the Sidecar user interface will utilize the browser's time zone.
- **Name Display Format** : Select the format you want the concatenated name fields displayed in Sugar's list view and record view.
- **Preferred Currency** : Select the default currency you wish to use when creating new records.
- **Create Revenue Line Items in Preferred Currency** : Mark the checkbox to use your preferred currency when creating revenue line items based on a product catalog item, rather than the default behavior of using the product catalog item's currency.
- **System Significant Digits** : Select how many digits will appear after the decimal symbol for currencies.
- **1000s Separator** : Enter the default character used to separate numeric values in the thousands.
- **Decimal Symbol** : Enter the default character used as the decimal symbol.

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

PDF Settings

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

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

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

Calendar Options

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

- **Publish Key** : The publish key is used to uniquely identify a user's calendar and sync Sugar's calendar to external calendar applications (e.g. Google Calendar, Apple Calendar). A system-generated alphanumeric value (e.g. 948fc65a-9c89-a11f-b40c-5) is displayed by default, but users can change this key (e.g. mysecretkey) to whatever they wish. The Publish at my location site, Search location, and iCal Subscription URL all reflect the publish key within the URL.
- **Publish at my location** : Use this URL to sync free/busy information for meetings from Microsoft Outlook to Sugar. This is helpful when scheduling meetings in Sugar as you can view the user's free/busy information to avoid scheduling conflicts.
- **Search location** : Use this URL to sync free/busy information for meetings

from Microsoft Outlook to Sugar. This is helpful when scheduling meetings in Sugar as you can view the user's free/busy information to avoid scheduling conflicts.

- **iCal Subscription URL** : Use this URL to integrate the external calendar application with your Sugar calendar.
- **First Day of Week** : Select the first day of the week that will display in Week, Month, and Year views when viewing your Sugar calendar. This setting also applies to calendar pickers which display when users are setting a value for a date field (e.g. Expected Close Date).

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

1. Navigate to the Advanced tab in your user profile and scroll down to the Calendar Options section.
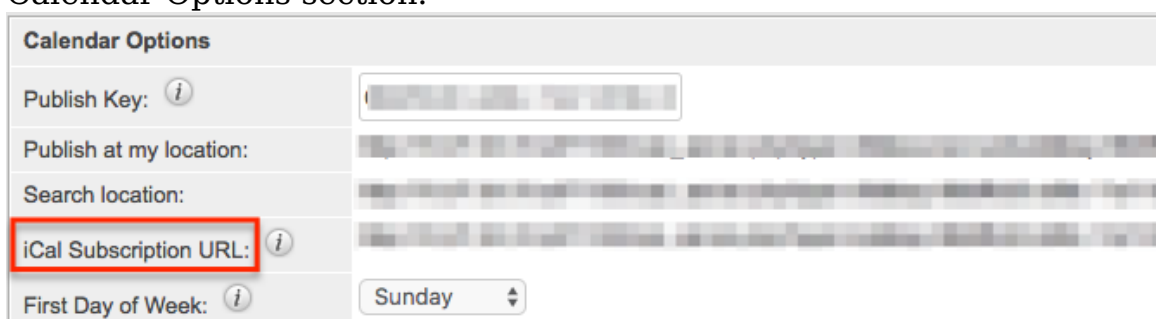
2. Copy the iCal Subscription URL then paste the value into your iCal compatible calendar application.
    - For Apple Calendar:
        - Click "File" then select "New Calendar Subscription".
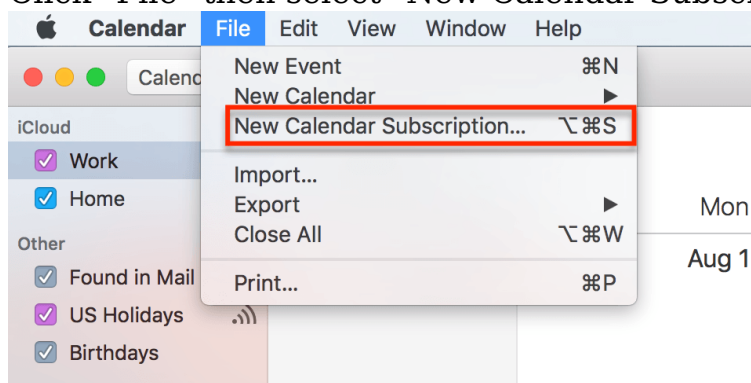
        - Enter the iCal Subscription URL and click "Subscribe".
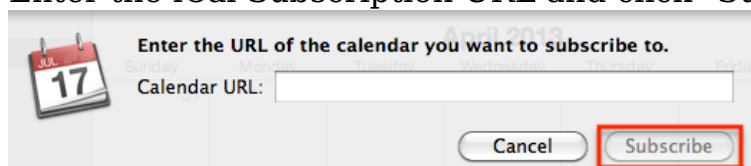
    - For Google Calendar (https://www.google.com/calendar):
        - Click "Other Calendars" then select "Add by URL".

- Enter the iCal Subscription URL and click "Add Calendar".

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

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

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

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

External Accounts Tab

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

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

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

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

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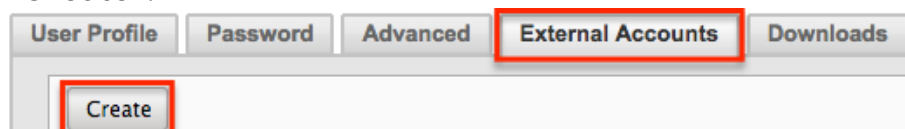
2. Select "Google" in the Application field then click the Connect button.
   - **Note**: If the Google option is not available to select in the Application field, the Google connector may not have been configured properly via Admin > Connectors. Please reach out to your Sugar administrator to have the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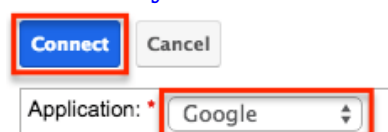
3. After clicking "Connect", a pop-up window will appear. Click "Allow" to grant permission for the connection to occur.
   - Google's login screen may appear inside the pop-up if you are not already logged in to your Google account in the active browser window. Simply enter your credentials then click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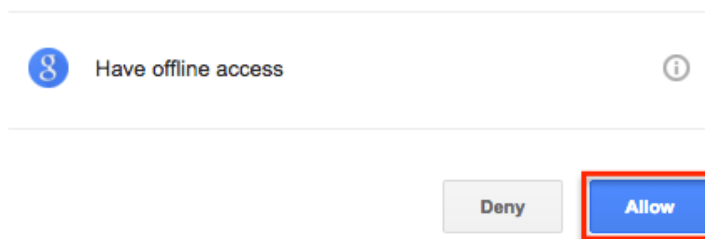
The Google application is now connected to your Sugar account and will appear under the External Accounts tab. Please note that for Google, GoToMeeting, and WebEx, you can only be connected to one account per application in Sugar.

Access Tab

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

Access Table

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

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

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

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

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

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

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

- **All** : The user will be able to perform this action on any and all records that can be accessed.
- **Owner** : The user will only be able to perform this action where the Assigned To field is set to be this user.
- **Not Set** : Does not restrict or grant access to this function and actions default to having "All" access when selected.
- **None** : The user is not able to perform this action while using this module.
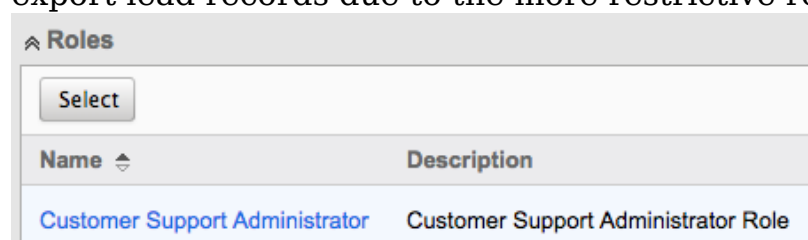
	Access	Access Type	Delete	Edit	Export	Import	List	Mass Update	View
Accounts	Enabled	Admin & Developer	Owner	Owner	Owner	All	All	All	All
Bugs	Enabled	Normal	None	All	Owner	All	All	All	All
Calls	Enabled	Normal	All	All	All	All	All	All	All

Roles

Sugar Roles define permissions for users such as what kinds of records they can access and what level of access they are allowed. Roles work in conjunction with teams to form a robust security model for non-admin users in Sugar. Roles control three different layers of access for users within Sugar: module, field, and action-level access. Please note that only users who are assigned to the specific role will be able to perform actions (e.g. view, edit, delete) defined by it. For more information on the various actions and setting options for roles, please refer to the Access Table section. Users who are not assigned to a role can access and perform actions in any module as long as they are assigned to the record or a member of the team assigned to manage it. System administrators have the ability to create various roles and assign additional roles to users via Admin > Role Management. For more information on creating and assigning roles, please refer to the Role Management documentation.

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

Roles	
Select	
Name ⇕	Description
Customer Support Administrator	Customer Support Administrator Role

My Teams

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

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

Downloads Tab

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

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

User Holidays

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

Resetting a User's Preferences

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

From edit view:

From detail view:
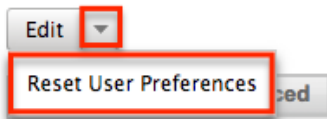
Accessing Support

The SugarCRM Support page provides access to various Sugar Support resources such as the case portal, documentation, knowledge base, etc. Users can easily access the support page by clicking the Documentation & Support link in Sugar's help pane. To access Sugar's Support page outside of your instance, go directly to the SugarCRM Support site on your web browser.
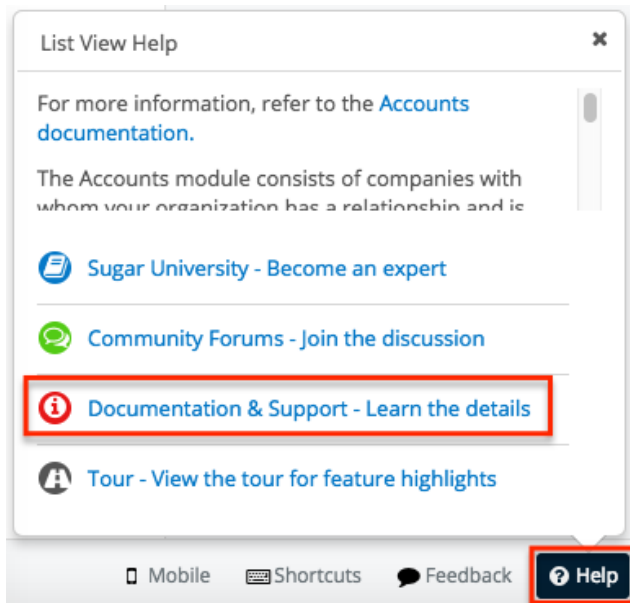
The Get Started section of the Support page provides users, administrators, and developers with the appropriate resources to get them started in configuring, customizing, and utilizing the application. The Documentation and Knowledge Base sections provide access to Sugar's self-help area where you can learn how to use various parts of the application via online documentation and knowledge base articles. The Knowledge Base provides articles based on specific topics and areas of Sugar while the Documentation goes over the entire Sugar application in detail.

The Resources section provides key information such as: supported versions and platforms to ensure you are running Sugar in the best performing environment, customer resources to help you manage your Sugar subscription, view/download purchased orders, access the bug and case portal, etc. In addition, it provides guidelines for deploying Sugar on-site and requirements for setting up development environments.

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

Viewing Instance Information

Users can find information regarding their version and build of Sugar by clicking their user name on the upper right of Sugar and selecting "About". For example,

this will be useful if you need to confirm the current product and version of your instance.
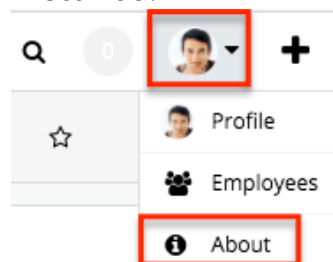
Last Modified: 2020-01-28 18:22:57

User Interface

Overview

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

Sidecar Modules

This page covers the user interface that was introduced in Sugar 7 called "Sidecar". A few modules continue to use the Legacy user interface which is described in detail in the User Interface (Legacy) documentation. Custom modules created in Module Builder will utilize the Sidecar user interface. Custom modules installed to an instance prior to Sugar 7 that were not created in Module Builder will use the Legacy user interface upon upgrade to 7.x and above.

Navigation Bar

All pages within Sugar display a navigation bar spanning across the top of the screen. The navigation bar allows you to access the various modules (e.g. Accounts, Contacts, etc.), access your Home page, perform a global search, etc. You can configure the navigation bar via your user preferences to select which

modules you want to display as well as their order. For more information, please refer to the [Layout Options](#) section of the Getting Started documentation.

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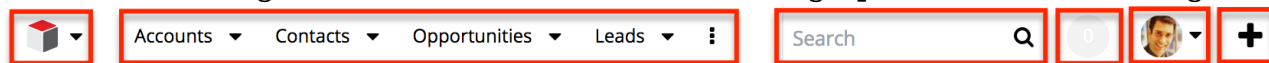
Navigation Bar Item	Description
[Home](#)	Click the Sugar Cube icon on the upper left to access your Home page dashboards as well as your Activity Stream.
[Module Tabs](#)	Both stock and custom modules can be displayed in the navigation bar. Click the module name to open its list view or click the triangle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

Home

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

Module Tabs

Module tabs are located to the right of the Sugar cube icon on the navigation bar at the top of any Sugar screen. To access a specific module's list view, simply click the module's name. You may also click the triangle to the right of the name to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of records you last viewed in the module. The Favorites menu displays the list of records you most recently marked as favorites in the module.
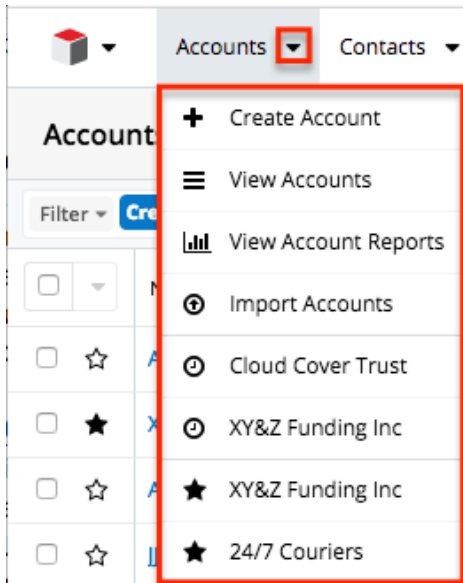
The number of displayed module tabs depends on your screen resolution as well as the size of your browser window. When your available modules do not fit within the navigation bar's width, clicking the overflow icon (three stacked dots) to the right of the displayed modules allows you to select and navigate to the list view of the additional modules.
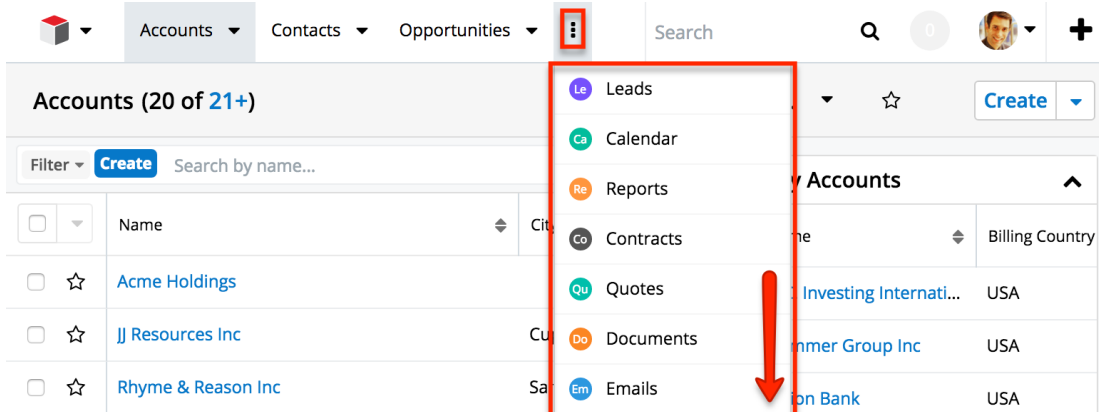
If you do not see a particular module tab in Sugar, please check the following:

- The module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user menu (upper right of Sugar), click "Profile", click the Advanced tab, and check the Layout Options section. If you see the module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the module for your entire Sugar instance. Reach out to your Sugar administrator to have the module displayed. For more information on displaying and hiding modules

throughout Sugar, please refer to the [Developer Tools](#) documentation.

Global Search

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

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

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

Notifications

Sugar notifications relay key messages, warnings, and alerts that are relevant to the current user. The Notifications indicator is located in the top right corner of the screen next to the global search bar; the number displayed represents how many messages have a status of Unread. If you are logged in to Sugar using the Chrome or Firefox browser, the SugarCRM cube icon in your browser tab also displays the count of unread notifications. When the notification count changes, the icon's count will be updated within 5 minutes of the change or upon reloading the tab.
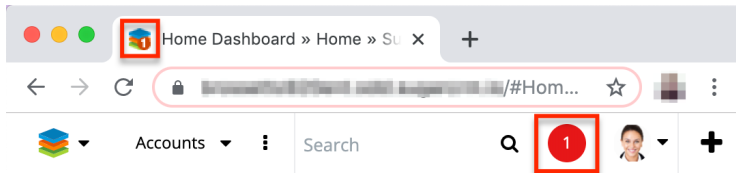
Clicking the number in Sugar opens a dropdown menu displaying your most recent unread notifications. Click any notification to open it in record view, or click "View Notifications" to open the Notifications list view. A notification is automatically marked as read when it is opened in record view or previewed from list view. If you wish to toggle its status between Read and Unread, simply click the status field in list view, record view, or preview. To change the status of multiple notifications at a time (e.g. to mark several notifications as read), you can also mass update the records from list view.
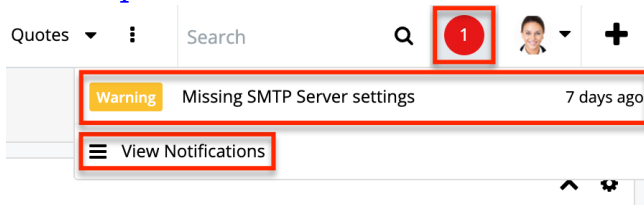
If a notification requires action within Sugar, a link may be included in the Description field, shown in record view or when previewing the notification. Clicking the link takes you to the related record or the area where action is needed.

Notification Severity Levels

Each notification can have one of four severity levels:

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

User Menu

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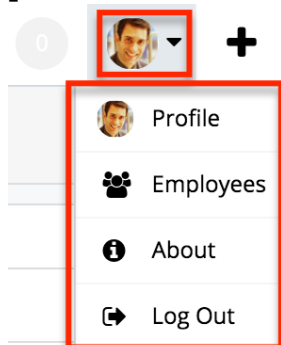
The user menu allows you to perform the following operations:

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

	Note: Every user is listed as an employee; however, every employee may not be a user in Sugar.
Admin	Navigate to the Admin page to configure and customize various aspects of your Sugar instance. **Note**: This option is only available if you are an administrator user or have or developer-type role access.
About	Navigate to the About page to view your instance's current Sugar product, version, and build, as well as resources and source code references.
Log Out	Log out of your current user session. You will be directed back to the Sugar login page for your instance.

Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the Plus button on the upper right of any Sugar page to access the menu. Please note that a maximum of ten modules may be enabled to display in the Quick Create menu. Administrators can configure which modules are enabled and the order in which they appear via Admin > Configure Navigation Bar Quick Create. For more information, refer to the Developer Tools documentation.
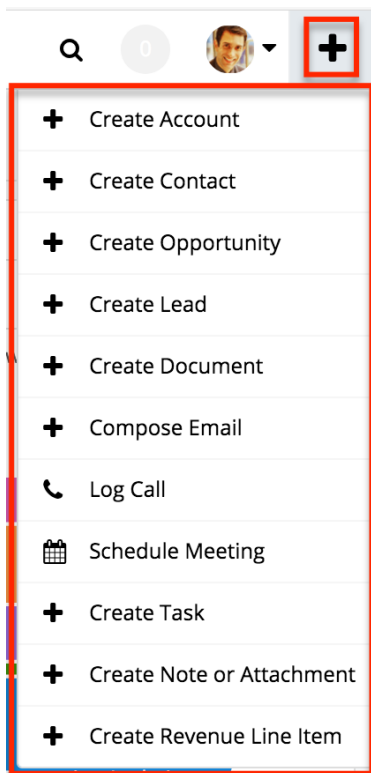
Clicking on an item in the Quick Create menu will open the record view form for the specific module. When using quick create while viewing an existing record where a relationship exists between the two modules, Sugar automatically relates the new record to the one being viewed. For example, if you are viewing an account, ABC Company, and create a new contact via quick create, the Account Name field in the new contact will automatically populate with "ABC Company", thus creating the link between the two records.

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

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

Footer

Sugar's footer displays the SugarCRM logo, Mobile link, Shortcuts link, Feedback

link, Help link, as well as links to enabled third-party integrations. Users can click these links to go back to their Home page, access the help pane, etc.
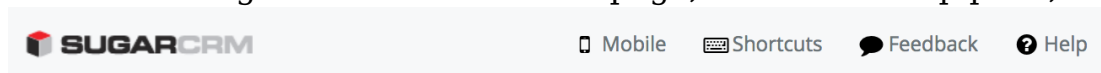
The following links are available in Sugar's footer:

- **Logo** : Click the logo on the bottom left of Sugar to return to your home page. Administrators can replace the SugarCRM logo with a custom logo via Admin > System Settings. For more information, please refer to the System Settings documentation.
- **Widgets** : Links for any installed third-party integrations will appear to the right of the SugarCRM logo.
- **Mobile** : When viewing Sugar via a touch-screen device, the Mobile link will appear allowing you to view Sugar's mobile site.
- **Shortcuts** : Access the Keyboard Shortcuts help page to view the various shortcut keys available to use along with a description of the actions they perform. For more information regarding the Keyboard Shortcuts help page, please refer to the Accessibility documentation
- **Feedback** : The Feedback window will pop up allowing you to communicate your overall satisfaction with Sugar. Once you have entered the necessary information, simply click "Send" to submit your feedback
- **Help** : Access the help pane via the Home page or a Sidecar module's list view/record view (e.g. Accounts) by clicking the Help link. The top of the help pane provides a brief introduction to the current module and includes a link to the module's corresponding documentation. In addition, the following learning resource and Sugar 7 tour links are available in the help pane:
  - **Sugar University** : Opens the Sugar University page where you can access information regarding online and live training, the Sugar certification program, etc.
  - **Community Forums** : Opens the Community Forums page where you can collaborate with other users, Sugar partners, and Sugar employees to ask questions as well as participate in active discussions, help solve problems, etc.
  - **Documentation & Support** : Opens the SugarCRM Support page where you can access the case portal, documentation, knowledge base articles, etc.
  - **Tour** : Launches a quick tour to show key features of the user interface for the home page and Sidecar module page (e.g. Accounts) you are currently viewing. For more information regarding the Sugar 7 tour, please refer to the Tour section of the Getting Started documentation.

Field Types

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

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

Checkbox Fields

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

Comment Log Fields

The Comment Log field allows users to add messages, comments, or other text to a

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

Comment Log

Sarah Smith 2019-07-22 14:17
Found nothing in the logs.
Max Jensen Can you please take this case?
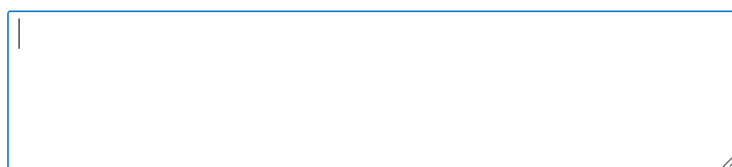
Max Jensen 2019-07-23 08:10
Assigned to me. Looks like it may be related to
Warning message when using the wrong browser

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

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

Tagging Users in Comment Log Entries

Users can be tagged in comment log entries to insert a link to their employee record in the form of a clickable pill; the tagged user also receives a **notification** in Sugar. To tag a user, type the @ symbol followed by at least the first two characters of the first or last name. A list of matching users will appear below the text area; select the user you wish to tag and the tag will be added to the entry. Upon saving, the tag will be displayed as a clickable pill.

Comment Log

```
@sa|
```

| Us | **Sa**rah Smith |
| Us | **Sa**lly Bronsen |

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

If the user you are trying to tag does not have access to the record, their name will be disabled in the list of results that match your criteria. It will say "No access" next to them and you will not be able to tag the user.

Linking to Records in Comment Log Fields

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

Comment Log

```
#aro|
```

Co	Hector M**aro**ney
Co	D**aro**n Bustillos
Co	**Caro**lina Guardiola
Le	**Caro**lynn Haigler
Le	D**aro**n Arias
PC	**Caro**lyne Gadget
PC	**Caro**lynn Gadget

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

Date Fields

Date fields allow users to specify a particular date by either typing a date in the provided format or clicking the Calendar icon and selecting it via the date picker. Click the month and year (e.g. "January 2018") to select the desired month or use the arrows to navigate to the desired month. To set the year, click the month and year at the top of the picker, then click the year at the top of the picker, and then select the desired year. Once the month and year are set, click the desired date below to set the date and close the picker.
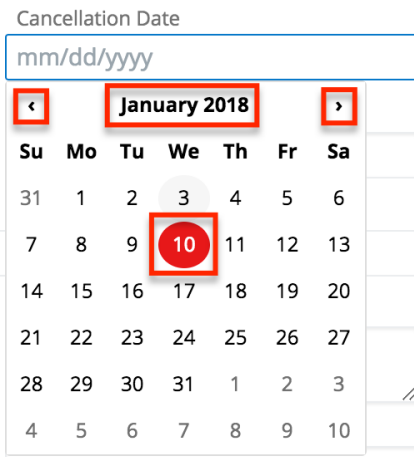
Datetime Fields

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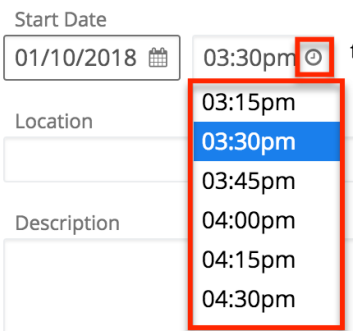
Dropdown Fields

Dropdown fields provide a list of values where only one value can be selected at a

time. The list will be collapsed to only display the selected value except during editing, making it appropriate for longer lists of values. Click the selected value to see the full list. Clicking the desired value will replace it as the selected value.
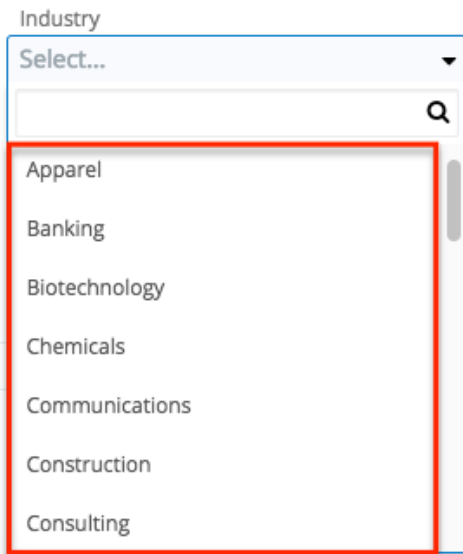
Email Address Fields

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

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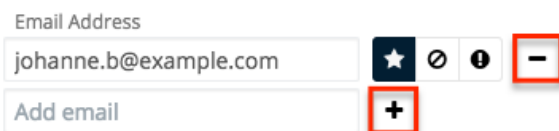
- **Primary** : A white star with a black background represents the primary email address on a record. This will be the default address that Sugar will find when the record is included in email campaigns and other send-message events performed within the application. On a given record, only one email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

- **Opted Out** : The button with a slashed circle indicates whether or not an email address has been opted out from email marketing campaigns. Sugar automatically opts-out an email address when a recipient clicks the opt-out link in an email-type campaign message. When enabled, the button will have a black background. Administrators can configure whether new email

addresses added to Sugar records default to opted-in or opted-out by using the "Opt-out new email addresses by default" option via Admin > System Email Settings.

When an opted-out email address is saved, the opt-out status is indicated by a blue circle with a line through it. Opted-out email addresses also display a Link button in record view. Clicking this button will copy a link to your computer's clipboard which you can send to the email address owner in order to request that they confirm their desire to receive marketing emails from your organization. When the copied link is visited in a web browser, Sugar will automatically set the email address to opted-in.
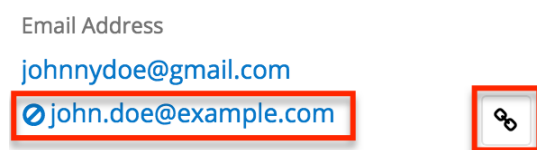
Please note that opted out email addresses are only blacklisted from campaigns, so users can continue to send them transactional emails via the Emails module. For more information about email opted-out email addresses, refer to the Emails documentation.

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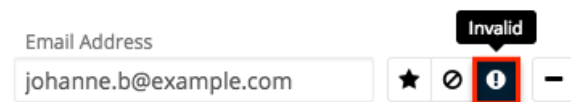
Flex Relate Fields

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

Integer Fields

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

Number of Employees

1,800

Multiselect Fields

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

Radio Fields

Radio fields provide a list of values where only one value can be selected at a time.

The entire list of all values will be displayed at all times, making it appropriate for shorter lists of values. Click the circle of the desired value, and any previously selected value will be deselected automatically.

Number of Employees

○ 1-100

○ 101-200

● 201-300

Relate Fields

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

Account Name

Required   ▼

                                   🔍

Search and Select...

Tags Fields

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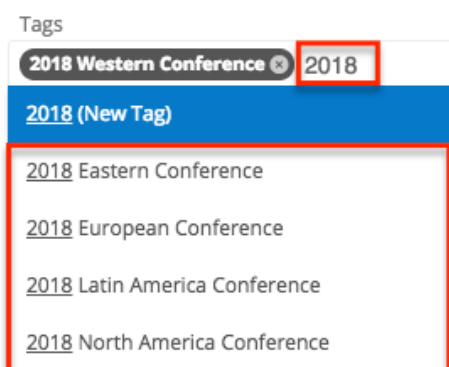
Teams Fields

The Teams field specifies which teams of users have access to view the record. An individual team selection works like a dropdown field which is described above. Click the Plus button to add additional teams to the record or the Minus button to remove a team. Click the Star button to set the primary team. For more information on teams, please refer to the [Team Management](#) documentation.
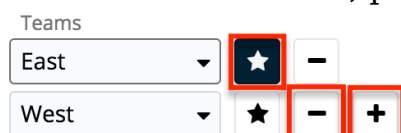
Note: If your administrator has enabled team-based permissions, you may also see a Lock button or a "Selected" box on the Teams field. Please refer to the [Using Team-Based Permissions](#) section of this page for more information.

Text Fields

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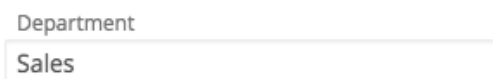
Text Area Fields

Text area fields allow users to enter large amounts of text by clicking on the field

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

Creating Records

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

Basic Record Creation

The most common method of record creation is via the individual module itself using the Create button in the list view or the Create {Module} option in the module tab. This opens the record view layout in edit mode which allows you to enter all of the desired information.

The following steps cover creating an account via the Accounts module as an example:

1. Click the triangle in the Accounts module tab to open the actions menu and select "Create Account". You can also click the Create button on the upper right of the Accounts list view.
   - From Accounts list view:
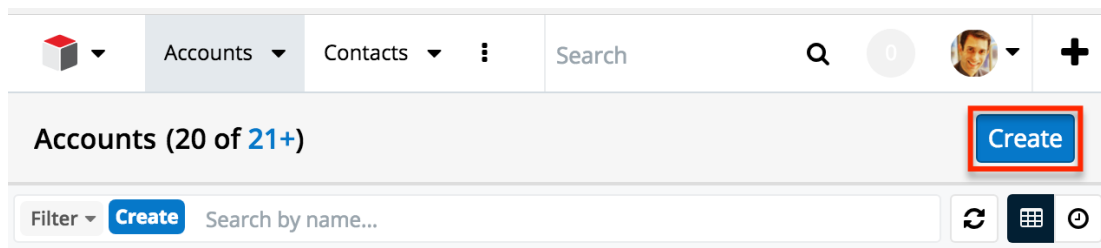
   - From Accounts module tab:
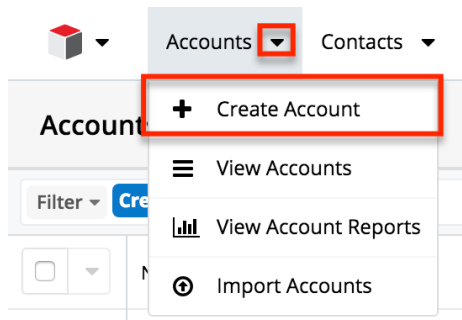
2. Enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

Creating via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick-create button on the upper right of any Sugar page to access the menu.

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

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

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Account".
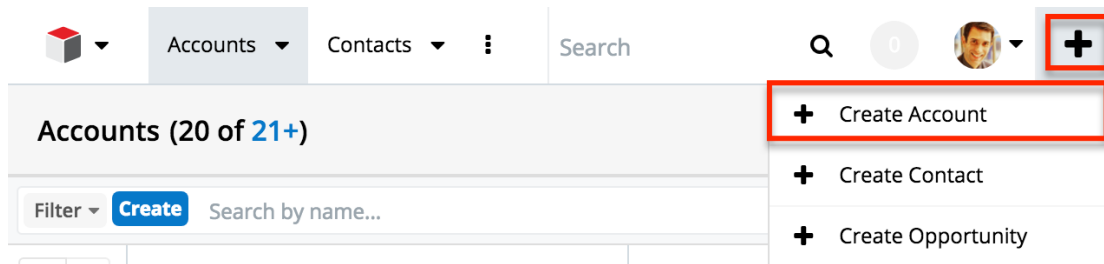
2. Enter appropriate values in the fields in the record view form. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

Creating via Subpanels

On [record views](#), beneath a record's fields, subpanels appear which contain related records from various modules. You can create a related record as well as link an

existing record directly from the subpanel.

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

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

1. Click the Plus button on any Contacts subpanel on a related module's record view.
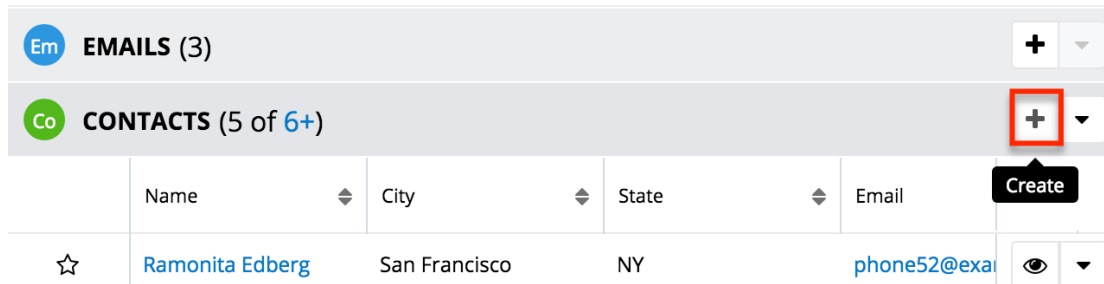
2. Enter appropriate values in the fields in the record view form. All required fields will indicate "Required" in the field and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

Creating via Duplication

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

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

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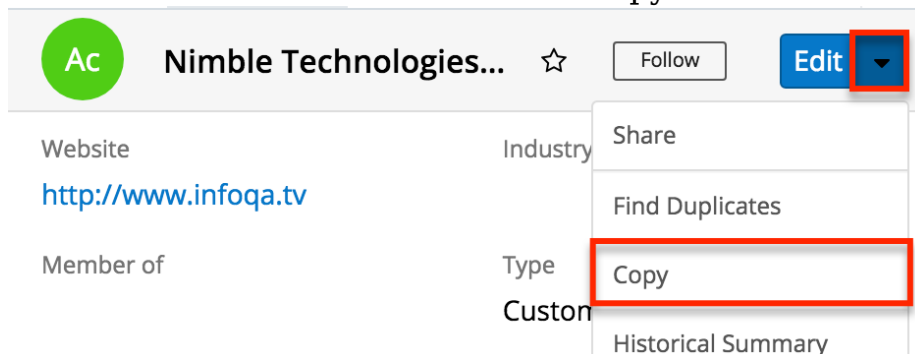
3. The displayed record view is pre-populated with the original account's values. Update the necessary fields, then click "Save".

Importing Records

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

The following steps cover importing accounts as an example:

1. Click the triangle to access the Actions menu in the Accounts module tab and select "Import Accounts".
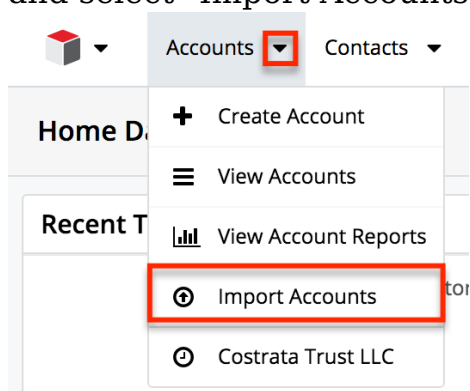
2. In Step 1, select the import file and choose "Create new records only". Click "Next".
3. In Step 2, confirm the import file properties. Click "Next".
4. In Step 3, confirm the field mappings for the import. Click "Next".
5. In Step 5, view the import results.
   - The Created Records tab will show all of the new account records.
   - The Duplicates tab will show any records in the file that were identified as duplicates of existing records and thus not imported.
   - The Errors tab will show records that were not imported due to errors detected during import.

Viewing Records

Sugar records can be viewed from a variety of locations including via the module's list view, record view, Recently Viewed menu, dashlets, and reports. Please note that you will only be able to see records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation.

Viewing via List View

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

Viewing via Record View

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

Viewing via Tile View

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

Viewing via Recently Viewed

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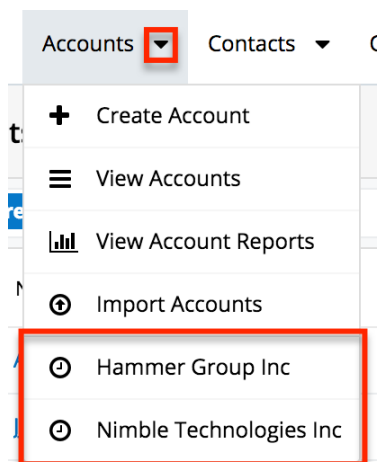
Viewing via Dashlets

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

Viewing via Activity Streams

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

Clicking the record's name link will open its record view. You can also preview the record directly from the activity stream by clicking the [Preview](#) button to the right of the post. For more information on viewing records via the activity stream, please refer to the [Activity Streams](#) documentation.
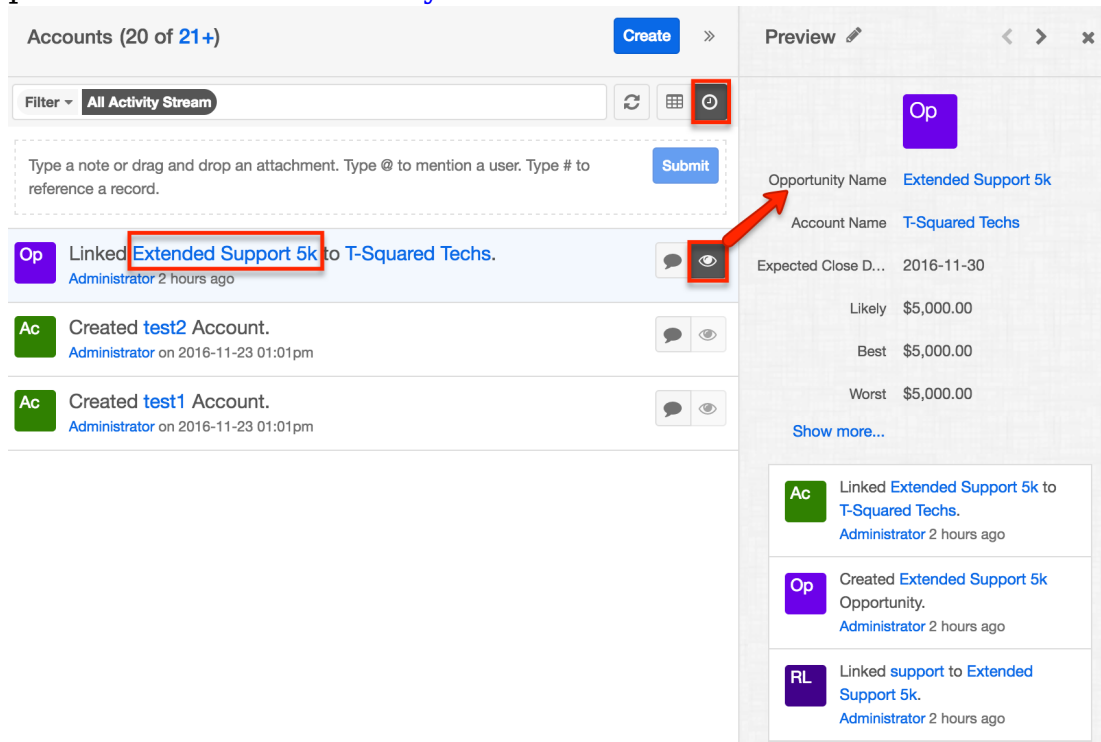
Note: Sugar's activity streams are disabled by default, but administrators can globally enable the functionality based on their organization's needs. For more information, refer to the [System](#) documentation in the Administration Guide.

Viewing via Preview

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

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

Viewing via Reports

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

In addition to navigating to the Reports module and finding or building relevant reports, you can use the View {Module} Reports option to see only the reports based on the desired module.
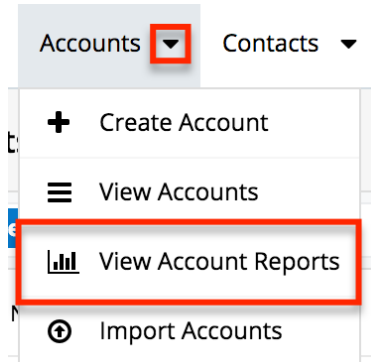
Please note that your ability to access reports may be restricted by a role. For more information on roles, please refer to the Role Management documentation. Check with your system administrator if you cannot access the Reports module.

Searching for Records

Each module's list view includes a list view search to help you easily locate records in a module-specific manner. Matching records will be displayed in the list view below. Global search allows users to search for information across their entire Sugar database rather than restricting searches to a specific module. In both searches, Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

Global Search

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

List View Search

List view search enables users to easily search by the record's name within an individual module and pull up matching records in the list view. The search also provides a Filter option allowing you to narrow your search further using the

available options as follows:

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

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

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

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

To see all account records to which you have access, simply select the All Accounts option in the filter and remove any text from the search bar:
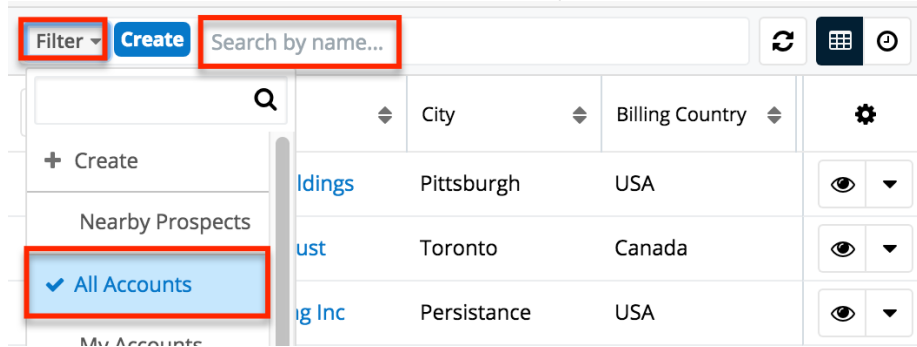
To clear an applied filter, click the "x" on the selected filter option (e.g. My Accounts) in the Search box; to clear a text query from the search, click the "x" on the right end of the search box:
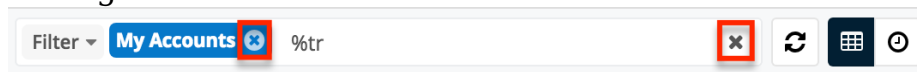
To update the filtered list view with the most recent results, click on the Refresh icon to the right of the search box:
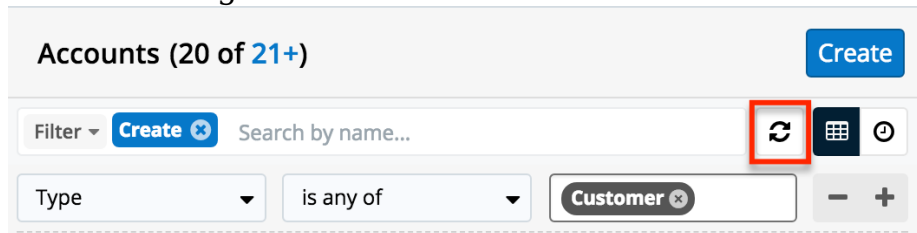
Please note that you will only be able to see records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation. Administrators can configure what fields appear on the List View Search via Admin > Studio for certain modules. For more information on editing layouts, please refer to the [Studio](#) documentation.

Creating a Filter

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

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

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

1. Click the Filter option on the Accounts search bar then select "Create".
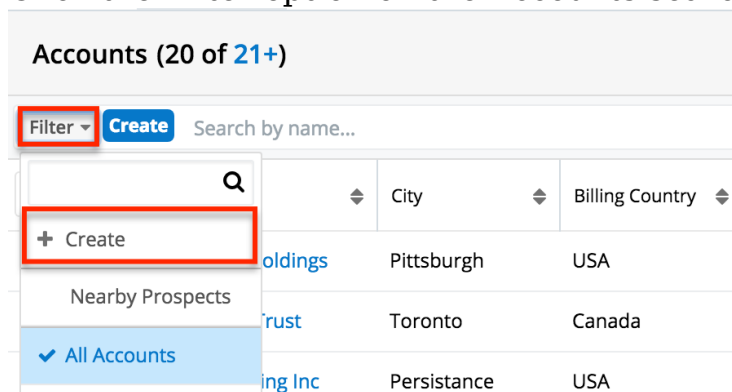
   ○ You can also click "Create" to the right of the Filter option.
2. Select the field you wish to add to your filter as well as the condition and matching criteria.
   ○ **Note**: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
   ○ To remove fields from the new filter, click the Minus button to the right of the filter.
   ○ To clear any filter values (e.g. Will Westin), simply click the "x" to the right of the value or select "Reset" to the left of the Save button.
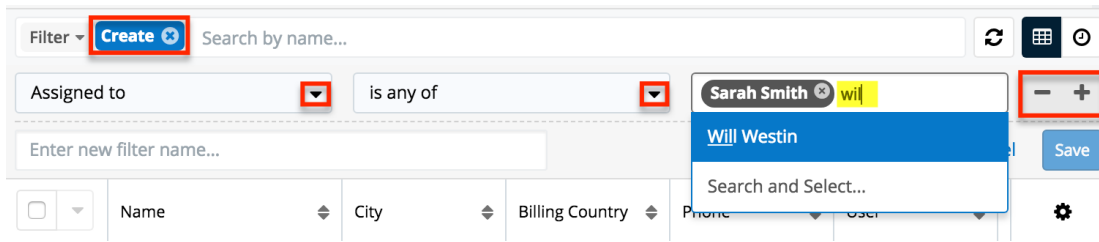
The list view will automatically display results matching your filters as you create and modify the criteria. To view the most recent matching records for an existing filter, click on the Refresh button to the right of the search box.

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

Saving a Filter

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

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

1. Create a [new filter](#) to perform a search on your desired fields.
2. Enter a name for the new filter (e.g. "Accounts assigned to Sarah and Will").
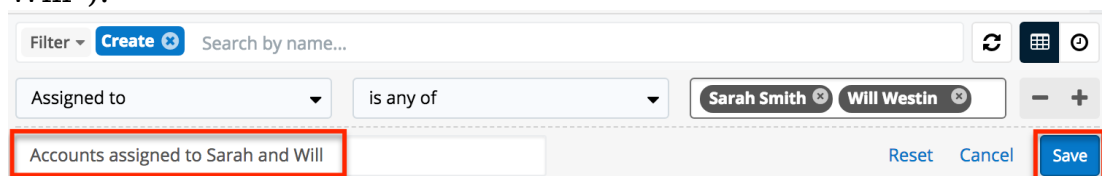
3. Click "Save" to add this filter to the module's Filter options.

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

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

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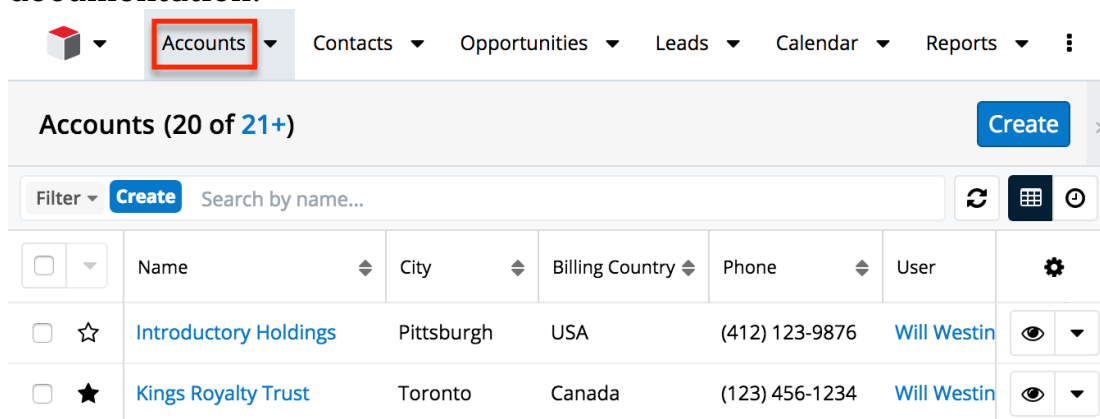
on the Search bar, then clicking "Delete" on the filter details panel.

List View

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

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

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

Total Record Count

The list view displays the total count of records (e.g. "20 of 21+") on the upper left of the page next to the module name (e.g. Accounts). The count will capture the total number of records displayed on the current set of list view results. If there are additional records in the list view results set, a hyperlinked number (e.g. "21+") will display to the right of the initial count. Simply click the hyperlinked number in the parentheses to view the total count of all records in the list view result set.
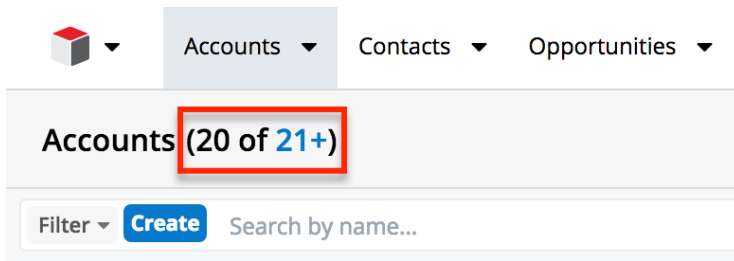
Please note that, by default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information, please refer to the [System](#) documentation.

Create Button

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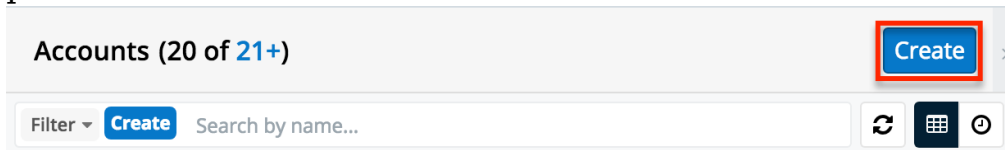
List View Search

To search for a specific record within a module or for a list of module records filtered by name, use the search bar located above any module's list view. Start typing a word into list view search and Sugar will retrieve all records that start with the given characters.
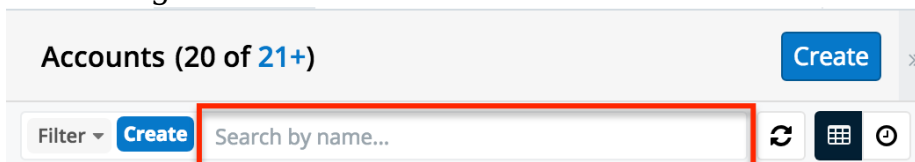
List view searches also support the system wildcard character (%) to retrieve results that contain certain characters in their name or title. For more information about performing module-specific searches via list view, please refer to the [Search](#) documentation.

Refreshing Search Results

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

Checkbox Selection

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

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

If you wish to clear the selection for all records on the list view result set, simply

click "Clear selections" in the dialog. You can also clear the selections for all records by clicking the checkbox option again to remove the checkmarks.
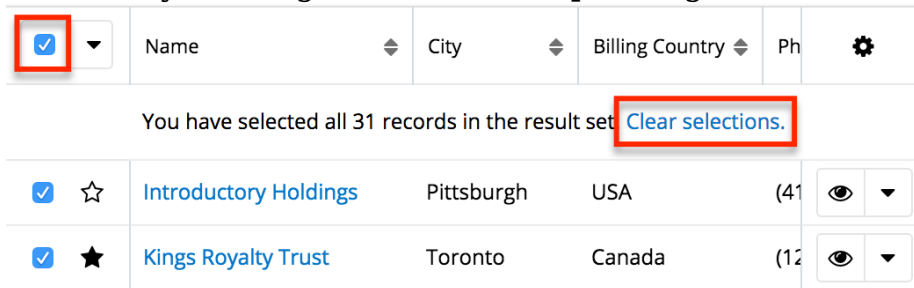
Mass Actions Menu

The Mass Actions menu to the right of the checkbox option allows you to perform various actions on the currently selected records. Please note that the actions available to perform will vary between each of the modules. To access the Mass Actions menu simply click the triangle next to the checkbox option.
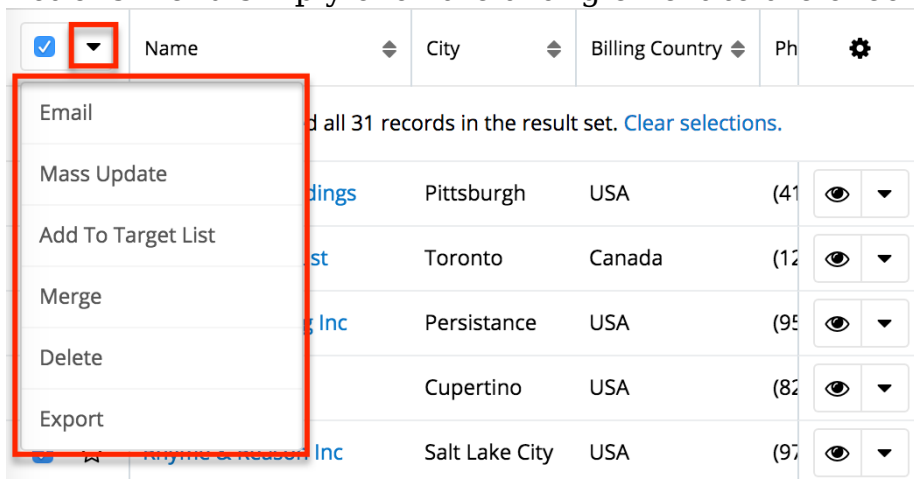
For more information on the actions available within a specific module, please refer to the list view section in the application guide pertaining to that module. The most common actions available in the Mass Actions menu are as follows:

Menu Item	Description
Email	For modules which include an Email field, send an email to one or more records' email addresses
Mass Update	Mass update one or more records at a time
Merge	Merge two or more duplicate records
Recalculate Values	For modules with a calculated field,

	updates calculated values to reflect recent changes to calculated fields made via Admin > Studio
Delete	Delete one or more records at a time
Export	Export one or more records to a CSV file

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

Favorite Designation

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

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

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the List View Search to find the Account records you wish to mark as favorites.
3. Mark the star icon on the left of each desired account's row.
4. To remove the account as a favorite, click the star again to revert it to white.
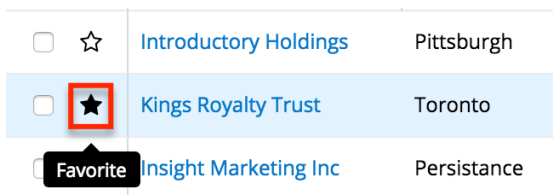
Column Reordering

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

Column Resizing

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

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

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

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

Column Sorting

Sugar's list view provides users the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. You can click the column header again to

reverse the sort order.

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

		Name		Phone		City		Billing Country	
☐	▼		⬍		⬍		▼	⬍	⚙
☐	★	Kings Royalty Trust		(123) 456-1234		Toronto		Canada	👁 ▼

Column Selection

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

		Name		Phone		City		Billing Country	
☐	▼		⬍		⬍		▼	⬍	⚙
☐	★	Kings Royalty Trust		(123) 456-1234		Toronto		✔ **Name**	
☐	☆	JAB Funds Ltd.		(366) 842-4996		St. Petersbu.		✔ **Phone**	
☐	☆	Cloud Cover Trust		(598) 722-5289		St. Petersbu.		✔ **City**	
☐	☆	Nimble Technologies Inc		(182) 329-3369		Santa Fe		✔ **Billing Country**	
☐	☆	Spindle Broadcast Corp.		(510) 946-3705		Santa Fe		✔ **User**	
☐	☆	Aim Capital Inc		(506) 505-8650		Santa Fe		✔ **Email Address**	
☐	☆	24/7 Couriers		(382) 239-7069		San Mateo		✔ **Date Modified**	
☐	☆	Tri-State Medical Corp		(171) 906-5479		San Jose		✔ **Date Created**	

Preview

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

Record Actions Menu

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

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

Menu Item	Description
Edit	Edit this record
Follow	Follow this record
Delete	Delete this record
Convert	For the Leads module, convert this lead

More Records

The list view loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. By default, Sugar displays 20 records per list view results set, but administrators can change the

number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation. To load the next set of list view results, simply click the More "Module Name" (e.g. More accounts) link at the bottom of the list view.

☐	☆	Smith & Sons	(550) 176-4995	Los Angeles	USA	Max Je	👁	▼
☐	☆	XY&Z Funding Inc	(974) 319-4045	Kansas City	USA	Chris (	👁	▼
☐	☆	Chandler Logistics Inc	(575) 569-7545	Kansas City	USA	Jim Bro	👁	▼

More accounts...

🗲 SUGARCRM   📱 Mobile   ⌨ Shortcuts   💬 Feedback   ❓ Help

Activity Stream

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

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

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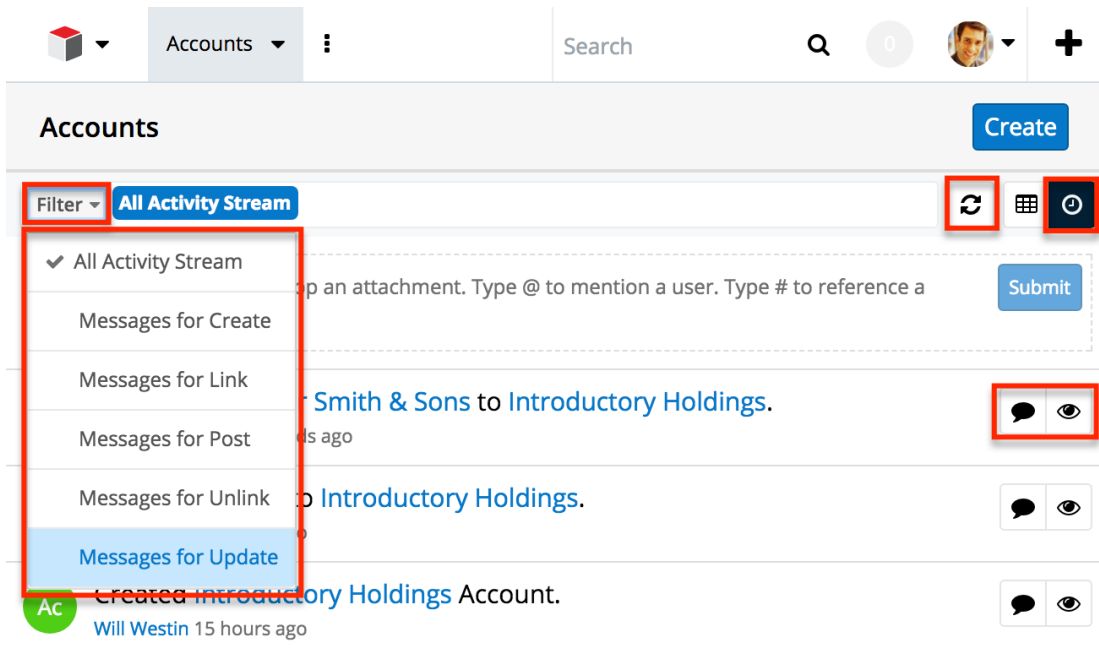
Dashboards

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

Record View

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

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

Favorite Designation

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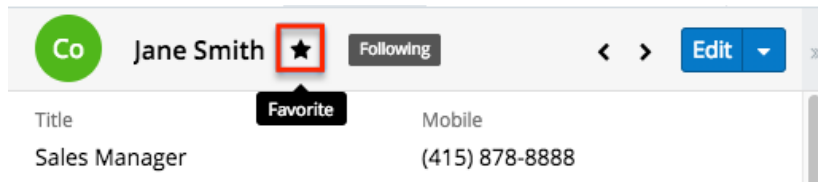
Following Designation

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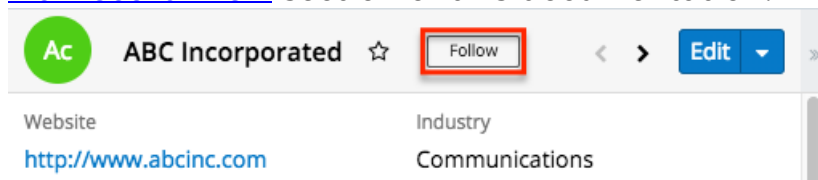
Next or Previous Record

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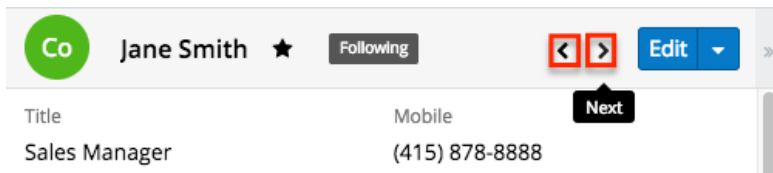
Actions Menu

The Actions menu on the top right of each module's record view allows you to perform various actions (e.g. edit, copy, delete) on the current record.
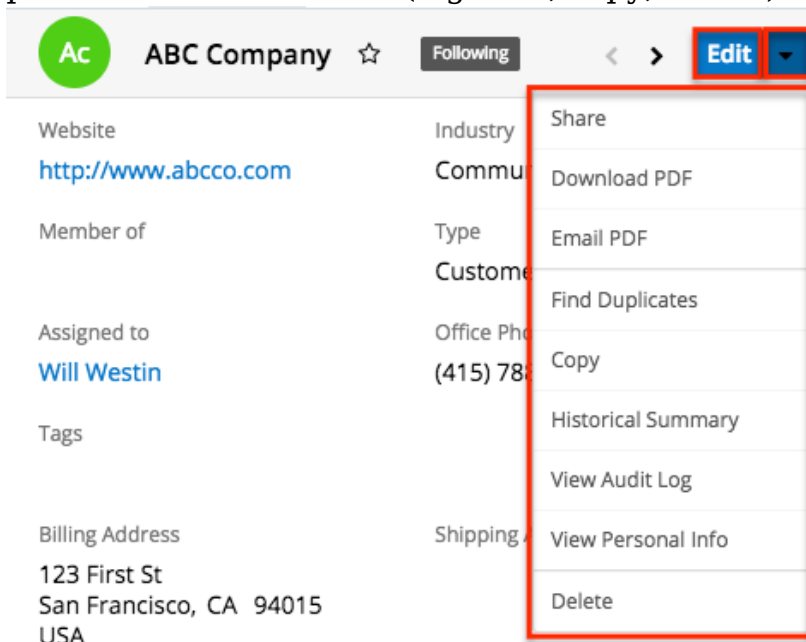
Please note that certain action items (e.g. Convert Lead) in the Actions menu can vary between the various modules. The following sections will cover the most common action items across the modules. For more information on a specific action not listed below, please refer to the record view actions menu section for the specific module's documentation in the application guide.

Menu Item	Description
Edit	Edit this record
Share	Share a link to this record via email
Download PDF	Download record information as a PDF file
Email PDF	Email record information as a PDF attachment
Find Duplicates	Locate potential duplicates of this

	record
Copy	Duplicate this record
Historical Summary	View a historical summary of activities (e.g. calls, meetings related to this record
View Audit Log	View a sequence of changes made to this record
View Personal Info	Display this record's fields which an admin has designated as personal information
Delete	Delete this record

Show More

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

Subpanels

Beneath the module (e.g. Accounts) record's fields are subpanels containing related records from various modules (e.g. Contacts, Leads, Opportunities). You can create a related record as well as link an existing record directly from the

subpanel. Once the records appear within the subpanel, users can [preview](#) the record's detail and edit the record's data directly from the record view. Please note that the subpanels are viewable when you access the Data View section of the module's record view.
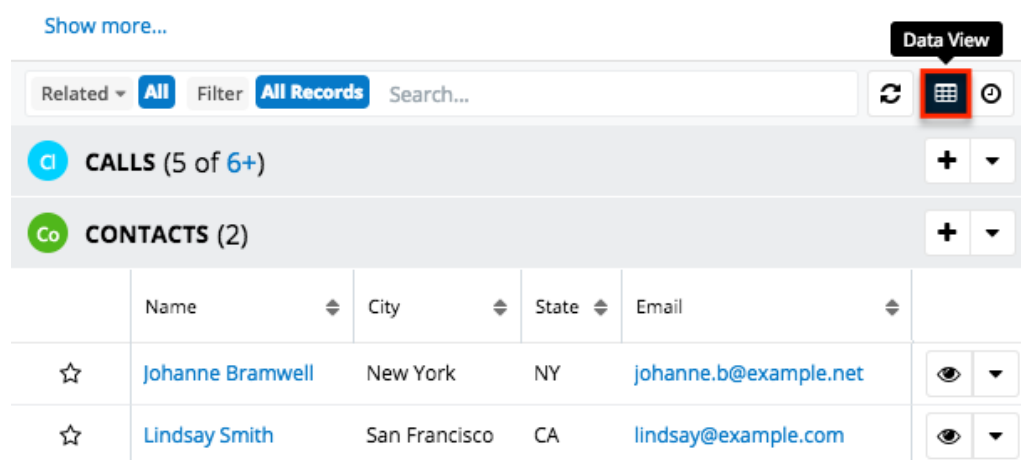
Note: Administrators may choose to disable a module's subpanels for the entire instance via Admin > Display Modules and Subpanels. For more information, please refer to the [Developer Tools](#) documentation.

Related Record Subpanels

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

For example, an account may be related to multiple contacts, so the related contacts are displayed in a subpanel on the account record. Administrators or users with developer-level role access may choose to change a subpanel's title and included fields by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the [Studio](#) documentation.

Related-record subpanels provide the following information and capabilities:

- **Record Count** : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- **Collapse or Expand** : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
  - **Note**: Administrators can choose to disable the sticky feature and collapse all subpanels by default via Admin > System Settings. For more information, please refer to the [System](#) documentation.
- **Column Widths** : Place your cursor on the column divider and, when the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
  - **Note**: Sugar enforces a minimum width for currency fields in list view columns to prevent the columns from being collapsed beyond this limit.
- **Column Sort** : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).
- **Create a New Linked Record** : Click the Plus button on the upper right of a subpanel to relate a new record to the record you are currently viewing. Please note that the Link Existing Record option is not available when the relationship is required in the related module (e.g. in an account's Opportunities subpanel).
  - **Note**: Because creating a new related record opens a drawer on top

of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.

- **Link Existing Record** : Click the triangle to the right of the Plus button then select "Link Existing Record" to relate existing records to the record you are currently viewing.
    - ○ **Note**: Because linking an existing record opens a drawer on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- **Favorites Designation** : Click the star on the left of a record's row to toggle it as a favorite. A dark-gray star indicates that the record is a favorite while a white star indicates it is not. For more information, please refer to the [Favoriting Records](#) section of this page.
- **Hyperlink Fields** : Blue field values, such as record names, may be clicked to open the record in record view. Record view provides a complete picture of the record and is described in detail in the [Record View](#) section of this page. Email addresses also appear in blue and can be clicked to compose an email to that recipient.
- **Record Actions Menu** : Click the triangle on the right of a record's row to access the Record Actions Menu which includes the following options:
    - ○ **Preview** : To preview a record by displaying its fields and activity stream in the right-hand side drawer, click the Eye icon to the far right of the record's row. For more information, please refer to the [Viewing via Preview](#) section of this page.
    - ○ **Edit** : To inline edit the record directly within the subpanel, choose "Edit" from the Actions menu on the right of the record's row and click "Save" to preserve the changes.
    - ○ **Unlink** : To delete the relationship between the two records, choose "Unlink" from the Actions menu on the far right of the record's row. This removes the relationship but does not delete the record itself. Please note that the Unlink option is not available when the relationship is required in the related module (e.g. in an account's Opportunities subpanel).
    - ○ **Additional Options** : Some modules may have additional options available that are covered in the individual module's documentation.
- **More Records** : By default, Sugar displays up to five records in each subpanel though administrators can alter the number via Admin > System Settings as described in the [System](#) documentation. If additional related records exist, click "More <Module Name>..." (e.g. "More Accounts...") at the bottom of the subpanel to load the next set.

Filtering Subpanels

While in Data View, all of the related records will be displayed beneath the

record's fields. Users have the ability to search for records that appear in the subpanels as well as filter the view to only display a specific module (e.g. Leads, Contacts). To locate a record by name, enter the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below.
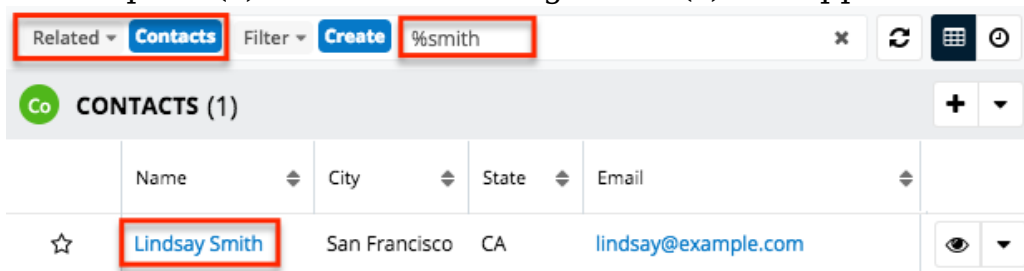
To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. Filter and search may be combined to only display matching records within a selected module. To see all subpanels to which you have access, simply select "All" in the Related options and remove any text from the search bar. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the page. Returning to the page will automatically display the results of your last filter. Please note that search strings entered in the open Search box are not preserved when navigating away.

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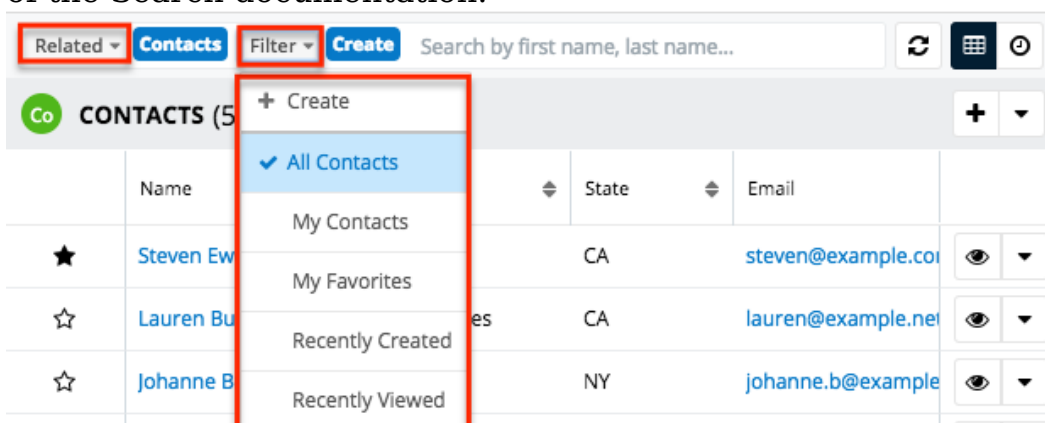
Reordering Subpanels

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

Refreshing Subpanels

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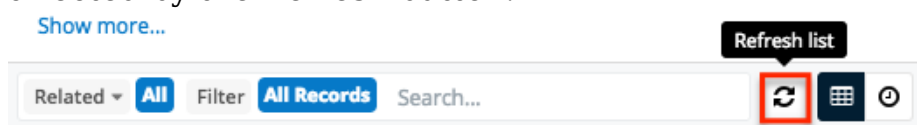
Activity Stream

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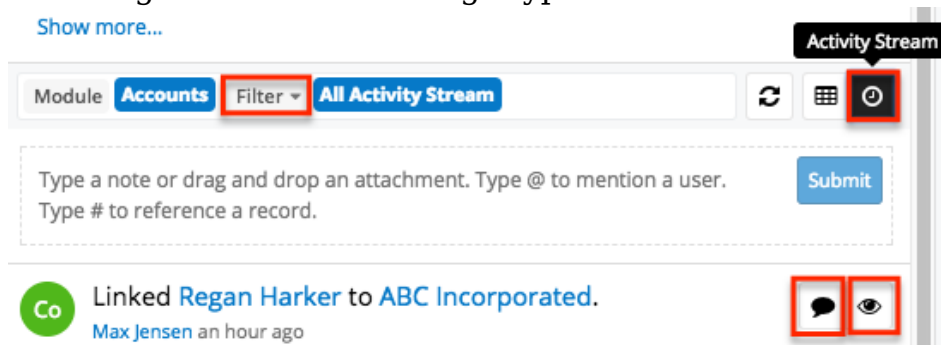
Note: Sugar's activity streams are disabled by default, but administrators can

globally enable the functionality based on their organization's needs. For more information, refer to the [System](#) documentation in the Administration Guide.

Dashboards

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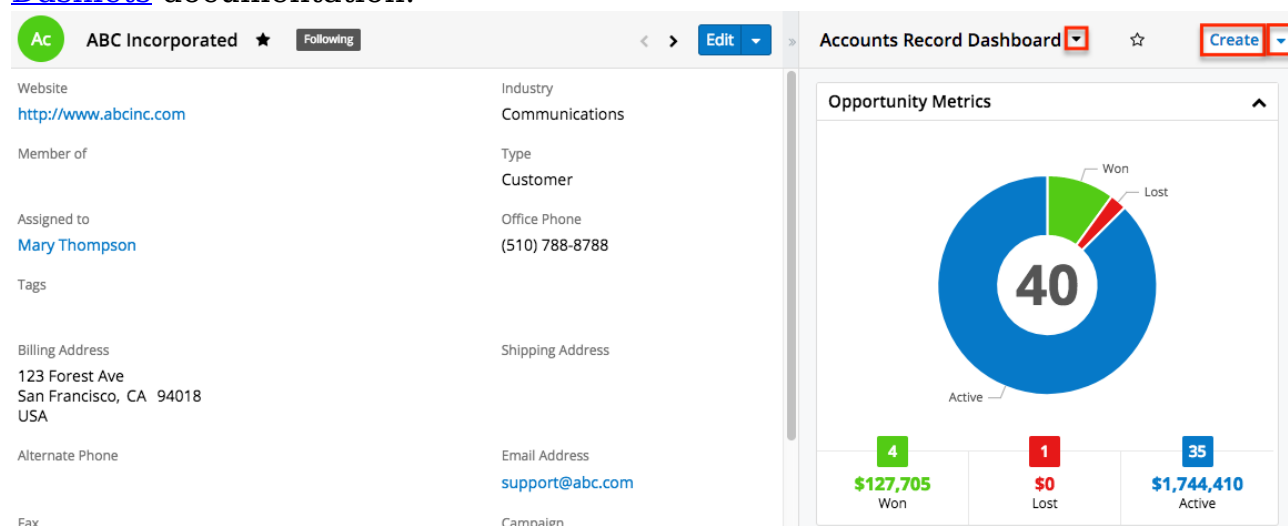
Tile View

For cases, tasks, and opportunities, a unique Tile View is available that displays records in an intuitive drag-and-drop interface. Users can drag a tile from one column to another to change its stage, status, or expected close date depending on the current layout. For information on configuring Tile View layouts, refer to the Tile View Settings documentation in the [Administration Guide](#).
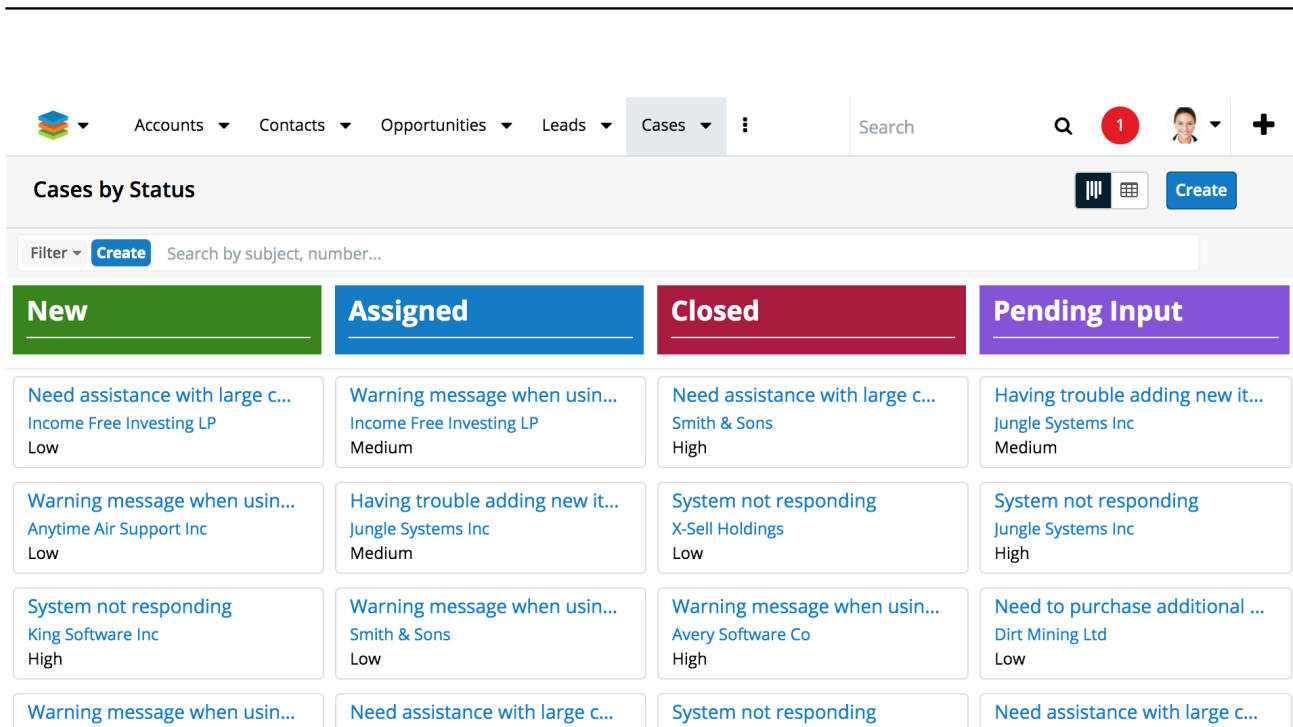
To access Tile View, navigate to the Cases, Tasks, or Opportunities list view and click on the Tile View icon next to the search bar:
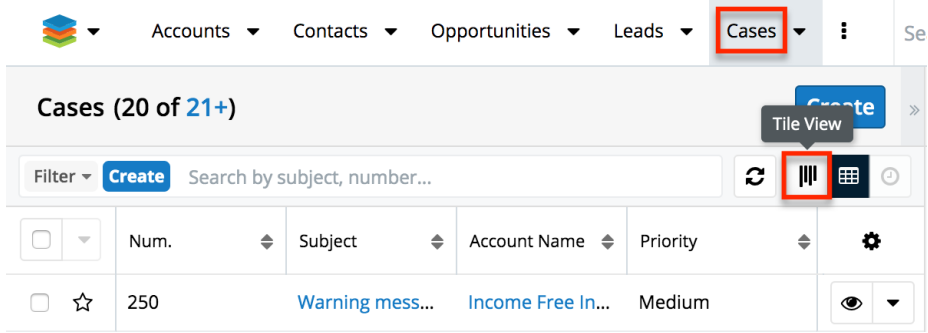
Working With Records in Tile View

In the Tile View, records will be grouped in vertical columns that represent the record stages or the group-by option configured by your administrator. For opportunity records, users can toggle between two group-by options because there is an always-on "Opportunities by Time" option. For more information on using Tile View with opportunities, refer to the [Opportunities](#) documentation.

To further refine the Tile View, users can filter the visible tiles by utilizing the standard Sugar filter options. Simply create or select a stock or saved custom filter (e.g., My Favorites, My Team's High-Value Opps) and the Tile View display will update in real-time. You can also use the search bar to refine the display by a keyword or phrase. For more information on using filters, refer to the [List View Filters](#) section of this page.
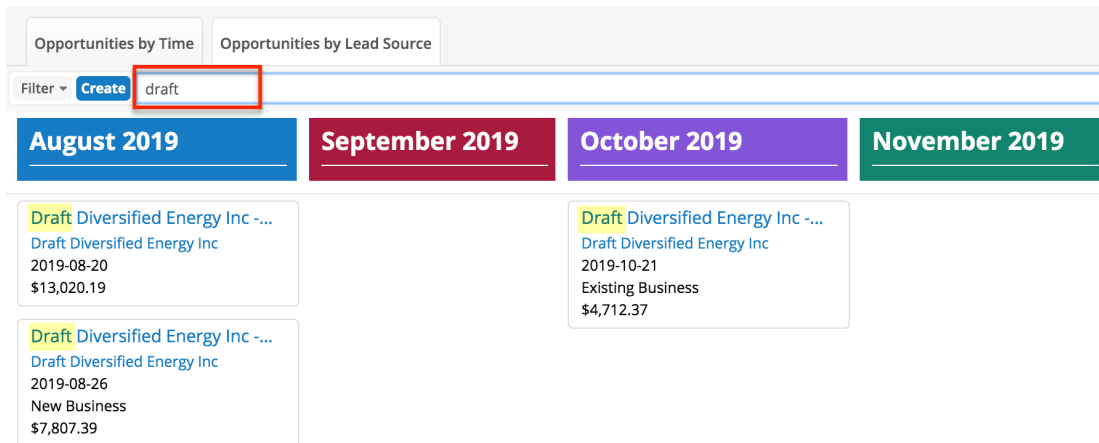
Note: The yellow highlighting in this image has been added for effect and will not appear in the application.

Click and drag a tile from one column to another to change its stage, status, or expected close date depending on the current layout. As an example, the following screenshot illustrates how to change the expected close date of an opportunity from a day in August 2019 to the last day of September 2019. Simply click on the tile and drag it into the appropriate column:
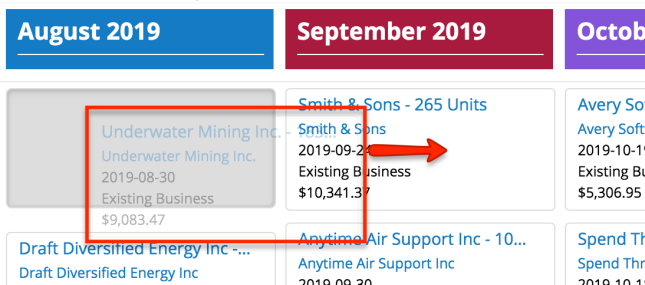
For opportunities with multiple revenue line items, the expected close date will change for all of the related line items. For more information on using Tile View with Revenue Line Items enabled, refer to the [Opportunities](#) documentation.

Intelligence Pane

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

Dashboards

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

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

Previews

Users can preview a record's details by clicking the Preview icon to the far right of a record's row or activity stream post. The preview appears in the intelligence pane to the right of the Home page's activity stream and on list views and record views. The preview displays the topmost fields from the module's record view and the record's most recent activity stream entries. Please note that administrators can configure the fields that appear on the record view layout via Admin > Studio > Layouts > Record View. For more information on activity streams, please refer to the [Activity Streams](#) documentation.

Viewing Previews

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

Previewing From List Views

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

Previewing From Record View

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

Previewing From Activity Streams

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

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

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

Previewing From Global Search

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

Show More

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

Previewing a Record's Activity Stream

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

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

Previewing Next and Previous Records

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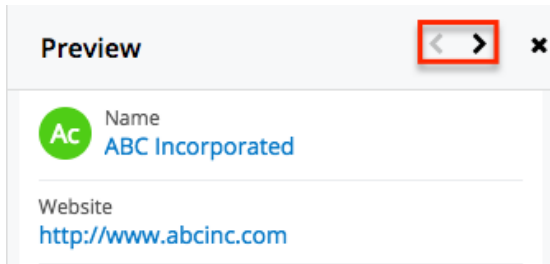
Closing a Preview

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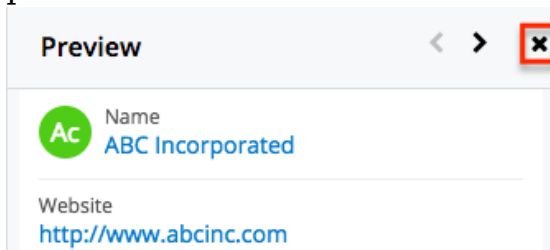
Editing Records

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

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

Editing Inline via Record View

Users can edit individual fields in a [record view](#) without entering the full edit mode by clicking the field name. Fields that support inline editing will display a pencil icon when hovering on the field name or value. After entering your desired values, click "Save" to preserve your changes to one or several fields.

Editing via Record View

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

Editing Inline via Subpanels

Beneath the record's fields are subpanels containing related records from various modules. You can edit individual fields (e.g. Email, Office Phone) for records directly within the subpanel without entering the full edit mode. Simply click the Actions menu to the far right of the record's row and select "Edit".

The fields on the record's row will become editable and allow users to type or select a new value. You can click the double arrow icon on the upper right of the page to expand the subpanel list view's width to make editing easier. Click "Save" to preserve your changes.

Editing Inline via List View

You can also edit individual fields on a module's list view without entering the full

edit mode. Click the Record Actions menu to the far right of the record's row and select "Edit".

The fields on the record's row will become editable and allow users to type or select a new value. You can click the double arrow icon on the upper right of the page to expand the list view's width to make editing easier. Click "Save" to preserve your changes. After saving, please refresh the page to have any list view filters be applied to the new record's values.

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

Editing via List View Preview

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

To edit a record via the list view preview, navigate to a module's list view and click the Preview button to the far right of a record's row in order to open the preview. Hover over the Preview header and then click the pencil icon.
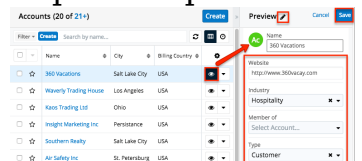
The fields on the record's preview will become editable and allow you to type or select a new value. Click "Save" to preserve your changes.

Mass Editing via List View

Mass Updating allows you to apply the same changes to multiple records at once. Administrator users or users with developer-type role access can control which fields are available during mass update via Admin > Studio. Fields with the data
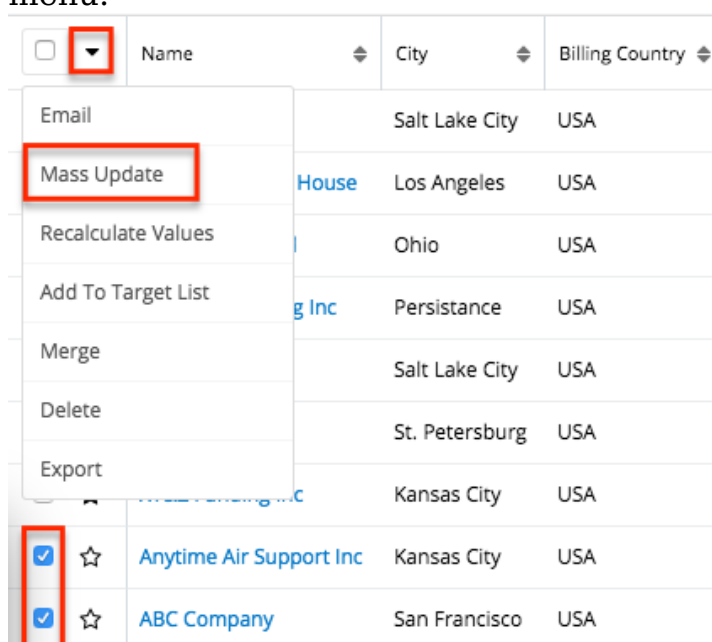
type of date, datetime, dropdown, multiselect, radio, relate, flex relate, or tags can be made available for mass updating. For more information on configuring the mass update fields, please refer to the [Studio](#) documentation. After using [list view search](#) to locate the desired records, you can choose individual records or use the [Select All](#) option to modify all of the current results. Using the Select All option will allow you to update up to 1000 records at a time. If you wish to update more than 1000 records or update a specific group of records from the list view, use filters to perform the updates in smaller batches.

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

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

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the list view's [list view search](#) to identify accounts you wish to modify.
3. Select the desired accounts then choose "Mass Update" from the Actions menu.
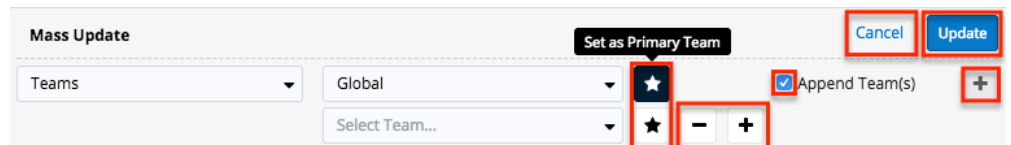
4. The Mass Update panel will appear below the search bar. Set values for the field(s) you wish to alter. The following options may be available in the Mass Update panel:
   - **Add Row/Remove Row** : To mass update several fields at once, click the plus icon to the right of the row.
   - **Append {Field}(s)** : When mass updating a field that may contain multiple values (e.g. Tags, Teams), Sugar will display a checkbox labeled "Append {field}(s)", where {field} is the name of the field you have selected. This option is enabled by default to prevent loss of data by adding the new values to any existing data in the updated field. Disable the checkbox if you prefer to overwrite any existing

data in the updated field.

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

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

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

Deleting Records

If a record is invalid or should no longer appear in your organization's instance, it may be deleted from either the record view or list view. Deleting via the record view allows you to delete the current record while the list view allows for deleting one or more records at a time. Deleting a record will not delete its related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

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

Deleting via Record View

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

1. Navigate to an account's record view.

2. Select "Delete" from the Actions menu.
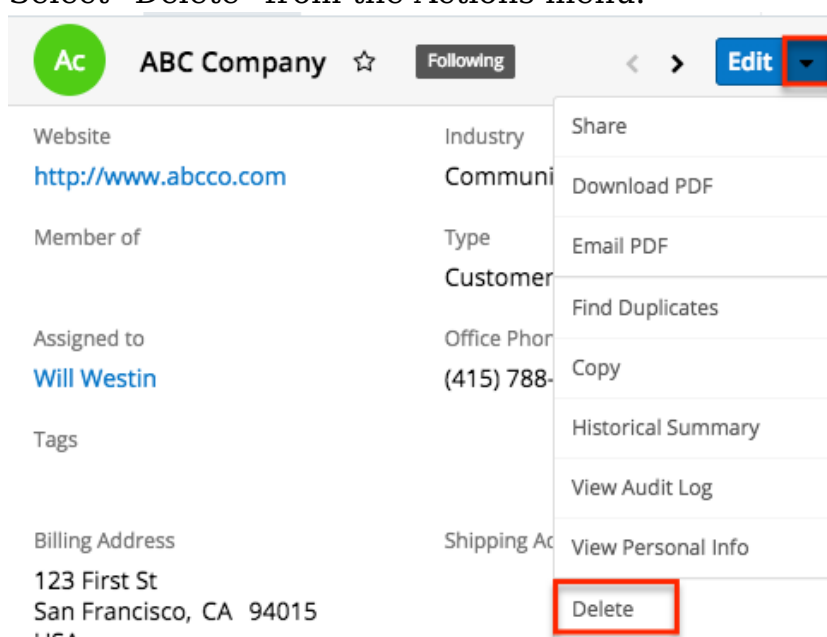
3. A pop-up message will display asking for confirmation. Click "Confirm" to proceed.

Deleting via List View

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

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

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

Mass Deleting via List View

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

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the [List View Search](#) to find the Account records you wish to delete.
3. Select the desired account records then choose "Delete" from the Actions menu.

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

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

Emailing Records

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

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

Once an email is successfully sent by a method other than workflows or campaigns, the email record will appear in the History dashlet and Emails subpanel on the record's record view. For more information on sending emails

from your own account, please refer to the [Emails](#) documentation.

Emailing via List View

For modules that include an Email field, the Email option in the list view's mass actions menu enables users to send an email message to one or more records at a time from the module's list view. Simply select the desired record(s) from the list view then choose "Email" from the list view Actions menu. The Compose Email window will open allowing you to enter all relevant information (e.g. subject, body). Please note that the email will be sent to the selected record's primary email address on file.

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

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Find and select the accounts in the list view that you would like to send an email to.
3. Choose "Email" from the Mass Actions menu.
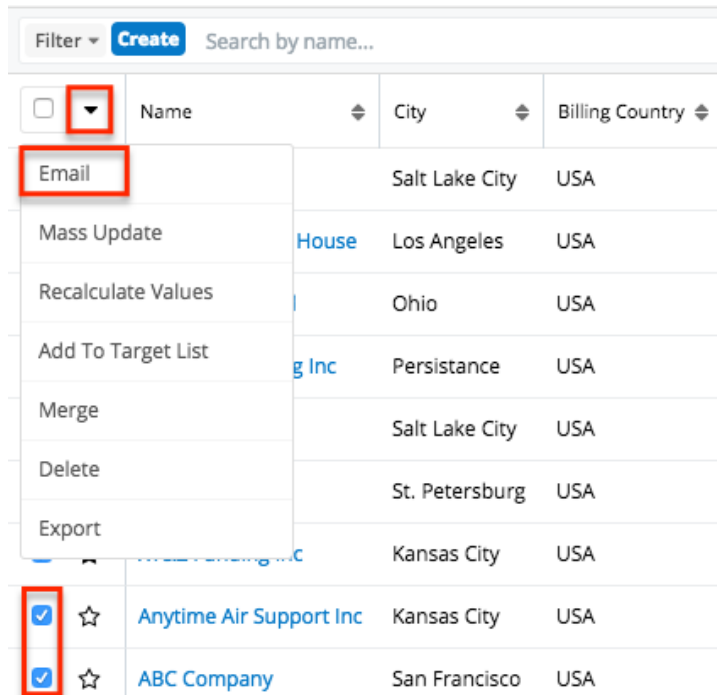
4. In the Compose Email window, enter the subject and body of the email message, edit the recipient fields (optional), then click "Send".

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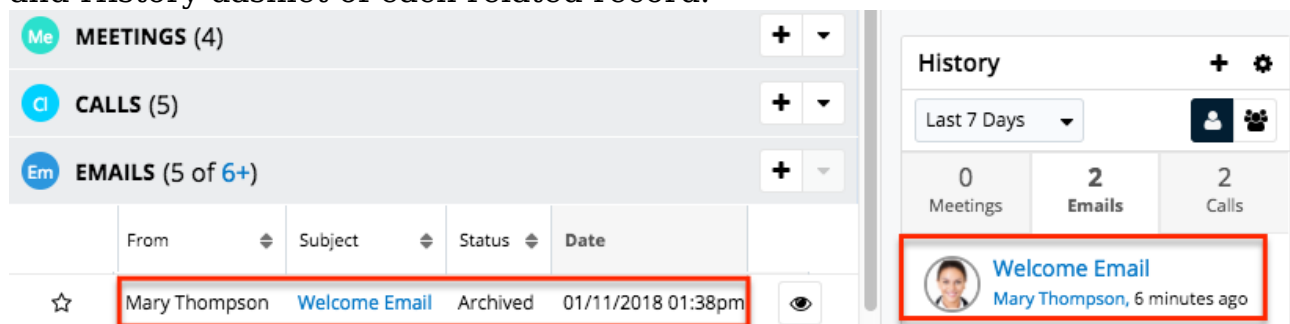
Emailing via Quick Create

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

- **Quick creating via Quick Create menu** : Use "Compose Email" in the Quick Create menu to relate a message to the record you are currently viewing and automatically populate the message's "To" field with the record's name and primary email address. If you use the Compose Email

quick-create option from any other page, simply insert the desired recipient(s) manually as explained in the [Working With Recipient Fields](#) section of the Emails documentation.
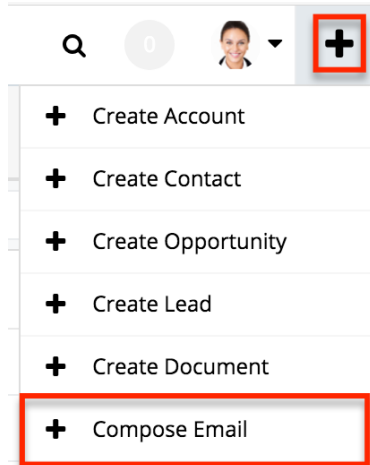
- **Quick creating via email address** : The Quick Create view will also open if you click on a hyperlinked email address inside the Sugar application. For example, email addresses displayed in list views, dashlets, intelligence panes, and record views can be clicked to expose the Quick Create email compose view pre-filled with the clicked email address.
    - Quick create from an email address in list view:
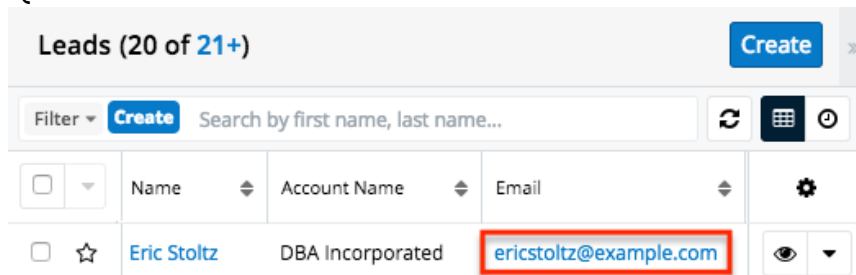
    - Quick create from an email address on the record view:
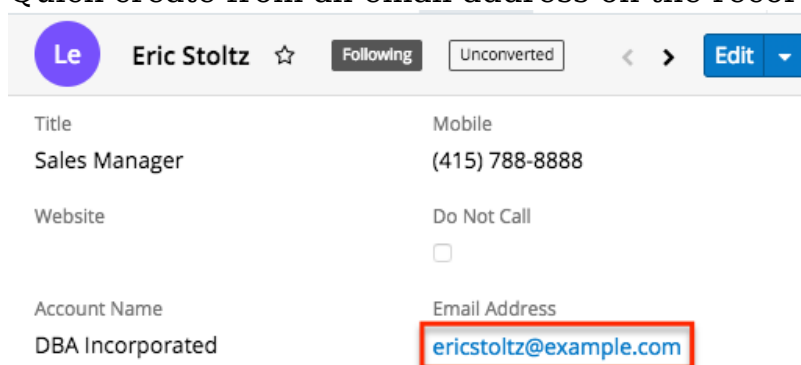
- **Quick creating via Emails subpanel** : Click the Create (+) icon on the Emails subpanel to compose an email to the record's primary email address and automatically relate the message to the record you are viewing.
  Note: Legacy modules contain an Activities subpanel instead of an Emails subpanel.

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

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

Emailing via the Emails Module

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

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

1. Click "Compose Email" on the Emails module list view or the Emails module tab menu:
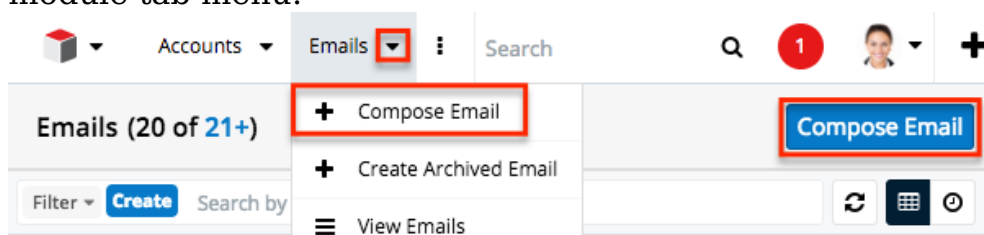
2. Enter appropriate values for the [fields](#) in the layout. All required fields are marked as such and must be completed prior to saving.
3. Once the necessary information is entered, click "Send" to deliver the message to the recipients specified in the To, CC, and BCC fields. Alternatively, click "Save Draft" to navigate away from a message without sending it. Email records in a draft state are only visible to the email's assigned user and the administrator.

For more detailed information about sending email messages, please refer to the [Emails](#) documentation.

Emailing via Workflows

Sugar's Workflows module is available to administrators and users with developer-type role access. With each workflow, a set of conditions triggers a combination of actions and email alerts, including the ability to send emails to Sugar records that include an email address. Workflows can send simple emails or can utilize alert email templates built to include relevant data pulled from the record as well as your organization's design and branding. For more information, please refer to the [Workflow](#) documentation.

Emailing via SugarBPM

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

Exporting Records

Exporting downloads all fields for the selected records to your computer as a .CSV (comma-separated values) file. This may be useful when needing to use Sugar data with other software such as Microsoft Excel or to update existing records by exporting, making changes, then importing the altered records back into Sugar. For more information on updating existing records via import, please refer to the [Import](#) documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of

records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Records may be exported from the module's list view by first locating and selecting the checkboxes of the desired record. Then, select "Export" from the Mass Actions menu. You can also export Rows and Columns-type reports if you wish to employ more complex filter criteria and have greater control over which fields will be included. For more information on exporting records, please refer to the [Export](#) documentation.

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

Using Team-Based Permissions

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

An administrator must first enable team-based permissions and configure roles and users for this feature. For more information, please refer to the [Role Management](#) documentation. Once the roles are applied to users, any user who can edit the Teams field in the enabled module can grant extra access to teams of users.

If you are not an administrator and you are not sure if team-based permissions are

enabled for a module, simply navigate to a record view, click "Edit", and look for a lock button next to the Teams field:

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

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

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

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

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

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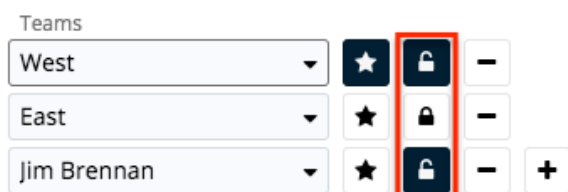
Note: Changes made to the selected state of teams on an existing record are audited in the record's audit log.

Locked Fields

Occasionally, you may see a lock icon (not to be confused with the Lock Button used for team-based permissions) near one or more fields on a record in Sugar. The lock icon indicates that the adjacent field is temporarily locked from editing for all users. Locked fields occur as a result of SugarBPM settings that have been configured by your system's administrator. When a record becomes involved in a process that has locked fields, that record will respect those field locks until the record is no longer participating in the process.
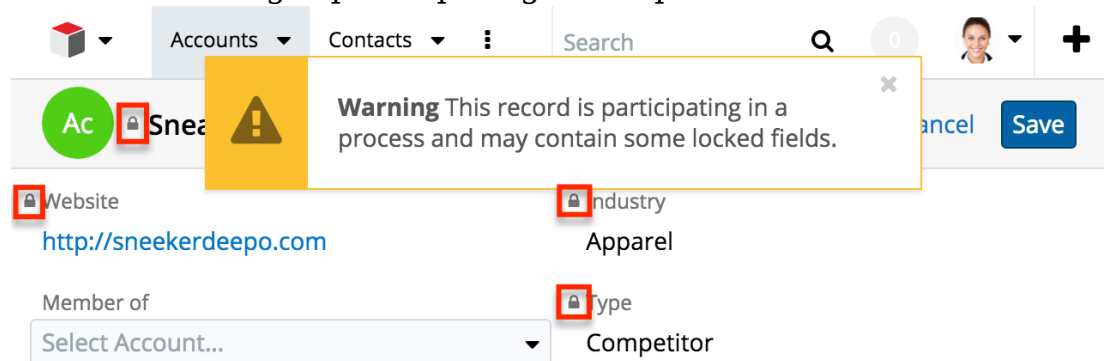
Locked fields are enforced in Sugar for imports, mass updates, and record merging. Please note that records containing one or more locked fields cannot be edited via list view regardless of whether the locked fields appear in the list view's columns. To edit the record's unlocked fields, you must navigate to the record view, which you can do by clicking on the record's link in the alert box or as you typically would in Sugar.

Recalculating Calculated Values

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

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

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

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

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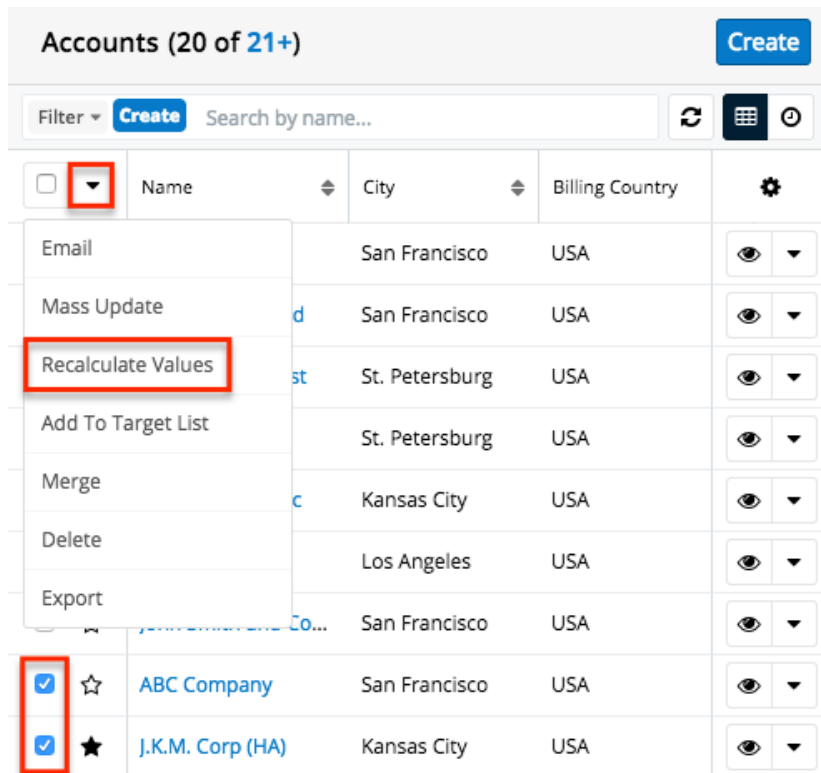
Finding Duplicate Records

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

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

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

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

1. Navigate to an account's record view.
2. Choose "Find Duplicates" from the Actions menu.
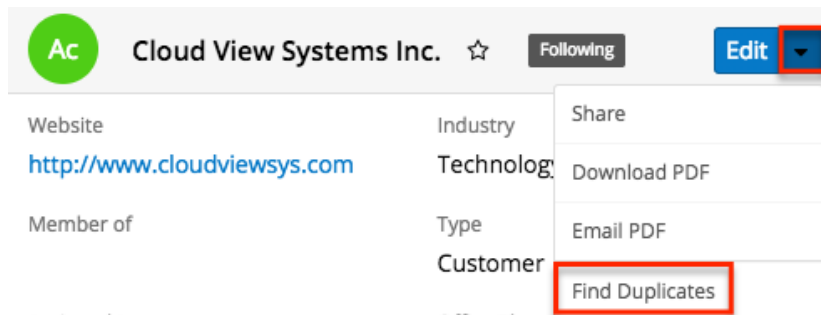
3. Potential duplicate account records will be listed on the Find Duplicates page. Select the duplicate record(s) you wish to merge then click "Merge Duplicates".
   - You can preview the duplicate record's details by clicking the Preview button to the far right of the record's row.
   - You can search for specific records from the Accounts list view if you wish to check for more potential duplicates. For more information on performing a search, please refer to the List View Search section of this documentation.
   - You can also click the Gear icon above the Preview button to change the list of fields that display on the list view column headers.
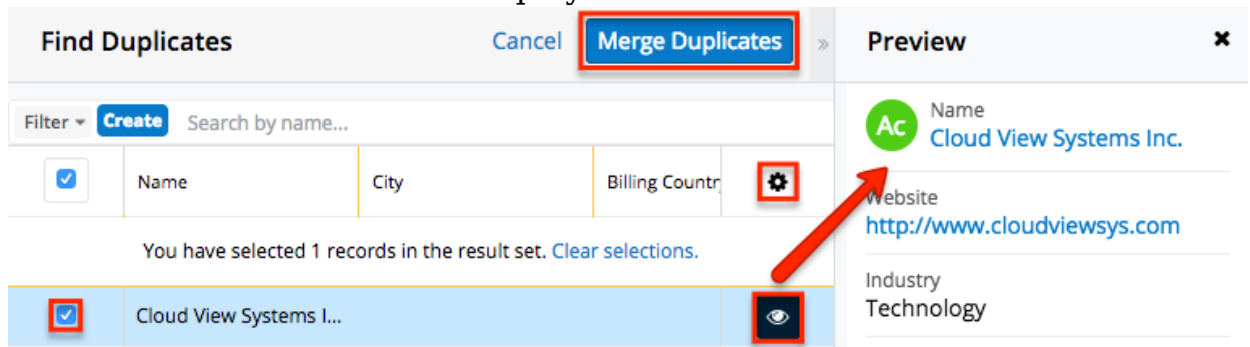
Once you click "Merge Duplicates", the merging process with the current record will begin. For instructions on performing the merge that follows, please refer to Steps 3-9 of the Merging via List View section of this documentation.

Merging Records

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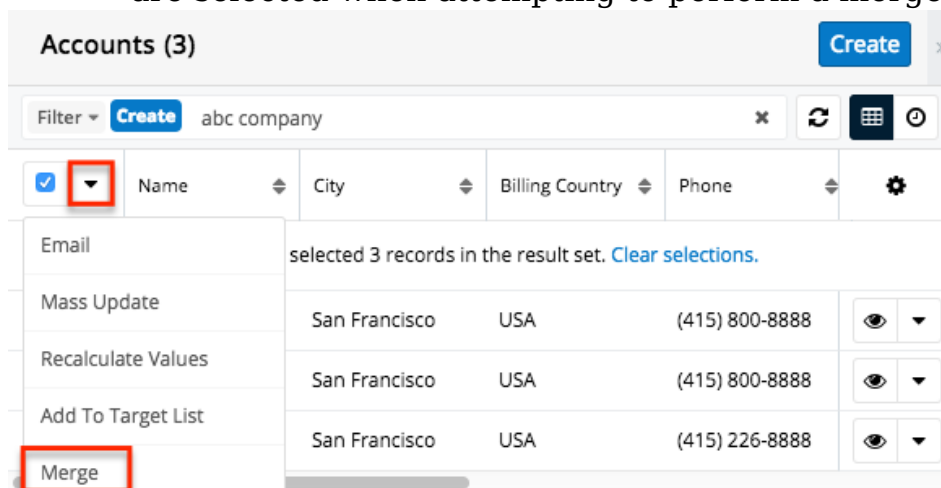
Merging via List View

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

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

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

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

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

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

Viewing Record Historical Summaries

For modules that are related to activity records (e.g. calls, meetings, emails, notes, and tasks), you can view quick details of the related activities via a record's Historical Summary option. From the record view, simply select "Historical Summary" in the Actions menu.
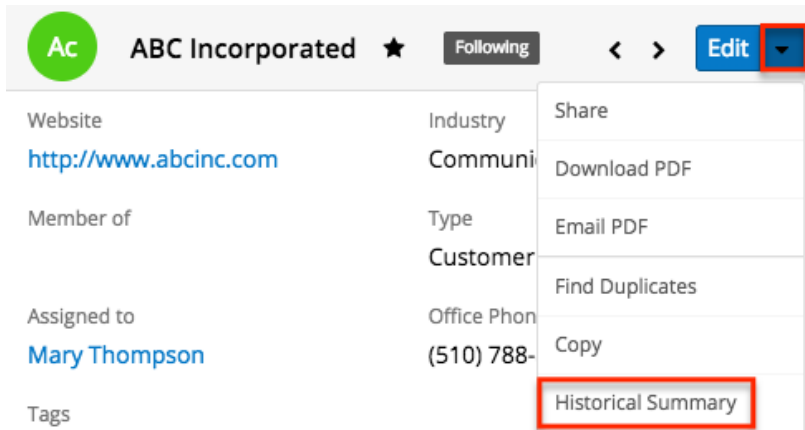
The Historical Summary shows a digest of the following activity records that are considered closed by virtue of their statuses:

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

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

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

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

Users can also easily adjust the size of columns in the Historical Summary list view

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

Viewing Record Audit Logs

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

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

The audit log contains the following fields:

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

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

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

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

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

Viewing Email Address Audit Logs

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

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

Viewing Personal Information

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

Record PDFs

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

available for the module.

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

Downloading Record PDFs

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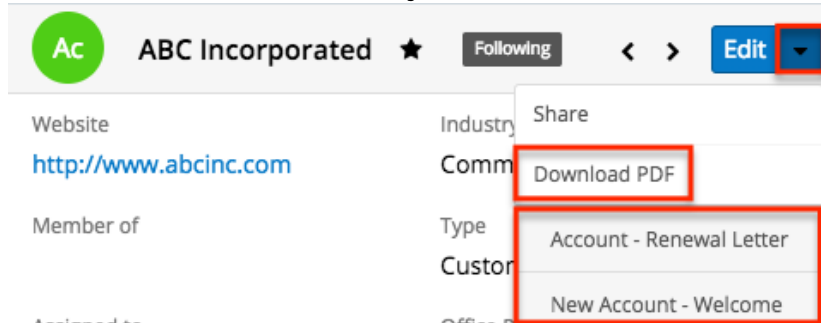
Emailing Record PDFs

Users also have the option to email record information as a PDF file using Sugar's email client. From the originating record's record view, click the Actions menu and select "Email PDF". All of the PDF templates that your administrator has created and made available for the module will appear beneath the Email PDF option in the Actions menu.
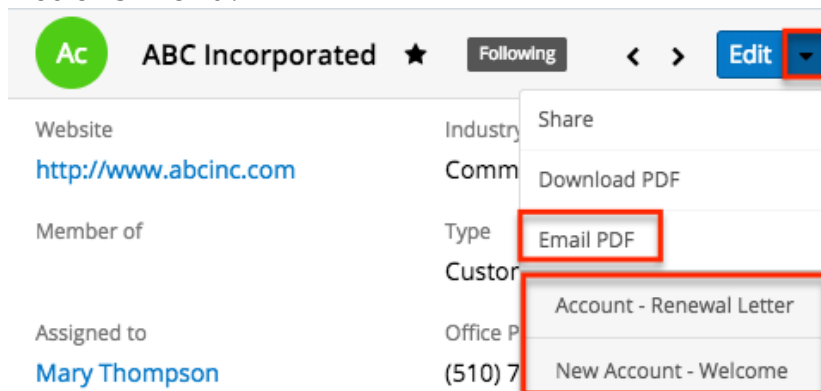
Select one of the templates to create a draft in the Emails module. Sugar will deliver you to the record view for the email.
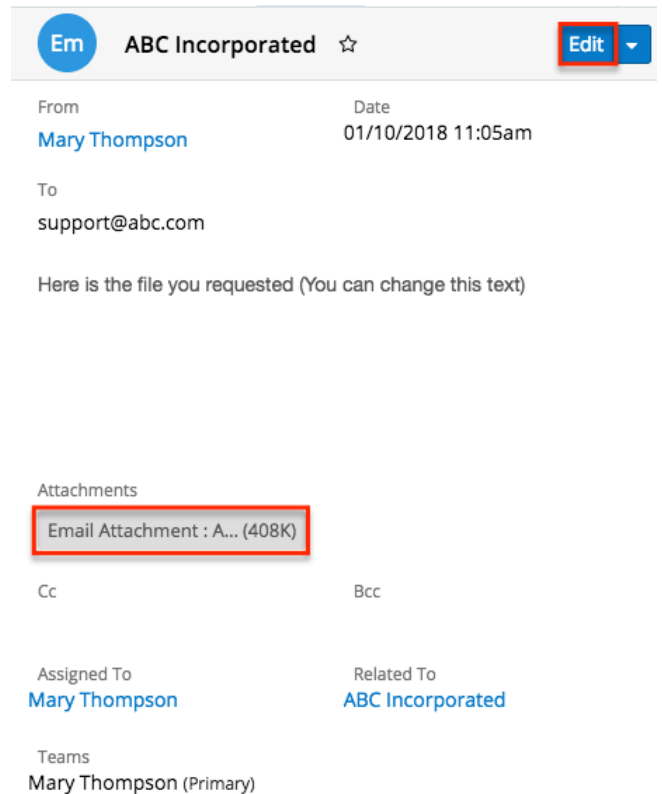
The draft will have the following information pre-populated:

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

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

Favoriting Records

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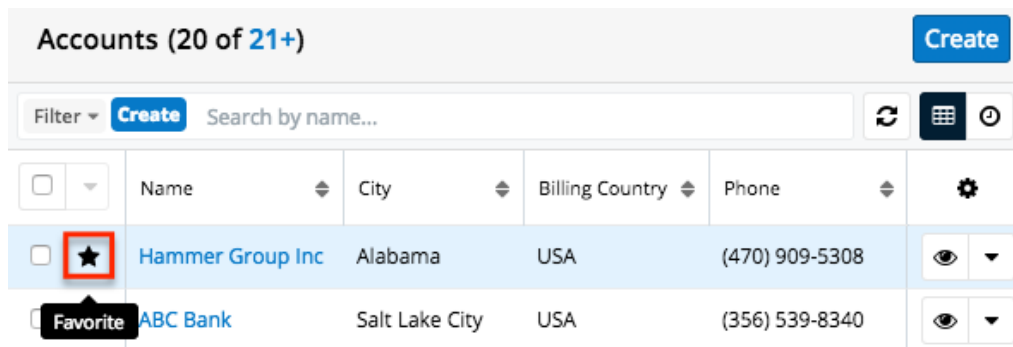
[search](#) or from the [module tab](#). Once records are marked as favorites, select "My Favorites" from the Filter option next to the Search bar or select from your most recent favorites directly from the module tab.

Favoriting via List View

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

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

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

Favoriting via Record View

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

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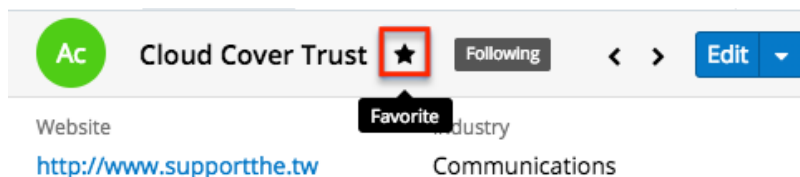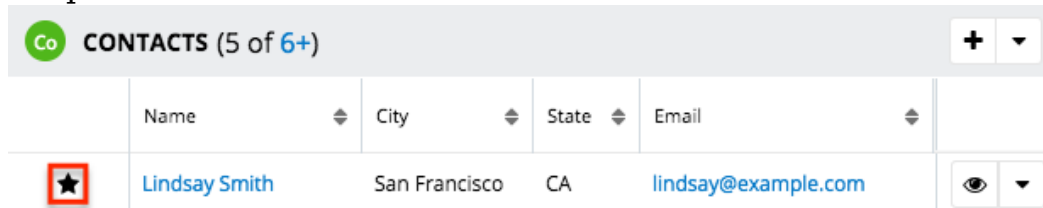
Favoriting via Subpanel

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

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

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

Following Records

Users can also choose to follow individual records. This allows each user to personalize their activity stream by specifying which records' posts should appear on the activity streams displayed on their Home page and in module list views. Please note that you will automatically follow the records that you create as well as records that are assigned to you. You will not, however, automatically follow records you import. Should a user lose access to a record in Sugar, they will automatically stop following that record. For more information about activity streams, please refer to the [Activity Streams](#) documentation.

Following via List View

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

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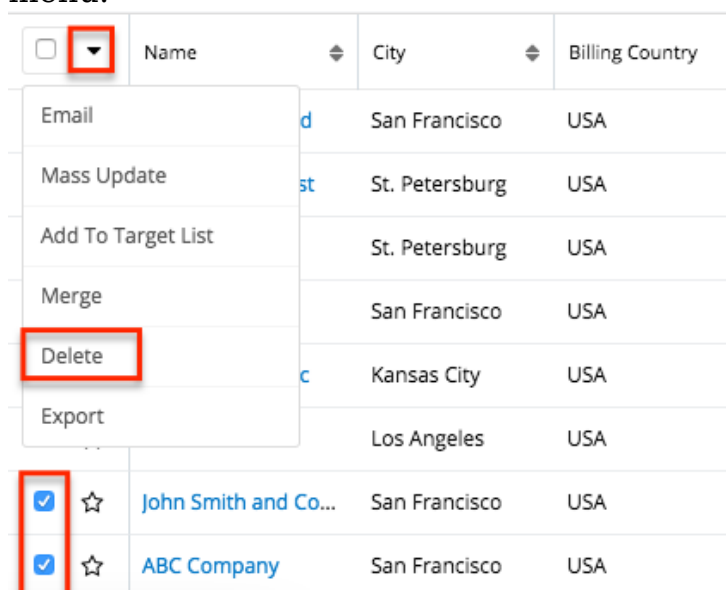3. Click the Record Actions menu to the far right of the records row and select "Follow".

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

Following via Record View

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

1. Navigate to an account's record view.
2. Click on the Follow button to the right of the account's name to change its label to "Following".
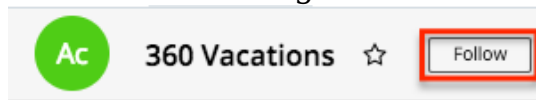
3. To unfollow the account, click on the Following button to revert its label to "Follow".
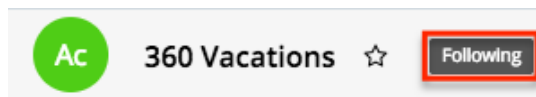
Sharing Records

Individual records can be shared with other users in your organization by sending an email including the record's direct link. In the desired record's record view, select "Share" from the Actions menu. A Compose Email window will open, and the email's text will include the URL of the record. Enter the recipient(s) email address in the To field then click "Send".
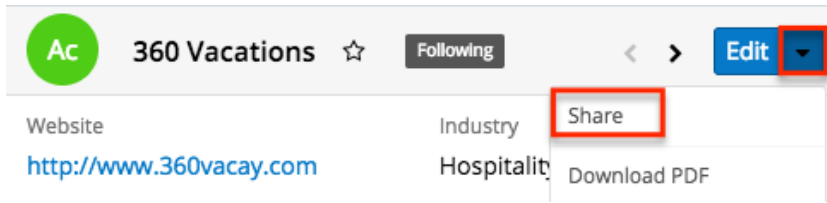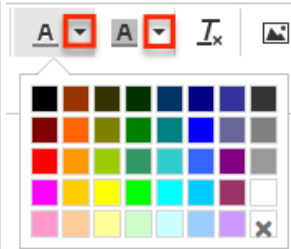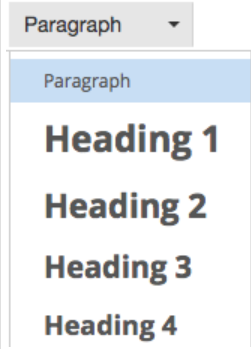
The recipient can simply click the link in the email to access the account record in Sugar. Please note that the user must be logged in to Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation.

Using the TinyMCE Text Editor

TinyMCE is a third-party WYSIWYG editing tool used by Sugar so that users can create content such as knowledge base articles and email messages with rich-text formatting elements.

TinyMCE's rich-text editor framework presents the following familiar formatting options:

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

Clear Formatting	I_x	Clear any formatting.
Insert/Edit Image, Insert/Edit Link		Insert or edit an image or a link.
Font Sizes	Font Sizes 8pt 10pt 12pt 14pt 18pt	Choose a font size for the text.
Paragraph	Paragraph Paragraph **Heading 1** **Heading 2** **Heading 3** **Heading 4**	Choose a format for headers.

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User Interface (Legacy Modules)

Overview

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

options to perform specific tasks.

Legacy Modules

This documentation will cover the Legacy user interface which is carried over from Sugar 6. Below is a list of modules which use the Legacy user interface. Other modules use the updated Sidecar user interface which is described in detail in the User Interface documentation.

- Calendar
- Campaigns
  Note: The Campaigns module is not available for Sugar Serve users. For more information on license types and the functionality available for each type, refer to the User Management documentation.
- Documents

Note: Custom modules that are created in Module Builder will utilize the Sidecar user interface. Custom modules installed to an instance prior to Sugar 7 that were not created in Module Builder will use the Legacy user interface upon upgrade to 7.x.

List View

Each module in Sugar contains a list view to search and display records in a table format. To access a module's list view, simply click the module tab (e.g. Documents) in the navigation bar at the top of Sugar.

The list view displays all records meeting the current search criteria and to which your user has access. By default, Sugar sorts records in descending order of their creation date. You can view the basic details of each record within the field columns or select the record name to view it in the detail view.
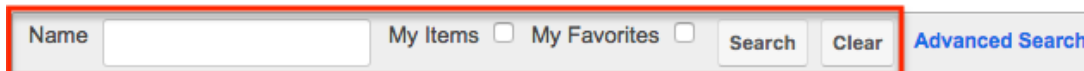
Please note that you will only be able to see records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation.

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

Basic Search

The basic search is at the top of the list view for each module and offers a few, commonly used fields for a simplified search experience.

Search Campaigns

| Name | | My Items ☐ My Favorites ☐ | Search | Clear | **Advanced Search** |

From the Basic Search panel, you can also click "Advanced Search" to access additional search functionality as needed.

The following buttons and checkboxes are common across many Legacy modules' Basic Search panel and have the following functions:

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

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

[Management](#) and [Role Management](#) documentation.

Administrators can configure the fields that appear on the Basic Search for each module via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation.

Advanced Search

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

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

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

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter in a field to search, Sugar will only return records matching that field that you have marked as favorites. When searching by a multi-select or

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

Administrators can configure the fields that appear on the Advanced Search for each module via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation.

Selecting Records

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

To select or deselect records in the Legacy modules list view, use the following methods:

- **Individual Selection** : Mark the checkbox on the left of each record's row on the list view you wish to select.
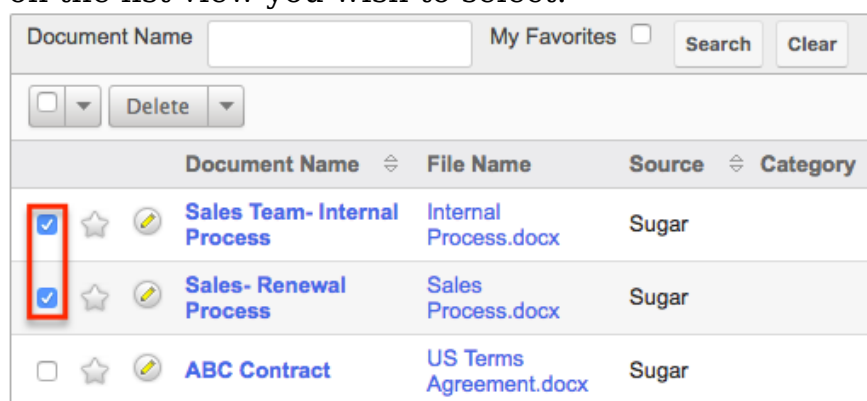
- **Checkbox Selection** : To select or deselect multiple records from the list view, use the options in this checkbox dropdown menu.
    - **Select This Page** : Selects all records shown on the current page of list view results. You can also click the open checkbox to the left of the Checkbox Selection menu to select all records on the current page.
    - **Select All** : Selects all records in the current search results across all pages of list view results.
        - **Note**: When using "Select All" you can not deselect single records, but will have to use the Deselect All option.

○ **Deselect All** : Deselects all records that are currently selected.
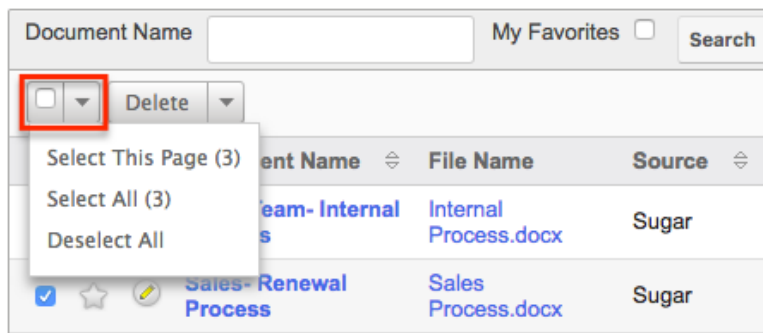
When selecting records, you can page through all of the records and Sugar will remember which records are selected. Depending on your Sugar settings you may see the count of records being selected or you may see a plus sign (+) to refer to more records. Simply select the Deselect All option to remove all selected records regardless of how they were initially selected.

Mass Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records. It allows you to perform actions such as Delete, Mass Update, and Export for one or more records. Please note that not all Legacy modules have these actions available. The sections below will cover the most common actions across the modules. For more information on actions available within a specific module, please refer to the list view section in the application guide pertaining to the specific module.
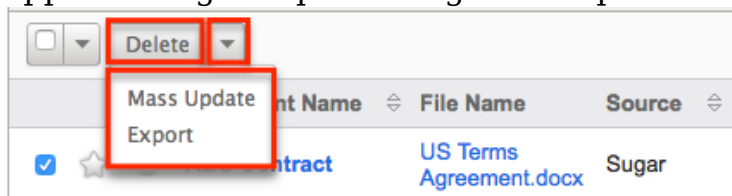
Delete

The list view in Sugar allows you to easily mass delete records. Please note that deleted records are not permanently removed from the database, but are marked as deleted in the system so that it no longer appears in Sugar. These records can be recovered by anyone with direct database access. Also, deleting records in Sugar will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

The following steps cover deleting document records via the Documents list view as an example:

1. Navigate to the Documents list view by clicking on the Documents module tab.
2. Use the Basic or Advanced Search to find the document records you wish to delete.
3. Select the desired document record(s) individually or use the checkbox dropdown's options.
4. Choose "Delete" from the Actions menu.
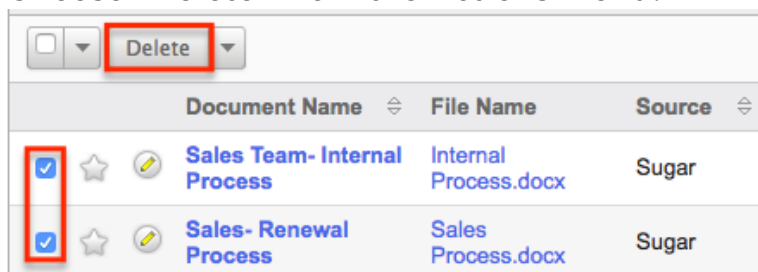
5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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

Mass Update

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

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

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

1. Navigate to the list view by clicking the module tab in the navigation bar.
2. Use the list view's Basic or Advanced Search to identify records you wish to modify.
3. Select the desired records individually or using the checkbox dropdown's

options.

4. Choose "Mass Update" from the Actions menu.

5. Scroll to the Mass Update panel and set values for the fields you wish to alter.

   Note: For the Teams field, use "Replace" to remove existing team assignments before adding those specified here. Use "Add" to add the teams specified here to any existing team assignments.

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

Favorite Designation

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

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

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

Edit Option

Records may be edited at any time to update or add information to the record. You can make changes to existing records by clicking the Pencil icon to the left of each record's name or subject in the list view. This will open up the records edit view layout to update the necessary fields and you can click "Save" to preserve the changes made.

Use the following steps to quick edit records via the list view:

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

4. Update the necessary fields on the record's edit view layout, then click "Save" to preserve the changes.

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

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

Column Sorting

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

Pagination

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

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

More Information

Additional details for each record can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional

information in addition to what appears in the display column fields. The resulting pop-up window will show information such as Description, etc. by default. The list of fields appearing here may only be configured through a code-level customization.

Detail View

The module's detail view displays thorough information including all fields which are grouped by default into the Overview and Other panels. You can also view a record's related records (Activities, Documents, Contacts, etc.), which appear in subpanels beneath the records fields.

Please note that you will only be able to view a record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation.To access a record's detail view, simply click on the name or subject link from anywhere in the application including from the module's list view.

Next or Previous Record

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

Actions Menu

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

actions (e.g. Edit, Share, Copy, Delete, etc.) on the current record. Please note that the action items available in the Actions menu will vary between each Legacy module.

Sales Team: Renewal Process ⭐
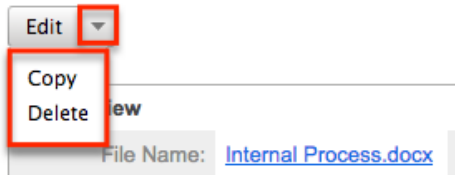
Administrator users can also change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the [System](#) documentation. The following sections will cover the most common action items available across the Legacy modules. For more information on action items not listed here, please refer to the Detail View > Actions Menu section of the specific module's documentation.

Sales Team: Renewal Process ⭐
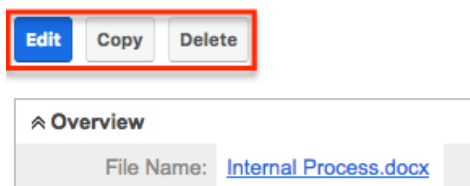
Edit

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

Sales Team: Renewal Process ⭐
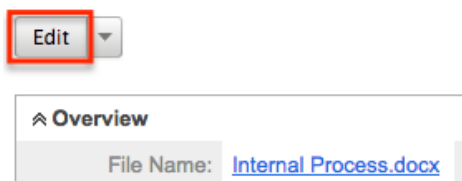
Please note that your ability to edit records in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#)

documentation. Check with your system administrator if you do not see the Edit options.

Administrators in Sugar may configure the module's edit view via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation.

Share

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

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

Copy

You can create a new record by duplicating an existing record from the detail view. The Copy option is useful if the record you are creating has similar information to an existing record. Please note that any related record(s) to the original record will not be copied to the newly created record.
Use the following steps to create a record by duplicating an existing record:

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

December 2017 Holiday Special ☆
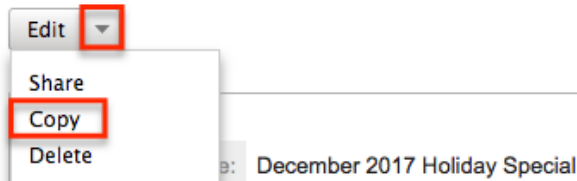
3. The displayed edit view is pre-populated with the original records values. Update the necessary fields, then click "Save".
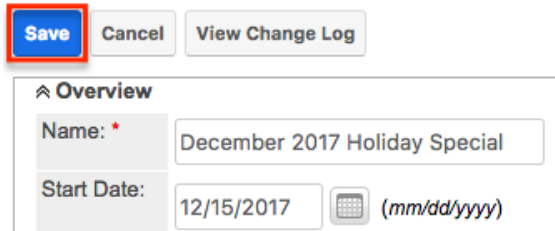
Delete

Users have the ability to delete records that are invalid or should no longer appear in their organization's Sugar instance via the module's detail view. Deleting via the detail view allows you to delete a single record in the module. Please note that deleting records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

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

The following steps cover deleting a document record from the Documents detail view as an example:

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

Sales Team: Renewal Process ☆
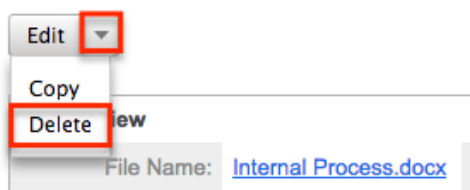
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

View Audit Log

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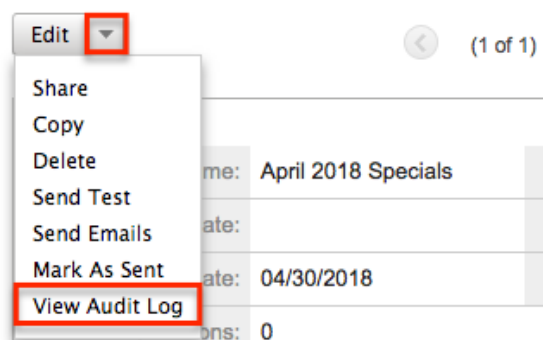
Field Panels

Field panels are what hold the fields for a record in the detail view. Most modules come with two panels defined by default: Overview and Other. Please note that the field panels can be collapsed to hide unnecessary data.

Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels inside the field panels as well as move, create, and edit existing field panels via Admin > Studio to provide visibility to the most important fields. Field panels can also be collapsed by default via Admin > Studio. For more information on modifying field panels, please refer to the Studio documentation.

Subpanels

Beneath the module record's fields are subpanels containing related records from various modules (e.g. Accounts, Contacts). The subpanels that appear in a record's detail view is based on the relationships defined for the current module as well as the administrative settings on which subpanels are set to display in Sugar. You can expand and collapse subpanels as well as rearrange them per your viewing preference. For more information on changing the display of subpanels, please refer to the Layout section of this documentation. You can create related records as well as relate an existing record directly from the subpanel. Please note that the actions available in the Actions menu can vary between certain subpanels.

Users with administrator or developer access have the ability to change the fields (e.g. Status, Subject) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the Studio documentation.

Activities and History

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

Subpanel	Module	Status Field Filter
Activities	Meetings	Does not Equal "Held"
		Does not Equal "Not Held"
	Tasks	Does not Equal "Completed"
		Does not Equal "Deferred"
	Calls	Does not Equal "Held"
		Does not Equal "Not Held"
History	Meetings	Equals "Held"
		Equals "Not Held"
	Tasks	Equals "Completed"
		Equals "Deferred"
	Calls	Equals "Held"
		Equals "Not Held"
	Emails	N/A
	Notes	N/A

Since the Activities and History subpanels contain records from many different modules, there are some differences in the actions and record display than in normal subpanels. Each record in both subpanels will have an icon to the far left indicating which module the record originates from. For example, if the record is a call, then the Telephone icon will display to the left of the subject.

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

You have the following actions available from the Activities subpanel:

- **Create Task** : Creates a new task record related to the record currently being viewed.
- **Schedule Meeting** : Creates a new meeting record related to the record currently being viewed.
- **Log Call** : Creates a new call record related to the record currently being viewed.
- **Compose Email** : Launches the Compose Email popup window to send an email.
  Note: The email will automatically be related to the current record you are viewing.

Note: When creating a Task, Meeting, or Call from the Activities subpanel, you have the ability to set the Status field to "Held" or "Completed" which will place it in the History subpanel.

You have the following actions available from the History subpanel:

- **Create Note or Attachment** : Creates a new note record related to the record currently being viewed.
- **Archive Email** : Allows a received email to be entered manually on a record for historical purposes only.
  Note: This will not send an email to you or the email address on the record.
- **View Summary** : Opens a popup window with the Subject, Status, and Detail of all associated records in the History subpanel. This is useful as it allows you to view a history of all activities that have taken place for the current record.
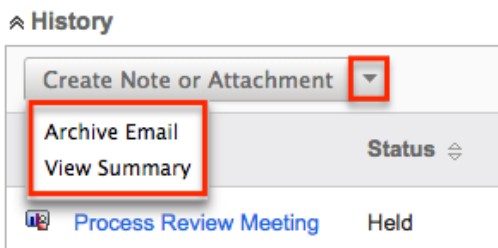
Layout

Subpanels in Sugar can be personalized by each user to only display the most relevant subpanels per their viewing preference.

- **Collapse/Expand** : Click the double arrow to the left of the subpanel's name to either collapse or expand the subpanel.
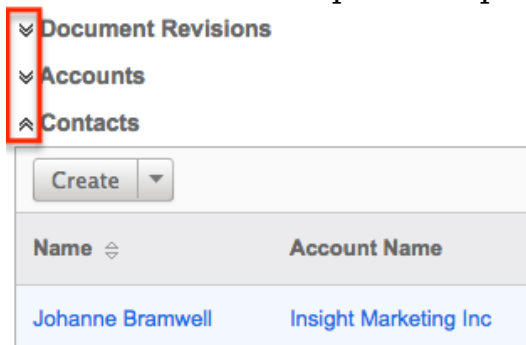
- **Rearrange Subpanels** : Drag and drop the subpanel's header bar to move the subpanel to a new location on the detail view.
  Note: Administrators can prevent users from moving subpanels to different locations on the detail view. For more information on preventing rearranging of subpanels, please refer to the [System](#) documentation. Check with your system administrator if you are not able to rearrange your subpanels.

Actions

Related record subpanels (e.g. Contacts) also provide options to create or select related records directly from the detail view.

- **Create** : Choose "Create" from the subpanel's Actions menu to relate a new record. The newly created record will automatically be related to the current record you are viewing.

- **Select** : Choose "Select" from the subpanel's Actions menu to relate an existing record. The Search popup window will display allowing you to select records to relate to the current record you are viewing.

  Note: You may select multiple records in the search popup to be related to the main record.
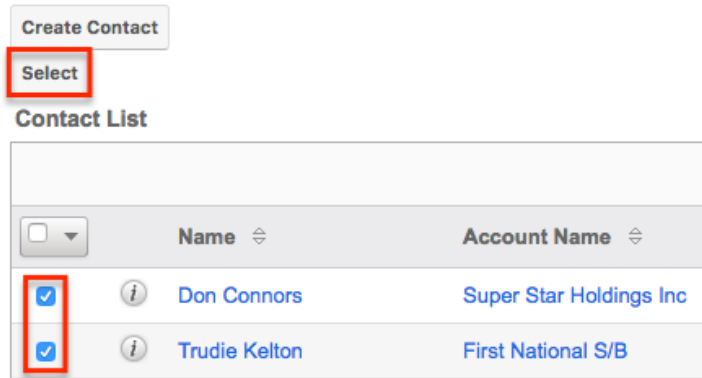
- **Edit** : Choose "Edit" on the far right of the record's row to edit the related record in the subpanel. Make the necessary changes to the record then click "Save" to preserve the changes.
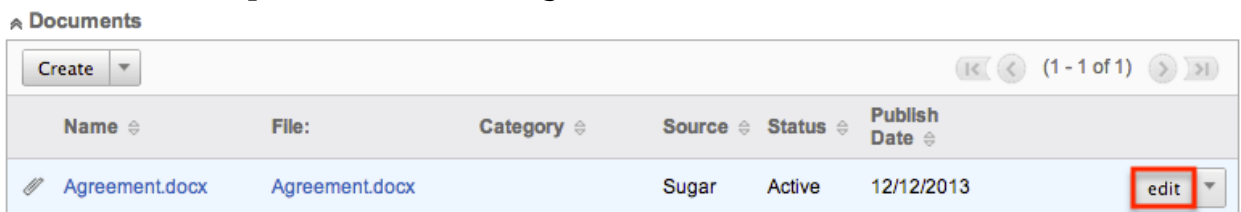
- **Unlink** : Choose "Unlink" from the dropdown on the far right of the record's row to remove the relationship between the related record and current record.
    - **Note**: This removes the relationship, but does not delete the record itself.
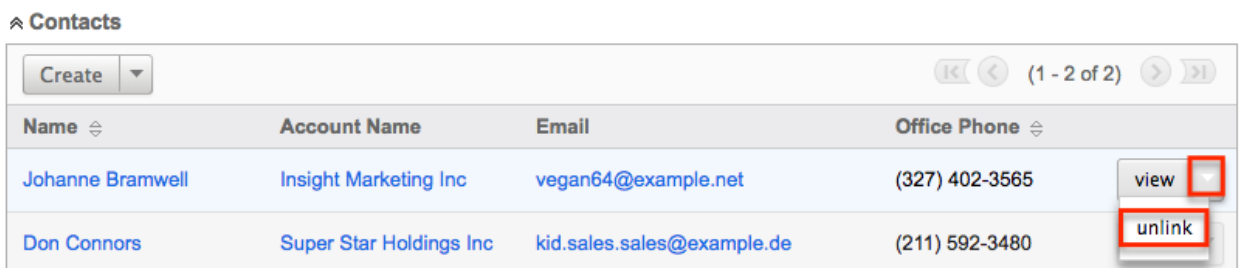
Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the most important fields. For more information on modifying subpanels, please refer to the [Studio](#) documentation.

Column Sorting

You can sort all of the related records in each subpanel by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that each subpanel may be sorted by only one column at a time.

Pagination

The top right of the subpanel shows which records of the total results set are currently being displayed. The two single-arrow Next and Previous buttons can be used to scroll through the records page-by-page. The two double-arrow First Page and Last Page buttons allow you to skip to the beginning or the end of the set.

By default, Sugar displays 5 records per subpanel results set, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation.

Edit View

The module's edit view allows records to be edited at any time to update or add information as necessary. The Edit View layout is available for most Legacy modules and can be accessed by clicking the Edit button on the upper left of the detail view.

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

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

Pagination

On the upper right of the Edit View layout, there are two single-arrow Next and Previous buttons which allow you to page through each record in the list view's current search results. Clicking the Left arrow button displays the previous record of the current search results while clicking the Right arrow button displays the next record of the current search results allowing you to edit records as necessary. The text in between the arrows, shows which record result you are currently editing within the total number of current results. Once the necessary changes have been made, you can click "Save and Continue" if you wish to save the details in the current record and proceed with editing the next record.

Editing Records

Records may be edited at any time to update or add information to the record. Once in the edit view, update the necessary fields available on the layout then click "Save" to preserve the changes. You can click "Cancel" at any time to return to the previous page without editing the record.
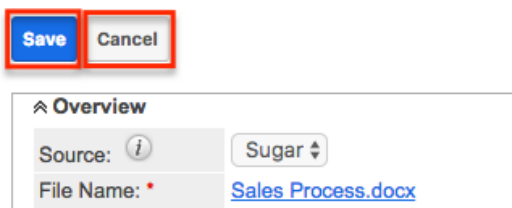
Administrators in Sugar can configure the Edit View layout via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation.

Editing Related Fields

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

- **Relate** : Most one-to-many relationships in Sugar are represented by a relate field. Relate fields on the edit view layout display an Arrow and "X" button to the right of the field. You can either click the Arrow button to select a related record from the record selection window or begin typing in the open text box to pull up a list of records matching the keyword.
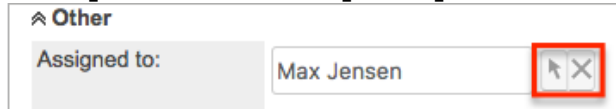
- **Flex Relate** : Allows a dynamic module and a record from that module to be related to the current record. Users can first select the module from the dropdown list then choose or enter the record they wish to relate to the current record they are viewing.
- **Email Addresses** : Email address fields can be linked to many different email addresses for a single record. Click the Plus button to add an email address to a record.
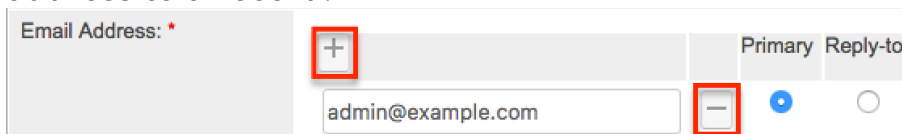
  Note: Only one email address can be selected as the Primary. Click the minus sign to remove an email address from a record.
- **Teams** : The Teams field specifies which team or teams of users have visibility of each record.
  - If there are multiple teams on a record, click "Show" to view all of the teams.
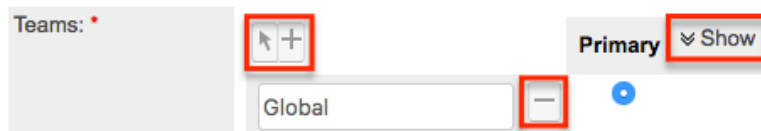
  - Click the Arrow icon to open the team selector window, or click the Plus icon to add a new row to use the type-ahead feature.
  - Click the Minus icon to remove a team from the record and select only one team to be the primary team.
  - For more information on teams, please refer to the [Team Management](#) documentation.

Using the TinyMCE Text Editor

TinyMCE is a third-party WYSIWYG tool that allows users to provide HTML formatting in specific sections in Sugar without requiring any HTML knowledge. TinyMCE is available when composing email or email templates from the Emails module or creating workflow email templates.

The following are some descriptions of the more commonly used features in TinyMCE:

- **Text Formatting** : Use the folllowing buttons to format text to be bold, italics, underlined, or stricken through.
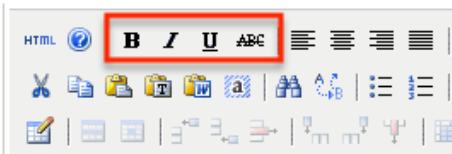
- **Alignment** : Use the following buttons to change the alignment of the text to be left, center, right, or justified.
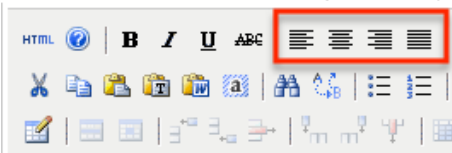
- **Fonts** : Use the following dropdowns to select special section formatting, fonts, and sizes.
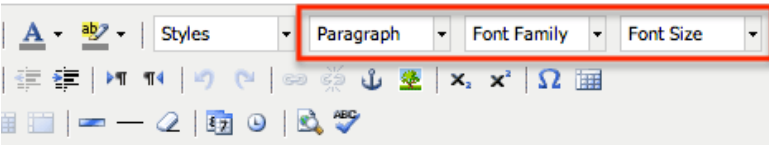
- **Layout Formatting** : Use the following buttons to utilize bullet list, ordered lists, and tables.
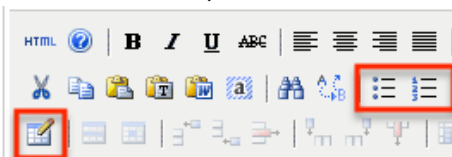
- **Links and Images** : Use the following buttons to create a link, remove a current link, or add an image.
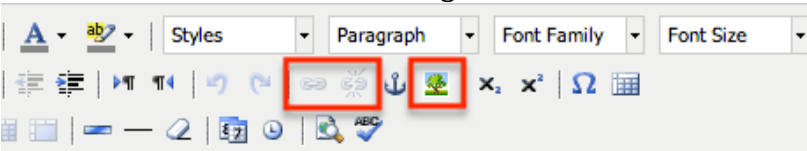
- **Advanced HTML** : Click the HTML button to view your content in full HTML code. You may add and change the HTML to furthur refine your content.
  Not all HTML is allowed to be saved in Sugar. The following are some examples of HTML that will be removed when saved:
    - Anything outside of the <body></body> tags.

- Any <style></style> tags.
- Any <script></script> tags.
- Any <form></form> tags.
- Inline CSS can be added to some elements.
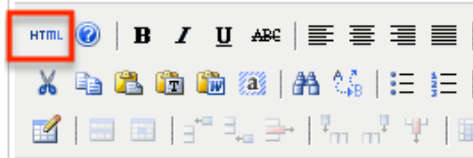
Note: Inline CSS can be added to some elements (e.g. <p>, <pre>, and <span>), but due to different email clients rendering HTML email in unexpected ways, inline CSS is not allowed on some elements (e.g. <div>, <img>, and <table>).

Last Modified: 2019-09-11 15:40:30

Activity Streams

Overview

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

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

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

The modules currently enabled to generate record posts for the activity stream are Accounts, Bugs, Calls, Cases, Contacts, Leads, Meetings, Notes, Opportunity, Quoted Line Items, Revenue Line Items, and Tasks. This documentation will go over the basics of the activity stream as well as the various options available when viewing posts, creating posts, commenting on posts, etc.

Viewing Activity Streams

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

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

Note: Activity streams are not available for custom modules.

Viewing via Home Page

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

Viewing via Dashlet

The My Activity Stream dashlet displays the user's main Activity Stream within a dashboard, eliminating the need to navigate to the Activity Streams view to monitor the most recent stream activities. Like other Activity Stream views, the

dashlet supports inline commenting on specific stream activities, but it does not allow record previews. The dashlet may be added to your home page or to the intelligence page of any module's list view or record view. When added to an Intelligence Pane, the My Activity Stream dashlet will display stream items in context to the data within the main container of the page. For more information on the My Activity Stream dashlet, please refer to the [Dashboards and Dashlets](#) documentation.

Viewing via List View

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

Viewing via Record View

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

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

Viewing via Intelligence Pane

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

Activity Stream Views

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

Post Options

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

Filter Options

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

Refresh Button

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

Preview Button

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

Comment Button

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

Post Icon

To the left of each post is the Post icon which allows users to easily identify the module that a record post is specific to, the user who created the post, etc. The

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

Right Hand Side Drawer

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

More Posts

The activity stream loads an initial number of posts with the option to show

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

Personalizing Activity Stream

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

Following Records

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

Favoriting Records

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

Unfollowing Records

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

From list view:

From record view:

Creating User Posts

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

name (e.g. @John Smith) or # followed by the records name (e.g. #ABC Company) in your post. For more information on the different post options available, please refer to the User Post Options section.

Creating via Home Page

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

Creating via List View

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

Creating via Record View

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

User Post Options

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

Adding Rich Content and External Messages

Users have the option to add external links, images, and videos as well external

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

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

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

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

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

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

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

Adding Attachments

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

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

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

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

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

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

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

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

Adding via Dashlets

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

Referencing Users and Records

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

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

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

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

Viewing Field Changes

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

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

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

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

Commenting on Posts

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

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

Previewing Posts

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

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

that the contact is now linked to, the account record will display when previewing the post.

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

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

Accessibility

Overview

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

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

Shortcut Keys

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

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

Global Shortcut Keys

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

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

List View Shortcut Keys

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

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

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

Record View Shortcut Keys

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

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

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

Customizing Shortcut Keys

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

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

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

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

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

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

4. Click "Save" to preserve your changes.

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

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

Tabbing in Sugar

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

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

Tabbing in Global Search

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

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Dashboards and Dashlets

Overview

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

Most modules and views include [out-of-the-box default dashboards](#) which include some [commonly-used dashlets](#). Sugar admin users may modify these stock, default

dashboards or create additional dashboards to push to teams of users. Users can also create additional dashboards or pull shared dashboards onto their view from the Dashboards module and even create duplicates of existing dashboards to customize for their own use. If more than one dashboard is available for a particular view, users may switch between them using the view's dashboard selection list.

Users with a Sugar Serve license type have access to a specialized dashboard called Service Console. It is a shared, default Home page dashboard that provides a powerful work environment for customer service agents by incorporating SLAs and region-specific business hours, insightful dashlets, and a cohesive case research and action experience. For more information, refer to the Service Console documentation.

Understanding Dashboards

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

Dashboards in Views vs the Dashboards Module

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

- **Dashboards in Views** : Every-day use of dashboards occurs in the Home page as well as list view and record view intelligence panes on Sidecar modules. Accessing dashboards in these locations will be referred to as "dashboards in views". The Dashboards in Views section of this page details the actions you can take when using dashboards in views.
- **Dashboards Module** : Certain actions are not available with accessing dashboards in views, particularly actions associated with sharing dashboards with other teams and making dashboards visible in views. These tasks are accomplished in the Dashboards module which includes a Dashboards list view and record view. The Dashboards list view can be accessed when viewing any dashboard in a view by selecting "Manage Dashboards" from the dashboard selection list. Viewing a dashboard in the Dashboards module does not display its dashlets or provide many of the actions available when using them in views. The Managing Dashboards section of this page details the actions you can take when accessing the Dashboards module.

Shared Dashboards

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

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

Teams Access

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

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

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

Favorites and Default Dashboards

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

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

When the Default Dashboards field is unchecked, a dashboard will only appear on a user's views when the user has marked it as a favorite. Dashboards can be favorited via the Dashboards list view or record view. To remove a dashboard from

the view, users can simply unmark the Favorites designation, either from the dashboard itself or from the Dashboards module. For more information, refer to the Pulling Dashboards to Your Views section below.

Personalizing Shared Dashboards

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

Out-of-the-Box Default Dashboards

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

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

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

Users with a Sugar Serve license type have access to a specialized dashboard called Service Console. It is a shared, default Home page dashboard that provides a powerful work environment for customer service agents by incorporating SLAs and region-specific business hours, insightful dashlets, and a cohesive case research and action experience. For more information, refer to the Service Console documentation.

Using Dashboards and Dashlets

Dashboards with their dashlets are available on the list view and record view of Sidecar modules. For example, to access the Accounts record view dashboards, click the Accounts tab in Sugar's header. Then, click one of the account names that appear to open its record view. Ensure the intelligence pane is expanded by clicking the arrow icon at the top right of the list view. For more information about intelligence panes, refer to the [User Interface](#) page.

Dashboards are also available on the Home page which can be accessed by clicking the Cube icon at the top left of any Sugar page. For more information about the Home module, refer to the [Home](#) documentation.

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

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

Dashboard Actions Menu

The Actions menu at the top of each dashboard allows you to perform various actions on the current dashboard. The options in the Dashboard Actions menu allow you to perform the following operations which are explained in more detail in the sections below:

Option	Description
[Create](#)	Create a new dashboard.
[Edit](#)	Rename the dashboard, delete the dashboard, add dashlet rows and dashlets, and rearrange and delete dashlet rows.
[Duplicate](#)	Create and make changes to your own, private copy of the original dashboard without affecting what other users see.

Open All/Close All	Collapse or expand all dashlets on the dashboard at once. Note that Sugar will remember the closed or open state of your dashlets the next time you return to the view.

Creating Dashboards

Create a new dashboard and build out its dashlets. New dashboards are automatically assigned to the creating user and their private team.

Users can create dashboards in list view and record view intelligence panes and on the Home page. By default, new dashboards will be assigned to the creating user with the Teams field set to the creating user's private team. The dashboard will also be automatically designated as a favorite so that it appears on the user's view after being created. To make the dashboard available for other users, additional teams can be added to the Teams field via the dashboard's record view. Click "Manage Dashboards" from any dashboard selection list to access the Dashboards list view, then click a dashboard's name to open it in record view. Admin users also have the ability to check the Default Dashboards field to push the dashboard onto the views for all members of the associated teams.

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

1. Click the Create button on the upper right of the intelligence pane.

   Accounts List Dashboard ▾   ☆   **Create** ▾

2. Enter in the name for the new dashboard (e.g. My Favorites Dashboard).
3. Add any desired dashlets by adding rows along with the number of columns to display the dashlet(s). For more information on adding dashlets, please refer to the Adding Dashlets section.
   Note: Dashboards will support up to ten rows of dashlets.

   My Favorites Dashboard   Cancel   **Save**

   Add a Row
   + 1 column

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

Duplicating Dashboards

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

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

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

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

To create a copy of a dashboard, simply select the Duplicate option from the Dashboard Actions menu.

Editing Dashboards

Editing dashboards from an intelligence pane or the Home page allows you to customize it to suit your business needs. To enter edit mode, simply select "Edit" from the Dashboard Actions menu.

From edit mode, you can rename the dashboard, delete the dashboard, add dashlet rows and dashlets, as well as rearrange and delete dashlet rows. For more

information, please refer to the [Deleting Dashboards](#), [Adding Dashlets](#), [Rearranging Dashlets](#), and [Deleting Dashlets](#) sections.

Dashboards can also be renamed via the [Dashboards module](#) by modifying the Name field. For Home dashboards, users can also [change the number of columns](#).

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

Switching Between Dashboards

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

Between default dashboards, shared dashboards, and personal dashboards, users may have multiple dashboards active for a single Sugar view (e.g. Accounts list view). The dashboards selection list contains all of the user's active and default

dashboards for the particular view and allows for switching between the dashboards. In order for a dashboard to appear in a view's dashboard selection list, the following criteria must be true:

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

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

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

Deleting Dashboards

When a dashboard is no longer useful, it can be deleted by the Assigned To user or

an admin user. Deleting a dashboard will make it unavailable for any other users with whom it is shared.

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

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

1. Click the triangle next to the Create button then select "Edit".

   My Favorites Dashboard ▾   ★   Create ▾
                                          Edit
   My Favorite Accounts
                                          Duplicate

2. Click the Delete button on the upper right of the dashboard and click "Confirm" to finalize the deletion.

   My Favorites Dashb   ★   Cancel   **Delete**   Save

Dashboards can also be deleted via the [Dashboards module](#) from both list view and record view.

Removing Dashboards From Views

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

   Action Items ▾   ★   Create ▾

The Favorite designation is also available to edit via the [Dashboards module](#).

Adding Dashlets

Users can add up to ten rows of dashlets to existing or new dashboards to suit

their business needs. Adding dashlets can be done when the dashboard is in edit mode either during [dashboard creation](#) or when [editing an existing dashboard](#).

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

With your new dashboard in edit mode, use the following steps to add a new dashlet in the Accounts list view intelligence pane as an example:

1. Click "+ 1 column" in the Add a Row box.
   Note: Dashboards on the Home page may offer 1 to 3 columns depending on the selected layout.

Favorite Accounts	Cancel	**Save**

   Add a Row
   + 1 column

2. Click the Add a Sugar Dashlet box that appears.

   ↕ ⚙

   Add a Sugar Dashlet®

   ✚

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

   Add a Sugar Dashlet®   Cancel

   Search by Title, Description...

Title ⬍	Description ⬍	
List View	Lists records from a particular module accordi...	👁
Most Useful Published Knowledge Base Articles	Displays the most liked and viewed knowledge...	👁
My Activity Stream	View a list of activities performed on records a...	👁

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

5. The dashlet will now appear in your dashboard. Click "Save" at the top right of the dashboard to preserve your changes.

Rearranging Dashlets

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

You can also edit the dashboard to rearrange the dashlets. In edit mode, each dashboard row displays an Up and Down arrow icon on the upper right. Users can click the icon then drag the entire row up and down within the dashboard.

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

Editing Dashlets

Dashlets can easily be configured to display specific information users want to view. Simply click the Gear icon at the top of the dashlet menu bar then select "Edit", which will display configuration options specific to the dashlet. Make the

necessary changes using the available edit options then click "Save" to preserve the change. For more information about specific dashlets and how to configure them, refer to the [Commonly Used Dashlets](#) section.

Note: Dashlet Gear menus, including the Edit option, are only available to the containing dashboard's Assigned To user and system admin users. Any change to a shared dashboard will update the dashboard for all users.

Deleting Dashlets

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

Users can also delete dashlet rows which may contain multiple dashlets for Home page dashboards. While editing the dashboard, click the dashlet row's Gear icon and select "Remove".

Note: Dashlet Gear menus, including the Delete option, are only available to the containing dashboard's Assigned To user and system admin users. Any change to a shared dashboard will update the dashboard for all users.

Collapsing and Expanding Dashlets

Users can collapse or expand individual dashlets by clicking the Up or Down arrow on the upper right of the dashlet. Sugar will remember the state of your dashlets the next time you return to the view. For dashboards on intelligence panes, users can also collapse or expand all dashlets on the dashboard by clicking the triangle next on the upper right and selecting "Close All" or "Open All".

Refreshing Dashlets

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

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

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

Note: Dashlet Gear menus, including the Refresh option, are only available to the containing dashboard's Assigned To user and system admin users.

Managing Dashboards

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

Note: To make changes to dashlets or the layout of your dashboard, edit the dashboard via its Dashboard Actions menu from an intelligence pane or the Home page.

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

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

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

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

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

Dashboard Module Fields

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

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

Working With the Dashboards Module

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar

modules. The sections following this Working With Dashboards section describe Dashboards-specific behaviors and functionality.

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

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

Sharing Dashboards With Teams

When a dashboard is first created, it is automatically assigned to the creating user

and his or her private team. In order to make the dashboard available for others to use, the Teams field must first be updated to grant those users access. Refer to the Teams Access section for more information.

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

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

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

Pulling Dashboards to Your Views

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

1. Navigate to the module and view where you would like to see the shared dashboard.
2. Select the Manage Dashboards option.

3. Locate the dashboard you wish to use.
4. Mark the dashboard as a favorite by clicking the star icon in the list view or record view.

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

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

Pushing Dashboards to Teams

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

A dashboard can be pushed to its associated teams by updating the Default Dashboard checkbox when [editing the record](#). Only admin users can edit the Default Dashboard field.

Default Dashboard

☑

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

Reassigning Dashboards

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

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

Assigned to

Select User...

Sara

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

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

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

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

Commonly Used Dashlets

The following sections cover many commonly used dashlets that may appear on your default dashboards or can be added to your dashboards. Please note that the dashlets available to view and add will vary between the modules in Sugar.

Note: Dashlet Gear menus, including the Edit, Remove, Refresh, etc. options, are only available to the containing dashboard's Assigned To user and system admin users. Any change to a shared dashboard will update the dashboard for all users.

List View Dashlet

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

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

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

- **Title** : Change the displayed name of the dashlet.
- **Module** : Change the module that the dashlet is displaying records from by

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

- **Display Rows** : Specify how many rows or results this dashlet will display at once. Please note that the maximum is twenty rows.
- **Auto Refresh** : Choose a time frame to have the dashlet query automatically refresh.
- **Filter** : Click the Filter option to select a pre-defined filter or create a new filter to be applied to the List View dashlet.
  - ○ **Note**: The My filter (e.g. My Accounts) is selected by default.

The following are options that are only available when configuring a list view dashlet on a record view:

- **Relate to current record** : Specify if the dashlet will be filtered to only list records related to the record you are viewing.
- **Linked field** : This field is shown only when "Relate to current record" is enabled; the dropdown will display all of the fields in the selected module that link back to the current record. In most cases, there will only be one field listed, but there are a few exceptions. For example, a Quotes list view dashlet on the Accounts record view can link to quotes where the account is either the billing account or the shipping account. Specify which of these account fields should link to the current record.

Creating a Filter

The Filters section of the Configuration Options page allows you to filter your dashlet based on pre-defined filters (e.g. My Favorites, Recently Created) as well as create custom filters. For example, if you select "My Contacts" in the Filter options, the List View dashlet will only display contact records that are assigned to you. To see all records to which you have access, simply select the All option in the filter.

The following Filter options are available to filter the List View dashlet:

- **Create** : Create a new custom filter which you can use to filter the List View dashlet
- **All "Module"** : Select this filter to display all records in the module to which you have access
- **My Favorites** : Select this filter to only display records you have marked as favorites
- **My "Module"** : Select this filter to only display records assigned to you
- **Recently Created** : Select this filter to only display records you created in the module within the last 7 days
- **Recently Viewed** : Select this filter to only display records you have viewed in the module within the last 7 day

Users can also create new filters via the Create option in the Filter list. This allows users to add custom, complex filter options when filtering the List View dashlet. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists. Please note that each one of the filter's criteria needs to be true for a record in order for it to appear in the List View dashlet. The fields available to filter the dashlet are based on specified fields in the Search layout in Studio. Any changes made to the Search layout in Studio will be reflected in the filter's field dropdown list. For more information on configuring the Search layout, please refer to the [Studio](#) documentation in the Administration Guide.

The following steps cover creating a new filter for contacts assigned to Will Westin as an example:

1. Click the Filter option on the Configuration Options page then select "Create".
2. Select the field (e.g. Assigned to) you wish to add to your filter as well as the condition (e.g. is) and matching criteria (e.g. Will Westin).
     - **Note**: Only fields you have view access for will be available to add in the Filter list.
3. To add additional fields to the new filter, click the Plus button to the right of the filter.
     - To remove fields from the new filter, click the Minus button to the right of the filter.
     - To clear any filter values (e.g. Will Westin), simply click the "x" to the right of the value.

4. Enter in a name for the new filter (e.g. "Contacts assigned to Will Westin").

5. Click "Save" to add this filter to the dashlet list view's Filter options.

The custom filter will automatically be applied to the dashlet upon save and all records meeting the filter criteria will display. Please note that you can edit the custom filters at any time by selecting the filter (e.g. Contacts assigned to Will Westin) from the Configuration Options page, then clicking the name that appears to the right of the Filter option. Simply make the necessary changes to the custom filter then click "Save" to preserve and apply the changes to the dashlet.

When viewing the List View dashlet, the first set of records meeting the filter criteria will be displayed, and you can click the More link (e.g. More accounts) at the bottom of the dashlet to display additional records. The number of records that load each time you click the link depends on the display row number (5, 10, 15, 20) selected in the Configuration Options page. Simply scroll down the dashlet list view to view all records that are loaded. Please note that dashlets set to display 5 rows will show the dashlet's height increasing slightly when initially clicking the More "Module" link to display more records at once. Any subsequent clicks on the link will load the next set of results and be viewable by scrolling. The More link will no longer appear once all records meeting the dashlet's filter criteria are loaded in the dashlet list view results.

Steps to Edit a Dashlet

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

The following steps cover updating the title, display rows, columns, and only my favorites filter for the My Accounts dashlet as an example:

1. Click the Gear icon at the top of the My Accounts dashlet menu bar then select "Edit".

2. Change the "Title" (e.g. My Favorite Accounts) and the display rows from 5 to 10.

3. Click the "x" next to "Billing Country" to remove the field from the display column.
   - To add columns, simply click your mouse in the Columns field then select from the list of available fields that appear below the dropdown list.

4. Click the Filter option then select "My Favorites".
5. Once the update is complete, click "Save" and the dashlet will reflect the changes made.
   - Click "Save" on the dashboards edit layout to apply the changes to

your final dashlet view.

Multiple List View dashlets can be added to the intelligence pane as well if you wish to view the list of records for various modules. For more information on adding dashlets, please refer to the Adding Dashlets section. You can also refresh and remove the dashlet by clicking the Gear icon. To collapse the dashlet, simply click the Up arrow to the left of the Gear icon.

Active Tasks Dashlet

The Active Tasks dashlet allows users to view open tasks that require attention and need to be completed on a future or current date. Open tasks have a status of "Not Started", "In Progress", or "Pending Input". The dashlet is broken up into three tabs: "Due Now", "Upcoming", and "To Do", and displays a number on each tab to indicate the count of open tasks falling into each due-date range.

- **Due Now** : Open tasks that are due today and open tasks where the due date is in the past
- **Upcoming** : Open tasks that have a due date in the future
- **To Do** : Open tasks that have no due date specified

When placed on a user's Home page dashboard, the Active Tasks dashlet will show all active tasks assigned to the logged-in user or all active tasks that the logged-in user has team permission to view, depending on how the user has configured the dashlet's settings.

When the Active Tasks dashlet is placed on the record view for a related module (e.g. Accounts, Contacts), it will only show the active tasks that have a relationship with the current record. For example, if the Active Tasks dashlet is placed on the Account module's record view, when a user views ABC Account, the Active Tasks dashlet will only show the active tasks that are related to ABC Account.

You can close tasks as completed directly from the dashlet by clicking the Completed button to the right of the task's row. In addition, you can delete the task's relationship with the record by clicking the Unlink button to the right of the Completed button.

To access a task's record view, simply click the task's subject in the dashlet. There are two buttons on the upper right of the dashlet which allow you to toggle between viewing tasks assigned to you and all tasks to which you have access. You can click the one person button to quickly view task records for which you are the assigned user. To remove this filter and view tasks assigned to others as well as yourself, simply click the group button to the right of the one person button. You can also relate new tasks to the record by clicking the Plus icon on the upper right of the dashlet and selecting "Create Task". Complete the Tasks record view layout and save to create the new task. The Gear icon to the right of the Plus icon allows you to edit, refresh, close, and remove the dashlet. To collapse the dashlet, click the Gear icon then select the Close option. To expand the dashlet, simply click the Gear icon again and select "Open".

Inactive Tasks Dashlet

The Inactive Tasks dashlet allows users to view tasks that are on-hold or have already been completed. The dashlet is broken up into two tabs, "Deferred", "Completed", and displays a number on each tab to indicate the count of tasks falling into each status.

When placed on a user's Home page dashboard, the Inactive Tasks dashlet will show all inactive tasks assigned to the logged-in user or all inactive tasks that the logged-in user has team permission to view, depending on how the user has configured the dashlet's settings.

When the Inactive Tasks dashlet is placed on the record view for a related module (e.g. Accounts, Contacts), it will only show the inactive tasks that have a relationship with the current record. For example, if the Inactive Tasks dashlet is placed on the Account module's record view, when a user views ABC Account, the Inactive Tasks dashlet will only show the inactive tasks that are related to ABC Account.

You can delete the task's relationship with the record by clicking the Unlink button on the task's row.

To access a task's record view, simply click the task's subject in the dashlet. There are two buttons on the upper right of the dashlet which allow you to toggle between viewing tasks assigned to you and all tasks to which you have access. You can click the one person button to quickly view task records for which you are the assigned user. To remove this filter and view tasks assigned to others as well as yourself, simply click the group button to the right of the one person button. You can also relate new tasks to the record by clicking the Plus icon on the upper right of the dashlet and selecting "Create Task". Complete the Tasks record view layout and save to create the new task. The Gear icon to the right of the Plus icon allows you to edit, refresh, close, and remove the dashlet. To collapse the dashlet, click the Gear icon then select the Close option. To expand the dashlet, simply click the Gear icon again and select "Open".

History Dashlet

The History dashlet allows users to view a history of the record's related activities (e.g. calls, meetings, emails) that have already taken place. The activity types are broken up into three tabs (Meetings, Emails, Calls) and a number on each tab indicates the relevant count of historical activity records. You can also filter (Last 7 Days, Last 30 Days, Last Quarter) the History dashlet to only display a specific subset of the activities meeting the set time frame.

Clicking the Plus icon on the upper right of the dashlet displays the Archive Email option which allows users to manually enter received emails for historical purposes. An explicit relationship is formed between an archived email and the current record while implicit relationships are also created to other records based on any email addresses entered in the email. Simply enter the required information (e.g. Date Sent, From, Subject) along with the email body in the Compose Email window, then click "Archive" to save the email record. Please note that the archived email will display in the record's Emails subpanel as well as in the History dashlet. The Gear icon to the right of the Plus icon allows you to edit, refresh, close, and remove the dashlet accordingly. To collapse the dashlet, click the Gear icon then select the Close option. To expand the dashlet, you can simply click the Gear icon again and select "Open".

In addition, there are two buttons on the upper right of the dashlet which allow you to toggle between viewing the record's activities assigned to you and activities assigned to users in other teams. You can click the one person button to quickly view the record's calls, meetings, and emails for which you are the owner. To view the record's activities for all users on your team, simply click the multi-group button to the right of the one person button.

Planned Activities Dashlet

The Planned Activities dashlet provides users with a list of open or upcoming calls and meetings that are related to the current record you are viewing. The activity types are broken up into two tabs (Meeting, Call) and a number on each tab indicates the relevant count of planned activity records. You can filter the dashlet

to view either the current day's scheduled activities or upcoming activities in the future by toggling between the Today or Future button. Please note that any open activities where the start date is prior to the current date will display an Overdue status for the specific activity in the dashlet. Once the activities have taken place or are completed, they will appear within the History dashlet.

In addition, there are two buttons to the right which allow you to toggle between viewing the record's scheduled activities assigned to you and activities assigned to users in other teams. Please note that you can use both sets of buttons (Today, Future, one person, multi-group) concurrently to further filter and view the information you need. For example, you can click the one person button plus the Future button if you wish to view all upcoming activities specifically assigned to you for the current record.

To create a new meeting or call, simply click the Plus icon on the upper right of the dashlet and select either "Schedule Meeting" or "Log Call". Once the Meeting or Call record view layout opens, enter the necessary information and click "Save" to create the activity. For more information on creating calls and meetings in Sugar, please refer to the Creating Records section of the User Interface documentation.

The Gear icon on the upper right of the dashlet allows you to edit, refresh, close, and remove the dashlet accordingly. To collapse the dashlet, click the Gear icon then select the Close option. To open up the dashlet, you can simply click the Gear icon again then select "Open".

To the right of the meeting and call record's row is a set of buttons that allow you to mark the activity as held, delete the call or meeting's relationship with the current record, as well as accept, tentatively accept, or decline the call or meeting.

Notes & Attachments Dashlet

The Notes & Attachments dashlet allows users to relate an existing note as well as a new note record to the module record. To create a new note, click the Plus icon on the upper right of the Notes & Attachments dashlet then select "Create Related

Record". Once the Notes record view layout opens, enter the necessary information then click "Save". For more information on creating notes, please refer to the [Creating Records](#) section of the User Interface documentation. To relate an existing note, click the Plus icon then select "Link Existing Record". The Search and Select Notes page will open allowing you to select the note record you wish to relate to the module record.

To delete the record's relationship to a note record, click the Unlink button to the right of the attached note post. Please note that this removes the relationship, but does not delete the record itself.

The Gear icon on the upper right of the dashlet allows you to [edit](#), [refresh](#), close, and [remove](#) the dashlet accordingly. To collapse the dashlet, click the Gear icon then select the Close option. To open up the dashlet, you can simply click the Gear icon again then select "Open".

My Activity Stream Dashlet

The My Activity Stream dashlet displays the user's main Activity Stream within a dashboard, eliminating the need to navigate to the Activity Streams view to monitor the most recent stream activities. Like other Activity Stream views, the dashlet supports inline commenting on specific stream activities, but it does not allow record previews. For more information on Activity Streams, please refer to the [Activity Streams](#) documentation.

Note: If you cannot access activity streams, the feature may have been disabled via Admin > System Settings. For more information, refer to the [System](#) documentation in the Administration Guide.

The Gear icon on the upper right of the dashlet allows you to [edit](#), [refresh](#), and [remove](#) the dashlet accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon. To open up the dashlet, you can simply click the arrow again.

When added to an Intelligence Pane, the My Activity Stream dashlet will display stream items in context to the data within the main container of the page. For example, if you add the dashlet to a dashboard on the main Accounts module page, the main container of the page contains the Accounts list view. Therefore, the My Activity Stream dashlet will restrict activity stream items to only those activities related to the Accounts module. Similarly, if the dashlet is added to the Opportunity module's Intelligence Pane, the My Activity Stream dashlet will restrict activity stream items to only those activities related to the Opportunities module. If the My Activity Stream dashlet is added to any record view's Intelligence Pane dashboard, the dashlet will restrict activity stream items to only those activities related to the record displayed in the main container on the page.

To filter the My Activity Stream dashlet, edit the dashlet and click once on the Filter button. Choose any of the pre-defined Activity Stream filters, such as "Messages for Post", which will restrict the stream to only items that were posted by users, and then click "Save". For more information on Activity Stream filters, please refer to the Activity Streams documentation.

It is good practice to also rename an edited dashlet accordingly so that it is clear that this dashlet is displaying a filtered view. To change the dashlet's title, edit the dashlet, type a new name into the text box that contains the words "My Activity Stream", and then click "Save".

To add a comment or reply to the Activity Stream via the My Activity Stream dashlet, click on the Comment button next to the relevant stream entry, type your reply, and then press the Reply button. For more information about interacting with Activity Streams, please refer to the Activity Streams documentation.

Cases Summary Dashlet

The Cases Summary dashlet also appears in the intelligence pane of the Accounts record view. It allows users to view status information for cases related to the specific account record. The case summary is broken up into multiple tabs (Summary, New, Pending Input, Assigned) and displays a number on each tab to

indicate the relevant count of the open, closed, new, and pending cases. Please note that the record must have at least one related case in order for data to appear within the dashlet and the status tabs (Pending Input, New, Assigned) will appear if there is a related case meeting that particular status.

The dashlet is not available for Sugar Sell users. For more information on license types and the functionality available for each, refer to the User Management documentation.

The Gear icon on the upper right of the dashlet allows you to edit, refresh, and remove the dashlet accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon. To open up the dashlet, simply click the arrow again.

The Summary tab displays a donut chart that shows the breakdown of open cases versus closed cases. If you hover over the breakdown it will display the number of open and closed cases for the record. The Pending Input tab displays a list of all pending cases related to the current record. The New tab displays a list of all new cases related to the current record. The Assigned tab displays a list of all open cases related to the current record. Users can easily view the case details by clicking the record's subject link under each tab. Please note that you can also mark a case as a favorite by clicking the star icon to the left of the case subject under each tab (Pending Input, New, Assigned).

Comment Log Dashlet

The Comment Log dashlet is available to add to Sidecar record views and displays the contents of the Comment Log field for the current record. It lists the entries in descending order with the newest at the top. You can also quickly create new entries by typing in the open text box then clicking the "Add" button. The dashlet shows the three most recent entries but you can open the rest of the entries by clicking "View All". If another user adds an entry while you are viewing the dashlet, you must refresh the dashlet to see the new entry. The dashlet is only available to Sugar Sell and Sugar Serve users and is included automatically in the Service Console. For more information about comment logs including mentioning records and users, refer to the User Interface documentation.

Interactions Dashlet

The Interactions dashlet is available to add to the Accounts, Cases, Leads, and Opportunities record views and shows a history of calls, emails, meetings, and notes that have taken place related to the record you are viewing. The interactions are listed in descending order with the newest at the top. The dashlet is only available to Sugar Sell and Sugar Serve users and is included automatically in the Case Detail drawer of the Service Console.

Each interaction can be expanded or collapsed using the arrow on the righthand side to show or hide the record's preview. Note that this dashlet only shows calls and meetings that are not in a "Scheduled" status.

The Plus (+) icon in the top right corner allows you to create new interactions (e.g. call) related to the current record (e.g. cases) you are viewing. Each menu item opens its respective module's record view in a drawer where you can create a new call, email, meeting, or note record related to the record in context. See the Calls, Emails, Meetings, and Notes pages for more information on creating these records.

Record View Dashlet

The Record View dashlet is available to add to most Sidecar record views and uses a tabbed view to allow users to see records related to the one they are viewing. If the current record can only be related to one record of the selected module (i.e. one-to-one and many-to-one relationships), the tab displays the single related record's detail view. For relationships to many records of that module (i.e. one-to-many and many-to-many relationships), a list view is displayed. Users can configure which of the current record's relationships to display in up to six total tabs. The dashlet is only available to Sugar Sell and Sugar Serve users and is included automatically in the Case Details drawer of the Service Console.

The Record View dashlet is available on all Sidecar modules except the following: Quotes, Opportunities, Calls, Meetings, Revenue Line Items, Emails, and Forecasts.

To open a different tab, click the name of the tab across the top. When viewing a single record tab, the record can be edited directly in the dashlet by clicking an individual field or clicking the Edit button. Once you are done editing, click the Save button to preserve your changes.

To configure the tabs on the dashlet, click the Gear icon in the top right corner and select "Edit". On the screen that opens, you can change the dashlet's title, and the Tabs field across the top allows you to specify which tabs you would like displayed. The first option will start with the word "This" and represents a record view tab of the record currently in focus. When applying the dashlet to a record view, it is recommended to remove the "This..." tab so that information is not duplicated on the screen and a related records tab can be shown first. Click the Tabs field to select more tabs or click a tab's X icon to remove it. Beneath the Tabs field, a preview of the dashlet is available. Clicking each tab allows you to view how the tab will be displayed and, for list view tabs, allows you to configure the tab. You can specify which columns to display, how many rows to display, and how often the list view data should be automatically refreshed. Tabs showing a single record cannot be configured in the dashlet as they are controlled by the module's Record View Dashlet layout which can be configured by admin users via Studio.

Note: Only the Record View Dashlet layouts for the Accounts and Cases modules can be configured in Studio.

Product Catalog Dashlet

The Product Catalog dashlet allows users to easily access the Product Catalog and instantly add products from the catalog as line items on the quote worksheet. The dashlet appears to the right of the page when creating a new quote, and also on the Quotes record view intelligence pane. For more information on utilizing the Product Catalog dashlet in the Quotes module, refer to the Quotes documentation.

You can also access the Product Catalog from other Sidecar modules (e.g. Opportunities, Calls) simply by adding the Product Catalog dashlet to the intelligence pane dashboard. Please note that unlike the Quotes module, the Product Catalog dashlet will be read-only when added to other modules. You can search for products using the Search field on the dashlet, as well as click the icon to the left of a product's name to view complete details of its Product Catalog record. When viewing the details of the record, you can mark the product as a favorite by clicking the star icon on the upper left of the product catalog's record view. Once the product is marked as a favorite, it will appear in the Product Catalog Quick Picks dashlet on opportunities and quotes.

RSS Feed Dashlet

The RSS Feed dashlet allows you to view external RSS or Blog feeds via the dashboard on the intelligence pane. When adding the dashlet, you will need to enter in the desired feed URL (e.g. "https://news.google.com/news/headlines/section/topic/TECHNOLOGY?ned=us&hl=en&gl=US") in the Feed URL field. You can also select a value in the "Number of entries to show" field to display the most recent 5, 10, 15, or 20 entries from the feed and specify an auto-refresh interval (e.g. Every Hour) if desired. Once the dashlet is added to the intelligence pane, the applicable feeds will display and you can click the title of each feed to access the full story on the parent site. If you wish to access the full site where the RSS feeds originate from, simply click the title (e.g. Technology - Google News) below the dashlet header.

The Gear icon on the upper right of the dashlet allows you to edit, refresh, and remove the dashlet accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon. To open up the dashlet, you can simply click the arrow again.

Saved Reports Chart Dashlet

The Saved Reports Chart dashlet allows you to view pre-defined report charts as well as charts of your saved reports. When adding a Saved Reports Chart dashlet, you can select from the pre-defined report charts as well as any custom report charts to which you have access. Summation-type, summation with details-type, and matrix-type reports have the chart option available to view as dashlets.

When adding the reports chart dashlet, you will first select your desired report via the Select a Report option. You can either type the first few characters of the report's name and select from the type-ahead results or click "Search and Select..." below the search box to select your desired report from the Search and Select Reports drawer. Please note that only reports with charts will be available to add to the dashlet. The Auto Refresh option allows you to choose a time frame (e.g. Every 30 Minutes) that you wish to have the dashlet query automatically refreshed.

In addition, the following configuration options allow you to define how the chart will display:

Note: The configuration options available may vary slightly between the report chart types.

- **Chart type** : Select the type of chart (e.g. Pie Chart, Funnel Chart) to display.
    - The chart type initially defaults to the chart type defined in the originating report.
    - The available chart types will vary between reports.
    - For more information on chart types, please refer to the [Reports](#) documentation.
- **Show total** : Enable the checkbox to display the report's total value on the dashlet.
    - The total value in the report chart dashlet dynamically updates to display the total as reflected in the originating report.
- **Show legend** : Enable the checkbox to display the full chart's legend on the dashlet.
- **Show x-axis label** : Mark the checkbox to display the chart's x-axis title on the dashlet.
    - A title from the originating report will populate automatically, but you can specify a different title for display in the dashlet by entering a new value in the open text box.
    - This option only applies to bar charts and line charts.
- **Tick display methods** : Enable the appropriate options based on how you wish to display x-axis labels with long texts on the chart dashlet. When all three options are enabled, Sugar will apply the display methods in order ("Wrap ticks", "Stagger ticks", "Rotate ticks") and display the x-axis labels based on the best option.
    - **Wrap ticks** : Wraps x-axis labels to the next line.
    - **Stagger ticks** : Staggers x-axis labels in alternating positions.
    - **Rotate ticks** : Rotates x-axis labels diagonally instead of across.
    - This option only applies to vertical bar charts and line charts.
- **Show y-axis label** : Enable the checkbox to display the chart's y-axis title on the dashlet.
    - A title from the originating report will populate automatically, but

you can specify a different title for display in the dashlet by entering a new value in the open text box.

- This option only applies to bar charts and line charts.
- **Bar chart value placement** : Select where the chart values (e.g. End, Middle) will be positioned for bar-type charts.
  - The Top option applies to bar grouped-type charts (e.g. Horizontal Bar Grouped Chart) with an un-stacked data series.
- **Bar chart display options** : Enable the appropriate options based on how you wish to view data on the chart.
  - **Allow scrolling** : Scroll the chart up-and-down or left-to-right on the dashlet, if applicable. Disabling this option re-sizes the chart to fit the full dashlet width.
    - Scrolling will work for charts where the data exceeds the size of the dashlet width.
    - This option only applies to bar charts.
  - **Stack data series** : Displays a stacked bar for each grouping in the report chart broken into sub-sections of data. Disabling this option displays separate bars for each sub-section in the same grouping.
    - This option only applies to grouped bar charts (e.g. Vertical Bar Grouped Chart).
  - **Hide empty groups** : Hides any empty data groups from the chart, if applicable.
    - This option only applies to bar charts.

Opportunities By Lead Source		Cancel	**Save**

Select a Report	Auto Refresh
Opportunities By Lead Source ✕ ▾	None ▾

Chart type

Vertical Bar Grouped Chart ▾

Show total	Show legend
☑	☑

Show x-axis label	Tick display methods
☑ Lead Source	☑ Wrap ticks ☑ Stagger ticks ☑ Rotate ticks

Show y-axis label	
☑ Count	

Bar chart value placement	Bar chart display options
End ▾	☑ Allow scrolling ☑ Stack data series ☑ Hide empty groups

Once the dashlet is added, click the Gear icon on the upper right to [edit](#), [refresh](#), or [remove](#) the dashlet as necessary. In addition, you can select the View Report option to access the originating report's [detail view](#) which will open in a new browser tab. Please note that you will only be able to view a report according to your team membership, user access type, and assigned roles. The report may also

be edited to update or add information as necessary as long as your ability to edit reports in Sugar is not restricted by a role. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration Guide. If any changes are made to the report, the reports chart dashlet on your Home page will reflect the changes after saving the report and refreshing the dashlet.

To collapse the dashlet, simply click the Up arrow to the left of the Gear icon. You can click the colored circles in the chart legend to toggle whether or not that segment appears in the chart. Users can also drill through to view a list of records associated with a particular chart section by clicking on the section. For more information about drilling through report charts, please refer to the [Reports](#) documentation.

Note: Dashlet Gear menus, including the View Report option in the Saved Reports Chart dashlet, are only available to the containing dashboard's Assigned To user and system admin users.

Module-Specific Dashlets

Certain modules (e.g. Forecasts) in Sugar contain dashlets that are built specifically for that module. For the Forecasts module, the intelligence pane displays dashlets that allow users to view key information regarding the various forecast stages, likely amounts, best amounts, etc. For more information regarding these forecast-specific dashlets, please refer to the [Forecasts](#) documentation.

The Gear icon also appears on the upper right of these dashlets to allow users to [edit](#), [refresh](#), and [remove](#) the dashlet's accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon and to open up the dashlet, simply click the arrow again.

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Service Console

Overview

Users with a Sugar Serve [license type](#) have access to Service Console, a Home page dashboard that provides a powerful work environment for customer service agents by incorporating SLAs and region-specific business hours, insightful dashlets, and a cohesive case research and action experience. Its functionality is broken into two tabs. The Overview tab comes pre-built with nine dashlets focused on assisting customer service users track and complete their work. The second tab, named "Cases", presents a prioritized list of the current user's open cases. Clicking a case's row opens a Case Detail drawer which displays a wealth of information and provides the tools needed to work the case to completion.

Out-of-the-box, Service Console is a shared, default Home page dashboard and can be accessed by clicking the Cube icon's down arrow and selecting "Service Console" from the menu.

Prerequisites

Sugar Serve Initialization

Service Console makes heavy use of the Case module's Follow Up Date field which is set according to your organization's SLAs and business hours by the [Sugar Serve SugarBPM template](#). Several related records must be set up, and an admin must configure the SugarBPM template in order for follow up dates to be calculated correctly. For detailed instructions, refer to the [Getting Started With SugarBPM for Sugar Serve](#) and [Stock SugarBPM - Case Follow-Up Date Management](#) articles.

Access and Permissions

Although Service Console shares some behaviors with standard shared dashboards, it is also specialized and, therefore, has some key differences:

- **Visibility** : Serve Console follows the visibility and availability rules of other shared dashboards with the additional requirement that users must have a Sugar Serve license type. By default, Serve Console is shared with the Global team and set as a default dashboard, meaning it will appear in the home dashboards list for all users who are members of the Global team and have a Sugar Serve license type. An admin user may need to alter its Team field to push Service Console to additional users.
- **Editability** : The following rules govern the editability of the various parts of Service Console:
  - The Overview tab shares the behavior of standard shared dashboards in that it can be edited to add, remove, or modify its dashlets by system admin users with a Serve license type or by a regular Serve user who is assigned to the dashboard.
  - The Case tab's prioritized list view cannot be modified.
  - The Case tab's Case Detail drawer cannot have its dashlets rearranged, removed, or added to, but each existing dashlet can be configured. These configurations can only be made by admin users with a Sugar Serve license type; regular Serve users cannot configure them.
- **Duplication** : Service Console cannot be duplicated.
- **Deletion** : Service Console cannot be deleted.

Overview Tab

Service Console's overview tab contains, by default, nine dashlets which aim to assist customer service professionals to track and organize their work. Admin Serve users and the Serve user assigned to the Service Console dashboard are able to edit the tab just like a standard dashboard to add, remove, or modify its dashlets. The following dashlets appear by default:

- My Open Cases by Followup Date
- Planned Activities
- Active Tasks
- My Open Cases by Status
- My Recently Viewed Cases
- My Cases in the Last Week by Status
- Open Cases by User by Status
- My Cases Resolved This Month by Week

- Status of Open Tasks Assigned by Me

Cases Tab

Service Console's Cases tab contains a [prioritized list view](#) of the current users' open cases which can be clicked to reveal a [Case Detail drawer](#) where the case can be worked to completion. Its features and functionality are described in the following sections.

Prioritized List View

The Cases tab of the Service Console displays a prioritized list of open cases assigned to the current user. This list is ordered by the cases' follow up dates, a value set according to your organization's SLAs and business hours by the [Sugar Serve SugarBPM template](#), which requires admin configuration prior to use. The Cases tab itself includes [counts of cases](#) grouped according to how soon their follow up dates are due. [Actions](#) you can take for each case are available in a dropdown menu to the left of each row. Each row of the prioritized list contains detailed [case information](#) and can be clicked to open a [Case Detail drawer](#) in order to further investigate and work each case to resolution. The list view automatically refreshes every five minutes to keep its counts, statuses, and follow up date information current.

Note: The case counts and list of cases include any case, assigned to the current user, which is not in a status of "Closed", "Duplicate", or "Rejected". If you have added other statuses to the dropdown values of the Case module's Status field, the

counts and list will include cases in those custom statuses.

Case Counts

The Cases tab includes counts of all open cases which are assigned to the current user. The counts are broken into three groups according to follow-up date and colored red, yellow, or white based on how much time you have until they are due:

- **Red** : The number of cases assigned to the user with a follow up date that has already passed
- **Yellow** : The number of cases assigned to the user with a follow up date in the next 24 calendar hours
- **White** : The number of cases assigned to the user with a follow up date more than 24 calendar hours in the future

Note: The Follow Up Date field is set according to your organization's SLAs and business hours by the [Sugar Serve SugarBPM template](#) which requires admin configuration prior to use.

Note: The yellow and white counts use 24 calendar hours and do not take into account business hours. This means that cases due within the next work day may not appear in the yellow box. For example, when a business center is closed over the weekend, on Friday afternoon, a case due Monday morning will be counted in the white box rather than the yellow box even though it is due within the next business day.

Row Actions

To the left of each row is a dropdown menu of actions you can take on the row's case. Click the down arrow to access the following options:

- **Edit in New Tab** : Opens a new tab with the case's record view in edit mode
- **Copy Record URL** : Copies the URL of the case to your clipboard
- **Open in New Tab** : Opens a new tab with the case's record view

Case Information

The Cases tab lists cases which are assigned to the current user are listed in order of their follow-up dates. Clicking anywhere within a case's row opens the [Case Detail drawer](#) within the Service Console. The following information is displayed in each case's row:

- **Number** : The case's Number field
- **Priority** : The case's Priority field
- **Status** : The case's Status field, stacked beneath its priority and color-coded as follows:
    - **Green** : New
    - **Blue** : Assigned

  Note: If **Purple** : Pending Input the Status field's dropdown list to remove the stock New, Assigned, and Pending Input options, these colors can be utilized by creating custom options using those exact words as the Item Name value. Any custom statuses with other Item Name values will be colored blue.
- **Time until follow Up** : The amount of calendar time until or since the follow up date and color-coded as described below, stacked on top of the case's Follow Up Date field
    - **Red** : A follow up date that has already passed
    - **Yellow** : A follow up date in the next 24 calendar hours

  Note: The yellow A follow white date more 24 calendar hours and do the future into account business hours. This means that cases due within the next work day may not be marked yellow. For example, when a business center is closed over the weekend, on Friday afternoon, a case due Monday morning will be marked white rather than yellow even though it is due within the next business day.
- **Follow Up Date** : The case's Follow Up Date field, stacked beneath the amount of time until or since the follow up date

  Note: The Follow Up Date field is set according to your organization's SLAs and business hours by the [Sugar Serve SugarBPM template](#) which requires admin configuration prior to use.

- **Subject** : The case's Subject field, stacked on top of its description
- **Description** : The case's Description field, stacked beneath its description
- **Business Center** : The case's Business Center field
- **Account** : The case's related account's name, stacked on top of the account's service level
- **Account's Service Level** : The case's account's service level, stacked beneath the account's name
- **Assigned To** : The user assigned to the case

	Num...	Priority/S...	Follow Up	Subject/Description	Business ...	Account	Assigned to
▼	202	Medium Assigned	2 hours ago 07/28/2019 08:00	Trouble creating reports I'm trying to make a report that displays the curre...	USA - East ...	Kaos Trading Ltd Tier 2	Chris Olliver
▼	23	High Assigned	in 7 minutes 07/28/2019 10:30	System not responding This morning, the instance is showing 500 errors f...	USA - East ...	Riviera Hotels Tier 2	Chris Olliver
▼	68	Low Assigned	in an hour 07/28/2019 11:45	Warning message when using the wrong browser User jacobs is seeing a warning message in the mo...	USA - East ...	Chandler Logistics Inc Tier 3	Chris Olliver
▼	70	High Pending Inpu	in 7 hours 07/28/2019 17:30	Need assistance with large customization Randal has our specifications and has given assist...	USA - East ...	Chandler Logistics Inc Tier 3	Chris Olliver
▼	39	Medium New	in a day 07/29/2019 11:00	Need to purchase additional licenses The team is growing. Can someone contact me to ...	USA - East ...	EEE Endowments LTD Tier 3	Chris Olliver

Note: While the case counts within the Cases tab will include all cases related to the current user, the cases list can display a maximum of 100 rows.

Case Detail Drawer

Clicking a case's row in the Service Console opens a drawer which serves as a single location to gather information about the case and its related records, review past interactions and progress, communicate with the customer, and process the case to its completion. The drawer contains four dashlets geared towards helping with these actions which are described in the following sections. You can quickly switch which case's details are displayed by clicking a different row from the list still displayed in the background. To close the drawer, click the X icon at the top left of the drawer or press your Escape key. While the prioritized list view refreshed automatically every five minutes, the Case Detail drawer does not. Switch between cases or close and reopen the drawer to see refreshed information.

Note: While the dashlets cannot be rearranged, removed, or added to, admin users with a Sugar Serve license type have the ability to change their configurations. For information about editing dashlets, refer to the [Dashlets and Dashboards](#) documentation or the documentation for each of these specific dashlets linked in the sections below.

Case Record Dashlet

On the top left of the Case Detail drawer is a Record View dashlet. Out-of-the-box, it is configured to display the case you are currently viewing as well as additional tabs containing its related tasks, contacts, and documents. The dashlet, as a whole, provides a concise replacement for the case's full record view by displaying not only the case's fields but also making the case's most important subpanel contents available via additional tabs. The case record can be edited directly in the dashlet by clicking an individual field or clicking the Edit button. Once you are done editing, click the Save button to preserve your changes. The related record tabs display lists of records with a relationship to the current case record. For more information, refer to the [Record View dashlet](#) documentation.

Comment Log Dashlet

The top right of the Case Detail drawer contains the Comment Log dashlet. This dashlet displays the case's Comment Log field's entries with the most-recent entry on top. You can also quickly create new entries by typing in the open text box then clicking the "Add" button. For more information about comment logs including

mentioning records and users, refer to the [User Interface](#) documentation.

Related Account Record Dashlet

On the bottom left of the Case Detail drawer is another Record View dashlet, simiiar to the top left. Out-of-the-box, this dashlet displays the account related to the current case, providing additional customer information and the ability to edit the related account without having to navigate from the case. For more information, refer to the [Record View dashlet](#) documentation.

Case Interactions Dashlet

The bottom right of the Case Detail drawer contains the Cases Interaction dashlet. This dashlet displays the case's related emails, past calls, past meetings, and notes with the most recent interactions on top. Clicking the down arrow on an interaction will expand its row to display a preview of the record. When previewing emails, any email attachments can be downloaded by clicking the attachment's name. You can also quickly create new interactions by clicking the Plus button in the dashlet header and selecting the type of record you wish to create. Doing so will open a quick create drawer and automatically select the current case in the new record's Related to field. For more information, refer to the [Interactions dashlet](#) documentation.

Last Modified: 2019-12-11 20:12:12

Search

Overview

Sugar comes with the ability to search across the entire system to easily locate and filter records in the system. Users can perform a search via the module's list view, record view, as well as global search. The module search allows you to locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the module list view or subpanel view of the record. Global search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. This documentation will go over the basics of the various search options and cover how to perform a search, filter a search, view results, etc.

Global Search

Global Search allows users to search for information across their entire Sugar database as opposed to restricting searches to a specific module. The Global Search bar displays on the upper right of every Sugar page and utilizes Full-Text Search to search throughout nearly all fields and modules for an enhanced search experience. For more information on performing searches within a single module, please refer to the List View Search and Record View Search section.

By default, Sugar comes out-of-the-box with a defined list of fields for each module that users can search as well as view in the search results on the View All Results

page. Please note that secondary fields (e.g. email address, office phone, start date) will display in the View All Results page only if they contain a value. In addition, if there is a match found in a searchable field, it will display on the View All Results page even though it is not defined as a displayed field for the module. For example, if you enter a search (e.g. John) and the system finds a match in the case's Description field, but the Description field is not configured in the record view layout for cases, the case record will appear on the View All Results page along with the description as the secondary field because it contains the search term.

Note: All email addresses (e.g. primary, secondary) in the record are included in the search. Primary email addresses have a higher relevance compared to the other email addresses for search results.

Module	Searchable Fields	Fields Displayed on View All Results Page
Accounts	Name, Email Address, Billing Street, Shipping Street, Office Phone, Fax, Alternate Phone, Description, DUNS, SIC Code	Name, Primary Email Address, Office Phone
Bugs	Subject, Bug Number, Description, Work Log	Subject, Bug Number, Status
Calls	Subject, Description	Subject, Start Date, End Date, Status
Campaigns	Name, Objective, Description	Name, Type
Cases	Subject, Description, Case Number, Resolution, Work Log	Subject, Case Number
Contacts	First Name, Last Name, Home Phone, Office Phone, Mobile Phone, Other Phone, Fax, Primary Address Street, Alternate Address Street, Portal Name, Description, Email Address	Name, Primary Email Address
Contracts	Contract Name, Description, Reference Code	Contract Name, Status
Custom Basic Type	Name, Description	Name

Custom Company Type	Name, Office Phone, Alternate Phone, Fax, Email Address, Billing Street, Shipping Street, Description	Name, Primary Email Address, Office Phone
Custom File Type	Document Name, Description	Document Name
Custom Issue Type	Subject, Number, Description, Work Log	Subject, Status
Custom Person Type	First Name, Last Name, Home Phone, Mobile Phone, Office Phone, Other Phone, Fax, Primary Address Street, Alternate Address Street, Description, Email Address	Name, Office Phone, Primary Email Address
Custom Sale Type	Name, Description, Next Step	Name, Expected Close Date
Documents	Document Name, Description	Document Name
Emails	Subject, Date, From	Subject, Date, From
Employees	First Name, Last Name, Email Address	
Knowledge Base	Name, Body, Description	Name
Leads	First Name, Last Name, Email Address, Home Phone, Mobile Phone, Office Phone, Other Phone, Fax, Primary Address Street, Alternate Address Street, Description	Name, Primary Email Address, Office Phone
Manufacturers	Name	Name
Meetings	Subject, Description, Location	Subject, Start Date, End Date, Status
Notes	Subject, Description	Subject
Opportunities	Opportunity Name, Description, Next Step	Opportunity Name, Expected Close Date
Product Categories	Name, Description	Name

Projects	Name, Description	Name, Status, Priority
Project Tasks	Name, Description	Name, Status
Quoted Line Items	Name, Mft Part Number	Name, Status
Quotes	Quote Subject, Description, Purchase Order Number, Quote Number, Billing Address Street, Shipping Address Street	Quote Subject, Quote Number, Quote Stage
Revenue Line Items	Name, Description, Next Step	Name, Expected Close Date
Target	First Name, Last Name, Email Address, Description, Primary Address Street, Alternate Address Street	Name, Primary Email Address
Target Lists	Name, Description	Name
Tasks	Subject, Description	Subject, Status, Due Date

Please note that not all fields in Sugar are enabled by default for search, but can be enabled by an administrator. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. If the administrator globally disables a module for search, you will not be able to perform a search on that module or filter by that module when searching. For more information on how to enable and disable certain fields and modules in Global Search, please refer to the Studio documentation as well as the Search section of the System documentation in the Administration guide.

To use global search, you need to first enter a keyword into the search box and the pop-up results will begin appearing once you enter at least one character. Please note that clicking on the search bar will expand it across Sugar's navigation bar, which spans across the top of the screen. To minimize the search bar, simply click anywhere outside of the search bar or hit the Esc key on your keyboard.

Note: Elastic search strips out the non-numeric characters ("-", "()") from phone numbers so you can just enter the digits (e.g. 4082269800) when searching.

Once expanded, you will be able to access the Module dropdown by clicking the down arrow on the far left of the search box. This allows you to configure some aspects of global search such as what module(s) (e.g. Accounts, Contacts) to filter your search results by in Sugar. If you wish to clear your search term, simply click the X icon to the far right of the search box. Please note that this will collapse the search bar as well.

By default, up to five search results will display below the search box and include the primary field (e.g. name, subject) for the records matching your search term. The specific term (e.g. abc) in the record's field is bolded to indicate the match to the search term. In addition, if any secondary fields (e.g. office phone, description) match the search term as well, it will display beneath the record's primary field in the Quick Search Results list, with the matching term bolded. For any email addresses that include the matching search term, the entire email address (e.g. support@abc.com) will be bolded instead. Please note that the Quick Search Results list will display up to three matching fields for the record. To view all matching results, simply hit the Enter key while focused on the search bar or click the View all results link at the bottom of the Quick Search results list and you will be navigated to the [View All Results](#) page. Click the appropriate record (e.g. ABC Family Associates) in the Quick Search Results list to access the record's details. Please note that users assigned a role restricting view access to a module (e.g. Cases), will not be able to view search results specific to that module.

You can also perform tag searches using Global Search to easily locate groups of records that are tagged by common attributes. For more information regarding tagging records, please refer to the [Tags](#) documentation. For example, if you have a set of leads that were acquired from a specific conference and you wish to locate all the lead records tagged with this value, you can perform a search using the tag value. As you search, the list of matching tags will appear in the tag ribbon beneath the search box and display up to five tags matching the search term.

Simply select the appropriate tag (e.g. 2018 Western Conference) from the tag ribbon and the tag pill will get entered into the search box. If you wish to remove any selected tag pills from the search box, simply click the "x" to the right of the

tag name. All matching records tagged with "2018 Western Conference" will display beneath the search box.

You can append additional search terms or tags in the search box if you wish to further narrow your search. Simply enter the keyword (e.g. Jeanette) to the right of the existing search term and the matching result(s) will display. If you search using multiple tags, the system will look for records that match any one of the tags in the search box using the "or" operator.

Please note that clicking the tag pill in the module's record view or the record's preview in the intelligence pane will navigate you to the View All Results page which will display the list of records that contain the same tag. When viewing the module's list view, dashlet list view, or subpanel list view, you can click the tag link to be navigated to the View All Results page.

Note: You cannot click the tag pill when editing the record to access the View All Results page.

Operators

When performing a search via global search, you can use operators such as "AND", "OR", and "NOT" in your search query to further narrow the search results. Please note that there must be at least three characters entered for each search term, and the operators must be entered in all caps (e.g. AND, OR, NOT) otherwise Sugar will consider it as a keyword to search on.

Note: Quotation marks cannot be used in multiple word searches (e.g. "John Smith") to return exact matches. So entering John Smith in your search query will return: **John** Moore with a street address of "123 **Smith** Dr.", **Smith** Company with a description of "Primary point of contact is **John** Lee", etc.

Operator	Description	Example
"AND"	Use this operator to specify search criteria where all keywords must match for records to be included in the search result.	**John AND Texas** : Search returns records (e.g. contacts) that include "John" and "Texas" in the searchable fields (e.g. Name, Primary Address City).
"OR"	Use this operator to specify search criteria where at least one keyword must match for records to be included as a search result.	**95111 OR 95113** : Search returns records (e.g. accounts) that include the digits "95111" or "95113" in the searchable fields (e.g. Billing Postal Code).
"NOT"	Use this operator if you wish to exclude records containing a specific keyword in the search query.	**John NOT Texas** : Search excludes records (e.g. contacts) that include the term "Texas" in the searchable fields (e.g. Billing State) then evaluates the remaining query to return records including "John".

The "AND" operator is implicitly added when there is a space between the search strings. For example, if you enter "John Smith AND California" into the search box, Sugar will look for records that include the term "John", "Smith", and "California" in the searchable fields (e.g. Name, Billing State). If there are records that match the search terms in the query, the record will display in the Quick Search Results list. The term(s) (e.g. Smith) in the record's fields will be bolded in the search result to indicate the match to the search term.

When entering your search criteria, you can also use a combination of the operators. Use parentheses if you wish to group a part of your search query. When using the parentheses to create subqueries, Sugar will first parse the subquery contained in the parentheses before evaluating the remaining query. For example, if you enter: "(Johnson OR Jonson) AND Systems", Sugar will return records including "Systems" with "Johnson" as well as "Systems" with "Jonson" in the searchable fields (e.g. Name: **Johnson Systems**, Name: **Jonson** with Website: www.**jonsonsystems**.com).

Note: When using the NOT operator, please keep in mind that it cannot be used in direct combination with parentheses (e.g. NOT (John Smith)).

The following are example search queries using the available operators in global search:

Search Criteria	Matching Search Results
Jane AND @example.com	**Jane** Roberts Email: jroberts**@example.com**
	ABC Company Primary Address Street: 123 **Jane** St. Email: support**@example.com**
	J Thomas Email: **jane@example.com**
(NOT John OR NOT Jane) Smith	Bob **Smith** Email: bob.**smith**@example.com
	Mary Smith Email: marys@**smith**company.com

(ABC Technologies) OR (ABC Corporation) Brooklyn	**ABC** Inc. Billing Street: 123 **Technologies** Dr. Billing City: **Brooklyn**
	ABC Corporation Billing City: **Brooklyn**
Bob AND (Smith OR Jones) AND Idaho NOT Boise	**Bob Smith** Company Billing State: **Idaho** Billing City: Nampa
	Bobby Lee **Jones** Primary Address State: **Idaho** Primary Address City: Meridian
(Jenn OR Jennifer) Martin AND Texas	**JenniferMartin**ez Email: j**martin**ez@abc.com Primary Address State: **Texas**
	JennMoore Email: j**martin**@example.com Primary Address Street:123 **Texas** Dr.

Viewing All Results

If there are more than five matching results, you can click on "View all results" at the bottom of the Quick Search Results list to view all matching records. The View All Results page loads an initial number of records meeting the current search criteria with the option to show additional results at the user's request. The total number of matching search results will display on the upper left of the page. By default, Sugar displays 20 records for each search results set on the View All Results page, but Administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide. To load the next set of Global Search results, simply click on "More search results" at the bottom of the View All Results page.

If you wish to view the full details of a record, click the record's name to open the record view (or detail view for Legacy modules). You can also view a record's details directly from the View All Results page by clicking the Preview icon to the far right of a record's row. Please note that preview is only available for modules (e.g. Contacts, Leads) using the Sidecar user interface. The record's details will display in the intelligence pane to the right of the View All Results page and will provide users with key information regarding the record as well as any related activity stream information. For more information on previewing via the intelligence pane, please refer to the [Dashboards & Dashlets](#) documentation.

Filtering the View All Results Page

When not in preview mode, the intelligence pane to the right of the search results displays various Filter options (e.g. Assigned to Me, Created by Me) that allow you to further narrow the search results on the View All Results page. Please note that the filters only apply to the set of search results based on your current search query.

Each of the filter options displays a number in parentheses to indicate the number of records from the View All Results page that meet the criteria. Any filter option (e.g. My Favorites) that displays a zero count will not be clickable as there are no records that meet the criteria. As you select filter options, the search results on the page will dynamically change to only display records meeting the currently applied filter(s). In addition, the counts for all of the filter options will dynamically change to indicate the total count of records that meet the currently selected filter(s). For example, if you select "Leads" under the Modules filter, the counts next to each of the other filter options (e.g. Created By Me, Modified by Me) will change according to the number of results which are both a lead and match the particular filter (e.g. Created By Me).

Selecting multiple filter options within a single filter (e.g. Modules) will use an "or" operator. So if you select "Leads" and "Contacts" from the Modules filter, the View All Results page will display both lead and contact records. However, if you select filter options from different filters, it will use an "and" operator. For example, if you select "Leads" from the Modules filter and select "Created by Me", Sugar will only return lead records that you created.

To clear individual filters, click the filter again (e.g. Created by Me) to unselect the option. If you wish to clear all filters applied on the View All Results page, simply click the Reset button on the upper right of the intelligence pane.

To collapse a multi-option filter (e.g. Modules), you can click the Up arrow on the upper right of the filter. If you wish to collapse all multi-option filters (e.g. Modules) on the intelligence pane, click the Actions menu to the right of the Reset

button and select "Close All". To expand them, simply click the Actions menu again and select "Open All".

Filtering by Module

Global Search gives you the option to filter the search results by module by clicking the down arrow to the far left of the expanded search bar. Please note that the Search all option is selected by default to include all modules when searching. The list of available modules to select will appear in the Modules list and you can simply select the appropriate module(s) you wish to include in your search. For example, if you select the Contacts module then enter "john" in the search box, Sugar will only return matching contact records.

When three or fewer modules are selected from the Modules dropdown, the corresponding Module icons will display in the search bar.

However, if more than three modules are selected, it will display the Multiple Modules icon in the search bar.

Note: The selected module(s) will remain in the search bar until the user's browser cache is cleared.

If you wish to unselect all modules at once, simply select the Search all option from the Modules dropdown. Please note that manually deselecting all modules will default back to the Search all option as well.

Administrators can configure what modules are available to select in the Modules list via Admin > Search. For more information on configuring which modules are available to search via Global Search, please refer to the [Search](#) section of the System documentation in the Administration guide. Please note that only modules you have view access for will appear in the Modules list for Global Search.

Keyboard Navigation

Using the Tab key (Alt+Tab for Safari browser) on your keyboard enables you to easily navigate through Sugar's navigation bar which spans across the top of the screen. You will be able to use the Tab key to access the Global Search bar and perform a search. For more information on navigating around Sugar using your keyboard, please refer to the [Accessibility](#) documentation. Once you have tabbed into the Global Search field, enter at least one character to expand the global search bar. Please note that hitting the Enter key while in the search box will navigate you to the View All Results page where you can also perform a search. If you hit the Tab key within the search bar without entering in a search term, the Magnifying Glass icon will be highlighted and you can hit "Enter" to be navigated to the View All Results page as well.

Note: You can use global shortcut keys to access and exit the Global Search field as well. For more information regarding global shortcut keys, please refer to the [Accessibility](#) documentation.

Once you enter a search term, you can use the Up and Down arrow keys on your keyboard to navigate through the Quick Search Results list and hit "Enter" while focused on a specific quick search result (e.g. Jane Smith) to open up the module's record view (for Sidecar modules) or detail view (for Legacy modules). Please note that hitting the Tab key while navigating through the quick search results will close the Quick Search Results list and highlight the X icon in the Search bar, which will allow you to clear your keyword and perform a new search. Please note that the Global Search bar will collapse as well when clicking the X icon to clear search. Hitting the "Shift" and "Tab" key will close the Quick Search Results list and highlight the search term in the search bar, allowing you to perform additional searches.

In addition, you can easily navigate through the [Modules dropdown](#) list using the Up and Down arrow keys on your keyboard and hitting the Spacebar key to select or unselect a module. Hitting the Tab key while navigating through the Modules dropdown list will close the dropdown and take you back to the search bar. If you wish to clear the text entered in the search box, you can either click the X icon or hit the Tab key while in the search box to highlight the X icon, then hit "Enter" or the Spacebar key.

To navigate through the tag ribbon, you can use either the Tab key or Arrow keys on your keyboard. To add a tag pill to the search bar, simply hit the Enter key while focused on the tag pill (e.g. 2018 Latin America Conference) in the tag ribbon. Hitting the Enter key again on the newly added tag pill in the search bar will open up the View All Results page to display all matching results.

In addition, you can tab through the View All Results page to highlight and access certain elements (e.g. Search box, Intelligence Pane, Preview button) of the page. For example, if you press "Enter" while focused on the Preview button, the record's data will display to the right of the search result providing key information regarding the record.

Admin Configuration

Sugar administrators have the ability to globally enable and disable modules for Global Search. Please note that disabled modules will not be included in search results nor in the list of modules to filter. For more information on how to enable and disable modules for Global Search, please refer to the Search section of the System documentation in the Administration guide.

Administrators also have the ability to enable and disable specific fields for Global Search, as well as set the priority for searchable fields using boost values. To configure fields for search, simply navigate to Admin > Studio and update the Full Text Searchable option to either "Searchable" or "Disabled" depending on whether you want it included for search or not. The Full Text Searchable option is only available for the following data type fields: Phone, TextArea, TextField, and URL. Boosting is the process of enhancing the relevancy of a record's fields for global search. Fields with a higher boost level will be given greater weight when the search is performed. When a search is performed, matching records containing fields with a greater weight will appear higher in the search results. The default boost value is 1.0 which stands for a neutral boost. To apply a positive boost, set the boost value higher than 1. To apply a negative boost, use values lower than 1. For example, a value of 1.35 will positively boost a field by 135%. But using a value of 0.60 will apply a negative boost. Please note that it is not necessary to perform a full system index when boost values are changed for fields. For more information on how to enable or disable fields for Global Search or change the boost values, please refer to the Studio documentation in the Administration guide.

Global Search functions off of an index created from the data in your system. When creating and updating records, data is added and modified in the index accordingly. Occasionally the index can become corrupt or inefficient, which may require a system index to be performed. You can perform a system index manually via Admin > Search. For more information on how to run a system index on Full Text Search, please refer to the System documentation in the Administration guide.

Advanced Options

The Advanced Options panel is available on the view all results screen of Global Search to allow users to enable and disable modules for the Filter by list specific to their login. Please note that administrators have the ability to globally enable and disable modules for global search via Admin > Search. If the administrator globally disables a module, you will not be able to perform a search on that module or filter by that module when searching. The module will also no longer appear within the Advanced Options panel. For more information on how to globally enable and disable modules, please refer to the System documentation in the Administration guide.

List View Search (Sidecar Modules)

List view search enables users to easily and effectively search by a record name in a module-specific manner to pull up relevant results they wish to view. The matching records will populate in the list view below the Search bar. Please note that the system retrieves all records that start with the keyword entered in the search. When looking up names, Sugar performs an OR search for each name entered. Records matching any of the names entered will appear in the list view. Sugar's list view search also supports wildcard characters (e.g. %) to search for records without including the entire word in the search query. For example, a search for "%univ" will pull up any records containing "univ", including "The University of Miami", "Miami University" or "Universidad de Miami". For more information on how to use wildcards in list view searches, please refer to the Wildcards section.

In addition, the search provides a Filter option which can be used in combination with the open Search box to narrow your search further using the available options on the list. For more information on the available filter options, please refer to the Filter section.

When you choose a filter and run a search, Sugar will return records with a matching name from within the filtered list view results. For example, if you select "My Accounts" in the Filter list and enter an account name, Sugar will only return account records with a matching name that are assigned to you. You can also create new filters if you wish to add more complex filters for your search criteria. For more information on creating new filters, please refer to the [Creating a Filter](#) section. When you run a search using a saved or created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. Please note that searches using the open Search box only are not preserved when navigating away.

To see all records to which you have access, simply select the All "Module Name" (e.g. All Accounts) option in the filter. Please note that you will only be able to see records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

Wildcards

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

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

Please note that list view search automatically appends the wildcard character (%) to the end of your search phrase for each text field. This allows the system to pull up all records that include the keyword entered in the search.

When performing a multiple-word search, Sugar will behave differently based on the module (e.g. Accounts, Contacts) in which you perform the search. For example, performing a search for "Max Hold" in the Accounts module will match an account named "Max Holding Company" but will not match "Maximum Holding Company" because the wildcard is appended to the end of the entire query (e.g. Max Hold%). However, if the same search is performed for "Max Hold" in the Contacts module, it will return search results matching a contact named "Max Holder" as well as "Maximillian Holder" because it appends a wildcard to the end of each word in the query (e.g. Max% Hold%). Please note that the latter behavior applies to any person-type module (e.g. Leads) to account for search results that

may contain multiple words in the First Name and/or Last Name field (e.g. "Jean Paul" as a first name).

The following search examples illustrate List View search behavior:

Search Criteria	Matching Search Results	
	First Name	**Last Name**
rob	**Rob** **Rob**erta John	Smith Collins **Rob**erts
%bert	**Bert** Ro**bert**a John	Andernie Collins Ro**bert**s
r_b	**Rob**erta **R**u**b**y John	Collins Lieu **R**o**b**erts
%r_b	**Rob** John Mi**rab**el	Smith **R**o**b**erts Glaston
__it	Rob An**ita**	Sm**it**h Nother
r_b% smit%	**Rob**ert **Rob**	**Smit**h **Smit**e
rob smith	**Rob** **Rob**ert **Rob** Roy	**Smith** **Smith** **Smith**
smith	Rob **Smith**	**Smith** Johnson
jean	**Jean**nine **Jean** Paul	Pugh Gaultier
paul	Sue **Paul**	**Paul**son Jones
jean paul	**Jean** **Jean Paul**	**Paul** Gaultier

When performing a search, Sugar will try to match your search text to the beginning of a record's field. So, if an account name starts with an article like "A" or "The", this must be accounted for in the search by adding a wildcard (%) at the beginning of your text. For example, to properly pull up an account named "The ABC Company", you will have to enter "%abc" for Sugar to find a match in the system.

In addition, you can use the wildcard character when specifying the search criteria for custom filters with the "starts with" operator. Please note that the wildcard character will only work with the "starts with" operator. For example, if you wish to find all records containing the word "systems", then you can use the "starts with" operator and type "%systems" as the filter value. For more information on creating filters, please refer to the Creating a Filter section.

AND vs OR

When searching in the List View search, Sugar uses the "and" operator. This means that if you are searching against multiple fields in your filter option, Sugar will place an "and" in between each search field returning only records matching all (as opposed to any) of your search criteria. For example, if you select "My Accounts" in the Filter options and enter an account name, Sugar will only return account records with a matching name that are assigned to you.

The only time Sugar will use the "or" operator is when using a multi-select option in the search criteria. For example, you can create a custom filter for the Accounts list view search and select "Type", "is any of", then add "Analyst", "Customer", and "Partner". If you perform a search based on this new filter, the system will return account records that match any one of the values specified in the filter. For more information on creating custom filters, please refer to the Creating a Filter section.

Please note that if any additional fields (e.g. industry, status) are added to the custom filter, the operators between the Type field and the other fields will be an "and" operator.

Filter

List View search provides a Filter option which allows users to narrow their search further using the available options on the list.

The following options are available to users when filtering their List View search:

- **Create** : Create a new custom filter which you can use to filter your search
- **All "Module Name"** : Returns all records in the module to which you have access
- **My "Module Name"** : Returns only records assigned to you
- **My Favorites** : Returns only records you have marked as favorites
- **Recently Created** : Returns only records you created in the module within the last 7 days
- **Recently Viewed** : Returns only records you have viewed in the module within the last 7 days

When you choose a filter and run a search, Sugar returns records with a matching name from within the filtered list view results. You can use one of the default filter options from the list or create a custom filter if you wish to have more complex filters options when searching.

Note: Only the fields that you have permission to view and that the administrator has configured to be available will appear in the Filter list when creating a search filter. For more information on field-level permissions, please refer to the [Role Management](#) documentation in the Administration Guide. For more information on adding and removing fields to filters in list view, please refer to the [Studio](#) documentation in the Administration Guide.

When you run a search using a filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter. In contrast, searches performed using only the list view's Search box are not preserved when navigating away.

Creating a Filter

Users can create and save new filters via the Create option in the Filter list of the search bar. Filters may contain one or more fields and operators (e.g. is any of, is, starts with) along with their desired value(s). All of a filter's criteria must evaluate as true for a record to appear in the list view search result. Filters may also be saved as templates with empty field values to be completed at the time the filter is run. This is useful for searches that must be performed often against the same fields but with varying values.

The following steps cover creating a filter for accounts with a type of "Customer", "Competitor", or "Partner" and assigned to Sara Smith as an example:

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

   Note: You can also click "Create" to the right of the Filter option.

2. Select "Type" as the filter field and select the "is any of" operator then add "Competitor", "Customer", "Partner" as the search values. As you create the new filter criteria, it will be applied to the list view concurrently to display the matching results. To remove specific filter values (e.g. customer, partner), you can simply click the "x" to the right of the field or you can select "Reset" to the left of the Save button to clear all filter values.
   Note: The "is any of" operator allows the system to pull up records that match any one of the set values (customer, competitor, partner).
3. To add additional fields (e.g. Assigned to) to the new filter, click the Plus button to the right of the filter.
   Note: Only the fields that you have permission to view and that the administrator has configured to be available will appear in the Filter list when creating a search filter. For more information on field-level permissions, please refer to the Role Management documentation in the Administration Guide. For more information on adding and removing fields to filters in list view, please refer to the Studio documentation in the Administration Guide.
4. Select "Assigned to" as the secondary filter field and select the "is any of" operator then add "Sarah Smith".
5. Enter a descriptive title for the filter (e.g. Sarah's Accounts) in the field that contains "Enter new filter name...".
6. Click "Save" to add this filter to the module's Filter options.

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

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

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

Preview

Once the list view displays the search results, users can easily view the record's details directly from the module's list view by clicking the Preview icon to the far right of the record's row. The record's detail will display in the intelligence pane to the right of the list view and provide users with key information regarding the record as well as the related activity stream information. For more information on viewing previews, please refer to the [Previews](#) section of the User Interface documentation.

Record View Search (Sidecar Modules)

Users also have the ability to search for related records which appear in the subpanels of the record view. The Search bar appears below the record's fields and you can filter the view to only display a specific module (e.g. Leads, Contacts). You can search by a record name by entering the keyword into the Search bar, and the subpanel(s) with the matching record(s) will appear below. Please note that the system will retrieve records from the subpanel that start with the keyword entered in the search box. To clear the search, simply click the "x" to the right of the search keyword and all records meeting the search criteria will display in the corresponding subpanel(s). When you run a search using a saved or created filter,

the search will be preserved when you navigate away from the page.

To filter, simply click the Related option to the far left of the Search bar and select the module whose subpanel you wish to view. For more information on how to filter records for search, please refer to the [Filter](#) section. Please note that filter and search may be combined to only display matching records within the selected module's subpanel. To see all subpanels to which you have access, simply select "All" in the Related dropdown list.

Related Records Search

Users can search for related records simply by entering in the name of the record in the Record View's search box. Please note that the system will only search for related records which appear in the subpanels of the record view. The relevant record(s) meeting the search criteria will display in their respective subpanels. Users have the option to filter the view to only display a specific module if they wish by selecting the module (e.g. Contacts, Leads) from the Related list. For more information on searching within a specific module, please refer to the [Related Module](#) section.

Related Module

When searching for records which appear in the subpanels of the record view, you can filter the view to only display a specific module (e.g. Leads, Contacts). Simply click the Related option to the far left of the Search bar then select the module whose subpanel you wish to view. Please note that you can narrow your search further using the Filter option to the right of the Related option. For more information on searching using the Filter option, please refer to the [Filter](#) section.To see all subpanels to which you have access, simply select "All" in the Related dropdown list.

Wildcards

Wildcards can be used to search for criteria without including the entire word in the search. Use a wildcard character in place of characters you do not require in your search. You may use any combination of wildcard characters in the search box as you desire.

The following wildcard characters can be used when searching for related module records in record view:

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

Please note that search automatically appends the wildcard character (%) to the end of your search phrase for each text field. This allows the system to pull up all records that include the keyword entered in the search. If performing a multiple word search, the wildcard is only appended to the last word and not all words.

The following are example searches using wildcards in record search:

Search Criteria	Would Match	Would Not Match
rob	**Rob**, **Rob**ert, **Rob**in	Bob, Jacob
%bert	Al**bert**, **Bert**, Ro**bert**	Bart
r_b	**Rob**ert, **Rub**y	Bob, Raab
%s_i	Du**sti**n, Chri**sti**, **Smi**th	Sophie, Josephine

__it	**Nit**a, **Lit**trell	Schmitt
r_b% smit%	**Rob**ert **Smit**h, **RobSmit**e	Bob Smith, Robert Phillip
rob smit	**Rob Smit**h, **Rob Smit**e	John Smith

When performing a search, Sugar will try to match your search text to the beginning of a record's field. So, if an account name starts with an article like "A" or "The", this must be accounted for in the search by adding a wildcard (%) at the beginning of your text. For example, to properly pull up an account named "The ABC Company", you will have to enter "%abc" for Sugar to find a match in the system.

In addition, you can use the wildcard character when specifying the search criteria for custom filters with the "starts with" operator. Please note that the wildcard character will only work with the "starts with" operator. For example, if you wish to find all related contact records containing the word "smith", then you can use the "starts with" operator and type "%smith" as the filter value. For more information on creating filters, please refer to the [Creating a Filter](#) section.

Filter

Record view search provides a Filter option which allows users to narrow their search further using the available options on the list.

The following options are available to users when filtering their Record View search:

- **Create** : Create a new custom filter which you can use to filter your search.
- **All "Module Name"** : Returns all records in the module to which you have access
- **My "Module Name"** : Returns only records assigned to you
- **My Favorites** : Returns only records you have marked as favorites
- **Recently Created** : Returns only records you created in the module within the last 7 days
- **Recently Viewed** : Returns only records you have viewed in the module within the last 7 days

While in the record view, users can search for records which appear in subpanels beneath the record's fields and filter the view to only display a specific subpanel (e.g. Contacts, Accounts). When you choose a filter and run a search, Sugar

returns records matching the search criteria for the specified related module in the record view. You can use one of the default filter options from the list or create a custom filter if you wish to have more complex filter options when searching.

Creating a Related Records Filter

Users can also create new filters via the Create Filter option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the module's record view. You have the option to add multiple fields to your new filter and set select operators (e.g. is any of, is, starts with) along with the value(s) it must contain. Please note that each one of the filter's criteria need to be true for a record in order for it to appear in the subpanel view's search result. Unlike creating a filter for the list view search, you must first select a module from the Related list then select the Create option as it is specific to that module.

The following steps cover creating a filter for the related Contacts module located in the state of "CA" as an example:

1. Click the Related option on a module record view's (e.g. Accounts) search bar then select "Contacts".

2. Click the Filter option on the Search bar then select "Create".
   ○ You can also click "Create" to the right of the Filter option.

3. Select "State" as the filter field and select the "exactly matches" operator then enter "CA" as the search value. As you add in the filter criteria's, it will be applied to the subpanel view concurrently to display any matching results.
   ○ To clear any filter values (e.g. CA), simply select "Reset" to the left of the Save button.
   ○ You can also remove filter values by clicking the "x" within the search value (if applicable).
4. To add additional fields (e.g. Assigned to) to the new filter, click the Plus button to the right of the filter dropdown list.
5. Enter a descriptive title for the new filter (e.g. "Contacts in CA") in the field that contains "Enter new filter name…".

6. Click "Save" to add this filter to the related module's Filter dropdown list.

The filter will now appear as an option in the Filter list when "Contacts" is selected as the related module. Please note that you can easily delete custom filters by selecting the filter from the Filter list of the related module (e.g. Contacts), clicking the filter's name (e.g. Contacts in CA) on the search bar, then clicking "Delete" on the filter details panel. You can also edit the custom filter as necessary via the filter details panel then click "Save" to preserve the changes.

Activity Stream Search

The record view's activity stream displays all posts specific to the current record you are viewing. Please note that users can view all post's in the record view's activity stream even if they do not follow the record in Sugar. To access the record view's activity stream, navigate to the module's record view (e.g. ABC Company) then click the Activity Stream button below the module's fields. For more information on activity streams, please refer to the Activity Streams documentation. You can filter the posts on the activity stream based on the activity type by selecting one of the available options on the Filter list. For more information on filtering the activity stream, please refer to the Activity Type Filter section.

Note: If you cannot access activity streams, the feature may have been disabled via Admin > System Settings. For more information, refer to the System documentation in the Administration guide.

Activity Type Filter

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

Preview

Once the subpanel view displays the search results, users can easily view the related record's details directly from the record view by clicking the Preview icon to the far right of the record's row. The record's detail will display in the intelligence pane to the right of the record view and provide users with key information regarding the record as well as the related activity stream information. For more information on viewing previews, please refer to the Previews section of the User Interface documentation.

List View Search (Legacy Modules)

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

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

Basic Search

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

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

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

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

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

Advanced Search

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

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

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

your list view. For more information, please refer to the Layout Options section.

- **Saved Searches** : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section.

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

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

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

Fields can be enabled or disabled to allow range searches via Admin > Studio. For more information on how to enable or disable range searches on a field, please refer to the Studio documentation in the Administration guide.

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

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

Layout Options

Sugar gives users the ability to personalize the list view of each module through the advanced search layout options feature. Users can pick which fields are displayed in the list view, the order they are displayed in, and which column the records are ordered by.

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

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

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

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

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

5. In the Order By column dropdown, select a field to order your results by. Only columns in the Display panel will be available to order by and some columns (e.g. Email Address) are not available for sorting.

6. Select a direction you wish to order the fields by: Ascending : 1-10, A-Z; Descending : 10 -1, Z-A

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

7. Click Search to execute the search.

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

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

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

Saved Search

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

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

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

1. Enter any number of search criteria you desire.
2. Enter a descriptive title for the search in the "Save search as" textbox and click "Save".

   Note: Any layout option changes made will also be saved with the saved search.

3. The search is saved and executed. You now have the ability to modify any search criteria or layout options. After any necessary modifications are made click the Update button next to "Modify current search".

   Note: The name of the search you will be updating shows below the Update button.

4. There is no way to modify the name of a saved search. Alternatively, you can execute a saved search, enter a new name into the "Save search as" textbox and click save. This will create a new saved search with the same criteria as the original with the new name. You may then proceed to delete the old saved search.
5. To execute a previously saved search, simply select the desired search from the "Saved Searches" dropdown.

6. This immediately executes the saved search.
7. If you wish to remove a saved search, simply click the Delete button after executing a previously saved search.

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

AND vs OR

When performing searches in the Basic or Advanced search panels, Sugar uses the "and" operator, not "or". This means that if you are searching against multiple fields, Sugar will place an "and" in between each search field returning only records matching all of your search criteria. For example, a search performed for a record name containing "Sales" and the My Favorites checkbox enabled will only return records where the record name contains "sales" and is marked as a favorite.

The only time Sugar will use the "or" operator is when using the mutiselect options in the search criteria. For example, a search performed in the Documents module for the Category field will allow you to select multiple options to search by. Performing a search on the Category field with "Marketing" and "Sales" selected

will return any records where the document's category is defined as "Marketing" or "Sales".

If any other field is added into the search criteria the operators between the Category field and any other field will remain an "and" operator.

Basic Search:

Advanced Search:

Wildcards

Wildcards can be used to search for criteria without including the entire word in the search. Use a wildcard character in place of characters you do not require in your search. You may use any number of wildcard characters in any combination you desire. Search operators can be combined for queries, but if quotation marks and wildcard characters are used together, the quotation marks will supersede the wildcard, resulting in a search for an exact match. The following wildcard characters can be used in the related module filters in Sugar:

Character	Wildcard Use
%	Use this wildcard to match any number of characters, including zero
_	Use this wildcard to match a single character

Please note that a wildcard is implied at the end of all search queries. For example, searching for "Acme" will match account names like Acme Industries or Acme Funds. Insert a wildcard before your search query with a % sign (%Acme) to match account names that begin with or contain the query, such as "ABC Acme Industries". If performing a multiple word search, the wildcard is only appended to

the last word and not all words.

The following are example searches using wildcards in related record search:

Search Criteria	Matches	Does Not Match
rob	**Rob**, **Rob**ert, **Rob**in	Bob, Jacob
%bert	Al**bert**, **Bert**, Ro**bert**	Bart
r_b	**Rob**ert, **Rub**y	Bob, Raab
%s_i	Du**sti**n, Chri**sti**, **Smi**th	Sophie, Josephine
__it	**Nit**a, **Lit**trell	Schmitt
r_b% smit%	**Rob**ert **Smit**h, **RobSmit**e	Bob Smith, Robert Phillip
rob smit	**Rob Smit**h, **Rob Smit**e	John Smith

When performing a search, Sugar will try to match your search text to the beginning of a record's field. Therefore, if an account name starts with an article like "A" or "The", this must be accounted for in the search by adding a wildcard (%) at the beginning of your text. For example, to properly return an account named "The ABC Company", you should enter "%abc" for Sugar to find a match in the system.
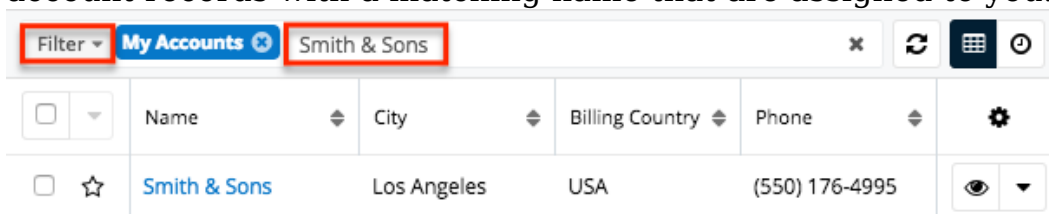
Search Memory

Sugar by default automatically saves your most recent search criteria when leaving the module then repopulates the search fields the next time you return. For example: Perform a search in the Accounts module for "sugar". Navigate away from the Accounts module and then return back to the Accounts module. The search for "sugar" will automatically be shown and the relevant results will be shown below in the list view.

Note: This can be an unintended result if a user is unaware of this functionality. For example, a search may have an assigned user selected that is not currently visible in the scrolling selection box. When running a new search, best practice is to click the Clear button before entering your search criteria.

Search memory can be set to one of the following options:

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

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

Admin Configuration

A Sugar administrator has many options for configuring legacy searches. You have the ability to add, remove, and order fields on either the basic or advanced search layouts through Admin > Studio. For more information on how to change the basic and advanced search layouts, please refer to the [Studio](#) documentation in the Administration guide.

The search results are controlled through the list view layout in Admin > Studio. Here you can also control the possible fields a user can add to their personalized list view. For more information on how to change the list view layout, please refer to the [Studio](#) documentation in the Administration guide.

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Home

Overview

Sugar's Home page houses the dashboard and activity stream which allows users to view pertinent record information via various dashlets and activity stream posts. Every user in Sugar can configure their dashlets based on the display options and filters available from their dashboard. Users can also personalize their activity stream to only view posts specific to records that are important to them. This documentation will go over the basics of the Home page as well as the various options available to customize the Home page to best fit your individual needs.

Home Module Tab

The Home module tab, represented by the Cube icon, is the first tab on the Sugar navigation bar. Click the Cube icon to navigate to Home page or click the triangle next to the cube to perform additional actions. The following options are available in the Home module tab's actions menu:

- **Create Dashboard** : Create a new dashboard and build out its layout and dashlet set. Refer to the [Dashboards and Dashlets](#) documentation for more

information.

- **Activity Stream** : View your activity stream for all enabled modules. Refer to the [Activity Stream](#) section for more information.
- **Manage Dashboards** : Access the Dashboards module to share dashboards, pull dashboards to your Home page, etc. Refer to the [Dashboards and Dashlets](#) documentation for more information.
- **Select Dashboard** : Choose one of the available Home page dashboards to view. Admin-designated default dashboards, shared dashboards you have pulled to your Home page view, and personal dashboards you have created will be displayed. For more information, refer to the [Dashboards and Dashlets](#) documentation.
- **Recent Records** : The three records you most recently viewed, from across all Sugar modules, are displayed at the bottom of the menu. Click a record name to navigate to its record view. Clicking "More recents..." will display a fourth record.

Dashboards

Sugar's Home page allows you to build full-page dashboards by combining dashlets and configuring the dashboard layout to suit your business needs.

Dashboards and dashlets are thoroughly documented in the [Dashboards and Dashlets](#) documentation, which covers dashboards both on the Home page and dashboards on list view and record view intelligence panes. Home page dashboards are unique in that they allow the user to split the board into up to three columns. Refer to the [Changing Home Dashboard Layouts](#) section below for more information.

Sugar Serve users have access to a special Home dashboard called Service Console. For more information on license types and the functionality available for each type, refer to the [User Management](#) documentation.

Instances that are upgraded from Sugar 6.x to Sugar 7.x will have their legacy dashboards migrated over. Users will be able to view these by selecting "My Legacy Dashboard" from the Sugar cube icon. For more information regarding the legacy dashboard, please refer to the [My Legacy Dashboard](#) section.

Changing Home Dashboard Layouts

Users can change the number of columns on their Home dashboards depending on how they wish to view the information. You can organize the dashlets into one, two, or three columns.

The following steps cover changing a dashboard to display two columns as an example:

1. Click the triangle next to the Create button then select "Edit".

2. Select the two column layout icon on the upper left of the dashboard.
   - The second column will open up to the right of the existing column allowing users to add a new dashlet or move an existing one into it. For more information on adding dashlets, please refer to the [Adding Dashlets](#) section of the Dashboards and Dashlets documentation.

3. Click "Save" once the appropriate changes have been made to the dashboard.
4. The dashboard will now display the dashlets across two columns.

Dashlets

Dashlets reside within the dashboard and provides users with valuable information regarding record's for their organization. By default, there are stock dashlets that come out-of-the-box with Sugar and users can easily add them to various dashboards per their viewing preference. Please note that each dashlet can be configured to display the necessary information you wish to view. For more information on configuring the dashlet, please refer to the Editing Dashlets section of the Dashboards and Dashlets documentation.

Commonly Used Dashlets

By default, the "My Dashboard" will display on your Home page and include stock dashlets such as "My Contacts", "Pipeline", etc. Users have the option to add various types of dashlets to each dashboard to view information that is of importance to them. For more information on adding dashlets, please refer to the Adding Dashlets section of the Dashboards and Dashlets documentation.

The commonly-used dashlets are available to use on your Home page:

Dashlet	Description
List View Dashlet	Enables users to view a list of records for a specific module (e.g. Accounts, Contacts, Leads) in Sugar
Planned Activities Dashlet	Provides users with a list of open or upcoming calls and meetings that are assigned to them
Active Tasks Dashlet	Allows users to view outstanding tasks that require attention and need to be completed on a future or current date
History Dashlet	Allows users to view a history of record's related activities (e.g. calls,

	meetings, emails) that have already taken place
[Saved Reports Chart Dashlet](#)	Displays charts from your saved or pre-defined reports and allows users to drill through to view associated records
[My Activity Stream Dashlet](#)	Displays the user's main Activity Stream within a dashboard, eliminating the need to navigate to the Activity Streams view to monitor the most recent stream activities.
[Forecast Pipeline Chart Dashlet](#)	Illustrates the flow of open sales opportunities through the various sales stages by displaying the total dollar amounts for open records grouped by sales stage.

Adding Dashlets to Home Dashboards

Additional dashlets can be added by clicking the triangle next to the Create button on the upper right of the dashboard then selecting "Edit". The dashboards edit layout will display open Add a Row boxes where you can add new dashlets. For each row you add, you will have the option to select the column (+1 column) and add the desired dashlet. You can select and add from the list of available dashlets (e.g. My Accounts) to the specific column on the dashboard row. For more information on adding dashlets to dashboards, please refer to the [Adding Dashlets](#) section of the Dashboards and Dashlets documentation.

Please note that you can add the same dashlet multiple times in the dashboard with different configurations to show different records or information.

My Legacy Dashboard

The users existing dashboard in 6.x will be migrated over to 7.x upon upgrade and can be viewed via the My Legacy Dashboard on the Home page. The My Legacy Dashboard enables users to view information from their existing 6.x dashlets and allows them to similarly configure dashlets (e.g. My Accounts, My Calls, etc.) that are supported for 7.x in the new dashboard (e.g. My Dashboard). The overall layout of the legacy dashboard will be the same as it was in 6.x, but dashlets such as My Activity Stream, My Project Tasks, and any forecast-specific dashlets will not appear as they are not compatible with 7.x. Please note that the My Activity Stream dashlet does not appear upon upgrade as it is replaced with the new activity stream view on the 7.x Home page. For more information on viewing and managing the activity stream, please refer to the [Activity Streams](#) documentation. The legacy dashlets will migrate over with the same configurations applied and will function in similar fashion. For example, you can close meetings from the My Meetings dashlet by clicking the Close icon, click the Pencil icon next to records in the dashlet to edit via the module's record view/detail view, create new calls/meetings in the My Calendar dashlet, etc.

Simply click the triangle next to the Sugar cube icon and select "My Legacy Dashboard" to view and access your 6.x dashboard. Please note that you will not be able to configure (e.g. change layout, add tabs, add dashlets, etc.) the legacy dashboard, but will be able to modify the existing dashlets by clicking the Edit icon at the top of the dashlet menu bar. This will display the pop-up Options box with various options (e.g. Title, Display Rows, etc.) and filters (e.g. Only My Items, Assigned to, etc.) to make any necessary changes. Unlike 6.x, administrators will not be able to configure the Filters options or the dashlet list view display columns via Admin > Studio as the Sugar Dashlet layout in Studio is not available.

Activity Stream

Sugar's activity stream allows users to view a list of activities performed on records, create posts, preview posts, comment on posts, etc. Users can easily track the most recent updates across their entire organization via the record and user

posts on the Home page activity stream. You can also personalize the activity stream by specifying which records' posts you wish to view in the activity stream. Please note that the modules currently enabled to generate record posts for the activity stream are Accounts, Contacts, Leads, Opportunities, Revenue Line Items, Bugs, and Cases. For more information on viewing posts, creating posts, etc. via the activity stream, please refer to the Activity Streams documentation.

Note: If you cannot access activity streams, the feature may have been disabled via Admin > System Settings. For more information, refer to the System documentation in the Administration guide.

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Contacts

Overview

Sugar's Contacts module consists of individual people with whom your organization has an established relationship. Sugar enables you to convert lead records to contact records according to your organization's qualification process. Contact records are typically related to an account record, and multiple contacts may be associated to a single account. Each contact record may then relate to other Sugar records such as meetings, cases, opportunities, and many others, making the contact record a hub for viewing and continuing your interaction with the individual. This documentation will cover information and actions specific to

the Contacts module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting contacts, please refer to the Working With Sugar Modules section of this page.

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

Contact Fields

The Contacts module contains a number of stock fields which come out-of-the-box with Sugar. For information on using and and editing various field types, refer to the User Interface documentation. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration Guide.

Field	Description
Account Name	The account to which the contact belongs
Alternate Address	The contact's alternate address (e.g. billing or shipping)
Assigned To	The Sugar user assigned to the contact
Assistant	The name of the contact's assistant within his or her company
Assistant Phone	The assistant's phone number
Birthdate	The contact's date of birth
Business Center Name	The business center this contact belongs to **Note**: This field is only available to Sugar Serve and Sugar Sell users. In Sugar Sell, contacts created during lead conversion inherit the lead's business center, which is then used for SugarBPM business hour calculations. For more information, refer to the Stock SugarBPM Templates documentation.
Comment Log	A shared log of messages, comments, or

	other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the [User Interface](#) documentation for more details.
Confirm Portal Password	When editing, confirmation of the contact's password for accessing Sugar Portal
Contact Source	A system-level dropdown field that represents the origin of newly created contacts. It is set to External on contacts created via Portal and set to Internal on contacts created in Sugar. This field is not available in Studio or the user interface and is only available in [SugarBPM](#).
D&B Principal ID	Unique ID number associated with the contact in D&B
Date Created	The date the contact record was created
Date Modified	The date the contact record was last modified
Department	The contact's department within his or her company
Description	A description or other information about the contact
Do Not Call	Indication that the contact should not be called
Email Address	The contact's email address
Facebook Account	The contact's Facebook account information
Fax	The contact's fax number
First Name	The contact's first name
Google Plus ID	The contact's Google Plus ID
Home	The contact's residence number
Last Name	The contact's last name
Lead Source	The source from which the contact originated

	Note: The Lead Source field will be set to "Support Portal User Registration" for contacts created via portal registration.
Mobile	The contact's mobile number
Name	When viewing, the contact's full name
Office Phone	The contact's office number
Other Phone	The contact's alternate phone number
Picture	An image of the contact (e.g. business card or profile picture)
Portal Active	Indication that the contact is enabled to access Sugar Portal
Portal Application	The portal application name. Only used when integrating a custom portal solution with Sugar.
Portal Name	The contact's user name for accessing Sugar Portal
Portal Password	The contact's password for accessing Sugar Portal
Portal User Company Name	The name of the company to which the customer belongs to **Note**: This field will display the company name the customer enters when signing up for the [Sugar Portal]().
Preferred Language	The contact's preferred language when accessing Sugar Portal
Primary Address	The contact's primary address
Reports To	The contact's manager in his or her company
Salutation	Standard greeting for the contact (e.g. Mr., Ms., Mrs., etc.)
Sync to mail client	Indication that the contact should be synced to mail client when using the Sugar Plug-in for Outlook, for example. **Note**: This field must be set on a per-user basis.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating

	and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the contact record
Title	The contact's title within his or her company
Twitter Account	The contact's Twitter account information

Working With Sugar Modules

While the Contacts module has some features that only apply to contacts, it also uses the Sidecar user interface that most Sugar modules are based on. In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to contacts.

General Instructions for Working With Sugar Modules	Contacts-Specific Instructions
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Contacts-specific help exists for each topic, use the links below to navigate to sections of the current page.
Creating Records	Contact Creation via Sugar Portal Creating Contacts via vCard
Viewing Records	
Searching for Records	
List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	
Editing Records	
Deleting Records	
Emailing Records	Emails and Contacts
Exporting Records	Downloading a Contact's vCard
Recalculating Calculated Values	
Finding Duplicate Records	
Merging Records	

[Viewing Record Historical Summaries](#)	
[Viewing Record Audit Logs](#)	
[Record PDFs](#)	
[Favoriting Records](#)	
[Following Records](#)	
[Sharing Records](#)	

Contact Menus

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

Module Tab Menus

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

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

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

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

- The Contacts module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Contacts module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.

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

List View Menus

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

List View Mass Actions Menu

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

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

Menu Item	Description
Email	Email one or more contacts at a time
Mass Update	Mass update one or more contacts at a time
Merge	Merge two or more duplicate contacts
Delete	Delete one or more contacts at a time

Export	Export one or more contacts to a CSV file
Recalculate Values	(Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio

List View Record Actions Menu

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

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

Menu Item	Description
Preview (Eye icon)	Preview this contact in the intelligence pane
Edit	Edit this contact
Follow	Follow this contact
Delete	Delete this contact

Record View Actions Menu

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

The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this contact
Share	Share a link to this contact via email
Download PDF	Download contact information as a PDF file
Email PDF	Email contact information as a PDF attachment
Manage Subscriptions	Manage this contact's newsletter campaign subscriptions
Download vCard	Download a vCard from Sugar and transfer this contact's information to another application (e.g. Outlook)
Find Duplicates	Locate potential duplicates of this contact
Copy	Duplicate this contact to create a new contact
Historical Summary	View a historical summary of activities (e.g. calls, meetings, etc.) related to this contact

View Audit Log	View a record of changes to this contact
View Personal Info	Display this record's fields which an admin has designated as personal information
Delete	Delete this contact

Contact Creation via Sugar Portal

The Sugar Portal allows your customers to file bugs, cases, and review knowledge base articles created in Sugar. Please note that customers have to be registered users of the portal in order to be able to access the portal. When a potential portal user visits the portal login page and completes the registration form, their information is entered into Sugar as a new contact record with the Lead Source field set to "Support Portal User Registration". Once the contact record is validated and approved for portal access, you can enable the Portal Active checkbox to activate their portal account. For more information on managing the Sugar portal, please refer to the Portal Deployment User Guide.

Emails and Contacts

Contacts include an email address which can be used to email the contact as a recipient. The methods for doing so are covered in the Emailing Records section of the User Interface documentation. In addition to being a recipient or sender of an email, contacts may be related to emails by being selected in the email's Related To field. These relationships allow the contact to display all relevant email correspondence in the Emails subpanel and History dashlet on a contact's record view.

Emails Subpanel

The Emails subpanel in the Contacts module displays emails which are associated with the contact record in a variety of ways:

- **Explicitly related to the contact** : If the contact is selected in the email's Related To field, the email and contact are explicitly related, and the email will appear in the contact's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the [Emails](#) documentation.
- **Implicitly related to the contact** : If one of the contact's email addresses appears in the email's From, To, or Cc fields, the email and contact are implicitly related, and the email will appear in the contact's Emails subpanel and History dashlet. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email contacts or email archiving.

The Emails subpanel allows the following functions to be performed:

- **Email Details** : To view the details of an email, click the subject to open it in detail view.
- **Record Count** : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- **Collapse or Expand** : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
  - **Note**: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration Guide.
- **Column Widths** : Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- **Column Sort** : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).
- **Compose a New Email** : Click the Plus button on the upper right of a subpanel to create a new email with, by default, both an implicit and explicit relationship to the contact you are currently viewing. The email will automatically select the contact in the Related To field as well as add the contact's primary email address as a recipient in the To field.

- **Note**: To send email from Sugar, users must configure their outbound email server via [Emails > Email Settings](#) or, if using the system email account to send email, the system's outbound email server must be configured by an administrator in [Admin > System Email Settings](#).
- **Note**: Because creating a new related record opens a drawer on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- **More Records** : By default, Sugar displays up to five records in each subpanel, though administrators can alter the number via Admin > System Settings as described in the [System](#) documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g. "More Emails...") at the bottom of the subpanel to load the next set of records.

Calls, Meetings, and Contacts

Contacts can be related to calls and meetings in two ways. First, they can be selected in the event's Related To field, indicating that the contact was the topic of the call or meeting. Second, they can be included as invitees to the call or meeting.

Calls and Meetings Subpanels

Each contact's record view includes a Calls subpanel and a Meetings subpanel. These subpanels display all calls and meetings which include the contact as an

attendee. If the contact is not an attendee but is selected in the call's or meeting's Related To field, the call or meeting will not appear in the subpanels.

When relating an existing call or meeting to a contact via the subpanels on a contact's record view, the contact will automatically be added as an invitee. When creating a call or meeting from the subpanels, the contact will automatically be added as an attendee and the contact's account will automatically be set in the event's Related To field.

vCards and Contacts

vCards are electronic business cards that are exchanged between applications such as email and web browsers. Contacts may be [created from vCards](#) generated by another application or [saved as vCards](#) for use in other software.

Creating Contacts via vCard

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

1. Click the triangle in the Contacts module tab and select "Create Contact From vCard".

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

Downloading a Contact's vCard

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

1. Navigate to a Contacts record view.
2. Select "Download vCard" from the Actions menu to download the vCard

file.

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

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Accounts

Overview

Sugar's Accounts module consists of companies with whom your organization has a relationship. It is generally seen as the hub for managing and analyzing your business' interactions with each company. Each account record may then relate to other Sugar records such as contacts, meetings, cases, opportunities, and many others as your relationship with the customer matures. This documentation will

cover information and actions specific to the Accounts module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting accounts, please refer to the Working With Sugar Modules section of this page.

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

Account Fields

The Accounts module contains a number of stock fields which come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration Guide.

Field	Description
Alternate Phone	The account's alternate phone
Annual Revenue	The company's annual revenue
Assigned To	The Sugar user assigned to the account
Billing Address	The account's billing address
Business Center Name	The business center responsible for managing this account. This field is only available to Sugar Serve and Sugar Sell users. In Sugar Serve, new cases inherit their account's business center which is then used for SugarBPM business hour calculations. For more information, refer to the Business Centers and Accounts section of this page. In Sugar Sell, leads' business centers are used for SugarBPM business hour calculations during lead routing. For more information, refer to the Stock

	[SugarBPM Templates](#) documentation.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the [User Interface](#) documentation for more details.
Copy Address From Left	Select the box to copy the account's billing address to the shipping address field
Date Created	The date the account record was created
Date Modified	The date the account record was last modified
Description	A description or other information about the account
DUNS	Unique 9-digit number associated to the company in D&B
Email Address	The account's email address
Employees	The number of employees at the company
Facebook Account	The account's Facebook account information
Fax	The account's fax number
Google Plus ID	The account's Google Plus ID
Industry	The industry type to which the company belongs
Name	When viewing, the account's name
Office Phone	The account's office number
Ownership	Indicate if the company is privately or publicly owned
Member Of	Designate a parent-child relationship between the account and another account in Sugar
Rating	The rating for the company compared to other companies in Sugar

Service Level	The contractual level of service (e.g. Tier 1, Tier 2) for the account which, for Sugar Serve, is used by the [stock SugarBPM template](#) to calculate case follow-up dates
Shipping Address	The account's shipping address
SIC Code	The Standard Industrial Classification (SIC) code for the account
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating and using tags, please refer to the [Tags](#) documentation.
Teams	The Sugar team(s) assigned to the account record
Ticker Symbol	The stock trading symbol for the company
Twitter Account	The account's Twitter account information
Type	The account type (e.g. customer, investor, etc.)
Website	The website URL associated with the account

Working With Sugar Modules

While the Accounts module has some features that only apply to accounts, it also uses the Sidecar user interface that most Sugar modules are based on. In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to accounts.

General Instructions for Working With Sugar Modules	Accounts-Specific Instructions
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Accounts-specific help exists for each topic, use the links below to navigate to sections of the current page.
[Creating Records](#)	

[Viewing Records](#)	
[Searching for Records](#)	
[List View](#)	[List View Mass Actions Menu](#) [List View Record Actions Menu](#)
[Record View](#)	[Record View Actions Menu](#)
[Intelligence Pane](#)	
[Editing Records](#)	
[Deleting Records](#)	
[Emailing Records](#)	[Emails and Accounts](#)
[Exporting Records](#)	
[Recalculating Calculated Values](#)	
[Finding Duplicate Records](#)	
[Merging Records](#)	
[Viewing Record Historical Summaries](#)	
[Viewing Record Audit Logs](#)	
[Record PDFs](#)	
[Favoriting Records](#)	
[Following Records](#)	
[Sharing Records](#)	

Account Menus

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

Module Tab Menus

The Accounts module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Accounts list view. You may also click the triangle in the Accounts tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important operations within the module. The [Recently Viewed menu](#) displays the list of accounts you most recently viewed. The [Favorites menu](#) displays the list of accounts you most

recently marked as favorites.

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

Menu Item	Description
Create Account	Opens the record view layout to create a new account
View Accounts	Opens the list view layout to search and display accounts
View Account Reports	Displays existing reports based on the Accounts module
Import Accounts	Opens the import wizard to create or update accounts using external data

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

- The Accounts module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Accounts module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Accounts module for your entire Sugar instance. Reach out to your Sugar administrator to have the Accounts module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration Guide.

List View Menus

The Accounts [list view](#) displays all account records and allows for searching and filtering to locate specific accounts. You can view the basic details of each record within the field columns of the list view or click an account's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

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

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

Menu Item	Description
[Email](#)	Email one or more accounts at a time
[Mass Update](#)	Mass update one or more accounts at a time
[Merge](#)	Merge two or more duplicate accounts
[Delete](#)	Delete one or more accounts at a time
[Export](#)	Export one or more accounts to a CSV file
[Recalculate Values](#)	(Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio

List View Record Actions Menu

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

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

Menu Item	Description
Preview (Eye icon)	Preview this account in the intelligence pane
Edit	Edit this account
Follow	Follow this account
Delete	Delete this account

Record View Actions Menu

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

The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this account
Share	Share a link to this account via email
Download PDF	Download account information as a PDF file
Email PDF	Email account information as a PDF attachment
Find Duplicates	Locate potential duplicates of this account
Copy	Duplicate this account to create a new account
Historical Summary	View a historical summary of activities (e.g. calls, meetings, etc.) related to this account
View Audit Log	View a record of changes to this account
View Personal Info	Display this record's fields which an admin has designated as personal information
Delete	Delete this account

Business Centers and Accounts

Business centers, available exclusively to Sugar Serve and Sugar Sell users, represent your company's centers of operation and specify a time zone, operating hours, and holidays so that a concept called "Business Hours" can be leveraged in SugarBPM. Each account's selected business center can be used for SugarBPM business hour calculations.

Sugar Serve's stock SugarBPM template uses each case's business center which is inherited from the case's account at the point of creation. For more information, refer to the [Cases](#) docmentation. If your organization does not wish to specify various business centers on accounts and cases, the stock templates can be modified to use a static business center. Refer to the [Getting Started With SugarBPM for Sugar Serve](#) and [Stock SugarBPM - Case Follow-Up Date Management](#) articles for help configuring the stock template and your instance to work together.

Sugar Sell's stock lead routing SugarBPM template uses each account's business center for task due date calculations using business hours. For more information, refer to the [Stock SugarBPM Templates](#) documentation.

Once business centers have been set up by an admin or [Business Center Administrator](#), Sugar Serve and Sugar Sell users can simply select the appropriate business center in the Business Center Name field on the account record. For more information on creating and configuring business centers, refer to the [Business Center Management](#) documentation.

Emails and Accounts

Accounts include an email address which can be used to email the account as a recipient. The methods for doing so are covered in the [Emailing Records](#) section of the User Interface documentation. In addition to being a recipient or sender of an email, accounts may be related to emails by being selected in the email's Related To field. These relationships allow the account to display all relevant email correspondence in the [Emails subpanel](#) and [History dashlet](#) on an account's record view. An account's Emails subpanel and History dashlet may also display emails belonging to the contacts related to the account.

Emails Subpanel

The Emails subpanel in the Accounts module displays emails which are associated

with the account record in a variety of ways:

- **Explicitly related to the account** : If the account is selected in the email's Related To field, the email and account are explicitly related, and the email will appear in the account's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the [Emails](#) documentation.
- **Implicitly related to the account** : If one of the account's email addresses appears in the email's From, To, or Cc fields, the email and account are implicitly related, and the email will appear in the account's Emails subpanel and History dashlet. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email accounts or email archiving.
- **Related to the account's related contacts** : If the email is related, either explicitly or implicitly, to a contact record which belongs to the account, the email will appear in the account's Emails subpanel and History dashlet.
    - **Note**: Administrators can enable or disable an account from displaying related contact emails via Admin > Related Contacts Emails. For more information, please refer to the [Emails](#) documentation in the Administration guide.

The Emails subpanel allows the following functions to be performed:

- **Email Details** : To view the details of an email, click the subject to open it in detail view.
- **Record Count** : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- **Collapse or Expand** : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
    - **Note**: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration Guide.
- **Column Widths** : Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- **Column Sort** : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).
- **Compose a New Email** : Click the Plus button on the upper right of a subpanel to create a new email with, by default, both an implicit and

explicit relationship to the account you are currently viewing. The email will automatically select the account in the Related To field as well as add the account's primary email address as a recipient in the To field.

- **Note**: Because creating a new related record opens a drawer on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.

- **More Records** : By default, Sugar displays up to five records in each subpanel, though administrators can alter the number via Admin > System Settings as described in the [System](#) documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g. "More Emails...") at the bottom of the subpanel to load the next set of records.

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Documents

Overview

Sugar's Documents module gives your users a way to access and update company-specific files. These files can range from internal policies to customer-distributed content. There are various ways you can create documents in Sugar such as via the Documents module and via the quick create menu. Once the document record is created, you can view and edit information pertaining to the document via the

Documents detail view. Each document record may then relate to other Sugar records such as accounts, cases, opportunities, and many others. This documentation will cover how to use the Documents module as well as the various actions and options available from within the module.

Document Fields

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

Field	Description
Assigned To	The Sugar user assigned to the document
Category	Primary category for locating documents
Description	A description or other information about the document
Document Name	The name or designation of the Document (Defaults to the filename of the Document)
Document Type	The type of the Document (e.g. NDA, Mail Merge, License Agreement, etc.)
Expiration Date	The date the Document expires
File Name	Click "Choose File" to navigate to the location to upload a Document
Publish Date	The date the Document is published (Defaults to today)
Related Document	A Document record that is related to this Document
Related Document Revision	The Related Document's current revision
Revision	The most recent revision number for the Document **Note**: The Revision field becomes read-only after the initial save.
Source	Where the Document is stored (i.e

	Sugar, Google, IBM SmartCloud, etc.)
Status	The current status of the document (e.g. Active, Draft, Expired, etc.)
Sub Category	Secondary category for locating documents
Teams	The Sugar team(s) assigned to the document record
Template	Classifies a Document as a template or not

Documents Module Tab

The Documents module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Documents" to access the list view. Once the Documents tab displays on the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed Menu displays the list of documents you last viewed in the module. The Favorites Menu displays the list of documents you most recently marked as favorites in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Document	Opens the edit view layout to create a new document
View Documents	Opens the list view layout to search and display documents

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

- The Documents module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Documents module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the [Layout Options](#) section of the Getting Started documentation.

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

Creating Documents

There are various methods for creating documents in Sugar including via the Documents module, quick create, and via duplication. The full edit view layout opens when creating the document directly from the Documents menu and includes all of the relevant fields for your organization's documents. The Edit View layout can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Creating Via Documents Module

You can create a library of documents and graphics that you can share with other users and contacts, ranging from marketing collateral to contracts. You can also create templates for frequently used documents. One of the most common methods of document creation is via the Create Document option in the Documents module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the document.

Use the following steps to create a document via the Documents module:

1. Click the triangle in the Documents module tab to open the actions menu and select "Create Document".
2. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to

saving.

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

Creating Via Google Docs

Sugar has the ability to create documents in the system that are linked to external sources, the most popular of these is Google Docs or Google Drive.

Use the following steps to create a document linked to Google Docs via the Documents module:

1. Click the triangle in the Documents module tab to open the actions menu and select "Create Document".
2. Select "Google Docs" from the Source dropdown to reveal the External Source selector.

   Note: If Google Docs is not an option in the Source dropdown, then you most likely need to connect your Sugar account to your Google Id through your user profile. For more information on how to connect to your Google Id in Sugar, please refer to the Google Docs Integration section in this documentation.
3. Click "Choose File" to navigate to a file on your local computer. The selected file will be uploaded to Google Docs. Not all file extensions are currently supported for uploading to Google Docs.
   The following file extensions are currently allowed:

File	Description
CSV	Comma Separated Values
DOC	Microsoft Word 97-2004
DOCX	Microsoft Word
HTML	Web Text File

HTM	Web Text File
JPG	Image File
ODS	OpenDocument Spreadsheet
ODT	OpenDocument Text
PDF	Portable Document Format
PNG	Image File
PPT	Microsoft PowerPoint Presentation
PPS	Microsoft PowerPoint Slideshow
RTF	Rich Text Format
SXW	OpenOffice.org XML
TAB	Tab Separated Values
TXT	Plain Text
TEXT	Plain Text
TSV	Tab Separated Values
XLS	Microsoft Excel 97-2004 Workbook
XLSX	Microsoft Excel Workbook

4. Alternatively, click "File on External Source" to reveal the external source selector.

5. Click the arrow button to launch the selector. This window will show the 20 most recently modified documents in your Google Drive.
   Note: This will only show documents owned by you in your Google Drive, and will show documents from all folders in your drive.
6. Use the Search box to find a specific document. Select a document by clicking on the document's file name.

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

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

Note: Documents that link to an external account (e.g. Google Docs, IBM Smart Cloud) cannot be used as attachments in emails composed through the Sugar Email Client.

Creating Via Quick Create

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

Use the following steps to create a document via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Document". You can also click the Plus button on any Documents subpanel on a related module's record view (for Sidecar modules) or select "Create" on any Documents subpanel on a related module's detail view (for Legacy modules).
   From Quick Create menu:

From Documents subpanel (for Sidecar modules):

From Documents subpanel (for Legacy modules):

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

Creating Via Duplication

You can also create a new document by duplicating an existing document record. The Copy option is useful if the document you are creating has similar information to an existing document. Related records on the original document will not be related to the newly created document, but the last revision of the original document will copy over to the new document with the change log contents: "Document Created".

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

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

   Agreement ☆

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

   Note: The Source and File Name fields can not be modified when duplicating a document.

Viewing Documents

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

Viewing Via List View

The Documents list view displays all document records meeting the current search

criteria. To access the list view, simply click the documents module tab. While list view shows key document fields, you can click the document's name to open the record in detail view. For more information on viewing documents via list view, please refer to the Documents List View section of this documentation.

Viewing Via Detail View

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

Viewing Via Recently Viewed

As you work, Sugar will keep track of which documents you have recently viewed. Click the Actions menu in the Documents module tab to see a list of your most recently viewed documents, and click each name to open the document in detail view.

Viewing Via Dashlets

Sugar Dashlets allow users to get a quick view of various records, activities, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane for Sidecar modules (e.g. Accounts, Contacts, etc.).You can view document information in document-based dashlets such as "My Documents". Clicking a document's name from any dashlet will open the document in detail view. For more information on using dashlets and viewing document records via dashlets, please refer to the Dashboards and Dashlets documentation.

Viewing Via Reports

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

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

Searching Documents

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

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

Basic Search

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

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

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

Search Documents

| Document Name | | My Favorites ☐ | Search | Clear | **Advanced Search** |

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

documentation in the Administration guide.

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

Advanced Search

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

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

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

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter a document name to search, Sugar will only return document records with a matching name that you have marked as favorites. When searching

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

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

Global Search

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

To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword. For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation. Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

Documents List View

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

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

Pagination

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

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

Checkbox Selection

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

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

Mass Actions Menu

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

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

Menu Item	Description
Delete	Delete one or more documents at a time
Mass Update	Mass update one or more documents at a time
Export	Export one or more documents to a CSV file

Favorite Designation

Users have the option to mark document records as favorites via the list view as

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

Column Sorting

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

Documents Detail View

The Documents detail view displays thorough document information including all document fields which are grouped by default into the Overview and Revision Details panels. You can also view a document's related records (Document Revisions, Related Contracts, Accounts, etc.) which appear in subpanels beneath the document fields. The detail view can be reached by clicking a document record's link from anywhere in the application including from the Documents list view.

Please note that you will only be able to view a document record according to your team membership, user type, and role restrictions. For more information on teams

and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide. Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Actions Menu

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

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

Menu Item	Description
[Edit](#)	Edit this document
[Copy](#)	Duplicate this document
[Delete](#)	Delete this document

Favorite Designation

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

Agreement

Edit ▾

⌃ **Overview**

File Name: Agreement.docx

Next or Previous Record

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

Terms ☆

Edit ▾

◁ (2 of 4) ▷

⌃ **Overview**

Subpanels

Beneath a document record's fields are subpanels containing related records from various modules as well as the document revision history.

Related Records Subpanels

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

Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the

layout via Admin > Studio to provide visibility to the most important fields. For more information modifying subpanels, please refer to the Studio documentation in the Administration guide.

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

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

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

Document Revisions Subpanel

The Document Revisions subpanel lists the document revisions for this document record. The revisions are sorted in descending order on the revision number by default. Each revision retains the copy of the document loaded on that revision.

This provides you with the ability to look back at the history of the document to compare revisions.

Note: This does not work as expected with External Documents (e.g. Google Docs, IBM Smart Cloud) as the document is not stored in Sugar for these document sources, but only a link to the document. To retain change history, either utilize Google Doc's change features, or select a different document for every revision.

You can click the Create button on this subpanel to create a new revision of the document you are currently viewing. The revision number is automatically populated with the current highest revision number plus one, but can be modified. However, once the new Document is saved, this field becomes read-only for all users.

Note: If you skip numbers, it will not go back and fill in the missing numbers.

You may also populate the Change Log field with a short description of the change being made for this revision. Click "Save" to complete the revision record.

Editing Documents

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

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

Administrators in Sugar may configure the Documents edit view via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

Editing Via Detail View

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

Editing Via List View

You can edit documents via the [List View](#) by clicking the Pencil icon to the left of each document's name. The edit view layout will open and you can update the necessary fields, then click "Save" to preserve the changes.

Deleting Documents

If a document record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Documents detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. Deleting document records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records. Document revision records will be deleted when deleting the parent document record. Please note that your ability to delete documents in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Deleting Via Detail View

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

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

   Agreement ☆

   Edit ▾
   Copy
   Delete iew
   File Name: Agreement.docx

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

Deleting Via List View

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

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

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

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

Exporting Documents

Sugar's Export option allows users to download all fields for the selected documents to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use document data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of document records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

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

Downloading Documents

Exporting a document from Sugar will only export the document record with the metadata about the document, but the document itself will not be included in the export. In order to download a document from the documents module, simply click on the File Name link in the list view or the detail view and the document will be downloaded to your computer. If the document is linked to an external source (e.g. Google Docs, IBM Smart Cloud), then the file name link will open directly to the doc inside a new window or tab.

From Documents list view:

From Documents detail view:

Mass Updating Documents

Mass Updating allows users to make the same change to multiple document records at once from the Documents list view. Users with administrator or developer level access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information on configuring mass update, please refer to the Studio

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

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

1. Navigate to the Documents list view by clicking the Documents module tab.
2. Use the list view's Basic or Advanced Search to identify documents you wish to modify.
3. Select the desired documents individually or using the checkbox dropdown's options.
4. Choose "Mass Update" from the Actions menu.

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

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

Favoriting Documents

Each Sugar user has the option to designate their own favorite documents which are important or will be viewed often so that they can easily be accessed via search or from the documents module tab. Once records are marked as favorites, use the My Favorites checkbox in the Documents Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the Documents Module Tab.

Favoriting Via List View

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

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

Favoriting Via Detail View

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

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

Favoriting Via Subpanel

Use the following steps to mark document records as favorites via the subpanel in related modules:

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

3. To remove the document as a favorite, click the star again to revert it to gray.

Google Docs Integration

Sugar comes with Google Docs (Google Drive) integration by default. In order to be able to create a document in Sugar from a Google Doc in your Google Drive you will first need to link your Google Account with your profile in sugar. For more information regarding setting up external accounts in your user profile, please refer to the External Accounts Tab section in the Getting Started documentation.

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Calendar

Overview

Sugar's Calendar module allows users to easily schedule, view, and manage their activities (e.g. calls, meetings, tasks) in one place. The calendar will show your calls, meetings, and tasks provided you are an invitee on the call or meeting, or the task is assigned to you. You can also view other user's scheduled activities via the shared calendar option. This documentation will cover how to use the Calendar module as well as the various actions and options available from within the module.

Calendar Module Tab

The Calendar module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Calendar" to access your calendar. Once the Calendar Lists tab displays on the navigation bar, you can click the triangle within the tab to display the Actions menu, which allows you to perform important actions within the module.

The Actions menu allows you to perform the following options:

Menu Item	Description
Schedule Meeting	Schedule a new meeting via the Meetings record view
Schedule Call	Schedule a new call via the Calls record view
Create Task	Create a new task via the Tasks record view
Today	View the current day on the calendar

Calendar Actions

When viewing your calendar, there are several options across the top of the

calendar to help you navigate the calendar and increase the functionality available. These buttons are accessible from any calendar screen, with some notable exceptions. Most of the buttons are used to change the view of the calendar to show a specific time period or jump to a specific period.

The buttons are defined as follows:

Options	Description
Day	View the current day on the calendar
Week	View the current week on the calendar
Month	View the current month on the calendar
Year	View the current year on the calendar
Shared	View the shared calendar for other users in Sugar
User List	Select which users will show on the shared calendar **Note**: This option is only available when viewing the Shared calendar
Calendar Icon	Click the calendar icon to quickly jump to a specific date **Note**: This option is not available when using the year view
Settings	Change the settings on the calendar as described in Viewing via Calendar

Creating Activities

There are various methods for creating the different activities available in Sugar, including via the calendar itself, the Calendar module's actions menu, the individual activity's module, or via quick create. The record view opens in edit mode when creating the call directly from the Calls menu, Quick Create menu, and Calendar module and includes all of the relevant fields for your organization. When using quick create to make a call while viewing an existing record of another module, Sugar automatically creates a relationship between both records. For example, if you are viewing a contact record (e.g. John Smith) and create a new call via its record view, the Related To field in the call record will automatically populate with "John Smith", thus creating the relationship and adding him as an invitee. The record view layout can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

Creating via Calendar Grid

The calendar allows you to create meetings and calls easily by clicking on the cell corresponding to the specific date and time you wish to schedule the activity. The record view will appear in edit mode, and the start date and time will automatically be populated based on the date and time cell you selected in the calendar.

Use the following steps to create an activity (e.g. meeting) via the calendar grid:

1. Click the Calendar module tab.
2. On the calendar view, click the cell corresponding to the date and time you wish to schedule the meeting. You can choose to view the calendar by Day, Week, Month, Year, or Shared. For more information on viewing the shared calendar, please refer to the Viewing Shared Calendar section of this documentation.

   When a cell is selected on the calendar, a Meeting record view will appear in edit mode. A popup will also appear giving users to option to create a new call or a new task instead.

3. Refer to step 2 and beyond in Creating via Meetings Module section of the Meetings documentation for additional instructions about creating meeting records.

Creating via Actions Menu

Activities can also be created via the create options (e.g. Schedule Meeting, Schedule Call, etc.) in the Calendar module tab. This opens up the record view in edit mode for the corresponding module (e.g. Calls, Meetings, etc.) which allows you to enter all the relevant information for the activity.

The following steps cover creating a new meeting via the Calendar module tab as

an example:

1. Click the triangle in the Calendar module tab to open the actions menu and select "Schedule Meeting".

2. Refer to step 2 and beyond in Creating via Meetings Module section of the Meetings documentation for additional instructions about creating meeting records.

Creating via Activities Modules

Calls, meetings, and tasks can also be created directly from their individual modules. The activity will then show on your calendar if you are listed as an invitee on the call or meeting or if you are the assigned user on the task. For instructions for creating activities directly from their modules, please refer to the Calls, Meetings, or Tasks documentation.

Creating via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick-create button on the upper right of all Sugar pages to access the menu. You can also quick-create an activity from any Activities subpanel (Legacy modules), Planned Activities dashlet (Sidecar modules), as well as Calls, Meetings, or Tasks subpanels (Sidecar modules) on related module records.

Note: As a best practice, if you are going to be relating the activity to any other record in Sugar, create the activity from the related record's record view, which will automatically relate the two records.

Use the following steps to create a call via the quick-create menu as an example:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Log Call". You can also quick-create calls using the following methods:

From Activities subpanel (legacy modules only):

From Calls subpanel:

From Planned Activities dashlet:

2. Refer to step 2 and beyond in Creating via Meetings Module section of the Meetings documentation for additional instructions about creating meeting records.

Adding Reminders

Sugar includes the ability to remind invitees when they have a call or meeting that is scheduled to begin in a given amount of time. Reminders can be sent via email to all of the invitees prior to the call or meeting's scheduled start date and time. By default, reminders have to be manually added to calls and meetings upon creating or editing the activity. Users can configure their default reminders via their User Preferences, which will automatically select the default reminder time in the Reminders field.

For more information on adding reminders, please refer to the Calls and Meetings documentation.

Adding Invitees

Users have the option of adding additional invitees (e.g. Contacts, Leads, Users) to calls and meetings via the Add Invitees or Create an Invitee option in the Calls or Meetings module's edit or quick-create view. Please note that the user creating the call or meeting as well as the contact or lead selected in the Related To field will automatically be added as invitees to the call or meeting. You can simply remove yourself or an attendee from the call by choosing the remove button on the Scheduling panel or "Unlink" from the Invitees panel.

Adding via Add Invitees

Users have the option to add invitees to the Guests panel directly from the meeting or call record view.

Please refer to the steps in the Adding via the Guests Panel section of the Meetings documentation for instructions on how to add invitees to meeting records.

Adding via Create an Invitee

Users have the option to create invitees and add them to the Guests panel directly from the meeting or call record view. Please refer to the steps in the Adding via Create a Guest section of the Meetings documentation for instructions on how to add invitees to meeting records.

Setting Meetings and Calls to Recur

Meetings and calls can be set as recurring events so that users do not have to create individual meeting or call records for regularly occurring events. Recurrences can be set up to occur daily, weekly, monthly, or yearly.

When a recurring meeting or call is configured, individual meeting records are created in Sugar, so when viewing the Meetings or Calls list view, all recurrences will show. For more information on viewing records via the list view, please refer to the List View section of the User Interface documentation.

For more information on setting up, editing, and deleting recurring records, please refer to the Calls and Meetings documentation.

Viewing via Calendar

The Calendar module allows users to schedule, view, and manage various activities (Calls, Meetings, Tasks) in Sugar. The Calendar module can be accessed by clicking the Calendar module tab.

The three activity types are color-coded on the calendar as follows:

Module	Color
Calls	Red
Meetings	Blue
Task	Green

You can click the cell of an existing call or meeting to view the details via the Quick Create form. You can also click the "i" icon to the far right of the call record cell for a quick view of additional details (e.g. Subject, Start Date & Time, Duration, Related to, etc.) of any activity without opening up the record.

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

The Calendar module defaults to the week view and can be viewed as a day, week, month, or year view using the buttons at the top of the page. The week view can also be changed to have a different day of the week using the Calendar Options in your user profile. Simply navigate to the Advanced tab of your user profile then scroll to the Calendar Options panel and select the appropriate "First Day of Week" (e.g. Sunday, Monday, etc.). For more information regarding configuring the first day of the week, please refer to the Getting Started documentation.

When viewing the day, week, or month view of the calendar, you can jump to a specific date using the calendar pop-up in the top right of the screen. Select any date within the same month or use the left or right arrows to navigate to previous or upcoming months. You can also jump to today's date with the Today button in the pop-up calendar, or jump to a specific month or year by clicking on the displayed month in the pop-up calendar. Alternately, you can jump to the next day, week, month, or year, depending on your current view, using the Next and Previous buttons at the top and bottom of the calendar view. For more information on using the next and previous buttons, please review the [Next or Previous Calendar View](#) section of this documentation.

The look and feel of the calendar can also be changed via the Settings option to the right of the calendar pop-up.

The Calendar settings allow you to perform the following actions:

- **Display time slots in Day and Week views** : When this option is enabled, activities are displayed in their specified time cells when viewing a day or week via the calendar. If this option is disabled, all activities will appear as a list. This option is enabled by default.
- **Start Time** : The value set in this field represents the first time cell displayed on your day or week calendar view (e.g. 09:00 am).
  - **Note**: This option is disabled and hidden if "Display time slots in Day and Week views" is disabled.
- **End Time** : The value set in this field represents the last time cell displayed on your day or week calendar view (e.g. 05:00 pm).
  - **Note**: This option is disabled and hidden if "Display time slots in Day and Week views" is disabled.
- **Show Calls** : When this option is set to "Yes", scheduled calls are also displayed in the calendar view. If you do not wish to see calls in the calendar view, set this option to "No". This option is set to "Yes" by default.
- **Show Tasks** : When this option is set to "Yes", scheduled tasks are also displayed in the calendar view. If you do not wish to see tasks in the calendar view, set this option to "No". This option is set to "Yes" by default.

Once all settings have been set, click "Apply" to update the calendar with your changes.

The calendar can also be viewed via the My Legacy dashboard on the Home page. Please note that the My Calendar dashlet is not available to view or add on the Home page for 7.x. The My Legacy dashboard enables you to view information from your existing 6.7.x dashlets such as My Calendar dashlet. Once your 6.7.x instance is upgraded to 7.x, simply navigate to the My Legacy Dashboard on the Home page to view all existing activities on the My Calendar dashlet. For more information regarding the My Legacy dashboard, please refer to the Home documentation.

Viewing Shared Calendar

The Calendar module allows you to view not just your own activities, but you can also view the calendar of other Sugar users using the Shared Calendar. The

calendar will show the selected user in a weekly view on one page. Using the shared calendar, users will also have the option to create activities for other users directly from the calendar. For more information on using the shared calendar, please refer to the Shared Calendar section of this documentation.

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

Moving Scheduled Activities

The Sugar calendar allows for the start time and duration of meetings and calls to be edited from the calendar, instead of having to directly edit the activity record via the module. The records that appear on the calendar can also be dragged and dropped to new locations to change the start date and time.

Note: All occurrences of recurring meetings and calls cannot be modified by dragging one record of the series.

In addition, the activities can be dragged from the bottom of the box to be able to

change the duration of the activity. To do this, simply hover over the activity's box to make the two lines appear at the bottom. Click the two lines and drag to the new end time of the call or meeting.

Note: Changing the meeting details with drag-and-drop does not send a system-generated update to the meeting invitees.

More Information

Additional details for each activity can be viewed by clicking the "i" icon on the far right of each activity block on the calendar. This provides users a quick view of additional information in addition to what appears on the block. The pop-up window can also be used to access the record. Click the Pencil button to edit the record in the record view, the Preview button to view the record, or the "X" button to close the pop-up window.

The resulting pop-up window will show the following fields by default:

Module	Fields
Calls	Subject

	Start Date & Time Duration Related to Status Description (abbreviated)
Meetings	Subject Start Date & Time Duration Related To Status Description (abbreviated)
Tasks	Start Date & Time Due Date & Time Priority Status Description (abbreviated)

Note: The list of fields appearing here may only be configured through a code-level customization.

Next or Previous Calendar View

On the four corners of the Calendar, there are buttons that allow you to page through the given time frame in groups at a time, either the next or previous day, week, month, or year. The timeframe will change depending on which calendar you are viewing. When viewing the shared calendar, these buttons will always paginate by the week.

Editing Activities

Activities on the calendar can be edited directly from the calendar instead of having to access the record via the individual modules (e.g. Calls). Dragging and dropping activity cells within the calendar can make changes to the start and end dates. For more information on moving activities from within the calendar, please refer to the Moving Scheduled Activities section of this documentation.

Use the following steps to edit an activity via the calendar:

1. Navigate to the calendar by clicking the Calendar module tab.
2. Locate the activity (e.g. Call) you would like to edit and click on the cell to open it in record view.
3. Make the necessary changes to the activity, including setting reminders, adding invitees, or set any recurrences of the activity.
4. Once the necessary information is entered, click "Save" or, if you would like an invitation email to go out to the invitees where they can accept or deny the call or meeting, click "Save and Send Invites".

The record view can also be reached by clicking the Pencil button on the More Information pop-up for the activity. Please review the More Information section of this documentation for more information about using this popup.

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

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

Editing Recurring Meetings and Calls

When a meeting or call is set to be recurring, additional copies or duplicates of the call or meeting record are created for the specific time and date of each recurrence. Therefore, editing one record's cell on the calendar will not affect the other recurrences of the same call or meeting and will only affect the one recurrence you are editing. Users must select Edit All Recurrences from the meeting record's Action Menu.

Please refer to the steps in the [Editing All Recurrences via Record View](#) section of the Meetings documentation for instructions on how to edit all recurrences.

Deleting Calls and Meetings via Calendar

If a call or meeting record is invalid or should no longer appear on your calendar or in Sugar, it can be deleted through the record view via the calendar.

Use the following steps to delete a record via the calendar:

1. Navigate to the calendar by clicking the Calendar module tab.
2. Locate the call or meeting you would like to delete.
3. Click "i" icon located to the right of the subject and select the pencil icon from the popup.

4. This will take you to the meeting or call record view. Please refer to the steps in the [Deleting via Record View](#) section of the User Interface documentation for instructions on how to delete meetings.

Recurring calls and meetings can be deleted by this method if you would like to delete the individual call or meeting. Deleting one record through this process will not remove the entire series. Please refer to the steps in the [Deleting All Recurrences via Record View](#) section of the Meetings documentation for instructions on how to delete all recurrences.

Note: Your ability to delete calls and meetings in Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

Shared Calendar

The Shared Calendar option in the Calendar module allows you to view other user's calendars which is helpful when scheduling calls or meetings as well as keeping track of the other user's activities. The shared calendar also gives you the ability to schedule meetings and calls on behalf of the user so that they are automatically an invitee to the activity and the assigned user. Please note that the shared calendar is always viewed as a weekly view.

Use the following steps to enable the shared calendar:

1. Navigate to the calendar by clicking the Calendar module tab.
2. Click the Shared button on the upper left of the page.

3. Click the User List button on the upper right of the page then select the user(s) you wish to view calendars for in Sugar.

Note: You can filter the Users list by using the Filter user list by team dropdown above the Users list.

4. Click "Select" after choosing the user(s) to display all of the user's weekly calendars on the Calendar page.

Please note that you will only be able to see and edit activity records on the shared calendar as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

Publishing Calendars

Sugar allows users to share calendars between applications to ensure that activities do not overlap between calendars. The Sugar calendar can be viewed in other applications such as the Outlook calendar to display the user's free/busy time from Sugar.

Publishing Your Sugar Calendar

Sugar calendars can be shared and viewed with various iCal-compatible calendar applications (e.g. Apple Calendar or Google Calendar). The calendars are viewable as read-only in the external calendar applications and any edits to existing activities can only be done in Sugar. For more information on sharing your calendar on another application, please review the Calendar Options section in the Getting Started documentation.

Publishing to Your Outlook Calendar

You can specify settings in another application, such as Outlook, to enable the ability to view a user's free/busy information from the Sugar calendar. Please note that the settings must be configured on each user's computer. Once configured, the invitee shows as busy for any times currently scheduled in Sugar if the user's email address in Sugar matches the invitee email address in Outlook.

Use the following steps to configure this functionality:

1. In Sugar, navigate to your [user preferences](#) and select the Advanced tab.
2. Copy the Search location URL located at the bottom in the Calendar Options panel.
3. In Outlook, go to File > Options > Calendar > Free/Busy Options.
4. In the Internet Free/Busy section, paste the Search location URL into the corresponding box.

Integrating With MS Outlook

Sugar allows you to sync meetings and calls in Sugar with your local installation of Microsoft Outlook using the Outlook Plug-in. The plug-in also allows you to archive [emails](#) and sync [contacts](#). All meetings and calls, including recurring ones, can be synced using the plug-in. When a meeting or call is synced from Outlook to Sugar, the meeting or call will appear on the Sugar calendar, but will not be [editable](#) via Sugar and only [viewable](#).

For more information on using the Outlook Plug-in, please review the [Sugar Plug-in for MS Outlook User Guide](#).

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Calls

Overview

Sugar's Calls module is used to log phone calls which can be related to other Sugar records that may represent the attendees or topic for discussion. You can use call records to schedule and remind guests of future calls and to preserve a

record of any other calls that you hold. Call records may have multiple guests and can even be scheduled to recur.

Calls logged in Sugar also show on your Sugar calendar, from which you can create calls directly. You can also view and create calls via the Planned Activities dashlet on a contact or other related module record. For example, a contact record's Planned Activities dashlet displays Sugar call records that are related to the contact. Creating a call from the dashlet creates a relationship between the records automatically.

This documentation covers using the Calls module. For general usage instructions concerning views and actions that are common across most Sugar modules such as creating, editing, and deleting records, please refer to the Working With Calls section of this page.

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

Call Fields

The Calls module contains a number of stock fields which come out-of-the-box with Sugar. For information on using and and editing various field types, refer to the User Interface documentation. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to meet your organization's needs. Administrators or users with developer-level role access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

Field	Description
Assigned To	The Sugar user assigned to the call **Note**: The user in the "Assigned to" field cannot be removed from a call's guest list.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more

	details.
Created By	The Sugar user who created the call
Date Created	The date the call record was created
Date Modified	The date the call record was last modified
Description	A description or other information about the call
Direction	Indication of whether the call is inbound or outbound
Email Reminder Time	Send a reminder email to all call guests a specified duration before the call's start time
End Date	The date and time the call is expected to end
Modified By Name	The name of user who last modified the call record
Popup Reminder Time	Trigger a reminder popup alert to all Sugar user guests at a specified duration before the call's start time. **Note**: Users must be logged into Sugar in an open browser window in order to receive the popup reminder.
Related To	The related module record associated with the call
Repeat Type	For a recurring series of calls, the timespan unit (e.g. Every x days = "Daily", Every x weeks = "Weekly") to use for the interval of time between recurrences
Repeat Interval	Shown when Repeat Type does not equal "None", the number of units in the "Repeat Type" field that should pass between recurrences, for example: • **Every three days** : Repeat Type = "Daily"; Repeat Interval = "3" • **Every other week** : Repeat Type = "Weekly"; Repeat Interval = "2" • **Each year** : Repeat Type = Yearly; Repeat Interval = "1"

Repeat	Shown when Repeat Type does not equal "None"; Select "Until" to set a hard end date to recurrences or "Occurrences" to specify the number of times to repeat the call
Repeat Until	Shown when "Repeat" equals "Until", the date of the last occurrence in the series
Repeat Occurrences	Shown when "Repeat" equals "Occurrences", the number of calls in the series
Repeat on Days of Week	Shown when "Repeat Type" equals "Weekly", the day(s) of the week that the calls will occur in the recurring series
Custom Date (monthly)	Shown when "Repeat Type" equals "Monthly", select "Each" to specify a certain day(s) of the month or "On the" to set a variable such as the first Monday of each month
Custom Date (yearly)	Shown when "Repeat Type" equals "Yearly", select "None" to repeat the call on the same day every year or "On the" to set a variable such as the last Friday of each year
Start Date	The date and time that the call or first call in the series of recurring calls is scheduled to begin
Status	The current status (e.g. Scheduled, Held, Canceled) of the call record
Subject	The name or topic used to identify the call
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating and using tags, please refer to the [Tags](#) documentation.
Teams	The Sugar team(s) assigned to the call record

Calls Color Codes

When viewing the Calls list view and the Calls dashlet, the start date may be highlighted in blue or red. This allows users to quickly view scheduled calls that are either overdue or start within the next 24 hours. Please note that the start date will not be highlighted for calls with a status of "Held" or with a start date in the future (beyond 24 hours from current date and time).

Subject	Related to	Start Date	Status	Direction	⚙
Get more infor...	Southern Realty	2018-01-04 12:30pm	Scheduled	Outbound	👁 ▾
CALL for Case ...	Leak in water p...	2017-12-19 05:40pm	Scheduled	Inbound	👁 ▾
CALL for Case ...	Leakage in cable	2017-12-19 05:...	Held	Inbound	👁 ▾
Discuss review ...	B.C. Investing I...	2018-08-27 04:...	Canceled	Outbound	👁 ▾

The start dates in the Calls list view are highlighted as follows:

- **Blue** : The call has not been held and the start date occurs within the next 24 hours.
- **Red** : The call has not been held and the start date occurred in the past.

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

Working With Calls

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

Content Link	Description
[Creating Calls](#) [Basic Call Creation](#) [Creating via Quick Create](#) [Creating via Subpanels](#) [Creating via Duplication](#) [Importing Calls](#)	The Creating Records section covers the various methods of creating new call records, including via the Create button in the Calls module, the Quick Create menu on the upper right of every Sugar page, via the Calls subpanel on related module records, duplication of an existing call record, and importing a list

	of calls into Sugar using a .csv spreadsheet.
	The Viewing Records section describes the various methods of viewing call records, including via the Calls list view and record view, the Recently Viewed menu in the Calls module tab, list view dashlets showing call information, activity stream entries concerning call updates or where a user mentions a call, previewing calls in the right-hand side panel, and reports displaying call data.
	The Searching for Records section provides an introduction to the two searching methods for locating calls: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Calls module.
	The List View section walks through the many elements of the Calls List View layout which contains a filterable list of all call records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Calls list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.
	The Record View section walks through the many elements of the Calls Record View layout which contains detailed information about a single call record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Calls record view are described in the Record View Actions

	section of this page.
	The Editing Records section describes the various methods of editing existing call records, including inline via the Calls record view, in full edit mode on the record view, inline via the Calls subpanel on related module records, inline via the Calls list view, and via the Mass Update option on the list view.
	The Deleting Records section describes the various methods of deleting unwanted calls, including via the Calls record view, an individual record's Actions menu on the Calls list view, and the Mass Actions menu on the list view.
	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of calls and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).
	The Favoriting Records section describes the various methods of marking calls as favorites, including via the Calls list view, Calls record view, or any Calls subpanel appearing on the record view of a related module. Favoriting a call allows you to easily access it from list views, dashlets, or the Calls module tab.
	The Following Records section describes the various methods of marking calls as "Following" including via the Calls list view and record view. Following a call causes its activity stream updates to be included on your Home page and Calls list view activity streams so that you can easily keep up with changes and user posts on the record.
	The Sharing Records section provides instructions for the Share record view option which composes an email with a

	link to the call record. If the recipient is logged into Sugar, clicking the link will bring them directly to the call's record view.

Call Menus

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

Module Tab Menus

The Calls module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Calls" to access the list view. Once the Calls tab is visible in the navigation bar, you can click the triangle on the tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of calls you most recently viewed. The Favorites menu displays the list of calls you most recently marked as favorites.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Log Call	Opens the record view layout to create a new call

View Calls	Opens the list view layout to search and display calls
Import Calls	Opens the import wizard to create or update calls using external data
Activities Report	Displays existing reports based on the Calls module

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

- The Calls module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Calls module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Calls module for your entire Sugar instance. Reach out to your Sugar administrator to have the Calls module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

List View Menus

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

List View Mass Actions Menu

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

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

Menu Item	Description
Mass Update	Mass update one or more calls at a time
Delete	Delete one or more calls at a time
Export	Export one or more calls to a CSV file

List View Record Actions Menu

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

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

Menu Item	Description
Preview (Eye icon)	Preview this call in the intelligence pane

Edit	Edit this call
Close	Close this call **Note**: Shown only for calls that do not have a status of "Held"
Follow	Follow this call
Delete	Delete this call
Delete All Recurrences	Delete this call and all other call records in this call's series **Note**: Shown only for calls that are one in a recurring series

Record View Actions Menu

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

The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this call
Edit All Recurrences	Edit this call and all other call records in this call's series

	Note: Shown only for calls that are one in a recurring series
[Share](#)	Share a link to this call via email
[Copy](#)	Duplicate this call to create a new call
[Delete](#)	Delete this call
[Delete All Recurrences](#)	Delete this call and all other call records in this call's series **Note**: Shown only for calls that are one of a recurring series
[Close and Create New](#)	Close this call as "Held" and create a new copy of the call **Note**: Shown only for calls that do not have a status of "Held"
[Close](#)	Close this call as "Held" **Note**: Shown only for calls that do not have a status of "Held"

Call Guests

The following guests are automatically added to a call's guest list:

Automatic Guest	To Remove the Guest
The lead or contact in the "Related to" field, if any	This guest can be removed from the guest list at any time. If a lead or contact record is related to a call but is not on the guest list, then you will not see the call in the person's Calls subpanel.
The user who created the call	This guest can be removed from the guest list after initially saving the call. Create and save the call, click "Edit", and then click the Remove (-) button next to the created-by user's row in the Guests panel.
The user in the "Assigned to" field for the call record	The assigned user cannot be removed from the guest list. If you need to remove the assigned user from the guest list, you must first re-assign the call to a different user. Once the call record is assigned to a new user, the

	original user will remain a guest until removed via the Remove (-) button.

Users may add additional guests (e.g. contacts, leads, users) to calls via the Guests panel in the call's record view.

Adding via the Guests Panel

Use the following steps to add attendees via the Guests panel:

1. Navigate to the Calls module and create a new record or edit an existing record.
2. Scroll to the Guests panel and click on the Add (+) button located on the far right.

3. To add a guest, type in the name of the lead, contact, or user via the search bar that appears or select "Search for more..." to search the Contacts list view. To remove a guest, click the Remove (-) button to the right of the guest's row.
   Note: The user in the "Assigned to" field on the call record cannot be removed from a call. To remove the assigned user from the guest list, re-assign the call to a different user first.

4. Click "Save" or "Save and Send Invites" if you would like Sugar to send email invitations to the guests.

Note: Confirm that the guests' Sugar records have valid email addresses prior to clicking "Save and Send Invites". If a guest has no email address or their email address is marked as invalid, Sugar cannot email them an invitation to the call. A message and icon will alert you when adding the guest and when viewing the call's record view.

Once the guest has responded to the email invitation, their acceptance status will appear as a color-coded badge next to their name.

Adding via Create a Guest

Use the following steps to create a new contact and add them as a call guest:

1. Navigate to the Calls module and create a new record or edit an existing record.
2. Scroll to the Guests panel, click on the Add (+) button, and then click on "Search for more..." to expand the Contacts list view.

3. At the top of the list view, click the Create button and fill out the appropriate fields to create a new contact. Once completed, save the new contact record and Sugar will automatically add the contact to the guest list for the call.
4. Confirm the remaining fields and guests are configured appropriately and then save the call.

Recurring Calls

Calls can be saved as recurring events so that users do not have to create individual call records for regularly occurring events. Recurrences may occur daily, weekly, monthly, or yearly. When a recurring call is saved, Sugar creates a

series of individual call records so that all recurrences appear in the [Calls List View](#).

Creating Recurring Calls

To schedule a series of recurring calls, follow the instructions below. As an example, we will schedule a 30-minute call that recurs every other Thursday until the end of the 2017 calendar year.

1. Navigate to the Calls module and create a new record.
2. In the Start Date field, enter the date and time that the first Thursday call will occur and set the End Date for the same day but 30 minutes later.

   Note: If a recurring call's start date does not match the call's recurrence day(s) of the week, the start date will reset to the first matching day-of-week after the call's Date Created.

3. To create a series of calls, expand the field labeled "Repeat Type" and select an interval from the dropdown list. Our use case requires an interval of weeks (e.g. every two weeks), so we will select "Weekly" and specify our interval number in the next step.

4. Upon choosing a Repeat Type value, a new row of fields will appear on the form to gather the series information.

   The fields displayed are dependent upon the values you select as you go. Please refer to the [Call Fields](#) section for complete details on the available options. To schedule a call that recurs every other Thursday until the end of the 2017 calendar year, set the following values:
   - **Repeat Interval** : 2
   - **Repeat on Days of Week** : Thu
   - **Repeat** : Until

- **Repeat Until** : 2017-12-31
5. Confirm that the remaining fields and guests are configured appropriately.
6. Save the record and confirm that all recurrences appear as separate records in the Calls module's list view.

Editing All Recurrences via Record View

Recurring activities will display the option to edit all occurrences of the activity in the record's actions menu. This option will affect all of the call records in a series, even if some of the calls have been closed and set to "Held". Use the following steps to edit all recurrences in a series of calls via the record view:

1. Navigate to the record view of any call in the series of recurring calls.
2. Select "Edit All Recurrences" from the Actions menu.

3. Edit the call record as needed.

4. Then click on "Save" or "Save and Send Invites" to apply the changes to all held and unheld calls in the series.

Deleting All Recurrences via Record View

Recurring activities will display the option to delete all occurrences of the activity in the record's actions menu. This option will affect all of the call records in a series, even if some of the calls have been closed and set to "Held". Use the following steps to delete all recurrences in a series of calls via the record view:

1. Navigate to the record view of any call in the series of recurring calls.
2. Select "Delete All Recurrences" from the Actions menu.

3. A pop-up message will display asking for confirmation. Click "Confirm" to delete all held and unheld calls in the series.

Deleting All Recurrences via List View

Recurring activities will display the option to delete all occurrences of the activity in the record's actions menu in the list view. This option will affect all of the call records in a series, even if some of the calls have been closed and set to "Held". Use the following steps to delete all recurrences in a series of calls via the list view:

1. Navigate to the Calls list view by clicking the Calls module tab.
2. Use the Module Search to find the call in the series of recurring calls that you wish to delete.
3. Click the Record Actions Menu to the far right of the record's row and select "Delete All Recurrences".

4. A pop-up message will display asking for confirmation. Click "Confirm" to delete all held and unheld calls in the series.

Call Reminders

Sugar can remind guests when a call is scheduled to begin soon. Reminders can be sent via email to all of the guests or via pop-up to all user guests prior to the call's scheduled start date and time. By default, a user must set reminders when creating or editing the activity, but users can configure default reminders via their User Preferences, which will automatically set a default reminder time for calls they create in Sugar.

Note: The instance's outbound mail server must be configured via Admin > Email Settings in order for email reminders to be sent out. For more information on setting up the system email settings, please refer to the Email documentation in the Administration Guide.

Email Reminders

Email reminders can be set for any call record relative to its start date and time. The reminders are emailed to all guests with valid email addresses including non-Sugar users.

To schedule email reminders, select a time interval from the call's Email Reminder Time field:

Popup Reminders

Popup reminders can be set for any call record relative to its start date and time. Popup reminders appear for Sugar users on the call's guest list who are logged into Sugar in an open browser window at the time the reminder pops up.

To schedule popup reminders for logged-in Sugar users, select a time interval from the call's Popup Reminder Time field:

Closing Calls

Once a call has taken place, a user can close the call record, which changes the call's status to "Held". The "Close" option only appears for meetings that are considered open, or not "Held". Open calls are shown in the Planned Activities dashlet on the record view of related records and guests (e.g. Contacts, Leads, etc.). After closing a call, Sugar will move it from the Planned Activities dashlet to the History dashlet and the call record's status will display "Held" wherever it is viewed.

Closing via Record View

An open call's record view allows you to simply close the current call record or use "Close and Create New" to close the call and create a new call with the same details simultaneously. "Close and Create New" is often used when a user wants to log a completed call and easily schedule a follow-up call with the same people about the same topic.

To close a call record via its record view, click on the call to open its record view. Expand the record's Actions menu and select "Close" or "Close and Create New".

Depending on your selection, you will experience different results:

- **Close** : Instantly changes the call's status to "Held" and displays a Success message.
- **Close and Create New** : Instantly changes the call's status to "Held", displays a Success message, and opens a quick-create drawer for a new call record with the same values, guests, relationships. and other field values as the held call. The only field that is not copied from the original record is the status field, which will revert to "Scheduled" for the new call. Simply adjust the dates, times, and other information as needed, and save the new call as usual.

Once a call is closed, the closing options will no longer appear in the Actions menu.

Closing via List View

Use the following steps to close a call record via the list view:

1. Click the Calls tab to navigate to the Calls module's list view.
2. Use the [Module Search](#) to find the Call record(s) you wish to close.
3. Click the Record Actions Menu to the far right of the record's row and select "Close".

Sugar instantly changes the call's status to "Held" and displays a Success message.

Closing via Dashlet

The Planned Activities dashlet is available for home page dashboards and on the record view's intelligence pane for Sidecar modules. From the home page dashboard, the Planned Activities dashlet displays all upcoming calls and meetings assigned to you or your team depending on your chosen filters. When viewing the Planned Activities dashlet from a record's intelligence pane, the calls and meetings shown are only those that are related to the record you are viewing. For example, when viewing the contact record for Joe Smith, the Planned Activities dashlet in the intelligence pane will show only the upcoming calls and meetings with Joe Smith on the guest list. For more information about the Planned Activities dashlet, please refer to the [Intelligence Pane](#) documentation.

Use the following steps to close a call record via the Planned Activities dashlet:

1. Navigate to your home page's dashboard or the record view that contains the Planned Activities dashlet showing the call you would like to close.
2. If necessary, click the Calls tab on the Planned Activities dashlet to find the call.
3. Click the Held (x) button to the right of the call's row in the dashlet.

4. A pop-up message will display asking for confirmation. Click "Confirm" to move the meeting to the record's History dashlet with the status "Held".

Calendar Module and Calls

The Calendar module displays a user's calendar including their Sugar activity records. You can view, schedule, and manage their calls, meetings, and tasks directly within the calendar, allowing you to plan your time with full access to your other scheduling commitments.

Viewing via Calendar

The Calendar module allows users to schedule, view, and manage activities (calls, meetings, tasks) in Sugar. Meeting records are displayed in blue on the calendar and you can click the corresponding cell to view the meeting's details. You can also click the Info (i) icon in the meeting's cell for a quick view of additional details (e.g. Subject, Start Date & Time, etc.) of the meeting without navigating away from the calendar.

For more information on viewing and managing calls on the calendar, please refer to the Calendar documentation. Users also have the ability to view other user's scheduled activities via the shared calendar option. For more information on viewing the shared calendar, please refer to the Calendar documentation.

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

Creating via Calendar

There are two ways to create calls in the Calendar module. The first method is to create a call via the Schedule Call option in the Calendar module tab. This will open up the call's record view in edit mode to create a new call record. For more information on creating calls via the Calls module, please refer to the User Interface documentation and the various call-specific sections above.

The second method is to create the call directly within the Sugar calendar. For more information on navigating and viewing the calendar, please refer to the Calendar documentation. Use the following basic steps to create a call via the Calendar module:

1. Navigate to the calendar in Sugar by clicking on the Calendar module tab.
2. On the calendar grid, click directly on the cell corresponding to the date and time you wish to schedule the call.

3. Sugar assumes you want to schedule a meeting, but an alert will ask if you would prefer to create a task or call. Click on the hyperlinked text "Schedule a call" inside the alert.

4. You will now see the call's record view in edit mode so that you can create a new call record. Complete the call's fields as described in the User Interface documentation and the various call-specific sections above.

Editing via Calendar

Once calls are scheduled in Sugar, they appear in the assigned user's calendar based on the specified due date and time. You can click the Info (i) icon on the call's calendar cell to view additional information about the call.

The Additional Details popup window displays a Pencil icon on the upper right, which opens up the call's full record view for users to make any changes as necessary.

Click "Save" to preserve any changes made to the call record.

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Meetings

Overview

Sugar's Meetings module is used to track meetings which can be related to other Sugar records that represent the attendees or topic of discussion. You can schedule upcoming meetings that remind you when the scheduled time approaches or log meetings you have already held to keep a record of the discussion. Meeting records can have multiple attendees, both inside and outside Sugar, and include

the ability to send invitations as well as reminder emails. When a meeting is repeated on a regular schedule, you can configure it to recur.

Sugar's Calendar module displays your meetings and allows you to create meetings directly from your calendar. Meetings can also be viewed and created via the Planned Activities dashlet on a contact or other related module record. For example, a contact record's Planned Activities dashlet displays Sugar meeting records that are related to the contact. Creating a meeting from the dashlet creates a relationship between the records automatically.

This documentation will cover using the Meetings module. For general usage instructions concerning views and actions that are common across most Sugar modules such as creating, editing, and deleting records, please refer to the [Working With Sugar Modules](#) section of this page.

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

Meeting Fields

The Meetings module contains a number of stock fields which come out-of-the-box with Sugar. For information on using and and editing various field types, refer to the [User Interface](#) documentation. The following definitions are suggested meanings for the fields, but the fields can be leveraged differently to meet your organization's needs. Users with administrator or developer access can alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration Guide.

Field	Description
Assigned To	The Sugar user assigned to the meeting **Note**: The user in the "Assigned to" field cannot be removed from a meeting's guest list.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the [User Interface](#) documentation for more

	details.
Created By	The Sugar user who created the meeting
Date Created	The date the meeting record was created
Date Modified	The date the meeting record was last modified
Description	A description or other information about the meeting
Display URL	The URL to access the meeting if hosted by an external application (e.g. WebEx, GoToMeeting, etc.) **Note**: This is a dependent field that appears when a value other than "Sugar" is selected as the meeting type.
Email Reminder Time	Send a reminder email to all meeting guests at a specified duration prior to the meeting's start time
End Date	The end date and time of the meeting
Location	The meeting location
Meeting Password	The password to access the meeting via WebEx, GoToMeeting, etc. **Note**: This is a dependent field that appears when a value other than "Sugar" is selected as the meeting type.
Meeting Type	The application (e.g. Sugar, WebEx, GoToMeeting, etc.) hosting the meeting **Note**: External meeting accounts (e.g. WebEx, GoToMeeting) are added to the Meeting Type field when users connect to their account via the External Accounts tab in their user preferences. For more information on connecting to external applications, please refer to the External Accounts Tab section in the Getting Started documentation.
Modified By Name	The name of the Sugar user who last modified the meeting record
Popup Reminder Time	Trigger a reminder popup alert to all

	Sugar user guests at a duration prior to the meeting's start time. **Note**: Users must be logged into Sugar in an open browser window in order to receive the popup reminder.
Related To	The related module record associated with the meeting
Repeat Type	For a recurring series of meetings, the timespan unit (e.g. Every x days = "Daily", Every x weeks = "Weekly") to use for the interval of time between recurrences
Repeat Interval	Shown when Repeat Type does not equal "None", the number of units in the "Repeat Type" field that should pass between recurrences, for example: • **Every three days** : Repeat Type = "Daily"; Repeat Interval = "3" • **Every other week** : Repeat Type = "Weekly"; Repeat Interval = "2" • **Each year** : Repeat Type = Yearly; Repeat Interval = "1"
Repeat	Shown when Repeat Type does not equal "None"; Select "Until" to set a hard end date to recurrences or "Occurrences" to specify the number of times to repeat the meeting
Repeat Until	Shown when "Repeat" equals "Until", the date of the last occurrence in the series
Repeat Occurrences	Shown when "Repeat" equals "Occurrences", the number of meetings in the series
Repeat on Days of Week	Shown when "Repeat Type" equals "Weekly", the day(s) of the week that the meetings will occur in the recurring series
Custom Date (monthly)	Shown when "Repeat Type" equals "Monthly", select "Each" to specify a certain day(s) of the month or "On the"

	to set a variable such as the first Monday of each month
Custom Date (yearly)	Shown when "Repeat Type" equals "Yearly", select "None" to repeat the meeting on the same day every year or "On the" to set a variable such as the last Friday of each year
Start Date	The date and time that the meeting or first meeting in the series of recurring meetings is scheduled to begin
Status	The current status (e.g. Scheduled, Held, Canceled) of the meeting record
Subject	The subject of the scheduled meeting
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating and using tags, please refer to the [Tags](#) documentation.
Teams	The Sugar team(s) assigned to the meeting record

Meetings Color Codes

When viewing the Meetings list view and the Meetings dashlet, the start date may be highlighted in blue or red. This allows users to quickly view scheduled meetings that are either overdue or start within the next 24 hours. Please note that the start date will not be highlighted for meetings with a status of "Held" or with a start date in the future (beyond 24 hours from current date and time).

The start dates in the Meetings list view are highlighted as follows:

- **Blue** : The meeting has not been held, and the start date occurs within the

next 24 hours.

- **Red** : The meeting has not been held, and the start date has passed.

Please note that you can only see meeting records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration Guide.

Working With Sugar Modules

While the Meetings module has some features that only apply to meetings, it also uses the Sidecar user interface that most Sugar modules are based on. In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to meetings.

General Instructions for Working With Sugar Modules	Meetings-Specific Instructions
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Meetings-specific help exists for each topic, use the links below to navigate to sections of the current page.
[Creating Records](#)	[Creating Recurring Meetings](#) [Creating Meetings via Calendar](#) [Meeting Guests](#) [Meeting Reminders](#)
[Viewing Records](#)	[Viewing Meetings via Calendar](#)
[Searching for Records](#)	
[List View](#)	[List View Mass Actions Menu](#) [List View Record Actions Menu](#)
[Record View](#)	[Record View Actions Menu](#)
[Intelligence Pane](#)	
[Editing Records](#)	[Editing All Recurrences of a Meeting via Record View](#) [Editing Meetings via Calendar](#)
[Deleting Records](#)	[Deleting All Recurrences of a Meeting via Record View](#) [Deleting All Recurrences of a Meeting via List View](#) [Closing Meetings](#)
[Exporting Records](#)	

[Favoriting Records](#)	
[Following Records](#)	
[Sharing Records](#)	

Meeting Menus

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

Module Tab Menus

The Meetings module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list, and you can click "Meetings" to access the list view. Once the Meetings tab displays on the navigation bar, you can click the triangle on the tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform certain actions within the module. The [Recently Viewed menu](#) displays the list of meetings you most recently viewed. The [Favorites menu](#) displays the list of meetings that you most recently marked as favorites.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Schedule Meeting	Opens the record view layout to create a new meeting
View Meetings	Opens the list view layout to search and display meetings
Import Meetings	Opens the import wizard to create or update meetings using external data

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

- The Meetings module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Meetings module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Meetings module for your entire Sugar instance. Reach out to your Sugar administrator to have the Meetings module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

List View Menus

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

List View Mass Actions Menu

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

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

Menu Item	Description
Mass Update	Mass update one or more meetings at a time
Delete	Delete one or more meetings at a time
Export	Export one or more meetings to a CSV file

List View Record Actions Menu

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

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

Menu Item	Description
Preview (Eye icon)	Preview this meeting in the intelligence pane
Edit	Edit this meeting

[Close](#)	Close this meeting **Note**: Shown only for meetings that do not have a status of "Held"
[Follow](#)	Follow this meeting
[Delete](#)	Delete this meeting
[Delete All Recurrences](#)	Delete this meeting and all other meeting records in this meeting's series **Note**: Shown only for meetings that are one in a recurring series

Record View Actions Menu

The Meetings [record view](#) displays a single meeting in full detail including its fields, subpanels of related records, and activity stream. To access a meeting's record view, simply click a hyperlinked meeting name from anywhere within Sugar. The record view's Actions menu appears above the record's details and allows you to perform various operations on the current record.

The Actions menu allows you to perform the following operations:

Menu Item	Description
[Edit](#)	Edit this meeting
[Edit All Recurrences](#)	Edit this meeting and all other meeting records in this meeting's series **Note**: Shown only for meetings that are one in a recurring series
[Share](#)	Share a link to this meeting via email

Copy	Duplicate this meeting to create a new meeting
Delete	Delete this meeting
Delete All Recurrences	Delete this meeting and all other meeting records in this meeting's series **Note**: Shown only for meetings that are one of a recurring series
Close and Create New	Close this meeting as "Held" and create a new copy of the meeting **Note**: Shown only for meetings that do not have a status of "Held"
Close	Close this meeting as "Held" **Note**: Shown only for meetings that do not have a status of "Held"

Meeting Guests

The following guests are automatically added to a meeting's guest list:

Automatic Guest	**To Remove the Guest**
The lead or contact in the "Related to" field, if any	This guest can be removed from the guest list at any time. If a lead or contact record is related to a meeting but is not on the guest list, then you will not see the meeting in the person's Meetings subpanel.
The user who created the meeting	This guest can be removed from the guest list after initially saving the meeting. Create and save the meeting, click "Edit", and then click the Remove (-) button next to the created-by user's row in the Guests panel.
The user in the "Assigned to" field for the meeting record	The assigned user cannot be removed from the guest list. If you need to remove the assigned user from the guest list, you must first re-assign the meeting to a different user. Once the meeting record is assigned to a new user, the original user will remain a guest until removed via the Remove (-)

button.

Users may add additional guests (e.g. contacts, leads, users) to meetings [via the Guests panel](#) in the meeting's record view.

Adding via the Guests Panel

Use the following steps to add attendees via the Guests panel:

1. Navigate to the Meetings module and create a new record or edit an existing record.
2. Scroll to the Guests panel and click on the Add (+) button located on the far right.

3. To add a guest, type in the name of the lead, contact, or user via the search bar that appears or select "Search for more..." to search the Contacts list view. To remove a guest, click the Remove (-) button to the right of the guest's row.
Note: The user in the "Assigned to" field on the meeting record cannot be removed from a meeting. To remove the assigned user from the guest list, re-assign the meeting to a different user first.

4. Click "Save" or "Save and Send Invites" if you would like Sugar to send email invitations to the guests.
Note: Confirm that the guests' Sugar records have valid email addresses prior to clicking "Save and Send Invites". If a guest has no email address or their email address is marked as invalid, Sugar cannot email them an invitation to the meeting. A message and icon will alert you when adding the guest and when viewing the meeting's record view.

Once the guest has responded to the email invitation, their acceptance status will appear as a color-coded badge next to their name.

Adding via Create a Guest

Use the following steps to create a new contact and add them as a meeting guest:

1. Navigate to the Meetings module and create a new record or edit an existing record.
2. Scroll to the Guests panel, click on the Add (+) button, and then click on "Search for more..." to expand the Contacts list view.

3. At the top of the list view, click the Create button and fill out the appropriate fields to create a new contact. Once completed, save the new contact record and Sugar will automatically add the contact to the guest list for the meeting.
4. Confirm the remaining fields and guests are configured appropriately and then save the meeting.

Recurring Meetings

Meetings can be saved as recurring events so that users do not have to create individual meeting records for regularly occurring events. Recurrences may occur daily, weekly, monthly, or yearly. When a recurring meeting is saved, Sugar creates a series of individual meeting records so that all recurrences appear in the [Meetings list view](#).

Note: If a user creates a recurring meeting but the start date does not match the specified recurrence day(s) of the week, the start date will reset to the first matching day after the meeting's Date Created.

Creating Recurring Meetings

To schedule a series of recurring meetings, follow the instructions below. As an example, we will schedule a 30-minute meeting that recurs every other Thursday until the end of the 2017 calendar year.

1. Navigate to the Meetings module and create a new record.
2. In the Start Date field, enter the date and time that the first Thursday meeting will occur and set the End Date for the same day but 30 minutes later.

   Note: If a recurring meeting's start date does not match the meeting's recurrence day(s) of the week, the start date will reset to the first matching day-of-week after the meeting's Date Created.
3. To create a series of meetings, expand the field labeled "Repeat Type" and select an interval from the dropdown list. Our use case requires an interval of weeks (e.g. every two weeks), so we will select "Weekly" and specify our interval number in the next step.

4. Upon choosing a Repeat Type value, a new row of fields will appear on the form to gather the series information.

The fields displayed are dependent upon the values you select as you go. Please refer to the [Meeting Fields](#) section for complete details on the available options. To schedule a meeting that recurs every other Thursday until the end of the 2017 calendar year, set the following values:

- **Repeat Interval** : 2
- **Repeat on Days of Week** : Thu
- **Repeat** : Until
- **Repeat Until** : 2017-12-31

5. Confirm that the remaining fields and guests are configured appropriately.
6. Save the record and confirm that all recurrences appear as separate records in the Meetings module's list view.

Editing All Recurrences via Record View

Recurring activities will display the option to edit all occurrences of the activity in the record's actions menu. This option will affect all of the meeting records in a series, even if some of the meetings have been closed and set to "Held". Use the following steps to edit all recurrences in a series of meetings via the record view:

1. Navigate to the record view of any meeting in the series of recurring meetings.
2. Select "Edit All Recurrences" from the Actions menu.

3. Edit the meeting record as needed.
4. Then click on "Save" or "Save and Send Invites" to apply the changes to all held and unheld meetings in the series.

Deleting All Recurrences via Record View

Recurring activities will display the option to delete all occurrences of the activity in the record's actions menu. This option will affect all of the meeting records in a series, even if some of the meetings have been closed and set to "Held". Use the following steps to delete all recurrences in a series of meetings via the record view:

1. Navigate to the record view of any meeting in the series of recurring meetings.
2. Select "Delete All Recurrences" from the Actions menu.

3. A pop-up message will display asking for confirmation. Click "Confirm" to delete all held and unheld meetings in the series.

Deleting All Recurrences via List View

Recurring activities will display the option to delete all occurrences of the activity in the record's actions menu in the list view. This option will affect all of the meeting records in a series, even if some of the meetings have been closed and set to "Held". Use the following steps to delete all recurrences in a series of meetings via the list view:

1. Navigate to the Meetings list view by clicking the Meetings module tab.
2. Use the Module Search to find the meeting in the series of recurring meetings that you wish to delete.

3. Click the Record Actions Menu to the far right of the record's row and select "Delete All Recurrences".

4. A pop-up message will display asking for confirmation. Click "Confirm" to delete all held and unheld meetings in the series.

Meeting Reminders

Sugar can remind guests when a meeting is scheduled to begin soon. Reminders can be sent via email to all of the guests or via pop-up to all user guests prior to the meeting's scheduled start date and time. By default, a user must set reminders when creating or editing the activity, but users can configure default reminders via their User Preferences, which will automatically set a default reminder time for meetings they create in Sugar.

Note: The instance's outbound mail server must be configured via Admin > System Email Settings in order for email reminders to be sent out. For more information on setting up the system email settings, please refer to the Email documentation in the Administration Guide.

Email Reminders

Email reminders can be set for any meeting record relative to its start date and time. The reminders are emailed to all guests with valid email addresses including non-Sugar users.

To schedule email reminders, select a time interval from the meeting's Email Reminder Time field:

Popup Reminders

Popup reminders can be set for any meeting record relative to its start date and time. Popup reminders appear for Sugar users on the meeting's guest list who are logged into Sugar in an open browser window at the time the reminder pops up.

To schedule popup reminders, select a time interval from the meeting's Popup Reminder Time field:

Closing Meetings

Once a meeting has taken place, a user can close the meeting record, which changes the meeting's status to "Held". The "Close" option only appears for meetings that are considered open, or not "Held". Open meetings are shown in the Planned Activities dashlet on the record view of related records and guests (e.g. Contacts, Leads, etc.). After closing a meeting, Sugar will move it from the Planned Activities dashlet to the History dashlet and the meeting record's status will display "Held" wherever it is viewed.

Closing via Record View

An open meeting's record view allows you to simply close the current meeting record or use "Close and Create New" to close the meeting and create a new meeting with the same details simultaneously. "Close and Create New" is often used when a user wants to log a completed meeting and easily schedule a follow-up meeting with the same people about the same topic.

To close a meeting record via its record view, click on the meeting to open its record view. Expand the record's Actions menu and select "Close" or "Close and Create New".

Depending on your selection, you will experience different results:

- **Close** : Instantly changes the meeting's status to "Held" and displays a Success message.
- **Close and Create New** : Instantly changes the meeting's status to "Held", displays a Success message, and opens a quick-create drawer for a new meeting record with the same values, guests, relationships. and other field values as the held meeting. The only field that is not copied from the original record is the status field, which will revert to "Scheduled" for the new meeting. Simply adjust the dates, times, and other information as

needed, and save the new meeting as usual.

Once a meeting is closed, the closing options will no longer appear in the Actions menu.

Closing via List View

Use the following steps to close a meeting record via the list view:

1. Click the Meetings tab to navigate to the Meetings module's list view.
2. Use the Module Search to find the Meeting record(s) you wish to close.
3. Click the Record Actions Menu to the far right of the record's row and select "Close".

Sugar instantly changes the meeting's status to "Held" and displays a Success message.

Closing via Dashlet

The Planned Activities dashlet is available for home page dashboards and on the record view's intelligence pane for Sidecar modules. From the home page dashboard, the Planned Activities dashlet displays all upcoming calls and meetings assigned to you or your team depending on your chosen filters. When viewing the Planned Activities dashlet from a record's intelligence pane, the calls and meetings shown are only those that are related to the record you are viewing. For example, when viewing the contact record for Joe Smith, the Planned Activities dashlet in the intelligence pane will show only the upcoming calls and meetings with Joe Smith on the guest list. For more information about the Planned Activities dashlet, please refer to the Intelligence Pane documentation.

Use the following steps to close a meeting record via the Planned Activities dashlet:

1. Navigate to your home page's dashboard or the record view that contains the Planned Activities dashlet showing the meeting you would like to close.

2. If necessary, click the Meetings tab on the Planned Activities dashlet to find the meeting.
3. Click the Held (x) button to the right of the meeting's row in the dashlet.

4. A pop-up message will display asking for confirmation. Click "Confirm" to move the meeting to the record's History dashlet with the status "Held".

Calendar Module and Meetings

The Calendar module displays a user's calendar including their Sugar activity records. You can view, schedule, and manage calls, meetings, and tasks directly within the calendar, allowing you to plan your time with full access to other scheduling commitments.

Viewing via Calendar

The Calendar module allows users to schedule, view, and manage activities (calls, meetings, tasks) in Sugar. Meeting records are displayed in blue on the calendar and you can click the corresponding cell to view the meeting's details. You can also click the Info (i) icon in the meeting's cell for a quick view of additional details (e.g. Subject, Start Date & Time, etc.) of the meeting without navigating away from the calendar.

For more information on viewing and managing meetings on the calendar, please refer to the Calendar documentation. Users also have the ability to view other user's scheduled activities via the shared calendar option. For more information on viewing the shared calendar, please refer to the Calendar documentation.

Please note that you can only see meeting records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation.

Creating via Calendar

There are two ways to create meetings from the Calendar module. The first method is via the Schedule Meeting option in the Calendar's module tab. This will open the meeting's record view in edit mode so that you can create a new meeting record. For more information on creating meeting records, please refer to the [User Interface](#) documentation and the various meeting-specific sections above.

The second method is to create the meeting directly within the Sugar calendar. For more information on navigating and viewing the calendar, please refer to the [Calendar](#) documentation. Use the following basic steps to create a meeting via the Calendar module:

1. Navigate to the calendar in Sugar by clicking on the Calendar module tab.
2. On the calendar grid, click directly on the cell corresponding to the date and time you wish to schedule the meeting.

3. An alert will appear asking if you would prefer to create a task or call record. To continue creating a meeting, click on the Close (x) icon on the alert.

4. You will now see the meeting's record view in edit mode so that you can create a new meeting record. Complete the meeting's fields as described in the User Interface documentation and the various meeting-specific sections above.

Editing via Calendar

Once meetings are scheduled in Sugar, they appear in the assigned user's calendar based on the specified due date and time. You can click the Info (i) icon on the meeting's calendar cell to view additional information about the meeting.

The Additional Details popup window displays a Pencil icon on the upper right, which opens up the meeting's full record view for users to make any changes as necessary.

Click "Save" to preserve any changes made to the meeting record.

Last Modified: 2019-11-11 21:20:06

Emails

Overview

Sugar's Emails module stores copies of email messages that have been sent from or archived to Sugar. While Sugar is not primarily an email application, it does allow users to send email using their personal email address, a shared email account, or a system account and to archive copies of messages and attachments sent or received through a third-party email application.

This documentation will cover how to send and archive email messages and how to use the following modules:

- Emails
- Email Signatures
- Email Templates
- Outgoing Email Accounts

In the Email Signatures, Email Templates, and Outgoing Email Accounts modules, you can view only the records that you have created with the exception of the system email account, which may be visible in the Outgoing Email Accounts list view. In the Emails module, you can search for and view emails that you have archived to Sugar or that have been archived by other users as allowed by your team membership, user access type, and assigned roles. Emails that are in a Draft status can only be seen by the created-by user and administrators. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration Guide.

Note: There are three types of [outgoing email accounts](#) in Sugar: system, user, and default user. This document focuses primarily on the user email account and the default user email account. For more information about the system email account and additional details on administering user email accounts, please refer to the [Email](#) documentation in the Administration Guide.

Sending and Receiving Email in Sugar

Sending Email

Emails sent from Sugar are automatically archived in Sugar and related to records that match the email addresses in the message. To send emails through Sugar, users must configure their default user email account via Email Settings. Users may add additional [outgoing email accounts](#) (e.g. work email, home email, school email) if the administrator has enabled the "Allow users to use this account for outgoing email" option in [Admin > System Email Settings](#).

Alternatively, the Administrator may choose to allow users to send email using the system email account via the option in [Admin > System Email Settings](#) (this is not common). In this scenario, users will not be able to configure their default email account and must instead utilize the system email account or create a new user email account. Users will see the system email account in the Outgoing Email Accounts list view with an asterisk to indicate that it is a system account.

Receiving Email

Because Sugar is not an email application, users cannot receive email directly to Sugar via their user email accounts. Instead, users must archive emails they receive using one or more of the techniques listed in the [Archiving Emails](#) section of this page.

Emails

The Emails module contains email records, which are copies of the emails that have been sent from or archived to Sugar. Users can view, sort, filter, and favorite email records according to their team and role memberships even if the emails have been sent or archived by a different user.

For basic use and navigation of the emails module, please refer to the [Working With Emails](#) section, which contains links to the User Interface documentation for behaviors that are common among most Sidecar modules. More information is available on email-specific functionality such as sending, replying, archiving, and composing emails in the sections under the [Composing Emails](#) header below.

Email Fields

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

Field	Description	Notes
Assigned To	The Sugar user assigned to the email record	By default, the Assigned To user is the user who creates and sends the message. For messages saved as drafts, the Assigned To user is the only users who will be able to edit and send the draft later.
Attachments	Any attachments included with the email	For more information, please refer to the Adding Attachments section of this page.
Body	The content of the email message	There is no label for this field in the application. The body of your message is composed in the TinyMCE text editor window. For more information on how to use the text editor, please refer to the User Interface documentation in the Application Guide.
Date	The date the message was sent, received, or modified, depending on the email's status and direction	**Archived (incoming)** : The date the email was received **Archived (outgoing)** : The date the email was sent **Draft** : The last modified date
Direction	The direction (e.g. Outbound, Inbound, Internal, Unknown) of the	Not visible on record views or as a list view column, the Direction field

	email based on the sender and recipient(s) in the email message.	is available only as an available filter field in the Emails list view. For more information on filtering the Emails list view using the Direction field, refer to the **Email's Direction Field** . **Note**: Draft emails will have a direction of "Unknown".
From	The email address that the email was or will be sent from	This field shows your available outgoing email accounts and determines the From name and From address that the recipient(s) will see. **Note**: The Emails list view can be filtered using the From field to locate emails from a particular sender.
Inbound Account	The incoming email account that received the email	Not visible on record views, the Inbound Account field is available only for filtering the Emails list view.
Number of Attachments	An integer representing the quantity of individual files that are related to the email record as attachments	Not visible on record views or as a list view column, the Number of Attachments field is available only as an available filter field in the Emails list view.
Recipient Fields	The fields that contain email addresses of the email recipients	**To** : The email address(es) that the email was or will be sent to **Cc** : The email address(es) that the email was or will be copied to **Bcc** : The email

		address(es) that the email was or will be blind copied to For more information, please refer to the [Working With Recipient Fields](#) section of this page. **Note**: The Emails list view can be filtered using the To, CC, or Bcc fields to locate emails from certain recipients.
Related To	The module and record that is related to this email	The email will be listed in a subpanel under its "Related To" record.
Status	The state of the message: - **Archived** : The message has been sent or received. The message may have been sent through the Sugar application or synchronized to Sugar from an external email client such as Microsoft Outlook. - **Draft** : The message has not yet been sent from Sugar. Email records in a draft state are only visible to the email's assigned user and the administrator.	Sugar does not differentiate between sent and received emails via the Status field, but users can find messages by direction by filtering the Emails list view using the Direction field.
Subject	The subject line for the email message	

Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports	For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) whose users have access to the email record according to their role permissions	

Working With Emails

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

Content Link	Description
Emailing Sugar Records Emailing via Emails Module Emailing via Quick Create	Once an outgoing email account has been properly configured, Sugar allows users to compose email messages in the application and send them to recipients. Emails composed in Sugar utilize rich-text formatting utilizing the TinyMCE text editor. The links to the left will take you to the corresponding section of the User Interface documentation where you can learn about the various ways to send emails to records in Sugar.
Viewing Emails Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Dashlets Viewing via Activity Streams Viewing via Preview Viewing via Reports	The Viewing Records section describes the various methods of viewing archived email records, including via the Emails list view and record view, the Recently Viewed menu in the Emails module tab, list view dashlets showing email information, Activity Stream entries concerning email updates or where a user mentions an email, previewing emails in the right-hand side panel, and reports displaying email data.
Searching for Emails	The Searching for Records section

[Global Search](#) [List View Search](#) [Creating a Filter](#) [Saving a Filter](#)	provides an introduction to the two searching methods for locating emails: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Emails module. **Note**: The "My Sent" filter on Emails list view shows all emails where the sender is the current user, regardless of which email account was used to send the message. To restrict search results by the [Group Inbound](#) account that received them, create a filter using the "Inbound Account" field.
[Emails List View](#) [Total Record Count](#) [Create Button](#) [List View Search](#) [Checkbox Selection](#) [Mass Actions Menu](#) [Favorite Designation](#) [Column Reordering](#) [Column Resizing](#) [Column Sorting](#) [Column Selection](#) [Preview](#) [Record Actions Menu](#) [More Emails](#) [Activity Stream](#) [Intelligence Pane](#)	The List View section walks through the many elements of the Emails List View layout which contains a filterable list of all email records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Emails list view are described in the [List View Mass Actions Menu](#) and [List View Record Actions Menu](#) sections of this page.
[Emails Record View](#) [Favorite Designation](#) [Next or Previous Record](#) [Actions Menu](#) [Show More](#) [Subpanels](#) [Related Record Subpanels](#) [Filtering Subpanels](#) [Reordering Subpanels](#) [Activity Stream](#) [Intelligence Pane](#)	The Record View section walks through the many elements of the Emails Record View layout which contains detailed information about a single email record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Emails record view are described in the [Record View Actions Menu](#) section of this page.
[Editing Emails](#) [Editing Inline via Record View](#) [Editing via Record View](#)	The Editing Records section describes the various methods of editing existing email records, including inline via the

[Editing Inline via Subpanels](#) [Editing Inline via List View](#) [Mass Editing via List View](#)	Emails record view, in full edit mode on the record view, inline via the Emails subpanel on related module records, inline via the Emails list view, and via the Mass Update option on the list view. **Note**: Users cannot edit an email's content, dates, or recipients once it has been archived. Users with appropriate role permissions can, however, edit the Assigned To, Teams, Related To, and Tags fields for archived emails.
[Deleting Emails](#) [Deleting via Record View](#) [Deleting via List View](#) [Mass Deleting via List View](#)	The Deleting Records section describes the various methods of deleting unwanted emails, including via the Emails record view, an individual record's Actions menu on the Emails list view, and the Mass Actions menu on the list view. **Note**: Deleting an email will also delete any attachments for the email from the Notes module. To preserve attachments, download and save email attachments either locally or into the Sugar Documents module before deleting an email.
[Exporting Emails](#)	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of emails and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).
[Favoriting Emails](#) [Favoriting via List View](#) [Favoriting via Record View](#) [Favoriting via Subpanel](#)	The Favoriting Records section describes the various methods of marking emails as favorites, including via the Emails list view, Emails record view, or any Emails subpanel appearing on the record view of a related module. Favoriting an email allows you to easily access it from list views, dashlets, or the Emails module tab.

Email Menus

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

Emails Module Tab Menu

The Emails module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen. Depending on your settings, you may have to click "Show More" in order to see the Emails module tab. Click the tab to access the Emails list view. You can also click the triangle on the Emails module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of emails you last viewed in the module.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Compose Email	Opens the composition layout to compose and send a new email message or, optionally, save the message as a draft

Create Archived Email	Opens the composition layout to create a historical record of an email message that was sent or received outside of the Sugar application
View Emails	Opens the Emails list view to search and display email messages
Create Email Template	Opens the Email Templates edit view layout to create a new email template
View Email Templates	Opens the Email Templates list view to search and display email templates
Create Email Signature	Opens the composition layout to create a new email signature
View Email Signatures	Opens the Email Signatures list view to search and display email signatures
Email Settings	Opens the Outgoing Email Accounts list view to display, edit, and create email accounts

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

- The Emails module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile, click the Advanced tab, and check the Layout Options section. If you see the Emails module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Emails module for your entire Sugar instance. Reach out to your Sugar administrator to have the Emails module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

List View Menus

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

List View Mass Actions Menu

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

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

Menu Item	Description
Mass Update	Mass update one or more email records at a time
Delete	Delete one or more emails at a time
Export	Export one or more email records to a CSV file

List View Record Actions Menu

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

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

Menu Item	Description
Preview (Eye icon)	Preview this email in the intelligence

	pane
Edit	Edit this email
Delete	Delete this email

Record View Actions Menu

The Emails record view displays a single email in full detail including its fields, subpanels of related records, and activity stream. To access an email's record view, simply click a hyperlinked email subject from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Reply	Respond to the sender of this email
Reply All	Respond to the sender and all other recipients of this email
Edit	Edit this email
Delete	Delete this email

Archiving Emails

When a copy of a sent or received email message is stored in Sugar, it is considered an archived email. Users cannot edit an email's content, dates, or recipients once it has been archived. Users with appropriate role permissions can, however, edit the Assigned To, Teams, Related To, and Tags fields for archived emails.

Note: Assignment notifications, password-reset emails, scheduled reports, and SugarBPM emails sent from Sugar will not be stored in Sugar as archived emails.

There are several ways that emails may be archived in Sugar, including:

- Manually creating an archived email via "Create Archived Email"
- Composing and sending an email from Sugar via the Emails module
- Sending an email campaign via the Campaigns module
- Receiving a message to a Group Inbound Email account in Sugar
- Archiving emails via the Sugar Email Archiving service (a.k.a. "SNIP")
- Archiving emails via a connector, third-party application, or API (e.g. MS Outlook Plug-in, Collabspot)

Note: When an email record is archived to Sugar, the service that imports the email may set the Teams field for the email record. If the team is not set at the time of archive, the email's team will default to "Global". Users with the appropriate permissions may update the Teams field after the email has been archived in Sugar.

Manually Creating Archived Emails

Users who do not have an email account configured in Sugar or who would like to log an email that was not automatically archived can manually create copies of email messages for archival purposes. To create an archived email in Sugar, navigate to the Emails module and select "Create Archived Email" from the Emails module tab menu. Alternatively, navigate to the record that you would like to relate to the archived email and select "Create Archived Email" from the record's History dashlet.

The email composer window will open where you can manually copy the contents of an email you have already sent or received outside of Sugar. When creating an archived email, the Send button is hidden. Instead, there is an Archive button, which allows the user to log the message without actually transmitting it.

In addition to completing the standard email [fields](#), indicate the date and time that the email was sent or received in the fields labeled "Date Sent". After copying the contents of the message you want to archive, click the "Archive" button to save the record in Sugar.

Please note that, like other archived emails in Sugar, you cannot edit the message's content, dates, or recipients once it has been archived. Users with appropriate role permissions can, however, edit the Assigned To, Teams, Related To, and Tags fields for archived emails.

Composing Emails

There are several places in Sugar where you may create an email message, but this section focuses on the composition elements of the email message such as recipients, attachments, templates, and signatures. For more information on places you can create emails in Sugar, please refer to the [User Interface](#) documentation.

Working With Recipient Fields

Sugar allows multiple recipients for an email message using the To, Cc, and Bcc fields. To send a message, at least one of the three recipient fields must contain at least one valid recipient. For example, a user may send a message with recipients in only the Bcc field if they want to hide the recipients' email addresses from each other.

To include Cc or Bcc recipients, click the "Cc" or "Bcc" button to expand the recipient field. You can click the buttons again to hide them or simply click another area of the record such as the Body or Subject field.

Note: When composing email messages via Quick Create, Sugar will automatically hide the recipient form fields and populate the message's "To" and "Related To" fields with the name and email address of the record you are viewing. To edit or override the default recipient, click directly on the hard-coded name above the Subject field and the area will transform into the standard From/To/Cc/Bcc form seen in the image above. For more information, please refer to the User Interface documentation.

You can type email addresses directly in the recipient fields or look up recipients in the Address Book. For more information, please refer to the Freehand Address Entry and Using the Address Book sections of this page. When adding recipients, keep in mind the following tips for working with recipient fields:

- To select a recipient, click the recipient's pill in the recipient field and it will turn blue to indicate that it is in a selected state.

- To select multiple recipients within the same field, hold down the Shift or Command key then click the desired recipient pills.
- To move one or more recipients between the To, Cc, and Bcc fields, select the recipient(s) and drag your selection from one field to the other.

- To remove recipients from the message altogether, click the x inside the recipient's pill or select the recipient(s) and press the Delete key on your keyboard.
- To deselect recipient(s), click the blank space inside the field.

Using the Address Book

You can search across modules using the Address Book in the Emails module, which aggregates the users, contacts, leads, targets, and accounts in Sugar that have at least one valid email address.

To access the address book, click on the address book icon next to the recipient field you are working with.

You can search for and select multiple recipients from the Address Book and filter the Address Book's list view to restrict results to a specific module such as contacts or users.

You can also tap into the Address Book by typing a first name, last name, email address, or account name directly in any of the recipient fields on the email message. Sugar will find potential matches as you type and you can select the correct recipient from the suggestions. Each matching recipient option will display a badge that indicates which module contains the record (e.g. "Le" for Leads).

Freehand Address Entry

In addition to using the address book, you may choose to click inside any of the

recipient fields and type one or more email addresses freehand. Email addresses do not need to be stored in Sugar to be used as email recipients. If an email address already exists in the database, then Sugar will find it as you type and you can select it from the suggestions. If the email address is not yet stored in the database, then simply hit the Enter key to commit the new address to the recipient field.

Note: Sugar validates email addresses on-the-fly and warns the user when an invalid email address has been entered.

Adding Attachments

Sugar allows you to send attachments along with your email. Attachments can be files from your local computer or documents from within Sugar. Any user who has permission to view the email record can also access attachments for the message. To include an email attachment, simply click on the Attachment icon in the toolbar:

The Attachment menu provides two options:

- **Upload From Local** : Opens your system's file navigator so you can find and attach a file that is saved on your computer
- **Sugar Document** : Opens the Search and Select screen so you can search for a file in Sugar's Documents module

Note: File attachments from your computer are stored in the Notes module, so you must have permission to create notes in order to upload attachments. If you do not have permission to create notes, the Attachment option will be hidden. Similarly, users who do not have role permission to view records in the Documents module will not see the "Sugar Document" attachment option. For more information on configuring roles in Sugar, please refer to the [Role Management](#) documentation in the Administration Guide.

After selecting the documents you want to attach to the message, they will appear under the body field of the email message.

Each attachment will display an approximate file size in parentheses next to the file name. If the file you are attaching exceeds or causes the total size of attachments on the message to exceed the system's maximum upload size, the attachment will fail to upload. For more information on configuring the system's maximum upload size, please refer to the [System](#) documentation in the Administration Guide.

To remove an attachment before sending a message, simply click on the x next to the attachment's name.

When viewing draft and archived emails in list view, a paper clip icon next to a record's subject will indicate that the email contains one or more attachments. You can download an archived email's attachments from the email record's preview or from record view by clicking on the file name.

Using a Template

Email templates can save time and reduce errors when composing common email messages. For more information on how to create an email template, please refer to the [Email Templates](#) section of this documentation.

As a best practice, send templates that contain variables to a single recipient only. If the template has any variable fields defined in it (i.e. $contact_name), Sugar will replace the variables with corresponding values from a related record. If multiple records share the same email address or multiple recipients are on the email, Sugar will pick only one of the record's values to place in the email template to send to all of the email addresses. If no related record is found, Sugar will warn you that the variable fields will be blank before you send the message. For more information on how to send a dynamic variable to many recipients, please refer to the [Campaigns](#) documentation in the Application Guide.

To use an email template, [compose a new email message](#) and click on the Template icon in the toolbar before completing any other fields on the email.

After clicking the Template icon, the Search and Select window will appear where you can find the appropriate template for your message. Select the radio button next to the template to pull all of its content and any attachments into your current message.

Note: If the body or subject of the email contains any data before a template is selected, the body and subject will be removed and replaced with the template data. Similarly, if the message contains an attachment, the attachment will be removed and replaced with any attachments that the template may contain.

Once an email template has been inserted in the email editor, users are free to edit the subject and email body, add or remove [attachments](#), and insert a [signature](#) on the message.

Using an Email Signature

Email signatures are an easy way to standardize the messages you send with your contact details or other messaging. For more information on how to create an email signature, please refer to the Email Signatures section of this documentation.

Follow these steps to choose an email signature for a message:

1. First, create a new email or edit a saved draft.
   - If you have created a default signature, it will automatically appear in the body of the message and you can simply type your message above the signature.

   - If you have not designated a signature as default or if you would like to select a different signature, continue to step 2.
2. Place your cursor inside the body of the message where you want the signature to appear.
3. Click on the Email Signature icon in the toolbar and select your preferred signature from the dropdown list.

To remove a chosen signature, simply select another signature to replace it. If you decide to use no signature at all after a signature has been added to the composer, you must delete it manually in the composition window.

Note: The Email Signature button is disabled when the cursor is not in the body of the email composer field and when there are no signatures defined for the user.

Saving and Editing Draft Emails

To save a draft of an email that you do not want to send right away, simply start [composing a new email message](#) and click "Save Draft" instead of using the Send button. Any content, recipients, templates, and signatures used in the email are saved with the draft. Only the administrator and the Assigned To user can view and edit emails in a Draft status.

Note: Draft emails cannot be re-assigned to another user, so mass updating the Assigned To field for emails will not re-assign drafts if they are selected.

Users can only access the draft emails that they have created. A user's drafts appear alongside archived emails in the Emails list view and can be isolated in list view using the "My Drafts" filter.

Click on the subject of a draft email to launch the Compose Email screen where the email's assigned user can continue editing the email and save the email as a draft again or send the email, which will change the email's status to "Archived".

Sending Emails

To send an email to the recipients in an email's To, Cc, and Bcc fields, simply click the Send button.

Sent emails will use the settings configured for the From account to send the email. A copy of the sent email will be saved to Sugar as "Archived" in the Emails module and can be isolated in list view using the "My Sent" filter.

Replying to Emails

Users can access the "Reply" and "Reply All" functions from the record view of emails that have an Archived status. Select "Reply" to reply to only the sender of the selected email or select "Reply All" to reply to the sender and all other recipients of the original email.

When replying to an email, Sugar creates a new email while populating the body, subject, and recipients of the email and carrying over the Related To, Assigned To, and Teams fields from the original email. The subject line of the email you are replying to carries over to the new email preceded by the letters "Re: ". The body of the email you are replying to is also carried over to the reply message with a line above the contents to separate the original email from the content you are adding to the reply.

Enter your reply above the divider line in the compose email screen. For more information on how to compose an email, please refer to the Composing Emails section.

Note: If the original email contained any attachments, they will not copy to the reply email.

Forwarding Emails

Users can access the Forward function from the record view of emails that have an Archived status. Select "Forward" to open a compose window where you can specify one or more recipients.

When forwarding an email, Sugar creates a new email while populating the body and subject of the email and carrying over the Related To, Assigned To, and Teams fields from the original email. The subject line of the email you are forwarding carries over to the new email preceded by the letters "FW: ". The body of the email you are forwarding is also carried over to the message with a line above the

contents to separate the original email from the content you may optionally add to the message. The recipient fields must be completed by the user before the email can be forwarded. For more information on adding recipients, please refer to the Working With Recipient Fields section of this page.

Optionally, enter a message above the divider line in the compose email screen. For more information on how to compose an email, please refer to the Composing Emails section.

Note: If the original email contained any attachments, they will not copy to the forwarded email.

Relating Emails to Records

Emails in Sugar are implicitly related to records in Sugar that match an email address in the From, To, or Cc fields in the email. This implicit relationship is made for emails sent from Sugar as well as emails archived in Sugar via incoming email accounts or the Sugar Email Archiving service. Implicitly related emails will show in the Emails subpanel and History dashlet of the related record.

While composing an email, users can set an explicit relationship via the Relates To field. This allows the user to relate the email to a Sugar record regardless of whether the record contains an email address related to the email.

In addition to using the Relates To field, you can link additional module records to emails via the related record subpanels on the email's record view. Conversely, you can also select emails to relate from the Emails subpanel of related records.

Understanding Email Address Opt-Outs

Email addresses can be marked as opted out in Sugar to indicate that the owner has not consented to receive marketing campaigns. To mark an email address as opted opt, simply click the button with a slashed circle to the right of the email address when editing the record (e.g. contact).

Administrators can configure whether new email addresses added to Sugar records default to opted-in or opted-out by using the "Opt-out new email addresses by default" option via Admin > System Email Settings. For more information regarding this option, refer to the Email documentation in the Administration guide.

When a recipient clicks the opt-out link in an email-type campaign, Sugar will automatically mark the recipient's email address as "Opted Out" in the corresponding record (e.g. contacts). For more information regarding opt-outs and campaigns, please refer to the Campaigns documentation as well as the Understanding Campaign Opt Outs article.

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

Please keep in mind that although email addresses marked as opted out cannot receive campaign emails, users can continue to send them transactional emails in Sugar. The recipient pill will display an opt-out status to indicate that it is an opted-out email address.

Unlinking Emails

When an email is explicitly related to a record, users have the option of unliking the email record via the Emails subpanel. Please note that the unlink option is not available for email records that are implicitly related via a matching email address or automated email importing. As a result, the unlink option is not available when viewing the Emails subpanel in the following modules: Accounts, Contacts, Leads, Targets, Cases, and Opportunities. For more information on the different ways emails can be related to records in Sugar, please refer to the Relating Emails to Records section.

To delete the relationship between the record and the related email, simply navigate to the module record (e.g. Quotes) containing the related email and choose "Unlink" from the Actions menu on the far right of the desired record's row in the Emails subpanel. Please keep in mind that performing this action removes the relationship but does not delete the email record itself.

Email Templates

Email templates are used in Sugar to send simple form letters, automated email responses, or just commonly used emails to save time and prevent typos. They are also useful for ensuring a consistent style and voice for communications transmitted throughout your organization. Email templates can contain text, HTML content, images, and attachments. The content of templates may contain variables

for field values like the recipient's name so that you can personalize the email for the recipient.

For information on using an existing template in an email message, please please refer to the [Using a Template](#) section of this page.

Note: Sugar's core product includes several places where email templates can be created for different purposes. For more information on alternative types of email templates in Sugar, please refer to the [Understanding Email Templates for Campaigns, Workflows, and SugarBPM](#) article.

Viewing Email Templates

To view the list of available templates, navigate to the Emails module and select "View Email Templates" from the [Emails module tab](#) menu. Please note that you will only be able to see email templates as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.

Note: If you are logged in as an administrator, you can view and edit the "Forgot Password email" and "System-generated password email" system templates via the Email Templates list view.

Creating Email Templates

To create a new email template in Sugar, click the triangle on the Emails module tab and select "Create Email Template" from the module tab menu.

Refer to the [Email Template Fields](#) and [Inserting Template Variables](#) sections to complete the email template. For instructions on using templates in email messages, please refer to the [Using a Template](#) section of this page.

Email Template Fields

The Email Templates module contains the following fields:

Field	Description
Assigned To	The Sugar user assigned to the process email template
Body	The content of the message including any text, HTML content, images, or variables **Note**: Use the TinyMCE functions to add formatting to the content. For more information on using TinyMCE, please refer to the User Interface documentation. To insert content variables, please refer to the Inserting Template Variables section of this page. If images or advanced CSS are required in your email template, it is highly recommended to host the images or CSS file on a publicly available hosting service and link to it in the email template. For more information, please refer to the Using CSS in Email Templates article.
Date Created	The date the email template record was created
Date Modified	The date the email template record or its content was last modified
Description	A description or other information about the email template
Name	A unique and descriptive name to help users find the template
Subject	The subject that recipients will see in their email inbox
Teams	The Sugar team(s) that should have access to the email template
Type	The type of email template **Note**: The Type field defaults to "Email" when creating email templates via the

	Emails module. For more information on how to create an email template for campaigns, please refer to the [Campaigns](#) documentation.

Inserting Template Variables

When constructing the subject and body of an email template, Sugar allows you to insert variables that correspond with Sugar fields on related records. The variables will be replaced with the related record's field values when the email is sent from Sugar. For example, you can insert a variable for the recipient's first name on a template that you plan to send to leads or contacts.

Use the following steps to insert a variable for the recipient's first name into an email template:

1. Click to place your cursor on the location in the subject or body where the recipient's first name should appear.

2. In the Insert Variable row, select the module you would like to insert a variable from.

3. Set the second dropdown to the desired field from the modules selected in the first dropdown. For our example, select "First Name".

4. Click "Insert" to insert the generated variable name to your subject or body at your cursor's location.

If there are no images, links, or formatting in your email, then sending it as text only may be a good option. Click the Send Text Only checkbox to remove the HTML formatting options. Alternatively, you can click "Edit Plain Text" at the bottom of the page to have the plain text option send differently than the HTML text.

Editing Email Templates

To edit a template, navigate to the Emails module and select "View Email Templates" from the Emails module tab menu. Click on the name of the template you want to edit and adjust the content, fields, and variables as needed. Please note that you will only be able to see and edit email templates as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Email Signatures

An email signature is a snippet of text positioned below the body of an email message that typically contains the contact information of the sender. Sugar allows users to create multiple signature variations that they can insert during email composition. Optionally, users can mark one email signature as their default signature. Sugar will automatically insert the default signature when a user composes a new email, but the user has the option to delete it or replace it with a non-default signature.

For steps to insert signatures in email messages, please refer to the Using an Email Signature section of this page.

Note: You must have role access to the Emails module to view and create email signatures. For more information on roles, please refer to the Role Management documentation in the Administration Guide.

Viewing Email Signatures

To view your saved signatures, navigate to the Emails module and select "View Email Signatures" from the [Emails module tab](#) menu. Please note that you will only be able to see email signatures that you have created.

Creating Email Signatures

To create a new email signature, click the triangle on the Emails module tab and select "Create Email Signature" from the module tab menu.

Give your new signature a descriptive name (e.g. "Sugarcon Promo Signature") and compose your signature in the Signature composition area just as you want it formatted for outgoing messages. Optionally, enable the "Default" checkbox to make this your automatic signature on all new emails. Each user can have one default signature. Marking a signature as your default will uncheck the Default field on any signature you may have previously designated.

When you are satisfied with the signature you have created, click "Save" to add the signature to the Signatures dropdown on email compose views for your user. Other users cannot access the signatures that you have created.

For more information about the fields available on the email signature record, please refer to the Email Signature Fields section. For instructions on using signatures in email messages, please refer to the Using a Signature section of this page.

Email Signature Fields

The Email Signatures module contains the following fields:

Field	Description
Name	A unique and descriptive name to help users find the template
Default	Designates the user's default email signature **Note**: Each user can have one default signature. Marking a signature as your default will uncheck the Default field on any signature you may have previously designated.
Signature	The content of the email signature including any text, HTML content, and images **Note**: Use the TinyMCE functions to add formatting to the signature. For more information on using TinyMCE, please refer to the User Interface documentation. If images or advanced CSS are required in your email signature, it is highly recommended to host the images or CSS file on a publicly available hosting service and link to it in the email signature. For more information, please refer to the Using CSS in Email Templates article.
Date Created	The date the email template record was created
Date Modified	The date the email template record or

	its content was last modified
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating and using tags, please refer to the Tags documentation.

Editing Email Signatures

To edit a signature, navigate to the Emails module and select "View Email Signatures" from the Emails module tab menu. Click on the name of the signature you want to edit and adjust the content as needed. Please note that you can only view and edit the email signatures that you have created. Click "Save" to preserve your changes to the signature.

The edited signature will be available the next time you insert the signature into a new message. Any drafts that were saved with the signature before it was edited will retain the old signature. You can re-select the same signature from the draft's Signatures menu, which will replace the old version with the new one.

Sugar Email Archiving Service

Sometimes referred to as SNIP, the Sugar Email Archiving service allows users to easily archive email to Sugar records simply by sending the email to a special email address. The email archiving service monitors the email address, imports the email into your Sugar instance, and links related records without the use of a plug-in or other syncing process.

Note: Before you can use Sugar Email Archiving, an administrator must enable the service for your instance. For activation instructions, please refer to the Email documentation in the Administration Guide.

Features and Limitations

Anyone can send emails to the Sugar Email Archiving address, so the capability is not limited to users. Sugar Email Archiving will not import messages that are larger than 10 MB including attachments.

When an email record is archived via the Sugar Email Archiving service, the

email's team will default to "Global". Users with the appropriate permissions may update the Teams field after the email has been archived in Sugar.

If the sender's email client is configured to use non-English From, To, and Cc fields, forwarding emails to Email Archiving may not work. Instead, send the email to Email Archiving directly using the Cc and Bcc fields or forward the email as an attachment. For a large volume of non-English emails that need to be archived using Email Archiving, set a rule in your email application to copy the emails to the Sugar Email Archiving address.

Relating Archived Emails to Sugar Records

Sugar will scan incoming emails that are sent to the Email Archiving Service for the following relatable items:

- **From, To, and Cc fields** : The Sugar Email Archiving service scans the From, To, and Cc fields of the message and relates the email to any records it finds with a matching email address in Sugar. The archived email will appear in the Emails subpanel and History dashlet for any matching records in Sugar. Please note that Email Archiving cannot relate records based on email addresses in the Bcc field due to the field's hidden nature.
- **Message body** : The Sugar Email Archiving service scans the content in the body of the message and relates the email to any records it finds with a matching email address in Sugar. For an email address to be recognized in the body of an email, it must be preceded by "To:" and surrounded by opening and closing carets, for example, "To: <john@example.com>" or "To: John Smith <john@example.com>". The archived email will appear in the Emails subpanel and History dashlet for any matching records in Sugar.
- **Case Macro** : If an archived email's subject line contains a specially-formatted key known as the Case Macro, the message will automatically be associated with the corresponding case in Sugar's Cases module. For more information on using the case macro, please refer to the [Automatically Associating Emails With Cases](#) article.
- **Calendar invites (.ics)** : If the email contains a calendar event, Sugar will archive the email as well as create a Meeting record. Any users, contacts, or leads that share an email address with the meeting's attendees will be added as meeting invitees in Sugar.

The Sugar Email Archiving Service will relate emails to records in the following modules:

- **Accounts, Contacts, Leads** : relates emails with a matching email address
- **Cases** : relates emails containing a matching case number via [Case Macro](#)
- **Meetings** : creates meetings from emails with calendar invites; relates matching invitees

- **Opportunities** : relates emails from related contacts if the admin has enabled [Related Contacts Emails](#) for opportunities

Note: Any relationships between archived emails and custom modules must be made manually.

Sugar Email Archiving creates an implicit relationship between the email and matching records via the email addresses on the email. This implicit relationship behaves differently than an explicit relationship. For example, an email implicitly related (i.e. via Sugar Email Archiving by matching email address) to Beth Roberts' contact record would appear in her Emails subpanel just like one that is explicitly related (i.e. manually created relationship via subpanels). However, if Beth's email address is updated in Sugar, the emails created via Sugar Email Archiving will no longer appear in her subpanel since the email addresses no longer match. You can explicitly relate a contact to an email by navigating to the email's record view and selecting Beth Roberts in the email's Contacts subpanel.

Email Assignment

Like other records in Sugar, an email can only be assigned to one user. The Sugar Email Archiving service assigns emails to a user based on a match between the email address stored in the user's profile settings and an email address listed in the From, To, or CC fields. Sugar looks for users' email addresses in the From field first, then the To field, and then the CC field, and assigns the email record to the first user it finds with a matching email address. For example, if three Sugar users appear on an email, two in the To field and one in the CC field, the first user listed in the To field will be assigned the email record in Sugar.

Outgoing Email Accounts

Sugar users have the ability to [create outgoing email accounts](#) or [edit configured email accounts](#) by navigating to the Emails module and selecting "Email Settings" in the Emails module tab menu. The Outgoing Email Accounts list view will display all the outgoing email accounts which the user has access to in Sugar. Outgoing email accounts can include the default user email account, personal email accounts, as well as shared email accounts. When the user first logs in to Sugar, the primary email address on their profile is created as a placeholder outbound account. Please note that you will need to configure this email account before using it to send emails. If the admin has enabled the "[Allow users to use this account for outgoing email](#)" option in Admin > System Email Settings, you will not be able to configure the default email account and must instead utilize the system email account which will appear in the Outgoing Email Accounts list view with an asterisk to indicate that it is a system account. Each of the outgoing email account

types is described in the list below.

Note: The Outgoing Email Accounts list view does not support filtering, preview, or mass actions.

There are three types of outgoing email accounts in Sugar:

- **User Email Accounts** : User email accounts can be created by all users and can consist of the user's personal email accounts (e.g. jane@example.com) as well as any shared email accounts (e.g.support@example.com, sales@example.com). Please note that user email accounts can only be edited by the record owner. In addition, the "Allow users to configure email accounts" option must be enabled in Admin > System Email Settings in order for users to create new outgoing email accounts. Reach out to your Sugar administrator if you do not see the Create button in the Outgoing Email Accounts list view.
  - **Personal Email Accounts** : Sugar users can configure one or more personal email accounts (e.g. jane@example.com, jane.smith@mycompany.com) to send email messages through Sugar. Personal email accounts will only be available for the current user since it is assigned to their private team.
  - **Shared Email Accounts** : Shared email accounts can be created by any user and allows groups of users to send outbound email messages using the same email account (e.g. support@example.com). In order to share outgoing email accounts, the user must assign the email account to the specific team(s) who can use this account to send emails. Once created, the shared email account will appear in the Outgoing Email Accounts list view for all users belonging to at least one of the assigned teams.
- **Default User Email Account** : A default email account is automatically created by Sugar for each user and uses the primary email address stored

in the user's profile. To use this account, users need to make sure that the Username and Password fields are configured properly.
Note: The users' default email accounts may be affected by the "[Allow users to use this account for outgoing email](#)" option in Admin > System Email Settings. If the administrator has enabled the option, users will not be able to configure their default email account and must instead utilize the system email account or create a new user email account. The system email account will display in the Outgoing Email Accounts list view with an asterisk to indicate that it is a system account.

- **System Email Account** : The system's outbound email setting is configured by the administrator via Admin > System Email Settings. By default, administrators will see the system email account in the Outgoing Email Accounts list view. Though uncommon, the administrator may choose to allow users to send email using the system email account by enabling the "[Allow users to use this account for outgoing email](#)" option in Admin > System Email Settings. Once enabled, users will not be able to configure their default email account and must instead utilize the system email account or create a new user email account. In addition, users will see the system email account in the Outgoing Email Accounts list view with an asterisk to indicate that it is a system account.

Once the necessary outgoing email accounts have been configured, users will be able to send email messages through Sugar using one of the available accounts (e.g. jane@example.com, support@example.com). Please note that in order to send messages through the Sugar application, you must select "Sugar Email Client" from the Email Settings section of your user profile. For more information, please refer to the [Getting Started](#) documentation.

Note: Email messages sent from Sugar will be automatically archived and linked to existing records throughout the application.

Creating Outgoing Email Accounts

Sugar users have the ability to configure personal and shared email accounts by clicking the Create button in the Outgoing Email Accounts list view. You can also click the Copy option to duplicate an existing outgoing email account record if you are creating a another email account with similar settings.

Use the following steps to add a new outgoing user email account:

1. Navigate to the Emails module and select "Email Settings" from the module tab.
2. Click "Create". If you do not see the Create button, talk to your administrator about enabling the system email setting "[Allow users to configure email accounts](#)".

3. For Google (e.g. Gmail or Google Apps), Microsoft Exchange, or Microsoft Outlook accounts, click on the appropriate Email Provider logo to expose provider-specific fields pre-populated with their most common default settings. For accounts with any other email provider, select "Other".

Note: For Google accounts, you may be required to enable less-secure app access within your Google account. For more information, please refer to Google's help documentation.

4. Complete the following fields for your email account. All required fields are marked as such and must be completed prior to saving. If you are not familiar with these terms or their values, please check with your IT department or email provider.

- **Name** : The name of the outgoing email account that will be used to identify it in list view and will appear as the "From" name on messages sent from Sugar via this account. Defaults to the first and last name in the user's profile.
- **Email Address** : The email address used to send messages for this account. Defaults to the primary email address stored in the user's profile.
- **Server** : The web address of the external email server from which emails will be viewed in Sugar.
- **Port** : The communication port number used for connecting to the email server.
- **Transport Encryption** : Select the appropriate option from the dropdown to use Secure Socket Layer (SSL), Transport Layer Security (TLS), or no encryption (None) when connecting to the email server.
- **Use SMTP Authentication** : Select this box to require server authentication for the account. Most email servers require authentication for security purposes. By default, authentication is required for Google, Exchange, and Outlook providers. If left unchecked, the SMTP server will accept anonymous connections, which is not recommended. The following fields are displayed when

"Use SMTP Authentication" is enabled:

- **Username** : Enter the username for the external account. The username is often the email address.
- **Password** : The Password field group contains a grayed-out field that cannot be edited and the following two required fields:
  - **New Password** : Enter the account's existing password.
  - **Confirm Password** : Re-type the account's existing password. This value must exactly match the "New Password" value in order to properly authenticate.

- **Reply-To Name** : To have replies to your email sent to a name and email address other than the From name and address, populate both the Reply-To Name and Reply-To Email Address.
- **Reply-To Email Address** : To have replies to your email sent to a name and email address other than the From name and address, populate both the Reply-To Name and Reply-To Email Address.
- **Teams** : The Sugar team(s) assigned to the outgoing email account. User email accounts are assigned to the user's private team by default. Adding teams to an email account allows the users belonging to the teams to also send from the account. The shared email account will appear in the Outgoing Email Accounts list view for all users belonging to at least one of the assigned teams.

5. Once the necessary information is entered, click "Save" to preserve the changes. Sugar will automatically validate the settings and alert you if there is an error.

Though uncommon, users may be able to use the system's outgoing email server if the administrator allows it. For more information on how to configure the system's outgoing email server, please refer to the [Email](#) documentation in the Administration Guide. For more information on configuring the system outgoing email server settings and allowing users to use the system account, please refer to the [Email](#) documentation in the Administration Guide.

Editing Outgoing Email Accounts

To edit outgoing user email accounts that you created, navigate to the Emails module and select "Email Settings" from the module tab menu. Then in the Outgoing Email Accounts list view, click the pencil icon to the far right of the record's row you wish to edit. Alternatively, you can also click on the email account's name and then click the Edit button on its record view. Please note that outgoing user email accounts can only be edited by the record owner.

Note: If the administrator has exposed the system email account to users, it will be listed in the Outgoing Email Accounts list view with an asterisk and cannot be edited by regular users.

Deleting Outgoing Email Accounts

To delete an outgoing user email account that you created, navigate to the Emails module and select "Email Settings" from the module tab menu. Then in the Outgoing Email Accounts list view, click the Record Actions menu to the far right of the record's row and select "Delete". Alternatively, you can also click on the account's name and then select "Delete" from the Actions menu on its record view. Please note that outgoing user email accounts can only be deleted by the record owner.

Note: If the administrator has exposed the system email account to users, it will be listed in the Outgoing Email Accounts list view with an asterisk and cannot be deleted. In addition, the default user email account that was created when the user's record was created cannot be deleted.

Email's Direction Field

The Direction field in the Emails module specifies the direction (e.g. Outbound,

Inbound, Internal, Unknown) of the email based on the sender (e.g. user, customer) and the recipient(s) in the email message. Please note that this field is not visible on record views or as a list view column, and is available only as an available filter field in the Emails list view. Sugar automatically sets the direction for archived emails and determines the direction using the following criteria:

Direction	Sender	Recipient	Notes
Inbound	The sender is not a user/employee		
Outbound	The sender is a user/employee	At least one recipient is not a user/employee	
Internal	The sender is a user/employee	All recipients are a user/employee	
Unknown	The sender is blank		Draft emails have a direction of "Unknown".

To filter the emails by direction, simply create a filter using the Direction field then choose the value (e.g. Inbound) you wish to filter the list view by. In the example below, Sugar will return all inbound emails for Calm Sailing Inc. received in the last 30 days.

Last Modified: 2020-04-22 22:12:31

Tasks

Overview

Sugar's Tasks module is used to track to-do or action items which can be related to various Sugar records to which the task is relevant. Tasks with due dates will display a [color coding](#) on list views and dashlets to help alert users when a task is overdue or will be due soon. You can view tasks in [specialized dashlets](#) on related records as well as in your [calendar](#) to help you plan your workday and complete important action items on time. As tasks are completed, they can be [closed](#) via various convenient methods throughout Sugar. This documentation will cover information and actions specific to the Tasks module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting calls, please refer to the [Working With Tasks](#) section of this page.

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

Task Fields

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

Field	Description
Assigned To	The Sugar user assigned to the task
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the [User Interface](#) documentation for more details.
Contact Name	The contact record the task is related to

	Note: The task will appear in either the contact's Active Tasks dashlet or Inactive Tasks dashlet in the intelligence pane.
Date Created	The date the task record was created
Date Modified	The date the task record was last modified
Description	A description or other information about the task
Due Date	The date and time the task is due to be completed **Note**: The task will appear on the assigned user's Calendar per the date and time of the task.
Priority	The priority or importance of the task (e.g. High, Medium, Low)
Related to	The module and record that is related to this task **Note**: The task will appear in either the Active Tasks dashlet or Inactive Tasks dashlet of the selected module record's intelligence pane or the Activities subpanel or History subpanel (BWC modules only).
Start Date	The date and time the task is started
Status	The current status of the task (e.g. Not Started, In Progress, Completed, etc.) **Note**: Closing a task will automatically set the status to "Completed".
Subject	The subject or brief summary of the task
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the task record

Task Due Date Colors

When viewing the Tasks list view or Tasks dashlet, the due date will be highlighted in one of two colors: blue or red. This allows users to quickly recognize scheduled tasks that are either overdue or due within the next 24 hours.

Task due dates are highlighted in list view and dashlets as follows:

- **Blue** : Tasks with any status other than "Completed" with a due date in the next 24 hours.
- **Red** : Tasks with any status other than "Completed" with a due date that has passed.
- **No color** : Tasks with a status of "Completed" or with a due date 24 hours or more in the future.

Working With Tasks

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

Content Link	Description
Creating Tasks Basic Task Creation Creating via Quick CreateCreating via Subpanels Creating via Duplication Importing Tasks	The Creating Records section covers the various methods of creating new task records, including via the Create button in the Tasks module, the Quick Create menu on the upper right of every Sugar page, via the Tasks subpanel on related modules, duplication of an existing task

	record, and importing a list of tasks into Sugar using a .csv spreadsheet.
Viewing Tasks Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Dashlets Viewing via Activity StreamsViewing via Preview Viewing via Reports	The Viewing Records section describes the various methods of viewing task records, including via the Tasks list view and record view, the Recently Viewed menu in the Tasks module tab, list view dashlets showing task information, activity stream entries concerning task updates or where a user mentions a task, previewing tasks in the right-hand side panel, and reports displaying task data. **Note**: There are also specialized dashlets for tasks, which are explained in detail in the Task Dashlets section of this page.
Searching for Tasks Global Search List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to the two searching methods for locating tasks: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Tasks module.
Tasks List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview Record Actions Menu More Tasks Activity Stream Dashboards	The List View section walks through the many elements of the Tasks List View layout which contains a filterable list of all task records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Tasks list view's menus are available in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.
Tasks Record View Favorite Designation Following Designation	The Record View section walks through the many elements of the Tasks Record View layout which contains detailed

[Next or Previous Record](#) [Actions Menu](#) [Show More](#) [Subpanels](#) [Related Record Subpanels](#) [Filtering Subpanels](#) [Reordering Subpanels](#) [Activity Stream](#) [Dashboards](#)	information about a single task record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Tasks record view's menu is available in the [Record View Actions Menu](#) section of this page.
[Editing Tasks](#) [Editing Inline via Record View](#) [Editing via Record View](#) [Editing Inline via Subpanels](#) [Editing Inline via List View](#) [Mass Editing via List View](#)	The Editing Records section describes the various methods of editing existing task records, including inline via the tasks record view, in full edit mode on the record view, inline via the Tasks subpanel on related module records, inline via the Tasks list view, and via the Mass Update option on the list view.
[Deleting Tasks](#) [Deleting via Record View](#) [Deleting via List View](#) [Mass Deleting via List View](#)	The Deleting Records section describes the various methods of deleting unwanted tasks, including via the Tasks record view, an individual record's Actions menu on the Tasks list view, and the Mass Actions menu on the list view.
[Exporting Tasks](#)	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of tasks and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).
[Recalculating Calculated Values](#)	The Recalculating Calculated Values section provides instructions on utilizing the Recalculate Values list view option to update calculated field values in the module if the administrator has changed the field's formula via Admin > Studio.
[Merging Tasks](#) [Merging via List View](#)	The Merging Records section provides instructions for merging duplicate tasks which will combine field values and related records into a single task.
[Viewing Task Audit Logs](#)	The Viewing Record Audit Logs section describes the View Audit Log record view option which displays a history of changes to the task's audited fields.

[Task PDFs](#) [Downloading Task PDFs](#) [Emailing Task PDFs](#)	The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of task information as configured by an administrator via Admin > PDF Manager.
[Favoriting Tasks](#) [Favoriting via List View](#) [Favoriting via Record View](#) [Favoriting via Subpanel](#)	The Favoriting Records section describes the various methods of marking tasks as favorites, including via the Tasks list view, Tasks record view, or any Tasks subpanel appearing on the record view of a related module. Favoriting a task allows you to easily access it from list views, dashlets, or the Tasks module tab.
[Following Tasks](#) [Following via List View](#) [Following via Record View](#)	The Following Records section describes the various methods of marking tasks as "Following", including via the Tasks list view and record view. Following a task causes its activity stream updates to be included on your Home page and Tasks list view activity streams so that you can easily keep up with changes and user posts on the record.
[Sharing Tasks](#)	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the task record. If the recipient is logged into Sugar, clicking the link will bring them directly to the task's record view.

Tasks Tile View

Tile View allows users to visualize and engage with their tasks in an intuitive drag-and-drop interface. Users can drag a tile from one column to another to change its status.

To access Tile View, navigate to the Tasks list view and click on the Tile View icon next to the search bar:

For more information on using the Tile View, refer to the User Interface documentation. For information on configuring Tile View layouts, refer to the Tile View Settings documentation in the Administration Guide.

Task Menus

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

Module Tab Menus

The Tasks module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Tasks" to access the list view. Once the Tasks tab displays on the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of tasks you last viewed in the module. The Favorites menu displays the list of tasks you most recently marked as favorites.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Tasks	Opens the record view layout to create a new task
View Tasks	Opens the list view layout to search and display tasks
Import Tasks	Opens the import wizard to create or update tasks using external data

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

- The Tasks module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Tasks module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Tasks module for your entire Sugar instance. Reach out to your Sugar administrator to have the Tasks

module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

List View Menus

The Tasks [list view](#) displays all task records and allows for searching and filtering to locate specific tasks. You can view the basic details of each record within the field columns of the list view or click a task's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

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

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

Menu Item	Description
[Mass Update](#)	Mass update one or more tasks at a time
[Merge](#)	Merge one or more duplicate tasks
[Delete](#)	Delete one or more tasks at a time
[Export](#)	Export one or more tasks to a CSV file
[Recalculate Values](#)	(Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio

List View Record Actions Menu

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

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

Menu Item	Description
Preview (Eye icon)	Preview this task in the intelligence pane
Edit	Edit this task
Follow	Follow this task
Close	Close this task
Delete	Delete this task

Record View Actions Menu

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

The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this task.
Share	Share a link to this task via email. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Download PDF	Download the record's information as a PDF file. • This menu option is only visible if the administrator has created a PDF template for the Tasks module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.
Email PDF	Email the record's information as a PDF attachment. • This menu option is only visible if the administrator has created a PDF template for the Tasks

	module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Close and Create New	Close this task as "Completed" and duplicate to a new task. **Note**: This option only appears as long as the status does not equal "Completed".
Close	Close this task as "Completed". **Note**: This option only appears as long as the status does not equal "Completed".
Copy	Duplicate this task to create a new task.
View Audit Log	View a record of changes to this task.
Delete	Delete this task.

Task Dashlets

Dashlets showing task records can be added to your Home page, list view intelligence panes, and record view intelligence panes. The List View dashlet is a basic dashlet that allows you to select the Tasks module and create a filter so that the dashlet displays tasks that meet your filter criteria. For more information on list view dashlets, please refer to the Dashboards and Dashlets documentation.

Sugar also offers two dashlets with specific task-related functionality: the Active Tasks dashlet and the Inactive Tasks dashlet, which are briefly explained in the following sections.

Active Tasks Dashlet

The Active Tasks dashlet displays all tasks in a status of "Not Started", "In Progress", and "Pending Input" with the tasks broken into three tabs based on their due dates and adjacent buttons for performing actions on the tasks. When used on a related-module's record view, the dashlet becomes contextual, and only shows tasks that are relevant to the current record.

For complete information regarding the Active Tasks dashlet, please refer to the [Dashboards and Dashlets](#) documentation.

Inactive Tasks Dashlet

The Inactive Tasks dashlet displays all tasks in a status of "Completed" or "Deferred" with the tasks broken into two tabs based on their statuses and adjacent buttons for performing actions on the tasks. When used on a related-module's record view, the dashlet becomes contextual, and only shows tasks that are relevant to the current record.

For complete information regarding the Inactive Tasks dashlet, please refer to the [Dashboards and Dashlets](#) documentation.

Closing Tasks

Once a task has been completed, users can edit the Status field to "Completed"

while on the record or list view. As a more convenient option, Sugar also allows users to close tasks, which automatically sets the status to "Completed".

Please note that the Close option will only appear if the task is not already in a status of "Completed". The following sections explain several ways to close tasks in Sugar.

Closing via List View

Use the following steps to close a task via the list view:

1. Navigate to the Tasks list view by clicking the Tasks module tab.
2. Use the Module Search to find the task records you wish to close.

3. Click the Record Actions menu to the far right of the record's row and select "Close".

Closing via Record View

Use the following steps to close a task via the record view:

1. Navigate to a task's record view.
2. Select "Close" from the Actions menu.

Closing and Creating New via Record View

Use the following steps to close and duplicate a task via the record view:

1. Navigate to a task's record view.
2. Select "Close and Create New" from the Actions menu.

3. The displayed record view is pre-populated with the original task's values. By default, the new task's status is set to "Not Started". Update the necessary fields then click "Save".

Closing via Subpanels

Use the following steps to close a task from the Tasks subpanel on the record view of a related record:

1. Scroll to the Tasks subpanel on the record view of a related record.
2. Select "Close" from the Actions menu of the task record you wish to close.

Closing via Dashlet

Tasks with statuses of "Not Started", "In Progress", or "Pending Input" appear in the Active Tasks dashlet on the record views of related records. Closing a task will cause it to move to the Inactive Tasks dashlet along with deferred tasks.

Use the following steps to close a task via the Active Tasks dashlet:

1. Navigate to the Active Tasks dashlet on your Home page or a module record view's (e.g. Accounts) intelligence pane.
2. Click the appropriate tab (Due Now, Upcoming, To Do) on the dashlet, then locate the task record you wish to close.
3. Click the X button to the right of the task's row in the dashlet.

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

Once the task is closed, the task record will be moved to the Inactive Tasks dashlet and the task's status will change to "Completed".

Calendar Module and Tasks

The Calendar module displays a user's calendar including their Sugar activity records. You can view, schedule, and manage their calls, meetings, and tasks directly within the calendar, allowing you to plan your time with full access to your other scheduling commitments.

Viewing via Calendar

When tasks are created in Sugar, they appear in the assigned user's calendar based on the set due date of the task. For example, if you create a task due on December 22nd at 11:30 am and assign it to user John Smith, then the task will appear in that user's calendar per the specified due date and time. You can view the quick details of the task by clicking the "i" icon on the task record cell and view/edit the actual task record by clicking the Eye or Pencil icon in the popup

window. For more information on viewing via calendar, please refer to the [Calendar](#) documentation.

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

Creating via Calendar

There are two methods of creating tasks in the Calendar module. The first method is to create a task via the Create Task option in the Calendar module tab. This will open up the Tasks record view in edit mode to create a new task record. For more information on creating tasks, please refer to the [Creating Records](#) section of the User Interface documentation.

The second method is to create the task directly via the user's Sugar calendar using the following steps:

1. Click the Calendar module tab.
2. On the calendar view, click the cell corresponding to the date and time you wish to schedule the task. You can choose to view the calendar by Day,

Week, Month, Year, or Shared. For more information on viewing the shared calendar, please refer to the [Calendar](#) documentation.

3. When a cell is selected, a popup will appear at the top of the drawer. Select "Create a task".

4. Refer to step 2 and beyond in the [Basic Record Creation](#) section of the User Interface documentation for additional instructions about creating task records.

Editing via Calendar

Once tasks are created in Sugar, they appear in the assigned user's calendar based on the specified due date and time. You can click the "i" icon on the task record cell to view additional information regarding the task.

The Additional Details popup window displays the Pencil icon on the upper right, which opens up the Tasks record view for user's to make any changes as necessary. Click "Save" to preserve the changes made to the task record.

Additional Details ✏ ⊙ ⊗

Due Date & Time: 12/28/2017 09:00am
Priority: High
Status: Not Started

Last Modified: 2019-10-24 17:03:21

Notes

Overview

Sugar's Notes module consists of individual notes which contain text or an attached field pertinent to the related record. The Related To flex-relate field is typically set to the module and record to which the note's contents are relevant. A contact record can also be related using the Contact field which will cause the note to be displayed when viewing the contact record. Notes are also used to communicate with customers about bugs and cases via the Sugar Portal. For more information, please refer to the [Bugs](#) and [Cases](#) documentation. This documentation will cover information and actions specific to the Notes module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting notes, please refer to the [Working With Sugar Modules](#) section of this page.

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

Note Fields

The Notes module contains a number of stock fields which come out-of-the-box with Sugar. For information on using and and editing various field types, refer to the [User Interface](#) documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role access have

the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration Guide.

Field	Description
Assigned To	The Sugar user assigned to the note
Attachment	An optional file to attach to the note **Note**: The Sugar administrator can specify the maximum file size allowed to be uploaded.
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the [User Interface](#) documentation for more details.
Contact	The contact record the note is related to. **Note**: If populated, this note will show in the contact's History subpanel
Display in Portal?	Notes attached to cases, bugs, and/or knowledge base articles will display in the [portal](#) by default **Note**: Administrators can have this field disabled by default via Admin > Studio.
Note	The details and content of the note
Note Source	A system-level dropdown field that represents the origin of newly created notes. It is set to External on notes created via Portal and set to Internal on notes created in Sugar. This field is not available in Studio or the user interface and is only available in [SugarBPM](#).
Related to	The module and record that is related to this note **Note**: This will decide which module this note will show in the History subpanel
Subject	The subject or designation of the note

Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating and using tags, please refer to the [Tags](#) documentation.
Teams	The Sugar team(s) assigned to the note record

Working With Sugar Modules

While the Notes module has some features that only apply to notes, it also uses the Sidecar user interface that most Sugar modules are based on. In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to notes.

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

Note Menus

The Notes module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation.

Module Tab Menus

The Notes module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen to the right of the home cube icon. Depending on your settings, you may have to click "Show More" in order to see the Notes module tab. Click the tab to access the Notes list view. You may also click the triangle in the Notes tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of notes you most recently viewed. The Favorites menu displays the list of notes you most recently marked as favorites.

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

Menu Item	Description
Create Note or Attachment	Opens the record view layout to create a new note
View Notes	Opens the list view layout to search and display notes
Import Notes	Opens the import wizard to create or update notes using external data

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

- The Notes module may be marked as hidden in your user preferences

which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Notes module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the [Layout Options](#) section of the Getting Started documentation.

- The administrator may have disabled the Notes module for your entire Sugar instance. Reach out to your Sugar administrator to have the Notes module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration Guide.

List View Menus

The Notes [list view](#) displays all note records and allows for searching and filtering to locate specific notes. You can view the basic details of each record within the field columns of the list view or click a note's subject to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

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

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

Menu Item	Description
[Mass Update](#)	Mass update one or more notes at a time
[Merge](#)	Merge two or more duplicate notes

Delete	Delete one or more notes at a time
Export	Export one or more notes to a CSV file
Recalculate Values	(Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio

List View Record Actions Menu

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

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

Menu Item	Description
Preview (Eye icon)	Preview this note in the intelligence pane
Edit	Edit this note
Follow	Follow this note
Delete	Delete this note

Record View Actions Menu

The Notes record view displays a single note in full detail including its fields, subpanels of related records (if applicable), and activity stream. To access a note's record view, simply click a hyperlinked note name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this note
Share	Share a link to this note via email
Download PDF	Download note information as a PDF file
Email PDF	Email note information as a PDF attachment
Copy	Duplicate this note
Delete	Delete this note

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Cases

Overview

Sugar's Cases module is used to track and manage customer requests for assistance with products or services. As a case is opened, worked on, and resolved, its progress will be denoted by the Status field. Each case record may relate to other Sugar records such as calls, contacts, and bugs, making it easy to get the full picture of a customer's issues and history. If enabled, contacts can view and open cases via the Sugar Portal along with bugs and knowledge base articles. Cases can also be automatically created from incoming emails, and a case macro can be employed to automatically relate emails to existing cases. This documentation will

cover information and actions specific to the Cases module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting cases, please refer to the [Working With Cases](#) section of this page.

Users with a Sugar Serve [license type](#) can use the Service Console as their primary case workspace. Service Console is a Home page dashboard that provides a powerful work environment for customer service agents by incorporating SLAs and region-specific business hours, insightful dashlets, and a cohesive case research and action experience. For more information, refer to the [Service Console](#) documentation.

In addition, Sugar Serve provides a [stock SugarBPM™ template](#) that sets case follow-up dates on new and in-progress cases according to your organization's Service Level Agreements (SLAs). It incorportaes case and related account fields when calculating follow-up dates as well as sending email notifications and updating the case Status field in certain circumstances. Refer to the [Getting Started With SugarBPM for Sugar Serve](#) and [Stock SugarBPM - Case Follow-Up Date Management](#) articles for help configuring this process definition and your instance to work together.

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

Note: The Cases module is not available for Sugar Sell users. For more information on license types and the functionality available for each type, refer to the [User Management](#) documentation.

Case Fields

The Cases module contains a number of stock fields which come out-of-the-box with Sugar. For information on using and editing various field types, refer to the [User Interface](#) documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration Guide.

Field	Description

Account Name	The account that submitted the case **Note**: In Sugar Serve, information from a case's related account is used by the stock SugarBPM template to calculate the Follow Up Date
Assigned To	The Sugar user assigned to the case **Note**: Case owners receive an email whenever a case is assigned to them if the administrator has enabled email notifications.
Business Center Name	The business center responsible for managing this case **Note**: This field is only available to Sugar Serve users. During case creation, selecting a related account will cause the Business Center Name field to be populated automatically, on save, with the account's business center. The value can also be manually set. The selected business center is used for SugarBPM business hour calculations. For more information, refer to the Business Centers and Cases section of this page.
Case Number	An automatically incremented number to identify every case, which cannot be edited through Sugar
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
Date Created	The date the case was created
Date Modified	The date the case was last modified
Description	Explanation of the cause and details of the case when submitted
Follow Up Date	The date and time to follow up with the customer **Note**: While this value can be manually

	set, it is automatically set by the stock SugarBPM template included with Sugar Serve. For more information, refer to the [Stock SugarBPM Templates](#) documentation.
Pending Processing	A system-level checkbox field that is set to true when creating a case via inbound email or relating a case to an inbound email. It is not available in Studio or the user interface and is only available in [SugarBPM](#).
Priority	The urgency of the problem which, for Sugar Serve, is used by the [stock SugarBPM template](#) to calculate the Follow Up Date
Resolution	Results of the investigation into the problem
Resolved Date	The system-generated date and time that the Status field was set to "Closed", "Rejected", or "Duplicate"
Show In Portal	Cases created in Sugar will be visible in the [portal](#) by default **Note**: Administrators can have this field disabled by default via Admin > Studio.
Source	The method in which the case was submitted (e.g. internal, customer email, portal, etc.) **Note**: For cases created via the [portal](#), the Source field will automatically be set to "Portal".
Status	The current status of the case which, for Sugar Serve, is set by the [stock SugarBPM template](#) in some situations
Subject	A brief statement of the problem
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating and using tags, please refer to the [Tags](#) documentation.
Teams	The Sugar team(s) assigned to the case
Time to Resolution	The calculated duration in minutes from

	the moment the case was created until its Status field was set to "Closed", "Rejected", or "Duplicate" **Note**: The calculation is a simple count of minutes that does not incorporate business hours from the related business center record.
Type	Type of categorization that this case falls into
Work Log	Freeform field to add activities and notable events while working on the case

Working With Cases

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

Content Link	**Description**
Creating Cases Basic Case Creation Creating via Quick Create Creating via Subpanels Creating via Duplication Importing Cases	The Creating Records section covers the various methods of creating new case records, including via the Create button in the Cases module, via the Quick Create menu on the upper right of every Sugar page, via the Cases subpanel on related module records, via duplication of an existing case record, and via importing a list of cases into Sugar using a .csv spreadsheet.
Viewing Cases Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Dashlets Viewing via Activity Streams Viewing via Preview Viewing via Reports	The Viewing Records section describes the various methods of viewing case records, including via the Cases list view and record view, the Recently Viewed menu in the Cases module tab, list view dashlets showing case information, activity stream entries concerning case updates or where a user mentions a case, previewing cases in the right-hand side panel, and reports displaying case data.

[Searching for Cases](#) [Global Search](#) [List View Search](#) [Creating a Filter](#) [Saving a Filter](#)	The Searching for Records section provides an introduction to the two searching methods for locating cases: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Cases module.
[Cases List View](#) [Total Record Count](#) [Create Button](#) [List View Search](#) [Checkbox Selection](#) [Mass Actions Menu](#) [Favorite Designation](#) [Column Reordering](#) [Column Resizing](#) [Column Sorting](#) [Column Selection](#) [Preview](#) [Record Actions Menu](#) [More Cases](#) [Activity Stream](#) [Dashboards](#)	The List View section walks through the many elements of the Cases List View layout which contains a filterable list of all case records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Cases list view are described in the [List View Mass Actions Menu](#) and [List View Record Actions Menu](#) sections of this page.
[Cases Record View](#) [Favorite Designation](#) [Following Designation](#) [Next or Previous Record](#) [Actions Menu](#) [Show More](#) [Subpanels](#) [Related Record Subpanels](#) [Filtering Subpanels](#) [Reordering Subpanels](#) [Activity Stream](#) [Dashboards](#)	The Record View section walks through the many elements of the Cases Record View layout which contains detailed information about a single case record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Cases record view are described in the [Record View Actions Menu](#) section of this page. **Note**: When linking a record via the Contacts subpanel, the Search and Add Contacts drawer will automatically be filtered to only display contact records associated with the case's parent account.
[Editing Cases](#) [Editing Inline via Record View](#) [Editing via Record View](#) [Editing Inline via Subpanels](#) [Editing Inline via List View](#)	The Editing Records section describes the various methods of editing existing case records, including inline via the Cases record view, in full edit mode on the record view, inline via the Cases

[Mass Editing via List View](#)	subpanel on related module records, inline via the Cases list view, and via the Mass Update option on the list view.
[Deleting Cases](#) [Deleting via Record View](#) [Deleting via List View](#) [Mass Deleting via List View](#)	The Deleting Records section describes the various methods of deleting unwanted cases, including via the Cases record view, an individual record's Actions menu on the Cases list view, and the Mass Actions menu on the list view.
[Exporting Cases](#)	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of cases and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).
[Recalculating Calculated Values](#)	The Recalculating Calculated Values section provides instructions on utilizing the Recalculate Values list view option to update calculated field values in the module if the administrator has changed the field's formula via Admin > Studio.
[Finding Duplicate Cases](#)	The Finding Duplicate Records section provides instructions for locating duplicate case records. If searching on matching fields (e.g. Subject) identifies one or more duplicates, they can be merged into a single record.
[Merging Cases](#) [Merging via List View](#)	The Merging Records section provides instructions for merging duplicate cases which will combine field values and related records into a single case.
[Viewing Cases Historical Summaries](#)	The Viewing Record Historical Summaries section describes the Historical Summary record view option which displays quick details of the case record's related calls, meetings, emails, notes, and tasks.
[Viewing Cases Audit Logs](#)	The Viewing Record Audit Logs section describes the View Audit Log record view option which displays a history of changes to the case's audited fields.
[Cases PDFs](#) [Downloading Cases PDFs](#)	The Record PDFs section provides instructions for these record view

[Emailing Cases PDFs](#)	options which allow you to download or email .pdf files of case information as configured by an administrator via Admin > PDF Manager.
[Favoriting Cases](#) [Favoriting via List View](#) [Favoriting via Record View](#) [Favoriting via Subpanel](#)	The Favoriting Records section describes the various methods of marking cases as favorites, including via the Cases list view, Cases record view, or any Cases subpanel appearing on the record view of a related module. Favoriting a case allows you to easily access it from list views, dashlets, or the Cases module tab.
[Following Cases](#) [Following via List View](#) [Following via Record View](#)	The Following Records section describes the various methods of marking cases as "Following", including via the Cases list view and record view. Following a case causes its activity stream updates to be included on your Home page and Cases list view activity streams so that you can easily keep up with changes and user posts on the record.
[Sharing Cases](#)	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the case record. If the recipient is logged into Sugar, clicking the link will bring them directly to the case's record view.

Cases Tile View

Tile View allows users to visualize and engage with their cases in an intuitive drag-and-drop interface. Users can drag a tile from one column to another to change its status.

To access Tile View, navigate to the Cases list view and click on the Tile View icon next to the search bar:

For more information on using the Tile View, refer to the User Interface documentation. For information on configuring Tile View layouts, refer to the Tile View Settings documentation in the Administration Guide.

Case Menus

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

Module Tab Menus

The Cases module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Cases" to access the list view. Once the Cases tab displays on the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important operations within the module. The Recently Viewed menu displays the list of cases you most recently viewed. The Favorites menu displays the list of cases you most recently marked as favorites.

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

Menu Item	Description
Create Case	Opens the record view layout to create a new case
View Cases	Opens the list view layout to search and display cases
View Case Reports	Displays existing reports based on the Cases module
Import Cases	Opens the import wizard to create or update cases using external data

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

- The Cases module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your

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

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

List View Menus

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

List View Mass Actions Menu

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

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

Menu Item	Description
Mass Update	Mass update one or more cases at a time
Merge	Merge two or more duplicate cases

Delete	Delete one or more cases at a time
Export	Export one or more cases to a CSV file
Recalculate Values	(Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio

List View Record Actions Menu

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

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

Menu Item	Description
Preview (Eye icon)	Preview this cases in the intelligence pane
Edit	Edit this case
Follow	Follow this case
Delete	Delete this case

Record View Actions Menu

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

The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this case.
Share	Share a link to this case via email. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Download PDF	Download the record's information as a PDF file. • This menu option is only visible if the administrator has created a PDF template for the Cases module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.
Email PDF	Email the record's information as a PDF attachment. • This menu option is only visible if the administrator has created a PDF template for the Cases module via Admin > PDF

	Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Create Article	Converts information from the case to the record view of a Knowledge Base article. Please refer to the Knowledge Base documentation for more information.
Find Duplicates	Locate potential duplicates of this case.
Copy	Duplicate this case to create a new case record.
Historical Summary	View a historical summary of activities (e.g. calls, meetings, etc.) related to this case.
View Audit Log	View a record of changes to this case.
Delete	Delete this case.

Business Centers and Cases

Business centers, available exclusively to Sugar Serve and Sugar Sell users, represent your company's centers of operation and specify a time zone, operating hours, and holidays so that a concept called "Business Hours" can be leveraged in SugarBPM. Each case's selected business center can be used for SugarBPM business hour calculations. Sugar Serve's stock SugarBPM template uses each case's related business center to calculate and set the Follow Up Date field. Please keep in mind that if a case does not specify a business center at the point of creation, the stock SugarBPM template for Sugar Serve will terminate the process without calculating a follow up date. If your organization does not wish to specify various business centers on accounts and cases, the stock templates can be modified to use a static business center. Refer to the Getting Started With SugarBPM for Sugar Serve and Stock SugarBPM - Case Follow-Up Date Management articles for help configuring the stock template and your instance to work together.

There are several ways a case can have its business center set. As best practice, each account in your Sugar instance should have its Business Center Name field set. Then, during case creation, the user sets the case's Account Name field and, on save, the account's business center is copied over to the new case. A case's Business Center Name field can also be set manually while creating or editing the case. Once the field is populated with a value, it will not be automatically overwritten by a related account.

Note: Cases that were created before migrating to Sugar Serve will have blank Business Center Name fields until each is edited and resaved. On save, the related account's business center, if specified, will be copied over the case's blank value.

Emails and Cases

Emails offer important functionality for working with cases in Sugar. Inbound emails can **automatically generate new cases**. Once the case exists, Sugar can automatically relate emails to a relevant case when the **case macro** is used. Emails can also be manually related to cases using the email's Related To field. These relationships allow the case's record view to display all relevant email correspondence in the **Emails subpanel** and **History dashlet**.

Creating Cases via Inbound Email

Creating cases via emails provides users with added convenience in the case creation process and helps expedite the amount of time before the support team can begin working on the issue. Cases can be automatically created when emails are sent to a group mailbox account which is monitored by Sugar.

Administrators can create group mail accounts via Admin > Inbound Email. Group mail accounts periodically poll an email account for new emails and import the emails into Sugar. The group mail account can be configured to automatically create a new case for each incoming email as well as to send an automatic reply email including the generated case's number. For more information, please refer to the **Email** documentation in the Administration Guide.

Email Case Macro

Sugar has the ability to automatically relate emails to their relevant cases using a case macro. The case macro is placed in the subject line of the email and contains the case number. Administrators have the ability to alter the macro's format via Admin > Inbound Email, but the default format is "[CASE:{number}]". The

formatting of the macro in email subjects is imperative for Sugar to properly create the relationship. For example, a valid email subject line using the default macro would be "Re: [CASE:123] System not responding". For more information on configuring the case macro, please refer to the [Email](#) documentation in the Administration Guide.

When Sugar automatically relates an email to a case because of a case macro match, the case will be set in the email's Related To field. When viewing the case in record view, the email will appear in both the [History dashlet](#) and [Emails subpanel](#).

Sugar will recognize the case macro and automatically relate the email to the relevant case for any email entering Sugar in the following ways:

- **Group mail account** : A group mail accounts is a monitored inbound mailbox which is created via Admin > Inbound Email. This is a mailbox on your company's mail server that Sugar is granted the ability to read. For example, creating "support@mycompany.com" as a group mail account means that any email with "support@mycompany.com" in the To or CC list will be checked for a case macro and automatically related to the case in Sugar. Support representatives can CC the address when corresponding with customers to have the emails automatically archived and related to the case in Sugar. Please note that if the account is configured to not automatically import emails, the relationship to the case will not be formed until a user imports it from the group inbox in the Emails module. //mention on Admin Emails documentation. For more information on configuring a group mail account, please refer to the [Email](#) documentation in the Administration Guide.
- **Sugar Email Archiving** : Sugar Email Archiving must be configured and enabled by administrators in Sugar via Admin > System Email Settings. Once configured, an email address will be generated that is specific to your instance of Sugar. When this email address receives an email, it scans the email for any email addresses. The email is then imported into Sugar, where the email is associated with any contact, lead, etc. containing an email address on the email. When a case macro is included in the email's subject, Sugar will also relate the email to the referenced case. For more information on setting up Email Archiving, please refer to the [Email](#) documentation in the Administration Guide.
- **Sent from within Sugar** : Composing and sending an email from anywhere within Sugar, including via the Emails module, clicking an email address on any record, from the History dashlet, etc., will cause Sugar to automatically search the subject for a case macro and relate the email to the relevant case. For more information on composing emails within Sugar, please refer to the [Emails](#) documentation.

Emails Subpanel

The Emails subpanel in the Cases module displays emails which are associated with the case record in a variety of ways:

- **Related to the case** : If the case is selected in the email's Related To field, the email and case are related, and the email will appear in the case's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the [Emails](#) documentation.
- **Related to the case's related contacts** : If the email is related, either explicitly or implicitly, to a contact record which is related to the case, the email will appear in the case's Emails subpanel and History dashlet.
    - **Note**: Administrators can enable or disable a case from displaying related contact emails via Admin > Related Contacts Emails. For more information, please refer to the [Emails](#) documentation in the Administration guide.

The Emails subpanel allows the following functions to be performed:

- **Email Details** : To view the details of an email, click the subject to open it in detail view.
- **Record Count** : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- **Collapse or Expand** : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
    - **Note:** To send email from Sugar, users must configure their outbound email server via [Emails > Email Settings](#) or, if using the system email account to send email, the system's outbound email server must be configured by an administrator in [Admin > System Email Settings](#).
    - **Note**: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration Guide.
- **Column Widths** : Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- **Column Sort** : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).
- **Compose a New Email** : Click the Plus button on the upper right of a

subpanel to create a new email with, by default, both an implicit and explicit relationship to the case you are currently viewing. The email will automatically select the case in the Related To field.

- **Note**: Because creating a new related record opens a drawer on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.

- **More Records** : By default, Sugar displays up to five records in each subpanel, though administrators can alter the number via Admin > System Settings as described in the [System](#) documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g. "More Emails...") at the bottom of the subpanel to load the next set of records.

Sugar Portal and Cases

The Sugar Portal allows customers to view their organization's cases as well as submit cases directly to Sugar. Please note that customers have to be registered users of the portal in order to be able to submit cases to Sugar. For more information on enabling and configuring the portal, please refer to the [Sugar Portal](#) documentation. For information on using the portal, please refer to the [Portal Deployment User Guide](#) and [Portal User Guide](#) documentation.

Note: When cases are created via the [portal](#), the Source field in the case's record view will automatically be set to "Portal" to indicate that the case originated from the portal.

In addition to being used by your customers to view and submit cases, the Sugar Portal can also be used as a method of communicating about cases between customers and your organization. Utilizing the portal this way ensures that all case-related communications between your users and contacts are stored in Sugar. This communication is conducted via related note records which can be created by both Sugar users and portal-enabled contacts. Sugar users can create and add notes to

the case via the Notes subpanel on the case's record view in Sugar. Please note that cases created in Sugar will automatically appear in the portal as the Show in Portal checkbox is enabled by default in the case's record view. But administrators can have this field disabled by default via Admin > Studio. Customers can easily add notes to the case as well by clicking the Add a Note button on the case's record view in the portal. When a customer adds a note via the portal, the note record will appear in the Notes subpanel of the case's record view in Sugar. Likewise, when a Sugar user adds a note to a case in Sugar, the note record will appear in the Notes panel of the case's record view in the portal. Please keep in mind that notes attached to cases will automatically appear in the portal as the Display in Portal checkbox is enabled by default in the note's record view. But administrators can have this field disabled by default via Admin > Studio. These notes will only be visible to other portal users within the customer's organization.

Contacts and Cases

On a case's record view, the Contacts subpanel is uniquely configured with an intelligent filter. Sugar presumes that any contacts related to a case will belong to the account already related to the case. Therefore, a filter for the case's account is automatically applied to search results in the Contacts subpanel.

The available contacts are automatically filtered to show those related to the case's account:

In the event that a case should be linked to a contact from a different account, you may override the default account filter by clicking on the X next to the account name filter in the search bar or by removing the filter line item:

Knowledge Base Articles and Cases

You can create Knowledge Base articles based on a bug or case. This is particularly useful when the bug fix or situation will not be resolved until a later date, but a workaround currently exits. Simply click "Create Article" in the Case record view's Actions menu. The Knowledge Base record view layout will open and include all of the relevant fields for your organization's articles. For more information on creating knowledge base articles, please refer to the [Knowledge Base](#) documentation.

In order for an article to be visible in the Sugar Portal, the article must meet both of the following requirements:

- External Article = Checked
- Status = Published

Note: If either of these conditions is not met, the article will not be visible in the Sugar Portal.

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Knowledge Base

Overview

Sugar's Knowledge Base module provides the ability to create, maintain, and publish information in the form of articles. Knowledge base articles can cover a variety of topics such as troubleshooting or frequently asked questions. When used for internal purposes, articles can be accessed via the Sugar instance by Sugar users within your organization. When needed for external purposes, articles can

also be published to the [Sugar Portal](), providing visibility for customers or other portal users. Articles can be rated based on their usefulness by both internal and external readers to help you determine which articles should be improved or updated and which should be promoted as valuable information. As you work to improve articles, you can create revisions to keep a history of versions as well as to make changes without immediately affecting published content. Articles can also be localized to reach new audiences using a variety of languages. This documentation will cover information and actions specific to the Knowledge Base module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting accounts, please refer to the [Working With Sugar Modules]() section of this page.

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

Article Fields

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

Field	Description
Active Revision	Denotes the most up-to-date, unpublished revision of an article. This box is automatically set when a new revision is created for an unpublished article so that only the newest revision will have it checked. Only revisions with "Active Revision" checked will appear in the Knowledge Base list view. **Note**: If a revision is published, it will retain the Active Revision designation until a subsequent revision is published in its place.
Approved By	The Sugar user appointed to approve the article

	Note: When setting an article's status to "Approved", the Approved By field will automatically be populated with your name.
Attachments	External files uploaded to the article which can be downloaded from the article via Sugar Portal
Author	The Sugar user who owns the article Note: The author defaults to the current user.
Body	The HTML content of the article
Category	The category, or topic, the article belongs to
Created By	The Sugar user who created the article
Date Created	The date that a user created the article
Date Modified	The last date that a user modified the article
Description	A brief description of the article's content
Expiration Date	The date on which the article information expired or will expire in the future Note: The status for published articles will automatically change to "Expired" on the specified expiration date.
External Article	Indicates whether an article should be visible through the Sugar Portal Note: This field must be in a checked state for an article to be visible through the Sugar Portal.
View Count	How many times the published article has been viewed either via the Sugar instance or Sugar Portal
Language	The language used in the article
Modified By	The Sugar user who last modified the article
Publish Date	The date the article was published or will be published in the future Note: The Publish Date field will automatically default to today's date when an article's status is set to

	"Published".
Related Case	The case record that inspired and is associated with the article **Note**: <u>Creating an article from a case</u> causes the case to automatically populate this field.
Status	The current status of the article (e.g. Draft, Expired, In Review, Published) **Note**: The Status field must be set to "Published" for an article to be visible through the Sugar Portal.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating and using tags, please refer to the <u>Tags</u> documentation.
Teams	The Sugar team(s) assigned to the article
Title	The name of the article **Note**: This field will be visible to readers when the article is published.

Article Statuses

When viewing an article's record view or the Knowledge Base list view, the Status field will show a different colors for each status. Administrators have the ability to configure the status values via Admin > Dropdown Editor. For more information on configuring the status values, please refer to the <u>Developer Tools</u> documentation in the Administration guide.

Please note that the below values are only guidelines for defining your status and that you can skip one or more statuses based on your organization's needs.

Color	Status	Label	Description
White	Draft	Draft	The article is currently undergoing changes
Yellow	In Review	In Review	The article is being reviewed by the

			designated approver **Note**: When the status changes to "In Review", a notification email is automatically sent to the user designated in the Approver field.
Blue	Approved	Approved	The article has been approved for publish
Green	Published	Published	The article is live in the knowledge base
Gray	Expired	Expired	The article's expiration date is in the past **Note**: The status of published articles will automatically change to "Expired" on the specified expiration date, but they will remain visible in the knowledge base.

Working With Sugar Modules

While the Knowledge Base module has some features that only apply to knowledge base records, it also uses the Sidecar user interface that most Sugar modules are based on. In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to knowledge base articles.

General Instructions for Working With Sugar Modules	Knowledge-Base-Specific Instructions
Use the links below to navigate to the User Interface page which covers topics	When Knowledge-Base-specific help exists for each topic, use the links below

generic to many Sugar modules.	to navigate to sections of the current page.
[Creating Records](#)	[Creating Articles via Cases](#) [Article Templates](#) [Creating Categories](#)
[Viewing Records](#)	[Viewing Published Articles by Category](#)
[Searching for Records](#)	[Article Categories](#)
[List View](#)	[List View Mass Actions Menu](#) [List View Record Actions Menu](#) [Categories List View](#)
[Record View](#)	[Record View Actions Menu](#)
[Intelligence Pane](#)	[Viewing Article Ratings](#) [Viewing Useful Published Articles](#) [Published Articles in Other Languages Dashlet](#)
[Editing Records](#)	[Publishing Articles](#) [Article Attachments](#) [Article Localizations](#) [Article Revisions](#) [Renaming Categories](#) [Moving Categories](#)
[Deleting Records](#)	[Deleting Revision Articles](#) [Deleting Categories](#)
[Viewing Record Audit Logs](#)	
[Record PDFs](#)	
[Favoriting Records](#)	
[Following Records](#)	
[Sharing Records](#)	
[Using the TinyMCE Text Editor](#)	

Article Menus

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

Module Tab Menus

The Knowledge Base module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Knowledge Base" to access the list view. Once the Knowledge Base tab is visible in the navigation bar, you may click the triangle in the tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of articles you most recently viewed. The Favorites menu displays the list of Knowledge Base records you most recently marked as favorites.

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

Menu Item	Description
Create Article	Opens the record view layout to create a new article
Create Template	Opens the record view layout to create a new template **Note**: This option is only available to administrators.
View Articles	Opens the list view layout to search and display articles
View Categories	Opens the list view layout to search and display categories
View Templates	Opens the list view layout to search and display templates **Note**: This option is only available to

	administrators.
[Settings](#)	Opens the Knowledge Base language-configuration settings **Note**: This option is only available to administrators.

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

- The Knowledge Base module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Knowledge Base module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the [Layout Options](#) section of the Getting Started documentation.
- The administrator may have disabled the Knowledge Base module for your entire Sugar instance. Reach out to your Sugar administrator to have the Knowledge Base module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

List View Menus

The Knowledge Base [list view](#) displays all knowledge base records and allows for searching and filtering to locate specific articles. You can view the basic details of each record within the field columns of the list view or click an article's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

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

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

Menu Item	Description
Mass Update	Mass update one or more articles at a time
Delete	Delete this article

List View Record Actions Menu

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

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

Menu Item	Description
Edit	Edit this article
Create Localization	Copy this article in order to adapt it for a different audience via another language

Create Revision	Create a new or corrected version of the original article
Follow	Follow this article
Delete	Delete this article

Record View Actions Menu

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

The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this article.
Create Localization	Copy this article in order to adapt it for a different audience via another language.
Create Revision	Create a new or corrected version of the original article
Share	Share a link to this article via email. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.

Download PDF	Download the record's information as a PDF file. • This menu option is only visible if the administrator has created a PDF template for the Knowledge Base module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.
Email PDF	Email the record's information as a PDF attachment. • This menu option is only visible if the administrator has created a PDF template for the Knowledge Base module via Admin > PDF Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Copy	Duplicate this article.
View Audit Log	View a record of changes to this article's fields.
Delete	Delete this article.

Sugar Portal and Articles

The Sugar Portal allows your customers and partners to read and vote on the usefulness of knowledge base articles.

Note: Only registered users of your Sugar instance's portal can log in to view and rate articles. For more information on enabling and configuring the portal and portal users, please refer to the Sugar Portal documentation. For information on

using the portal, please refer to the [Portal Deployment User Guide](#) and [Portal User Guide](#) documentation.

To make an article visible in portal, enable the article's "External Article" checkbox, specify an Expiration Date for a future date, and ensure that the article's status is "Published".

Publishing Articles

Publishing a completed article allows you to make it visible on the Sugar Portal for your customers and others outside of your Sugar users to view. For knowledge base consumers within your organization who are Sugar users, publishing also changes the article's status and designates that version as the active revision, making it available in the knowledge base list view until a subsequent revision is published. This enables your internal users to access knowledge base content within Sugar by browsing the Knowledge Base Categories & Published Articles dashlet or the Knowledge Base list view.

Articles can be published manually or scheduled to be published automatically on a future date. Publishing will check the article's Active Revision checkbox, making it available in the Knowledge Base list view even if a related revision was previously considered the active revision. Once an article has been published, the published

version will retain the Active Revision designation when new revisions are created. Only when another revision is published in its place will the Active Revision designation be transferred. If an article is already published, publishing a related revision will also cause the original article's status to be changed to "Expired". For more information about revisions, please refer to the [Article Revisions](#) section of this page.

Publishing Articles Immediately

To publish an article, simply edit the Status field to "Published" and save the record. If you want the article to be visible in the Sugar Portal, make sure the External Article box is checked. The Publish Date field will automatically set to today's date.

Scheduling a Future Publish

To schedule an article to publish in the future, set the Publish Date field to a date in the future, change the the Status field to "Published", and save the record. If you want the article to be visible in the Sugar Portal, make sure the External Article box is checked. On the specified publish date, the article's status will change to "Published" and the article will automatically become visible.

Viewing Published Articles by Category

While the Knowledge Base list view allows you to locate articles using traditional search, filter, and sorting, Sugar also allows you to navigate the hierarchical structure of categories to locate published articles. The Knowledge Base Categories & Published Articles dashlet can be added to the Knowledge Base list view and record view intelligence panes. When it is included on the Knowledge Base record view and you are viewing a published article, it will automatically open to display the current article. This is a convenient way to confirm the placement of a published article in your category hierarchy.

Folder icons represent categories while document icons represent articles. Blue folders indicate that a category contains child categories or published articles; clicking the blue folder will expand it to display the category's contents. White folders, on the other hand, may not be expanded since they indicate that the category has no child categories or published articles. To collapse an expanded category, simply click the open folder icon. Clicking an article's name will open the article in record view.

Creating Articles via Cases

Sugar allows you to create an article based on the details of a case record. This is useful when a resolution to a problem is documented in a case. Creating an article from such records enables you to make this information available without manually copying from the case. The new article's Title field is based on the case's Subject field, and the article's body is automatically populated with the case's number, subject, description, and resolution. The case will automatically be set in the new article's Related Case field. For more information on working with cases, please refer to the Cases documentation.

Use the following steps to create an article from a case record:

1. Update the necessary fields and then click "Save".

- Navigate to a case's record view.
- Select "Create Article" from the Actions menu.

Article Templates

Administrators have the ability to create templates to improve consistency or ease access to common or brand elements across your organization's knowledge base. Knowledge Base templates can contain text, HTML content, and images including embedded .jpg or .png image files. Existing templates can then be used by regular users when creating articles to improve article consistency and quality while reducing the amount of time they must spend. For more information how administrators can work with article templates, please refer to the [Knowledge Base Administration](#) documentation in the Administration Guide.

Applying Templates to Articles

You can apply an existing template when creating or editing a Knowledge Base article. From the article's record view, click on the Templates button located above the toolbar in the Body field. A Search and Select drawer will appear where you can choose the desired template record. The selected template's content will then appear in the Body field of the knowledge base article.

Note: If the Body field already contains content prior to selecting a template, you will receive a message requesting confirmation before the selected template can be applied. Select "Cancel" to disregard the template or "Confirm" to overwrite any existing content with the template's content.

Article Ratings

Reader feedback is important to gather and consider when working on knowledge base articles. In Sugar, both internal and external users have the ability to vote whether an article is useful or not. Internal users will find the Useful and Not Useful buttons on the article's record view. Sugar Portal users will find the same icons when viewing the article in the portal. Each time a new revision is created, it starts with zero votes, effectively wiping the slate for your improved or updated content.

Expiration Date

2015-07-22

Show less

 Not Useful   Useful

Related ▾ All   Filter All Records Search...

Viewing Article Ratings

As users vote an article as useful or not useful, the clicks are tallied within Sugar and can be viewed via a dashlet on the article's record view. The Usefulness for Articles dashlet may be added to the Knowledge Base record view's intelligence pane to display the aggregated usefulness of the current article. It totals the Useful and Note Useful votes the article has received and shows the percentage of Useful votes on top of a visual depiction of the ratio. The red portion represents Not Useful votes while the Useful votes are shown in green. Hovering on the green or red portions displays the exact percentage and number of corresponding votes.

Viewing Useful Published Articles

The Most Useful Published Knowledge Base Articles dashlet displays a list of top-rated published articles based on usefulness ratings and view count. Article usefulness is tallied via clicks on the Useful and Not Useful icons. The view count is the total number of views an article has received as shown in the View Count

field. This dashlet displays the top three articles in descending order according to their rating. Click "More most useful published knowledge base articles" at the bottom of the dashlet to see additional articles. To view the details of an article listed in this dashlet, click on the article's name to navigate to its record view.

Article Attachments

Articles can include attached files which will then be available for download by the article's viewers. In an article's record view, one or more files can be uploaded to the Attachments field. Then, when users view the published article, they will have the option to download a single attachment by either clicking the pill that contains the name of the attached file or by clicking "Download".

When multiple attachments exist on a single article, users viewing the article will have the option to download a single attachment or all attachments at once. They may click the pill that contains the name of the single file for download or click "Download All" to download a .zip file containing all of the attachments to their computer.

Article Localizations

A localization is a copy of an article that has been adapted for a different audience, usually via translation to another language. Administrators must first add desired languages to the Knowledge Base module as described in the [Knowledge Base Administration](#) documentation. Once languages are configured in your instance, users may create localizations which will copy all populated fields from the original article except for the Status and Language fields. This allows users to re-write the article's contents in various languages to accommodate different target audiences.

Note: If an administrator deletes a language from the Knowledge Base module's Settings page, all localization articles associated with the deleted language will also be deleted.

Creating Localization Articles

A localization article can be created from the Knowledge Base list view, the article's record view, or the Localizations subpanel. There are many ways users can create a new localization:

- To create a localization article from a Knowledge Base article's record view, click the Actions menu and select "Create Localization".

- To create a localization article from the Knowledge Base article list view,

click the article row's Actions menu and select "Create Localization".

- To create a localization article from the [Localizations subpanel](#) on a Knowledge Base article's record view, click the Plus icon.

A drawer will appear with a copy of the original article details except for the Language and Status fields. The Status field will automatically be set to "Draft". Users should choose the appropriate language and, optionally, edit the status and any other desired field. Clicking "Save" will finalize the new localization article, and it will appear within the Knowledge Base list view and on the parent article's record view within the Localizations subpanel.

Localizations Subpanel

A localization article is a copy of an article that has been adapted for a different audience via translation to another language. The Localizations subpanel displays all localizations related to the article and allows the following operations to be performed:

- **Localization Details** : To view the details of a related localization article, click the article's name in the subpanel to open it in record view.
- **Record Count** : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of localizations currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more localizations than currently displayed. Click the hyperlinked number to see the total count of related records.
- **Collapse or Expand** : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
    - **Note**: Administrators can choose to disable the sticky feature and collapse all subpanels by default via Admin > System Settings. For more information, please refer to the User Interface section of the System documentation in the Administration guide.
- **Column Widths** : Place your cursor on the column divider and, when the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- **Column Sort** : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).
- **Create a New Localization** : Click the Plus button on the upper right of a subpanel to create a new localization for the article you are currently viewing.
    - **Note**: Because creating a new related record opens a draw on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- **Favorites Designation** : Click the star on the left of a record's row to toggle it as a favorite. A dark grey star indicates that the record is a favorite while a white star indicates it is not. For more information, please refer to the User Interface page.
- **Hyperlink Fields** : Blue field values, such as record names, may be clicked to open the record in record view. Record view provides a complete picture of the record and is described in detail in the User Interface page. Email addresses also appear in blue and can be clicked to compose an email to that recipient.
- **Record Actions Menu** : Click the triangle on the right of a record's row to access the Record Actions Menu which includes the following options:
    - **Preview** : To preview a record by displaying its fields and activity stream in the right hand side drawer, click the Eye icon to the far right of the record's row. For more information, please refer to the User Interface page.
    - **Create Revision** : To create a new revision of the localized article, choose "Create Revision" from the actions menu on the far right of

the record's row, then complete the record view layout and click "Save".

- **Edit** : To inline edit the record directly within the subpanel, choose "Edit" from the Actions menu on the right of the record's row and click "Save" to preserve the changes.

- **More Records** : By default, Sugar displays up to five records in each subpanel though administrators can alter the number via Admin > System Settings as described in the [System](#) documentation in the Administration. If additional related records exist, click "More <Module Name>..." (e.g. "More Accounts...") at the bottom of the subpanel to load the next set.

Published Articles in Other Languages Dashlet

The Published Articles in Other Languages dashlet displays all published localization articles related to the current article you are viewing. From this dashlet, you can view who created each localization and when they created it, as well as which language is associated to each localization via the language code icon located to the right of the article's name. This two-letter icon corresponds with the language code you administrator has specified in the [Settings](#). To access an article's record view, click on the article's name directly from the dashlet.

Article Revisions

As you improve or update your knowledge base content, Sugar allows you to create revisions. Revisions are a set of articles that are versions of the same content. They allow you to keep a history of past versions as well as to make content changes without affecting the published version. One revision of each set of related revisions will be designated as the active revision using the Active Revision checkbox. Only article revisions with the Active Revision field checked are displayed in the Knowledge Base list view while the others will only be visible in the Revisions subpanel. If an article is not yet published, creating a new revision will cause the Active Revision designation to transfer to the newest revision. Once an article has been published, the published version will retain the Active Revision designation when new revisions are created. Only when another revision is published in its place will the Active Revision designation be transferred. For more information about how publishing affects revisions, please refer to the [Publishing Articles](#) section of this documentation.

Creating Revision Articles

When a revision is created, it duplicates all fields from the original article except for the Status field, which will default to "Draft". Please note that the Date Created field of all revisions will match the date the original article was created. The Date Modified fields will, however, reflect the most recent edit of the particular revision. A revision can be created from the Knowledge Base list view, the article's record view, the Revisions subpanel, or the Localizations subpanel.

To create a revision from an article's record view, click the Actions menu and select "Create Revision".

To create a revision from the list view, click the record Actions menu and select "Create Revision".

To create a revision from the [Revisions subpanel](#), click the Plus icon.

To create a revision from the [Localizations subpanel](#), click the record Actions menu and select "Create Revision".

Deleting Revision Articles

Deleting an article from the Knowledge Base list view only deletes the active revision. Another revision, if available, is then promoted to be the active revision. In order to delete an article revision which is not marked as the active revision, you must click on its name in the revisions subpanel, then select "Delete" in the record view's actions menu.

Revisions Subpanel

The Revisions subpanel is available on each article's record view and displays all revisions related to the article. The subpanel allows the following operations to be performed:

- **Revision Article Details** : To view the details of a related revision, click the article's name in the subpanel to open it in record view.
- **Record Count** : Subpanel headers display the total count of related revisions (e.g. "5 of 6+") next to the module name. The count captures the number of revisions currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more revisions than currently displayed. Click the hyperlinked number to see the total count of related revisions.
- **Collapse or Expand** : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
    - **Note**: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration Guide.
- **Column Widths** : Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- **Column Sort** : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).

- **Create a New Revision** : Click the Plus button on the upper right of the subpanel to create a new revision for the article you are currently viewing.
  - **Note**: Because creating a new revision opens a draw on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- **Favorites Designation** : Click the star on the left of a revision's row to toggle it as a favorite. A dark grey star indicates that the revision is a favorite while a white star indicates it is not.
- **Record Actions Menu** : Click the triangle on the right of a revision's row to access the Record Actions Menu which includes the following options:
  - **Preview** : To preview a revision by displaying its fields and activity stream in the right hand side drawer, click the Eye icon to the far right of the revision's row.
  - **Edit** : To inline edit the revision directly within the subpanel, choose "Edit" from the Actions menu on the right of the revision's row and click "Save" to preserve the changes.
- **Note**: The new subpanel order will reset when the user's browser cache is cleared.
- **More Records** : By default, Sugar displays up to five revisions in each subpanel, though administrators can alter the number via Admin > System Settings as described in the System documentation of the Administration Guide. If additional related revisions exist, click "More {Module Name}..." (e.g. "More Emails...") at the bottom of the subpanel to load the next set of records.

For more information on revisions, please refer to the Revisions section of this documentation.

Article Categories

Categories provide a way to group knowledge base articles so that writers, as well as viewers, can easily locate desired articles and related topics. Each article can belong to one category, and a category can have many articles. Categories can also have child or parent categories, allowing for a hierarchical structure of categories and sub-categories. Categories can be viewed in the Categories list view and in the Knowledge Base Categories & Published Articles dashlet. Clicking on a category's

hyperlink in the Knowledge Base list view or an article's record view will open a drawer containing all articles belonging to that category, providing a convenient way to view and open articles. Alternatively, you can directly filter the Knowledge Base list view for a particular category. For more information about filtering list views, please refer to the [Search](#) documentation.

Categories List View

Click the triangle in the Knowledge Base module tab then select "View Categories" from the menu to open the Categories list view.

In the Categories list view, you can view all knowledge base categories and their subcategories by expanding the Categories tree view or search for categories by title in the search bar. Grey folder icons indicate that a category contains subcategories while white folder icons represent categories with no children. Clicking the grey folders, as opposed to the category name, will reveal its subcategories. You can perform actions on an individual category by clicking the triangle to the right of a category's row in the list view.

Each category's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Add Subcategory (Plus icon)	Create a new category as a child of this category
Edit	Edit the name of the category
Delete	Delete the category
Move Down	Move the category down in the tree
Move To	Move the category to a parent folder
Move Up	Move the category up in the tree

Creating Categories

Categories and subcategories can be created from the Categories list view, and top-level categories can be created from the Category field within an article's record view.

Creating via Categories List View

Use the following steps to create a category from the Categories list view:

1. Select "View Categories" from the Knowledge Base module tab's Actions menu.

2. Click "Create" and enter the category name in the new row which appears. Press the Enter key to save.

3. To create a subcategory, select the "+" to the far right of the category's row and enter the name of the new child row which appears. Press the Enter key to save.

Creating via Category Field

Use the following steps to create a top-level category from the Category field while creating or editing a knowledge base article. Please note that this method does not allow for creating subcategories:

1. Create a new article or edit an existing article in the Knowledge Base module.
2. Click the Categories field and select "Create a category" in the bottom left corner of the dropdown.

Alternatively, select the expand icon located in the bottom right corner to open the Search and Select Categories drawer and click "Create" in the top right corner of the drawer which opens.

3. Type the desired category's name into the open text box which appears and press the Enter key to save the new category.

4. Select the new category's name in the dropdown to select it for the current knowledge base article. If you do not wish to change the category of the current article, click outside of the Category field's dropdown.

Renaming Categories

Categories may be renamed via the Categories list view and the Categories field in an article's record view. To rename a category from the Categories list view, simply click the triangle to the far right of the category row and select "Edit". Type the new category name followed by the Enter key to save your change.

You can also rename categories while editing or creating an article. Click the category field to open the dropdown and select the Expand icon located in the bottom right corner. The drawer that opens allows categories to be renamed similarly to the list view. After renaming desired categories, you can click "Cancel" or select a category to relate to the current article.

Moving Categories

Users can change the order and hierarchy of categories via the Categories list view. Categories and subcategories can be moved up, down, or into a different folder. This can be accomplished through the drag and drop method or through the move options in the Record Actions menu.

Moving via Drag and Drop

To drag and drop a category to a new position in the Categories tree view, click and hold the category and drag it to the desired location. A category can be moved into a new position in the main tree view or into a different folder. A checkmark will appear beside the category name when the category is in a successful drop position.

Moving via Record Actions Menu

To move a category using the Record Actions menu, click the triangle located on the right of the category's row. The menu presents the following three options for moving categories:

- **Move Up** : Moves the category up one position within its current folder
- **Move Down** : Moves the category down one position within its current folder
- **Move To** : Moves the category to be the child of another category

Deleting Categories

Categories can be deleted via the Categories list view and the Category field in an article's record view. Use caution when deleting a category because it will not only delete the current category, it will also delete all of its subcategories. When a category is deleted, any articles belonging to the category will have empty Category fields. While the Category field is not required, it is useful for organizing articles. It is recommended to associated articles be assigned a new category using mass update prior to the deletion.

Note: When a parent category is deleted, all subcategories are automatically deleted as well.

To delete a category and its child subcategories from the [Categories list view](#), simply click the triangle to the far right of the category row and select "Delete".

You can also delete categories while editing or creating an article. Click the category field to open the dropdown and select the Expand icon located in the bottom right corner. The drawer that opens allows categories to be deleted similarly to the list view. After deleting unwanted categories, you can click "Cancel" or select a category to relate to the current article.

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Bugs

Overview

Sugar's Bugs module is used to track and manage product-related problems, commonly referred to as bugs, defects, or feature requests, either found internally or reported by customers. As a bug is reported, worked on, and resolved, its progress will be denoted by the Status field. Each bug record may relate to other Sugar records such as calls, contacts, and cases, making it easy to get the full picture of a customer's issues and history. If enabled, contacts can view and submit bugs via the Sugar Portal along with cases and knowledge base articles. This documentation will cover information and actions specific to the Bugs module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting bugs, please refer to the [Working With Bugs](#) section of this page.

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

Note: The Bugs module is not available for Sugar Sell users. For more information

on license types and the functionality available for each type, refer to the User Management documentation.

Bug Fields

The Bugs module contains a number of stock fields which come out-of-the-box with Sugar. For information on using and and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration Guide.

Field	Description
Assigned To	The Sugar user assigned to the bug
Category	The general area of the product or service where the bug was discovered
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the User Interface documentation for more details.
Date Created	The date the bug was created
Date Modified	The date the bug was last modified
Description	Explanation of the details and reproduction steps of the bug when submitted
Fixed in Release	The version of product where the bug was fixed
Follow Up Date	The internal follow-up date regarding the status of the bug
Found in Release	The version of product where the bug was found
Number	An automatically incremented number to identify every bug, which cannot be

	edited through Sugar
Pending Processing	A system-level checkbox field. It is not available in Studio or the user interface and is only available in SugarBPM.
Priority	Specify the urgency of the bug from this dropdown list
Resolution	Results of the investigation of the bug and how it can be fixed
Show in Portal	Bugs created in Sugar will be visible in the portal by default **Note**: Administrators can have this field disabled by default via Admin > Studio.
Source	The method in which this bug was submitted, (e.g. internal, customer email, portal, etc.)
Status	Specify the status of the bug as it moves along the process from submission to resolution
Subject	Brief statement of the problem
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the bug
Type	Type of categorization that this bug falls in to (e.g. Defect, Feature, etc.)
Work Log	Free form field to add activities and actions while working on the bug

Working With Bugs

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

Content Link	Description

	The Creating Records section covers the various methods of creating new bug records, including via the Create button in the Bugs module, via the Quick Create menu on the upper right of every Sugar page, via the Bugs subpanel on related module records, via duplication of an existing bug record, and via importing a list of bugs into Sugar using a .csv spreadsheet.
	The Viewing Records section describes the various methods of viewing bug records, including via the Bugs list view and record view, the Recently Viewed menu in the Bugs module tab, list view dashlets showing bug information, activity stream entries concerning bug updates or where a user mentions a bug, previewing bugs in the right-hand side panel, and reports displaying bug data.
	The Searching for Records section provides an introduction to the two searching methods for locating bugs: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Bugs module.
	The List View section walks through the many elements of the Bugs List View layout which contains a filterable list of all bug records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Bugs list view are described in the [List View Mass Actions Menu](#) and [List View Record Actions Menu](#) sections of this page.

[Bugs Record View](#) [Favorite Designation](#) [Following Designation](#) [Next or Previous Record](#) [Actions Menu](#) [Show More](#) [Subpanels](#) [Related Record Subpanels](#) [Filtering Subpanels](#) [Reordering Subpanels](#) [Activity Stream](#) [Dashboards](#)	The Record View section walks through the many elements of the Bugs Record View layout which contains detailed information about a single bug record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Bugs record view are described in the [Record View Actions Menu](#) section of this page.
[Editing Bugs](#) [Editing Inline via Record View](#) [Editing via Record View](#) [Editing Inline via Subpanels](#) [Editing Inline via List View](#) [Mass Editing via List View](#)	The Editing Records section describes the various methods of editing existing bug records, including inline via the Bugs record view, in full edit mode on the record view, inline via the Bugs subpanel on related module records, inline via the Bugs list view, and via the Mass Update option on the list view.
[Deleting Bugs](#) [Deleting via Record View](#) [Deleting via List View](#) [Mass Deleting via List View](#)	The Deleting Records section describes the various methods of deleting unwanted bugs, including via the Bugs record view, an individual record's Actions menu on the Bugs list view, and the Mass Actions menu on the list view.
[Exporting Bugs](#)	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of bugs and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).
[Recalculating Calculated Values](#)	The Recalculating Calculated Values section provides instructions on utilizing the Recalculate Values list view option to update calculated field values in the module if the administrator has changed the field's formula via Admin > Studio.
[Finding Duplicate Bugs](#)	The Finding Duplicate Records section provides instructions for locating duplicate bug records. If searching on matching fields (e.g. Subject) identifies one or more duplicates, they can be merged into a single record.

[Merging Bugs](#) [Merging via List View](#)	The Merging Records section provides instructions for merging duplicate bugs which will combine field values and related records into a single bug.
[Viewing Bug Historical Summaries](#)	The Viewing Record Historical Summaries section describes the Historical Summary record view option which displays quick details of the bug record's related calls, meetings, emails, notes, and tasks.
[Viewing Bug Audit Logs](#)	The Viewing Record Audit Logs section describes the View Audit Log record view option which displays a history of changes to the bug's audited fields.
[Bug PDFs](#) [Downloading Bug PDFs](#) [Emailing Bug PDFs](#)	The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of bug information as configured by an administrator via Admin > PDF Manager.
[Favoriting Bugs](#) [Favoriting via List View](#) [Favoriting via Record View](#) [Favoriting via Subpanel](#)	The Favoriting Records section describes the various methods of marking bugs as favorites, including via the Bugs list view, Bugs record view, or any Bugs subpanel appearing on the record view of a related module. Favoriting a bug allows you to easily access it from list views, dashlets, or the Bugs module tab.
[Following Bugs](#) [Following via List View](#) [Following via Record View](#)	The Following Records section describes the various methods of marking bugs as "Following", including via the Bugs list view and record view. Following a bug causes its activity stream updates to be included on your Home page and Bugs list view activity streams so that you can easily keep up with changes and user posts on the record.
[Sharing Bugs](#)	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the bug record. If the recipient is logged into Sugar, clicking the link will bring them directly to the bug's record

	view.

Bug Menus

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

Module Tab Menus

The Bugs module tab is typically found by clicking the arrow to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Bugs" to access the list view. Once the Bugs tab displays on the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important operations within the module. The [Recently Viewed menu](#) displays the list of bugs you most recently viewed. The [Favorites menu](#) displays the list of bugs you most recently marked as favorites.

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

Menu Item	Description
[Report Bug](#)	Opens the record view layout to create a new bug

View Bugs	Opens the list view layout to search and display bugs
View Bug Reports	Displays existing reports based on the Bugs module
Import Bugs	Opens the import wizard to create or update bugs using external data

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

- The Bugs module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Bugs module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Bugs module for your entire Sugar instance. Reach out to your Sugar administrator to have the Bugs module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration Guide.

List View Menus

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

List View Mass Actions Menu

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

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

Menu Item	Description
Mass Update	Mass update one or more bug at a time
Delete	Delete one or more bug at a time
Merge	Merge two or more duplicate bug
Export	Export one or more bugs to a CSV file
Recalculate Values	(Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio

List View Record Actions Menu

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

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

Menu Item	Description
Preview (Eye icon)	Preview this bug in the intelligence pane
Edit	Edit this bug
Follow	Follow this bug
Delete	Delete this bug

Record View Actions Menu

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

The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this bug.
Share	Share a link to this bug via email. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Download PDF	Download the record's information as a PDF file. - This menu option is only visible if the administrator has created a PDF template for the Bugs module via Admin > PDF Manager. - Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.
Email PDF	Email the record's information as a PDF attachment. This menu option is only visible if the administrator has created a PDF template for the Bugs module via Admin > PDF

	Manager. • Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates. **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Create Article	Converts information from the case to the record view of a Knowledge Base article. Please refer to the Knowledge Base documentation in the Application Guide.
Find Duplicates	Locate potential duplicates of this bug.
Copy	Duplicate this bug.
Historical Summary	View a historical summary of activities (e.g. calls, meetings, etc.) related to this bug.
View Audit Log	View a record of changes to this bug.
Delete	Delete this bug.

Sugar Portal and Bugs

The Sugar Portal allows customers to view bugs as well as submit bugs directly to Sugar. Please note that customers have to be registered users of the portal in order to access it. For more information on enabling and configuring the portal, please refer to the Sugar Portal documentation. For information on using the portal, please refer to the Portal Deployment User Guide and Portal User Guide documentation.

In addition to being used by your customers to view and report bugs, the Sugar Portal can also be used as a method of communicating about bugs between customers and your organization. Utilizing the portal this way ensures that all bug-related communications between your users and contacts are stored in Sugar. This communication is conducted via related note records which can be created by both Sugar users and portal-enabled contacts. Sugar users can create and add notes to the bug via the Notes subpanel on the bug's record view in Sugar. Please note that bugs created in Sugar will automatically appear in the portal as the Show in Portal checkbox is enabled by default in the bug's record view. But administrators can

have this field disabled by default via Admin > Studio. Customers can easily add notes to the bug as well by clicking the Add a Note button on the bug's record view in the portal. When a customer adds a note via the portal, the note record will appear in the Notes subpanel of the bug's record view in Sugar. Likewise, when a Sugar user adds a note to a bug in Sugar, the note record will appear in the Notes panel of the bug's record view in the portal. Please keep in mind that notes attached to bugs will automatically appear in the portal as the Display in Portal checkbox is enabled by default in the note's record view. But administrators can have this field disabled by default via Admin > Studio. These notes will be visible to anyone with access to the portal.

Emails and Bugs

Bugs may be related to emails by being selected in the email's Related To field. These relationships allow the bug to display all relevant email correspondence in the Emails subpanel and in the History dashlet on a bug's record view.

Emails Subpanel

The Emails subpanel in the Bugs module displays emails which are related to the bug record via the email's Related To field. These emails will also appear in the

[History dashlet](#) on a bug's record view.

The Emails subpanel allows the following functions to be performed:

- **Email Details** : To view the details of an email, click the subject to open it in detail view.
- **Record Count** : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- **Collapse or Expand** : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
  - **Note**: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the [System](#) documentation in the Administration Guide.
- **Column Widths** : Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- **Column Sort** : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).
- **Compose a New Email** : Click the Plus button on the upper right of a subpanel to create a new email with, by default, a relationship to the bug you are currently viewing. The email will automatically select the bug in the Related To field.
  - To send email from Sugar, users must configure their outbound email server via [Emails > Email Settings](#) or, if using the system email account to send email, the system's outbound email server must be configured by an administrator in [Admin > System Email Settings](#).
  - Because creating a new related record opens a drawer on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- **More Records** : By default, Sugar displays up to five records in each subpanel, though administrators can alter the number via Admin > System Settings as described in the [System](#) documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g. "More emails...") at the bottom of the subpanel to load the next set of records.

Creating a Knowledge Base Article

You can create knowledge base articles based on a bug or case. This is particularly useful when the bug fix or situation will not be resolved until a later date, but a workaround currently exists. Simply click "Create Article" in the Bug record view's Actions menu. The Knowledge Base record view layout opens and includes all of the relevant fields for your organization's articles. For more information on creating knowledge base articles, please refer to the [Knowledge Base](#) documentation.

In order for an article to be visible in the Sugar Portal, the article must meet both of the following requirements:

- External Article = Checked
- Status = Published

Note: If either of these conditions is not met, the article will not be visible through the Sugar Portal.

Reports

Overview

Sugar's Reports module allows users to build, generate, and manage reports for modules such as Accounts, Contacts, Calls, etc. Reporting is a valuable tool in Sugar as users can gather data from various modules to generate vital information for their organization. There are four types of reports (Rows and Columns Report, Summation Report with Details, Summation Report, Matrix Report) available in Sugar. Some reports can be rendered as charts which allow you to drill through to see the corresponding records. This page covers functionality specific to the Reports module. For instructions concerning views and actions which are common across most Sugar modules, such as viewing, editing, etc., please refer to the [Working With Reports](#) section of this page.

Report Fields

The Reports module contains a number of stock fields which come out-of-the-box with Sugar. For information on using and and editing various field types, refer to the [User Interface](#) documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. The following fields are available when viewing the Reports list view.

Field	Description
Accessed On	The date the report record was last opened
Chart Type	The chart type (if applicable) defined for the report
Date Created	The date the report record was created
Date Modified	The date the report record was last modified
Description	A description or other key information about the report

	Note: The Description field is only viewable and editable via the list view preview.
Module	The target module (e.g. Accounts) associated with the report
Name	The name of the report
Report Type	The report type (Rows and Columns Report, Summation Report, Summation Report with Details, Matrix Report) specific to the report
Tags	User-created keywords that can be used to identify, organize, and group report records by common attributes **Note**: The reports module contains over 100 stock reports that are pre-tagged using a combination of the following out-of-the-box tags: • Stock Report • Sales and Marketing • Customer Service • Data Privacy • Administrative For more information on tags in Sugar, please refer to the Tags documentation. For more information on stock reports, please refer to the Stock Reports documentation.
Team	The Sugar team(s) assigned to the report record
User	The Sugar user assigned to the report record

Working With Reports

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

Content Link	Description
[Viewing Reports](#) [Viewing via List View](#) [Viewing via Recently Viewed](#) [Viewing via Dashlets](#) [Viewing via Preview](#)	The Viewing Records section describes the various methods of viewing report records, including via the Reports list view, the Recently Viewed menu in the Reports module tab, list view dashlets showing report information, and previewing reports in the right-hand side panel.

[Searching for Reports](#)
[List View Search](#)
[Creating a Filter](#)
[Saving a Filter](#)
	The Searching for Records section provides an introduction to list view search, which searches and filters within the Reports module.
	
	Note: The Report module's Filter option also includes the following filters out-of-the-box:
	
	  • **Stock Reports** : Filter the list view to show only the reports that were included with Sugar.
	  • **Non-Stock Reports** : Filter the list view to show only user-created reports.
	  • **With Charts** : Filter the list view to show only reports that are designed with charts.
	
	For more information on stock reports, please refer to the [Stock Reports](#) documentation.

[Reports List View](#) [Total Record Count](#) [Create Button](#) [List View Search](#) [Checkbox Selection](#) [Mass Actions Menu](#) [Favorite Designation](#) [Column Reordering](#) [Column Resizing](#) [Column Sorting](#) [Column Selection](#) [Preview](#) [Record Actions Menu](#)	The List View section walks through the many elements of the Reports List View layout which contains a filterable list of all report records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Reports list view are described in the [List View Mass Actions Menu](#) and [List View Record Actions Menu](#) sections of this page.

[More Reports](#) [Intelligence Pane](#)	
[Editing Reports](#) [Editing Inline via List View](#) [Editing via List View Preview](#) [Mass Editing via List View](#)	The Editing Records section describes the various methods of editing existing report records, including inline via the Reports list view, via the List View preview, and via the Mass Update option on the list view.
[Deleting Reports](#) [Deleting via List View](#) [Mass Deleting via List View](#)	The Deleting Records section describes the various methods of deleting unwanted reports, including via an individual record's Actions menu on the Reports list view and the Mass Actions menu on the list view.
[Favoriting Reports](#) [Favoriting via List View](#)	The Favoriting Records section describes marking reports as favorites via the Reports list view. Favoriting a report allows you to easily access it from list views, dashlets, or the Reports module tab.

Report Menus

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

Module Tab Menus

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

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

Menu Item	Description
Create Report	Opens the Report Wizard for creating a new report
View Reports	Opens the list view layout for searching and displaying reports
Manage Advanced Reports	Opens the Advanced Reports tab for creating and viewing advanced reports
Report Schedules	Opens the Report Schedules module for scheduling automated reports via email

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

- The Reports module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Reports module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Reports module for your entire Sugar instance. Reach out to your Sugar administrator to have the Reports module displayed. For more information on displaying and hiding modules

throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration Guide.

List View Menus

The Reports [list view](#) displays all report records and allows for searching and filtering to locate specific reports. You can view the basic details of each record within the field columns of the list view or click a report's name to open the detail view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

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

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

Menu Item	Description
[Mass Update](#)	Mass update one or more reports at a time
[Delete](#)	Delete one or more reports at a time

List View Record Actions Menu

The Record Actions menu to the far right of each record's row allows you to

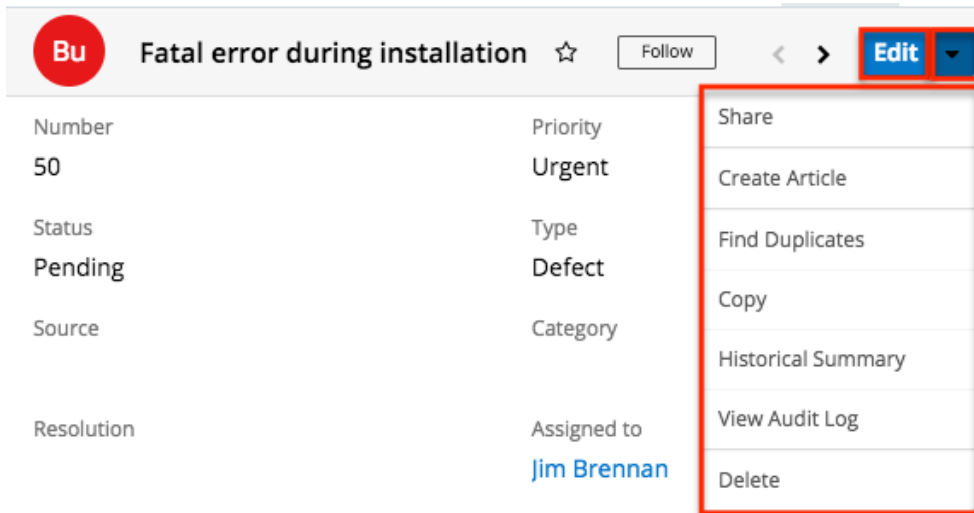perform actions on the individual report directly from the list view.

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

Menu Item	Description
Preview (Eye icon)	Preview this report in the intelligence pane
Edit	Inline edit this report
Edit Report	Edit the report via the Report Wizard
Create Schedule	Send a copy of this report to your email inbox on a recurring basis
View Schedules	View any scheduled reports for this report in the Report Schedules list view
Delete	Delete this report

Detail View Actions Menu

The Reports detail view displays a single report in full detail including display column fields (if applicable), charts (if applicable), etc. To access a report's detail view, simply click a hyperlinked report name from anywhere within Sugar. The Actions menu appears on the top left of each report's detail view and allows you to perform various operations on the current report. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Run Report	Run this report to generate the result
Share	Share a link to this report via email **Note**: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Edit	Edit this report
Copy	Duplicate this report to create a new report
Create Schedule	Send a copy of this report to your email inbox on a recurring basis.
View Schedules	View any scheduled reports for this report in the Report Schedules list view
Print as PDF	Download this report as a PDF file
Export	Export this report's result to a CSV file
Delete	Delete this report

Report Types

There are four types of reports (Rows and Columns Report, Summation Report, Summation Report with Details, Matrix Report) available for users to create in Sugar. Please note that each report type provides users with information for records that meet the specified criteria, but each type displays the report results in different layouts.

Rows and Columns

The Rows and Columns report is the most basic report to create out of the four report types. The report results display the data in a simple rows and columns format displaying values for the selected display column fields for all records meeting the specified criteria. For more information on creating a Rows and Columns report, please refer to the [Rows and Columns Report](#) section.

Summation

The Summation Report provides computed data based on the selected fields for records meeting the specified criteria. You can group the report based on one or more fields from the target or related module. The report result displays the data in groups, summarized using computed derivatives (e.g. SUM, AVG, MAX, MIN) from numeric-type field values (e.g. Likely) as well as weighted amounts. Summation Reports can be viewed in a chart format and displayed as a Sugar Dashlet on your Home page as well. For more information on creating a Summation Report, please refer to the [Summation Report](#) section.

Summation Report with Details

The Summation Report with Details is a combination of the Summation-type and Rows and Columns-type report as you can group the data, get the total count of records, and choose display columns (e.g. Contact Name, Account Name, Email Address) as well. You can group the report based on one or more fields from the target or related module. Summation Report with Details can be viewed in a chart format and displayed as a Sugar Dashlet on your Home page. For more information on creating a Summation Report with Details, please refer to the [Summation Report with Details](#) section.

Matrix

The Matrix Report is also similar to the Summation-type report as it provides an overview of the computed data and displays the total summary count. The report results display in a grid table with row and column headers. The numeric field

values for all display summaries appear on the table along with the total amounts for each row and column. Matrix Reports can be viewed in a chart format and displayed as a Sugar Dashlet on your Home page. For more information on creating a Matrix Report, please refer to the [Matrix Report](#) section.

Creating Reports

There are various types of reports (e.g. Rows and Columns Report, Summation Report with Details, Summation Report, Matrix Report) you can create via the Reports module. The first step of creating a report via the Report Wizard is to choose the report type, and the steps to create the report vary slightly depending on the report type chosen. Please note that you can create reports in Sugar via the Reports module itself using the Create options as well as by duplicating an existing report via the Copy option.

Creating via Reports Module

The most common method of report creation is via the Reports module using the Create button in the list view or the Create Report option in the module tab. This opens the Report Wizard which allows you to build the necessary report and generate the results accordingly. The following sections cover creating the four different report types via the Reports module.

Creating a Rows and Columns Report

Of the four report types, the Rows and Columns report is the most basic one to create in Sugar. Users can simply define filters to determine which records the report will include or exclude then choose the fields (e.g. Name, Email Address) they would like displayed in the report result. The Rows and Columns report creates a tabular report containing the values of selected display column fields for all records meeting the specified criteria.

The following steps cover creating a Rows and Columns report for calls with a status of "Held" as an example:

1. Click the triangle in the Reports module tab and select "Create Report".
2. Choose "Rows and Columns Report" as the report type and "Calls" as the target module in the following step.

Click an icon to select a Report Type.

Rows and Columns Report

Create a tabular report that contains the values of selected display fields for records matching the specified criteria.

Summation Report with Details

Create a summation report that displays additional data related to the records in the results.

Summation Report

Create a tabular report that provides computed data for records matching the specified criteria. The data can also be represented within a chart.

Matrix Report

Create a summation report that displays results in a grid format and grouped by a maximum of three fields.

3. To filter on a field related to the target module, select it from the Available Fields list on the bottom left to add it to the list of filters. In this example, select "Status" to filter the report based on call records already held. Click "Next".
    - For more information on report filters, please refer to the [Report Filters](#) section.

4. On the Choose Display Columns step, select the fields you would like included in the report results from the Available Fields list then click "Next". We are adding the following fields as an example: Subject, Status, Description, Date Created, User Name, Contacts Name, and Account Name.
    - For more information on selecting display column fields, please refer to the [Report Display Columns](#) section.
5. Select "Subject", "Date Created", "Status", and "Description" in the "Available Fields : Calls" list, as these are fields contained in the Calls module. By default, the target module's fields display in the Available Fields list.
    - **Note**: You can designate the generated report to be sorted by a specific display column field in either ascending or descending

order. Simply mark the radio button next to the field label then select "Ascending" or "Descending" in the corresponding dropdown list.

6. For the User Name field, click "Assigned to User" from the Related Modules list at the top left then select "User Name" from the "Available Fields : Assigned to User" list.
    ◦ **Note**: User names are stored in their own table in the database and are related to the modules in Sugar. So even though the Assigned User field appears in various module layouts, they are not direct fields in those modules.

7. For the Contact Name field, click "Contacts" from the Related Modules list then select "Name" from the "Available Fields : Contacts" list.
    ◦ By default, the label for the Name field displays "Name", but you can change the label to "Contact Name" to differentiate the field

between accounts and contacts. For more information on changing display column labels, please refer to the [Changing Display Column Labels](#) section.

8. For the Account Name field, click "Account" from the Related Modules list then select "Name" from the "Available Fields : Account" list.
   - Change the label for the Name field to display "Account Name". For more information on changing display column labels, please refer to the [Changing Display Column Labels](#) section.
9. To place the fields in a different order on the report, drag and drop the field rows within the display column list.
   - The first field (Subject) on the display columns list represents the first column of the report, the second field (Date Created) is the second column, and so forth. For more information on changing the display column order, please refer to the [Changing Display Column Order](#) section.
10. Click "Next" after adding all of the appropriate fields.
11. On the Report Details step, enter the report name and assign it to the desired user and team.
    - Please note that if you want your report to include all held calls whether or not they have an assigned user, related contact, or account, you must mark the Optional Related Modules boxes. For more information on marking related modules as optional, please refer to the [Optional Related Modules](#) section.

12. After entering the report details, click "Save and Run" to save and generate the report immediately.
    - Clicking the Preview button allows you to preview the report before saving.
    - Clicking the Save button saves the report without running it immediately.

Name: Calls with Held Status					Type: Rows and Columns Report	
Modules: Calls, Calls > Assigned to User, Calls > Contacts, Calls > Account					Teams: Global	
Display Columns: Subject, Date Created, Status, Description, User Name, Contacts Name, Account Name					Assigned to: Max Jensen	
Schedule: None						
Filters: ⌃						

(1 - 4 of 4)

Subject ⇕	Date Created ⇕	Status ⇕	Description	User Name ⇕	Contacts Name ⇕	Account Name ⇕
Follow up call ✎	02/28/2013 03:20pm	Held	Call with Sheena regarding new account.	max	Sheena Rathbone ✎	
Contract Renewal ✎	03/04/2013 11:21am	Held	Call with Waverly Trading House regarding contract renewal.	max		Waverly Trading House ✎

Creating a Summation Report

The Summation Report groups and provides computed data for records that meet the specified criteria. You can choose a number of group-by columns to group the data in the report and can define group-by data for related modules as well. You can also drag and drop the group-by fields to a different order in the Define Group By step to change the layout in the report results. Please note that the Summation Report does not provide detailed information like Summation Report with Details and will not include any display columns in the report.

The following steps cover creating a report to capture closed won opportunities for Q2 2017 grouped by assigned user and the month it was closed as an example:

1. Click the triangle in the Reports module tab and select "Create Report".
2. Choose "Summation Report" as the report type and "Opportunities" as the target module.

3. Next, define the report filters as follows then click "Next":
   - Select "Expected Close Date" from the Available Fields panel, then choose "Is Between" and select "04/01/2017 and 06/30/2017" from the options appearing to the right of the Expected Close Date filter.
   - Select "Sales Stage" from the Available Fields panel, then choose "Is" and "Closed Won" in the dropdowns appearing to the right of the Sales Stage filter.

4. On the Define Group By step, select "User Name" and "Month: Expected Close Date", which will group the closed won opportunity records by the assigned user and month it was closed. Click "Next".

5. On the Choose Display Summaries step, select "SUM: Likely" to summarize the report based on the opportunity's likely total amounts. Click "Next". Please note that the field(s) selected in the Define Group By step are automatically included in the Choose Display Summaries step.
   - **Note**: You can sort results by a specific field column in either ascending or descending order. Simply select the radio button next to the field label (e.g. Month: Expected Close Date) then select "Ascending" or "Descending" in the corresponding dropdown list.

6. On the Chart Options step, select the type of chart, if any, that you wish to display in the report as well as how the data should be summarized on the chart, then click "Next". For more information on setting up the chart options, please refer to the Report Chart Options section.
7. On the Report Details step, enter a name for the report and assign it to the appropriate user and team.
   - **Note**: Enable the "Optional Related Modules" box to include all closed won opportunities whether or not they are assigned to a user. For more information regarding this option, please refer to the Optional Related Modules section.

8. After entering the report details, click "Save and Run" to save and generate the report immediately.
   - Click the Preview button to preview the report before saving.

- Click the Save button to save the report without running it immediately.
- To view the values corresponding to a section of the chart, hover your mouse over the section.
- To view the list records corresponding to a section of the chart, simply click the bar in the chart. For more information, refer to the Drilling Through Charts section.

User Name ⇕	Month: Expected Close Date ⇕	SUM: Likely ⇕
sally	June 2017	$50,337.00
chris	June 2017	$30,790.00

Creating a Summation Report with Details

The Summation Report with Details groups and summarizes data with detailed information related to records in the report. You can group the report based on one or more fields from the target or related module. Grouping the report by particular fields allows the report results to display data in categories by the specified field values. You can also drag and drop the group-by fields to a different order in the Define Group By step to change the layout in the report results.

The following steps cover creating a Summation Report with Details to capture closed won opportunities in 2016 grouped by month as an example:

1. Follow Steps 1-5 of the Summation Report section and complete the report

criteria as follows:

- **Report Type** : Select "Summation Report with Details"
- **Target Module** : Choose "Opportunities"
- **Define Filters** : Define the [report filters](#) as follows then click "Next":
  - Select "Expected Close Date" from the Available Fields panel, then choose "Is Between" and select "01/01/2016" and "12/31/2016" from the options appearing to the right of the Expected Close Date filter.
  - Select "Sales Stage" from the Available Fields panel, then choose "Is" and "Closed Won" in the dropdowns appearing to the right of the Sales Stage filter.
- **Define Group By** : Select "Month: Expected Close Date" from the Available Fields panel then click "Next".
- **Choose Display Summaries** : Select "SUM: Likely" from the Available Fields panel then click "Next".
  - **Note**: The field(s) selected in the Define Group By step are automatically included in the Choose Display Summaries step.
2. On the Choose Display Columns step, select the fields (e.g. "Opportunity Name", "Expected Close Date", "Likely", "Sales Stage", and "User Name") you would like included on the report from the Available Fields panel then click "Next".
   - Refer to Steps 5-10 of the [Rows and Columns Report](#) section for instructions on adding fields as display columns.
   - For more information on selecting display column fields, please refer to the [Report Display Columns](#) section.

3. On the Chart Options step, select the type of chart, if any, that you wish to display in the report as well as how the data should be summarized on the chart and then click "Next".
4. On the Report Details step, enter a name for the report and assign it to the appropriate user and team.
    ◦ **Note**: Select the "Optional Related Modules" box to include all closed won opportunities whether or not they are assigned to a user. For more information regarding this option, please refer to the Optional Related Modules section.
5. After entering the report details, click "Save and Run" to save and generate the report immediately.
    ◦ Click the Preview button to preview the report before saving.
    ◦ Click the Save button to save the report without running it immediately.
    ◦ To view the corresponding chart values, simply hover your mouse over the bar in the report chart.

Total is 978K

Collapse All

⋀ Month: Expected Close Date = January 2016, SUM: Likely = $208,272.56				
Opportunity Name ⇕	Expected Close Date ⇕	Opportunity Amount ⇕	Sales Stage ⇕	User Name ⇕
Spindle Broadcast Corp.	01/30/2016	$50,950.00	Closed Won	will
Chandler Logistics Inc	01/27/2016	$51,683.00	Closed Won	chris

Creating a Matrix Report

The Matrix Report provides an overview of the data and displays the total for display summaries in a grid format. The numeric field values for all display summaries appear on the table along with the total amounts for each row and column. You can choose a maximum of three group-by columns to group the data in the report.

You can also choose specific layout options (e.g. 1x2 and 2x1) on the Report Details step of the Report Wizard if you selected three group-by columns on the Define Group By step. The 1x2 layout option displays the data for the first group-by field in a row and displays the data for the other two group-by fields in columns. The 2x1 layout option displays the data for the first two group-by fields in rows and displays the data for the third group-by field in a column. If you only have two group-by columns, you can manually change the report layout by dragging and dropping the group-by fields to a different order on the Define Group By step. Please note that the Matrix Report does not provide detailed information like Summation Report with Details and will not include display columns in the report.

The following steps cover creating a Matrix Report to capture closed won opportunities in 2016 grouped by assigned user and the month it was closed as an example:

1. Follow Steps 1-5 of the [Summation Report](#) section and complete the report criteria as follows:

   - **Report Type** : Select "Matrix Report"
   - **Target Module** : Choose "Opportunities"
   - **Define Filters** : Define the [report filters](#) as follows then click "Next":
     - Select "Expected Close Date" from the Available Fields panel, then choose "Is Between" and select "01/01/2016" and "12/31/2016" from the options appearing to the right of the Expected Close Date filter.
     - Select "Sales Stage" from the Available Fields panel, then choose "Is" and "Closed Won" in the dropdowns appearing to the right of the Sales Stage filter.
   - **Define Group By** : Select "Month: Expected Close Date" and "User Name" from the Available Fields panel then click "Next"
     Note: You must click the related Assigned to User module to select the User Name field as user names are not direct fields of the Opportunities module.
   - **Choose Display Summaries** : Select "SUM: Likely" from the Available Fields panel then click "Next"
     Note: The field(s) selected in the Define Group By step are automatically included in the Choose Display Summaries step.
2. On the Chart Options step, select the chart type that you wish to display in the report as well as how the data should be summarized on the chart, then click "Next". For more information on setting up the chart options, please refer to the [Report Chart Options](#) section.
3. On the Report Details step, enter a name for the report and assign it to the appropriate user and team.
4. Mark the "Optional Related Modules" box to include all closed won opportunities whether or not they are assigned to a user. For more information regarding this option, please refer to the [Optional Related Modules](#) section.
   - **Note**: The [Layout Options dropdown list](#) (1x2 and 2x1) will appear if you selected three group-by columns on the Define Group By step. Select the appropriate layout depending on how you want the data to be displayed on the report grid.
5. After entering the report details, click "Save and Run" to save and generate the report immediately.
   - Click the Preview button to preview the report before saving.
   - Click the Save button to save the report without running it immediately.

When viewing the report's chart, hover your mouse over the bar in the report chart to se the corresponding chart values.

Total is 978K

Month: Expected Close Date	User Name					Grand Total
	chris	max	sally	sarah	will	
January 2016	$51,683.00	$27,472.00	$36,522.00	$41,645.56	$50,950.00	$208,272.56
February 2016		$82,423.33	$80,942.22	$38,284.00		$201,649.55

SUM: Likely

Creating Reports via Duplication

You can also create a new report by duplicating an existing report in Sugar. The Copy option is useful if the report you are creating has similar information to an existing report. You can also copy a report if you would like to view the same or similar data as a different report type. This option is presented when the user clicks "Copy" from the report's Actions menu.

Note: If any report schedule records have been created and related to the original report, they will not copy over to the new report. For more information on creating report schedule records, please refer to the Scheduling Reports section.

The following steps cover creating a report by duplicating an existing Rows and Columns-type report as an example:

1. Navigate to a report's detail view.
2. Click the Actions menu and select "Copy".
3. Choose the report type you would like to create from the Copy-As submenu. To keep the new report's type the same, choose "As Original Type".

4. Go through the Report Wizard to select and enter new data as described in the sections under Report Options. If you selected a report type other than the original type, there may be additional or fewer steps in the Report Wizard to complete and you may need to edit the report to meet the new report type's requirements.
5. In the final step, enter a new name for the report and click "Save and Run".

Report Options

There are various steps involved when creating reports in Sugar and the steps can vary slightly depending on the report type (e.g. Summation report versus Rows and Columns). The following sections provide details concerning the steps involved when creating reports.

Report Filters

The Define Filters step of the Report Wizard determines which records the report includes or filters out. Filter groups and operators allow for additional levels of complexity as you combine filters to get the precise result set you desire.

Target Module Filters

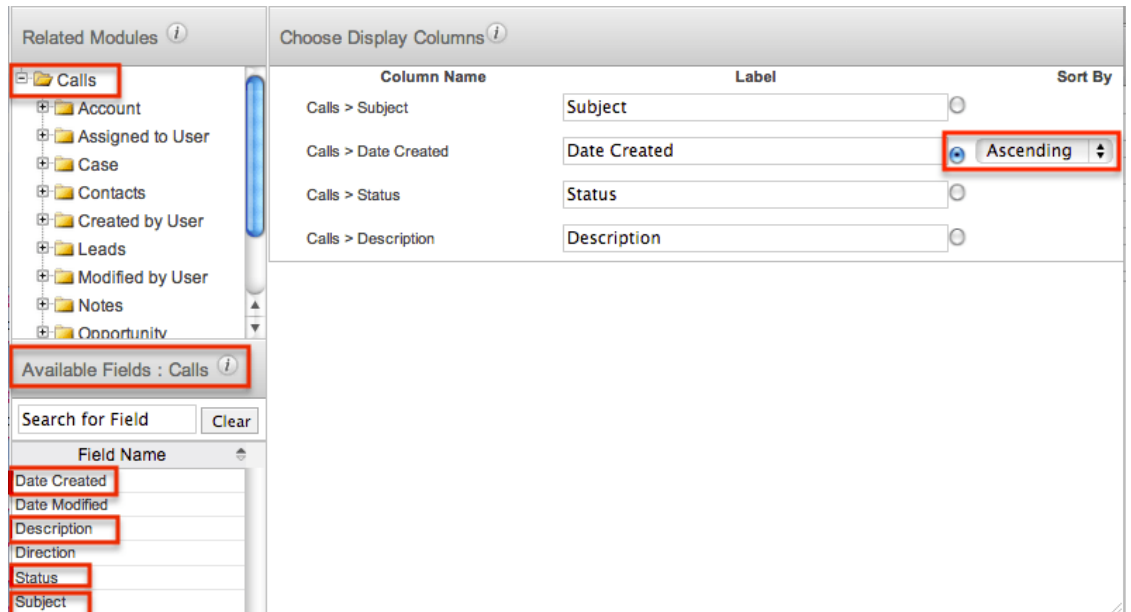By default, the fields for the Target Module you are creating the report on will be displayed in the Available Fields list. To filter on the field related to the target module, select it from the Available Fields list on the bottom left, and it will be added to the list of filters. Please note that only fields marked as "Reportable" in Studio will display in the Available Fields list. For more information on marking fields as reportable, please refer to the Studio documentation in the Administration guide.

You can also use the search feature above the Available Fields list to easily locate a field. Enter the appropriate keyword (e.g. billing, date) in the search field and the matching results will display in the Available Fields list. Sugar automatically appends the wildcard character (%) to the beginning and end of your search phrase, so the system will return all fields that contain the keyword.

Related Module Filters

The Related Modules list shows all modules that have a relationship with the target module. To filter on a field in a related module, choose the name of the module (e.g. Documents) in the Related Modules list, and the Available Fields list below will display fields belonging to the related module. You can select the desired field(s) from the related module to add as a filter for your report. Please note that only fields marked as "Reportable" in Studio will display in the Available Fields list. For more information on marking fields as reportable, please refer to the Studio documentation in the Administration guide.

You can also use the search feature above the Available Fields list to easily locate a field. Enter the appropriate keyword (e.g. billing, date) in the search field and the matching results will display in the Available Fields list. Sugar automatically appends the wildcard character (%) to the beginning and end of your search phrase, so the system will return all fields that contain the keyword.

Filter Values

Once the filter has been created, you can specify what field values constitute a match for the report in the Define Filters section. Select the appropriate value from the corresponding dropdown list and enter the relevant value in the open text box (if applicable).

Please note that if the assigned user or a member of your team changes or adds a new filter, the system alerts you that the report filters have been modified since the last run when you save and run the report.

Run-Time Filters

The run-time option in the Define Filters step allows you to make the filter(s) available on the saved report, which enables you to quickly change your filter values without having to edit the report. Simply mark the Run-time box for any filter(s) you wish to view on the saved report.

Once the report is created and saved, the run-time filter (e.g. "Accounts > Date Created") will appear on the generated report view. You can change the filter values directly from the report view by selecting the new filter values from the dropdown list and clicking "Apply" or "Run Report" at the top of the report's detail view. Clicking the Reset button will reset the run-time filter back to the original filter value you set.

Please note that the Report Wizard retains the original filter value(s) you set when building the report regardless of the changes you or other users make on the run-time filters on the report's detail view. If the report is shared by a team, then each user can run the report with different run-time filter values to meet their individual needs. The run-time filter values set by each user will be preserved for future

viewing until they change or reset the value.

Operators

When building the report, you have the option to choose between two operators, "AND" and "OR", using dropdowns within the Define Filters section. By default, operators are set to "AND" which will cause the filters to work cumulatively. All filters or groups of filters under an AND operator will need to be true for a record in order for that record to appear in the report result. Changing an operator to "OR" will mean that if any single filter under that "OR" is true for a record, the record will be included in the report results. The OR operator accepts records matching any of the filters while the AND operator accepts records matching all filters.

Filter Groups

By default, all filters will be added to a single group. To split filters into multiple groups, use the Add Filter Group button.

When you have more than one filter group and click a new filter field, Sugar will prompt for which filter group the new field should belong.

Filter groups and operators can be combined to achieve complex filtering situations. For example, if we need a report for documents belonging to accounts

created prior to the first quarter where the document is either new this week or new this month is connected to a lead, we would use the following filter groups with an OR operator joining the two together:

Filters on Tag Fields

If a report's target module contains the Tags field, the report can be filtered by tags via the Related Modules filters. To filter by tags, click on the Tags module name in the Related Modules list. The Available Fields list below will display fields belonging to the Tags module. Select the Name field to create a tag filter. Please note that you can select any field(s) from the Tags module as a filter for your report, but this example will only demonstrate filtering by the tag's name.

After clicking on the Name field, a line item will appear in the Filters view that allows you to select an operator and specify a tag name in its adjacent text field. This text field is not a type-ahead style like the Tags field is in the Sidecar modules and can only contain a single tag phrase (e.g. tradeshow, hot lead). While the field

is case-insensitive, you must know the precise spelling of the tag name that you wish to use as a filter.

To filter a report by more than one tag, click on the Name field again for each additional tag. This will produce additional filter rows where you can specify the appropriate operator and its corresponding tag. In the following example, the report will display a list of account records that are tagged with any one or more of the three specified tags (manufacturing, laser, or hot prospect).

When the Tags field is used as a related-module display column in a Rows and Columns report or Summation Report with Details, the Tags column will display a separate line item for each tag that a record contains. For example, an account tagged as both "manufacturing" and "laser" will be displayed twice in an Accounts report if the report displays the Tags column. Also, note that the Tag column will only display a single tag even if the record contains multiple tags. This will be the tag that matches the filter criteria.

Please note that clicking on a hyperlinked tag name from report results will take you to the tag's record view. For more information on tags in Sugar, please refer to the Tags documentation.

Filters on Date and Datetime Fields

When creating reports in Sugar, specifying a range of time is a useful way to isolate your desired results. Sugar provides a set of pre-defined options to help you easily target the most common date ranges:

Date Range Filter	Definition
On	A specific day
Before	Any value before the specified date

After	Any value after the specified date
Is Between	Any values after a specified start date but before a specified end date
Not On	Any values except the specified date
Is Empty	No date set for the field
Is Not Empty	Any date set for the field
Yesterday	A value set to the prior day
Today	A value set to the current day
Tomorrow	A value set to the following day
Last # Days	Any values within the last X days including the current day
Next # Days	Any values within the next X days including the current day
Last 7 Days	Any values within the last 7 days including the current day (e.g. Running on Monday includes the previous Tuesday morning through the end of the current Monday)
Next 7 Days	Any values within the next 7 days including current day (e.g. Running on Monday includes the current Monday morning through the end the following Sunday)
Last Month	Any values that fall within the prior calendar month
This Month	Any values that fall within the current calendar month
Next Month	Any values that fall within the next calendar month
Last 30 Days	Any values within the last 30 calendar days including the current day
Next 30 Days	Any values within the next 30 calendar days including the current day
Last Quarter	Any values within the prior quarter defined by the calendar year (e.g. January - March, April - June)
This Quarter	Any values within the current quarter defined by the calendar year (e.g. January - March, April - June)

Next Quarter	Any values within the upcoming quarter defined by the calendar year (e.g. January - March, April - June)
Last Year	Any values within the prior calendar year
This Year	Any values within the current calendar year
Next Year	Any values within the upcoming calendar year

Additionally, if your administrator has configured the Forecasts module via Admin > Forecasts, additional options based on your organization's fiscal year will be available. If your fiscal year follows a traditional calendar year, these options will function in the same way as the corresponding options above:

Date Range Filter	Definition
Previous Fiscal Year	Any values within the prior fiscal year
Previous Fiscal Quarter	Any values within the prior quarter defined by the fiscal year
Current Fiscal Year	Any values within the current fiscal year
Current Fiscal Quarter	Any values within the current quarter defined by the fiscal year
Next Fiscal Year	Any values within the upcoming fiscal year
Next Fiscal Quarter	Any values within the upcoming quarter defined by the fiscal year

For more information about configuring the Forecasts module, please refer to the [Forecast Configuration](#) documentation in the Administration guide.

Note: When generating reports with datetime filters, Sugar will always adjust the results to ensure they are accurate according to the time zone settings of the user accessing the report. For instance, a user on Eastern Standard Time (-5 GMT) may see a different set of results for a report than would a user on Pacific Standard Time (-8 GMT) because the date ranges are adjusted for the user's time zone.

Group By Fields

Summation Reports and Summation Reports with Details allow you to group records by one or multiple fields within a module. Select a module in the Related Modules pane to display the fields by which you can group. Note that some module

fields may not be displayed since only field types that contain set values can be used for grouping (e.g. text fields cannot be used).

Click field names individually to add them to the Define Group By list, or use the Search field to locate specific fields. There is no limit to the number of fields you can include; however, including too many fields may make the report difficult to read. When there are multiple Group By fields, drag and drop field names to reorder this list. The first field in the list determines the Y-axis of a chart and the remaining fields appear as different colors in the chart legend.

Report Display Columns

The display columns step allows users to select which field(s) they would like included when generating the report. The system will pull data specific to these fields based on the report criteria for the associated module record. When you select a field from the Available Fields list, they will be added to the right of the list with the displayed path of the field (e.g. Contacts > Assigned to User > User Name). The displayed field paths show users where the field is originating from to retrieve the value for the report. For example, although "Email Address" appears as a field in several modules (e.g. Accounts, Contacts, Leads), email addresses are actually stored in their own table and are related to the modules where they appear as opposed to being direct fields of those modules. So, the corresponding displayed path will show the primary module record, then the related module followed by the field name (e.g. Contacts > Email Address > Email Address) since the email address field is a field of the related Email Address module.

To remove any unnecessary fields from the display column list, simply click the "-" sign to the far right of the displayed field path row.

Changing Display Column Labels

By default, the selected display column fields will display stock labels which can be changed if you desire. To change the label, simply enter the new label name in the open text field then click outside of the text box to preserve the change.

https://sugarinternal.sugarondemand.com/#Dashboards?moduleName=Home

Changing Display Column Order

You can change the left-to-right order of the display columns by dragging and dropping the displayed field paths in the Choose Display Columns section.

Defining Column Sort

You can also designate the generated report to be sorted by a specific field column in either ascending or descending order. Simply mark the radio button next to the field label then select "Ascending" or "Descending" in the corresponding dropdown list. Please note that only one display column can be designated to sort by default in the report.

Optional Related Modules

The Optional Related Modules option will appear on the Report Details step if you

add fields from related modules to the display column. Please note that if you want your report to include records whether or not they have data in the fields, you will need to mark the displayed module relationship(s) in the Optional Related Modules section. For example, if you add the email address field as a display column for the New Leads report, the Optional Related Modules section will display "Leads > Email Address". Check the box for the Email Address relationship in order to include all applicable results even if the lead record does not contain an email address. By default, Sugar treats all related modules in a report as mandatory meaning that an email address will be required for a lead record to be included.

Leaving this box unchecked will exclude all lead records from your report that do not have an email address associated with them.

This holds true for all related modules. You will need to check the box for any relationship you do not wish to be treated as mandatory when Sugar is generating your report. In order to report on records with no related records of a particular module (e.g. Contacts without a related Account) using a filter such as Contacts > Accounts > Name > Is Empty, the Optional Related Modules will also need to be checked.

Show Query

The Show Query option is only visible to system administrators and displays as a checkbox on the Report Details step. If the Show Query box is checked and the Preview button is clicked, the generated report will display all the SQL queries at the bottom of the page for administrators to use and analyze how the specific data was retrieved in the system.

Rows and Columns Report : Select Module > Define Filters > Choose Display Columns > **Report Details**

< Back   Save   Preview   Save and Run   Delete   Cancel

Report Name: *   Customer Account List

Show Query: ☐

Assigned to: *   Max Jensen   Select

Reports Detail View

The Reports detail view displays thorough report information including display column fields (if applicable), charts (if applicable), etc. The detail view can be reached by clicking a report record's link from anywhere in the application including from the Reports list view. The detail view's Actions menu appears on the top left of the page and allows you to perform various actions on the current report.

Please note that your access to reports and the displayed results in a report will vary according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Favorite Designation

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

Customer Account List ★

Title: Customer Account List

Run Report ▾

Run-time Filters

Run-time filters allow you to quickly change the filter values on the report without having to edit the report. Please note that run-time filters only appear if filters are

set in the Define Filters step when building the report. The report will be filtered based on the original filter value, but you can change the value via the Run-time filter and click "Apply" or "Run Report" to re-generate the report result. For more information on run-time filters, please refer to the Run-Time Filters section.

Report Details

By default, the report details box will appear displaying the report's name, display columns, report type, team(s) assigned to report, etc. To hide the report details, simply click the Hide Details button on the upper left of the report's detail view. Once the report details are hidden, the Show Details button will appear in place of the Hide Details button. Click the Show Details button to display the report details again.

Report Chart

Users have the option to display the data as a chart which then allows users to drill into each segment to display the associated records. The chart option is available for Summation with Details-type, Summation-type, and Matrix-type reports. You can choose a type of chart for display via the Chart Options step of the Report

Wizard. Please note that at least one group-by and one calculated display summary (e.g. Count, AVG: Likely, SUM: Likely) must be selected in order to be able to display a chart.

The chart is displayed with the report by default and its visibility can be toggled using the Hide/Show Chart button. After running the report, you can hover on a segment of the chart to view the corresponding chart values. Clicking on a segment will open a drawer containing a list of the records making up that segment. For more information, refer to the Drilling Through Report Charts section below.

User Name ⇕	Month: Expected Close Date ⇕	SUM: Likely ⇕
sally	June 2017	$50,337.00
chris	June 2017	$30,790.00

Note: When you make a chart in the Reports module, there is a limit to the number of groups allowed. The limit is 50 groups for all charts except funnel, for which the limit is 16. The limit only applies to charts. If the number of elements is more than 50 (or 16 for funnel), then an error message is displayed at runtime.

Report charts can also be added and displayed as a Sugar dashlet on your Home page. These Saved Report Chart dashlets also allow for drilling through to access the associated records. For more information on adding report charts as dashlets, refer to the Home documentation. Please note that at least one group-by and one Display Summary column is required to generate a chart.

Drilling Through Report Charts

In order for drill-through to work for a given report chart, the following conditions must be met:

- When viewing from the Reports module, the report has been run by navigating to the report's detail view, clicking the Run button, or clicking "Save and Run" after editing. Drill-through is not supported when previewing a report during editing.
- When viewing from a dashboard, you are viewing a Saved Reports Chart dashlet. Drill-through is not supported for other dashlets containing charts (e.g. Pipeline dashlet).
- The base module of the report is a Sidecar module. For more information, refer to the User Interface documentation.
- The report is not grouped by a DateTime-type field such as Date Created or a Multiselect-type field. Reports grouped by aggregate DateTime-fields (e.g. Month: Date Created) do support drill-through. For more information on field types, refer to the Studio documentation.

Clicking a segment of a report chart will open a drawer containing a filtered list view showing the records belonging to that segment. To the right of the list view is the chart with the currently selected segment highlighted. The segment's applied filter will also be noted above the list view (e.g. "User Name: max").

The following operations are available when drilling through a report chart:

- **Select a new segment** : Click a different chart segment to update the list view filters and show the new segment's associated records.
- **Cancel** : Click the Cancel link to close the drawer and return to the

previous view.

- **Refresh list and chart** : Click the Refresh button to update and reload the filtered list view results and chart.
- [Display columns]() : Click the Gear icon to choose which fields to display.
- **Open records** : Click the name of a record in the list to open it in record view.
- [Preview records]() : Click the Eye icon to the right of any row to preview that record. Please note that editing records via the preview panel is not supported while drilling through a chart.
- [Favorite designation]() : Click the star on the left of a record's row to toggle it as a favorite. A dark gray star indicates that the record is a favorite while a white star indicates it is not.
- [Record Actions menu]() : Click the triangle to the right of any row to access the Record Actions menu to edit, follow, or delete specific records from the list view.
- [Checkbox selection]() : Mark the checkbox on the left of each record row to select individual records from the list view. Click the checkbox to the left of the Mass Actions menu to select all records displayed on the current set of list view results.
- [Mass Actions menu]() : Click the triangle to the right of the checkbox option to access the Mass Actions menu to perform various actions (e.g. Mass Updates, Delete) on the currently selected records.

Report Chart Options

The Chart Options step of the Report Wizard allows users to choose the chart type that they want to be displayed on the generated report as well as how to summarize the data within the chart. Please note that at least one of the calculated fields (e.g. Count, AVG: Amount, SUM: Amount) in the Choose Display Summaries step must be selected in order to be able to select a chart type in the Chart Options step.

The following options are available in the Chart Options step of the Report Wizard:

- **Chart Type** : Select the type of chart that you want to display on your report. The available chart types are:

- **No Chart** : The report will not have a chart.
- **Horizontal/Vertical Bar (Stacked)** : Categorical data will be displayed as rectangular bars with heights or lengths proportional to the values that they represent. When a secondary grouping exists, the values will be proportionally stacked within the bars as color blocks.
  - **Note**: For the Saved Reports Chart Dashlet, this chart type can be used by selecting the chart type "[Horizontal/Vertical] Bar Grouped Chart" and leaving "Stack Data Series" disabled in the bar chart display options.
- **Horizontal/Vertical Bar (Grouped)** : Categorical data will be displayed as rectangular bars with heights or lengths proportional to the values that they represent. When a secondary grouping exists, clusters of bars will be proportionally organized within each primary grouping.
  - **Note**: For the Saved Reports Chart Dashlet, this chart type can be used by selecting the chart type "[Horizontal/Vertical] Bar Grouped Chart" and enabling "Stack Data Series" in the bar chart display options.
- **Pie** : Most useful or visualizing numerical proportions, a pie chart will depict data as proportional sections where the sum of all data is 100%.
- **Funnel** : Most useful for visualizing values across multiple stages in a linear process, funnel charts should be used to show values in decreasing order as data points are filtered out at each stage.
- **Line** : Line charts are only available when a report has two or more group-by columns. Line charts will comprise a series of data points connected by line segments and are useful for displaying data trends over time.

- **Data Series** : Select the data that you want to be summarized by the chart. The field(s) you selected in the Choose Display Summaries step will be available to choose in this dropdown list.

- **Description** : Enter a brief description to label the chart.
- **Round Numbers Over 100000** : Enable this option if you want numbers over 100,000 to be rounded to the nearest thousand in the report charts. For example, 150,000 will be displayed as 150K.

Report Results

The report's detail view will display the report results with relevant data and report chart (if applicable) for all records that meet the specified criteria. Please note that each report type will display the report results differently and users should consider how they would like to view the data prior to creating the report.

Rows and Columns Report Result

The report results for this report type displays the data in simple rows and columns format. The display column field values for all records that meet the specified criteria will appear on the report result. You can view a record's details by clicking on the record's name. You can also sort the report results by a display column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the report may be sorted by only one column at a time. To view an example Rows and Columns report result, please refer to the creating [Rows and Columns Report](#) section.

Subject ⇕	Status ⇕	Date Created ⇕	User Name ⇕
Discuss review process	Scheduled	04/10/2017 16:43	chris

(1 - 3 of 3)

Summation Report Result

The Summation Report provides an overview of the selected field data(s) grouped by specific criteria(s). The report result displays the data in groups summarized using computed derivatives (e.g. SUM, AVG, MAX, MIN) from numeric-type field values (e.g. Likely) as well as weighted amounts. Each field you select in the Define Group By and Choose Display Summaries steps will be displayed as a column in the report result. The field(s) in the Define Group By list determines how the data will be grouped on the report results table and the chart. For example, if you group the opportunity report by "User Name" then "Month: Expected Close Date" on the Define Group By list, the opportunity records will be grouped by the user assigned to the opportunity and each user will be broken up by month of the expected close date in the report results. The grand total of the summarized field values will display at the bottom of the report results page.

You can sort the report results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the report may be sorted by only one column at a time. To view an example

Summation report result, please refer to the [Creating Summation Report](#) section.

User Name ⇕	Month: Expected Close Date ⇕	SUM: Likely ⇕
sally	June 2017	$50,337.00
chris	June 2017	$30,790.00

Summation Report with Details Result

The Summation Report with Details groups the data and displays the total summary count for records in the report result. Unlike the Summation Report, this report type includes display columns for fields related to the target and related module. The report result will group the data in different categories based on the specified field values. If you choose to display the data as a chart, it will appear at the top of the report results page. The field values for all records that meet the specified criteria will be displayed in a rows and columns type table broken up into grouped panels. You can sort the report results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header (e.g. Expected Close Date) noting that the fields which allow sorting will have a pair of arrows. Please note that the report may be sorted by only one column at a time. You can also view the record's details by clicking the record name.

Each panel header will display the grouped by field value(s) along with the total summary count for the group. You can collapse the grouped panels individually by clicking the double up arrow to the far left of the header or click "Collapse All" to collapse all panels. Collapsed panels will display the header with the display summaries for each group and you can click the double down arrow to open the panels again. The grand total for the summarized field values will appear at the bottom of the report results page. To view an example Summation with Details report result, please refer to the [Creating Summation Report with Details](#) section.

Collapse All

Month: Expected Close Date = January 2016, SUM: Likely = $208,272.56

Opportunity Name ⇕	Expected Close Date ⇕	Opportunity Amount ⇕	Sales Stage ⇕
Spindle Broadcast Corp.	01/30/2016	$50,950.00	Closed Won
Chandler Logistics Inc	01/27/2016	$51,683.00	Closed Won
Complete Holding	01/29/2016	$36,522.00	Closed Won
Cumberland Trails Inc	01/29/2016	$41,645.56	Closed Won
Tortoise Corp	01/29/2016	$27,472.00	Closed Won

Month: Expected Close Date = February 2016, SUM: Likely = $201,649.55

Matrix Report Result

The Matrix report groups the fields based on the group-by fields and displays the summary for specific numeric-type field values that you select. The report result displays the data in a grid table with row and column headers. If you selected three group-by columns, then you will have the option to choose specific report layout's (e.g. 1x2 and 2x1) on the Report Details step. The 1x2 layout option will display the data for the first group-by field in a row and display the data for the other two group-by fields in columns. The 2x1 layout option will display the data for the first two group-by fields in rows and display the data for the third group-by field in a column. The report results will show the grand total for each field row on the table as well as for each column. To view an example Matrix report result, please refer to the [Creating Matrix Report](#) section.

User Name	Month: Expected Close Date				Grand Total
	February 2013	January 2013	March 2013		
chris	$155,000.00				$155,000.00
max		$75,000.00	$100,000.00		$175,000.00
sally		$50,000.00			$50,000.00
Grand Total	$155,000.00	$125,000.00	$100,000.00		$380,000.00

Viewing Currency Fields

When the viewing user's profile has the Show Preferred Currency option selected, all currency values will be displayed in reports using the user's preferred currency. The values will use the current conversion rate set in Admin > Currencies at the time the report is run. This means that the displayed value may not be historically correct for closed business since the conversion rate of the user's preferred currency may have changed since the purchase was completed.

When the user does not have this option selected, reports will display all currency values in the system's default currency. To keep amounts historically accurate, the conversion rate will only update on on currency fields when the business is still open and under the following scenarios:

- The record undergoes a save event (e.g. mass update, manual save) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all records saved with that currency to the new rate.

For more information about currency exchange rates, please refer to the [System](#) documentation in the Administration guide.

Running Reports

Once the reports are generated and saved in Sugar, you can view the report results at any time. While viewing the report's detail view, there may be times when you need to re-run the report to generate new report results. The Run Report button on the upper left of the report's detail view allows you to refresh and run the report to re-generate report results. For example, if you make a change to the run-time filter on the report, you can click "Run Report" to generate the report based on the new filter values. For more information on run-time filters, please refer to the Run-Time Filters section. You can also click "Run Report" each time you want to re-generate the report to capture new records not included in the current report results.

Editing Reports

Reports may be edited at any time to refine or adjust the report's details or criteria. There are various methods of editing the report from the Reports detail view and Reports list view. Regardless of where you initiate the edit, you will always go through the Report Wizard to make the necessary changes to your report.

You can edit the report by going through the Report Wizard step-by-step using the Back and Next button or by clicking the step's link (e.g. Define Filters, Choose Display Columns, Choose Display Summaries) in the breadcrumbs at the top of the Report Wizard. When ready, click "Save and Run" to preserve the changes made and generate the report. If any users have created a scheduled report based on the edited report, the changes will automatically be reflected the next time they receive a copy of the report.

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

Editing via Detail View

You can edit reports via the detail view by clicking "Edit" in the Actions menu on the upper left of the page. This will open the Report Wizard where you can make the necessary updates to the various steps (e.g. Define Filters, Define Group By, Choose Display Columns, Choose Display Summaries). Once the changes are complete, click "Save and Run" to preserve the changes made and generate the report again.

Deleting Reports

If a report is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Reports detail view or list view. Deleting via the detail view allows you to delete a single report while the list view allows for deleting one or more records at a time. Deleting a report from Sugar will also delete any report schedule records related to the report.

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

Deleting via Detail View

Use the following steps to delete a report via the detail view:

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

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

Exporting Reports

The Export option allows users to export a report's results as a CSV file. For more information on exporting records in Sugar, please refer to the Export documentation. Please note that your ability to export reports from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

Exporting reports is useful when you need to use Sugar data with other software

such as Microsoft Excel. You can also use exported report results to update existing Sugar records by creating a report (including Record ID's), exporting, making changes, then importing the altered data back into Sugar. For more information on updating existing records via import, please refer to the [Import](#) documentation.

Note: Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a report with a large amount of data. If you encounter an error when performing this action, we recommend breaking up the report into smaller batches.

Printing Reports as PDFs

Sugar's Print as PDF option in the Reports module allows users to download the reports to PDF files onto their local machine. This may be useful when needing to email the file to other members of the team to share the report data or to keep track of key historical data from the system. You can also view charts on the downloaded PDF files for Report types (e.g. Summation Report with Details, Summation Report, Matrix Report) with chart options.

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

Use the following steps to download a copy of a report as a PDF file via the Reports detail view:

1. Navigate to a report's detail view.
2. Select "Print as PDF" from the Actions menu.

3. Open the downloaded PDF file to view the report and save to your local machine if you wish.

Scheduling Reports

Users can schedule regular email deliveries of Sugar reports to themselves and other Sugar users via the Reports Schedule module. Scheduled reports will be delivered as PDF file attachments to the users' primary email addresses in Sugar. When scheduling a report, you can choose the date and time to start sending reports and at what interval you wish to continue receiving them. If you choose to receive the report at a specified time of day, Sugar will output the report and email it to you at that time according to the time zone set in your user profile. If you are configuring the scheduled report for multiple users, then Sugar will convert the time of day to UTC so that each user receives the report simultaneously regardless of their time zones.

Note: Scheduled reports may arrive after the set time based on the cycle increment set by your administrator for the Run Report Generation Scheduled Tasks scheduler. For more information, please refer to the [Report Schedule Requirements](#) section.

Please note that your ability to schedule reports from Sugar may be restricted by your role settings. Check with your system administrator if you do not see the option to schedule a report. Furthermore, delivery to users added to a scheduled report may be prevented by teams or roles. For example, if a user schedules a report for a user who does not have access to the report, then the restricted user will not receive the report. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide.

Note: Reports that contain charts in Sugar will not have a chart in the PDF version of the scheduled report.

Report Schedule Requirements

The Report Schedules module requires the following configurations:

- **User email settings** : A personal outgoing email account must be configured by the user scheduling a report. For more information on setting up individual email accounts, please refer to the [Emails](#) documentation in the Application guide.
- **System mail server** : The outgoing mail server for the Sugar system must be configured by an administrator. For more information on setting up the system email settings, please refer to the [Email](#) documentation in the Administration guide.
- **Scheduler activation** : The Run Report Generation Scheduled Tasks scheduler must be activated by an administrator (default is inactive) and configured to run at proper intervals. For example, if the scheduler is set to trigger once per day and a user schedules a report to be delivered every hour, the report will only be delivered once each day due to the interval set

in the scheduler. The administrator must change the interval for the scheduler to run at least every hour for the user's report to be delivered hourly. For more information on configuring schedulers, please refer to the [Schedulers](#) section of the System documentation.

Report Schedule Fields

The Report Schedules module contains the following fields:

Field	Description
Active	The enabled (Active = true) or disabled (Active = false) state of the scheduled report event **Note**: Disabled report schedule records will not send emails.
Assigned to	The Sugar user assigned to the report schedule record **Note**: The Assigned To user is not always the same user as the recipient of the scheduled report.
Created by	The Sugar user who created the report schedule record
Date Created	The date and time that the report schedule record was created
Date Modified	The date and time that the report schedule record was last modified
Description	A description or other information about the scheduled report event
Name	A unique and descriptive name for the scheduled report event
Next Email Scheduled For	The date and time that the next report will be emailed to the recipient(s)
Repeat Type	The interval of time between recurrences
Report	The related Report that will be emailed as a PDF file attachment to the recipient(s)
Start Date	The date and time that the first report will be emailed as a PDF file attachment to the recipient(s)

Teams	The Sugar team(s) with access the scheduled report record (subject to role permissions)

In addition to the Report Schedule fields, the Users subpanel under a report schedule record contains the following User module fields:

Field	Description
Department	The department where the user works as saved in their user profile
Full Name	The user's first and last name
Status	The status of the user's record (e.g. Active or Inactive)
Title	The user's title as saved in their user profile
User Name	The user's Sugar username

Please note that the Report Schedule fields and the fields in the Users subpanel cannot be edited via Studio.

Creating Report Schedules

Use the following steps to schedule an automated report for delivery to your email inbox:

1. Navigate to the Reports module and create a new report schedule via one of the following methods:
   - The actions menu on a report's detail view:

   - The report's actions menu in the Reports list view:

- Via the Report Schedules module directly:
  - Use the Report Schedules link in the Reports module tab and then click the Create button at the top of the list view:

2. If necessary, use the Search and Select functionality to choose a report in the Report field. This will only be necessary when scheduling a report via the Create button in the Report Schedules module.
3. Give the scheduled event a descriptive name that you can find later. For example, "Will's daily call list - 9am".
4. Complete the Repeat Type and Start Date fields with the frequency of delivery and desired date and time to receive your first emailed report. Optionally, add a description. For more information on the available fields, please refer to the Report Schedule Fields section.

5. Click "Save".

After saving, you can view the report schedule record to edit, disable (i.e. set "Active" to false), or delete the scheduled email as your role permits. If you would like to add more users to the distribution list for the scheduled report, please refer to the Adding Users to Report Schedules section.

Adding Users to Report Schedules

Use the following steps to schedule an automated report for delivery to the email inboxes of other Sugar users:

1. Follow the steps in the [Creating Report Schedules](#) section to create a scheduled report for yourself. If you do not want to receive this scheduled report, you still need to create the record for yourself but can unlink your user record in the following steps.
2. Next, navigate back to the report schedule record by clicking the link in the confirmation message or using the [View Schedules](#) option on the related report record.

3. On the report schedule's record view, scroll down to the Users subpanel.
4. Click on the subpanel's Actions menu and select "Link Existing Record".

5. Find and select the user or users you would like to add to the scheduled report's distribution list and then click "Add".
6. To remove users from the distribution list, click the Unlink button next to the user's name in the Users subpanel for the report.

Copying Report Schedules

Users with the appropriate role permissions can schedule new reports via duplication, which will copy the entire user recipient list over to a new report schedule record. Simply select "Copy" from a report schedule record's actions menu. Give the copy a unique name, update the related report field and scheduled times as needed, and save. The related user recipients will copy over to the new report schedule record.

If needed, you can add more users to the distribution list or remove users by clicking the Unlink button next to a user's name in the Users subpanel.

Viewing Report Schedules

You can navigate directly to the Report Schedules module to access the Report Schedules list view. There is a link to the Report Schedules module in the Reports module tab menu:

In addition, you can view only the scheduled reports related to a given report using the "View Schedules" option on the report's actions menu in list view or detail view. When using "View Schedules" from a report's actions menu, Sugar will automatically filter the Report Schedules list view to show only records related to that report.

Click on the name of a record to view its details and edit or add users to the report schedule. To disable a report schedule, deselect its Active checkbox and save. For more information on working with list views and editing records in Sugar, please refer to the User Interface documentation.

Favoriting Reports

Users have the option to mark records as favorites via the report's detail view. This allows users to designate records that are important or will be viewed often so that they can easily be accessed via the search filter or from the Reports module tab.

Favoriting via Detail View

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

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

Sharing Reports

Individual reports can be shared with other users in your organization by sending

an email containing the record's link directly from the detail view. In the report's detail view, select "Share" from the Actions menu. This will open a Compose Email window that includes the URL of the report in Sugar. Enter the recipient(s) email address in the To field then click "Send".

Users can simply click the link in the email to access the report in Sugar. Please note that the user must be logged into Sugar in order to access the record, and its visibility will depend upon their team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

Note: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.

Adding Report Results to Target Lists

A target list consists of a group of individuals or organizations you wish to be included or excluded from a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. The Reports module gives users the ability to add a large number of records (e.g. Contacts, Leads, Accounts) to a target list at once instead of selecting them one-by-one.

For example, if you need to add all leads in the state of California to a target list, you can create a report based on the Leads module filtered by the Primary Address State field (e.g. CA). After saving the report, navigate to the Target Lists module and select the desired target list record you wish to add the report results to. Scroll down to the Leads subpanel, click the Actions menu, and choose "Select from Reports". Select the saved lead report from the Search and Select Reports drawer and all lead records from the report will be added to the target list.

For more information on adding records to target lists, please refer to the [Target Lists](#) documentation. Please note that Sugar allows up to 1000 records to be added at a time when adding to a target list. If you desire to add more than 1000 records to a target list, you will need to create the reports in several batches.

Last Modified: 2020-02-14 13:29:20

Advanced Reports

Overview

Advanced reports allow users to create custom reports using a single or a combination of SQL statements to directly query your Sugar database. Although the Reports module may be used to create many kinds of reports, users with SQL knowledge may use advanced reports to craft direct database queries for more flexible and extensible reporting.

Advanced reports are a combination of three related modules:

- **Custom Queries** : Custom query records contain the SQL statement used to pull information from the database.
- **Data Formats** : Data format records describe how to format and display the results of the related custom query. Data formats may also be interrelated to create child/parent combinations of queries.
- **Advanced Reports** : Advanced report records serve as headers for the report and may display one or more data format. The advanced report record may also be scheduled to be automatically run and emailed to a user.

Note: You must be an administrator in order to create, edit, and delete custom queries, which are required for the full advanced report. Non-admin users can view advanced reports, custom queries, and data formats according to their team access. Admin users wishing to build advanced reports must first be familiar with SQL and Sugar's database structure in order to write the necessary custom queries.

Advanced Reports Module Tab

Advanced Reports may be accessed by navigating to the Reports module which is typically located on the navigation bar at the top of any Sugar screen. Click the tab

to access triangle to the right of the Reports tab, then click "Manage Advanced Reports" from the actions menu.

From within the Advanced Reports module, clicking the Advanced Reports tab in the navigation bar will display the list view. Click the triangle to the right of "Advanced Reports" to access the Actions menu. Below the Actions menu is the Recently Viewed menu displays the three advanced reports you have most recently opened.

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Advanced Report	Opens the edit view layout to create a new advanced report
View Advanced Reports	Opens Advanced Reports list view to search and display advanced reports
Create Custom Query	Opens the edit view layout to create a new custom query
View Custom Queries	Opens Custom Queries list view to search and display custom queries
Create Data Format	Opens the edit view layout to create a new data format
View Data Formats	Opens Data Formats list view to search and display custom queries
View Reports	Opens the Reports tab to create and view standard reports

Creating Advanced Reports

Since a single advanced report consists of records from three different modules, the following instructions will step through creating a record within each module and relating those records to generate a report. First, a custom query record will

be created, then a data format, and finally an advanced report record. The fields specific to each module are described prior to each set of creation instructions.

Custom Query Fields

The Custom Query module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

Field	Description
Custom Query	The SQL select statement which will retrieve information from the database
Description	A description or other information about the custom query
Lock Query	Option to toggle editability of the Custom Query field
Query Name	The name of the custom query
Teams	The Sugar team(s) assigned to the custom query record

Creating Custom Query Records

Advanced reports enable you to create reports using complex SQL queries that cannot be expressed in standard reports. The SQL query is contained in a custom query record. Each custom query record can be related to multiple data format records which allows it to be reused in multiple reports.

1. Click the triangle in the Advanced Reports module tab to open the actions menu and select "Create Custom Query".

2. Enter appropriate values for the [fields](#) in the edit view layout. All required fields will display a red asterisk and must be completed prior to saving. The SQL select statement you wish to run against the database should be input to the Custom Query field
3. Click "Save".

After you click "Save", Sugar will determine whether the SQL statement provided in the Custom Query field is valid. If it is not, Sugar will display an error message and provide an opportunity for you to correct the SQL. The custom query record may not be saved unless the SQL statement is deemed valid by Sugar.

Data Format Fields

Field	Description
Body Background Color	The color of the background of the data

	cells in the report display
Body Text Color	The color of the text of the data in the report display
Combine with Previous Data Format	Specifies whether space should appear between this table and the previous data format's table when a report includes multiple data formats
Data Format Name	The name of the data format
Description	A description or other information about the data format
Exportable (CSV File Only)	Specifies whether this table is available to be exported as a CSV file
Font Size	The size of the font in the report output
Group with Previous Header	Specifies whether the column widths should match those of the previous data format's table when a report includes multiple data formats
Header Background Color	The color of the header background in the report display
Header Text Color	The color of the header text in the report display
Parent Data Format	When setting up interlocked queries, the parent data format containing the parent query of your current, child query and data format
Query Name	The custom query record which will be formatted by this data format
Report Name	The related advanced report record; this value automatically populates once linked to an advanced report
Sub/Child Query	When this data format is set as the parent format of a child record, the name of the child query will be automatically populated
Show Header	Specifies whether a row including column names should appear above data rows in the report display
Table Width %	The width of the table in the report display as a percentage or pixels
Teams	The Sugar team(s) assigned to the data

	format record

Creating Data Format Records

A data format specifies report formatting details such as the text font, text color, and the background color for a particular SQL query contained in a custom query record. You can reference other data formats within a data format. The query contained in the referenced data format is considered to be the sub-query or the child-query. When a data format references another data format, the data formats are interlocked. Interlocked reports are used to produce information from separate queries in a parent-child pattern. For more information, please refer to the [Interlocked Reports](#) section of this page.

1. Click the triangle in the Advanced Reports module tab to open the actions menu and select "Create Data Format".

2. Enter appropriate values for the [fields](#) in the edit view layout. All required fields will display a red asterisk and must be completed prior to saving. For the Query Name field, type or select the custom query record created in the [steps above](#).
3. Click "Save".

Advanced Report Fields

The Advanced Reports module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

Field	Description
Description	A description or other information about the advanced report
Report Alignment	The alignment of the advanced report text
Report Name	The name of the advanced report
Report Title	The title of the advanced report
Teams	The Sugar team(s) assigned to the advanced report record

Creating Advanced Report Records

1. Click the triangle in the Advanced Reports module tab to open the actions menu and select "Create Advanced Report".

2. Enter appropriate values for the [fields](#) in the edit view layout. All required fields will display a red asterisk and must be completed prior to saving.
3. Click "Save".

Relating the Advanced Report and Data Format Records

After creating all three types of records as described above, use the following steps to relate the advanced report record to one or more data format records:

1. Click the Advanced Reports module tab to access the Advanced Reports list view.
2. Search for the advanced report record created in the steps above and click the record's name to open it in detail view.
3. Below the advanced report information, click the Select button.
4. Find the data format record created in the steps above and click the record's name to link it to the advanced report.

Running Advanced Reports

Finally, click on "Run Report" and it will return a custom report populated with results from your custom query and displayed with your designated data format.

Aggregating Queries on a Single Report

A single advanced report record may relate to one or more data format records, each of which includes its own query. The bottom of an advanced report detail view displays a list of data formats included in the report. When multiple data formats are included on a single report, their individual tables will be stacked. Two [data format fields](), "Combine with previous Data Format" and "Group with Previous Header" will affect how multiple data formats are displayed on a single report.

The following actions are available on an advanced report detail view for manipulating its related data formats:

- **Create New** : Create a new data format record which will be automatically related to this advanced report
- **Select** : Select an existing data format record to relate to this advanced report; only data formats which are not already related to a report and do not have a parent data format will be available for selection.
- **Up** : Move a data format's table to a higher position in a report containing several data formats.
- **Down** : Move a data format's table to a lower position in a report containing several data formats.
- **Edit** : Open the data format in edit view in order to make changes
- **Delete** : Remove the data format from this report; the data format record will not be deleted

Note: data format record can only belong to one advanced report. If you wish to use one custom query with several reports, you must create a separate data format record for each report - each of which may relate to the single custom query record. Also, data formats which have a parent data format (as displayed in the Parent Format field) are considered child data formats and may not be directly added to a report. Parent data formats which have child data formats are eligible to be included on a report.

Adding Multiple Data Formats to a Report

For our example, we will add two different data formats to a single report. First we want to show a list of each of the sales representatives along with a count of how many calls and meetings they made in the last week. This is the first query and the first data format which we have named "Activity Counts".

Beneath this

Interlocking Parent/Child Queries

Sugar allows you to interlock two queries in a parent/child relationship by relating

two data format records. This allows for more complex report results that are displayed in a parent/child format mirroring the queries' relationship. Sugar will first run the parent query, then, for each row of the parent query, it will run the child query.

Use the following steps to interlock a pair of simple queries as an example:

1. Create a custom query record called "All Users Query" with the following SQL statement:
   Select id, user_name from users
2. Create a second custom query record called "Accounts By Users Query" with the following SQL statement:
   Select name, assigned_user_id from accounts where assigned_user_id = '{sub}id{sub}'
3. Create a data format record called "All Users Format" with the Query Name field set to "All Users Query".
4. Create a data format record called "Accounts By Users Format" with the Query Name field set to "Accounts By Users Query" and the Parent Data Format field set to "All Users Format".
5. Create an advanced report record.
6. From the advanced report's detail view, use the Select button to choose "All Users Format".
7. Click the Run Report button.

The '{sub}id{sub}' is inserted to the child query to refer to the parent query's current result row. In this example, Sugar will generate a list of user names and id's. Below each user row, a list of accounts assigned to that particular user will appear. The child query is returning assigned_user_id to help make the functionality clear.

id	user_name
a741218d-bcac-40b4-9126-539a9ca18690	xavier

name	assigned_user_id
Cloud Cover Trust	a741218d-bcac-40b4-9126-539a9ca18690
Smith & Sons	a741218d-bcac-40b4-9126-539a9ca18690

Please note that a child data format cannot be run from it's own record nor added to an advanced report record. Only by running its parent data format or adding its parent data format to a report will the child query's results be displayed.

Note: Only two data formats may be interlocked at a time. Chains of three or more data format records will cause Sugar not to recognize the queries three or more levels deep.

Column-Level Formatting

Each data format includes formatting options such as color, size, etc which affect the entirety of the custom query's table and header. These options are available while editing the data format record and include these fields. In addition, each column of a query's table may be formatted individually using the options available on the detail view of a data format record. Please note, in order for these options to be available, the related custom query must be returning at least one row.

Formatting a Column's Header

Once you have created a data format record including choosing a custom query record which will return at least one row of data, a table will be displayed at the bottom of the data format record's detail view. The following options are available for formatting a particular column's header:

Field	Description
Display Name	Replaces the text of the column's header which defaults to the column name specified in the custom query's SQL statement
Display Type	The display type of this column's header text
Font Size	The size of this column's header text
Font Style	Specifies if the column's header text should be bolded or italicized
Format Type	The displayed format (Month, Quarter, Year, etc.) of this column's header text
Header Background Color	The background color of this column's header
Header Text Color	The text color of this column's header
Wrap Text	Specifies if long text in this column's header should wrap to multiple lines

The following steps will walk through modifying the header to display a desired column name rather than the field name shown by default:

1. Navigate to the detail view of a data format record who's custom query is returning at least one row of data.
2. Click the pencil icon above the table column you wish to format.

3. Check the "Modify Header Attributes" checkbox in the pop-up window.
4. Type "Sally Bronsen's Activities" in the Display Name field and make any other desired modifications.
5. Click "Save" then "Close".

After closing the pop-up window, the table will refresh to show the changes you made to the column. For our example, the column name "activity_type" has been replaced with the text "Sally Bronsen's Activities".

Formatting a Column's Body

Once you have created a data format record including choosing a custom query record which will return at least one row of data, a table will be displayed at the

bottom of the data format record's detail view. The following options are available for formatting a particular column's data cells:

Field	Description
Body Background Color	The background color of this column's data cells
Body Text Color	The text color of this column's data cells
Font Size	The size of this column's data cell text
Font Style	Specifies if this column's data cell text should be bolded or italicized
Format Type	Specifies if this column's data cell text should be formatted as plain text, currency, date, or datetime values
Table Width	The width of this column's data cells and header as a percentage of the table width or as an absolute number of pixels
Wrap Text	Specifies if long text in this column's data cells should wrap to multiple lines

The following steps will walk through modifying a column to display a column of datetime data as a simple date value as an example:

1. Navigate to the detail view of a data format record who's custom query is returning at least one row of data.
2. Click the pencil icon above the table column you wish to format.

3. Check the "Modify Body Attributes" checkbox in the pop-up window.
4. Choose "Date" for the Format Type field and make any other desired modifications.
5. Click "Save" then "Close".

After closing the pop-up window, the table will refresh to show the changes you made to the column. For our example, the column of database datetime values will now be displayed as simple date values.

Hiding Columns

If an individual column should not be displayed in a report's output, the column may be marked as hidden on the data format record. This will prevent it from being displayed when running an advanced report which includes the data format.

Use the following steps to hide a column from a report's output:

1. Navigate to the detail view of a data format record who's custom query is returning at least one row of data.
2. Click the pencil icon above the table column you wish to format.

activity_name	activity_date	status
‹ ✎ ›	‹ ✎ ›	‹ ✎ ›
Discuss review process	2014-06-02 14:30:00	Held
Discuss pricing	2014-06-02 17:30:00	Planned
Follow-up on proposal	2014-06-06 18:30:00	Held

3. Select the Hide Column in Report checkbox.
4. Click "Save" then "Done".

Reordering Columns

 The default column order of a table is determined by the SQL statement used in the custom query record. The column order can be changed at the data format record level when a different order is desired on the data format or in the final advanced report record.

Use the following steps to change the column order for a data format record:

1. Navigate to the detail view of a data format record who's custom query is returning at least one row of data.
2. At the top of a column, click the right arrow to move the column one position right. Click the left arrow to move it one position left.

Activities Query - 1 Month - Sally Bronsen

↪ Export

Sally Bronsen's Actvities	Contact Name	Account Name
‹ ✎ ›	‹ ✎ ›	‹ ✎ ›
Call	Britt Jefferson	Sea Region Inc
Meeting	Britt Jefferson	Sea Region Inc
Meeting	Lilian Millington	Draft Diversified Energy Inc
Meeting	Omer Humble	Smallville Resources Inc

Scheduling Advanced Reports

Advanced reports can be scheduled to be emailed to users periodically based on

specified date and time intervals. Please note that each individual user has to schedule the report in their Sugar account in order for the reports to be delivered to them. Sugar will run the advanced report at the specified interval based on the set time zone in user preferences and send the data output as a CSV file to the email address associated with your profile.

The outbound mail server for the system as well as the user's email settings must be configured properly in order for the reports to be delivered successfully. For more information on setting up the system email settings, please refer to the Email documentation in the Administration guide. For more information on setting up your user preferences' email settings, please refer to the Getting Started documentation.

The Run Report Generation Scheduled Tasks scheduler in Sugar processes all scheduled advanced reports to be delivered to the user at the scheduled interval. By default, this report scheduler is set as "Inactive" for new Sugar installations. Administrators must check to make sure that the Run Report Generation Scheduled Tasks scheduler is active and the settings (e.g. interval) are configured properly. F or example, if the scheduler is set to trigger once per day and a user schedules a report to be delivered every hour, the report will only be delivered once each day due to the set interval in the scheduler. The administrator must change the interval for the scheduler to run every 1 hour in order for the user's report to be processed and delivered per their scheduled interval. For more information on configuring schedulers, please refer to the Schedulers section of the System documentation.

Scheduling Via List View

Use the following steps to schedule an advanced report via the list view:

1. Navigate to the Advanced Reports list view.
2. Click "-- None --" in the Schedule Report column of the report you wish to schedule. If you wish to update an existing schedule, click the date shown in the Schedule Report column.

3. In the pop-up window, enter the start date/time and select the time interval for report delivery. Check the Active checkbox then click "Update Schedule" to schedule your report.
   ○ Please note that you must mark the Active box in order to activate

the report schedule.

Once the report is scheduled successfully, the date and time for the scheduled report will appear in the list view row for the specific advanced report.

Exporting Data Formats

Sugar's Export option allows users to download the data in individual data format tables as a .csv (comma-separated values) file. This may be useful when needing to use the report data with other software such as Microsoft Excel. In order for the tables belonging to an advanced report or data format record to be available for export, the data format record's "Exportable (CSV File Only)" field must be checked.Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a table with a large amount of data. If you encounter an error when performing this action, we recommend breaking up the queries in smaller batches. For more information on exporting records in Sugar, please refer to the [Export](#) documentation. Please note that your ability to export reports from Sugar may be restricted by a role. For more information on roles, please refer to the [Role Management](#) documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

Exporting Via Advanced Reports

Use the following steps to export a data format table from an advanced report:

1. Open an advanced report record in detail view by selecting it from the Advanced Reports list view or the list of recently viewed reports in the actions menu.
2. Click "Run Report" at the top of the detail view.
3. Click "Export" above the desired table in order to start the download.
   Note: If the "Export" link is not displayed, you must edit the data format record and check "Exportable (CSV File Only)".

Exporting Via Data Formats

Use the following steps to export a data format table from a data format record:

1. Navigate to the detail view of a data format record who's custom query is returning at least one row of data.
2. Click "Export" above the desired table in order to start the download.
   Note: If the "Export" link is not displayed, you must edit the data format record and check "Exportable (CSV File Only)".

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Stock Reports

Overview

Sugar's Reports module comes with a number of pre-built, stock reports. These reports display information from Sugar modules (e.g. Accounts, Contacts, Opportunities, etc.) that will help provide insights into your CRM data. This page lists each of the stock reports that come out-of-the-box with the current version of Sugar and helps explain the type of information provided in each report.

Please note that Sugar ships with over 100 stock reports, which may vary by version. For descriptions of stock reports that shipped with previous versions of Sugar, please refer to the [Understanding Legacy Stock Reports](#) article. In addition to stock reports, users can create their own reports. For more information on creating reports, please refer to the [Reports](#) documentation.

Viewing Stock Reports

All of Sugar's stock reports can be accessed via the Reports module. From the Reports list view, stock reports can be identified using [stock report tags](#) and [stock report filters](#). You may also preview a stock report from list view to read its description and other information from the [report's fields](#). For more information on previewing reports, please refer to the [User Interface](#) documentation.

If you do not see the Reports module tab in the navigation bar, please check your user profile to see if the module may be marked as hidden. For more information on hiding and displaying modules, please refer to the [Getting Started](#) documentation. If the Reports module is not marked as hidden in your user profile,

then check with your administrator to confirm that the module is enabled for your instance. Please note that team and role restrictions also apply to report results and affect what records users can see when they run the reports. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation.

Stock Report Tags

Stock reports are automatically tagged in Sugar with the "Stock Report" tag. Each report also has a category tag such as "Administration" or "Sales and Marketing". The reports listed on this page under [Stock Reports by Category](#) are organized by the reports' category tags in Sugar. Users can filter the Reports list view by tag as explained in the [User Interface](#) documentation.

Stock Report Filters

The Reports list view search provides a filter option that allows users to narrow the list of visible reports. In addition to the [default module filters](#), the following filters are available for the Reports module:

- **Stock Reports** : Filter the list view to show only stock reports.
- **Non-Stock Reports** : Filter the list view to hide all stock reports.
- **With Charts** : Filter the list view to show only reports designed with charts.

Users can further refine the results by typing a search query in the search bar and can create and save their own custom filters. For more information on searching and filtering the list view, please refer to the [Search](#) documentation.

Editing Stock Reports

Any user with the proper team and role permissions may edit a stock report as they would [edit any other report](#), but it is not recommended. Instead, we recommend [duplicating the report](#) and saving the edited copy with a new name and description. This will preserve the stock report's state as it was made by Sugar. To copy a stock report, simply follow the steps in the [Reports](#) documentation to create a report via duplication. For more information on restoring deleted stock reports, please refer to the [Restoring Deleted Stock Reports](#) section of this page.

Stock Reports by Category

The reports on this page have been shipped with the current version. For more information on reports that shipped with previous versions but are no longer being shipped in current versions of Sugar, please refer to the Understanding Legacy Stock Reports article.

Administration Reports

The following reports were designed for administrators to gain insight into teams and users, usage patterns, and the performance of their Sugar instance. The reports in this section are tagged "Stock Report" and "Administration" in the Reports module.

Note: The tracker settings must be enabled via Admin > Trackers before tracker data becomes reportable in Sugar. Please refer to the Understanding Tracker Reports article for in-depth descriptions of each stock tracker report.

Name	Module	Type	Chart Type	Description
Active User Sessions (Last 7 Days)	Tracker Sessions	Rows and Columns		Lists the duration of all user sessions over the last 7 days
Licensed User List	Users	Rows and Columns		Administrators can refer to this report in order to periodically check the number of active users counting against their license and ensure that they are not close to exceeding their limit.
List of Teams and Licensed Users	Teams	Summation with details		Provides the list of teams and the number users in the team.

				Group and portal users are excluded in this list.
Modules Used By My Direct Reports (Last 30 Days)	Trackers	Summation	Horizontal Bar	Displays a summary of module usage in the past 30 days for all users who report to the user who is running the report
My Module Usage (Last 30 Days)	Trackers	Summation	Horizontal Bar	Displays a summary of module usage in the last 30 days for the current user
My Module Usage (Last 7 Days)	Trackers	Summation	Horizontal Bar	Displays a summary of module usage in the last 7 days for the current user
My Module Usage (Today)	Trackers	Summation	Horizontal Bar	Displays a summary of module usage so far today for the current user
My Recently Modified Records (Last 30 Days)	Trackers	Rows and Columns		Lists records assigned to the current user that were saved in the last 30 days
My Records Modified (Last 7 Days)	Trackers	Rows and Columns		Lists records assigned to the current user that were saved in the last 7 days

My Usage Metrics (Last 30 Days)	Tracker Performance	Summation		Shows the total server response time in seconds, total number of database round trips, and total number of files accessed for the user who is running the report in the last 30 days
My Usage Metrics (Last 7 Days)	Tracker Performance	Summation		Shows the total server response time in seconds, total number of database round trips, and total number of files accessed for the user who is running the report in the last 7 days
My Usage Metrics (Today)	Tracker Performance	Summation		Shows the total server response time in seconds, total number of database round trips, and total number of files accessed for the user who is running the report so far today
Records Modified By My Direct Reports (Last 30 Days)	Trackers	Rows and Columns		Lists records saved in the last 30 days by users who report to the user who is

				running the report
Slow Queries	Tracker Queries	Rows and Columns		Lists the details for queries that took longer than the query threshold limit defined in Admin > Trackers
User Sessions Summary (Last 7 Days)	Tracker Sessions	Summation		Summarizes the number of session roundtrips and total active time for each user over the last 7 days
Users Usage Metrics (Last 30 Days)	Tracker Performance	Summation		Shows the total server response time in seconds, total number of database round trips, and total number of files accessed for each user in the last 30 days
Users Usage Metrics (Last 7 Days)	Tracker Performance	Summation		Shows the total server response time in seconds, total number of database round trips, and total number of files accessed for each user in the last 7 days

Customer Service Reports

The following reports will help customer service users and managers gather important information about cases and bugs in Sugar. The reports in this section are tagged "Stock Report" and "Customer Service" in the Reports module.

Name	Module	Type	Chart Type	Description
Bugs by Product Category by Status	Bugs	Matrix	Horizontal Bar	Number of bugs created by category and their current status. This report gives a sense of which area of the product generates bugs. Time period can be adjusted in the report using run time filters.
Bugs Created by Month By Category	Bugs	Matrix	Vertical Bar	Number of bugs created each month summarized by the category. This report provides a trend on the number of bugs being generated across category.
Bugs Created by Month By Priority	Bugs	Matrix	Vertical Bar	Number of bugs created each month summarized by their priority. This report provides a trend on the number of

				bugs.
Cases with No Calls, Meetings, Tasks, or Emails	Cases	Matrix		Summary count of cases where no activity has taken place or is scheduled. Those cases are counted that have no calls, meetings or tasks scheduled or completed.
My Open Bugs by Priority	Bugs	Summation	Pie	List of open bugs assigned to the user who is running the report summarized by priority.
My Open Cases by Priority	Cases	Summation	Horizontal Bar	List of open cases assigned to the user who is running the report summarized by priority.
New Cases By Month	Cases	Summation	Vertical Bar	List of new cases opened by month
Open Bugs by User by Priority	Bugs	Matrix		Number of bugs assigned to each user grouped by priority of the bug. This report gives a sense of which bugs needs attention the most.
Open Bugs by User by Status	Bugs	Matrix		Number of bugs assigned to each user

				and the priority of the bug. This report gives a sense of the workload of users working on the bugs.
Open Cases By Month By User	Cases	Summation	Vertical Bar	List of open cases by created month and grouped by user.
Open Cases by User by Priority	Cases	Matrix	Horizontal Bar	Number of cases assigned to each user and the priority of the bug. This report gives a sense of the workload of users working on the cases.
Open Cases by User by Status	Cases	Matrix	Horizontal Bar	Number of cases assigned to each user and the current status of the bug. This report gives a sense of which cases needs attention the most.
Summary of Bugs by Priority by Week Created	Bugs	Matrix	Vertical Bar	Number of bugs created each week by priority. Time period can be adjusted in the report using the run time filters.
Summary of Bugs by Source	Bugs	Matrix	Vertical Bar	Number of bugs created

by Week Created				each week by source. Time period can be adjusted in the report using the run time filters.
Summary of Bugs by Status by Week Created	Bugs	Matrix	Vertical Bar	Number of bugs created each week by status. Time period can be adjusted in the report using the run time filters.
Summary of Cases by Priority by Week Created	Cases	Matrix	Vertical Bar	Number of cases created each week by priority. Time period can be adjusted in the report using the run time filters.
Summary of Cases by Source by Week Created	Cases	Matrix	Vertical Bar	Number of cases created each week by source. Time period can be adjusted in the report using the run time filters.
Summary of Cases by Status by Week Created	Cases	Matrix	Vertical Bar	Number of cases created each week by status. Time period can be adjusted in the report using the run time filters.
Summary of	Cases	Summation	Horizontal Bar	Number of

Open Cases by Priority				cases that are still open summarized by priority of bug.
All Cases Due Today and Overdue*	Cases	Summation	Horizontal Bar	All cases with a follow-up date that has passed or is today. Defaults to all cases with follow-up date in the past 30 days.
All Open Cases by Followup Date*	Cases	Summation with details	Vertical Bar	Number of open cases grouped by the follow-up date.
List of Recently Resolved Cases*	Cases	Rows and Columns		A list of recently closed cases across all business centers. Time period can be adjusted in the report.
My Cases Due Today and Overdue*	Cases	Summation	Horizontal Bar	All cases assigned to the user who is running the report with a followup date that has passed or is today. Defaults to all cases with follow-up date in the past 30 days.
My Cases in the Last Week by Status*	Cases	Summation	Horizontal Bar	Cases modified by the user who is running the report in the last 7 days, grouped by

				status of the case. Time period can be adjusted in the report. This report makes it easy to identify recently worked on cases.
My Cases Resolved this Month by Week*	Cases	Summation	Vertical Bar	This report displays a chart for all cases that were closed in the selected time period and groups them by week
My Open Cases by Followup Date*	Cases	Summation with details	Vertical Bar	Number of open cases assigned to the user who is running the report grouped by the follow-up date.
My Open Cases by Status*	Cases	Summation	Pie	This pie chart shows the percent of cases that are open by status for the user who is running the report.
New Cases by Business Center by Week*	Cases	Summation	Vertical Bar	Number of cases created for each business center by week. Time period can be adjusted in the report.
New Cases by	Cases	Summation	Vertical Bar	Number of

Customer Tier by Week*				cases created by the service level of the customer (customer tier) by week. Time period can be adjusted in the report.
Open cases by Customer Tier and Priority*	Cases	Matrix	Horizontal Bar	A summary of open cases grouped by the service level of the customer (customer tier) and priority.
Recently Created Cases*	Cases	Rows and Columns		A list of all recently created cases across all business centers. Time period can be adjusted in the report.
Status of Open Tasks Assigned by Me*	Tasks	Summation with details	Vertical Bar	Open tasks that the user who is running the report has assigned to others. This report helps users know who to follow up with.
Total Cases Resolved this Month by Agent*	Cases	Summation	Horizontal Bar	Number of cases that were resolved during the month grouped by agent and priority. Time period can be adjusted in the

				report.
Total Cases Resolved this Month by Business Center*	Cases	Matrix	Horizontal Bar	Number of cases that were resolved during the month grouped by business center and priority. Time period can be adjusted in the report.

*This report is only available for Sugar Serve users.

Data Privacy Reports

The following reports will help data privacy managers and marketing users make privacy-related insights and identify leads, contacts, and targets who have opted in to or out of marketing communications. The reports in this section are tagged "Stock Report" and "Data Privacy" in the Reports module.

Name	Module	Type	Chart Type	Description
Count of Contacts by Country	Contacts	Summation		Total count of existing contacts grouped by country.
Count of Leads (unconverted) by Country	Leads	Summation		Total count of existing leads (unconverted) grouped by country.
Count of Targets by Country	Targets	Summation		Total count of existing targets grouped by country.
Data privacy activity completed and rejected each month	Data Privacy	Matrix	Vertical Bar	Number of data privacy activities completed or rejected each month. The

				month is based on date closed.
Data Privacy Activity Due Now	Data Privacy	Summation with details	Horizontal Bar	List of all Data Privacy Activity that is due shortly. Use the run time filter to adjust the time period.
Data Privacy Activity Overdue	Data Privacy	Summation with details	Horizontal Bar	List of all Data Privacy Activity that are still open and the due date is in the past.
List of Contacts with No Consent	Contacts	Rows and Columns		List of all contacts who have not provided any consent for any business purpose.
List of Emails Opted In	Email Address	Rows and Columns		List of all emails currently opted in.
List of Emails Opted Out	Email Address	Rows and Columns		List of all emails currently opted out.
List of Leads with no Consent	Leads	Rows and Columns		List of all leads who have not provided any consent for any business purpose.
List of Open Data Privacy Activities	Data Privacy	Rows and Columns		A list of all data privacy activity that have a status of open.
List of Open Data Privacy	Data Privacy	Rows and Columns		List of open data privacy

Activities assigned to me				activity assigned to me
Number of Data Privacy Activity created each month by type	Data Privacy	Matrix	Vertical Bar	Number of data privacy activity created each month by activity type
Open Data Privacy Activities by Type	Data Privacy	Summation with details	Horizontal Bar	List of all open data privacy activity grouped by activity type
Recently Created Data Privacy Activity	Data Privacy	Rows and Columns		A list of all recently created data privacy activity. Time period can be adjusted in the report using the run time filters.

Sales and Marketing Reports

The following reports will help sales and marketing professionals manage sales activities and identify key performance indicators (KPIs). The reports in this section are tagged "Stock Report" and "Sales and Marketing" in the Reports module.

Name	Module	Type	Chart Type	Description
Accounts by Assigned to User	Accounts	Summation		Number of accounts for each assigned user. This report helps in making sure that account workload is optimized across the sales team. Use

				run time filters to narrow down by type or industry.
Accounts By Type By Industry	Accounts	Summation	Horizontal Bar	Number of accounts summarized by account type and industry
Accounts Created by User by Month	Accounts	Matrix	Vertical Bar	Number of accounts created by month by assigned user during the current year. Time period can be adjusted in the report using the run time filters.
All Closed Opportunities	Opportunities	Rows and Columns		List of all closed opportunities
All Open Opportunities	Opportunities	Rows and Columns		List of open opportunities
Contacts Created by User by Month	Contacts	Matrix	Vertical Bar	Count of all contacts created this year by each assigned user by month. Time period can be adjusted in the report using the run time filters.
Leads By Lead Source	Leads	Summation	Vertical Bar	Number of leads created by lead source
Leads Converted - Lost by Month	Leads	Matrix	Vertical Bar	Number of leads converted and

				lost each month. Time period can be adjusted in the report using the run time filters.
Leads Converted by User	Leads	Summation		This report provides the number of leads converted by each user in the current quarter. Time period can be adjusted in the run time filter.
Leads Created by Source per Month	Leads	Matrix	Vertical Bar	Leads created each month by source. Time period can be adjusted in the report using the run time filters.
Leads Created by User per Month	Leads	Matrix	Vertical Bar	Leads created each month by user. Time period can be adjusted in the report using the run time filters.
Leads with No Calls, Meetings, Tasks, or Emails	Leads	Summation		Summary count of leads where no activity has taken place or is scheduled. Those leads are counted that have no calls, meetings or tasks

				scheduled or completed.
My Customers by Area	Accounts	Rows and Columns		A list of customers in a given area (City or Zip Code). This report only lists accounts that are assigned to the person viewing the report. You can use this report to create a trip plan.
My New Customer Accounts	Accounts	Rows and Columns		List of new customers recently opened and assigned to me.
My Open Leads	Leads	Rows and Columns		List of all leads assigned to me.
My Open Opportunities	Opportunities	Rows and Columns		List of Opportunities assigned to me that are still open and are expected to close this month. Time period can be adjusted in the report using the run time filters.
My Open Tasks by Priority and Status	Tasks	Matrix	Horizontal Bar	My open tasks grouped by priority and status. This report allows one to focus on higher priority tasks that are

				near completion.
My Pipeline Funnel (Revenue Line Items)	Revenue Line Items	Summation	Funnel	This report shows a funnel chart of the revenue line item pipeline that are assigned to me. Use the run time filters to include only forecasted revenue line items.
Number of Leads Created by Week	Leads	Summation	Vertical Bar	Number of leads created for each week this year. Time period can be adjusted in the report using the run time filters.
Number of Open Tasks by Users by Week	Tasks	Matrix		Number of open tasks by each user by week due.
Number of Opportunities Created by Team by Month	Opportunities	Matrix	Vertical Bar	Summary of the number of all opportunities created this year grouped by primary team assigned. This gives a sense of which teams are generating the opportunities. Time period can also be adjusted in the

				run time filters.
Number of Opportunities created by User by Month	Opportunities	Matrix	Vertical Bar	Summary of the number of all opportunities created this year by each user. This gives a sense of which sales persons are generating the opportunities. Time period can also be adjusted in the run time filters.
Number of Quotes created by Users by Month	Quotes	Matrix	Vertical Bar	Number of quotes created by each user by month. Time period can be adjusted in the report using the run time filter.
Open Call List	Calls	Rows and Columns		
Open Leads by User	Leads	Summation	Horizontal Bar	List of open leads grouped by assigned user.
Open Meetings	Meetings	Rows and Columns		List of Open Meetings
Open Opportunities and Number of Calls	Opportunities	Summation		A list of all open opportunities and the number of calls currently scheduled for each. Use the run time filters to select only

				scheduled or held meetings. Select the opportunity status to filter on opportunities that are closed won or lost.
Open Opportunities and Number of Meetings	Opportunities	Summation		A list of all open opportunities and the number of meetings currently scheduled for each. Use the run time filters to select only scheduled or held meetings. Select the opportunity status to filter on opportunities that are closed won or lost.
Open Opportunities by Expected Close Month	Opportunities	Summation	Vertical Bar	Summary of all open opportunities by expected close month. Details of the opportunities are also listed in this report.
Open Opportunities by Type by Expected Closed Month	Opportunities	Matrix	Vertical Bar	Summary of opportunities by expected close month grouped by type.

Open Opportunities by User by Expected Close Month	Opportunities	Matrix	Vertical Bar	Summary of opportunities for each user by expected close month.
Open Quotes by Stage	Quotes	Summation	Pie	A list of all open quotes summarized by stage.
Open Quotes by Stage by Close Month	Quotes	Matrix	Vertical Bar	Summary of quoted amounts that are open by their expected close month and grouped by stage. This report indicates which quotes to prioritize and close.
Open Quotes by Stage by User	Quotes	Matrix		Summary of quoted amounts that are open for each assigned user grouped by stage. This report gives a sense of where the quotes are in terms of stages for each sales person.
Open Quotes Expiring This Month	Quotes	Rows and Columns		A list of quotes that are expiring this month. Time period can be adjusted in the report using the run time filter.

Open Tasks	Tasks	Rows and Columns		List of Open Tasks
Opportunities Created by Lead Source by Month	Opportunities	Matrix	Vertical Bar	Monthly summary of all opportunities created this year grouped by lead source. This report gives a sense of which source are generating most opportunities. You can also toggle between open or closed won opportunities. Use the run time filter to change time period.
Opportunities with No Calls, Meetings, Tasks, or Emails	Opportunities	Summation	Horizontal Bar	Summary count of opportunities where no activity has taken place or is scheduled. Those opportunities are counted that have no calls, meetings or tasks scheduled or completed.
Pipeline By Team By User	Opportunities	Summation	Horizontal Bar	Summary count of opportunities where no activity has taken place or is scheduled.

				Those opportunities are counted that have no calls, meetings or tasks scheduled or completed.
Pipeline By Type By Team	Opportunities	Summation	Horizontal Bar	Summarizes the open pipeline by team.
Pipeline by User (Revenue Line Items)	Revenue Line Items	Matrix	Horizontal Bar	Summary of RLI's for each user broken down by their current stage. Use the run time filters to include only forecasted revenue line items.
Pipeline Funnel (Revenue Line Items)	Revenue Line Items	Summation	Funnel	This report shows a funnel chart of the revenue line item pipeline. Use the run time filters to include only forecasted revenue line items.
Quotes Created by Users by Month	Quotes	Matrix	Vertical Bar	Total quote amount created by each user by month. Time period can be adjusted in the report using the run time filter.
Quotes Won	Quotes	Matrix	Vertical Bar	Quoted

Lost by Month				amounts won and lost each month this year. Time period can be adjusted in the report using the run time filter.
Quotes Won Lost by User	Quotes	Matrix		Quoted amounts won and lost this quarter by each assigned user. Time period can be adjusted in the report using the run time filter.
Recently Closed Quotes	Quotes	Rows and Columns		A list of all recently closed quotes.
Revenue Line Items by Product	Revenue Line Items	Summation		Summary of all RLI's by product. Use the run time filters to include only forecasted revenue line items. You can also change the time period and the sales stage of the revenue line item.
Revenue Line Items Sold by Type this Quarter	Revenue Line Items	Matrix	Vertical Bar	This report provides a summary of all closed won sales for each quarter this

				year grouped by the lead source. This provides an indication of which sources of leads are generating sales. Time period can be adjusted on the report using the run time filter.
Sales per Quarter by Lead Source	Opportunities	Matrix	Vertical Bar	This report provides a summary of all closed won sales for each quarter this year grouped by the lead source. This provides an indication of which sources of leads are generating sales. Time period can be adjusted on the report using the run time filter.
Tasks Completed by Users by Week this Quarter	Tasks	Matrix		Number of tasks completed by each user by week in this quarter. Time period can be adjusted in the report using the run time filter.

Tasks Due This week	Tasks	Rows and Columns		List of tasks due this week. Time period can be adjusted in the report using the run time filter.
Top Grossing Products This Year	Revenue Line Items	Summation	Horizontal Bar	Monthly sales of products this year. Time period can be adjusted in the report using the run time filters.
Top Sales Reps This Quarter	Opportunities	Summation		This report summarizes total sales by each assigned user for the current quarter. Time period can be adjusted in the report using the run time filters.
Total Sales by Quarter	Opportunities	Matrix	Vertical Bar	This report provides a chart of total sales broken down by type for each quarter of this year. Time period can be adjusted in the report using the run time filters.
Total Sales by Quarter by User	Opportunities	Matrix	Vertical Bar	This report summarizes total sales by each assigned

				user for each quarter of this year. This report can be used to compare sales person performance. Time period can be adjusted in the report using the run time filters.
Upcoming Calls Scheduled by Account	Calls	Summation with details		Number of calls scheduled by account in the coming weeks.
Upcoming Meetings Scheduled by Account	Meetings	Summation with details		Number of meetings scheduled by account in the coming weeks.
Weekly Calls Held This Quarter by User	Calls	Matrix	Vertical Bar	Number of calls held by each user by week in this quarter. Time period can be adjusted in the report using the run time filter.
Weekly Calls Scheduled This Quarter by User	Calls	Matrix	Vertical Bar	Number of calls scheduled by each user by week in this quarter. Time period can be adjusted in the report using the run time filter.
Weekly	Meetings	Matrix	Vertical Bar	Number of

Meetings Held This Quarter by User				meetings held by each user by week in this quarter. Time period can be adjusted in the report using the run time filter.
Weekly Meetings Scheduled This Quarter by User	Meetings	Matrix		Number of meetings scheduled by each user by week.
Wins and Losses by Users this Quarter	Opportunities	Matrix		The total amount of opportunities won vs lost by each assigned user in the current quarter. Time period can be adjusted in the run time filters.

Restoring Deleted Stock Reports

If a user deletes a stock report, it is marked with a deleted flag in the instance's database. Should you need to recover the deleted report, a person with access to your instance's file system can locate the report in the saved_reports table and change the Deleted field from "1" to "0" for this specific report record. Upon doing so, the report will be restored in your Sugar instance. If the stock report has been deleted from the database and cannot be recovered, you must manually recreate the report from scratch in the Reports module.

To hide one or more stock reports from your users, consider mass updating the team to the Administrator's private team because deleted reports cannot be restored via the user interface.

Note: Customers with instances hosted on Sugar's cloud service do not have direct access to the database and, therefore, cannot restore stock reports once they have been deleted. A support-authorized contact for your organization can file a case

with the Sugar Support team for assistance in trying to restore the report that has been deleted from your Sugar instance.

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Processes

Overview

Sugar's Processes module is the user-facing portal to [SugarBPM™](#), Sugar's business process management tool that allows administrators to streamline everyday business processes by managing approvals, sales processes, call triaging, and more. A business process is a set of logically related tasks that are performed in order to achieve an organizational goal. It presents all of the tasks that must be completed in a simplified and streamlined format.

SugarBPM empowers Sugar administrators to automate vital business processes for their organization. Some examples of business processes that can be automated using SugarBPM include invoice approvals, lead routing, customer service case routing, and automated reminders and escalations. This documentation will cover how to use the Processes module, as well as the various actions and options available from within the module. For more information on how administrators can create and configure processes, please refer to the [SugarBPM](#) documentation in the Administration Guide.

Note: SugarBPM™ is not available in Sugar Professional.

Process Fields

The Processes module contains the following fields. Please note that administrators and users with developer-level role access cannot alter, add, or remove fields via Studio as they typically can with other Sugar modules.

Field	Description
Assigned To	The user assigned to the record that requires approval or routing
Date Modified	The date and time that the process definition's Activity element was initiated

Date Created	The date and time that the process definition's Activity element was initiated
Process Number	A unique, auto-increment number that is used to identify this process

Note: Process numbers are generated in sequential order as new processes are triggered. |
Process Definition Name	The name of the process definition record that generated this process; For more information about Process Definitions, please refer to the [Process Definitions](#) documentation in the Administration Guide.
Process Name	The name given to the process definition's Activity element by the process owner
Process User	The user responsible for executing this process' Activity element
Process Owner	The user assigned to the process definition record that generated this process
Record Name	The name or title of the record that requires approval or routing

Working With Processes

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

Content Link	Description
[Searching for Processes](#) [List View Search](#) [Creating a Filter](#) [Saving a Filter](#)	The Searching for Records section provides an introduction to list view search, which searches and filters within the Processes module.
[Processes List View](#) [Total Record Count](#)	The List View section walks through the many elements of the Processes List

List View Search Column Reordering Column Resizing Column Sorting Column Selection More Processes Dashboards	View layout, which contains a list of all running processes that require action (e.g. approve, reject, etc.) from the logged-in user. Unlike other Sidecar modules, you will only see processes in the list view if there is anything requiring your approval or review. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Processes list view are described in the List View Record Actions Menu section of this page.
Processes Record View Favorite Designation Following Designation Next or Previous Record Actions Menu Show More Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Activity Stream Dashboards	The Process record view displays the Sugar record that is awaiting action in full detail including its module name, fields, activity stream, and subpanels of related records. For information about navigating these elements of a record, please refer to the User Interface links on the left or the relevant module page in the Application Guide. To access the Process record view, click on a process name on the Processes dashlet or select "Show Process" from the process record's list view Actions menu. There are several process-specific elements added to the standard record view, which are explained in the Approval Process Actions Menu, Routed Process Actions Menu, and Self-Service Actions Menu sections of this page. **Note**: Processes may affect Sidecar module records as well as legacy user-interface modules. For information on navigating the legacy user interface, please refer to the User Interface (Legacy) documentation.

Process Menus

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

Module Tab Menu

The Processes module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs at the top of any Sugar screen. The additional modules will appear on the list and you can click "Processes" to access the list view.

From the Processes list view, click the triangle in the Processes tab to display the Actions menu. The module tab's Actions menu has one option, View Processes, which is another way to navigate to the Processes list view.

Administrators and users with developer-level role access may see additional options such as a link to the Process Management screen. For more information about options available to administrators and developers, please refer to the

[SugarBPM](#) documentation in the Administration Guide.

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

- The Processes module may be marked as hidden in your user preferences, which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Processes module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the [Layout Options](#) section of the Getting Started documentation.
- The administrator may have disabled the Processes module for your entire Sugar instance. Reach out to your Sugar administrator to have the Processes module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration Guide.

List View Record Actions Menu

The Record Actions menu to the right of each record's Preview button allows users to execute a running process directly from the list view by clicking "Show Process". This will direct the user to a landing page where they will be instructed to approve, reject, or resume (route) the current process. For more information about executing processes, please see the [Executing Processes](#) section of this page.

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

Menu Item	Description
[Preview](#) (Eye icon)	Preview the progression of this process in the intelligence pane
[Show Process](#)	Navigate to the process' landing page to approve, reject, or resume (route) this

	process

Record View Actions Menu

The Process [record view](#) displays the Sugar record that is awaiting action in full detail including its module name, fields, process buttons, and subpanels of related records. To access a process' record view, click on the process name in the [Processes dashlet](#) or select "[Show Process](#)" from the process record's [list view Actions menu](#).

The process' Actions menu appears on the top right of the page and allows you to perform operations on the current record specific to its process type. To learn more about the three available Actions menus ([approval](#), [routed](#), and [self-service](#)), please refer to the corresponding Actions menu section under the [Executing Processes](#) section below.

In addition to a Processes-specific Actions menu, there are several process-specific elements added to the record view above the record's name and module icon.

From left to right across the top of the record view, the process record view displays the following information:

Menu Item	Description
Process Definition Name	The name of the process definition record that generated this process; For more information about Process Definitions, please refer the [Process Definitions](#) documentation in the Administration Guide.
Process Name	The name that was given to the process definition's Activity element by the process owner
Process Due Date	The date and time by which you should execute this process step

	Note: If the administrator has not specified a due date, then no date will appear. If the due date occurs in the past, then the date will be preceded by the word "Overdue" in red text.

Viewing Processes

The Processes module is the only SugarBPM module that is visible to regular users. From the [Processes module list view](#), you can view running processes if there is anything for you to approve or review. You can view those same processes via the [Processes dashlet](#) in addition to any self-service processes waiting to be claimed in the Self Service Processes tab.

Viewing Via Dashlet

All users who may be engaged in a process should place the Processes dashlet on their home screens. Process users will not receive an email notification when an activity is ready for them (unless the administrator has explicitly configured this within the process definition). The dashlet makes it easy for users to know when it is their turn to participate in a process and to take the appropriate action.

Note: Users (including administrators) will see only the processes that immediately require their attention in the Processes dashlet.

To add the Processes dashlet, please refer to the [Adding Dashlets](#) section of the Intelligence Pane documentation, choosing "Processes" from the Add a Dashlet page.

Processes	The Processes dashlet displays due now, upc…	👁

After saving the dashlet and its containing dashboard, the dashlet will offer several Processes-specific filtering tools:

- **Current** : Click on this button to view processes that are running within the expected timeframe.
- **Overdue** : Click on this button to view processes that have a due date in the past. The label "Overdue" and the due date will be displayed adjacent to the Process description.
- **My Processes** : Enable this tab to view only the running processes upon which the logged-in user must act. To execute the Process, click on the name of the process. Please note that admin users can not see processes running for other users via the dashlet. To access the system's exhaustive list of running and completed processes, please refer to the Process Management section of the Administration Guide.
- **Self Service Processes** : Enable this tab to view only the running processes in the queue to be claimed by a user. Self-Service processes are configured inside the User Activity element settings of the related process definition.
- **Process Description** : Running processes are displayed in list view format with descriptive fields including the unique process number, the name of the affected Sugar record, the process title, the responsible user's name, and the label of the relevant process step.
- **Due Date** : When a due date exists it will appear adjacent to the process description.

To execute a process from the Processes dashlet, please refer to the Executing Processes section of this page.

Viewing Via List View

The Processes list view displays all running processes that require the logged-in user to take action (e.g. approve, reject, etc.) and that meet the current search criteria. Users will not see processes for any other user – even if the other user is a direct report or a member of the same team. To access the list view, simply click

the Processes module tab. To view or execute one of the process activities from the list view, select "Show Process" from the record's [list view Actions menu](#).

Executing Processes

When a running process requires action from a user, that user will see the process in their Processes dashlet and Processes module list view. At these moments within a flow, a user needs to decide if a circumstance is approved or rejected or review and/or edit a Sugar record. This decision is formally indicated by executing the process. The following sections explain how to execute the different process activities in Sugar.

Approval Processes

An approval process is a moment within a flow where a user must decide if a circumstance is approved or rejected. When an approval process requires action from a user, that user will see the process in their Processes dashlet and Processes module list view. The user will formally indicate their approval by executing the process.

As an example, an organization may require a different manager's approval depending on the discount total. The following image portrays how a Sugar process could automate this approval:

All of the steps in the above process are automated except for two approval steps:

"Needs Jim Approval" and "Needs Chris Approval". When the automated process reaches either of these steps, Jim or Chris will see a line item in his Processes dashlet and list view. The following two sections explain what a running approval process looks like and how to execute the approval.

Approval Process Actions Menu

When a process requires an approve or reject response, the process' record view will display the record that is pending approval.

Below the process details are the process' approval buttons and process Actions menu, which allow you to perform the following operations:

Menu Item	Description
Approve	Allow the process to continue to the next step along the approval path
Reject	Allow the process to continue to the next step along the rejection path
Edit	Edit the fields on the record to be approved
History	Display the entire time-stamped history of all transitions, user engagements, and automated occurrences for this process
Status	Display an image of this process' overall flow including the approval and rejection paths for this approval step
Add Notes	Add notes for people who will engage with the process later and/or read notes left by other users before you
Change Assigned To User	Choose a new Assigned To user for the Sugar record

	Note: This option must be enabled by the administrator.
[Select New Process User](#)	Choose a new user to execute this process Note: This option must be enabled by the administrator.

Executing an Approval Process

Follow the steps below to execute an approval process:

1. Click on the hyperlinked process name in your Processes dashlet. Please note that the dashlet will not differentiate between Approval processes and Routed processes. The process type will become apparent on the next screen.

Alternatively, navigate to Processes list view and choose "Show Process" from the Actions menu of the record:

2. The process landing page is the record view of the affected Sugar record. Expand the record's Actions menu to browse the available process options. For an overview of Processes-specific features and options that are available here, please refer to the [Approval Process Actions Menu](#) section of this page. You can review the user notes and history or, if enabled, choose to delegate this process step to another user.

3. If desired or required by the process, edit any fields on the Sugar record by clicking the Edit button.
4. Finally, click on either "Approve" or "Reject" to execute the process and return to your dashboard, where the executed process will no longer appear in the Processes dashlet.

Routed Processes

The other user activity that a process may require is to simply review and/or edit a Sugar record. For example, a high-value quote record may not require approval, but the executive team should be able to review the quote for capacity-planning purposes. In this situation, the process definition can be configured to route the process flow through the members of the executive team without requiring a conditional response. The following image portrays how a Sugar process will automate this procedure:

Routed Process Actions Menu

When a process routes a record to a user to review and/or edit, the process' record view will display the record that is pending review.

Below the process details are the process' Route button and Actions menu, which allow you to perform the following operations:

Menu Item	Description
Route	Allow the process to continue to the next step
Edit	Edit the fields on the record to be approved
History	Opens a popup window that displays the entire time-stamped history of all transitions, user engagements, and automated occurrences for this process
Status	Opens a popup window that displays an image of this process' overall flow including the approval and rejection paths for this approval step
Add Notes	Opens a popup window where you can add notes for people who will engage with the process later or read notes left by other users before you
Change Assigned To User	Choose a new Assigned To user for the Sugar record **Note**: This option must be enabled by the administrator.
Select New Process User	Choose a new user to execute this process **Note**: This option must be enabled by the administrator.

Executing a Routed Process

Follow these steps to execute a process that has been routed to you:

1. Click on the hyperlinked process name in your Processes dashlet. Please note that the dashlet will not differentiate between Approval processes and Routed processes. The process type will become apparent on the next screen.

Process # 20 - A.D. Importing Big Deal
Unassigned **Executive Review**
High-Value Opportunity

Alternatively, navigate to Processes list view and choose "Show Process" from the Actions menu of the record:

2. The process landing page is the record view of the routed Sugar record. Expand the record's Actions menu to browse the available process options. For an overview of process-specific features and options that are available here, please refer to the [Approval Process Actions Menu](#) section of this page.
3. When a flow has been routed to you for review, the only required action is to acknowledge receipt. However, you may first choose to edit the affected record. Review the details of the Sugar record and inspect the process notes for any critical information that your colleagues may have shared. For information about viewing process Notes, please refer to the [Viewing Process Notes](#) section of this page.
4. When you have completed making edits and reviewing the record, click "Route" to complete the process. This will redirect you to your dashboard, where the executed process will no longer be visible in your Processes dashlet.

Self-Service Processes

Some user-facing processes will not have a designated process owner. Instead, users will be empowered to claim responsibility for them. These processes will appear in the Self Service Processes tab of the Processes dashlet. Self-service processes may require either an approval/rejection response or review of a routed action.

Self-Service Process Actions Menu

Self-service processes may require either an approval/rejection response or review of a routed record, but first, a user must claim the process. When a user claims a self-service process, the process' record view will display the record that is waiting

to be claimed.

Below the process details are the process' Claim button and Actions menu, which allow you to perform the following operations:

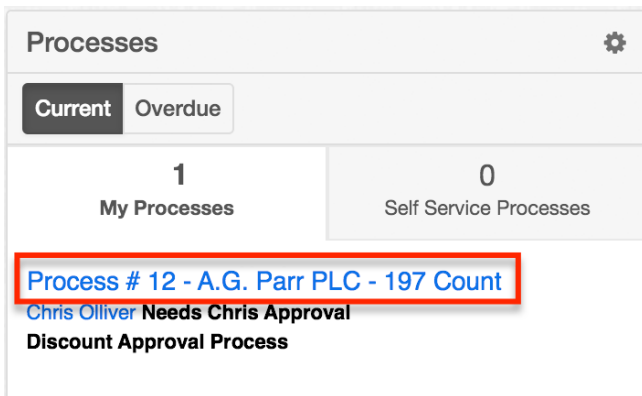| Menu Item	Description
Claim	Volunteer to execute this process and remove it from view of other team members. The process can be immediately executed after claiming it, or you can navigate away and find the process later in the My Processes tab of your Processes dashlet.
Cancel	Navigate back to the home page without claiming this process
History	Opens a popup window that displays the entire time-stamped history of all transitions, user engagements, and automated occurrences for this process
Status	Opens a popup window that displays an image of this process' overall flow including the approval and rejection paths for this approval step

Claiming a Self-Service Process

Follow these steps to claim and then execute a self-service process:

1. Click on the hyperlinked process name in the Self Service Processes tab of your Processes dashlet.

Alternatively, navigate to Processes list view and choose "Show Process" from the Actions menu of the record:
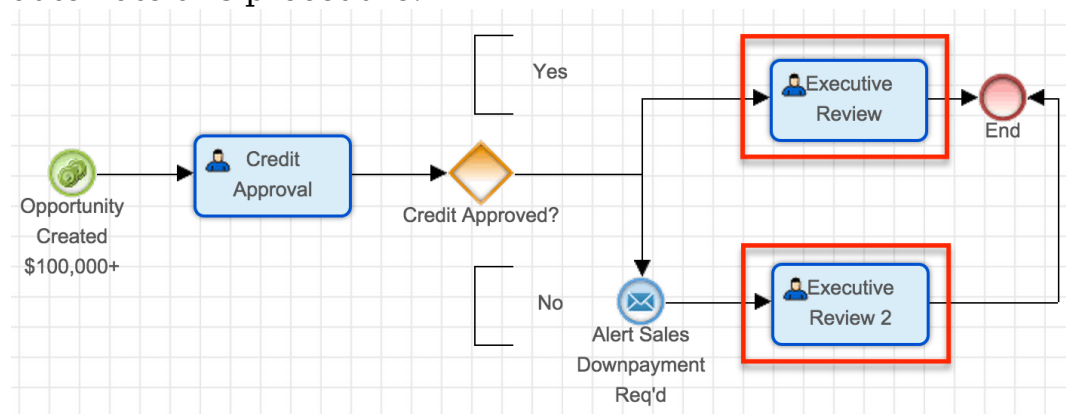

2. The process landing page is the record view of the affected Sugar record. Expand the record's Actions menu to browse the available process options. For an overview of process-specific features and options that are available here, please refer to the Self-Service Process Actions Menu section of this page.

3. Click on "Claim" to indicate your intention to execute this process and remove it from the view of other team members. After clicking the Claim button, the page will reload and expose the Approve/Reject or Route buttons, depending on what type of process activity has been configured. The process can be immediately executed after claiming it, or you can navigate away and find the process later in the My Processes tab of your Processes dashlet.

4. Execute the process as explained in either the Executing Approval Processes or Executing Routed Processes sections of this page.

Choosing a New Process User

When a process is routed to you for review or approval, it may be possible to designate a new user to execute the process. The administrator can enable or disable this option on each process definition, so it may be possible to do this for one process but not another. If the option is enabled, "Select New Process User" will be available in the Actions menu on the process record view:

Follow these steps to reassign a process:

1. Click on the hyperlinked process name in your Processes dashlet. Please note that the dashlet will not differentiate between Approval processes and Routed processes. The process type will become apparent on the next screen.

Alternatively, navigate to Processes list view and choose "Show Process" from the Actions menu of the record:

2. The process landing page is the record view of the affected Sugar record. **Note**: Legacy user-interface modules will display the record's edit view.
3. Click on the triangle next to the Edit button to reveal the Actions menu. Click on "Select New Process User".

Note: If "Select New Process User" is not displayed, then the administrator has not enabled reassignments for this type of process. Please contact the administrator and ask them to reassign the process for you.

4. The "Select New Process User" window will appear.

There are three options:

- **User** : Choose a user to complete this step of the process. The administrator will have specified one Sugar team from which you may choose any member.
- **Type** : Choose a reassignment method:
  - **Round Trip** : Choose "Round Trip" to make the process route back to you when the new user has completed this step.
  - **One Way** : Choose "One-Way" to direct the process to a new user, and then have it continue to its next step without routing back to you.
- **Note** : As a best practice, add a note explaining why you are choosing a new user to execute this process. The new user will see your note when she clicks on "View Notes".

5. Click on "Save" to be redirected to your dashboard where the reassigned process will no longer be visible on your Processes dashlet.

Choosing a New Assigned To User

When a process is routed to you for review or approval, it may be possible to choose a new assigned user for the affected Sugar record without affecting the flow of the process. The administrator can enable or disable this option for each process definition, so it may be possible to reassign the Sugar record for one process but not another. If the option is enabled, "Change Assigned To User" will be available in the Actions menu on the process record view:

Follow these steps to designate a new assigned user:

1. Click on the hyperlinked process name in your Processes dashlet. Please note that the dashlet will not differentiate between Approval processes and Routed processes. The process type will become apparent on the next screen.

Alternatively, navigate to Processes list view and choose "Show Process" from the Actions menu of the record:

2. The process landing page is the record view of the affected Sugar record. **Note**: Legacy user-interface modules will display the record's edit view.
3. Click on the triangle next to the Edit button to reveal the Actions menu. Click on "Change Assigned To User".

Note: If "Change Assigned To User" is not displayed, then the administrator has not enabled reassignments for this type of process. Please contact the administrator and ask them to reassign it for you.

4. The "Change Assigned To User" window will appear:

There are two options:

- **User** : The user chosen here will become the "Assigned To" user of the related Sugar record. The administrator will have specified a Sugar team from which you may choose any member. No other users will be displayed in the User dropdown.
- **Note** : As a best practice, insert an explanation of why you are choosing a new assigned user. The next process user will see your note when he or she clicks on "View Notes".

5. Click on "Save" to update the Sugar record. The page will reload to reflect the change. You can now execute the process as explained in either the [Executing Approval Processes](#) or [Executing Routed Processes](#) sections of this page.
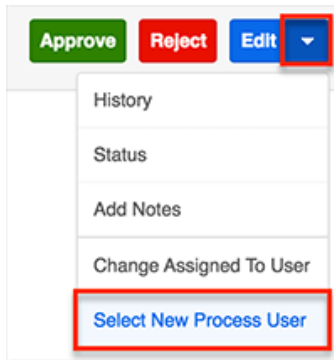
Viewing Details About a Running Process

When executing a running process, there are three options available that will help you gain valuable insight into the past, present, and future state of the process: History, Show Notes, Show Status. These options are accessible via the Actions menu on the process record view. Click on the triangle to the right of the edit button to expand the Actions menu:

In [legacy user-interface](#) modules, these options are represented by icons in the upper right area of the process record view:

The three icons on a legacy record view represent the following actions:

Action	Icon	Description
Show History		View the entire time-stamped history of all process transitions, user engagements, and automated occurrences that were executed by the SugarBPM engine.
Show Notes		Read messages from users who have already engaged in the process and send messages to users who will engage in the process later.
Show Status		Reveal an image of the process' visual design layout in a pop-up window. The image will reveal key information regarding the stages that have already been completed, the current stage of the process, and the stages that have yet to execute.

Viewing Process History

All process records retain a timeline of events that have occurred throughout the process. This timeline can be displayed in a popup window by the process user or by a SugarBPM administrator.

To review the entire time-stamped history of all transitions, user engagements, and automated occurrences for a particular process, follow these steps:

1. From the Processes dashlet, click on the hyperlinked process name to view the process record view.
2. Click on the triangle next to the Edit button to reveal the Actions menu, and then click "History". In legacy user-interface modules, click on the History icon in the corner of the screen. A popup window will appear over the current page outlining the transition history of the current process. Each process History entry will include the following components:
   - The profile image and name of the process user who executed the transition
     Note: Automated events will be executed by the SugarBPM (AW) engine.

   - Explanation of the transition that occurred:

   - Transition status indicator (checkmark):

- Checkmark ☑ : The action has been executed.
- No Checkmark : The action has not yet been executed.

3. Click on the X in the corner of the window to return to the process record view.

Viewing Process Notes

A process user who is engaged in a process activity can add notes for people who will engage with the process later in its flow. When a different user engages in that same process later, he can see the earlier user notes and choose to add his own. Users who executed process activities at the beginning will not see the notes added by subsequent process users unless the process is routed back to them for review or approval later.

Note: Admin users can see all notes and add notes to any running process at any time from the Process Management page.

To create a note and view process notes from other users, follow these steps:

1. From the Processes dashlet, click on the hyperlinked process name to view the process record view.
2. Click on the triangle next to the Edit button to reveal the Actions menu, and then click "Show Notes".
   Note: In legacy user-interface modules, click on the Notes 🖻 icon in the corner of the screen.
3. A popup window will appear over the current page that displays time-stamped notes from earlier users of the current process.
4. At the top of the window, there is also a composition area where you can add more notes. Simply type a message in the empty field and then click on "Add Note" to add it to the Notes window.

5. Click on the X in the corner of the window to return to the process' record view.

Every person that may be involved in a process will not see the process throughout its entire flow. Regular users can only see the process in list view when they have a record to approve, reject, or review. Therefore, only one regular user (non-admin) can see the notes at any given time. In other words, the notes will only be seen by users who approve/reject/review the process after the note is added.

Previewing the Process Design

Users can view the progression of a process within the overall flow directly from the process' record view. Click on the triangle next to the Edit button to reveal the Actions menu, and then click "Show Process".

Note: In legacy user-interface modules, click the Status 🔯 icon in the upper right corner.

The process' visual design layout will open in a pop-up window, providing key information regarding the stages that have already been completed, the current stage of the process, and the stages that have yet to execute. The executed and in-progress stages of the process will be displayed in color, while bypassed or not-yet-executed stages will be presented in a grayed-out style.

Visual Element	Example	Description
Colorized shapes	📋	This element has been executed or is in progress

Gray shapes		This element has been bypassed or occurs in the future
Green-outlined activity	Needs Jim Approval	The activity is waiting for you (the viewing user) to respond
Red-outlined activity	Activity # 1	The activity is waiting for a user to respond, but not the viewing user
Red glowing shape		This element is in progress
Shape containing a small crossed-out circle	Activity # 1	The process was terminated or canceled on this element
Numeric value in parentheses	New Orders (2)	This element was triggered by multiple events concurrently **Note**: This parenthetical notice may indicate that there is a flaw in the design of the process definition. Please review the conditions on the triggering event to eliminate the possibility of overlapping triggers.

Terminated vs. Cancelled Processes

The SugarBPM automatically terminates a process when the record related to the process' Start event is deleted. The associated process will be removed from the Processes dashlet and the process record will display "Terminated" in the Status column of the administrator's Process Management list view.

Cancelled processes, on the other hand, have been intentionally stopped by the administrator. The associated process will be removed from the Processes dashlet and the process record will display "Canceled" in the Status column of the administrator's Process Management list view.

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Export

Overview

There may be times in which users will want to access, review, or manipulate information from their Sugar database in another format outside of Sugar. To facilitate this process, users have two options on ways to export their data from Sugar. Upon exporting data from Sugar, a CSV ("Comma Separated Value") format file will be downloaded to the users computer. This file can be reviewed in Microsoft Excel, Notepad, or other spreadsheet tools and text editors.

Exporting restrictions can be controlled by a System Administrator via Admin > Locale. For more information on the Locale menu, please refer to the [Locale](#) section of the Administration guide. An administrator also has the option to create a Role hindering regular users' access to the export functionality. Please refer to the [Role Management](#) section of the Administration guide for more information on setting roles for users.

Exporting From Module List Views

The first type of export that will be covered is exporting from the module list view. When exporting this way, the downloaded file contains every field from the database within the given module for the specified record or records. This export will not include any information from records which are associated via relationships to this module. Please note that the export method varies slightly between modules using the Sidecar user interface (e.g. Accounts, Contacts, Leads, etc.) and Legacy user interface (e.g. Calls, Meetings, Quotes, etc.).

This export method is most useful when performing a type of data migration, needing an excess of detail, or performing a comprehensive import and update of the data, since this method exports all fields within a module. It is recommended the [Export From Reports](#) functionality be used for any other export use case to isolate the specific information needed.

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

Exporting From Sidecar Module List Views

The following steps cover exporting from the Accounts module as an example:

1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the Module Search to find the Account records you wish to export.
3. Select the desired account records individually by marking the checkbox on the left of each row.
   - **Note**: You can also use the Select All feature in the list view to select the first 1000 records in the result set. If you wish to export more than 1000 records or export a specific group of records on the list view, please use the filter option in module search to perform the exports in smaller batches.

4. Choose "Export" from the Actions menu.

The CSV file will be downloaded to your local machine to a location defined by your browser settings. The file can be read and manipulated as necessary.

Exporting From Legacy Module List Views

The following steps cover exporting from the Calls module as an example:

1. Navigate to the Calls list view by clicking the Calls module tab.
2. Use the Basic or Advanced Search functionality to find the records you wish to export.
3. Select the desired call records individually or by using the checkbox dropdown's options.

4. Choose "Export" from the Actions menu.

The CSV file will be downloaded to your local machine to a location defined by your browser settings. The file can be read and manipulated as necessary.

Exported Files From List View

When data is exported from Sugar, the file that is produced is a CSV, or "Comma Separated Value" file. When viewed in a plain text editor, a CSV file looks like a long string of text with groupings of text separated with quotation marks and commas (e.g. "First Name","Last Name","Title"). The file first lists out all columns that are in the file, and then the corresponding rows follow, also separated by quotation marks and commas (e.g. "Dusty","Connor","IT Developer").

However, most spreadsheet software, such as Microsoft Excel, will read this file and convert the quotation marks and commas into rows and columns. This makes your data much easier to read and turns it into a useful format that can be manipulated and re-purposed as need be.

The records that appear in your spreadsheet are dependent on what type of search, if any, you did prior to your export.

When exporting from list view, the user is left with every part of the module database information, which is often not all readable by the user. This file will only contain information specific to the module where the export was performed. This exported data will be comprised of all stock and custom fields from the module. No data that would normally be found in a subpanel will appear on this export.

Exports from modules with [team-based permissions](#) enabled will contain two additional columns:

- **Selected Teams** : A comma-delimited list of the team names that are selected for extra access
- **Selected Team Set ID** : A unique identifier that references the group of teams contained in the Selected Teams field

Exporting From Reports

In addition to exporting from a list view, users also have the option to export data from a report. Because reports allow you to select the specific fields you would like to see, users can narrow down what they see on the export file and filter the module data however they would like. The advantage to using reports is that users will only be presented with the data that they need, and no excess data. In addition, users can also export data from related modules using reports, which is not possible when [Exporting From Module List Views](#). Finally, because the reports are much more focused and specific, there is a higher threshold of the number of records that can be exported before encountering a timeout or any other such issues.

Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a report with a large amount of data. If you encounter an error when performing this action, we recommend breaking up the report in smaller batches.

For more information on creating your report, please refer to the [Reports](#) documentation.

Use the following steps to complete an export from a report:

1. Select an existing report from the Report module's list view, or create a new one based on the information that you would like to export.
2. Click on the actions menu of the report details and select "Export".

3. The CSV file will be downloaded to your computer to a location defined by your browser settings. The file can then be read and manipulated at will.

When exporting from a report, the data is more well-rounded for a user to review. The user can determine which fields should be included on the export by configuring the report. This means that while reviewing it in a spreadsheet, the information appears exactly as it does in Sugar. This makes for a more positive user experience and a more focused export file. In addition, the user is able to use modules related to the reported-on module. This makes the report more useful in a business sense for individual users.

Exported Files From Reports

When data is exported from Sugar, the file that is produced is a CSV, or "Comma Separated Value" file. When viewed in a plain text editor, a CSV file looks like a long string of text with groupings of text separated with quotation marks and commas (e.g. "First Name","Last Name","Title"). The file first lists out all columns that are in the file, and then the corresponding rows follow, also separated by quotation marks and commas (e.g. "Dusty","Connor","IT Developer").

However, most spreadsheet software, such as Microsoft Excel, will read this file and convert the quotation marks and commas into rows and columns. This makes your data much easier to read and turns it into a useful format that can be manipulated and repurposed as need be.

The information that appears in your spreadsheet is dependent on which filters and display columns you added to your report. Only the information shown in the display columns when you view your final report will be included in your CSV export.

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Import

Overview

For most modules, Sugar allows users to transfer data from an external source (usually a comma-separated-values file) into the database via import. Sugar's import wizard is a quick and easy way to create or update many records at once. The import tool can be used to add a list of new customers or leads to the database, update existing data, migrate from a previous CRM system, or for any process that requires manipulating many records at once.

Your system's Sugar administrator may enable importing for the following modules:

- Accounts
- Bugs
- Business Centers
- Calls
- Cases
- Contacts
- Custom modules (if applicable)
- Meetings
- Notes
- Targets
- Tasks

Users with an administrator or developer role can import records into the following admin-only modules:

- SugarBPM modules:
    - Process Definitions
    - Process Business Rules
    - Process Email Templates

- Products modules:
    - Manufacturers
    - Products
    - Product Catalog
    - Product Category
    - Product Types

- ◦ Tax Rates
- Users
  Note: The Import Users option is not available for instances that use SugarIdentity. Administrators will need to access [SugarIdentity](#) via the Cloud Settings console in order to import users.

When importing through any of the above modules, Sugar presents users with a wizard to help guide users through the process of creating and updating records.

Import Guidelines

Importing is a very important process for both new Sugar users and those who have been using Sugar for years. Depending on your business needs, you may run imports anywhere from multiple times per week to only once or twice per year. Regardless of the import frequency, all users follow the same import guidelines:

- **File Delimitation** : Sugar accepts files that are delimited by a given separator, such as commas or tabs. The most common type of import will be using a CSV (Comma Separate Value) file, but Sugar will accept other file types as long as it recognizes the delimiter.
- **Imposed Limitations** : Sugar, by default, does not impose any type of import limitations. However, System Administrators can impose a limit on the number of rows or records that can be imported at one time. This limitation is found in Admin > System Settings > Advanced > Import - Maximum Number of Rows. Administrators can also limit what modules users are allowed to import into through the use of [Roles](#).
- **Scrub Data Before Import** : It is strongly recommended that all data is reviewed and scrubbed before importing. It is much easier to see if you are importing good data or that you have removed all duplicates before importing than finding them after they are already in Sugar and are already in use by other users. In addition, you want to ensure standardized fields such as dates, phone numbers, etc. adhere to a common format so that the import will run as smooth as possible.
- **Parent Records First** : When importing any records that use a relationship to another module, such as the Account - Contact relationship, it is best to try importing the parent, or higher level, records first. This is demonstrated with a one-to-many relationship between the two modules. In this case, it is best to import accounts first and then contacts, which rely on account records.

Importing New Records

The first type of import that will be covered is importing new records. Whether you

are just starting a migration from another CRM to Sugar or if you are adding a new list of records that you have received, such as a new list of leads or accounts, this process will help to get the data into Sugar without having to manually enter each record. After preparing your import file, follow these steps to import the list into Sugar:

1. Navigate to the module tab for the module that you are importing into and select the import option. This will open the Import Wizard and bring you to the "Upload Import File" screen.

2. If you would like to review the Import File Template, you can download it from this page. This will give you a template of the format Sugar is going to be using to import your data. For more information on the template, please review the Import File Template section of this documentation.
3. Select the import file that you are going to use to import by clicking the Choose File button. When prompted, select the file from your computer and it will appear in this box.

4. Ensure that "Create new records only" is selected.
5. If you have preformed imports before and have previously saved your import settings, you can select your setting at the bottom of the page using the "To use pre-set import settings, select from below" option. If you do not have any saved import settings, this section will not appear. For more information on saving mapping, please review the Saving Field Mappings section of this documentation.

6. Click "Next" to access the "Confirm Import File Properties" screen.
7. This screen will show you the first two rows that Sugar is going to try to import as an example to let you know that your file was read properly by

Sugar.

8. The Import Wizard automatically detects the properties of the file that has been uploaded to ensure the best import possible. If you notice any mistakes or need to set up any advanced configuration, click "View Import File Properties". These changes are specific to the import and do not affect your standard user preferences.

9. If the file was exported from either Salesforce.com or Microsoft Outlook, select the corresponding option under "If the import file data was exported from any of the following sources, select which one". If not, leave this as "None". This option will set up your mapping properly on the next screen.
10. Click "Next" to access the Confirm Field Mappings screen.
11. Click the View Notes button for any relevant information, specific to this module, to the import that you are performing.

12. This screen presents you with four columns:
    - **Header Row** : This is the column header from your import file. This column will let you reference your file to make sure your column mapping is correct. If your import file does not have a header row, this column will not show.
    - **Module Field** : This column contains a dropdown list of all importable fields for the module. The Import Wizard tries to match the Header Row with the corresponding Sugar field. If the suggested mapping is incorrect, use the dropdown list to change the mapping. Required fields are marked with an asterisk (*).
    - **Row 1** : This column contains the values from the first row of data in your import file. This is another aid to help ensure you have your mapping correct, so that you can see the mapping using real data and not just the headers. If your import file does not have column headers, there will be an additional column for Row 2.
    - **Default Value** : This column is hidden by default, but can be

expanded if needed. When expanded, you have the option to fill in a value that will populate all records where a value for that field does not exist. For example, if you do not have anything populated in the Accounts Industry field, but you know this is a list of Technology companies, you can populate all blank values in the Industry field

13. Click "Add Field" if any data needs to be added to the import that is not on your import file. This can be used if you would like to assign a value to a record when the column is not on your import file. This is used in conjunction with the Default Value column. For example, if you are importing these accounts, but would like to assign them all to another user, John Smith, you would click the Add Field button, select the field from the Module Field column, and populate the desired value in the Default Value column. Now, all records will be assigned to John Smith upon import.

14. Click "Next" to access the Check for Possible Duplicates screen.
15. This menu allows users to check if there are duplicated values on the import to records that already exist in Sugar. This menu will vary depending on what module you are importing into as the fields will be specific to this module. The fields available to the Import Wizard are determined based on the system-defined indexes. This is why you will not see all fields shown on this list, but only a subset of fields from the module. If you would like to cross reference existing Sugar records against what is being imported, simply drag and drop the field name from the right column, "Available Fields", to the left column, "Fields to Check". For more information on duplicate checking, please review the Detecting Duplicates section of this documentation.

16. If the import configuration that you have set up is going to be used again in the future for additional imports, add a name at the button of the page so that it can be referenced later. For more information on saved field mappings, please review the [Saving Field Mappings](#) section of this documentation.

17. When your duplicate checking settings are complete, click "Import Now" to begin the import.
18. After the import completes, you are brought to the "View Import Results" page. Here, you are provided with a summary of the import.

19. The summary will tell you how many records were created, how many were not created due to an error, and how many were found as duplicates.
20. There are three buttons below the Summary:

    ○ **Undo Import** : If there was a mistake in the import that you realized after importing, you can check this button. All records that were created via the import will be deleted. This button cannot be re-accessed for this import. As soon as you navigate away from this page, the import is considered complete.
    ○ **Import Again** : Click this button if you would like to go back to the first step of the Import Wizard and perform additional imports. Clicking this button will consider the import to be complete.
    ○ **Exit** : This button will also consider the import to be complete, but will bring you back to the module's list view to be able to further review or search your records.
21. There are also three tabs on the summary page under the action buttons:
    ○ **Created Records** : This tab will show you a list view of all of the records that were properly imported on this import.
    ○ **Duplicates** : This tab will present you with any records that were not imported due to the Import Wizard finding duplicates from Step

15. There is an option to download a list of the duplicates, which produces a new CSV file. You have the option to download this list, make any changes, and import again following this same process.

Created Records	**Duplicates**	Errors

Download list of duplicates

- **Errors** : This tab will show you any records that were not imported due to an error during the import process. This is usually seen when there is a problem with data that is on one of the records or rows in the CSV file. For instance, if you are missing a value for a required field, or a field is formatted incorrectly.

Created Records	Duplicates	**Errors**

Here are the rows in the import file that were not imported due to errors.

Download list of errors
Download list of rows that were not imported

Note: Similar to the option to download duplicate records, you also have the option to download the list of errors using the two links provided:

- The "Download list of errors" option will produce a new CSV file with columns showing (from left to right) the error, the field affected, the value, and the line in your original import file where the error occurred.

	A	B	C	D
1	Invalid datetime	Date Modified: (date_modified)	Yesterday	2
2	Required value missing	Name: (name)	NULL	3

- The "Download list of rows that were not imported" option will download a new CSV file with the same format of your original one, containing only the rows that were not imported so that you can clean them up and then re-import.

	A	B	C	D	E	F
1	Name	Billing City	Billing State	Billing Postal	Billing Count	Date_modified
2	SugarCRM	New York	NY	14402	USA	Yesterday
3		Los Angeles	CA	69904	USA	

	Name	Billing City	Billing State	Billing Postal Code	Billing Country	Date_modified
Error: Invalid datetime **Field Name** Date Modified: (date_modified) **Value** Yesterday	SugarCRM	New York	NY	14402	USA	Yesterday
Error: Required value missing **Field Name** Name: (name) **Value** NULL		Los Angeles	CA	69904	USA	

(1 - 2 of 2)

(1 - 2 of 2)

22. Once you have downloaded the desired lists and reviewed the import, the

buttons mentioned in Step 20 can be used to complete your import.

Importing Updates to Existing Records

In addition to importing new records, Sugar's Import Wizard also has the functionality to use an import file to update existing Sugar records. The process runs very similarly to the new record import process described above.

The most important aspect to importing updates to existing records is that Sugar will only update records where there is a matching ID in the import file. Every Sugar record, regardless of what module it is in, is defined with an alphanumeric ID field. This field is typically a 36-character alphanumeric value but may be less if imported from a previous CRM. This field is the only way that the Import Wizard will know which record to update.

Note: All other fields (name, email address, etc.) are not considered unique and can have duplicates, so only the ID field will work to differentiate records for an update from import.

The ID field is not usually shown in Sugar and must be found either by running a report or an export within the module.

During the import, if there are any other records without ID fields and they are in the import file, they will create new records, which will create duplicates in your database.

To import updates, follow the steps below.

1. To prepare the import file, you must have the ID numbers for all of the records that you are going to be updating. The most common methods are either by exporting a list of records from the module list view or by running a report and exporting the results. For more information on exporting, please review the [Export](#) documentation.
   - **Export from List View** : This option will include the record ID field, but it is recommended that you open the file in a spreadsheet editor (Microsoft Excel) and delete any columns that you are not updating. Be sure to leave the ID field and any required fields, such as Name, as the import will not complete without these.
   - **Export from Report** : If you choose to run a report, be sure to include the ID field in your display columns so that the records can be matched up. You will also want to include any required fields, such as Name, as the import will not complete without these. Please note that only Rows and Columns reports can be used for exports. After you have your file ready for import, you can proceed with

working through the Import Wizard.

2. Navigate to the module tab for the module that you are updating and select the import option. This will open the Import Wizard and bring you to the **"Upload Import File"** screen.

3. If you would like to review the Import File Template, you can download it from this page. This will give you a template of the format Sugar is going to be using to import your data. For more information on the template, please review the Import File Template section of this documentation.

4. Select the import file that you are going to use to import by clicking the "Choose File" button. When prompted, select the file from your computer and it will appear in this box.

5. Select the option "Create new records and update existing records".

6. If you have performed imports before and have previously saved your import settings, you can select your setting at the bottom of the page using the "To use pre-set import settings, select from below" option. If you do not have any saved import settings, this section will not appear. If your CSV file was exported from Sugar, this is likely not a necessary step. For more information on saving mapping, please review the Saving Field Mappings section of this documentation.

7. Click "Next" to access the "Confirm Import File Properties" screen. Before the "Confirm Import File Properties" screen opens, you will be prompted with an alert informing you that updates made to existing records cannot be undone. Read, and then click "OK" to proceed.

8. This screen will show you the first two rows that Sugar is going to try to import as an example to let you know that your file was read properly by Sugar.

9. The Import Wizard automatically detects the properties of the file that has

been uploaded to ensure the best import possible. If you notice any mistakes or need to set up any advanced configuration, click "View Import File Properties"**.** These changes are specific to the import and do not affect your standard user preferences.

10. If the file was exported from either Salesforce.com or Microsoft Outlook, select the corresponding option under "If the import file data was exported from any of the following sources, select which one"**.** If not, leave this as "None"**.** This option will set up your mapping properly on the next screen. If this file was exported from Sugar, keep it set to "None"**.**
11. Click "Next" to access theConfirm Field Mappings screen.
12. Click the View Notes button for any relevant information, specific to this module, to the import that you are performing.

13. This screen presents you with four columns:
    - **Header Row** : This is the column header from your import file. This column will let you reference your file to make sure your column mapping is correct. If your import file does not have a header row, this column will not show.
    - **Module Field** : This column contains a dropdown list for each row that contains the name of a field in Sugar. The Import Wizard tries to match the Header Row with the corresponding Sugar field. If the suggested mapping is incorrect, use the dropdown list to change the mapping. Required fields are marked with an asterisk (*).
    - **Row 1** : This column contains the values from the first row of data in your import file. This is another aid to help ensure you have your mapping correct, so that you can see the mapping using real data and not just the headers. If your import file does not have column headers, there will be an additional column for Row 2.
    - **Default Value** : This column is hidden by default, but can be expanded if needed. When expanded, you have the option to fill in a value that will populate all records where a value for that field does

not exist. For example, if you do not have anything populated in the Accounts Industry field, but you know this is a list of Technology companies, you can populate all blank values in the Industry field

Header Row	Module Field	Row 1	‹ Default Value
Name	Name *	Southern Realty	

14. Click "Add Field" if any data needs to be added to the import that is not on your import file. This can be used if you would like to assign a value to a record when the column is not on your import file. This is used in conjunction with the Default Value column. For example, if you are importing these accounts, but would like to assign them all to another user, John Smith, you would click Add Field button, select the field from the Module Field column, and populate the desired value in the Default Value column. Now, all records will be assigned to John Smith upon import.

Header Row	Module Field	Row 1	› Default Value
Name	Name *	Southern Realty	
Billing City	Billing City	Cupertino	
Billing State	Billing State	CA	
Billing Postal Code	Billing Postal Code	72197	
Billing Country	Billing Country	USA	
—	Assigned User Name		Will Westin
Add Field			

15. Click "Next" to access the Check for Possible Duplicates screen.
16. This menu allows users to check if there are duplicated values on the import to records that already exist in Sugar. Duplicate checking will only apply to new records created by the import. For more information on detecting duplicates, please review the **Detecting Duplicates** section of this documentation.
17. If the import configuration that you have set up is going to be used again in the future, add a name at the button of the page so that it can be referenced later. For more information on saving mapping, please review the **Saving Field Mappings** section of this documentation.

To save the import settings, provide a name for the saved settings:

< Back   Import Now

18. Click "Import Now" to begin the import.
19. After the import completes, you are brought to the "View Import Results" page. Here, you are provided with a summary of the import.

20. The summary will tell you how many records were updated, how many were created, how many were not created due to an error, and how many were found as duplicates, as applicable.
21. There are three buttons below the Summary:

   ○ **Undo Import** : If there was a mistake in the import of any new records that you realized after importing, you can check this button. All new records that were created via the import will be deleted. After updating, no changes to updated records can be reverted. This button cannot be re-accessed for this import. As soon as you navigate away from this page, the import is considered complete. This button will not show if there were no new records created.
   ○ **Import Again** : Click this button if you would like to go back to the first step of the Import Wizard and perform additional imports. Clicking this button will consider the import to be complete.
   ○ **Exit** : This button will also consider the import to be complete, but will bring you back to the module's list view to be able to further review or search your records.

22. There are also three tabs on the summary page under the action buttons:

   ○ **Created Records** : This tab will show you a list view of all of the records that were properly imported on this import. If this was only an update, there will not be any records showing on this tab as it does not show updated records.
   ○ **Duplicates** : This tab will present you with any records that were not imported due to the Import Wizard finding duplicates from Step 16. There is an option to download a list of the duplicates, which produces a new CSV file. You have the option to download this list, make any changes, and import again following this same process. If you did not use any duplicate settings, this tab will be empty.

   ○ **Errors** : This tab will show you any records that were not imported due to an error during the import process. This is usually seen when there is a problem with data that is on one of the records or rows in the import file. For instance, if you are missing a value for a required field, or a field is formatted incorrectly.

Note: Similar to the option to download duplicate records, you also have the option to download the list of errors using the two links provided:

- The "Download list of errors" option will produce a new CSV file with columns showing (from left to right) the error, the field affected, the value, and the line in your original import file where the error occurred.

- The "Download list of rows that were not imported" option will download a new CSV file with the same format of your original one, containing only the rows that were not imported so that you can correct the errors and then re-import.

23. Once you have downloaded the desired lists and reviewed the import, the buttons mentioned in Step 21 can be used to complete your import.

Importing Fields With Multiple Values

Multiselect fields allow for the input of multiple values. When importing data to these fields, it is possible to import multiple field values using a comma delimiter within the field.

Importing Multiselect Fields to New Records

To import multiple values to a multiselect field on a new record, the import data file's mapped column should contain exact character matches to existing dropdown values separated by commas. For example, a multiselect field for Flavors contains the options Chocolate, Pistachio, Rocky Road, Spumoni, and Vanilla.

To import a new record that contains both "Vanilla" and "Chocolate" in the Flavors field, the import data file's Flavors column should contain Vanilla,Chocolate with a comma separating the values and no extra spaces. If one of the imported multiselect options is a phrase, such as "Rocky Road", then the imported data field should contain a space character only within that value: Vanilla,Chocolate,Rocky Road.

	A	B	C
1	First Name	Last Name	Flavors
2	Justine	Cambra	Vanilla,Chocolate,Rocky Road
3	Hugo	Bork	Vanilla,Pistachio,Chocolate
4	Jewell	Haas	Vanilla,Pistachio,Spumoni,Chocolate
5	Beulah	Randel	Chocolate
6	Abdul	Ducote	Chocolate

Note: The dropdown option display labels are not required to be unique, so best practice is to import the database values if they are known. For more information about how admin users can see database values and display labels for dropdown options, please refer to the Dropdown Editor documentation.

Importing Multiselect Fields to Existing Records

Importing updates to a multiselect field of a record already existing in Sugar will erase any previous values and replace them with the imported values. If you wish to append new values to the existing values via import, you must first export the contents of the field for each record you will be updating, add the desired values to the existing values in by modifying the exported CSV file, then import the modified export file to Sugar.

For example, imagine you would like to update 100 existing contact records. Each

of the 100 contacts should have "Chocolate" added to the multiselect field "Flavors" without losing the data that is stored in the multiselect field already. The following steps explain how to append a multiselect field via import:

1. Export the list of 100 contacts that need to be updated.
2. Preserve (at least) the Last Name, ID, and Flavors fields in the export file. The other field columns may be deleted.
3. Sort the spreadsheet data by the Flavors column.
4. Remove any rows from the file that already contain "Chocolate" as a value in the Flavors column.

5. If the Flavors column contains any empty cells, type the word Chocolate in those cells. In the remaining cells of the Flavors column, add ,Chocolate (with a leading comma but no extra spaces) to the end of the existing character string.

6. Save this file for import.
7. Follow the steps in the Importing Updates to Existing Records section of this documentation to complete the import and update process.

Importing Relationships

There are many situations where imports need to forge a relationship between two modules. A common example of this would be how importing contacts without an account name would leave the contacts orphaned and not linked to any parent

account. To solve this problem, Sugar allows one-to-many and one-to-one relationships to be imported during the standard import process. The available fields will vary depending on the module being imported and will show on the Import Template.

When importing a relationship, Sugar will need the related record's unique ID, or, in some cases, will accept the record's Name field. Examples of the fields that relate one module to another are explained below. For additional tips and steps to import related records, please refer to the Importing Related Records article.

Module	Module Related To	Field(s) Used For Relationship	Instructions For Import
Accounts	Accounts	Member Of	On the import file, add a column for "Member Of". You can use either the Sugar record ID or the exact name of the parent account. This will cause the imported record to be related to the parent account on the "Member Of" field. Using an account name that Sugar does not recognize will create an additional new account record. **Note**: If you are using the account name, it must be exactly as it shows in Sugar. For example, if your account in Sugar is "SugarCRM", but your import file contains "Sugar CRM" or "SugarCRN", the

			account will not relate properly.
		Parent Account Id	On the import template, there is a column for "Parent Account". Use the existing Sugar record ID of the parent account. The dropdown option for this is Parent Account Id. This will cause the imported record to be related to the parent account on the "Member Of" field.
	Campaigns	Campaign	Use the existing Sugar campaign name or campaign record ID to relate the account to the campaign record. **Note**: If you are using the campaign name, it must be exactly as it shows in Sugar. For example, if your campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the account will not relate properly.
		Campaign ID	Use the existing Sugar campaign record ID number to connect the campaign name

			into the new account record.
Calls	Contacts	Contact ID	Use the existing Sugar contact record ID number to connect the contact name into the new call record.
	Flex Relate	Related To Module Related To ID	On the import template, there are columns for both "Related To Module" and "Related To ID". Both need to be used to form the proper relationship. **Related To Module**: The Sugar module's plural name for the record that you are going to relate (Accounts, Contacts, etc.). **Related To ID**: The ID for the record you are relating.
Cases	Accounts	Account ID	Use the existing Sugar account record ID to relate the case to the account record.
		Account Name	Use the existing Sugar account name or record ID to relate the contact to the account record. **Note**: If you are

			using the account name, it must be exactly as it shows in Sugar. For example, if your account in Sugar is "SugarCRM", but your import file contains "Sugar CRM" or "SugarCRN", the account will not relate properly.
Contacts	Accounts	Account ID	Use the existing Sugar account record ID to relate the contact to the account record.
		Account Name	Use the existing Sugar account name or record ID to relate the contact to the account record. Using an account name that Sugar does not recognize will create a new account record with a relationship to the contact. **Note**: If you are using the account name, it must be exactly as it shows in Sugar. For example, if your account in Sugar is "SugarCRM", but your import file contains "Sugar CRM" or "SugarCRN", the

			account will not relate properly.
	Campaigns	Campaign	Use the existing Sugar campaign name or campaign record ID to relate the contact to the campaign record. **Note**: If you are using the campaign name, it must be exactly as it shows in Sugar. For example, if your campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the contact will not relate properly.
		Campaign ID	Use the existing Sugar campaign record ID number to connect the campaign name into the new contact record.
	Contacts	Reports To	Use the existing Sugar contact record ID number to connect the new contact and the existing one.
	Emails	Email Address Non-Primary Email Address	Importing an existing email address into Sugar's Contacts module will cause all email messages related to that

			email address may match the contact's primary or non-primary email address and must be exact for the relationship to form properly. **Note**: Importing an update to a contact with an existing email address, the Opt-Out and Invalid checkboxes will not be disabled if they are checked on the existing email address.
Meetings	Contacts	Contact ID	
			Use the existing Sugar contact record ID number to connect the contact name into the new meeting record.
	Flex Relate	Related To Module Related To ID	On the import template, there are columns for both "Related To Module" and "Related To ID". Both need to be used to form the proper relationship. **Related To Module**: The Sugar module's plural name for the record that you are going to relate (Accounts, Contacts, etc.).

			Related To ID: The ID for the record you are relating.
Notes	Contacts	Contact ID	Use the existing Sugar contact record ID number to connect the contact name into the new note record.
	Flex Relate	Related To Module Related To ID	On the import template, there are columns for both "Related To Module" and "Related To ID". Both need to be used to form the proper relationship. **Related To**: The Sugar module's plural name for the record that you are going to relate (Accounts, Contacts, etc.). **Related To ID**: The ID for the record you are relating.
Targets	Accounts	Account Name	In Targets, this is just a text field. This will not create any relationships.
	Campaigns	Campaign ID	Use the existing Sugar campaign record ID number to connect the campaign name into the new target record.

	Leads	Lead ID	Use the existing Sugar lead record ID to relate the target to an existing lead record. This is not a relationship that can be forged from either module in Sugar. This relationship is usually formed through the target conversion process. For more information on converting targets, please review the [Lead Conversion](#) documentation.
Tasks	Contacts	Contact ID	
			Use the existing Sugar contact record ID number to connect the contact name into the new Task record.
	Flex Relate	Related To ID Related To Module	On the import template, there are columns for both "Related To ID" and "Related To Module". Both need to be used to form the proper relationship. **Related To ID**: The ID for the record you are relating. **Related To Module**: The Sugar

			module's plural name for the record that you are going to relate (Accounts, Contacts, etc.).

Importing Team-Based Permissions

Modules with [team-based permissions](#) enabled support two additional columns for imports:

- **Selected Teams** : A comma-delimited list of the team names that are selected for extra access
- **Selected Team Set ID** : A unique identifier that references the group of teams contained in the Selected Teams field

When importing a list of new records or record updates, include one of these columns in the import file to set record-level access to the records. If known, the Selected Team Set ID field is the most efficient way to communicate the data to Sugar. In the more common scenario that the ID is unknown, simply insert the name of the selected team (or teams separated by commas) in the Selected Teams field.

Import File Template

The Import File Template is a very useful tool for building your import file from another source or from scratch. The template for any module can be found on the Upload Import File page, which is either the first or second page of the wizard, depending on the module.

The purpose of this file is to let you know what format Sugar is going to be looking for when you perform your import. The file contains all fields for a given module, regardless of if they show on any of your layouts. The file is also properly formatted and all settings are ready for the import. Upon opening the template, you will see a few example lines of either actual records from your instance, or, "demo data" if you have not yet performed an import. The template also contains instructions on how it is used.

It is best to use the format supplied in this template whenever possible to make your import process as seamless as possible.

Saving Field Mappings

When importing data, there can be times where you will be using the same import file format. If this file was not exported from Sugar, that likely means that you have to re-map most of the fields on the Confirm Field Mappings screen of the Import Wizard. To save time in the future, you can use the Import Wizard's pre-set import settings.

On the "Check for Possible Duplicates" page of the wizard, which is the last page before performing your import, there is a text box where you can name the import settings that you have used on this import.

Once you click "Import Now", this mapping will be saved and available for your use in future imports.

This mapping is now saved for your user and will appear on the Upload Import File page of the Import Wizard. This will include two buttons for "Publish" and "Delete".

- **Publish** : Clicking this option will make your mapping available to all users. The Publish button will change to "Un-Publish" so that you can stop other users from using the template mapping. When it is published, it will appear as an option in the same section for other users when they perform an import.
- **Delete** : This button will remove the pre-set import mapping for all users. This action cannot be undone.

Detecting Duplicates

During an Import, Sugar's Import Wizard includes the functionality to check for duplicate records. When enabled, Sugar will check to see if a record already exists in Sugar with the given criteria. When checking for duplicates, Sugar will mark any record as a duplicate if it cross-references against any of the duplicate fields. For example, when importing Contacts, if you select Last Name and Email Address as your duplicate check fields, any record that has a matching last name or a matching email address to an existing contact in Sugar will be marked as a duplicate.

Fields to Check	Available Fields
Last Name	Assigned User ID
Email Address	First Name
	Full Name
	Reports To ID

The duplicate check fields used in each module differ depending on what fields are available to the module. Not all fields are used or available in the duplicate check and are pre-determined based off of system-defined indexes.

If your import file has any duplicate records based off the fields you elect to verify against, the first record will be imported, and then all subsequent records in the file matching the duplicate criteria will be flagged.

Any duplicates will show as such on the final page of the import. You will also have the option to download the duplicates so that they can be manually cross-referenced to verify if they are actually duplicates. If they are not, simply re-run the import process without selecting any fields on the "Check for Possible Duplicates" page.

External Data Sources

When importing data to Sugar, there are other options than importing a data file exported from another source. Sugar offers an option to directly connect to an outside application or service through the Import Wizard and have Sugar pull the information directly from the source. This functionality is currently only available for Google Contacts.

The import process is very similar to what is described above, but with some differences to speed up the process for users who would like to import all contact data into Sugar

Importing Data From Google

1. Navigate to the module tab for the person-type module (e.g. Contacts) that you are importing into and select the import option. This will open the Import Wizard and bring you to the **"Select Data Source"** screen.

2. On the Select Data Source screen, navigate to the "My data is in:" section and choose the option for "an external application or service". This will activate a "Sign In" button for you to sign in to your Google account.

3. Fill in your user name and password for the Google account you would like to connect to and click "Connect".

4. Upon connecting, you will be brought to your user profile, on the "External Accounts" tab. Navigate back to the import screen, repeating steps 1 and 2 above. Click "Next" this time, instead of Sign In.

5. This will direct you to the "Confirm External Source Properties" page, which is very similar to the mapping screen from a data import from a file on your computer. Change any mapping necessary specific to your Google account and your Sugar instance. Any field in the Module Field column

marked with an asterisk (*) is a required field and must be imported.

6. There is no duplicate check for this type of import, but names and email addresses are automatically checked for duplicates.
7. Click "Import Now" after you have completed your mapping.
8. On the "View Import Results" screen, you will see that all of your Google contacts have been successfully imported into Sugar.
9. Any records that were not imported due to error can be exported from Sugar and then re-imported if need be using the "Download list of rows that were not imported" link

10. To review the standard import process to re-import any additional records please review the Importing New Records section of this documentation.

Admin Import Wizard

Administrators have special functionality available in Sugar that may not be available for all other users. One of these is access to the Admin Import Wizard. In the "Admin" menu, under the "System" panel, there is a link for "Import Wizard".

Clicking this option will bring you to the Import Wizard, similar to the one for specific modules. However, the first step here is for "Select Data Source", where you will need to select the module you wish to import data. The dropdown provided includes options for all importable modules in one convenient location. Once you select the module from the list, click "Next" and you will be directed to the standard import wizard where you can import new records or update existing ones.

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Employees

Overview

Sugar's Employees module consists of individual people within your organization. The Employees module allows you to see a list of all employees, their contact information, and their employment status in one convenient location. Employee records are typically created when a user record is created, but users with administrative access can also add non-user employees. This means that, typically, all users will be listed as employees, but not all employees are necessarily Sugar users.

For more information on having administrators create employee records in Sugar, please refer to the [Employee Management](#) documentation in the Administration guide.

For more information on having administrators create user records in Sugar, please refer to the [User Management](#) documentation in the Administration guide.

To access the Employees module, click your profile icon on the upper right of any page in Sugar then select "Employees" in the user menu.

Employee Fields

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

Field	Description
City	The city of the employee's address
Country	The country of the employee's address
Department	The department where this employee works
Email Address	The employee's email address
Employee Status	The employee's employment status in

	the organization, either: Active, Terminated, or Leave of Absence
Fax	The employee's fax number
First Name	The employee's first name
Home Phone	The employee's home phone number
IM Name	The employee's instant message screen name
IM Type	The employee's instant message client type
Last Name	The employee's last name
Mobile	The employee's mobile phone number
Notes	A description or other information about this employee
Office Phone	The employee's office phone number and extension
Other	An additional phone number for the employee
Picture	A picture, headshot, or identifying image of the employee
Primary Address	The number and street of the employee's address
Postal Code	The postal code of the employee's address
Reports to	This field can be related to the Sugar user who is the employee's supervisor
State	The state of the employee's address
Title	The employee's job title

Employees Module Tab

The Employees module tab can be accessed by clicking your profile icon and selecting "Employees" in the user menu. Once in the Employees list view, you can click the triangle in the Employees module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of employees you last viewed in the module.

Viewing Employees

There are various options available for viewing employee records in Sugar including via Employees list view, Employees detail view, and the Employees Recently Viewed menu. Please note that you will only be able to access these views by first clicking on the Employees button after clicking on your user name on the top right side of Sugar.

Viewing Via List View

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

Viewing Via Detail View

The Employees detail view displays thorough employee information by showing all employee fields. The detail view can be reached by clicking an employee record's link from the Employees list view. For more information on viewing employees via detail view, please refer to the [Employees Detail View](#) section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which employees you have recently viewed. Click the triangle in the [Employees module tab](#) to see a list of the 3 records you

most recently viewed in the module. Clicking the record's name (e.g. Will Westin) within the list will open the record in detail view.

Searching Employees

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

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

Basic Search

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

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

- **Search** : Click the Search button or press your Return/Enter key to perform the search.
- **Clear** : Click the Clear button to clear all criteria from the searchable fields.
- **Active Employees** : Select this box to return only records where Employee Status is Active.

Search Employees

| Name | | Active Employees ☐ | Search | Clear | **Advanced Search** |

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "Active Employees" and enter an employee's name, Sugar will only return employee records with a matching name that are active. Once the search is

complete, the relevant results will populate in the [list view](#) below the search panel. To see all employee records, simply click "Clear" and then "Search" to perform a blank search with no filters.

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

Advanced Search

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

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

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

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "Active Employees" and enter an employee's name, Sugar will only return

employee records with a matching name that are active. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all employee records, simply click "Clear" and then "Search" to perform a blank search with no filters.

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

Employees List View

The Employees list view displays all employee records meeting the current search criteria. You can view the basic details of each employee within the field columns.

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

Pagination

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

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

Name		Active Employees ☐	Search	Clear	**Advanced Search**	⑦
					ᐊ ᐊ (1 - 20 of 125) ᐅ ᐅ	

Column Sorting

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

Employees Detail View

The Employees detail view displays thorough employee information by way of all employee fields grouped into one page.

Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Next or Previous Record

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

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Mobile Browser

Sugar can be accessed via browsers on mobile devices (i.e. Android, iOS) as a means of working with your Sugar instance without installing the Sugar mobile app. To access your Sugar instance via browsers in a mobile view, simply enter your instance URL and append "/?mobile=1" to the end of the URL as follows: https://example.sugarondemand.com/?mobile=1. For more information on navigating and utilizing your Sugar instance in a mobile view, please refer to the [Sugar Mobile User Guide](#) for your specific mobile device (i.e. Android, iOS).

Note: Please be aware that some features covered in the Sugar Mobile user guides may be unavailable in the mobile browser view.

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Tags

Overview

Tags are user-created keywords or phrases that can help users find, group, and classify large amounts of data by common attributes that may not already be defined via basic database fields. Sugar stores tags as individual records in the Tags module. Modules (e.g. Accounts, Contacts, etc.) using the Sidecar user interface contain a Tags field where users can create and share tags that can be used to identify records in filters, dashlets, and reports.

Users can easily create tags from any tags-enabled module's (e.g. contact's) record view. Once the tag is created, it may then be related to other Sugar records such as meetings, cases, opportunities, and many others. One Sugar record can have multiple tags. This documentation will cover how users can create new tags and use existing tags by interacting with the system-wide tag repository.

While tags can be created and used by regular Sugar users, some actions in the Tags module are only available to administrators and users with developer-level role access. This documentation will cover the actions available to all users. For information about tag administration options which allow you to manage the system-wide tag repository, please refer to the [Tag Management](#) documentation in the Administration Guide. For instructions concerning views and actions which are common across most Sugar modules, please refer to the [Working With Tags](#)

section of this page.

Unlike other Sugar modules, users can see all tag records regardless of their team membership, but visibility may be affected by user access and assigned roles. For more information on access types and roles, please refer to the Role Management documentation in the Administration guide.

Understanding Tag Behavior

The act of relating a tag to a Sugar record is referred to as "tagging". A user can tag any Sidecar module record in Sugar via the Tags field. Please refer to the User Interface documentation for a list of Sidecar modules. If you do not see the Tags field but expect that you should, reach out to your system administrator to discuss tag visibility and access settings for your user.

Use cases for effective tagging include:

Use Case	Example Tags
Classifying high-value or urgent business	Tags top 20 hot! Platinum Client
Connecting specific events and activities with clients	Tags SugarCon 2015 Visitor tradeshow attendee exhibitor
Assigning role-based attributes	Tags Influencer champion gatekeeper decision maker
Noting interest-based and demographic classifications	Tags urban baby boomer gardening scuba diving

When working with tags in Sugar, keep in mind the following rules of tag behavior:

- Tags may be a single word or a short phrase.
- Differentiate between single-word tags and multi-word phrases by using a comma between tags.
- Inserting a space character will result in a single, multi-word tag.
- Tags are not case-sensitive, but take care to prevent unintentional duplicates due to misspellings or unnecessary punctuation.
- Tags are shared by every user in an instance and across all tags-enabled modules. When you create and save a new tag, all users will immediately be able to use that tag regardless of team restrictions.

Clicking on Tags

Clicking on a tag in Sugar may take you to the tag's record view or to the global search's View All Results page, depending on where you are in the application when you click the tag. If you click on a tag that links to its own record view, the Sugar records related to the tag will be visible, grouped by module, in the tag's related-record subpanels.

Note: Users cannot remove the tag-to-record relationship via a tag's related-record subpanels. To remove a tag relationship, edit the tagged record's Tags field as explained in the Tagging via Record View section of this page.

For more information on viewing a tag record's related-record subpanels, please refer to the User Interface page. If a tag links to the global search's View All Results page, you will see the records related to the tag in search-result form. For more information on navigating and viewing global search's View All Results page, please refer to the Search documentation.

When clicking on a tag to view related records, only modules (e.g. Accounts, Contacts) that are enabled for global search will appear in the View All Results page. Please note that the Reports module is not enabled for global search.

Note: When viewing related records via the tag's record view or global search's View All Results page, please keep in mind that you will only be able to see records as allowed by your team membership, user access, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

The following table summarizes what you can expect when clicking on a tag from various locations in Sugar:

Tag Location	Tag Format	Tag Appearance	Result
Tags List View	Hyperlink	SugarCon 2016 Visitor	Opens the tag's record view
Report Results	Hyperlink	SugarCon 2016 Visitor	
My Tags Dashlet	Hyperlink	SugarCon 2016 Visitor	
Related Module List View Dashlet	Hyperlink	SugarCon 2016 Vi...	Opens global search View All Results page
Related Module List View	Hyperlink	SugarCon 2016 Visitor	
Related Module Record View	Pill	SugarCon 2016 Visitor	
Intelligence Pane (Preview)	Pill	SugarCon 2016 Visitor	
Subpanel List View	Hyperlink	SugarCon 2016 Visitor	

Global Search Bar	Tag Ribbon	◆ SugarCon 2016 Visitor	Adds the tag as a [Global Search](#) filter

Note: When editing a record, the tag pills displayed in the Tags field are not clickable.

Tag Fields

The Tags module contains a number of stock fields which come out-of-the-box with Sugar. The following definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

Field	Description
Name	The name or designation of the tag
Assigned To	The Sugar user assigned to the tag record
Date Created	The date the tag record was created
Date Modified	The date the tag record was last modified
Description	A description or other information about the tag

Working With Tags

When working with tags, common data management tasks such as editing, merging, and deleting are restricted to administrator users and users with administrator- or developer-role access to the Tags module. For more information on these administrative options, please refer to the [Tag Management](#) documentation in the Administration guide.

Tags can be created, added to records, and removed from records without visiting the Tags module by performing those actions directly in a Sugar record. Regular users need only access the Tags module to view tags and their related records in list view and record view. The Tags module offers tag administrators additional functionality that is covered in the [Tag Management](#) page of the Administration Guide.

Content Link	Description
[Viewing Tags](#)	There are various options available for

[Viewing via List View](#) [Viewing via Record View](#) [Viewing via Recently Viewed](#) [Viewing via Dashlets](#) [Viewing via Reports](#)	viewing tag records in Sugar including via Tags list view, Tags record view, Tags Recently Viewed menu, dashlets, and reports. Unlike other Sugar modules, users can see all tag records regardless of their team membership, but visibility may be affected by user access and assigned roles. For more information on access types and roles, please refer to the [Role Management](#) documentation in the Administration guide.
[Searching for Tags](#) [List View Search](#) [Creating a Filter](#) [Saving a Filter](#)	The Searching for Records section provides an introduction to searching for tag records via list view search, which searches and filters within the Tags module. Tags can also be used to narrow global search results for records in other modules. For more information, please refer to the [Using Tags in Global Search](#) section of this page.
[Tags List View](#) [Total Record Count](#) [List View Search](#) [Checkbox Selection](#) [Favorite Designation](#) [Column Reordering](#) [Column Resizing](#) [Column Sorting](#) [Column Selection](#) [Preview](#) [More Tags](#) [Dashboards](#)	The List View section walks through the many elements of the Tags List View layout, which contains a filterable list of all tag records in Sugar.
[Tags Record View](#) [Favorite Designation](#) [Next or Previous Record](#) [Subpanels](#) [Related Record Subpanels](#) [Filtering Subpanels](#) [Reordering Subpanels](#) [Dashboards](#)	The Record View section walks through the many elements of the Tags Record View layout, which contains detailed information about a single tag record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Tags record view are described in the [Record View Actions Menu](#) section of this page.
[Exporting Tags](#)	The Exporting Records section provides

	an introduction to the export functionality which allows you to download a list of tags and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).
Viewing Tag Audit Logs	The Viewing Record Audit Logs section describes the View Audit Log record view option which displays a history of changes to the tag's audited fields. **Note**: Only the Assigned User Id field is audited for the Tags module and will, therefore, be the only field displayed in the audit log.
Favoriting Tags Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking tags as favorites, including via the Tags list view and Tags record view. Favoriting a tag allows you to easily access it from list views, dashlets, or the Tags module tab.
Sharing Tags	The Sharing Records section provides instructions for the Share record view option, which composes an email with a link to the tag record. If the recipient is logged into Sugar, clicking the link will bring them directly to the tag's record view.

Tag Menus

The following sections describe the various menu options in the Tags module with links to more information about each option in the User Interface documentation or, for tag-specific functionality, within this page.

Module Tab Menus

The Tags module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar at the top of any Sugar screen. The additional modules will appear on the list and you can click "Tags" to access the list view.

Once the Tags module tab displays on the navigation bar, click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The [Recently Viewed menu](#) displays the list of tags you last viewed in the module. The Favorites menu displays the list of tags you most recently marked as favorites in the module. For information about favoriting records in Sugar, please refer to the [User Interface](#) documentation.

The Actions menu allows you to perform the following operation:

Menu Item	Description
[View Tags](#)	Opens the list view layout to search and display tags

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

- The Tags module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Tags module in the Hide Modules list, simply move it to the Display Modules list and save. For more information on hiding and displaying modules, please refer to the [Layout Options](#) section of the Getting Started documentation.
- The administrator may have disabled the Tags module for your entire Sugar instance. Reach out to your Sugar administrator to have the Tags module displayed and the Tags field added to Sidecar module layouts. For more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation in the Administration guide.

Record View Actions Menu

The tag's [record view](#) displays the fields relevant to the Tags module. To access a tag's record view, refer to the table within the [Clicking on Tags](#) section of this page. The record view's Actions menu appears on the top right of the record.

The Actions menu allows you to perform the following operations:

Menu Item	Description
[Share](#)	Share a link to this tag in Sugar via email
[View Audit Log](#)	View a record of changes to this tag's audited fields

Creating Tags

Regular users can create new tags by tagging records via the Tags field, [mass update](#), and [import](#) within Sugar Sidecar modules. Users with administrator or developer access can create Tag records in various ways directly via the Tags module. Please note that when a new tag is created and saved, all users will immediately be able to use that tag in any Sidecar module regardless of team restrictions.

Creating via Tags Field

All users can create new tags on the fly from the Tags field in any Sidecar module (Accounts, Contacts, etc.). This will automatically create a relationship between the record and the tag. Simply enter the name of the tag (e.g. skiing) in the Tags field to create the new tag record. Please note that the other fields (e.g. Assigned To, Date Created, etc.) in the Tags record view will automatically populate by default. For more information on creating tags via record view, please refer to the [Tagging via Record View](#) section of this documentation.

Note: Users will be able to edit the Tags field to create new tags regardless of any role restrictions the user has for the Tags module.

Creating via Tags Module

Another way to create tags is by using the Create Tag option in the Tags module. Only users with administrator or developer access to the Tags module will see the Create Tag option and Create button. For more information on creating tags via the Tags module, please refer to the [Tag Management](#) documentation in the Administration guide.

Tagging Records

Users can tag any record that contains a Tags field. By default, every [Sidecar module](#) (Accounts, Contacts, etc.) will contain the Tags field on its record view. When you create and save a new tag on any Sugar record, all users will immediately be able to use that tag in any tags-enabled module regardless of team restrictions. Please note that users will be able to edit the Tags field to add existing tags or create new tags regardless of any role restrictions the user has for the Tags module.

Only administrator and developer users can merge, delete, or update records within the Tags module. To assign a tag management role to a Sugar User, please refer to the [Creating a Tags Administrator](#) section of the Tag Management page in the Administration Guide.

Tagging via Record View

Tagging a record will automatically create a relationship between that record and the tag. Simply type the name of the tag into the Tags field and then click "Save" to tag a record. If the tag does not already exist, the tag will automatically be created including setting the Date Created field and assigning the tag to you. For more

information on available Tag fields, please refer to the [Tag Fields](#) section of this documentation.

Follow these steps to tag an account record as an example:

1. Navigate to an account's record view.
2. Click the Edit button on the upper right of the page or click inside the Tags field.

3. Type the word or phrase that you would like to use as a tag. When you enter the first letter of a tag, Sugar will begin to display recommended tags that begin with the same letter.
   - To choose an existing tag, select it from the list of recommended tags by clicking on the appropriate menu option.

   - To ignore the recommendations and create an entirely new tag, completely type out the word or phrase and then click on the New Tag menu option. Alternatively, use a comma or the Enter key to indicate the end of a tag. Take care not to create duplicate or synonymous tags unintentionally. Please note that new tags will not be saved to the database until you save the record that contains the new tag.

- To remove a tag or tags from a record, click the "x" on the tag to remove it from the Tags field and then save the current record. Alternatively, place the mouse cursor to the right of the tag and use the keyboard's backspace to highlight it. Press the backspace key again to remove the highlighted tag from the Tags field. Please note that removing an existing tag from a record will not remove it from the database; the tag will still exist, but it will no longer be related to this particular record.

4. Once you have entered the desired tag or tags, click the record's Save button to commit the changes to the record and save any new tags to the database.

If the saved record contains any new tags, those tags will be saved as new records in the Tags module. Users can now find the newly created tag when adding tags to any tags-enabled module record, and may also search and browse the list of available tags via the [Tags module list view](#).

Tagging via Mass Update

Users can also use the mass update function on a tags-enabled module to tag many records at one time. Mass update provides the following conveniences:

- Add one or many tags to a group of records
- Use any combination of new and existing tags
- Replace existing tags or append additional tags to existing tag lists

Follow these steps to tag multiple contact records via mass update as an example:

1. Navigate to the Contacts list view.
2. [Filter or search](#) for the set of records you would like to tag. For example, create a filter for all contacts whose titles start with "vp".

3. Select all results or select the checkboxes next to the appropriate records.

For more information about selecting multiple records at once, please refer to the [Checkbox Selection](#) section of the User Interface documentation.

4. Click on the list view Actions menu and select "Mass Update".

5. In the mass update bar, choose the Tags field and begin typing the phrases you would like to use as tags one at a time in the empty text box. When you enter the first letter of a tag, Sugar will begin to display recommended tags that begin with the same letter.

6. Click on the tag suggestion to add the pill to the mass-update text box, or click the New Tag suggestion to create a new tag. Alternatively, press enter or the comma key. Continue adding tags if desired. For more information on tagging records, please refer to the [Tagging via Record View](#) section of this documentation.

7. Decide if you would like to replace the existing tags on the selected records or if you prefer to append the specified tags to the records without removing their existing tags. By default, the Append Tag(s) checkbox is selected so that Sugar will not remove existing tags. Deselect this option to overwrite all existing data in the Tags field of the selected records.

8. Click "Update" to add the tag to all selected records.

Tagging via Import

Users can tag new or existing Sugar records by including the Tags field as a column in an import file. For more information on tagging via import, please refer to the [Importing Fields With Multiple Values](#) section of the Import documentation.

Please note that importing an update to the Tags field of a record that already exists in Sugar will erase any previous tags on the record and replace them with the imported tags. For more information on importing tags to existing records, please refer to [Importing Multiselect Fields to Existing Records](#) in the Import documentation.

Formatting Tag Imports

Tags are not case sensitive, but they must be entered as an exact character match in the import file when adding existing tags to records in order to prevent creating duplicate variations of the same tag. For example, if there is an existing tag named "rocky road" in Sugar, importing the tag "ROCKY ROAD" as all uppercase will successfully find and relate the existing tag. However, if the import file contains "rocky-road" with a hyphen, an unintentional synonymous tag will be created.

When importing tags to related module records (e.g. contacts), multiple tags being added to one record should be separated with a comma. For example, to create or update a contact record tagged as both "vanilla" and "chocolate", the import data file's Tags column should contain vanilla,chocolate with a comma separating the tags and no extra spaces between the tags. If one of the imported tags is a multi-word phrase, such as "rocky road", then the imported data field should contain a space character only within that tag value: vanilla,chocolate,rocky road.

	A	B	C
1	First Name	Last Name	Tags
2	Darryl	Aarons	vanilla,chocolate,rocky road

For more information on importing records with the Tags field, please refer to the [Import](#) documentation in the Application Guide.

Using Tags in Global Search

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

Users can locate and select tags as global search filters to easily locate groups of records that are tagged by common attributes. For example, if you have a set of leads that were acquired from a specific conference (e.g. 2015 Western Conference) and you wish to locate all the lead records tagged with this value, you can perform a search using the tag value. As you type the tag's name, a list of matching tags will appear in the tag ribbon beneath the search box and display up to five matching tags.

Click on the desired tag to apply it as a filter for the Global Search results. You can append additional search terms or tags in the search box to further narrow your search. Simply enter the keyword to the right of the current criteria and the matching result(s) will display below.

If you search using multiple tags, the system will look for records that match any one of the tags in the search box using the "or" operator. For more information on using Global Search, please refer to the [Search](#) documentation.

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Data Privacy

Overview

The Data Privacy module allows users to record and take action on data privacy requests and events in Sugar. This module is one portion of a feature set aimed at supporting your ability to carry out your organization's data privacy policies. Sugar's [Data Privacy Guide](#) provides information which spans the entire data privacy feature set and presents consolidated information and instructions for leveraging these tools to accomplish your organization's data privacy procedures. This Data Privacy Guide will describe these enhancements, the configuration steps an admin must complete before users can access the new functionality, as well as provide guidance for end users and Data Privacy Managers. This documentation will instead focus on the mechanics of using the module including its fields, options, menus, and how to perform common actions on data privacy records.

Data Privacy Fields

The Data Privacy module contains a number of stock fields which come out-of-the-box with Sugar. For information on using and and editing various field types, refer to the [User Interface](#) documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the Administration Guide.

Field	Description
Assigned To	The Sugar user assigned to the data privacy record
Business Purposes Consented for	Available when Type is set to "Consent to Process" or "Withdraw Consent, the various business purposes the individual

	is being asked to consent to or for which the individual is withdrawing consent. For more information about tracking consent, refer to the [Data Privacy Guide](#).
Comment Log	A shared log of messages, comments, or other text, including the name of the user that added the log entry and the date and time it was added. It is possible to tag other users and link to other Sugar records in Comment Log entries by inserting a clickable pill; see the [User Interface](#) documentation for more details.
Date Closed	User-populated recording of when the data privacy record was rejected or completed
Date Created	The date the data privacy record was created
Date Modified	The date the data privacy record was last modified
Date Opened	The date the data privacy record was created. This field will default to today's date upon creation, but can be modified by users if the actual request date differs from the creation date of the record
Description	A description or other information about the data privacy record
Due Date	For request types with time limits, the date by which the request must be completed
Follow Up Date	The internal follow-up date by which the data privacy request should be acted upon
Number	An automatically incremented number, uneditable by users, which identifies each data privacy record
Priority	The relative importance of the request or data privacy activity
Requested By	For request types, the individual who made the request to your organization

Resolution	Free form field to record how the request or activity was handled
Source	How the request or data privacy need originated (e.g. "Email from subject", "Gaining consent per policy", etc.)
Status	The status of the record which is automatically changed from "Open" to "Rejected" or "Completed" when an admin or a user in the [Data Privacy Mangaer role](#) clicks the "Complete" or "Reject" buttons at the top of the record.
Subject	A brief description of the request of activity that appears at the top of the record
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports **Note**: For more information on creating and using tags, please refer to the [Tags](#) documentation.
Teams	The Sugar team(s) assigned to the data privacy record
Type	The type of request or activity being handled in this record. For more information, refer to the [Data Privacy Types](#) section below.
Work Log	Free form field to add activities and notable events while working on the request or activity

Data Privacy Types

The Data Privacy module includes a Type field which captures the nature of the privacy event or request. You may wish to add, edit, or remove Type field values in order to match the kinds of activities and requests you will need to process and record, according to your organization's needs.

Three of the out-of-the-box Type values enable additional functionality in the Data Privacy module. You can edit their display labels, but the Item Name portions of the following options must remain unchanged in order to retain the full capabilities of the module:

Item Name (Cannot be changed)	Display Label	Functionality Enabled
Request to Erase Information	Request to Erase Information	Allows users in the Data Privacy Manager role to permanently erase personal information fields on records related to the data privacy record
Consent to Process	Consent to Process	Enables the "Business Purposes Consented for" field on the data privacy record
Withdraw Consent	Withdraw Consent	Enables the "Business Purposes Consented for" field on the data privacy record

For more information about modifying the available type values, refer to the [Data Privacy Guide](#).

Working With Sugar Modules

While the Data Privacy module has some features that only apply to data privacy records, it also uses the Sidecar user interface that most Sugar modules are based on. In the table below, the left column contains links to the User Interface page covering topics that are applicable to all Sidecar modules. The right column has links to sections of the current page that cover topics specific to data privacy.

General Instructions for Working With Sugar Modules	Data-Privacy-Specific Instructions
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Data-Privacy-specific help exists for each topic, use the links below to navigate to sections of the current page.
[Creating Records](#)	
[Viewing Records](#)	
[Searching for Records](#)	
[List View](#)	[List View Mass Actions Menu](#) [List View Record Actions Menu](#)
[Record View](#)	[Record View Actions Menu](#)
[Intelligence Pane](#)	

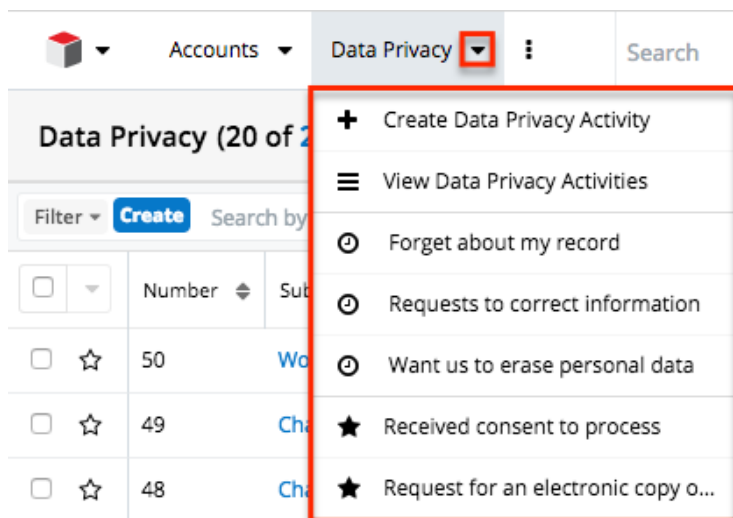|	
[Editing Records](#)	
[Deleting Records](#)	
[Exporting Records](#)	
[Viewing Record Audit Logs](#)	
[Favoriting Records](#)	
[Following Records](#)	
[Sharing Records](#)	

Data Privacy Menus

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

Module Tab Menus

The Data Privacy module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen. Sugar normally displays the top six modules shown in the Display Modules list of your user preferences with the remaining displayed modules grouped under the More tab. For more information on displayed modules for the navigation bar, please refer to the [Layout Options](#) section of the Getting Started documentation.

Note: By default, the Data Privacy module is hidden in Sugar and the system administrator must enable the module via Admin > Display Modules and Subpanels. For more information on displaying modules in Sugar, please refer to the [Developer Tools](#) documentation in the Administration Guide.

Click the tab to access the Data Privacy list view. You may also click the triangle in the Data Privacy module tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important operations within the module. The [Recently Viewed](#) menu displays the list of data privacy activities you most recently viewed. The [Favorites menu](#) displays the list of data privacy activities you most recently marked as favorites.

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

Menu Item	Description
Create Data Privacy Activity	Opens the record view layout to create a new data privacy activity
View Data Privacy Activities	Opens the list view layout to search and display data privacy activities

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

- The Data Privacy module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Data Privacy module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.
- The administrator may have disabled the Data Privacy module for your entire Sugar instance. Reach out to your Sugar administrator to have the Data Privacy module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration Guide.

List View Menus

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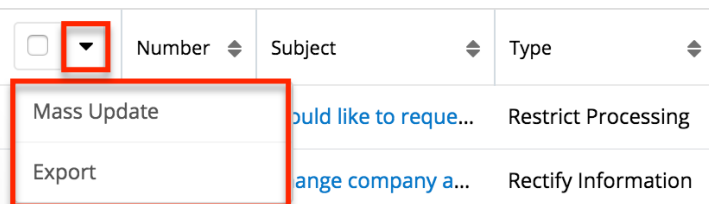
simply click the module's tab in the navigation bar at the top of any Sugar page.

List View Mass Actions Menu

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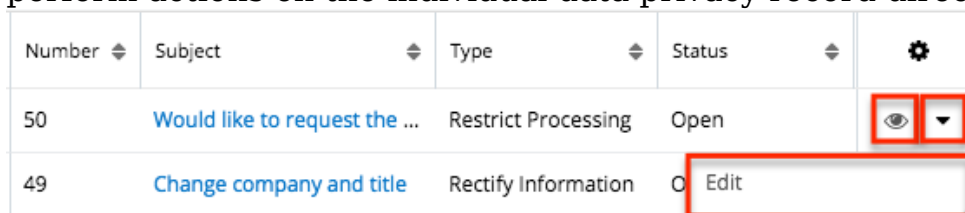

The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more data privacy records at a time
Export	Export one or more data privacy records to a CSV file

List View Record Actions Menu

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

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

Menu Item	Description
Preview (Eye icon)	Preview this data privacy in the intelligence pane

Edit	Edit this data privacy

Record View Actions Menu

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

The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this data privacy
Share	Share a link to this data privacy via email
View Audit Log	View a record of changes to this data privacy

Managing Data Privacy in Sugar

The Data Privacy module is one portion of a feature set aimed at supporting your ability to carry out your organization's data privacy policies. Sugar's Data Privacy Guide provides information which spans the entire data privacy feature set and presents consolidated information and instructions for leveraging these tools to accomplish your organization's data privacy procedures. This guide will describe these enhancements, the configuration steps an admin must complete before users can access the new functionality, as well as provide guidance for end users and Data Privacy Managers.

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