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# Sugar Ultimate 7.11 Application Guide

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<b>Sugar Ultimate 7.11 Application Guide</b> .....	29
<b>Introduction</b> .....	29
Overview .....	29
<b>Core Features</b> .....	29
Sales Force Automation .....	29
Marketing Automation .....	30
Customer Support .....	30
Record Keeping .....	30
Collaboration .....	30
Reporting .....	31
<b>Getting Started</b> .....	31
Overview .....	31
<b>Accessing Sugar</b> .....	31
Logging In .....	31
Resetting Your Password .....	32
Setting Your Language .....	34
Logging Out .....	36
Automatic Log Outs .....	38
<b>New User Wizard</b> .....	38
Configuring Your Information .....	39
Configuring Your Locale .....	39
<b>Tour</b> .....	40
<b>User Preferences</b> .....	41
<b>User Profile Tab</b> .....	42
User Profile .....	42
Employee Information .....	42
Email Settings .....	43
<b>Password Tab</b> .....	44
<b>Advanced Tab</b> .....	45
User Settings .....	45
Layout Options .....	46
Locale Settings .....	47
PDF Settings .....	48
Calendar Options .....	48
<b>External Accounts Tab</b> .....	51
<b>Access Tab</b> .....	52
Access Table .....	52
Roles .....	54
My Teams .....	54
<b>Downloads Tab</b> .....	55
<b>User Holidays</b> .....	56
Resetting a User's Preferences .....	58
<b>Accessing Support</b> .....	58
<b>Viewing Instance Information</b> .....	60
<b>User Interface</b> .....	61
Overview .....	61

---

Sidecar Modules	61
Navigation Bar	62
Home	63
Module Tabs	63
Global Search	65
Notifications	65
Notifications Severity Levels	67
Notifications List View	67
Notifications Record View	68
User Menu	70
Quick Create	71
Footer	72
Creating Records	73
Basic Record Creation	74
Creating via Quick Create	74
Creating via Subpanels	75
Creating via Duplication	76
Importing Records	76
Viewing Records	78
Viewing via List View	78
Viewing via Record View	78
Viewing via Recently Viewed	79
Viewing via Dashlets	79
Viewing via Activity Streams	81
Viewing via Preview	82
Viewing via Reports	82
Searching for Records	83
Global Search	84
List View Search	84
Creating a Filter	87
Saving a Filter	89
List View	90
Total Record Count	92
Create Button	92
List View Search	93
Refreshing Search Results	93
Checkbox Selection	93
Mass Actions Menu	95
Favorite Designation	97
Column Reordering	98
Column Resizing	98
Column Sorting	99
Column Selection	99
Preview	101
Record Actions Menu	101
More Records	103

---

Activity Stream	103
Dashboards	104
<b>Record View</b>	<b>106</b>
Favorite Designation	107
Following Designation	107
Next or Previous Record	107
Actions Menu	108
Show More	109
Subpanels	109
Related Record Subpanels	111
Filtering Subpanels	114
Reordering Subpanels	115
Refreshing Subpanels	116
Activity Stream	116
Dashboards	116
<b>Intelligence Pane</b>	<b>117</b>
Dashboards	117
Previews	117
Viewing Previews	118
Previewing From List Views	118
Previewing From Record View	120
Previewing From Activity Streams	122
Previewing From Global Search	124
Show More	126
Previewing a Record's Activity Stream	128
Previewing Next and Previous Records	130
Closing a Preview	131
<b>Editing Records</b>	<b>131</b>
Editing Inline via Record View	131
Editing via Record View	131
Editing Inline via Subpanels	133
Editing Inline via List View	133
Editing via List View Preview	134
Mass Editing via List View	134
Editing Fields	136
Using Team-Based Permissions	141
Locked Fields	142
<b>Deleting Records</b>	<b>143</b>
Deleting via Record View	144
Deleting via List View	144
Mass Deleting via List View	146
<b>Emailing Records</b>	<b>147</b>
Emailing via List View	147
Emailing via Quick Create	148
Emailing via the Emails Module	150
Emailing via Workflows	151

---

Emailing via Advanced Workflow .....	151
Exporting Records .....	151
Recalculating Calculated Values .....	152
Finding Duplicate Records .....	153
Merging Records .....	154
Merging via List View .....	155
Viewing Record Historical Summaries .....	157
Viewing Record Change Logs .....	160
Record PDFs .....	162
Downloading Record PDFs .....	162
Emailing Record PDFs .....	164
Favoriting Records .....	166
Favoriting via List View .....	167
Favoriting via Record View .....	167
Favoriting via Subpanel .....	168
Following Records .....	168
Following via List View .....	168
Following via Record View .....	170
Sharing Records .....	170
Using the TinyMCE Text Editor .....	172
User Interface (Legacy Modules) .....	173
Overview .....	173
Legacy Modules .....	174
List View .....	174
Basic Search .....	175
Advanced Search .....	176
Selecting Records .....	177
Mass Actions Menu .....	179
Delete .....	179
Mass Update .....	180
Favorite Designation .....	181
Edit Option .....	182
Column Sorting .....	183
Pagination .....	183
More Information .....	183
Detail View .....	184
Next or Previous Record .....	184
Actions Menu .....	185
Edit .....	186
Share .....	186
Copy .....	187
Delete .....	187
View Change Log .....	188
Field Panels .....	188
Subpanels .....	190
Activities and History .....	191

Layout	194
Actions	196
Column Sorting	198
Pagination	200
Edit View	200
Pagination	201
Editing Records	201
Editing Related Fields	201
Using the TinyMCE Text Editor	202
Using Team-Based Permissions	204
Activity Streams	205
Overview	205
Viewing Activity Streams	206
Viewing via Home Page	206
Viewing via List View	208
Viewing via Record View	208
Viewing via Intelligence Pane	209
Activity Stream Views	210
Post Options	211
Filter Options	211
Refresh Button	211
Preview Button	212
Comment Button	212
Post Icon	212
Right Hand Side Drawer	213
More Posts	213
Personalizing Activity Stream	214
Following Records	214
Favoriting Records	214
Unfollowing Records	214
Creating User Posts	215
Creating via Home Page	216
Creating via List View	216
Creating via Record View	216
User Post Options	217
Adding Rich Content and External Messages	217
Adding Attachments	219
Adding via Dashlets	221
Referencing Users and Records	223
Viewing Field Changes	225
Commenting on Posts	227
Previewing Posts	228
Accessibility	229
Overview	229
Shortcut Keys	230
Global Shortcut Keys	232

List View Shortcut Keys .....	232
Record View Shortcut Keys .....	234
Customizing Shortcut Keys .....	235
Tabbing in Sugar .....	236
Tabbing in Global Search .....	237
<b>Dashboards and Dashlets .....</b>	<b>237</b>
Overview .....	237
Understanding Dashboards .....	237
Dashboards in Views vs the Dashboards Module .....	238
Shared Dashboards .....	238
Teams Access .....	238
Favorites and Default Dashboards .....	239
Personalizing Shared Dashboards .....	239
Out-of-the-Box Default Dashboards .....	240
Using Dashboards and Dashlets .....	240
Creating Dashboards .....	243
Duplicating Dashboards .....	243
Editing Dashboards .....	244
Switching Between Dashboards .....	246
Deleting Dashboards .....	247
Removing Dashboards From Views .....	248
Adding Dashlets .....	248
Rearranging Dashlets .....	251
Editing Dashlets .....	253
Deleting Dashlets .....	254
Collapsing and Expanding Dashlets .....	255
Refreshing Dashlets .....	255
Managing Dashboards .....	257
Dashboard Module Fields .....	258
Working With the Dashboards Module .....	259
Sharing Dashboards With Teams .....	261
Pulling Dashboards to Your Views .....	262
Pushing Dashboards to Teams .....	262
Reassigning Dashboards .....	263
Commonly Used Dashlets .....	264
List View Dashlet .....	264
Creating a Filter .....	265
Steps to Edit a Dashlet .....	269
Active Tasks Dashlet .....	274
Inactive Tasks Dashlet .....	275
History Dashlet .....	277
Planned Activities Dashlet .....	279
Notes & Attachments Dashlet .....	280
My Activity Stream Dashlet .....	282
Opportunity Metrics Dashlet .....	284
Cases Summary Dashlet .....	284

RSS Feed Dashlet	285
Sales Pipeline Chart Dashlet	286
Saved Reports Chart Dashlet	289
Twitter Dashlet	293
Tweet to Case	296
Module-Specific Dashlets	297
Search	299
Overview	299
Global Search	300
Operators	305
Viewing All Results	307
Filtering the View All Results Page	308
Filtering by Module	310
Keyboard Navigation	311
Admin Configuration	312
Advanced Options	312
List View Search (Sidecar Modules)	313
Wildcards	314
AND vs OR	316
Filter	316
Creating a Filter	317
Preview	319
Record View Search (Sidecar Modules)	319
Related Records Search	320
Related Module	320
Wildcards	322
Filter	323
Creating a Related Records Filter	324
Activity Stream Search	326
Activity Type Filter	326
Preview	327
List View Search (Legacy Modules)	328
Basic Search	328
Advanced Search	329
Layout Options	330
Saved Search	332
AND vs OR	333
Wildcards	334
Search Memory	335
Admin Configuration	336
Home	336
Overview	336
Home Module Tab	337
Dashboards	337
Changing Home Dashboard Layouts	338
Dashlets	339



---

Commonly Used Dashlets .....	339
Adding Dashlets to Home Dashboards .....	340
My Legacy Dashboard .....	340
Activity Stream .....	341
Leads .....	342
Overview .....	342
Lead Fields .....	342
Working With Leads .....	345
Lead Menus .....	348
Module Tab Menus .....	348
List View Menus .....	350
List View Mass Actions Menu .....	350
List View Record Actions Menu .....	351
Record View Actions Menu .....	351
Lead Capture Forms .....	353
Lead Creation via Web-to-Lead Form .....	353
Lead Creation via Portal Registration .....	353
Converting Leads .....	353
Lead Conversion Options .....	354
Duplicate Record Check .....	354
Steps to Convert a Lead .....	355
Emails and Leads .....	360
Emails Subpanel .....	361
Calls, Meetings, and Leads .....	362
Calls and Meetings Subpanels .....	362
Campaigns and Leads .....	363
Adding to a Target List via Leads List View .....	363
Managing Lead Subscriptions .....	364
Campaign Log Subpanel .....	366
vCards and Leads .....	367
Creating Leads via vCard .....	367
Downloading a Lead's vCard .....	367
Contacts .....	368
Overview .....	368
Contact Fields .....	369
Working With Contacts .....	371
Contact Menus .....	375
Module Tab Menus .....	375
List View Menus .....	376
List View Mass Actions Menu .....	376
List View Record Actions Menu .....	378
Record View Actions Menu .....	380
Emails and Contacts .....	383
Emails Subpanel .....	383
Calls, Meetings, and Contacts .....	385
Calls and Meetings Subpanels .....	385

Campaigns and Contacts	385
Adding to a Target List via Contacts List View	385
Managing Contact Subscriptions	388
Campaign Log Subpanel	390
Converting Leads to Contacts	391
vCards and Contacts	393
Creating Contacts via vCard	394
Downloading a Contact's vCard	394
Accounts	395
Overview	395
Account Fields	395
Working With Accounts	397
Account Menus	401
Module Tab Menus	401
List View Menus	402
List View Mass Actions Menu	402
List View Record Actions Menu	404
Record View Actions Menu	405
Emails and Accounts	406
Emails Subpanel	406
Campaigns and Accounts	409
Adding to a Target List via Accounts List View	409
Campaign Log Subpanel	412
Leads and Accounts	413
Creating via Lead Conversion	413
Revenue Line Items	415
Overview	415
Revenue Line Item Fields	416
Sales Stages	422
Working With Revenue Line Items	424
Revenue Line Item Menus	427
Module Tab Menus	428
List View Menus	429
List View Mass Actions Menu	429
List View Record Actions Menu	430
Record View Actions Menu	430
Opportunities and Revenue Line Items	432
Creating Simultaneously With Opportunities	433
Deleting via Opportunities Module	434
Importing Revenue Line Items	434
Products and Revenue Line Items	435
Currencies and Revenue Line Items	435
Filtering on Currency Fields	436
Updating Currency Rates	436
Emails and Revenue Line Items	437
Emails Subpanel	437

Quotes and Revenue Line Items	438
Generating Quotes From Revenue Line Items	439
Generating a Quote via Subpanel	439
Generating a Quote via Record View	440
Generating Revenue Line Items From Quotes	442
Opportunities	444
Overview	445
Opportunity Fields	445
Working With Opportunities	448
Opportunity Menus	452
Module Tab Menus	452
List View Menus	453
List View Mass Actions Menu	453
List View Record Actions Menu	455
Record View Actions Menu	456
Revenue Line Items and Opportunities	457
Creating Revenue Line Items and Opportunities Simultaneously	458
Revenue Line Items Subpanel	459
Importing Opportunities	459
Quotes and Opportunities	459
Generating Opportunities From Quotes	459
Generating Quotes From Revenue Line Items	462
Emails and Opportunities	463
Emails Subpanel	463
Leads and Opportunities	465
Creating via Lead Conversion	465
Forecasts and Opportunities	467
Contacts and Opportunities	468
Currencies and Opportunities	468
Filtering on Currency Fields	469
Updating Currency Rates	469
Forecasts	470
Overview	470
Forecast Fields	471
Forecasts Module Tab	473
Forecast Actions	474
Sales Representatives	474
Time Periods	475
Summary and Commit History	475
Filters	476
Column Resizing	476
Column Sorting	477
Column Selection	477
Line Items and Totals	478
Editing Forecast Inclusion	478
Editing Revenue Line Item Fields	479

Currency Support	480
Intelligence Pane	480
In Forecast Dashlet	481
Forecast Bar Chart Dashlet	482
<b>Sales Managers</b>	483
Forecast Drilldown	484
Own Line Items	484
Reportee's Line Items	484
Team Worksheet	485
Management Hierarchy	486
Time Periods	486
Summary and Commit History	487
Column Resizing	488
Column Sorting	488
Column Selection	488
Filters	489
Intelligence Pane	489
In Forecast Dashlet	490
Forecast Bar Chart Dashlet	492
Saving Forecast Drafts	494
Committing Forecasts	494
Assigning Quotas	495
Exporting Forecasts	495
Configuring Forecasts	496
<b>Quotes</b>	496
Overview	496
Quote Fields	496
Quote Stages	500
Order Stages	500
Calculated Fields	501
Working With Quotes	503
Quote Menus	506
Module Tab Menus	506
List View Menus	507
List View Mass Actions Menu	508
List View Record Actions Menu	508
Record View Actions Menu	510
Quote Worksheet Options and Menus	511
<b>Building Quotes</b>	513
Quoted Line Item Groups	513
Creating Groups	513
Creating Empty Groups	513
Creating Groups from Quoted Line Items	514
Editing Groups	516
Deleting Groups	516
Quoted Line Items	517

Creating Quoted Line Items	517
Creating Custom Quoted Line Items	518
Creating Quoted Line Items via Product Catalog Dashlet	519
Creating Quoted Line Items Inline via Product Catalog	521
Editing Quoted Line Items	522
Moving Quoted Line Items	523
Deleting Quoted Line Items	523
Comments	524
Creating Comments	524
Editing Comments	525
Moving Comments	527
Deleting Comments	527
Product Catalog Dashlet	529
Viewing Products and Categories via Dashlet	530
Searching for Products and Categories via Dashlet	530
Previewing Products via Dashlet	532
Creating Opportunities from Quotes	534
Downloading Quotes as PDFs	535
Currencies and Quotes	537
Transaction Amount vs Converted Amount	540
Updating Currency Rates	541
Filtering on Currency Fields	541
Quoted Line Items	542
Overview	542
Quoted Line Item Fields	543
Working With Quoted Line Items	545
Quoted Line Item Menus	549
Module Tab Menus	549
List View Menus	550
List View Mass Actions Menu	550
List View Record Actions Menu	551
Record View Actions Menu	553
Quotes and Quoted Line Items	555
Creating Quoted Line Items via Quotes	555
Products and Quoted Line Items	555
Currencies and Quoted Line Items	556
Filtering on Currency Fields	557
Updating Currency Rates	557
Contracts	558
Overview	558
Contract Fields	559
Working With Contracts	560
Contract Menus	563
Module Tab Menus	563
List View Menus	565
List View Mass Actions Menu	565

List View Record Actions Menu	566
Record View Actions Menu	566
Relating Signed Documents	568
Pulling Latest Revision	568
Documents	569
Overview	569
Document Fields	569
Documents Module Tab	570
Creating Documents	572
Creating Via Documents Module	573
Creating Via Google Docs	573
Creating Via Quick Create	575
Creating Via Duplication	577
Viewing Documents	578
Viewing Via List View	578
Viewing Via Detail View	578
Viewing Via Recently Viewed	578
Viewing Via Dashlets	580
Viewing Via Reports	580
Searching Documents	581
Basic Search	581
Advanced Search	582
Global Search	583
Documents List View	584
Pagination	584
Checkbox Selection	585
Mass Actions Menu	585
Favorite Designation	586
Column Sorting	586
Documents Detail View	587
Actions Menu	587
Favorite Designation	588
Next or Previous Record	588
Subpanels	588
Related Records Subpanels	589
Document Revisions Subpanel	590
Editing Documents	591
Editing Via Detail View	591
Editing Via List View	591
Deleting Documents	592
Deleting Via Detail View	592
Deleting Via List View	592
Exporting Documents	593
Downloading Documents	594
Mass Updating Documents	595
Favoriting Documents	596

Favoriting Via List View .....	596
Favoriting Via Detail View .....	597
Favoriting Via Subpanel .....	597
Google Docs Integration .....	598
Calendar .....	598
Overview .....	598
Calendar Module Tab .....	598
Calendar Actions .....	599
Creating Activities .....	599
Creating via Calendar Grid .....	600
Creating via Actions Menu .....	602
Creating via Activities Modules .....	602
Creating via Quick Create .....	603
Adding Reminders .....	604
Adding Invitees .....	604
Adding via Add Invitees .....	604
Adding via Create an Invitee .....	605
Setting Meetings and Calls to Recur .....	605
Viewing via Calendar .....	606
Viewing Shared Calendar .....	609
Moving Scheduled Activities .....	609
More Information .....	610
Next or Previous Calendar View .....	611
Editing Activities .....	612
Editing Recurring Meetings and Calls .....	613
Deleting Calls and Meetings via Calendar .....	613
Shared Calendar .....	614
Publishing Calendars .....	615
Publishing Your Sugar Calendar .....	616
Publishing to Your Outlook Calendar .....	616
Integrating With MS Outlook .....	616
Integrating With IBM Lotus Notes .....	616
Calls .....	617
Overview .....	617
Call Fields .....	617
Calls Color Codes .....	620
Working With Calls .....	620
Call Menus .....	623
Module Tab Menus .....	623
List View Menus .....	625
List View Mass Actions Menu .....	626
List View Record Actions Menu .....	626
Record View Actions Menu .....	628
Call Guests .....	630
Adding via the Guests Panel .....	631
Adding via Create a Guest .....	632

Recurring Calls	633
Creating Recurring Calls	633
Editing All Recurrences via Record View	634
Deleting All Recurrences via Record View	635
Deleting All Recurrences via List View	636
Call Reminders	636
Email Reminders	637
Popup Reminders	637
Closing Calls	638
Closing via Record View	638
Closing via List View	640
Closing via Dashlet	641
Calendar Module and Calls	641
Viewing via Calendar	642
Creating via Calendar	642
Editing via Calendar	643
Meetings	644
Overview	644
Meeting Fields	645
Meetings Color Codes	648
Working With Meetings	648
Meeting Menus	651
Module Tab Menus	651
List View Menus	652
List View Mass Actions Menu	653
List View Record Actions Menu	653
Record View Actions Menu	655
Meeting Guests	657
Adding via the Guests Panel	658
Adding via Create a Guest	659
Recurring Meetings	660
Creating Recurring Meetings	660
Editing All Recurrences via Record View	661
Deleting All Recurrences via Record View	663
Deleting All Recurrences via List View	663
Meeting Reminders	664
Email Reminders	665
Popup Reminders	665
Closing Meetings	667
Closing via Record View	667
Closing via List View	669
Closing via Dashlet	671
Calendar Module and Meetings	672
Viewing via Calendar	672
Creating via Calendar	672
Editing via Calendar	674



<b>Emails</b> .....	674
<b>Overview</b> .....	674
<b>Sending and Receiving Email in Sugar</b> .....	675
Receiving Email .....	676
<b>Emails</b> .....	676
Email Fields .....	676
Working With Emails .....	678
<b>Email Menus</b> .....	681
Emails Module Tab Menu .....	682
List View Menus .....	683
List View Mass Actions Menu .....	683
List View Record Actions Menu .....	685
Record View Actions Menu .....	685
<b>Archiving Emails</b> .....	686
Manually Creating Archived Emails .....	687
<b>Composing Emails</b> .....	689
Working With Recipient Fields .....	689
Using the Address Book .....	690
Freehand Address Entry .....	691
Adding Attachments .....	691
Using a Template .....	693
Using an Email Signature .....	695
Saving and Editing Draft Emails .....	697
Sending Emails .....	698
Replying to Emails .....	698
Forwarding Emails .....	700
Relating Emails to Records .....	701
<b>Unlinking Emails</b> .....	702
<b>Email Templates</b> .....	703
Viewing Email Templates .....	703
Creating Email Templates .....	703
Email Template Fields .....	705
Inserting Template Variables .....	706
Editing Email Templates .....	707
<b>Email Signatures</b> .....	707
Viewing Email Signatures .....	708
Creating Email Signatures .....	708
Email Signature Fields .....	709
Editing Email Signatures .....	710
<b>Sugar Email Archiving Service</b> .....	710
Features and Limitations .....	711
Relating Archived Emails to Sugar Records .....	711
Email Assignment .....	712
<b>Outgoing Email Accounts</b> .....	712
Creating Outgoing Email Accounts .....	713
Editing Outgoing Email Accounts .....	715

Deleting Outgoing Email Accounts .....	715
<b>Tasks</b> .....	717
Overview .....	717
Task Fields .....	717
Task Due Date Colors .....	719
Working With Tasks .....	719
Task Menus .....	722
Module Tab Menus .....	723
List View Menus .....	724
List View Mass Actions Menu .....	724
List View Record Actions Menu .....	725
Record View Actions Menu .....	725
Task Dashlets .....	727
Active Tasks Dashlet .....	727
Inactive Tasks Dashlet .....	728
Closing Tasks .....	728
Closing via List View .....	729
Closing via Record View .....	729
Closing and Creating New via Record View .....	729
Closing via Subpanels .....	730
Closing via Dashlet .....	730
Calendar Module and Tasks .....	731
Viewing via Calendar .....	731
Creating via Calendar .....	733
Editing via Calendar .....	734
<b>Notes</b> .....	736
Overview .....	736
Note Fields .....	736
Working With Notes .....	737
Note Menus .....	740
Module Tab Menus .....	740
List View Menus .....	741
List View Mass Actions Menu .....	741
List View Record Actions Menu .....	742
Record View Actions Menu .....	743
<b>Targets</b> .....	744
Overview .....	744
Target Fields .....	744
Working With Targets .....	746
Target Menus .....	749
Module Tab Menus .....	749
List View Menus .....	751
List View Mass Actions Menu .....	752
List View Record Actions Menu .....	753
Record View Actions Menu .....	753
Converting Targets to Leads .....	756

Emails and Targets	758
Emails Subpanel	758
Campaigns and Targets	760
Adding to a Target List via Targets List View	761
Managing Target Subscriptions	763
Campaign Log Subpanel	765
vCards and Targets	767
Creating Targets via vCard	767
Downloading a Target's vCard	767
Target Lists	769
Overview	769
Target Lists Fields	770
Target List Types	771
Working With Target Lists	772
Target Lists Menus	774
Module Tab Menus	775
List View Menus	776
List View Mass Actions Menu	776
List View Record Actions Menu	777
Record View Actions Menu	777
Populating Target Lists	778
Populating via Individual Selection	778
Populating via Reports	779
Populating via Module List View	780
Populating via Importing Targets	781
Exporting Target List Members	783
Campaigns	783
Overview	783
Campaign Fields	784
Campaigns Module Tab	785
Prerequisites	786
Set Up Email	787
Campaign Diagnostic Tool	789
Campaign Types	791
Creating Campaigns	791
Creating Via Classic Option	791
Creating Via Duplication	792
Creating Target Lists	793
Creating Tracker URLs	794
Creating Redirect Tracker URLs	795
Creating Opt-Out Tracker URLs	796
Creating Email Marketing Records	797
Creating Email Templates	799
Inserting Variables	800
Inserting Tracker URLs	801
Testing Campaigns	802

Sending Campaigns .....	803
Viewing Campaign Status .....	804
Campaign Status Chart .....	805
Message Queue Subpanel .....	805
Campaign Response Subpanels .....	806
Campaign Results Subpanels .....	807
Viewing Campaign ROI .....	808
Viewing Campaigns .....	808
Viewing Via List View .....	808
Viewing Via Detail View .....	808
Viewing Via Recently Viewed .....	809
Viewing Via Dashlets .....	809
Viewing Via Reports .....	809
Searching Campaigns .....	810
Basic Search .....	810
Advanced Search .....	811
Global Search .....	812
Campaigns List View .....	813
Pagination .....	813
Checkbox Selection .....	814
Actions Menu .....	814
Favorite Designation .....	815
Campaign Status .....	815
Campaign Wizard .....	815
More Information .....	816
Column Sorting .....	816
Campaigns Detail View .....	816
Actions Menu .....	817
Favorite Designation .....	818
Next or Previous Record .....	818
Related Record Subpanels .....	818
Editing Campaigns .....	819
Editing Via Detail View .....	820
Editing Via List View .....	820
Deleting Campaigns .....	821
Deleting Via Detail View .....	821
Mass Deleting Via List View .....	821
Exporting Campaigns .....	822
Mass Updating Campaigns .....	822
Favoriting Campaigns .....	824
Favoriting Via List View .....	824
Favoriting Via Detail View .....	824
Sharing Campaigns .....	825
Marking Campaigns As Sent .....	825
Viewing Campaign Change Logs .....	826
Using the Campaign Wizard .....	827

---

Web-To-Lead Forms . . . . .	827
Overview . . . . .	827
Creating Web-To-Lead Forms . . . . .	827
Saving Web-To-Lead Forms . . . . .	830
Lead Generation . . . . .	831
Cases . . . . .	832
Overview . . . . .	832
Case Fields . . . . .	832
Working With Cases . . . . .	834
Case Menus . . . . .	837
Module Tab Menus . . . . .	837
List View Menus . . . . .	839
List View Mass Actions Menu . . . . .	839
List View Record Actions Menu . . . . .	839
Record View Actions Menu . . . . .	840
Emails and Cases . . . . .	842
Creating Cases via Inbound Email . . . . .	842
Email Case Macro . . . . .	843
Emails Subpanel . . . . .	844
Sugar Portal and Cases . . . . .	845
Twitter Dashlet and Cases . . . . .	846
Contacts and Cases . . . . .	847
Knowledge Base Articles and Cases . . . . .	849
Knowledge Base . . . . .	850
Overview . . . . .	850
Article Fields . . . . .	851
Article Statuses . . . . .	853
Working With Articles . . . . .	854
Article Menus . . . . .	857
Module Tab Menus . . . . .	857
List View Menus . . . . .	860
List View Mass Actions Menu . . . . .	860
List View Record Actions Menu . . . . .	861
Record View Actions Menu . . . . .	861
Sugar Portal and Articles . . . . .	864
Publishing Articles . . . . .	866
Publishing Articles Immediately . . . . .	866
Scheduling a Future Publish . . . . .	867
Viewing Published Articles by Category . . . . .	867
Creating Articles via Cases . . . . .	868
Article Templates . . . . .	869
Applying Templates to Articles . . . . .	869
Article Ratings . . . . .	870
Viewing Article Ratings . . . . .	870
Viewing Useful Published Articles . . . . .	871
Article Attachments . . . . .	871

Article Localizations	872
Creating Localization Articles	872
Localizations Subpanel	874
Published Articles in Other Languages Dashlet	875
Article Revisions	876
Creating Revision Articles	876
Deleting Revision Articles	878
Revisions Subpanel	878
Article Categories	880
Categories List View	880
Creating Categories	883
Creating via Categories List View	883
Creating via Category Field	884
Renaming Categories	885
Moving Categories	886
Moving via Drag and Drop	886
Moving via Record Actions Menu	886
Deleting Categories	887
Bugs	888
Overview	888
Bug Fields	889
Working With Bugs	890
Bug Menus	893
Module Tab Menus	894
List View Menus	895
List View Mass Actions Menu	895
List View Record Actions Menu	897
Record View Actions Menu	899
Sugar Portal and Bugs	902
Emails and Bugs	903
Emails Subpanel	903
Creating a Knowledge Base Article	906
Projects	907
Overview	907
Project Fields	907
Projects Module Tab	908
Creating Projects	909
Creating via Projects Module	909
Creating via Quick Create	910
Creating via Project Template	911
Viewing Projects	911
Viewing via List View	912
Viewing via Detail View	912
Viewing via Recently Viewed	912
Viewing via Project Dashboard	912
Viewing via Dashlets	913

Viewing via Reports .....	913
Searching Projects .....	914
Basic Search .....	914
Advanced Search .....	915
Global Search .....	916
Projects List View .....	917
Pagination .....	917
Checkbox Selection .....	918
Actions Menu .....	918
Favorite Designation .....	919
More Information .....	919
Column Sorting .....	919
Projects Detail View .....	919
Actions Menu .....	920
Favorite Designation .....	921
Next or Previous Record .....	921
Subpanels .....	921
Resources Subpanel .....	921
Project Tasks Subpanel .....	922
Project Holidays Subpanel .....	923
Activities and History Subpanels .....	923
Related Record Subpanels .....	924
Editing Projects .....	925
Editing via Detail View .....	926
Editing via List View .....	926
Deleting Projects .....	927
Deleting via Detail View .....	927
Mass Deleting via List View .....	927
Exporting Projects .....	928
Exporting to Microsoft Project .....	929
Mass Updating Projects .....	929
Favoriting Projects .....	930
Favoriting via List View .....	931
Favoriting via Detail View .....	931
Favoriting via Subpanel .....	931
Project Templates .....	931
Project Resources .....	932
Project Resource Reports .....	933
Project Holidays .....	935
Project Tasks .....	935
Project Task Fields .....	935
Project Tasks Module Tab .....	938
Creating Project Tasks .....	938
Viewing Project Tasks .....	940
Viewing Project Tasks via Gantt Chart .....	940
Viewing Project Tasks via My Projects Dashboard .....	940

Viewing Project Tasks via List View	941
Viewing Project Tasks via Detail View	941
Viewing Project Tasks via Recently Viewed	941
Viewing Project Tasks via Dashlets	941
Viewing Project Tasks via Reports	942
Searching Project Tasks	943
Project Tasks Basic Search	943
Project Tasks Advanced Search	944
Project Tasks List View	945
Project Tasks Pagination	946
Project Tasks Checkbox Selection	946
Project Tasks Actions Menu	947
Favorite Designation	947
Project Tasks More Information	947
Project Tasks Column Sorting	948
Project Tasks Detail View	948
Project Tasks Actions Menu	948
Favorite Designation	949
Next or Previous Project Task Record	949
Project Tasks Subpanels	950
Project Tasks Related Record Subpanels	950
Project Tasks Activities and History Subpanels	951
Project Tasks Gantt Chart	952
Gantt Chart Toolbar	952
Editing Project Tasks	954
Editing Project Tasks via Detail View	954
Editing Project Tasks via Gantt Chart	955
Editing Project Tasks via List View	955
Deleting Project Tasks	956
Deleting Project Tasks via Gantt Chart	956
Mass Deleting Project Tasks via List View	957
Exporting Project Tasks	958
Mass Updating Project Tasks	958
Favoriting Project Tasks	959
Favoriting via List View	960
Favoriting via Detail View	960
Reports	960
Overview	960
Report Fields	961
Working With Reports	962
Report Menus	963
Module Tab Menus	963
List View Menus	965
List View Mass Actions Menu	965
List View Record Actions Menu	965
Detail View Actions Menu	967



Report Types	968
Rows and Columns	968
Summation	969
Summation Report with Details	969
Matrix	969
Creating Reports	969
Creating via Reports Module	970
Rows and Columns Report	970
Summation Report	974
Summation Report with Details	980
Matrix Report	982
Creating via Duplication	984
Report Options	985
Report Filters	985
Target Module Filters	985
Related Module Filters	986
Filter Values	987
Run-Time Filters	988
Operators	989
Filter Groups	989
Filters on Tag Fields	990
Filters on Date and Datetime Fields	991
Report Display Columns	994
Changing Display Column Labels	994
Changing Display Column Order	994
Defining Column Sort	994
Optional Related Modules	995
Show Query	996
Reports Detail View	996
Favorite Designation	996
Run-time Filters	997
Report Details	997
Report Chart	998
Drilling Through Report Charts	1.000
Report Chart Options	1.002
Report Results	1.003
Rows and Columns Report Result	1.003
Summation Report Result	1.003
Summation Report with Details Result	1.004
Matrix Report Result	1.006
Viewing Currency Fields	1.006
Running Reports	1.007
Editing Reports	1.007
Editing via Detail View	1.008
Deleting Reports	1.008
Deleting via Detail View	1.009

Exporting Reports	1.009
Printing Reports as PDFs	1.011
Scheduling Reports	1.012
Scheduling via Detail View	1.012
Scheduling via List View	1.014
Favoriting Reports	1.015
Favoriting via Detail View	1.015
Sharing Reports	1.015
Adding Report Results to Target Lists	1.016
Advanced Reports	1.017
Overview	1.017
Advanced Reports Module Tab	1.017
Creating Advanced Reports	1.019
Custom Query Fields	1.019
Creating Custom Query Records	1.020
Data Format Fields	1.022
Creating Data Format Records	1.024
Advanced Report Fields	1.025
Creating Advanced Report Records	1.025
Relating the Advanced Report and Data Format Records	1.027
Running Advanced Reports	1.027
Aggregating Queries on a Single Report	1.027
Adding Multiple Data Formats to a Report	1.028
Interlocking Parent/Child Queries	1.028
Column-Level Formatting	1.030
Formatting a Column's Header	1.030
Formatting a Column's Body	1.031
Hiding Columns	1.033
Reordering Columns	1.034
Scheduling Advanced Reports	1.034
Scheduling Via List View	1.035
Exporting Data Formats	1.036
Exporting Via Advanced Reports	1.036
Exporting Via Data Formats	1.036
Stock Reports	1.037
Overview	1.037
Viewing Stock Reports	1.037
Editing Stock Reports	1.037
Stock Reports by Module	1.038
Account Reports	1.038
Call Reports	1.038
Case Reports	1.039
Contact Reports	1.039
Lead Reports	1.040
Meeting Reports	1.040
Opportunity Reports	1.040

Task Reports .....	1.041
Tracker Reports .....	1.042
Restoring Deleted Stock Reports .....	1.042
<b>Processes .....</b>	<b>1.042</b>
Overview .....	1.042
Process Fields .....	1.043
Working With Processes .....	1.044
Process Menus .....	1.045
Module Tab Menu .....	1.045
List View Record Actions Menu .....	1.048
Record View Actions Menu .....	1.048
Viewing Processes .....	1.049
Viewing Via Dashlet .....	1.049
Viewing Via List View .....	1.051
Executing Processes .....	1.051
Approval Processes .....	1.051
Approval Process Actions Menu .....	1.052
Executing an Approval Process .....	1.053
Routed Processes .....	1.054
Routed Process Actions Menu .....	1.055
Executing a Routed Process .....	1.056
Self-Service Processes .....	1.057
Self-Service Process Actions Menu .....	1.057
Claiming a Self-Service Process .....	1.058
Choosing a New Process User .....	1.059
Choosing a New Assigned To User .....	1.062
Viewing Details About a Running Process .....	1.065
Viewing Process History .....	1.066
Viewing Process Notes .....	1.067
Previewing the Process Design .....	1.068
Terminated vs. Cancelled Processes .....	1.070
<b>Export .....</b>	<b>1.070</b>
Overview .....	1.070
Exporting From Module List Views .....	1.070
Exporting From Sidecar Module List Views .....	1.071
Exporting From Legacy Module List Views .....	1.072
Exported Files From List View .....	1.073
Exporting From Reports .....	1.073
Exported Files From Reports .....	1.074
<b>Import .....</b>	<b>1.075</b>
Overview .....	1.075
Import Guidelines .....	1.076
Importing New Records .....	1.077
Importing Updates to Existing Records .....	1.083
Importing Fields With Multiple Values .....	1.090
Importing Multiselect Fields to New Records .....	1.090

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Importing Multiselect Fields to Existing Records	1.091
Importing Relationships	1.092
Importing Team-Based Permissions	1.107
Import File Template	1.107
Saving Field Mappings	1.108
Detecting Duplicates	1.109
External Data Sources	1.109
Importing Data From Google	1.110
Admin Import Wizard	1.111
<b>Employees</b>	1.112
Overview	1.112
Employee Fields	1.112
Employees Module Tab	1.113
Viewing Employees	1.114
Viewing Via List View	1.114
Viewing Via Detail View	1.114
Viewing Via Recently Viewed	1.115
Searching Employees	1.115
Basic Search	1.115
Advanced Search	1.116
Employees List View	1.117
Pagination	1.117
Column Sorting	1.118
Employees Detail View	1.118
Next or Previous Record	1.118
<b>Mobile Browser</b>	1.119
<b>Tags</b>	1.119
Overview	1.119
Understanding Tag Behavior	1.120
Clicking on Tags	1.120
Tag Fields	1.122
Working With Tags	1.122
Tag Menus	1.124
Module Tab Menus	1.124
Record View Actions Menu	1.125
Creating Tags	1.127
Creating via Tags Field	1.127
Creating via Tags Module	1.127
Tagging Records	1.128
Tagging via Record View	1.128
Tagging via Mass Update	1.131
Tagging via Import	1.132
Formatting Tag Imports	1.133
Using Tags in Global Search	1.133

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# Sugar Ultimate 7.11 Application Guide

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.

Last Modified: 2017-12-14 00:57:14

## Introduction

### Overview

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

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

### Core Features

#### Sales Force Automation

- Target, Lead, and Contact management to direct and organize efforts throughout the sales life cycle
- Account management to aggregate interactions with organizations and individuals
- Opportunity management to pursue new business, share sales information, and track deal progress
- Sales Forecasting to enable sales representatives and managers to understand upcoming business

- 
- Quote management to prepare potential sale figures including multiple line items, currencies, and tax codes
  - Quoted Line Item management to capture the details of your organization's goods and services

## Marketing Automation

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

## Customer Support

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

## Record Keeping

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

## Collaboration

- Shared Email and Calendar to provide visibility across individuals and teams
- Connectors and tools to leverage third-party information regarding your

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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

Last Modified: 2018-02-09 19:52:13

## 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.

### Accessing Sugar

#### Prerequisites

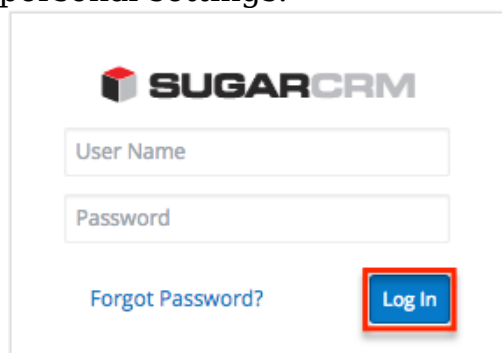
The following will need to be installed and configured on your local machine prior to accessing Sugar:

- 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

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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.



## 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.

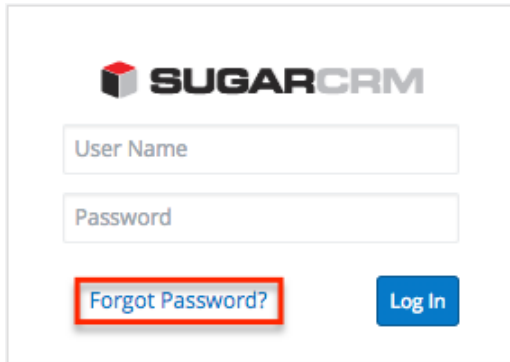
Use the following steps to request a new password:

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



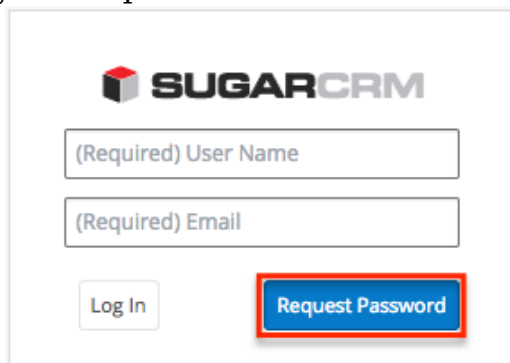


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The screenshot shows the SugarCRM login interface. At the top is the SugarCRM logo. Below it are two input fields: 'User Name' and 'Password'. At the bottom, there are two buttons: 'Forgot Password?' (highlighted with a red box) and 'Log In'.

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.



The screenshot shows the 'Request Password' screen. At the top is the SugarCRM logo. Below it are two input fields: '(Required) User Name' and '(Required) Email'. At the bottom, there are two buttons: 'Log In' and 'Request Password' (highlighted with a red box).

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.





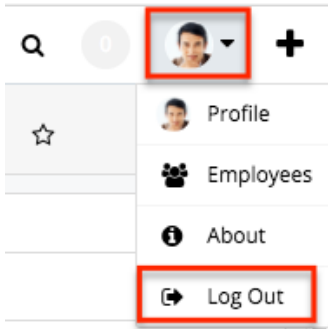
The following languages are available for use in Sugar:

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

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

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

Please note that users can have multiple tabs of Sugar pages open within the same web browser (e.g. Chrome) without getting logged out of the system. 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

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

## Configuring Your Information

The Your Information step of the New User Wizard allows you to enter basic information (e.g. name, email address, phone) 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.

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".

1 User Profile  
Setup your user information

Setup progress

First name	Last name
<input type="text" value="jim"/>	<input type="text" value="Brennan"/>
Email	Phone
<input type="text" value="jim@example.com"/>	<input type="text" value="(415) 226-8888"/>

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.

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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".

**2 User Locale Settings** Setup progress  
Set your time zone, date, and name formats

Time Zone: America/Los Angeles (GMT-8:00) | Time Format: 11:00 pm  
Date Format: 12/23/2010 | Name Format: Dr. David Livingstone

Back 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.

**Setup Complete** Start using Sugar! Setup progress

Sugar Training | Documentation | Knowledge Base | Forums

Back Start Sugar

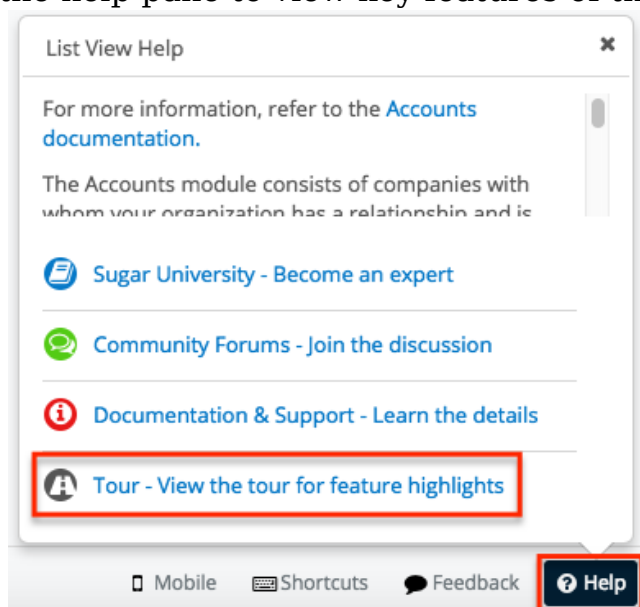
## Tour

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



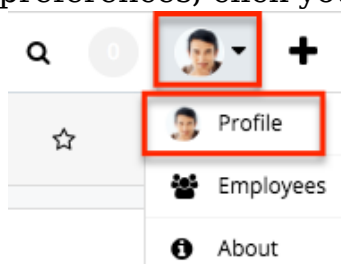
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click "Tour" in the help pane. The Welcome to Sugar window will appear and include links which provide access to additional resources (e.g. training, documentation). Click the appropriate link in the window to be directed to the specific page (e.g. 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".




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## User Profile Tab

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

### User Profile

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

User Profile	Password	Advanced	External Accounts	Downloads
User Profile				
User Name: *	max	First Name:	Max	
Status: *	Active	Last Name: *	Jensen	
User Type:	Regular User User can access modules and records based on team security and roles.			
Avatar:				

### 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 more information on administrator updates to the Employee Information section, please refer to the User Management

documentation.

Employee Information

Employee Status:	Active	Work Phone:	<input type="text"/>
Title:	Account Rep	Mobile:	<input type="text"/>
Department:		Other Phone:	<input type="text"/>
Reports to:	Sarah Smith	Fax:	<input type="text"/>
		Home Phone:	<input type="text"/>
IM Type:	<input type="text"/>	IM Name:	<input type="text"/>
Address Street:	<input type="text"/>		
Address State:	<input type="text"/>	Address City:	<input type="text"/>
Address Country:	<input type="text"/>	Address Postal Code:	<input type="text"/>
Description:	<input type="text"/>		

## Email Settings

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

Email Settings

Email Address: \*  Primary  Reply-to

Email Client:

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.

- 
- 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.

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.

User Profile **Password** Advanced External Accounts Downloads

**Password**

Current Password

New Password

Confirm Password

- ✗ Must contain one upper case letter (A-Z)
- ✗ Must contain one lower case letter (a-z)
- ✗ Must contain one number (0-9)
- ✗ Minimum Length =6

## 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.

User Profile Password **Advanced** External Accounts Downloads

**User Settings**

Export Delimiter:  *i*

Import/Export Character Set:  *i*

Show Full Names:  *i*

Default Teams:  *i*   Primary

Notify on Assignment:  *i*

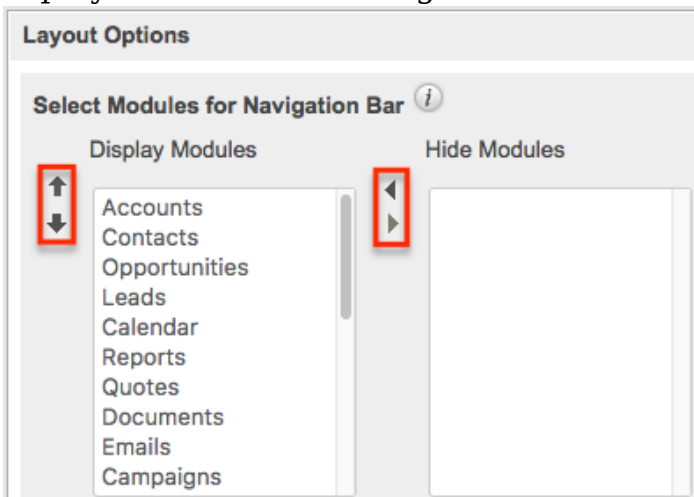
Reminders:  Popup  Email all invitees  *i*

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
- **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.



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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.

Locale Settings			
Date Format: <i>i</i>	2010-12-23 ▾	Preferred Currency: <i>i</i>	US Dollar : \$ ▾
		Show Preferred Currency: <i>i</i>	<input type="checkbox"/>
Time Format: <i>i</i>	23:00 ▾	System Significant Digits:	2 ▾
Time Zone: <i>i</i>	UTC (GMT+0:00) ▾	Example:	\$123,456,789.00
		1000s separator: <i>i</i>	,
Name Display Format: <i>i</i>	Dr. David Livingstone ▾	Decimal Symbol: <i>i</i>	.

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

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

- 
- Show Preferred Currency : Mark the checkbox to convert the base currency to user-preferred currency in list views and record views.
  - Currency Significant Digits : Select how many digits will appear after the decimal symbol for currencies.
  - 1000s Separator : Enter the default character used to separate numeric values in the thousands.
  - Decimal Symbol : Enter the default character used as the decimal symbol.

## PDF Settings

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

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

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

PDF Settings	
Font for Header and Body: <i>i</i>	DejaVuSans
Main Font Size:	8
Font for Footer: <i>i</i>	DejaVuSans
Data Font Size:	8

## 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



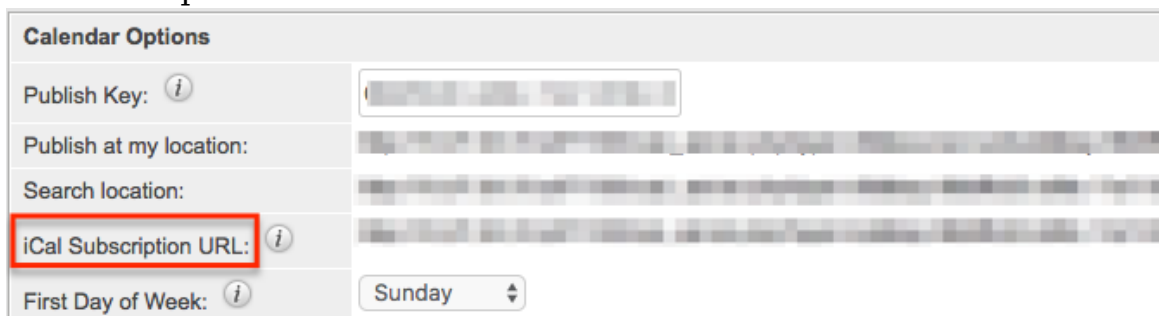
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publish key information to view your Sugar calendar via the external calendar application.

- **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).

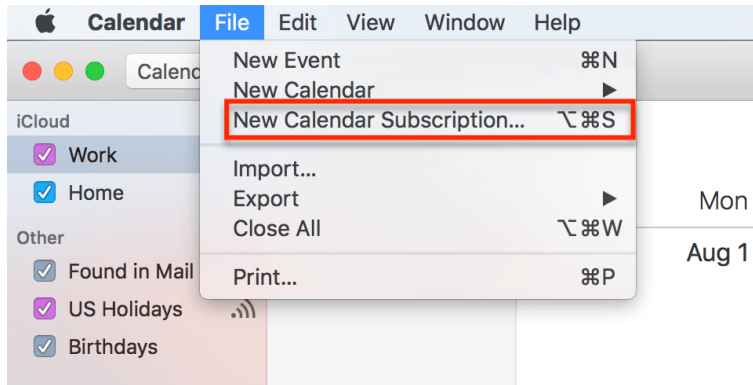
Use the following steps to integrate the external calendar application with your Sugar calendar:

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

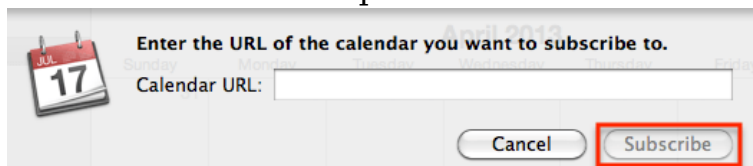


The screenshot shows a 'Calendar Options' section with several fields. The 'iCal Subscription URL' field is highlighted with a red box. The other fields are: 'Publish Key' (with an information icon), 'Publish at my location:', 'Search location:', and 'First Day of Week' (with an information icon and a dropdown menu set to 'Sunday').

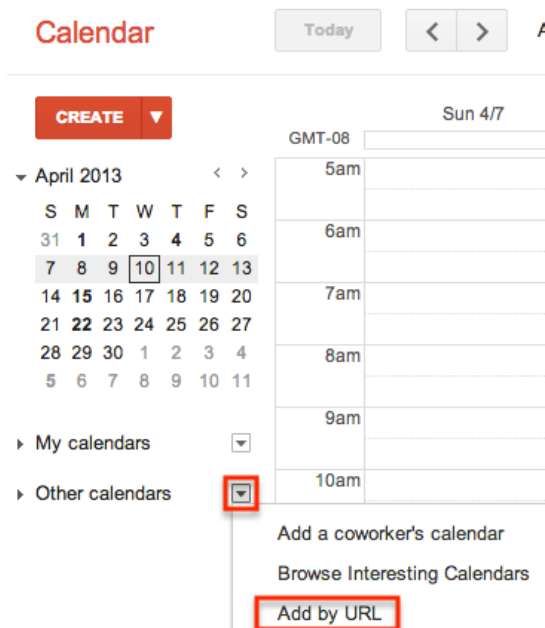
2. Copy the iCal Subscription URL then paste the value into your iCal compatible calendar application.
  - For Apple Calendar:
    - Click "File" then select "New Calendar Subscription".



- 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".

#### Add by URL

URL:

If you know the address to a calendar (in iCal format), you can type in the address here.

Make the calendar publicly accessible?

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

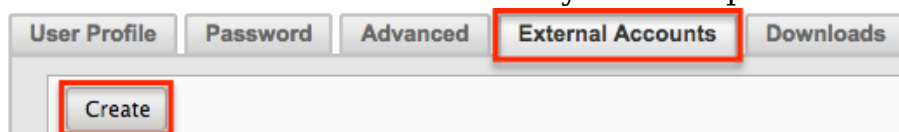
The External Accounts tab allows users to connect to external applications (e.g. Google, GoToMeeting, WebEx) from Sugar. Please note that you must have an existing account with the external application prior to connecting in Sugar.

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

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".



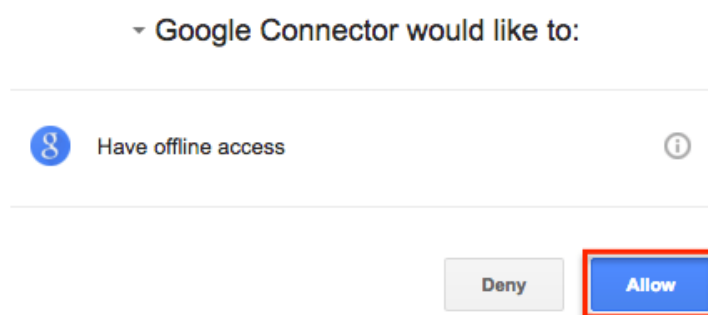
2. Select "Google" in the Application field then click the Connect button.
  - Note: If the Google option is not available to select in the Application field, the Google connector may not have been configured properly via

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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

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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.

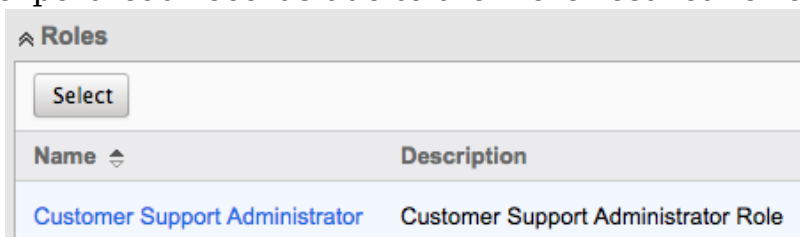
- Not Set : Does not restrict or grant access to this function and actions default to having "All" access when selected.
- None : The user is not able to perform this action while using this module.

	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

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	
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

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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 commercial editions of Sugar and must be installed on each Windows computer running the Microsoft Office application where the plug-in is desired. Lotus Notes plug-in allows you to integrate with Sugar by synchronizing meetings, tasks, and contacts, as well as archiving emails to records in your instance. The plug-in comes with the Enterprise or Ultimate editions of Sugar and is available for purchase a la carte for Professional and Corporate customers.

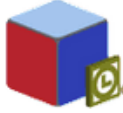
To download the plug-in(s), click the appropriate file that corresponds with your version and bitrate of Microsoft Office Excel, Outlook, or Word. Please be sure to check for the correct version and bitrate of your Microsoft Office application in order to download the correct file for installation. For 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 Profile Password Advanced External Accounts **Downloads**

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**Sugar Plug-ins for Microsoft Office™**

Read about the plug-in features within the [Plug-ins Documentation](#).

 **Sugar Plug-in for Outlook**  
Integrate Sugar e-mail and calendar information with Microsoft Outlook.


- [Sugar Plug-in for Outlook 2010 32bit](#)
- [Sugar Plug-in for Outlook 2010 64bit](#)
- [Sugar Plug-in for Outlook 2013 32bit](#)
- [Sugar Plug-in for Outlook 2013 64bit](#)
- [Sugar Plug-in for Outlook 365 32bit](#)
- [Sugar Plug-in for Outlook 365 64bit](#)

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 **Sugar Plug-in for Word**  
Automatically populate information from SugarCRM into form letters, dire

- [Sugar Plug-in for Word 2010 32bit](#)
- [Sugar Plug-in for Word 2010 64bit](#)
- [Sugar Plug-in for Word 2013 32bit](#)
- [Sugar Plug-in for Word 2013 64bit](#)
- [Sugar Plug-in for Word 365 32bit](#)
- [Sugar Plug-in for Word 365 64bit](#)

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 **Sugar Plug-in for Excel**  
Integrate Sugar with spreadsheets for better analysis of key metrics.

- [Sugar Plug-in for Excel 2010 32bit](#)
- [Sugar Plug-in for Excel 2010 64bit](#)
- [Sugar Plug-in for Excel 2013 32bit](#)
- [Sugar Plug-in for Excel 2013 64bit](#)
- [Sugar Plug-in for Excel 365 32bit](#)
- [Sugar Plug-in for Excel 365 64bit](#)

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**Sugar Plug-ins for Lotus Notes™**

Read about the plug-in features within the [Plug-ins Documentation](#).

 **Sugar Plug-in For Lotus Notes**  
Integrate Sugar with Lotus Notes.

- [SugarPlug-inForLotusNotesInstaller](#)

## 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.





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### ^ User Holidays

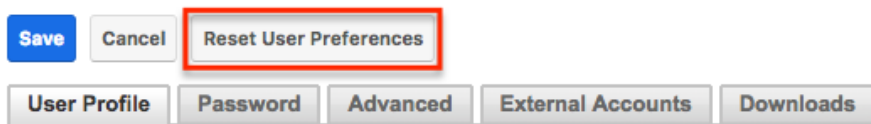
<b>Create</b>	
<b>Holiday Date:</b> ↕	<b>Description:</b>
2017-12-27	PTO

## 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.

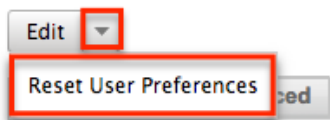
From edit view:

[Max Jensen](#) » [Edit](#)



From detail view:

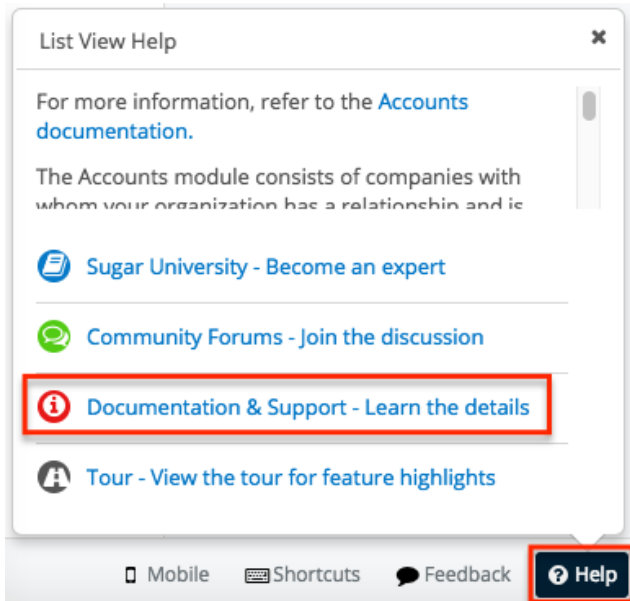
Max Jensen



## 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.

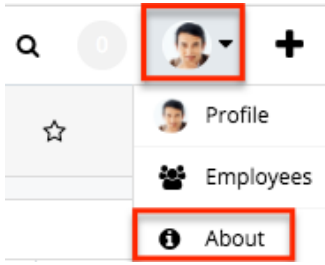
The Training section directs you to the Sugar University page where you can find a variety of training options to help end users, administrators, and developers. You can find self-paced videos or e-courses, live training and webinars, personalized training, and pursue Sugar certification. The Community 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 version and edition of your

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instance.



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## User Interface

### Overview

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

### Sidecar Modules

This documentation will cover the user interface that was introduced in Sugar 7 called "Sidecar". Below is a list of modules which use the Sidecar user interface. Other modules continue to use the Legacy user interface which is described in detail in the User Interface (Legacy) documentation.

- Accounts
- Bugs
- Calls
- Cases
- Contacts
- Contracts
- Emails
- Forecasts
- Home
- Knowledge Base
- Leads
- Meetings

- Notes
- Opportunities
- Processes
- Quoted Line Items
- Quotes
- Reports
- Revenue Line Items
- Tags
- Targets
- Target Lists
- Tasks

Note: 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.

## 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:

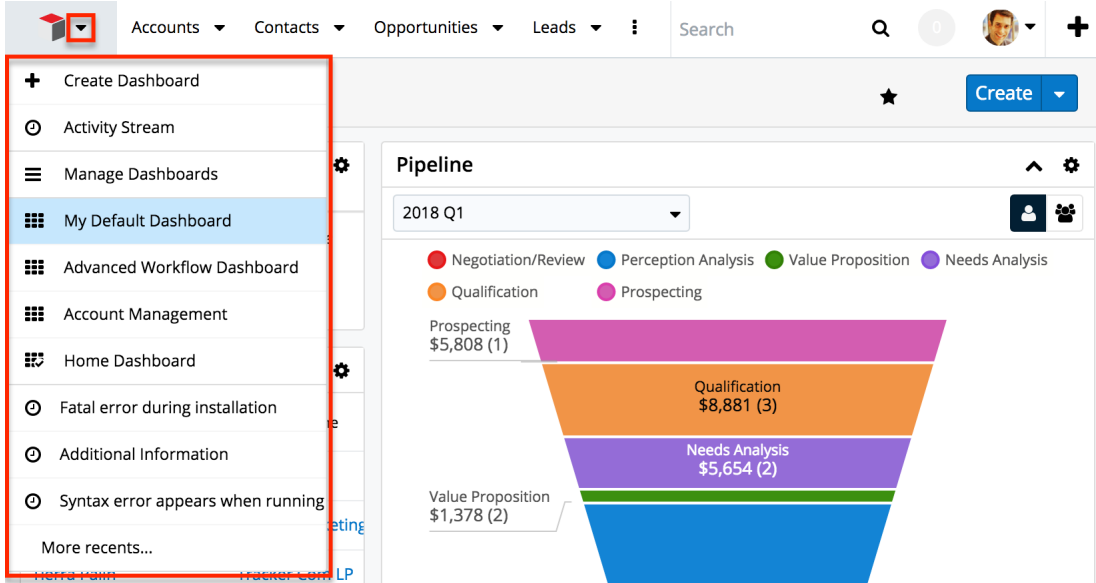


Navigation Bar Item	Description
Home	Click the Sugar Cube icon on the upper left to access your Home page dashboards as well as your Activity Stream.
Module Tabs	Both stock and custom modules can be displayed in the navigation bar. Click the module name to open its list view or click the triangle to 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.
Quick Create	Click the Plus icon to open the Quick Create menu which allows you to create records from anywhere in Sugar.

## Home

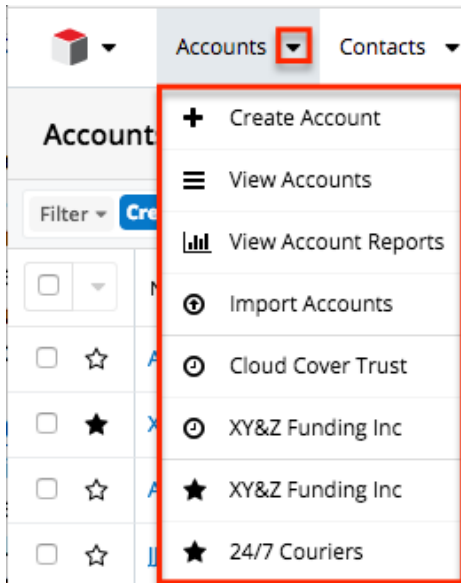
You can access your Home page from anywhere in Sugar by clicking the Cube icon at the top left of every page. Sugar's home page houses full-page dashboards and your instance-wide activity stream. Additionally, you can manage your dashboards and visit recent records from the Home page actions menu. For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



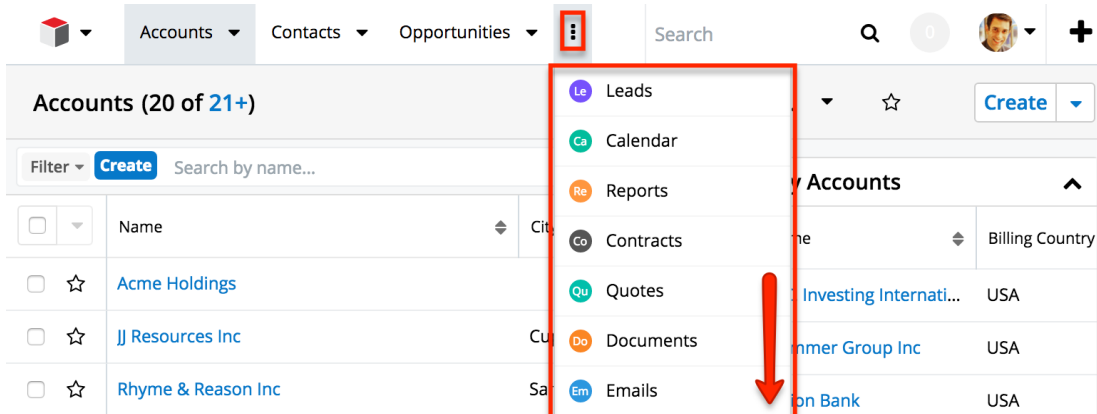
## Module Tabs

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



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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.



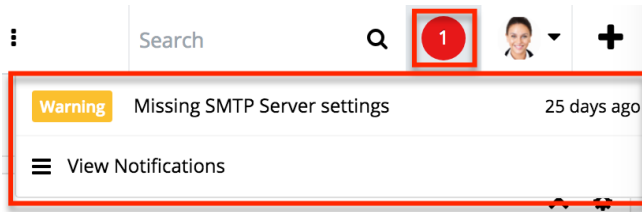
Clicking on the search bar will expand it across Sugar's navigation bar. To perform a search, type the search phrase into the search box, and the pop-up results will begin appearing once you enter at least one character. Click "View all results" at the bottom of the pop-up results to see and filter additional 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

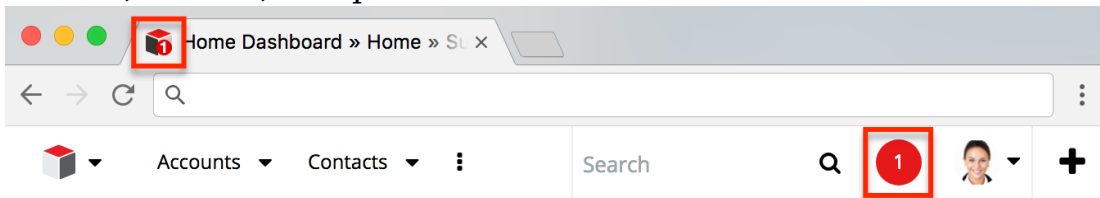
Sugar notifications relay key messages, warnings, and alerts which are relevant to the current user. The Notifications indicator is available to all users and is located on the upper right of the screen next to global search. The number displayed in the notifications box indicates the number of messages with a status of "Unread". A "0" will appear if there are no unread notifications. Clicking the number will reveal a dropdown displaying your most recent notifications. From the open Notifications dropdown, click "View Notifications" in order to see all notifications in a list view. You can also navigate directly to a single notification's record view by clicking the subject (e.g. Missing SMTP Server settings) in the dropdown.





The favicon (SugarCRM cube icon) in your browser tab will also display the count of unread notifications. Please note that the favicon notification count only appears in the tab while logged into Sugar. When the notification count changes, the favicon's count will update within 5 minutes of the change or upon reloading the browser.

Note: The favicon count can only be viewed when accessing Sugar using the Chrome, Firefox, or Opera browser.



## Notifications Severity Levels

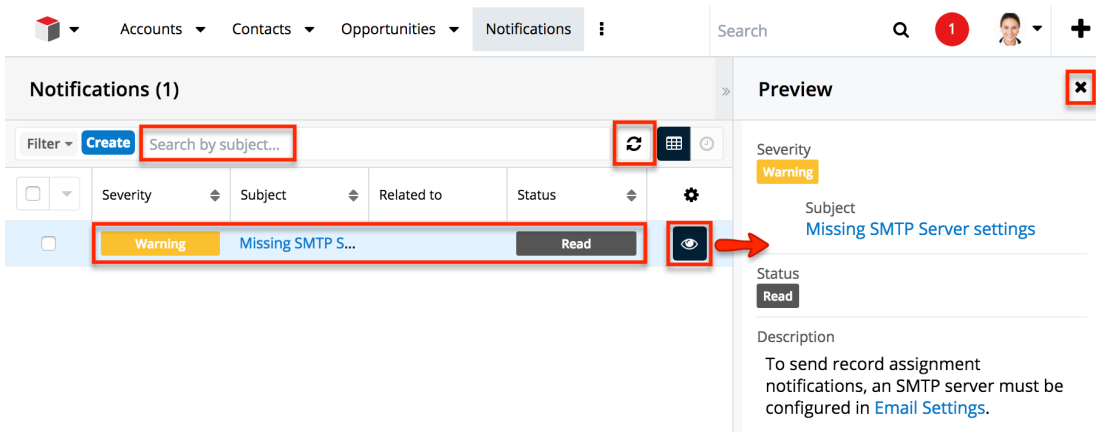
Each notification will have one of four severity levels:

- Alert (Red) : Indicates something is critically wrong with your Sugar instance and needs the attention of your Administrator immediately
- Warning (Yellow) : Indicates something in your Sugar instance needs your attention or the attention of your Sugar Administrator to remedy
- Information (Blue) : Standard notification including reminders of an upcoming meeting, call, or task
  - Note: In order 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

## Notifications List View

The Notifications list view displays all notification records meeting the current search criteria. For more information about searching for the desired records, please refer to the List View Search section. The following information and options are available from the list view:

- **Preview** : You can preview a notification's details by clicking the Preview button to the right of the notification. Close the preview by clicking the "x" at top right.
- **Refresh** : Update the current view to retrieve the latest list view results.
- **Severity** : The color-coded severity of each notification is displayed in the Severity column.
- **Status** : The Status field indicates whether or not a notification has been viewed. A notification will be automatically marked as "Read" if the record view is opened or the notification is previewed. You can also manually toggle the Status field by clicking its current value.
- **Record view** : To open a notification in record view, simply click the notification's subject.



## Notifications Record View

The Notifications record view displays the details of a specific notification. The following information and options are available from record view:

- **Links** : If a notification requires actions within the Sugar application, a link may appear in the Description field. Clicking the link will take you to the related record or the area where action is needed.
- **Severity** : The color-coded severity of each notification is displayed.
- **Status** : The Status field indicates whether or not a notification has been viewed. A notification will be automatically marked as "Read" if the record view is opened or the notification is previewed. Users may also manually toggle the Status field by clicking its current value.



Warning Missing SMTP Server set... Read View Change Log

Description

To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).

Related to

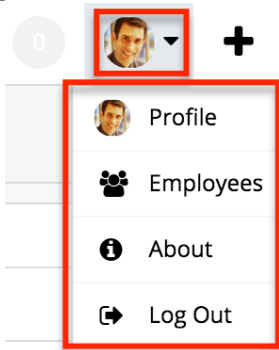
Assigned to

Administrator

[Show more...](#)

## 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.



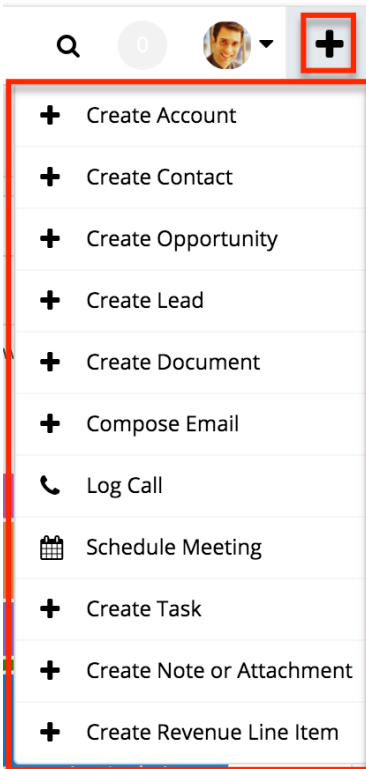
The user menu allows you to perform the following operations:

Menu Item	Description
Profile	View your user profile, change your password, and personalize various aspects of Sugar.
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. 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 edition, version, and build, as well as credits 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, please 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

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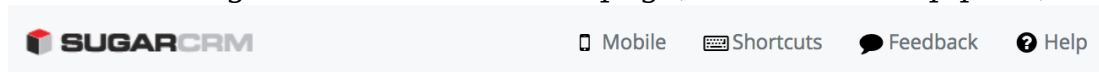
where a relationship exists between the two modules, Sugar automatically relates the new record to the one being viewed. For example, if you are viewing an account, ABC Company, and create a new contact via quick create, the Account Name field in the new contact will automatically populate with "ABC 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.



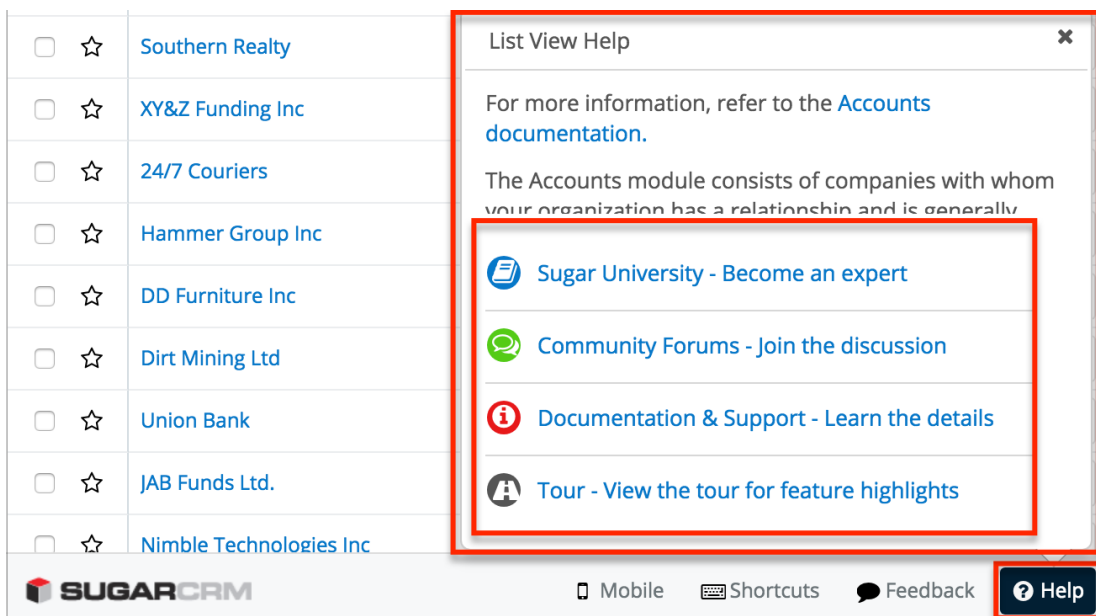
The following links are available in Sugar's footer:

- 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
- 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.



## 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.

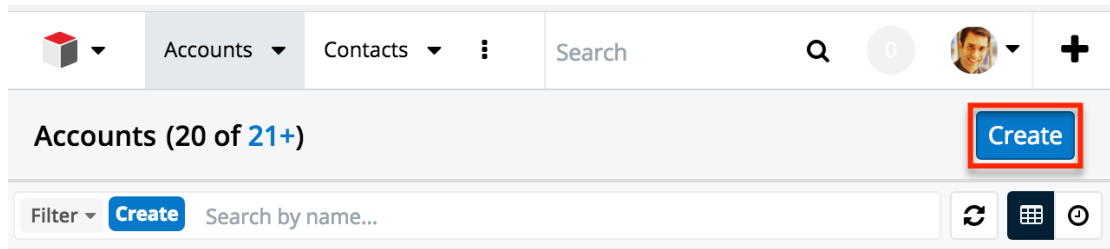
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## Basic Record Creation

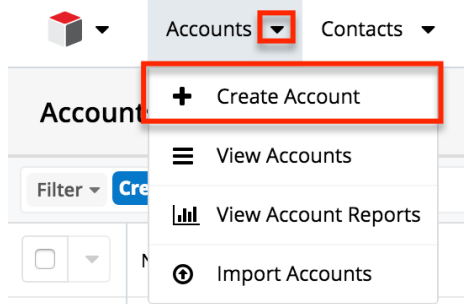
The most common method of record creation is via the individual module itself using the Create button in the list view or the Create {Module} option in the module tab. This opens the record view layout in edit mode which allows you to enter all of the desired information.

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.

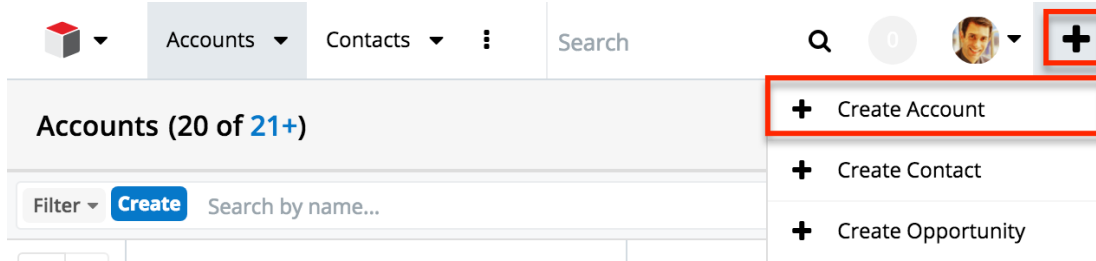
Note: Administrators have the ability to enable or disable a module in the Quick Create menu. Also, some modules are not available to be enabled. For more

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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".

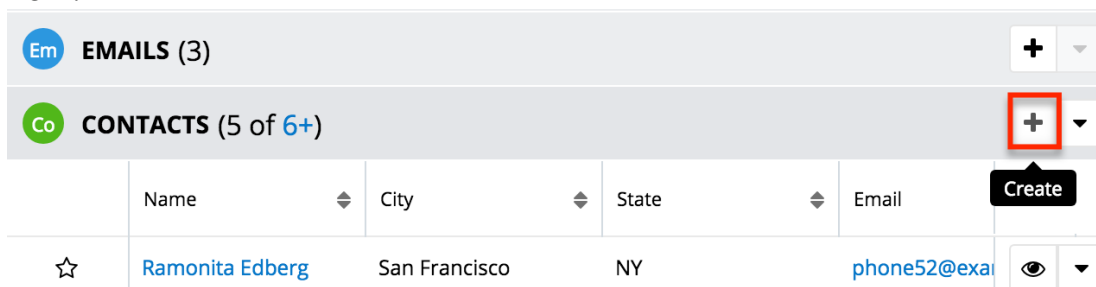
## Creating via Subpanels

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

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saving.

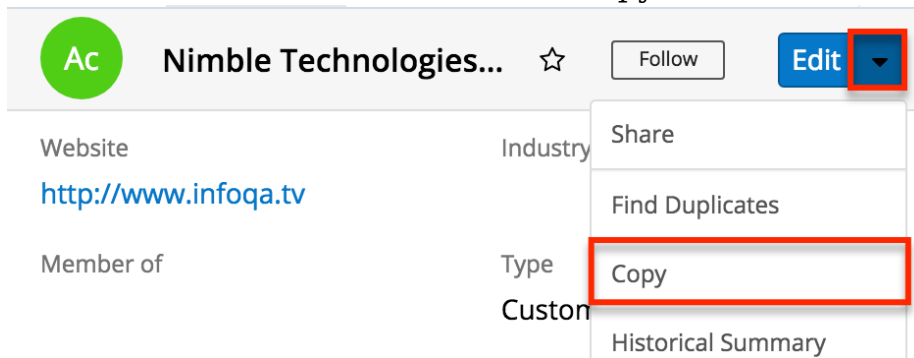
3. Once the necessary information is entered, click "Save".

## 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".

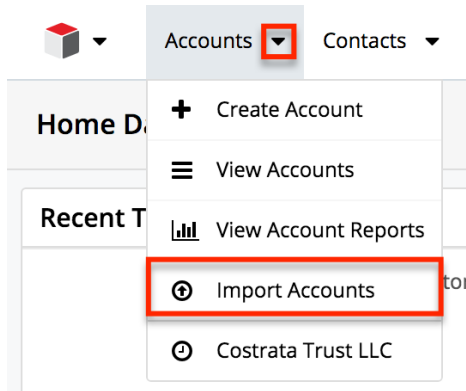
## Importing Records

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 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 location 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

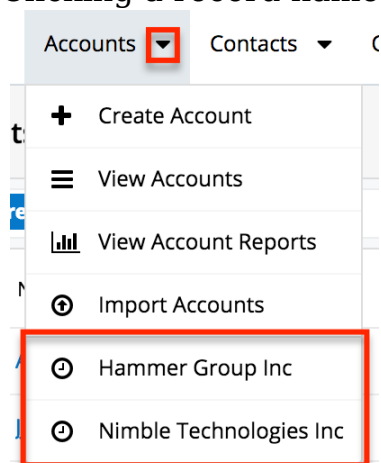
Each record's record view displays thorough record information including all relevant fields followed by subpanels of related records belonging to various modules. The record view can be reached by clicking a record's name link from

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anywhere in the application. For in-depth information about record views, please refer to the Record 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.





My Contacts		
Name	Account Name	Office Phone
Daron Langone		(559) 848-6289
Johanne Bramwell	Insight Marketing Inc	(327) 402-3565
Tierra Palin	Tracker Com LP	(508) 131-9394
Sanford Bristol	Hammer Group Inc	(563) 201-0083
Trish Basta	Hammer Group Inc	(888) 171-3184
<a href="#">More contacts...</a>		

## Viewing via Activity Streams

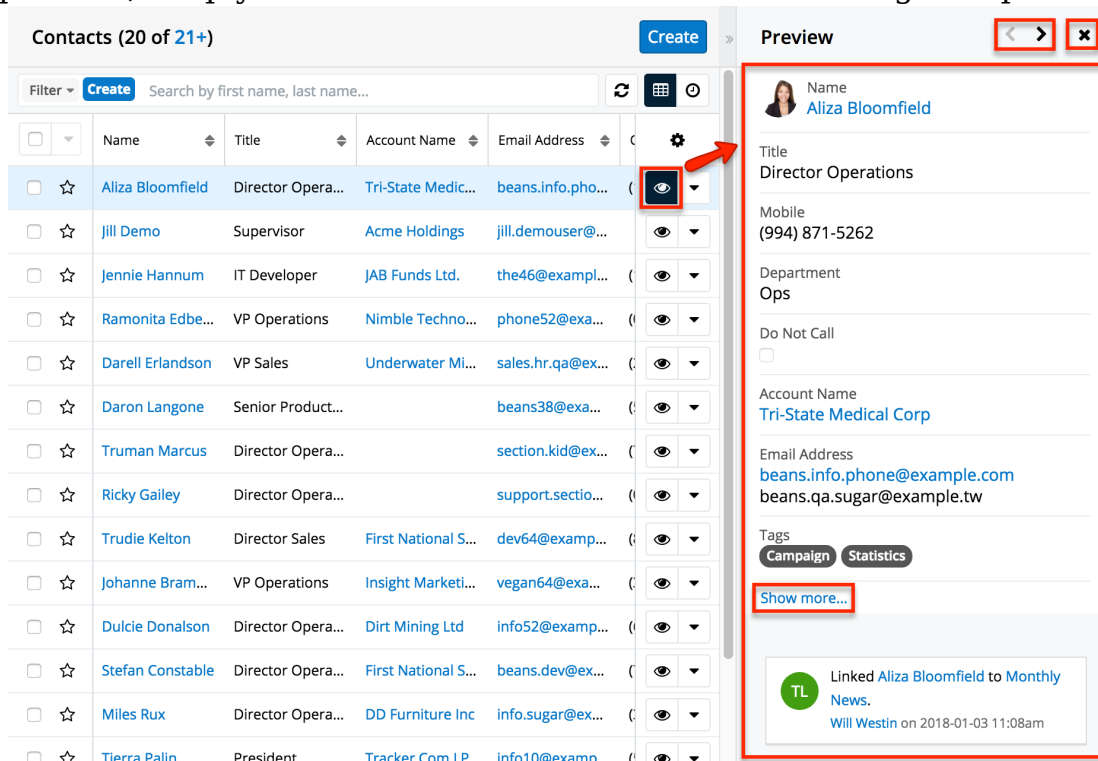
The activity stream allows you to see record changes and user posts relevant to records you are following in Sugar. Activity stream posts will display records when that record was modified or when a user mentions the record in their post. Clicking the record's name link will open its record view. You 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.

The screenshot displays the SugarCRM interface. On the left, the 'Accounts (20 of 21+)' section shows an activity stream with a post: 'Linked **Extended Support 5k** to T-Squared Techs.' The text 'Extended Support 5k' is highlighted with a red box, and a red arrow points from it to the 'Preview' button in the right-hand pane. The 'Preview' pane shows details for the 'Extended Support 5k' opportunity, including the account name 'T-Squared Techs', expected close date '2016-11-30', and financial values: Likely \$5,000.00, Best \$5,000.00, and Worst \$5,000.00. Below the preview, there are three activity items: 'Linked Extended Support 5k to T-Squared Techs.', 'Created Extended Support 5k Opportunity.', and 'Linked support to Extended Support 5k.'

## 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.



The screenshot displays a CRM interface with a list of contacts on the left and a detailed preview on the right. The list view has columns for Name, Title, Account Name, and Email Address. The preview pane for Aliza Bloomfield shows fields for Name, Title (Director Operations), Mobile (994) 871-5262, Department (Ops), Do Not Call (unchecked), Account Name (Tri-State Medical Corp), Email Address (beans.info.phone@example.com), and Tags (Campaign, Statistics). A "Show more..." link is visible at the bottom of the preview pane. A red box highlights the eye icon in the list view and the preview pane, with an arrow pointing from the eye icon to the preview pane. Another red box highlights the navigation and close buttons at the top of the preview pane.

Name	Title	Account Name	Email Address
Aliza Bloomfield	Director Opera...	Tri-State Medic...	beans.info.pho...
Jill Demo	Supervisor	Acme Holdings	jill.demouser@...
Jennie Hannum	IT Developer	JAB Funds Ltd.	the46@examp...
Ramonita Edbe...	VP Operations	Nimble Techno...	phone52@exa...
Darell Erlandson	VP Sales	Underwater Mi...	sales.hr.qa@ex...
Daron Langone	Senior Product...		beans38@exa...
Truman Marcus	Director Opera...		section.kid@ex...
Ricky Gailey	Director Opera...		support.sectio...
Trudie Kelton	Director Sales	First National S...	dev64@examp...
Johanne Bram...	VP Operations	Insight Marketi...	vegan64@exa...
Dulcie Donalson	Director Opera...	Dirt Mining Ltd	info52@examp...
Stefan Constable	Director Opera...	First National S...	beans.dev@ex...
Miles Rux	Director Opera...	DD Furniture Inc	info.sugar@ex...
Tierra Palin	President	Tracker Com LP	info10@examp...

## 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

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columns. For more information on using reports, please refer to the Reports documentation.

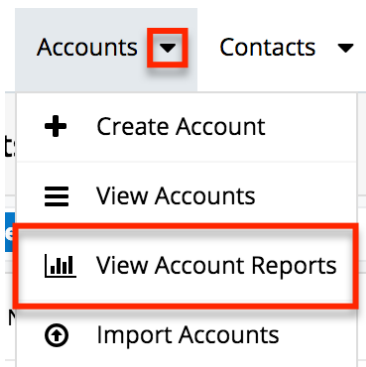
**Name:** Accounts Report  
**Modules:** Accounts, Accounts > Email Address  
**Display Columns:** Name, Email Address  
**Schedule:** None  
**Filters:** None

**Type:** Rows and Columns Report  
**Teams:** Global  
**Assigned to:** Administrators

(1 - 53 of 53)

Name	Email Address
ABC Company	abc@example.com
Evermore Company	evermore@example.com

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.

---

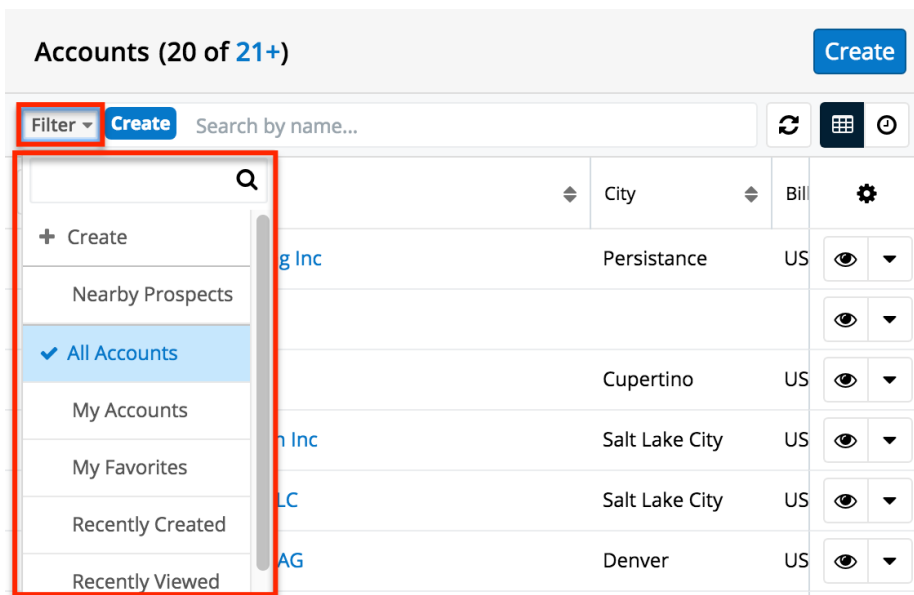
## Global Search

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 the different methods, please refer to the Search documentation.

## List View Search

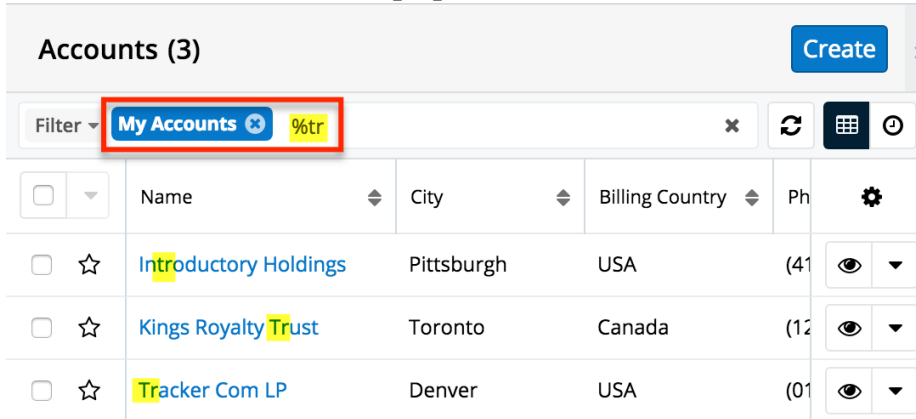
List view search enables users to easily search by the record's name within an individual module and pull up matching records in the list view. The search also provides a Filter option allowing you to narrow your search further using the available options as follows:

- 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

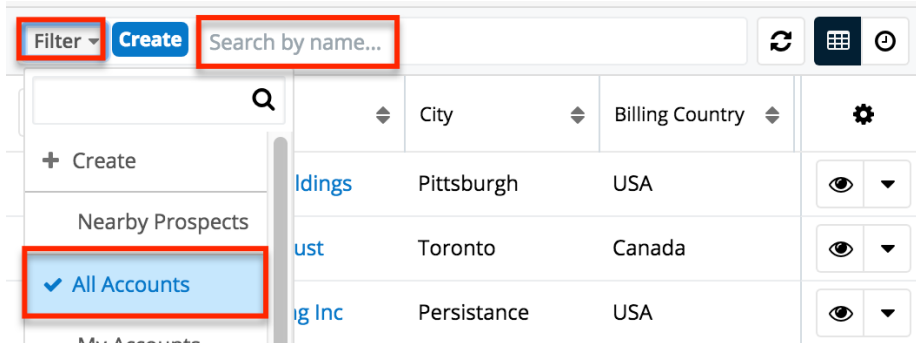
filter and any name provided in the open Search box in the filtered list view results. For example, if you select "My Accounts" in the Filter options and enter a query in the Search box, Sugar will only return account records that are assigned to you and have names that match the search term. Once the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



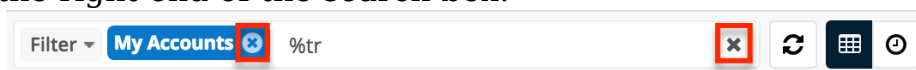
Note: The yellow highlighting in this image has been added for effect and will not appear in the application.

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:

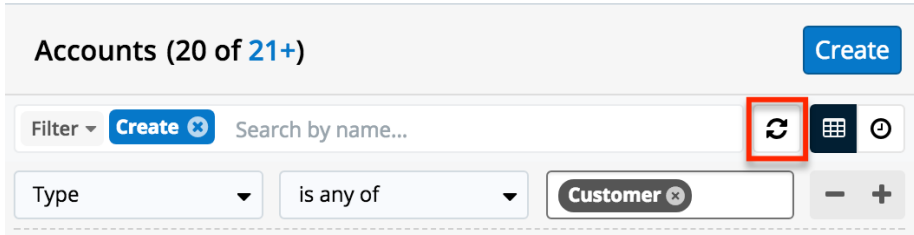


To clear an applied filter, click the "x" on the selected filter option (e.g. My Accounts) in the Search box; to clear a text query from the search, click the "x" on the right end of the search box:



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.

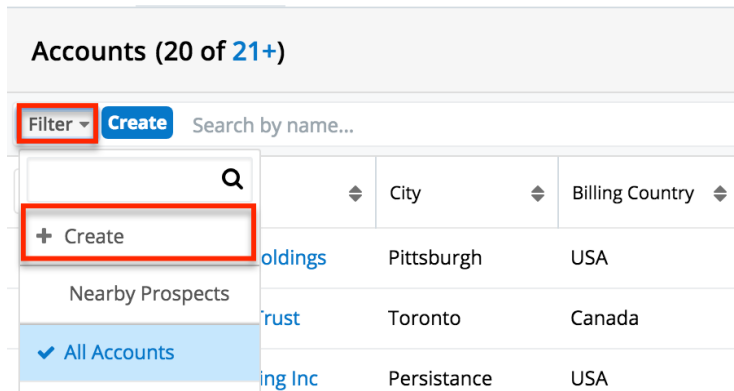
When you run a search using a created filter, the search will be preserved when you navigate away from the module. Returning to the list view will automatically display the results of your last filter.

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

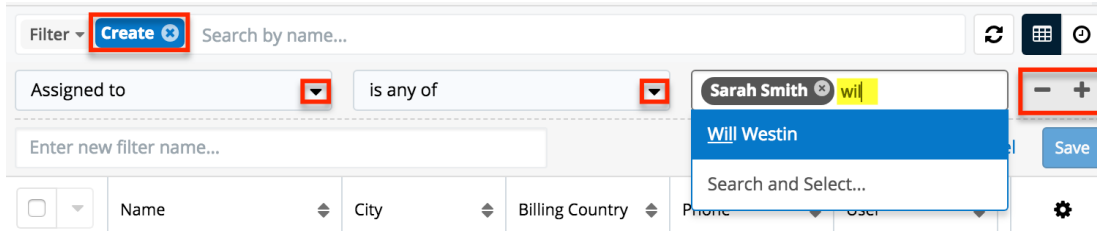
1. Click the Filter option on the Accounts search bar then select "Create".







- 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.

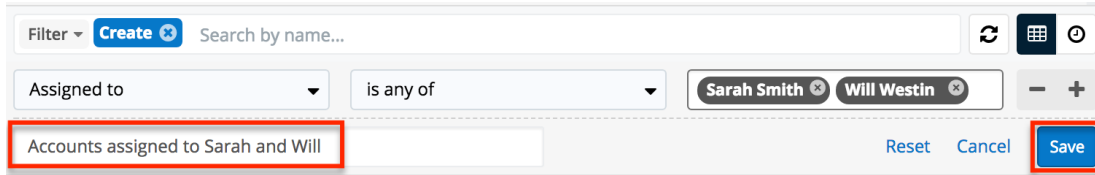
Note: When filtering a relate field using "is any of" or "is not any of", you can select up to 20 values.

### 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").



The screenshot shows a filter creation interface. At the top, there is a 'Filter' dropdown, a 'Create' button with a plus icon, and a search bar labeled 'Search by name...'. Below this, there are two dropdown menus: 'Assigned to' and 'is any of'. The 'Assigned to' dropdown is set to 'Assigned to' and the 'is any of' dropdown is set to 'is any of'. Below these dropdowns, there are two input fields containing the names 'Sarah Smith' and 'Will Westin'. To the right of these input fields are minus and plus icons. Below the input fields, there is a text input field containing the filter name 'Accounts assigned to Sarah and Will'. To the right of this text input field are 'Reset', 'Cancel', and 'Save' buttons. The 'Save' button is highlighted with a red box.

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.



Accounts (20 of 21+) Create

Filter Create Search by name...

<input type="checkbox"/>	Name	City	Billing Country	Phone	User	Settings
<input type="checkbox"/> ☆	<a href="#">Introductory Holdings</a>	Pittsburgh	USA	(412) 123-9876	<a href="#">Will Westin</a>	<input type="checkbox"/> ▼
<input type="checkbox"/> ★	<a href="#">Kings Royalty Trust</a>	Toronto	Canada	(123) 456-1234	<a href="#">Will Westin</a>	<input type="checkbox"/> ▼

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.

Accounts (20 of 21+) Create Search by name...

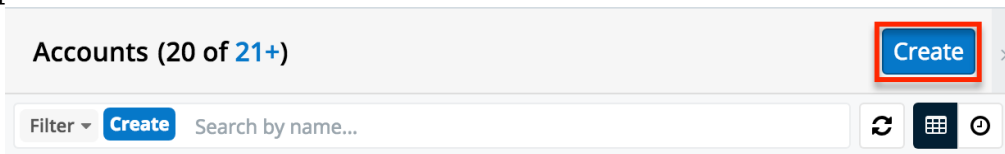
Please note that, by default, Sugar displays 20 records per list view results set, but administrators can change the number of records displayed via Admin > System Settings. For more information, please refer to the System documentation.

## 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,

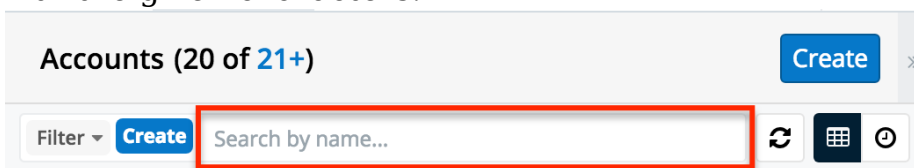
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please refer to the Studio documentation.



## List View Search

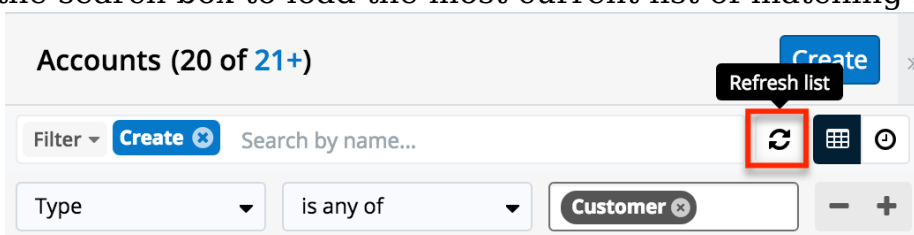
To search for a specific record within a module or for a list of module records filtered by name, use the search bar located above any module's list view. Start typing a word into list view search and Sugar will retrieve all records that start with the given characters.



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

## 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.



<input type="checkbox"/>	Name	City	Billing Country	Ph	
<input checked="" type="checkbox"/>	Introductory Holdings	Pittsburgh	USA	(41	
<input type="checkbox"/>	Kings Royalty Trust	Toronto	Canada	(12	
<input checked="" type="checkbox"/>	Insight Marketing Inc	Persistence	USA	(95	

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.

<input checked="" type="checkbox"/>	Name	City	Billing Country	Ph	
You have selected all 20 records in this view <a href="#">Select all records</a> in the result set.					
<input checked="" type="checkbox"/>	Introductory Holdings	Pittsburgh	USA	(41	
<input checked="" type="checkbox"/>	Kings Royalty Trust	Toronto	Canada	(12	

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 check marks.

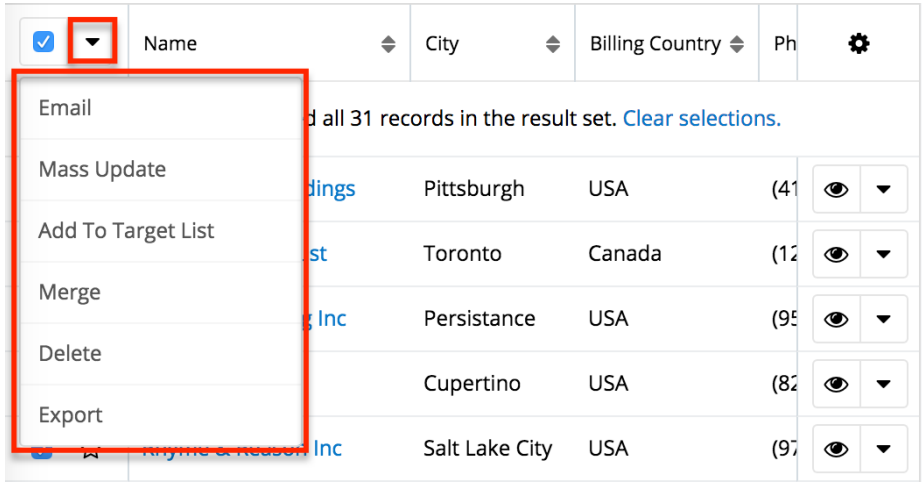
<input checked="" type="checkbox"/>	Name	City	Billing Country	Ph	
You have selected all 31 records in the result set <a href="#">Clear selections.</a>					
<input checked="" type="checkbox"/>	Introductory Holdings	Pittsburgh	USA	(41	
<input checked="" type="checkbox"/>	Kings Royalty Trust	Toronto	Canada	(12	

## 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.

<input type="checkbox"/>	☆	Introductory Holdings	Pittsburgh
<input type="checkbox"/>	★	Kings Royalty Trust	Toronto
<input type="checkbox"/>	Favorite	Insight Marketing Inc	Persistence

## 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.

<input type="checkbox"/>	Name	Phone	Billing Country	
<input type="checkbox"/>	★ Kings Royalty Trust	Toronto	Canada	(123) 456-1234

## 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 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.

<input type="checkbox"/>	Name	Phone	City	Billing Country	
<input type="checkbox"/> ★	<a href="#">Kings Royalty Trust</a>	(123) 456-1234	Toronto	Canada	▼
<input type="checkbox"/> ☆	<a href="#">JAB Funds Ltd.</a>	(366) 842-4996	St. Petersbu...	USA	▼

## 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.

<input type="checkbox"/>	Name	Phone	City	Billing Country	
<input type="checkbox"/> ★	<a href="#">Kings Royalty Trust</a>	(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.











<input type="checkbox"/>	Name	Phone	City	Billing Country	
<input type="checkbox"/> ★	Kings Royalty Trust	(123) 456-1234	Toronto		<ul style="list-style-type: none"> <li>✓ Name</li> <li>✓ Phone</li> <li>✓ City</li> <li>✓ Billing Country</li> <li>✓ User</li> <li>✓ Email Address</li> <li>✓ Date Modified</li> <li>✓ Date Created</li> </ul>
<input type="checkbox"/> ☆	JAB Funds Ltd.	(366) 842-4996	St. Petersburg		
<input type="checkbox"/> ☆	Cloud Cover Trust	(598) 722-5289	St. Petersburg		
<input type="checkbox"/> ☆	Nimble Technologies Inc	(182) 329-3369	Santa Fe		
<input type="checkbox"/> ☆	Spindle Broadcast Corp.	(510) 946-3705	Santa Fe		
<input type="checkbox"/> ☆	Aim Capital Inc	(506) 505-8650	Santa Fe		
<input type="checkbox"/> ☆	24/7 Couriers	(382) 239-7069	San Mateo		
<input type="checkbox"/> ☆	Tri-State Medical Corp	(171) 906-5479	San Jose		

## 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.

**Contacts (20 of 21+)** Create

Filter Create Search by first name, last name...

<input type="checkbox"/>	Name	Title	Account Name	Email Address		
<input type="checkbox"/> ☆	Aliza Bloomfield	Director Opera...	Tri-State Medic...	beans.info.pho...		
<input type="checkbox"/> ☆	Jill Demo	Supervisor		jill.demouser@...		
<input type="checkbox"/> ☆	Jennie Hannum	IT Developer	JAB Funds Ltd.	the46@exampl...		

**Preview** < > ✕



Name  
**Aliza Bloomfield**

---

Title  
Director Operations

---

Mobile  
(994) 871-5262

---

Department  
Ops

## 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".



<input type="checkbox"/>	☆	Daryl Leaman	New	Overhead & U...	(661) 675-8591	s		▼
<input type="checkbox"/>	☆	Sherrill Pfeil	Recycled	Underwater Mi...	(39			Edit
<input type="checkbox"/>	☆	Veta Puryear	Assigned	White Cross Co	(4			Follow
<input type="checkbox"/>	☆	Marge Heeter	Assigned	RR. Talker Co	(66			Delete
<input type="checkbox"/>	☆	Soon Basler	New	Dirt Mining Ltd	(19			Convert

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.

<input type="checkbox"/>	☆	Smith & Sons	(550) 176-4995	Los Angeles	USA	Max Je		▼
<input type="checkbox"/>	☆	XY&Z Funding Inc	(974) 319-4045	Kansas City	USA	Chris C		▼
<input type="checkbox"/>	☆	Chandler Logistics Inc	(575) 569-7545	Kansas City	USA	Jim Br		▼

[More accounts...](#)

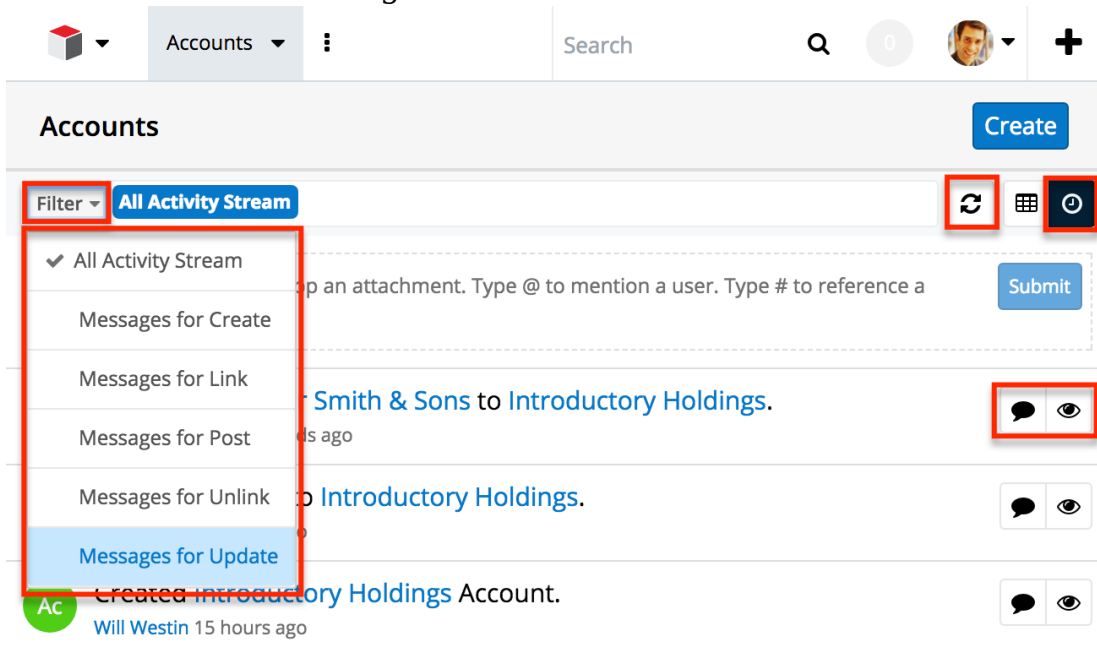
Mobile Shortcuts Feedback Help

## 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.

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 the 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.





Accounts List Dashboard

Name	Billing Country	City
<a href="#">Introductory Holdings</a>	USA	Pittsburgh
<a href="#">Kings Royalty Trust</a>	Canada	Toronto
<a href="#">Insight Marketing Inc</a>	USA	Persistence
<a href="#">B.C. Investing Internati...</a>	USA	Persistence
<a href="#">Hammer Group Inc</a>	USA	Alabama
<a href="#">More accounts...</a>		

## 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.

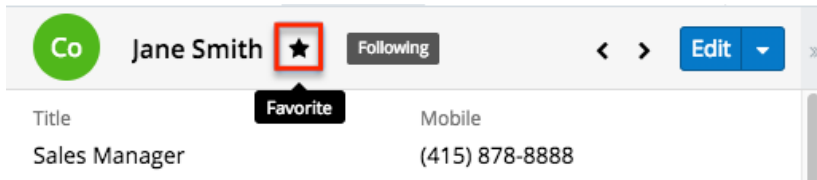
Co Jane Smith [Follow](#) [Edit](#)

Title	Mobile
Sales Manager	(415) 878-8888
Department	Do Not Call
Sales	<input type="checkbox"/>
Account Name	Email Address
<a href="#">Smith &amp; Sons</a>	<a href="mailto:jane@example.com">jane@example.com</a>

---

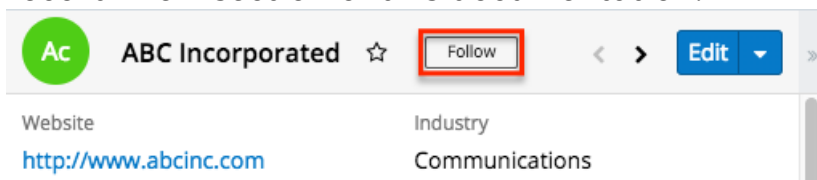
## Favorite Designation

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.



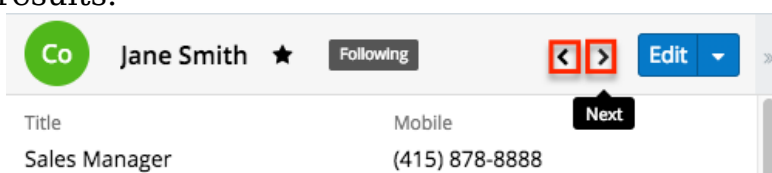
## Following Designation

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 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

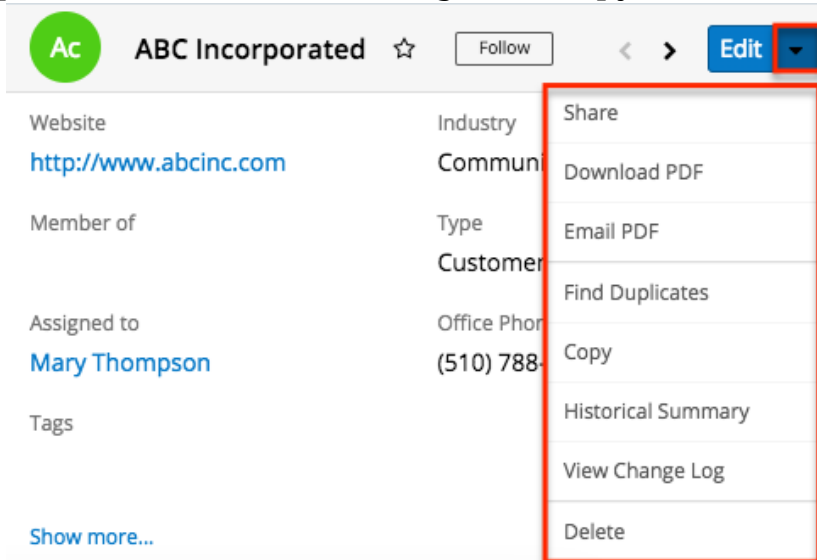
On the upper right of the record view, there are two buttons that allow you to page through each record in the module's list view's current search results. Clicking the Left arrow button displays the previous record of the current search results while clicking the Right arrow button displays the next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



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## 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 Change Log	View a sequence of changes made to this record
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.

The screenshot shows a business card record view for 'ABC Incorporated'. At the top, there is a header with a green circular icon containing 'Ac', the company name 'ABC Incorporated', a star icon, a 'Follow' button, navigation arrows, and an 'Edit' button with a dropdown arrow. Below the header, the record is displayed in a grid-like format with the following fields:

Website	Industry
<a href="http://www.abcinc.com">http://www.abcinc.com</a>	Communications
Member of	Type
	Customer
Assigned to	Office Phone
<a href="#">Mary Thompson</a>	(510) 788-8788
Tags	

At the bottom left of the record view, there is a red-bordered button labeled 'Show more...'.

## 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.



Show more...

Data View

Related ▾ All Filter All Records Search...

CALLS (5 of 6+) + ▾

CONTACTS (2) + ▾

	Name	City	State	Email	
☆	<a href="#">Johanne Bramwell</a>	New York	NY	<a href="mailto:johanne.b@example.net">johanne.b@example.net</a>	👁️ ▾
☆	<a href="#">Lindsay Smith</a>	San Francisco	CA	<a href="mailto:lindsay@example.com">lindsay@example.com</a>	👁️ ▾

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

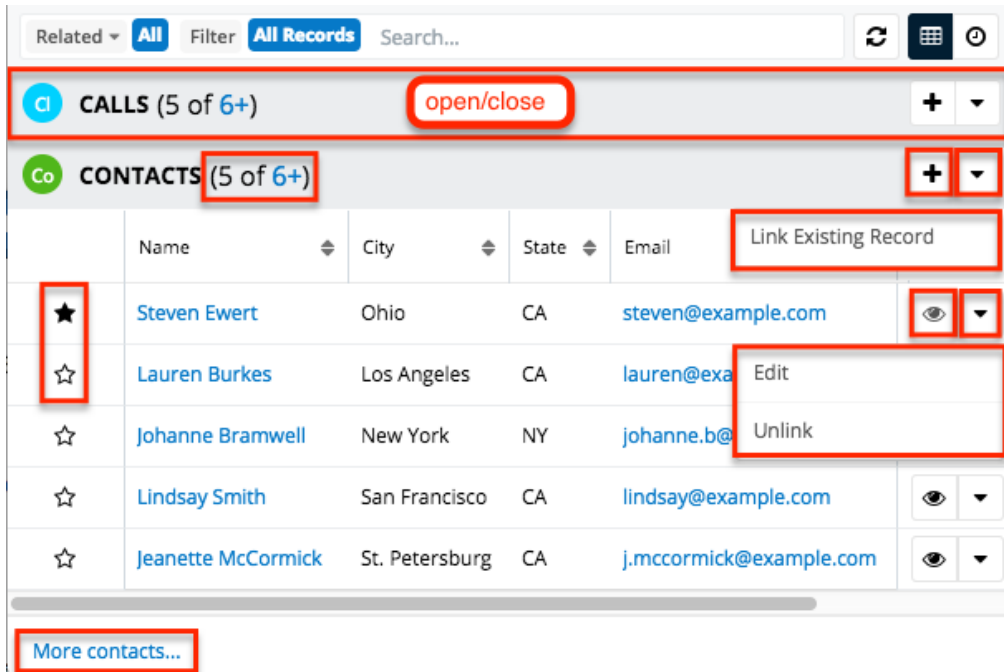
Subpanels under a module's record view contain its related records. Each relationship between two modules has a type, and that type determines if the relationship produces a field or a subpanel for each side. When a record of the primary module can be related to only one record of a second module (i.e. 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:







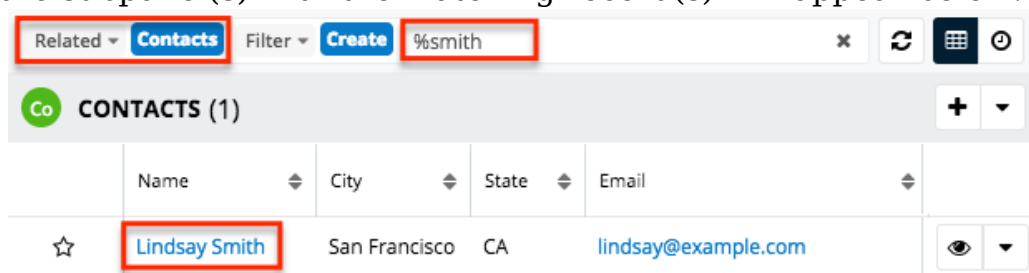
- Record Count : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more records than currently displayed. Click the hyperlinked 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 which 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

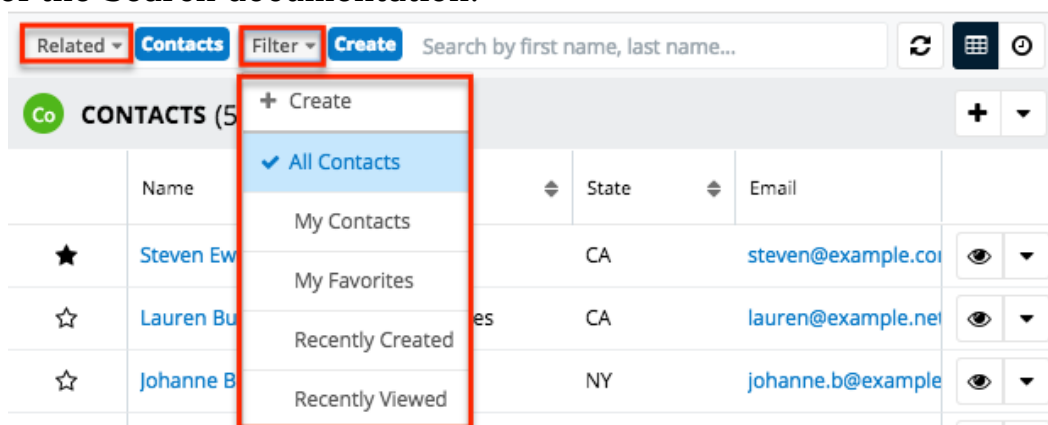
While in Data View, all of the related records will be displayed beneath the record's fields. Users have the ability to search for records which appear in the

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

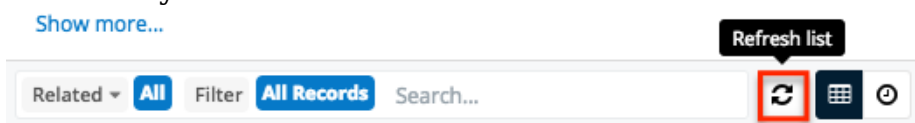
Users can easily move subpanels to a new location on the record view by dragging and dropping the subpanel's header. The new subpanel order will remain for a

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user upon subsequent visits to the module until the user's browser cache is cleared.

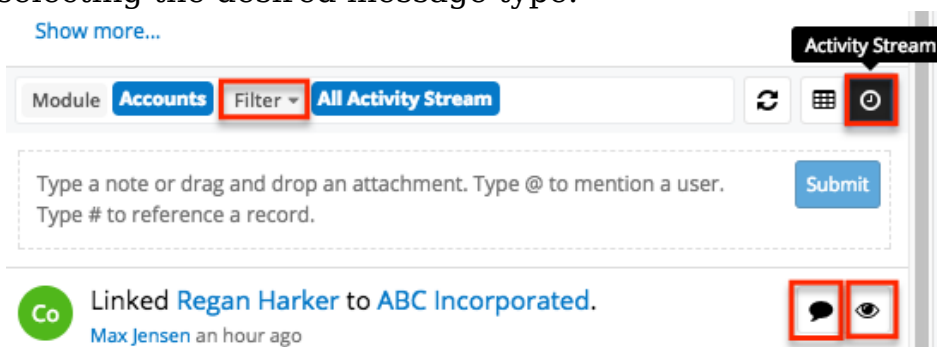
## Refreshing Subpanels

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 in 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.



## 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.

The screenshot shows a record view for 'ABC Incorporated' with an 'Accounts Record Dashboard' widget. The dashboard features an 'Opportunity Metrics' donut chart with a central value of 40. The chart is divided into three segments: Active (blue, 35), Won (green, 4), and Lost (red, 1). Below the chart, three summary cards display: 4 Won (\$127,705), 1 Lost (\$0), and 35 Active (\$1,744,410). The record details on the left include website, industry, type, customer status, office phone, shipping address, email address, and campaign information.

## 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.

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## 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.

**Note:** 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 allow 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.




Accounts (20 of 21+) Create

Filter Create Search by name...

<input type="checkbox"/>	Name	City	Billing Country	Phone	
<input type="checkbox"/>	★ ABC Incorporated	San Francisco	USA	(510) 788-8788	
<input type="checkbox"/>	★ XY&Z Funding Inc	Kansas City	USA	(415) 226-8888	
<input type="checkbox"/>	★ Smith & Sons	Los Angeles	USA	(550) 176-4995	
<input type="checkbox"/>	★ John Smith and Company	San Francisco	USA	(415) 812-7892	
<input type="checkbox"/>	☆ ABC Company	San Francisco	USA	(415) 226-8888	
<input type="checkbox"/>	☆ J.K.M. Corp (HA)	Kansas City	USA	(375) 275-8268	
<input type="checkbox"/>	☆ Jungle Systems Inc	San Jose	USA	(374) 315-6162	
<input type="checkbox"/>	☆ AtoZ Co Ltd	San Francisco	USA	(415) 728-8000	
<input type="checkbox"/>	☆ Air Safety Inc	St. Petersburg	USA	(077) 541-3937	
<input type="checkbox"/>	☆ JJ Resources Inc	Cupertino	USA	(825) 133-2353	
<input type="checkbox"/>	☆ 24/7 Couriers	San Mateo	USA	(382) 239-7069	
<input type="checkbox"/>	☆ Powder Suppliers	Alabama	USA	(220) 464-3066	

**Preview** < > ×

 Name  
ABC Incorporated

Website  
<http://www.abcinc.com>

Industry  
Communications

Member of


Type  
Customer

Assigned to  
[Mary Thompson](#)

Office Phone  
(510) 788-8788

Tags

[Show more...](#)

 Linked [Regan Harker](#) to [ABC Incorporated](#).  
Max Jensen an hour ago

### 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.





The screenshot displays a CRM interface with a record for 'ABC Incorporated' and a preview for 'Johanne Bramwell'. The record view on the left shows fields like Website, Industry, Member of, Assigned to, and Tags. Below this is a table of related contacts. A red arrow points from the eye icon in the 'CONTACTS' table row for 'Johanne Bramwell' to the preview pane on the right. The preview pane shows details for 'Johanne Bramwell', including Title (Operations Manager), Mobile phone number, Department (Operations), Account Name (ABC Incorporated), and Email Address (johanne.b@example.net).

Name	City	State
Jeanette McCormick	St. Petersburg	CA
Johanne Bramwell	New York	NY
Lauren Burkes	Los Angeles	CA
Lindsay Smith	San Francisco	CA

### 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.

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



The screenshot displays a CRM interface with two main sections: 'Accounts (20 of 21+)' and 'Preview'.

**Accounts (20 of 21+)**

- Filter: All Activity Stream
- Buttons: Create, Refresh, Grid, Preview (highlighted with a red box and arrow)
- Text: Type a note or drag and drop an attachment. Type @ to mention a user. Type # to reference a record. Submit

**Activity Stream:**

- Ac** Updated Office Phone on ABC Incorporated. Max Jensen a few seconds ago
- Co** Linked Cornelius Cartier to 24/7 Couriers. Max Jensen a minute ago
- Ac** Updated Office Phone on Air Safety Inc. Max Jensen 2 minutes ago
- Co** Linked Karly Shealey to JJ Resources Inc. Max Jensen 2 minutes ago
- Ac** Created DBA Inc. Account. Max Jensen 6 minutes ago
- Co** Linked Muriel Ormond to XY&Z Funding Inc. Max Jensen 7 minutes ago
- Ac** Updated Office Phone on ABC Incorporated. Max Jensen 7 minutes ago
- Ac** Updated Assigned User on Smith & Sons. Mary Thompson on 01/04/2018 12:20pm

**Preview Pane:**

- Name: ABC Incorporated
- Website: <http://www.abcinc.com>
- Industry: Communications
- Member of:
- Type: Customer
- Assigned to: Mary Thompson
- Office Phone: (510) 788-8788
- Tags:
- Show more...

**Preview Summary:**

- Ac** Updated Office Phone on ABC Incorporated. Max Jensen a few seconds ago

### 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.



Search Results for: "smith" (14)

<b>Co</b> Tony Smith Primary Email: t.smith@example.com	
<b>Le</b> Sarah Smith Primary Email: sarah.smith@example.com	
<b>Co</b> Jane Smith Primary Email: jane@example.com	
<b>Co</b> Lindsay Smith Primary Email: lindsay@example.com	
<b>Ac</b> Smith & Sons Email Address: qa.sugar@example.co.uk , Office Phone: (550) 176-4...	
<b>Ac</b> John Smith and Company Office Phone: (415) 812-7892	
<b>Ts</b> Send signed contract to John Smith Status: In Progress, Due Date: 01/05/2018 10:00am	
<b>Co</b> John Smithson	
<b>Co</b> John Moore Alternate Address Street: 123 Smith St, Primary Address Street: 123 ...	

Preview

**Co** Name  
Jane Smith

Title  
Sales Manager

Mobile  
(415) 878-8888

Department  
Sales

Do Not Call

Account Name  
Smith & Sons

Email Address  
jane@example.com

Tags

[Show more...](#)

**Ac** Linked Jane Smith to Smith & Sons.  
Mary Thompson  
on 01/04/2018 11:59am

## 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.



---

**Preview** < > x

**Co** Name  
**Jane Smith**

---

Title  
**Sales Manager**

---

Mobile  
**(415) 878-8888**

---

Department  
**Sales**

---

Do Not Call

---

Account Name  
**Smith & Sons**

---

Email Address  
**jane@example.com**

---

Tags

---

[Show more...](#)

### 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.





**Preview** < > x

**Ac** Name  
ABC Incorporated

---

Website  
<http://www.abcinc.com>

---

Industry  
Communications

---

Member of

---

Type  
Customer

---

Assigned to  
[Mary Thompson](#)

---

Office Phone  
(510) 788-8788


---

Tags

---

[Show more...](#)

---

 **Max Jensen** Please provide update on renewal meeting with **John Moore** on [ABC Incorporated](#).  
[Mary Thompson](#) a few seconds ago

---

**Ac** Updated [Office Phone](#) on [ABC Incorporated](#).  
[Max Jensen](#) 12 minutes ago

## 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.

**Preview** < > x

**Ac** Name  
ABC Incorporated

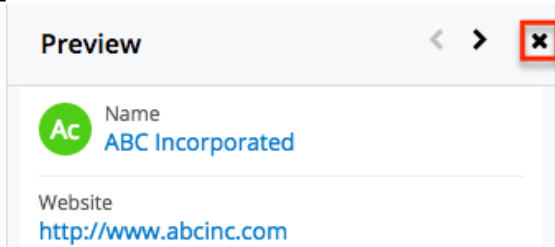
---

Website  
<http://www.abcinc.com>

---

## 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.



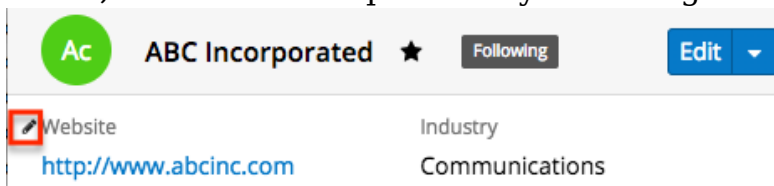
## Editing Records

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

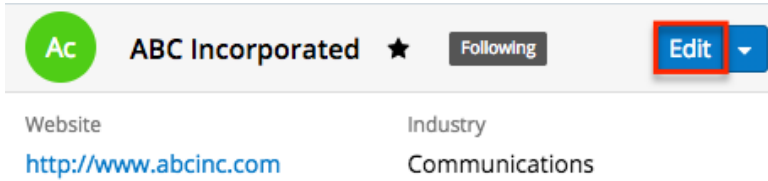
Users can edit individual fields in a record view without entering the full edit mode by clicking the field name. Fields which are available for inline editing will display a pencil icon when hovering on the field name or value. After entering your desired values, click "Save" to preserve your changes 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.




 ABC Incorporated ★ Following **Edit**

Website: <http://www.abcinc.com>

Industry: Communications

## 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".

CONTACTS (5 of 6+)					
	Name	City	State	Email	
★	Lindsay Smith	San Francisco	CA	<a href="mailto:lindsay@example.com">lindsay@example.com</a>	
☆	Jeanette McCormick	St. Petersburg	CA	<a href="mailto:j.mccormick@example.com">j.mccormick@example.com</a>	<b>Edit</b>
★	Johanne Bramwell	New York	NY	<a href="mailto:johanne@example.com">johanne@example.com</a>	Unlink

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".

	Name	City	Billing Country	Phone	
<input type="checkbox"/> ★	Nelson Inc	Alabama	USA	(980) 5...	
<input type="checkbox"/> ☆	T-Cat Media Group Inc	Los Angeles	USA		<b>Edit</b>
<input type="checkbox"/> ☆	NW Bridge Construction	Los Angeles	USA		Unfollow
<input type="checkbox"/> ☆	Q.R.&E. Corp	Sunnyvale	USA		Delete

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

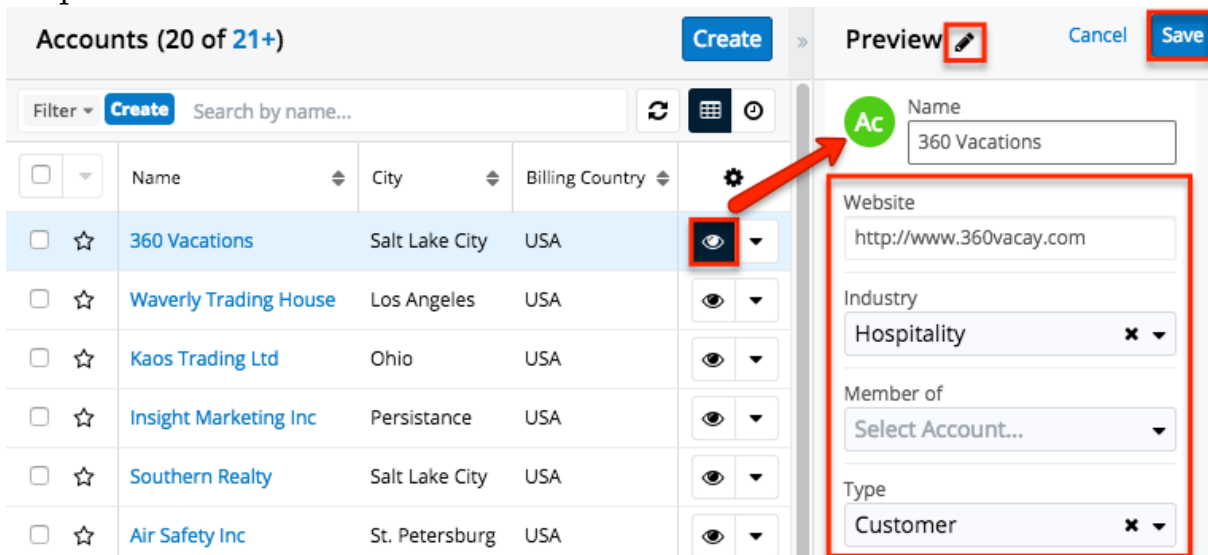
page to expand the list view's width to make editing easier. Click "Save" to preserve your changes. After saving, please refresh the page to have any list view filters be applied to the new record's values.

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. An administrator must first enable the feature via Admin > System Settings as described in the System documentation.

Navigate to a module's list view and click the eye icon 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 screenshot shows a list view titled "Accounts (20 of 21+)". The list contains several records, with "360 Vacations" selected. A red box highlights the eye icon in the rightmost column of the selected row. A red arrow points from this icon to the "Preview" header of a side panel on the right. The "Preview" panel has a pencil icon and a "Save" button. The preview form for "360 Vacations" includes fields for Name, Website, Industry, Member of, and Type. A red box highlights the entire preview form area.

Name	City	Billing Country
360 Vacations	Salt Lake City	USA
Waverly Trading House	Los Angeles	USA
Kaos Trading Ltd	Ohio	USA
Insight Marketing Inc	Persistence	USA
Southern Realty	Salt Lake City	USA
Air Safety Inc	St. Petersburg	USA

Preview details for 360 Vacations:

- Name: 360 Vacations
- Website: http://www.360vacay.com
- Industry: Hospitality
- Member of: Select Account...
- Type: Customer

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

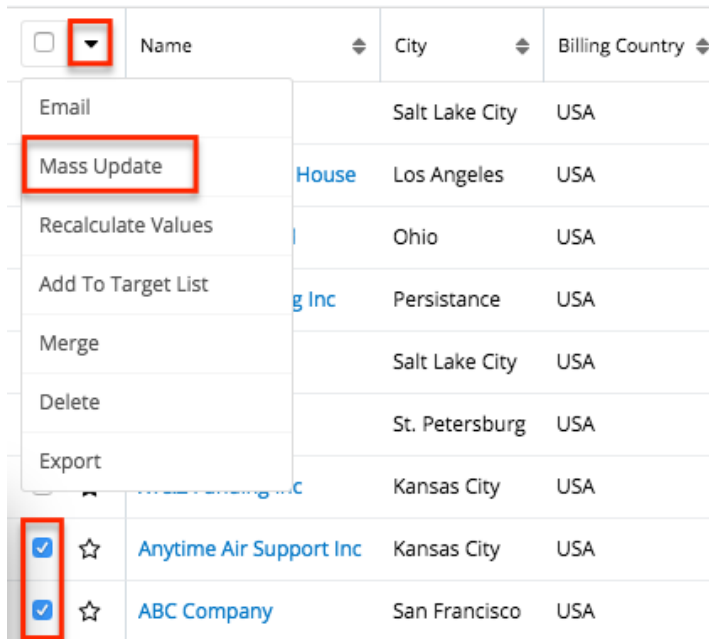
Mass Updating allows you to apply the same changes to multiple records at once. Administrator users or users with developer-type role access can control which fields are available during mass update via Admin > Studio. Fields with the data type of date, datetime, dropdown, multiselect, radio, relate, 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

Please note that your ability to mass update may be restricted by a role. For more

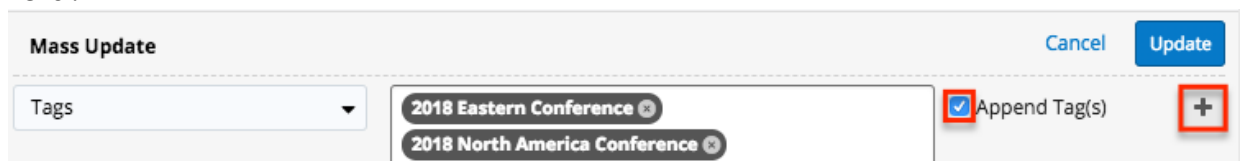
information on roles, please refer to the Role Management documentation. Check with your system administrator if you do not see the Mass Update option.

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.

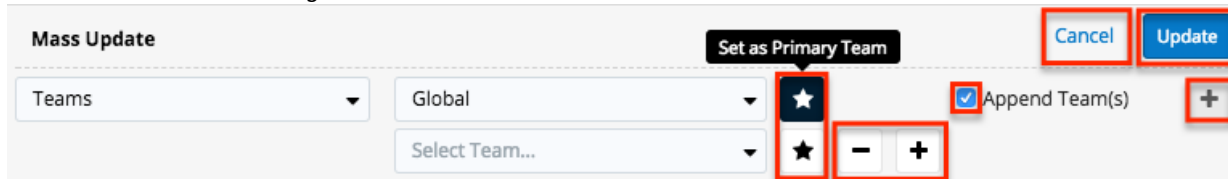


- These additional options appear when mass updating the Teams field:
  - Set as Primary Team : Use the star icons to specify which team, if any, should be set as the primary team on the updated records. A

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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.

A screenshot of the 'Mass Update' interface. It features a 'Teams' dropdown menu, a 'Global' dropdown menu, and a 'Select Team...' dropdown menu. To the right of the 'Global' dropdown is a 'Set as Primary Team' button with a star icon. Further right is a checkbox labeled 'Append Team(s)' which is checked. At the bottom right, there are minus and plus icons for team selection. On the far right, there are 'Cancel' and 'Update' buttons. Red boxes highlight the star icon, the minus and plus icons, and the 'Update' button.

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.

## Editing Fields

Sugar records include a variety of field types which enable you to capture all of the different kinds of data which 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 below:

- Text : 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.

Department

Sales

- Text Area : 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.



Description

Collaboratively administrate empowered markets via plug-and-play networks. Dynamically procrastinate B2C users after installed base benefits. Dramatically visualize customer directed convergence without revolutionary ROI.

Efficiently unleash cross-media information without cross-media value. Quickly maximize timely deliverables for real-time schemas. Dramatically maintain clicks-and-mortar solutions without functional solutions.



- **Integer** : 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

- **Dropdown** : 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.

Industry

Select...

Apparel

Banking

Biotechnology

Chemicals

Communications

Construction

Consulting

- **Multiselect** : 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.

Contact Preference

Office Phone x Email x

Mobile Phone

Alternate Phone

- **Radio** : 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.

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## Number of Employees

- 1-100
- 101-200
- 201-300

- **Checkbox** : 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.

Do Not Call



- **Date** : 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.



Cancellation Date

mm/dd/yyyy

January 2018						
Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

- **Datetime** : 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.

Start Date

01/10/2018  03:30pm 

Location

Description

- 03:15pm
- 03:30pm
- 03:45pm
- 04:00pm
- 04:15pm
- 04:30pm

- **Relate** : 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...

- **Flex Relate** : 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.

Related To

Account ABC Company

Account

Contact

Opportunity

Task

Product Catalog

Quote

Quoted Line It...

- **Email Address** : 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 email** : Add additional email address fields by clicking the plus button. Click the minus button to remove the adjacent address.

Email Address

johanne.b@example.com

Add email

- **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.



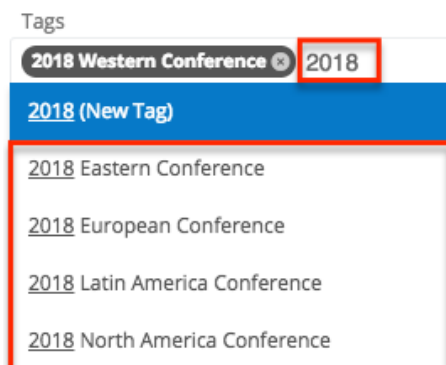
- **Opted Out** : The button with a slashed circle indicates whether or not an email address has been opted out from email marketing campaigns. Sugar automatically enables the corresponding Opt-Out button when a recipient clicks the opt-out link in an email message sent through Sugar's Campaigns module. When enabled, the button will have a black background. Users may also manually enable this button to exclude the email address from future email campaigns. For more information about opt-outs and campaigns, please refer to the Campaigns documentation in the Application Guide.



- **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.



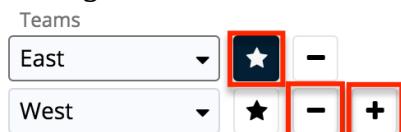
- **Tags** : The Tags field allows users to enter keywords or phrases in order to connect Sugar records by common attributes that may not be defined via basic database fields. Once a new tag has been created, it can be re-used by any user in any module that contains a Tags field. To use the Tags field, 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 in the Application guide.



- **Teams** : 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

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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.

## 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.

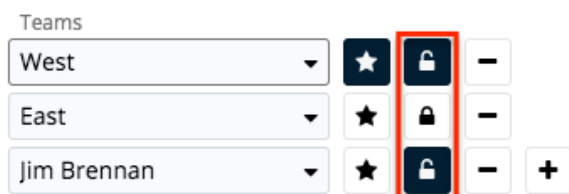
Team-based permissions have no effect on users who have not been assigned to roles that are configured with "Owner & Selected Teams" access. For more information, please refer to the Record Operation Definitions section of this page.

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

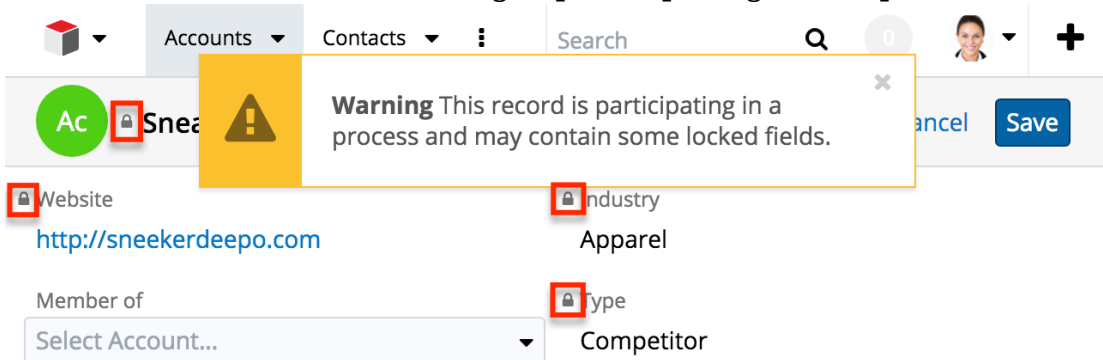
In the following example, members of team East have standard team access to the record (at a minimum, view permission), while Jim and members of team West have view permission plus extra access to do things such as working with restricted fields, and editing, deleting, and exporting the record. Note 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.



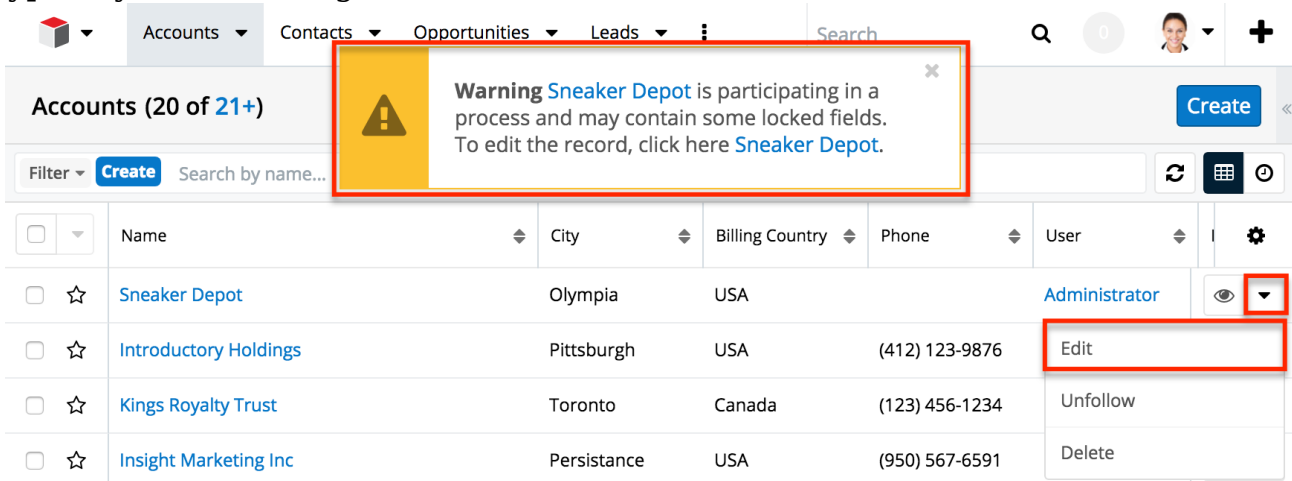
Note: Changes made to the selected state of teams on an existing record are audited in the record's change log.

## 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 Advanced Workflow 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.



## 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

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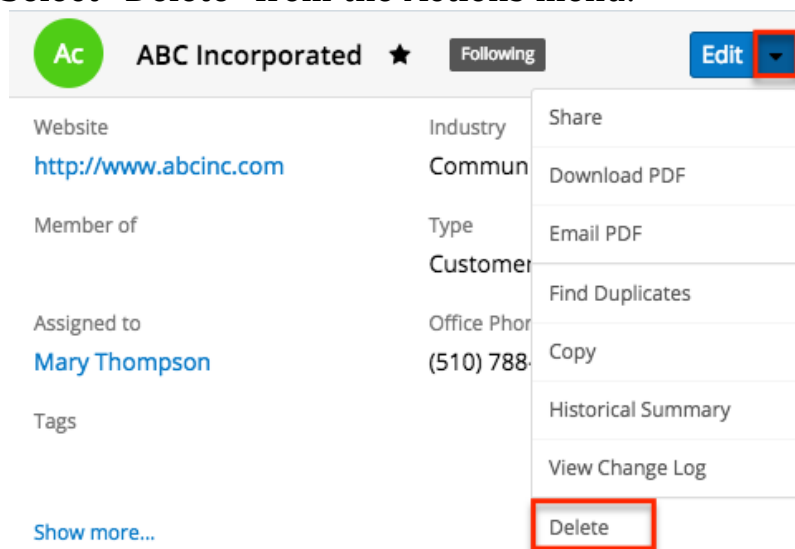
and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

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".






Name	City	Billing Country	
<a href="#">ABC Incorporated</a>	San Francisco	USA	 
<a href="#">Cloud Cover Trust</a>	St. Petersburg	Edit	
<a href="#">Air Safety Inc</a>	St. Petersburg	Unfollow	
<a href="#">DBA Inc.</a>	San Francisco	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.

<input type="checkbox"/>	Name	City	Billing Country
	<a href="#">Email</a>	San Francisco	USA
	<a href="#">Mass Update</a>	St. Petersburg	USA
	<a href="#">Add To Target List</a>	St. Petersburg	USA
	<a href="#">Merge</a>	San Francisco	USA
	<a href="#">Delete</a>	Kansas City	USA
	<a href="#">Export</a>	Los Angeles	USA
<input checked="" type="checkbox"/>	<a href="#">John Smith and Co...</a>	San Francisco	USA
<input checked="" type="checkbox"/>	<a href="#">ABC Company</a>	San Francisco	USA

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.

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## 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, and more information about emailing these records via campaigns is located on their individual documentation pages.

**Note:** Before users can send email 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.

The screenshot displays the Sugar CRM interface. On the left, there are two panels: 'MEETINGS (1)' and 'EMAILS (2)'. The 'EMAILS (2)' panel contains a table with the following data:

	Subject	Status	Date Created	
☆	Meeting Confirmation	Archived	01/11/2018 11:50am	👁
☆	Discuss pricing	Archived	12/21/2017 07:39am	👁

On the right, there is a 'History' dashlet. It shows a filter for 'Last 30 Days' and a summary of activity: 0 Meetings, 2 Emails, and 0 Calls. Below this, a specific email record is highlighted with a red box, showing a profile picture and the text: 'Meeting Confirmation' by 'Mary Thompson, 11 minutes ago'.

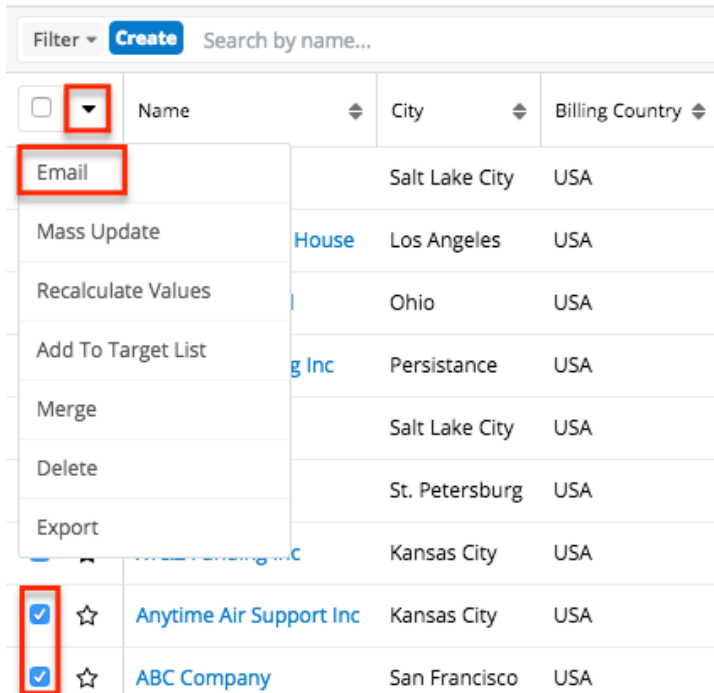
## Emailing via List View

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 in 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:

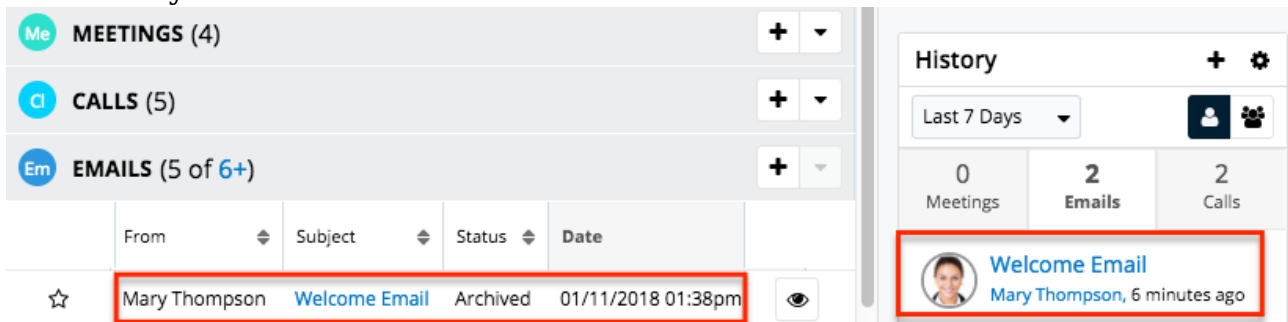
1. Navigate to the Accounts list view by clicking the Accounts module tab.

- Find and select the accounts in the list view that you would like to send an email to.
- Choose "Email" from the Mass Actions menu.



- 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.

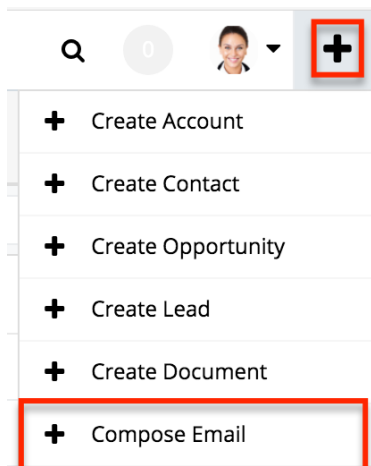


## Emailing via Quick Create

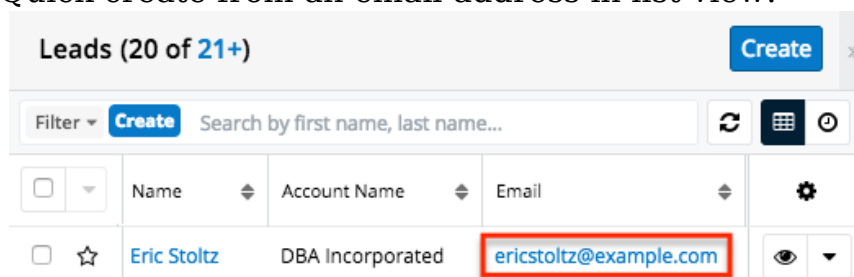
Quick Create provides an easy way to send an email from Sugar to the recipient associated with the record you are viewing. Quick Create for email messages can be accessed from the Quick Create menu on the navigation bar, from any Emails subpanel, or by clicking on a linked email address in Sugar list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

- Quick creating via Quick Create menu : Use "Compose Email" in the Quick

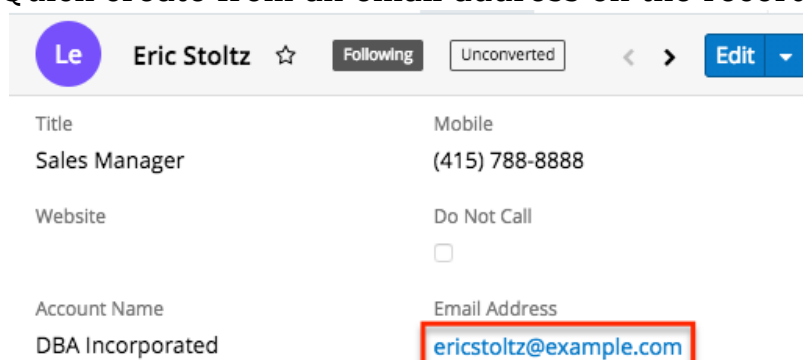
Create menu to relate a message to the record you are currently viewing and automatically populate the message's "To" field with the record's name and primary email address. If you use the Compose Email quick-create option from any other page, simply insert the desired recipient(s) manually as explained 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.

Do DOCUMENTS (1)						+ ▼
Em EMAILS (2)						+ ▼
	From	Subject	Status	Date		Create
☆	Administrator	White Cross Co	Draft	2018-01-02 11:00	👁️ ▼	
☆	Administrator	White Cross Co	Draft	2018-01-02 11:00	👁️ ▼	

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.

**Compose Email** Cancel Save Draft Send

Sherrill Pfeil Click on the recipient's name to make the To field editable.

Subject

---

<>
**B**
*I*
U
~~S~~
☰
☰
☰
☰
☰
A ▼
A ▼

Font Sizes ▼ Paragraph ▼ Font Family ▼
 📎
✍️
📄

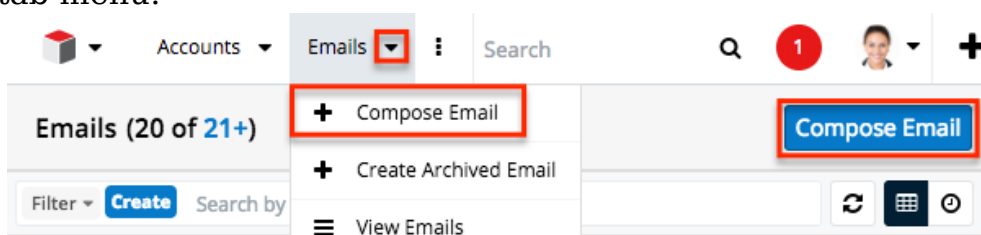
For more information on editing recipients, please refer to the Working With Recipient Fields section of the Emails documentation.

## 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 emails, 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 Advanced Workflow

Sugar's Advanced Workflow is available to administrators and users with developer-type role access. Process definitions created in Advanced Workflow 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.

Note: Advanced Workflow (formerly Sugar Process Author) is exclusive to Enterprise and Ultimate editions of Sugar 7.6.x and later.

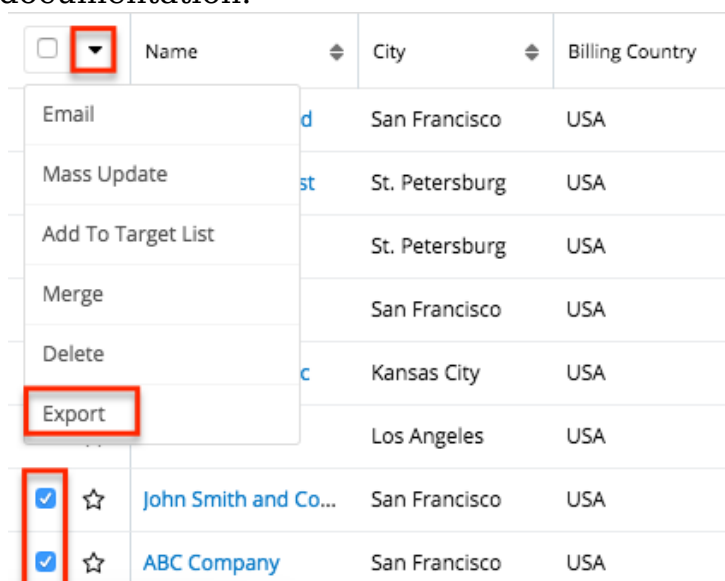
## Exporting Records

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

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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.



The screenshot shows a table with columns: Name, City, and Billing Country. A dropdown menu is open over the first row, with 'Export' highlighted. Below the table, two rows are selected with checkboxes.

<input type="checkbox"/>	Name	City	Billing Country
<input type="checkbox"/>	Email	San Francisco	USA
<input type="checkbox"/>	Mass Update	St. Petersburg	USA
<input type="checkbox"/>	Add To Target List	St. Petersburg	USA
<input type="checkbox"/>	Merge	San Francisco	USA
<input type="checkbox"/>	Delete	Kansas City	USA
<input type="checkbox"/>	Export	Los Angeles	USA
<input checked="" type="checkbox"/>	John Smith and Co...	San Francisco	USA
<input checked="" type="checkbox"/>	ABC Company	San Francisco	USA

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.

## 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.

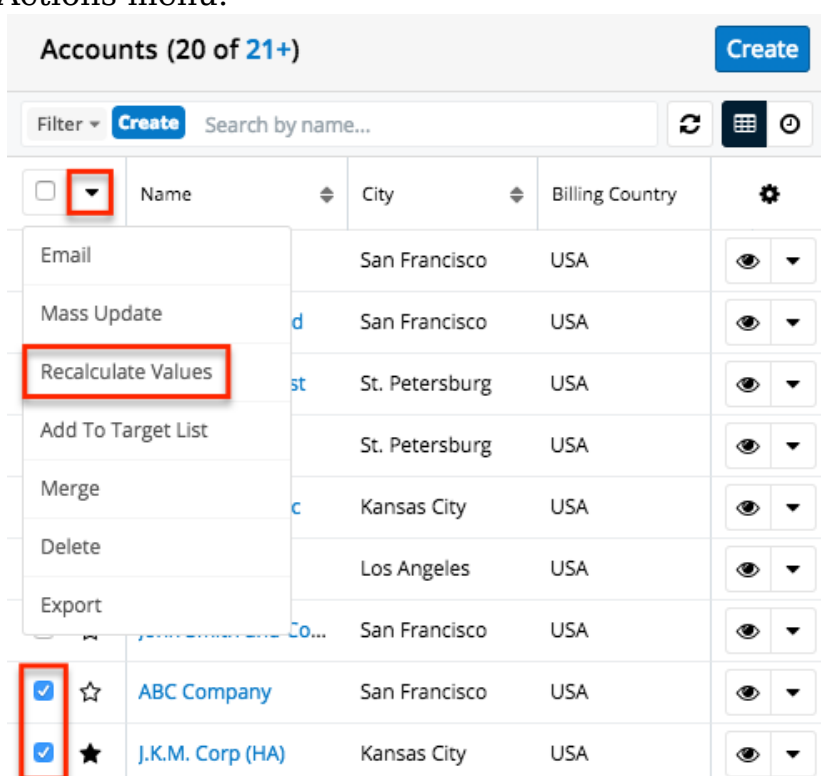
Note: This action will not appear unless the user is an administrator or has developer-level access to the module and there is at least one calculated value in that module. Please note that your ability to recalculate values may be restricted



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

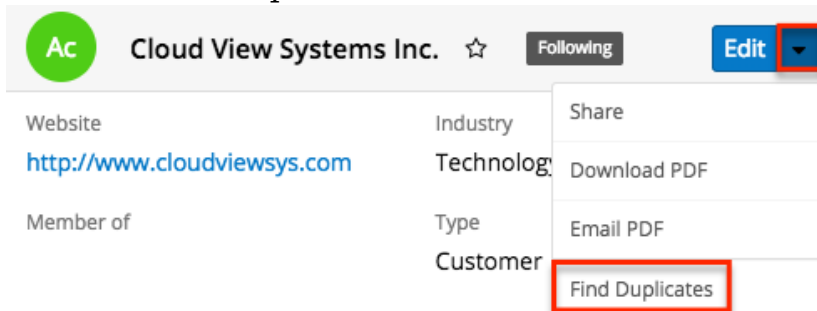
Between multiple users working in Sugar, importing new records, and converting leads, it is possible for duplicate records to be accidentally put into the system. Before creating a new record, the best practice is to first check that the record does not already exist in Sugar. You can identify duplicate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

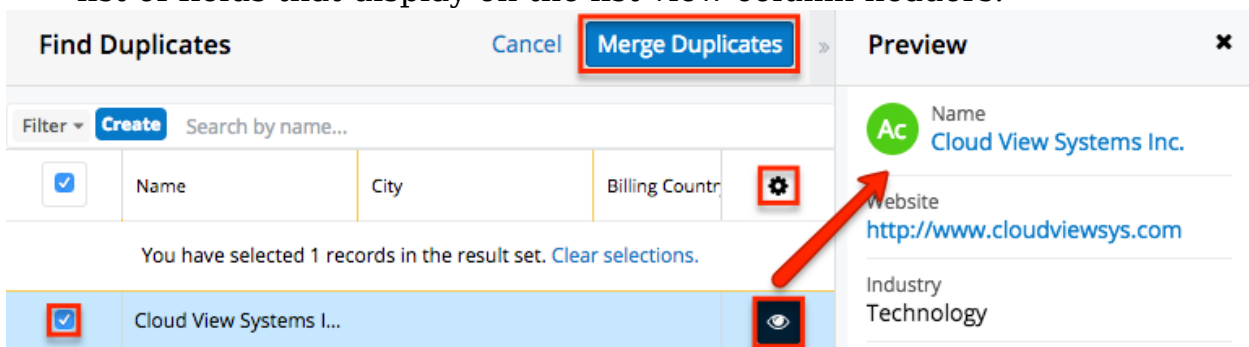
Please note that your ability to use the Find Duplicates action may be restricted by any role which prevents editing records. For more information on roles, please refer to the Role Management documentation. Check with your system administrator if you do not see the Find Duplicates option.

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".
  - o You can preview the duplicate record's details by clicking the Preview button to the far right of the record's row.
  - o 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.
  - o 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

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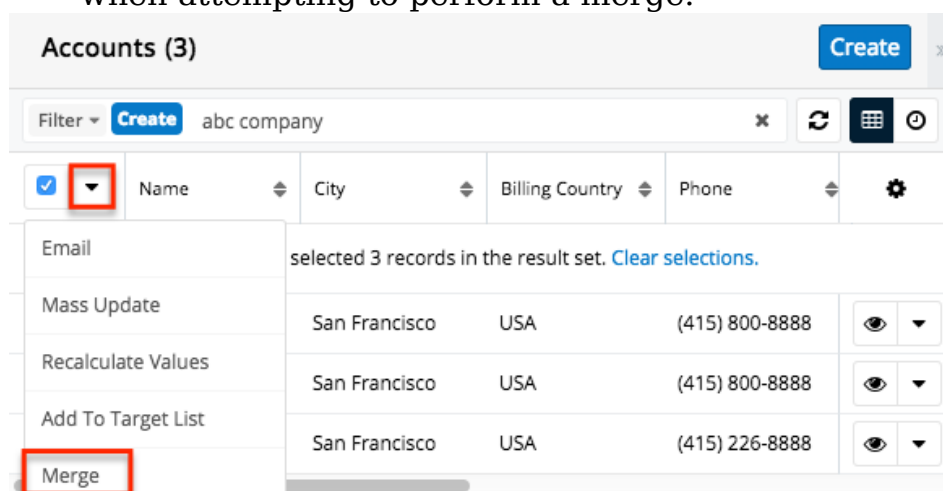
When duplicate records are identified in Sugar, you have the option to merge two or more into a single record. Once the merge is complete, the duplicate record(s) will be deleted, and the primary record will remain. Please note that all relationships belonging to the duplicate records will be merged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



The screenshot shows the 'Accounts (3)' list view in SugarCRM. At the top, there is a 'Filter' dropdown set to 'Create' and a search box containing 'abc company'. Below the search bar is a table with columns: Name, City, Billing Country, and Phone. A dropdown menu is open over the table, showing various actions: Email, Mass Update, Recalculate Values, Add To Target List, and Merge. The 'Merge' option is highlighted with a red box. The table also shows three rows of data, each with a 'selected' status and a 'Clear selections' link. The 'Merge' option is highlighted with a red box.

Name	City	Billing Country	Phone
San Francisco	USA	(415) 800-8888	
San Francisco	USA	(415) 800-8888	
San Francisco	USA	(415) 226-8888	

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.



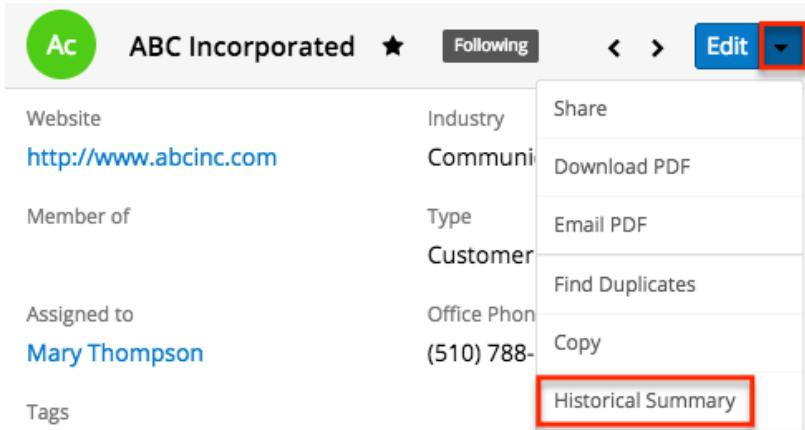
If 3 or more records are selected to be merged, an X icon will appear at the top right of each record. Clicking the "X" will remove the record from the merge process but will not delete the record.

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.

Type	Subject	Status	Description
Cl	Discuss Review Process	Held	
Me	Present finalized proposal to John	Held	Meeting to di...
Em	Meeting Confirmation	Sent	Hello John,I w...
Me	Follow up meeting	Not Held	Meeting to di...

## Viewing Record Change Logs

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

Website <a href="http://www.abcinc.com">http://www.abcinc.com</a>	Industry Communi	Share
Member of	Type Customer	Download PDF
Assigned to Mary Thompson	Office Phon (510) 788-	Email PDF
Tags		Find Duplicates
		Copy
		Historical Summary
		View Change Log

Once the change log opens, you can view the details of historical changes and can search by field name, old value, etc. by entering the keyword into the search box.





View Change Log <span style="float: right;">Close</span>					
Search by Field, Old Value, New Value.					
Field	Old Value	New Value	Changed By	Change Date	
Team Id	Mary	Global	max	01/10/2018 09:28am	
Teams	Global, Mary	Global	max	01/10/2018 09:28am	
Office Phone	(415) 788-8788	(510) 788-8788	max	01/09/2018 04:33pm	
Office Phone	(510) 788-8788	(415) 788-8788	max	01/09/2018 04:26pm	

Fields audited in this module: Name, Office Phone, Parent Account ID, Assigned User, Team Id, Team Set ID, Selected Team Set

## Record PDFs

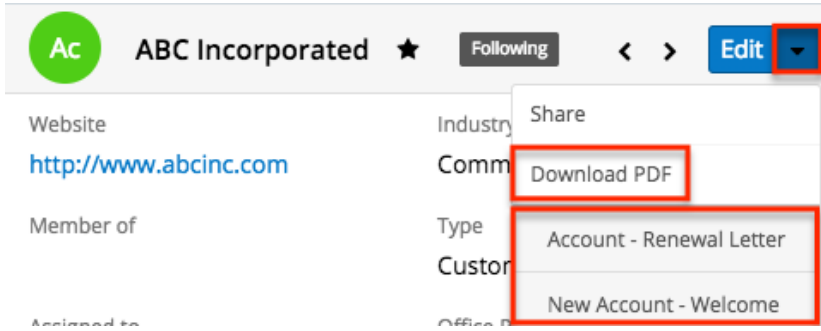
If you require a record's information outside of Sugar, you can download or email the information in PDF form. Administrators have the ability to build multiple PDF templates via Admin > PDF Manager for each module to ensure that the relevant record information is being included for your specific purpose. 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

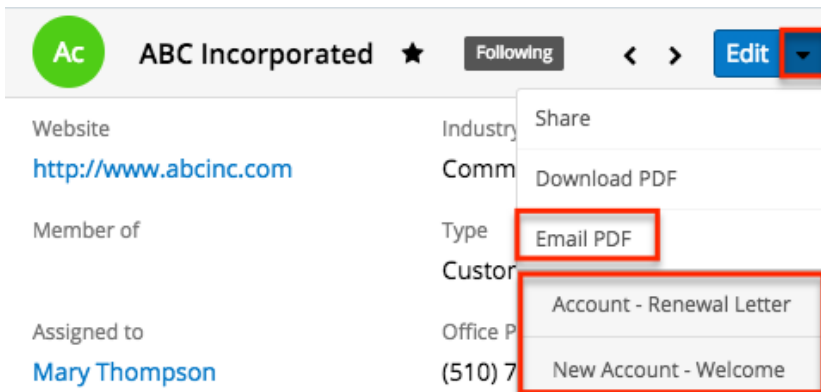
Download record information as a PDF file via the desired record's record view by selecting "Download PDF" from the Actions menu. All PDF templates which your administrator has created and made available for the module will appear beneath the Download PDF option. Simply select one of the templates to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



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 **ABC Incorporated** ☆Edit

From [Mary Thompson](#) Date 01/10/2018 11:05am

To support@abc.com

Here is the file you requested (You can change this text)

Attachments

Email Attachment : A... (408K)

Cc

Bcc

Assigned To [Mary Thompson](#)

Related To [ABC Incorporated](#)

Teams

Mary Thompson (Primary)

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

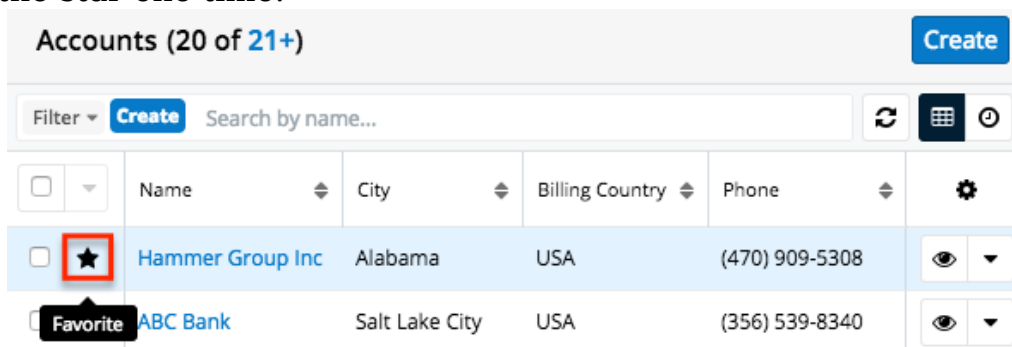
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Each Sugar user has the option to designate their own favorite records which are important or will be viewed often so that they can easily be accessed via list view search or from the module tab. Once records are marked as favorites, select "My Favorites"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

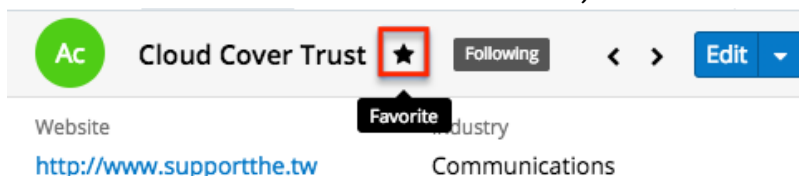


4. To remove the account as a favorite, click the star again to revert it to white.

## 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.

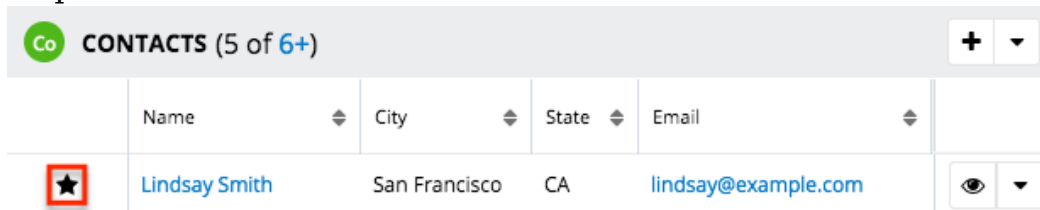


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## Favoriting via Subpanel

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 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".





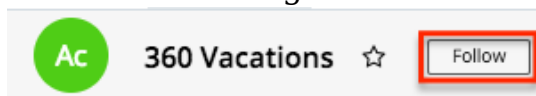
<input type="checkbox"/>	Name	City	Billing Country	Phone	
<input type="checkbox"/>	<a href="#">360 Vacations</a>	Salt Lake City	USA	(594) 853-9816	 
<input type="checkbox"/>	<a href="#">Waverly Trading House</a>	Los Angeles	USA		Edit
<input type="checkbox"/>	<a href="#">Kaos Trading Ltd</a>	Ohio	USA		Follow

- 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:

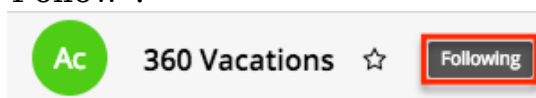
- Navigate to an account's record view.
- Click on the Follow button to the right of the account's name to change its label to "Following".



Website

<http://www.360vacay.com>

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



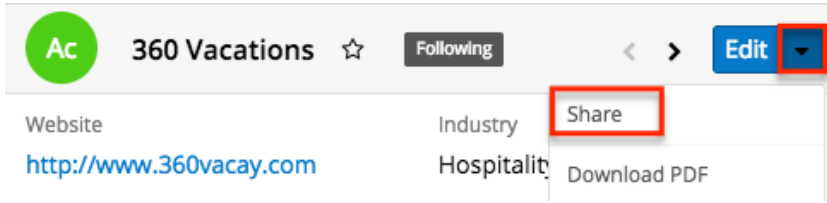
Website

<http://www.360vacay.com>

## 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".











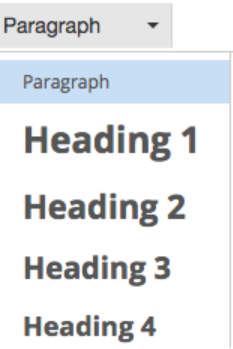
The recipient can simply click the link in the email to access the account record in Sugar. Please note that the user must be logged into Sugar in order to access the record. Users will only be able to view the shared record as allowed by their team membership, user access type, and assigned roles. For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

## 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.  Note: Sugar uses TinyMCE 4.x for Sidecar modules. By default, this version supports HTML5 schema elements and will strip any HTML formatting elements that do not adhere to these specifications.
Bold, Italic, Underline, Strikethrough		Use these basic font formatting options to easily add common styles to text in the message

		body.
Bullet List, Numbered List		Transform paragraphs in the message body into a formatted list.
Align Left, Align Center, Align Right, Justify		Set paragraph alignment.
Text Color, Background Color		Choose a custom font color or highlight text with a background font color.
Clear Formatting		Clear any formatting.
Insert/Edit Image, Insert/Edit Link		Insert or edit an image or a link.
Font Sizes		Choose a font size for the text.
Paragraph		Choose a format for headers.

Last Modified: 2018-04-30 20:51:21

## 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

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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

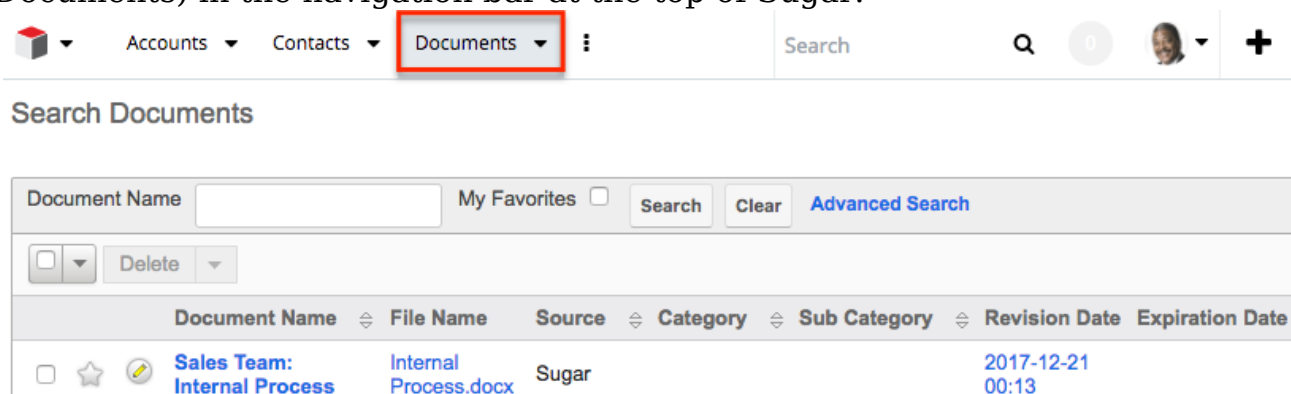
This documentation will cover the Legacy user interface which is carried over from Sugar 6. Below is a list of modules which use the Legacy user interface. Other modules use the updated Sidecar user interface which is described in detail in the

- Calendar
- Campaigns
- 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 screenshot shows the top navigation bar of the Sugar CRM interface. The 'Documents' tab is highlighted with a red box. Below the navigation bar, the 'Search Documents' section is visible. It includes a search input field, a 'My Favorites' checkbox, and buttons for 'Search', 'Clear', and 'Advanced Search'. Below the search section, there is a table with columns for Document Name, File Name, Source, Category, Sub Category, Revision Date, and Expiration Date. A single record is displayed with the following details:

Document Name	File Name	Source	Category	Sub Category	Revision Date	Expiration Date
Sales Team: Internal Process	Internal Process.docx	Sugar			2017-12-21 00:13	

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

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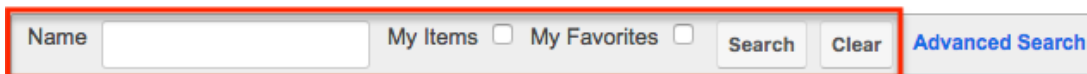
and roles, please refer to the Team Management and Role Management documentation.

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



The image shows a search interface for 'Search Campaigns'. It features a text input field with the placeholder 'Name'. To the right of the input field are two checkboxes: 'My Items' and 'My Favorites'. Further right are two buttons: 'Search' and 'Clear'. To the far right is a blue link labeled 'Advanced Search'. A red rectangular box highlights the input field, the 'My Items' and 'My Favorites' checkboxes, and the 'Search' and 'Clear' buttons.

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.

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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.

### Search Campaigns

The screenshot shows the Advanced Search panel for Search Campaigns. It includes the following elements:

- Name:** A text input field.
- Start Date:** A date picker with a dropdown set to "Equals" and a format of "(yyyy-mm-dd)".
- End Date:** A date picker with a dropdown set to "Equals" and a format of "(yyyy-mm-dd)".
- Status:** A multi-select dropdown with options: Planning, Active, Inactive, Complete, In Queue.
- Type:** A multi-select dropdown with options: Telesales, Mail, Email, Print, Web.
- Assigned to:** A multi-select dropdown with options: Administrator, Chris Olliver, Max Jensen, Max Jensen, Sally Bronsen, Sarah Smith.
- My Favorites:** A checkbox that is currently unchecked.
- Layout Options:** A dropdown menu that is expanded, showing "Layout Options".
- Save search as:** A text input field with a "Save" button next to it.
- Modify current search:** "Update" and "Delete" buttons.
- Search:** A button to execute the search.
- Clear:** A button to clear the search criteria.
- Basic Search:** A link to switch to the basic search view.
- Saved Searches:** A dropdown menu currently showing "-none-".

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



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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.

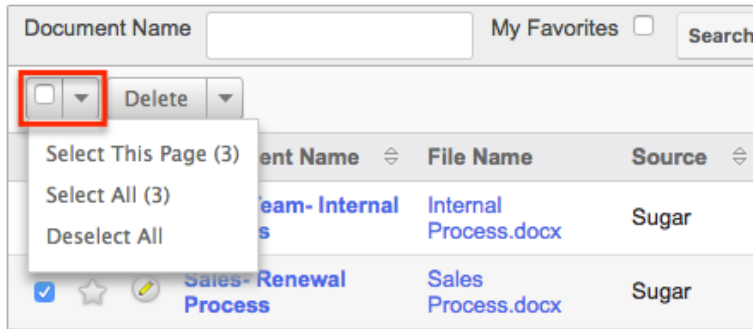
To select or deselect records in the Legacy modules list view, use the following methods:

- **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.

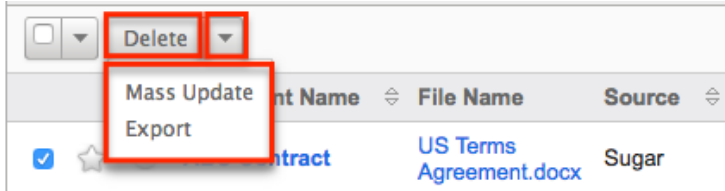




When selecting records, you can page through all of the records and Sugar will remember which records are selected. Depending on your Sugar settings you may see the count of records being selected or you may see a plus sign (+) to refer to more records. Simply select the Deselect All option to remove 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.

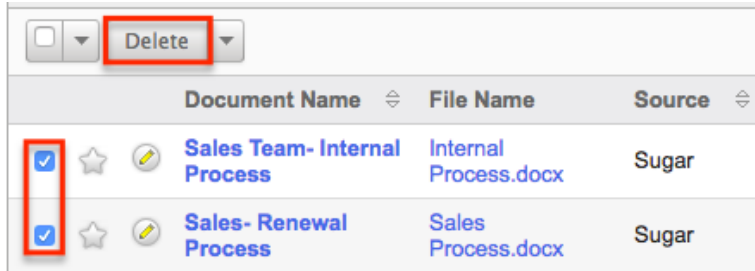


## Delete

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.

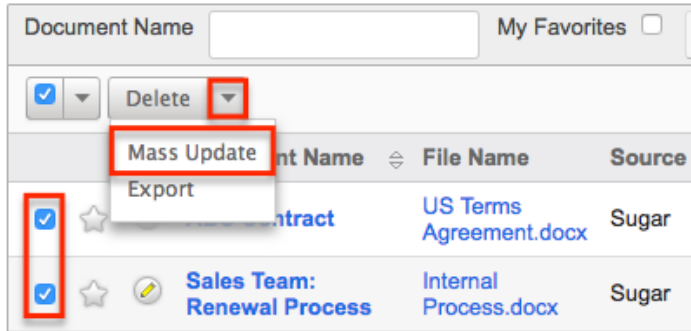
Please note that your ability to mass update may be restricted by a role. For more information on roles, please refer to the Role Management documentation. Check with your system administrator if you do not see the Mass Update option.

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

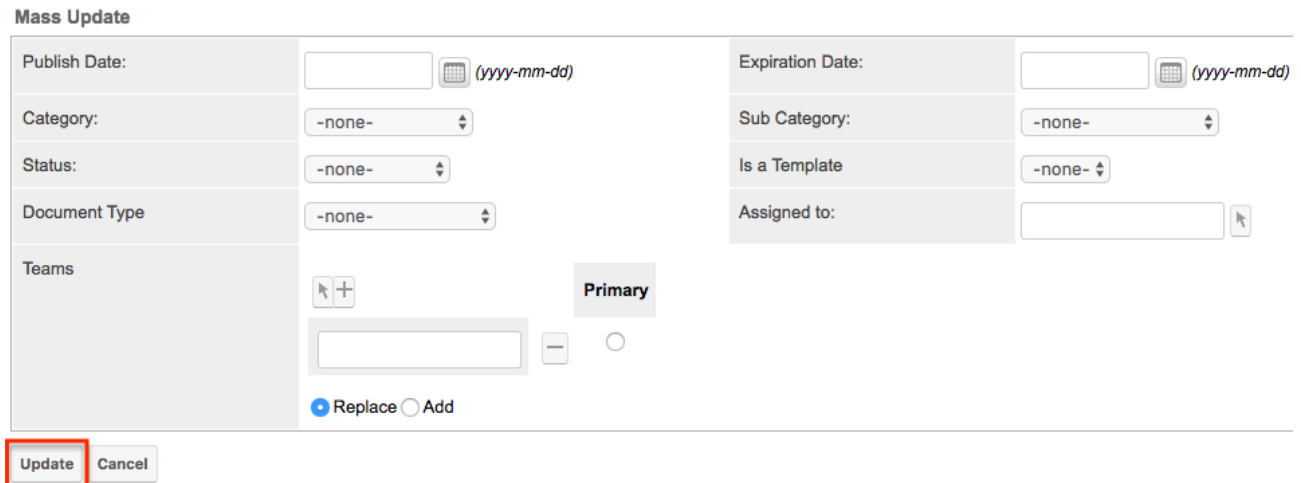
1. Navigate to the list view by clicking the module tab in the navigation bar.
2. Use the list view's Basic or Advanced Search to identify records you wish to modify.
3. Select the desired records individually or using the checkbox dropdown's

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.



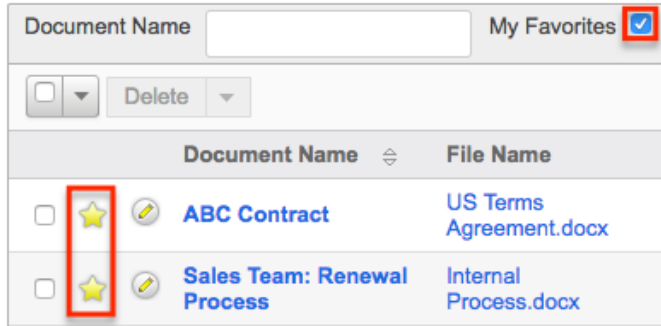
6. Click "Update" to save the changes to all of the currently selected records.

## 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.

[ABC Contract](#) » Edit

**Save** Cancel Save and Continue (1 of 3) \* Indicates required field

**Overview**

Source: Sugar

File Name: \* US Terms Agreement.docx Status: Active

Document Name: \* ABC Contract Revision: \* 1

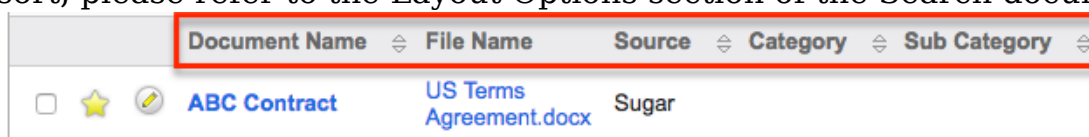
Please note that your ability to edit records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation. Check with your system administrator if you do not see the Edit options.

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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

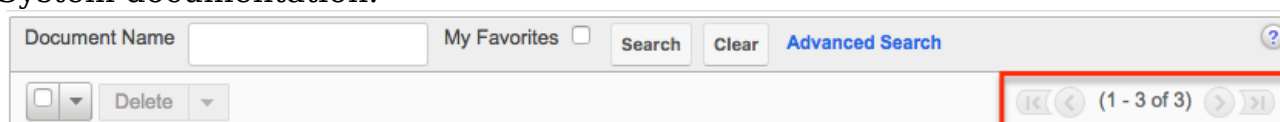
List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, simply click the column header noting that the fields which allow sorting will have a pair of arrows. You can click the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

Campaign	Status	Type	End Date	User	Date Created
<input type="checkbox"/> <input type="star"/> <input type="edit"/> <a href="#">December 2017 Holiday Special</a>	Active	Email	01/31/2018	Max Jensen	12/21/2017 04:33pm

## 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.

[December 2017 Holiday Special](#) ☆

(1 of 1)

Overview	
Name:	December 2017 Holiday Special
Status:	Active
Start Date:	12/15/2017
Type:	Email
End Date:	01/31/2018
Impressions:	0
Budget: (USD \$):	20,000.00
Expected Cost: (USD \$):	
Actual Cost: (USD \$):	
Expected Revenue: (USD \$):	
Objective:	
Description:	Holiday 2017 special for existing customers. 20% off all merchandise.


Other	
Assigned to:	Max Jensen
Date Modified:	12/21/2017 04:40pm by Administrator
Teams:	Global (Primary)
Date Created:	12/21/2017 04:33pm by Administrator

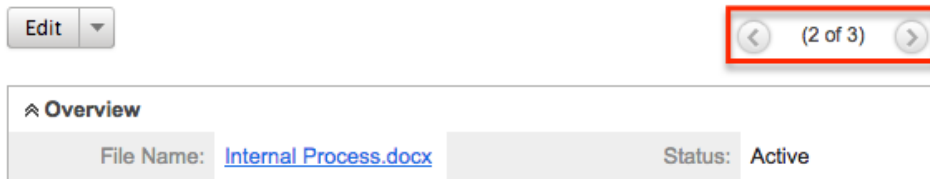


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## Next or Previous Record


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.

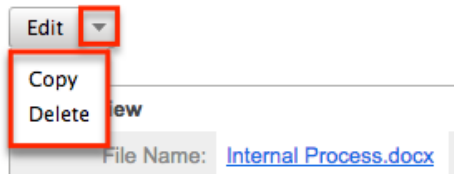
Sales Team: Renewal Process 



## Actions Menu

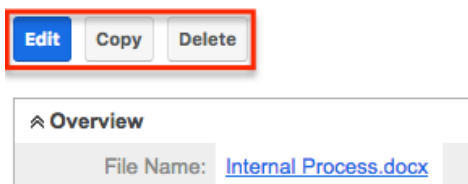
The Actions menu on the top left of each detail view allows you to perform various actions (e.g. Edit, Share, Copy, Delete, etc.) on the current record. Please note that the action items available in the Actions menu will vary between each Legacy module.

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 

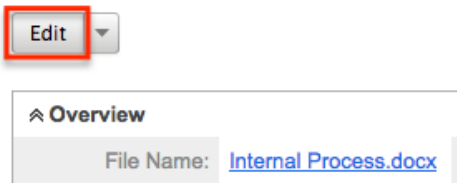


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## Edit

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 ☆



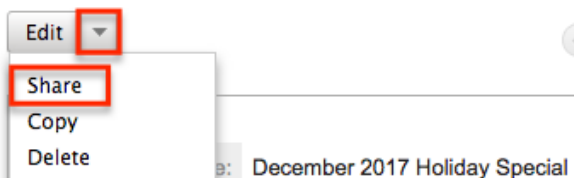
Please note that your ability to edit records in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation. Check with your system administrator if you do not see the Edit options.

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".

December 2017 Holiday Special ☆



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.

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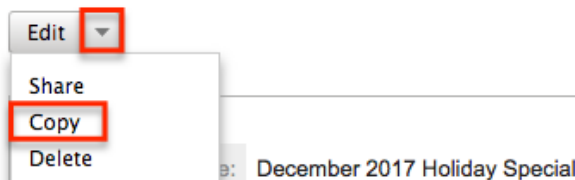
## Copy

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.

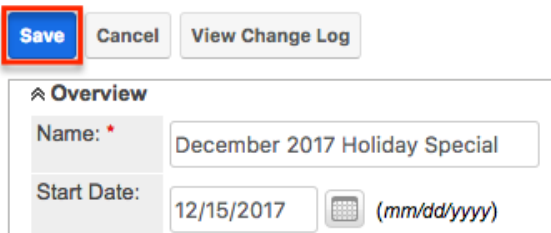
Use the following steps to create a record by duplicating an existing record:

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 ☆

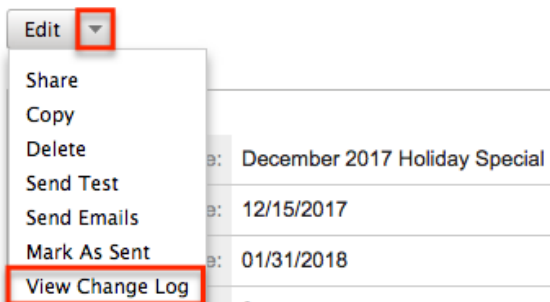


3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

## View Change Log

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

December 2017 Holiday Special ☆



## 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.



## December 2017 Holiday Special ☆

Edit ▼

Launch Wizard

View Status

View ROI

### Overview

Name:	December 2017 Holiday Special	Status:	Active
Start Date:	12/15/2017	Type:	Email
End Date:	01/31/2018		
Impressions:	0		
Budget: (USD \$):	20,000.00	Expected Cost: (USD \$):	
Actual Cost: (USD \$):		Expected Revenue: (USD \$):	
Objective:			
Description:	Holiday 2017 special for existing customers. 20% off all merchandise.		

### Other

Assigned to:	Max Jensen	Date Modified:	12/21/2017 04:40pm by Administrator
Teams:	Global (Primary)	Date Created:	12/21/2017 04:33pm by Administrator

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.






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### Activities

Create Task ▾		
Subject ⇅	Status ⇅	Contact
 Conference call with Lindsay	Scheduled	
 Follow up on signed agreement	Not Started	

### History

Create Note or Attachment ▾			
Subject ⇅	Status ⇅	Contact	Date Modified ⇅
 Process Review Meeting	Held		12/21/2017 06:21pm

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.

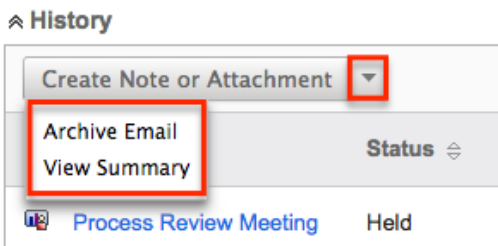
Note: When creating a Task, Meeting, or Call from the Activities subpanel, you have the ability to set the Status field to "Held" or "Completed" which will place it in the History subpanel.

### Activities

Create Task ▾			Status ⇅
Schedule Meeting			
Log Call			
Compose Email			
Conference call with Lindsay	Scheduled		

You have the following actions available from the History subpanel:

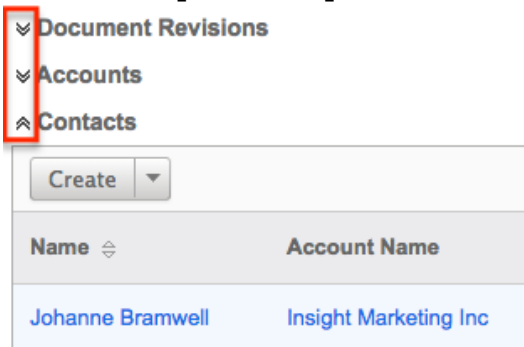
- **Create Note or Attachment** : Creates a new note record related to the record currently being viewed.
- **Archive Email** : Allows a received email to be entered manually on a record for historical purposes only.  
Note: This will not send an email to you or the email address on the record.
- **View 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.



Contacts			
Create			
(1 - 2 of 2)			
Name	Account Name	Email	Office Phone
Johanne Bramwell	Insight Marketing Inc	vegan64@example.net	(327) 402-3565
Don Connors	Super Star Holdings Inc	kid.sales.sales@example.de	(211) 592-3480

Cases					
Create					
(0 - 0 of 0)					
Num.	Subject	Account Name	Status	Date Created	As Us

## 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.

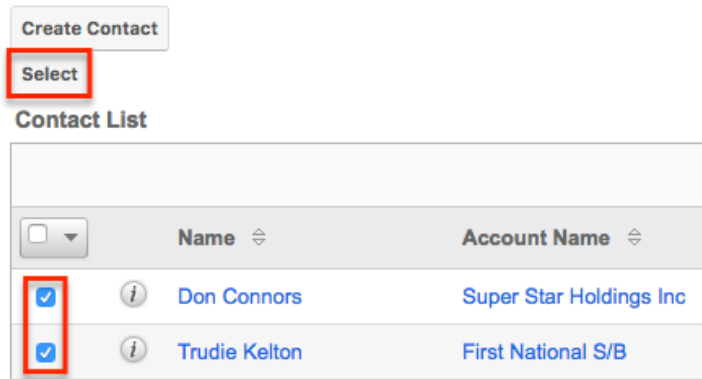
Contacts	
Create	
Name	Account Name
Johanne Bramwell	Insight Marketing Inc

- **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.

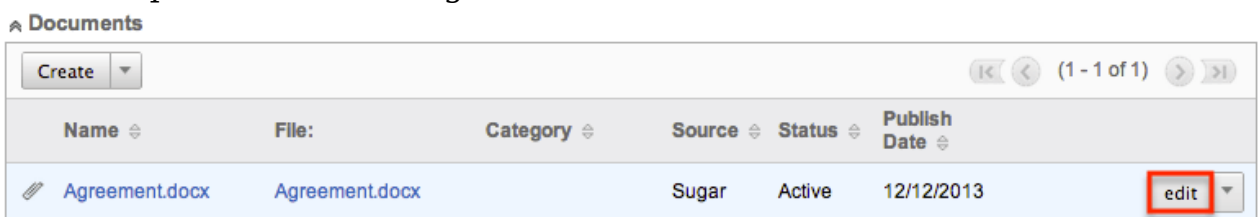
Contacts	
Create	
Name	Account Name
Johanne Bramwell	Insight Marketing Inc

Note: You may select multiple records in the search popup to be related to the main record.

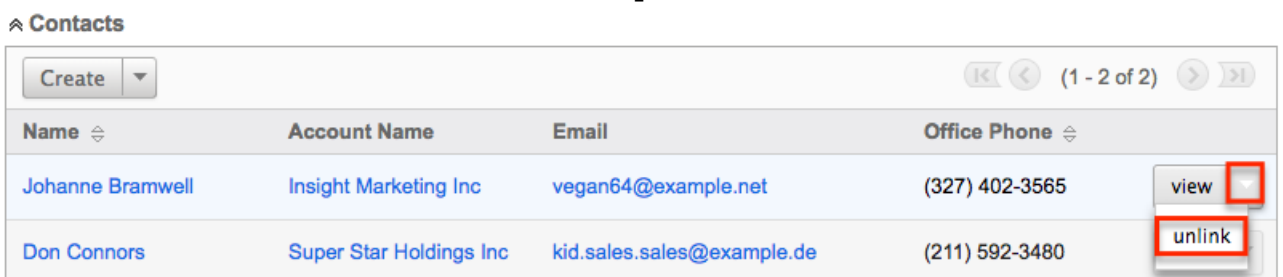




- Edit : Choose "Edit" on the far right of the record's row to edit the related record in the subpanel. Make the necessary changes to the record then click "Save" to preserve the changes.



- 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.



## ^ Cases

Num. ⇅	Subject ⇅	Account Name ⇅	Status ⇅	Date Created ⇅
249	System not responding	XY&Z Funding Inc	Closed	12/21/2017 03:39pm

## 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.

## ^ Contacts

Name ⇅	Account Name	Email	Office Phone ⇅
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## 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.

Sales Team: Renewal Process ☆

Edit ▾

### ^ Overview

File Name: [Internal Process.docx](#)

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.



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## 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.

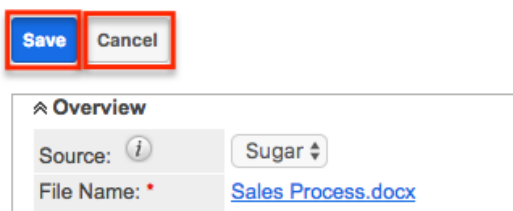
[Sales Team: Renewal Process](#) » Edit



## 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.

[Sales Team: Renewal Process](#) » Edit



Administrators in Sugar can configure the Edit View layout via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation.

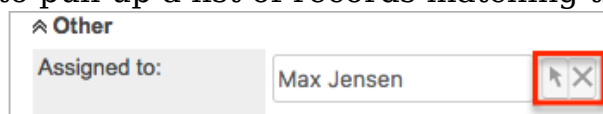
## Editing Related Fields

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

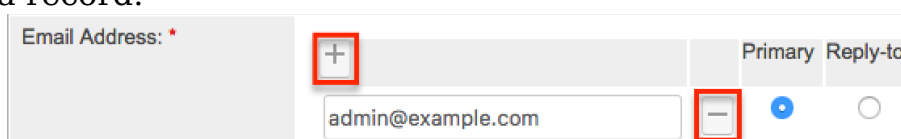
- Relate : Most one-to-many relationships in Sugar are represented by a relate

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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.

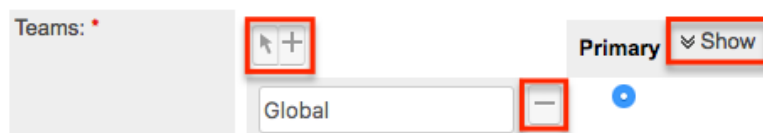


- Flex Relate : Allows a dynamic module and a record from that module to be related to the current record. Users can first select the module from the dropdown list then choose or enter the record they wish to relate to the current record they are viewing.
- Email Addresses : Email address fields can 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.

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

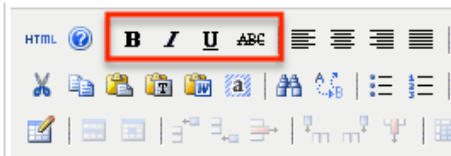
## Using the TinyMCE Text Editor

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.

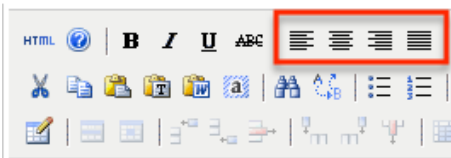


The following are some descriptions of the more commonly used features in TinyMCE:

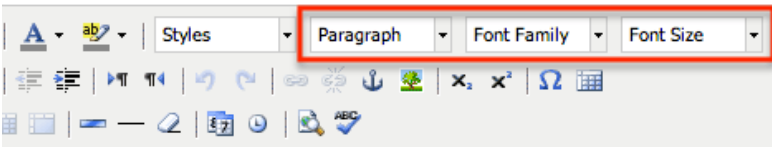
- Text Formatting : Use the following buttons to format text to be bold, italics, underlined, or stricken through.



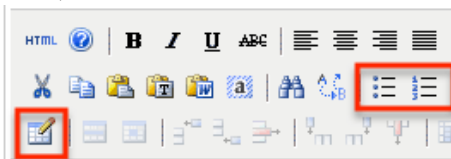
- Alignment : Use the following buttons to change the alignment of the text to be left, center, right, or justified.



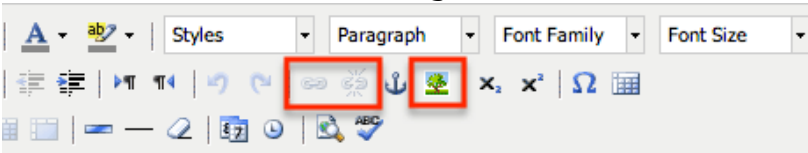
- Fonts : Use the following dropdowns to select special section formatting, fonts, and sizes.



- Layout Formatting : Use the following buttons to utilize bullet list, ordered lists, and tables.

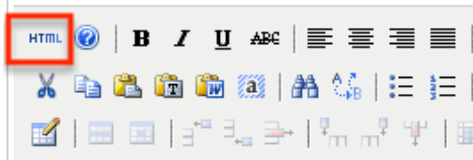


- Links and Images : Use the following buttons to create a link, remove a current link, or add an image.



- Advanced HTML : Click the HTML button to view your content in full HTML code. You may add and change the HTML to further refine your content. Not all HTML is allowed to be saved in Sugar. The following are some examples of HTML that will be removed when saved:
  - Anything outside of the <body></body> tags.
  - Any <style></style> tags.

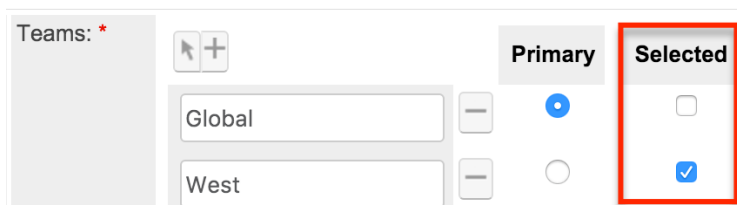
- Any `<script></script>` tags.
- Any `<form></form>` tags.
- Any `<input>` tags. Note: Inline CSS can be added to some elements (e.g. `<p>`, `<pre>`, and `<span>`), but due to different email clients rendering HTML email in unexpected ways, inline CSS is not allowed on some elements (e.g. `<div>`, `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



## 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, etc.). 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 legacy module, simply navigate to a record view, click "Edit", and look for a checkbox labeled "Selected" next to the Teams field:



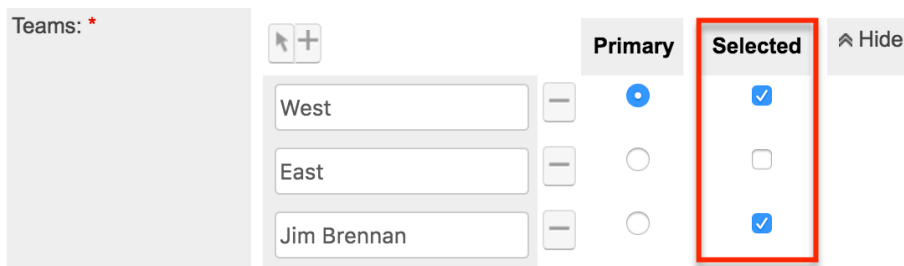
Note: Sidecar modules also support team-based permissions but use a lock button next to the Teams field to indicate whether or not the team's members have extra access to the record.

To grant extra access to a record for all members of a team who have role permission, check the Selected checkbox 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 and Selected Teams" as

described in the Role Management documentation.

Team Setting	Checkbox	Description
Additional Permissions Enabled	selected	Members of this team have extra access to this record or fields within the record as controlled by their roles
Additional Permissions Disabled	not selected	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 change log.

Last Modified: 2018-01-26 00:42:01

## 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.

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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, 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.

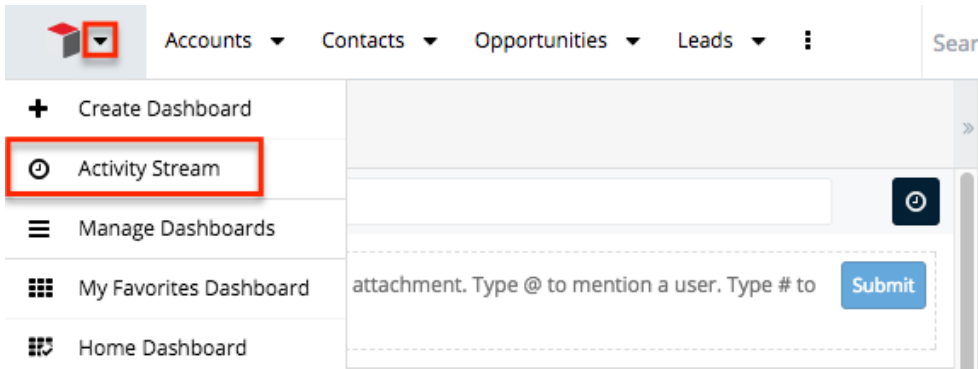
Please note that you will only be able to view and access the activity stream for audit-enabled modules (Accounts, Bugs, Calls, Cases, Contacts, Leads, Meetings, Notes, Opportunity, Quoted Line Items, Revenue Line Items, and Tasks) in Sugar. Un-audited modules (e.g. Target, Target List) will not display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

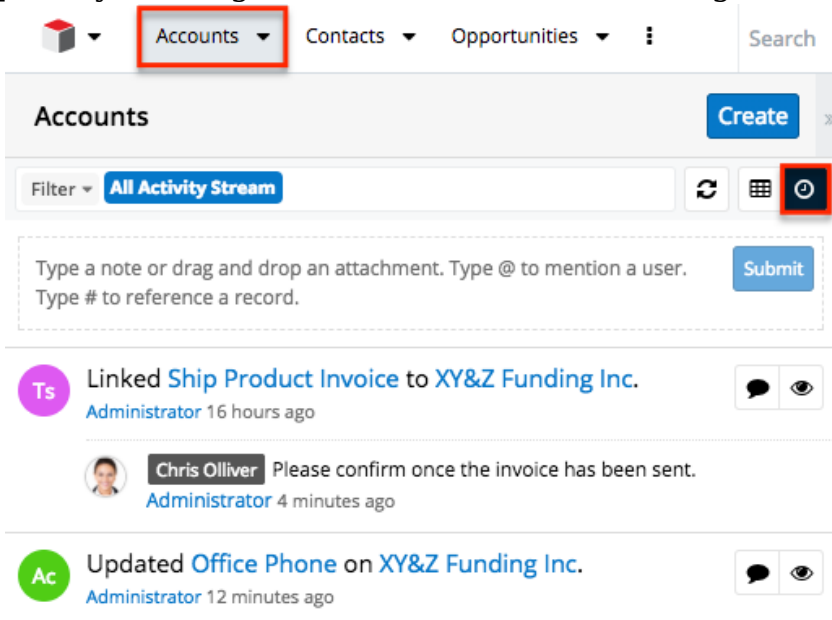
The Home page activity stream allows users to view all posts for records they are following in Sugar as well as all user posts created on the Home page activity stream. For more information on following records, please refer to the Following Records section. You can access the Home page activity stream 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 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



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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.

The screenshot displays the record view for 'ABC Incorporated'. At the top, there is a header with a green profile icon 'Ac', the name 'ABC Incorporated', a star icon, a 'Following' button, and an 'Edit' dropdown menu. Below this, a table-like structure shows fields: 'Website' (http://www.abcinc.com), 'Industry' (Communications), 'Member of', 'Type' (Customer), 'Assigned to' (Mary Thompson), and 'Office Phone' ((415) 828-8788). There is also a 'Tags' section and a 'Show more...' link. Below the record details is an activity stream section with a 'Module' dropdown set to 'All', a 'Filter' dropdown set to 'All Activity Stream', and a 'Submit' button. The activity stream contains two posts: one by 'Ts' (Mary Thompson) titled 'Linked Ship Product Invoice to ABC Incorporated to ABC Incorporated.' with a comment from 'Chris Olliver' and a timestamp of '01/05/2018 12:14pm'; and another by 'Ac' (Mary Thompson) titled 'Updated Office Phone on ABC Incorporated.' with a timestamp of '3 minutes ago'. The entire activity stream section is highlighted with a red border.

## 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.

The screenshot displays a CRM record for ABC Incorporated. The main record details include the website (http://www.abcinc.com), industry (Communications), member of (Customer), assigned to (Mary Thompson), and office phone ((415) 828-8788). Below the record details is a table of tasks:

Subject	Status	Contact	Preview
Ship Product Invoice	Not Started	John Moore	Preview (indicated by red arrow)
Send contract	Deferred	Muriel Ormond	Preview
Close out support r...	Completed	Miles Rux	Preview

The 'Preview' pane on the right shows details for the 'Ship Product Invoice' task:

- Subject: Ship Product Invoice
- Start Date: (blank)
- Priority: High
- Due Date: 01/12/2018 12:13pm
- Status: Not Started
- Assigned to: Chris Oliver
- Related to: ABC Incorporated
- Tags: (blank)

Below the task list, a red box highlights a section of the activity stream:

- Linked Ship Product Invoice to ABC Incorporated to ABC Incorporated. Mary Thompson an hour ago
- Chris Oliver Please confirm once the invoice has been sent to John. Thanks! Mary Thompson an hour ago
- Created Ship Product Invoice to ABC Incorporated Task. Mary Thompson an hour ago

## 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.

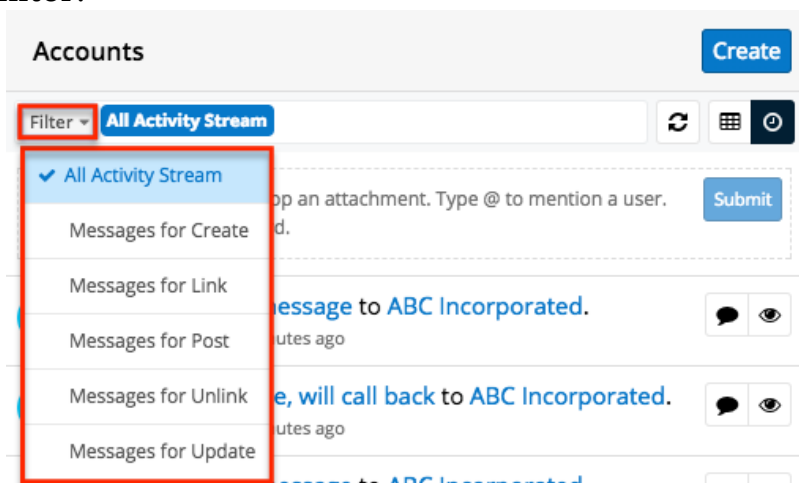
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## Post Options

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.

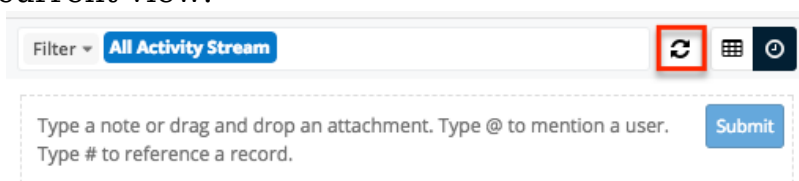
## Filter Options

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

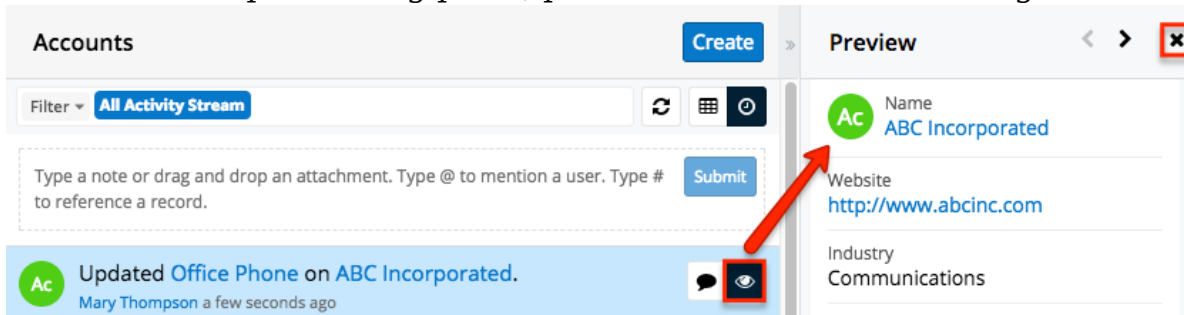
The Refresh button is located to the right of the filter options and provides a quick way to load the most recent activity stream posts without reloading the browser or losing any filter criteria you may have set. Simply click the button to refresh the current view.



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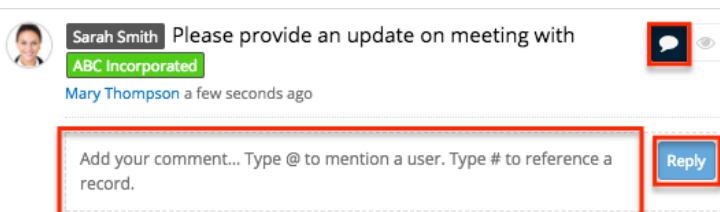
## Preview Button

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.

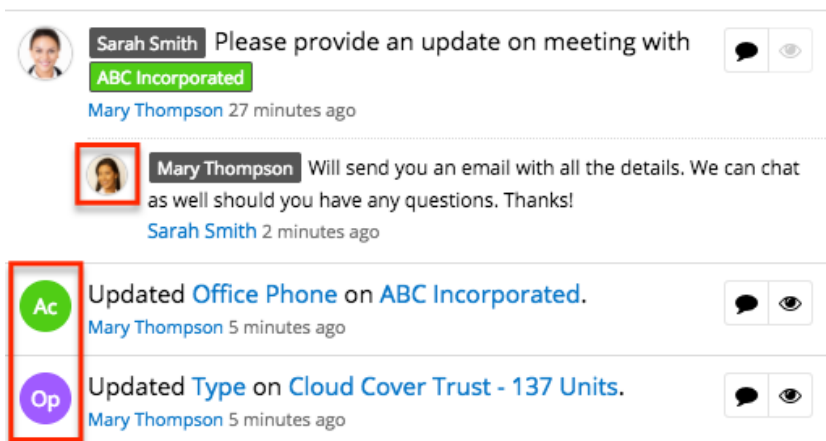


## Post Icon

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

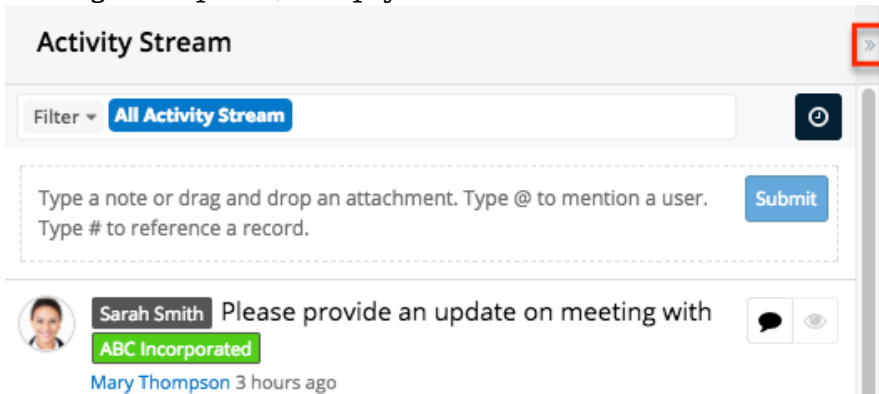
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module to differentiate the various record posts for modules. For example, an update post for the Accounts module will display a green circle with the letters "Ac", while a post for the Opportunities module will display a purple circle with the letters "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.

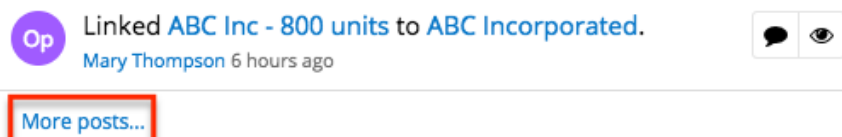


## More Posts

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

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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

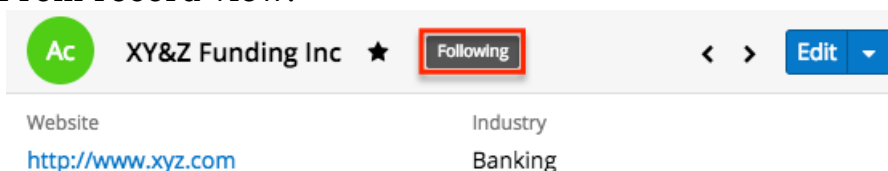
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Users can also choose to unfollow records that they no longer wish to view posts for in their activity stream. Please note that this will prevent all future posts as well as the associated comments from appearing in your Home page and List View activity 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:

Name	City	Billing Country	
<a href="#">ABC Incorporated</a>	San Francisco	USA	 ▼
<a href="#">XY&amp;Z Funding Inc</a>	Kansas City	USA	 ▼
<a href="#">Smith &amp; Sons</a>	Los Angeles	USA	Edit
<a href="#">John Smith and Co...</a>	San Francisco	USA	Unfollow

From record view:



The record view header for XY&Z Funding Inc includes a profile icon (Ac), the company name, a star icon, a "Following" button (highlighted with a red box), and navigation arrows and an "Edit" button. Below the header, the website "http://www.xyz.com" and industry "Banking" are displayed.

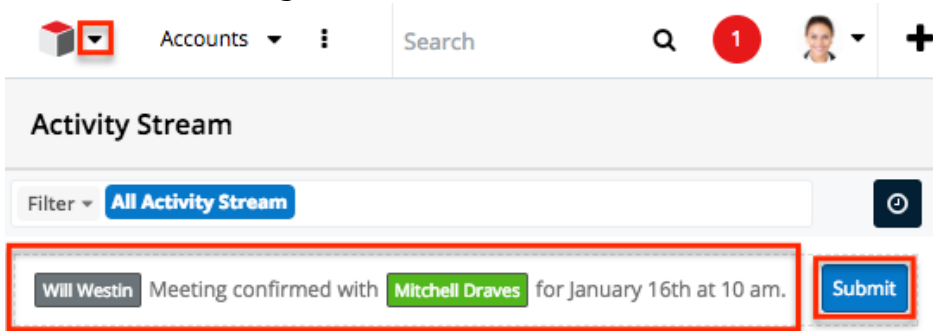
## Creating User Posts

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.

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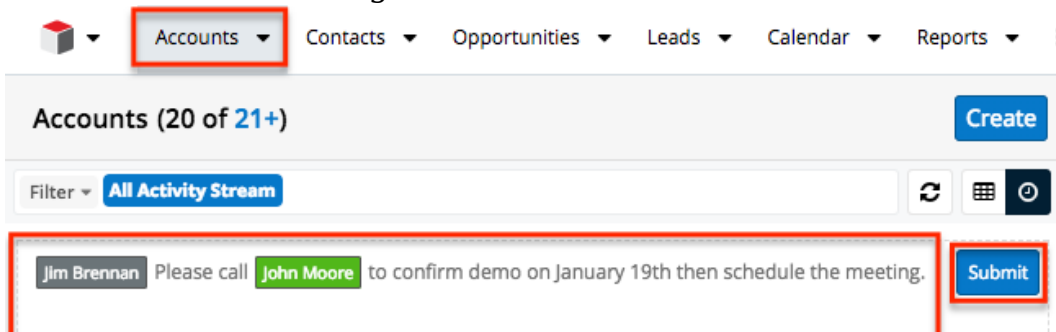
## Creating via Home Page

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



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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.

Ac ABC Incorporated ★ Following Edit

Website: <http://www.abcinc.com> Industry: Communications

Member of: Type: Customer

Assigned to: [Mary Thompson](#) Office Phone: (415) 782-8788

Tags

Show more...

Module: All Filter: All Activity Stream

Sarah Smith Follow up with John Smith regarding the signed proposal Submit

## 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.

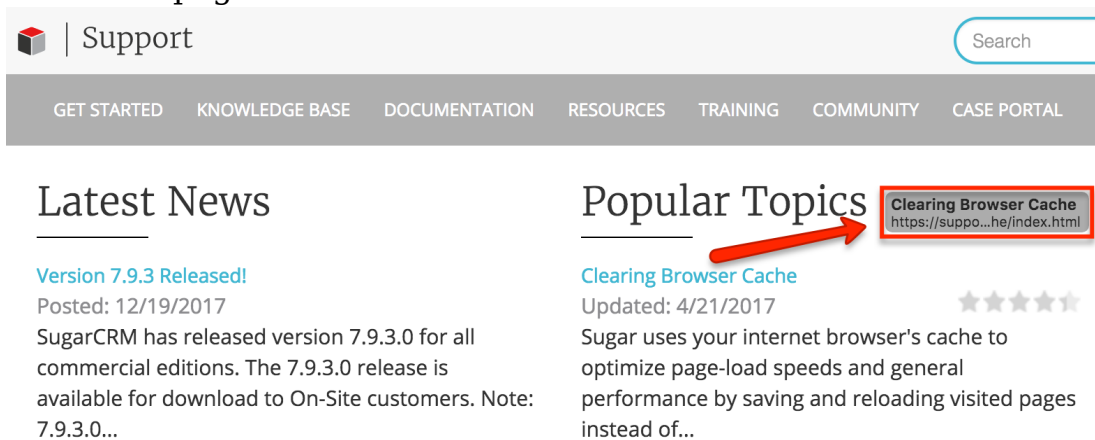
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To add external links, messages, etc., simply drag and drop the corresponding title that's linked to a URL into the post input box. For example, to add a video from YouTube, click the title (e.g. "How to install SugarCRM") of the video then drag and 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](http://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.

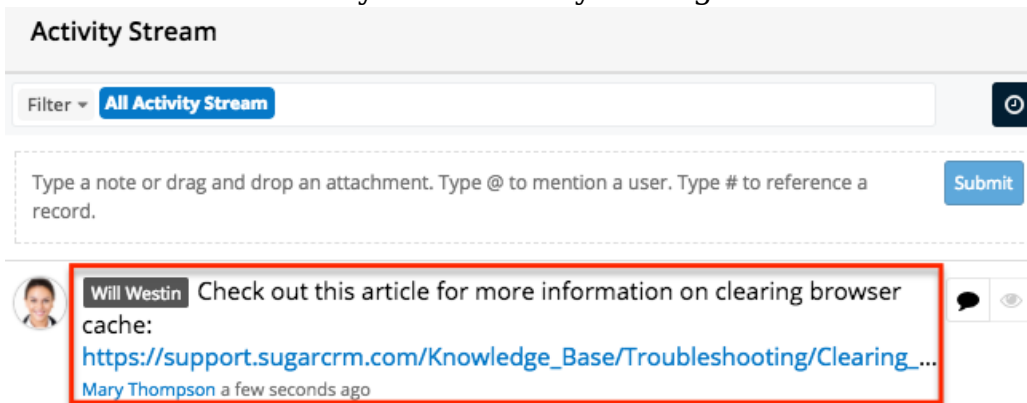


2. Drag and drop the link into the post input box on your Home page activity stream then click "Submit".



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.

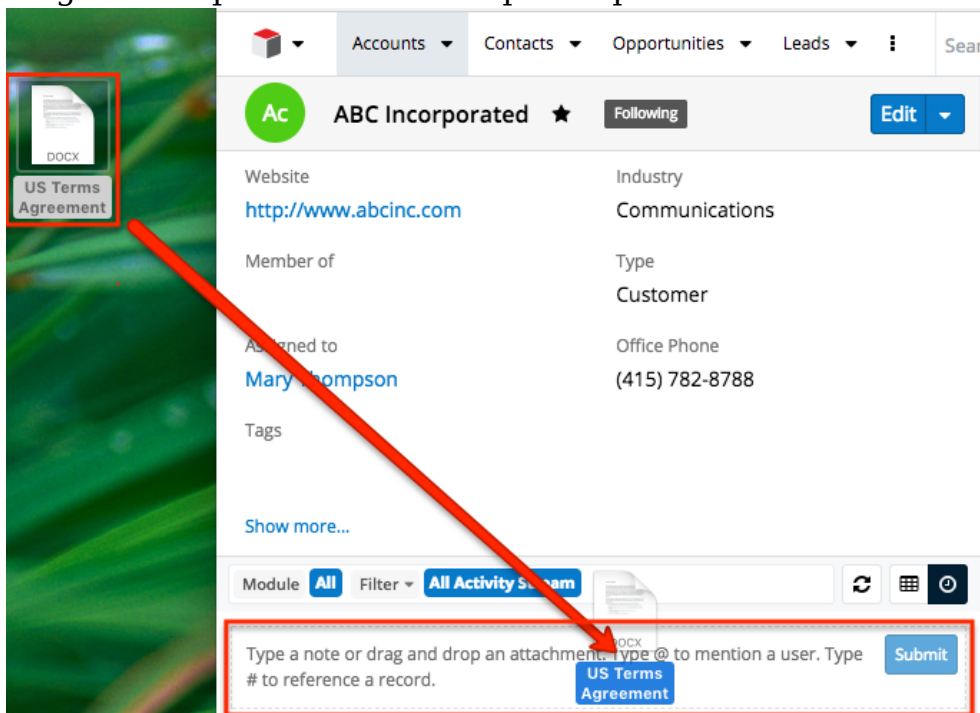


## Adding Attachments

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.

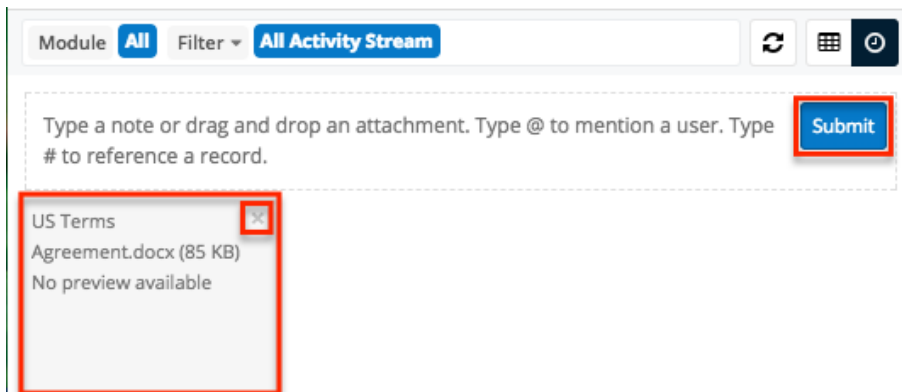
The following steps will cover adding a file from your desktop to the account record view's activity stream as an example:

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.

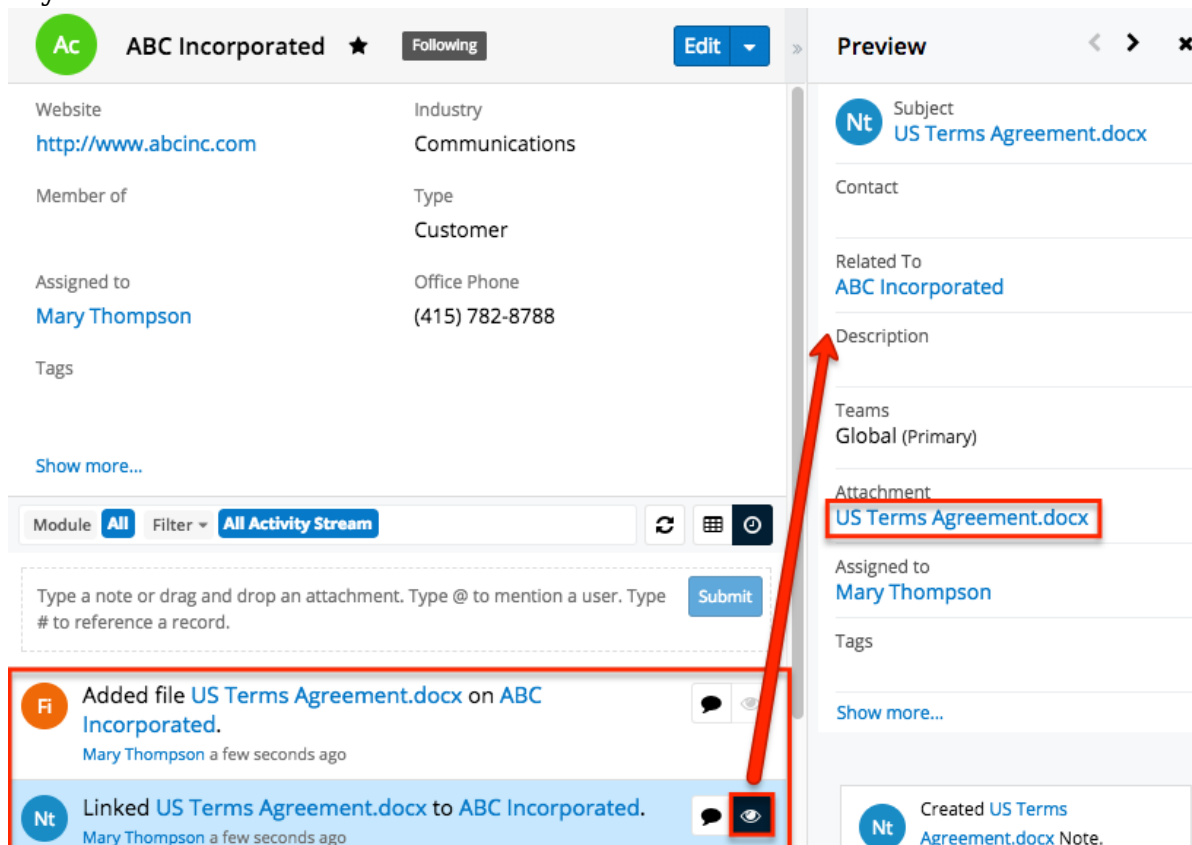


3. The attached file(s) will appear below the post input box. You may choose to enter a message simultaneously, which will appear as a separate comment-type post in the activity stream. To remove an attachment, click the

"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.



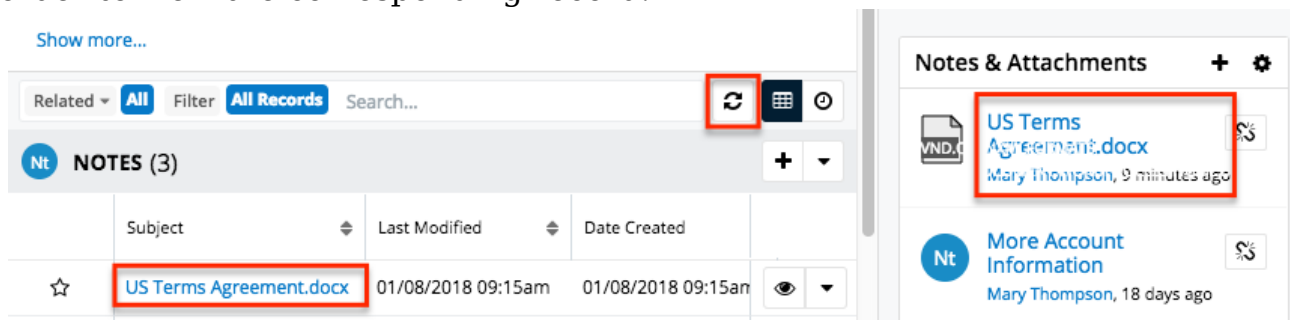
The newly created note record will appear in the Notes & Attachments dashlet in the account record view's intelligence pane as well as the related Notes subpanel. If the Notes & Attachments dashlet is not displayed in the intelligence pane, you can add the dashlet by editing the dashboard. For more information on adding

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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 and twitter feeds directly from Sugar dashlets into user posts. The Twitter dashlet appears in the intelligence pane to the right of the account's record view and allows users to view and access various feeds for specific twitter accounts related to the account you are currently viewing. Please note that administrators must first configure the Twitter connector in order for users to view twitter feeds. For more information on enabling connectors, please refer to the System documentation in the Administration Guide.

Users can add twitter feeds to user posts by clicking the timestamp (e.g. 44 minutes ago) for the specific twitter feed post then dragging and dropping the link that appears into the post input box. Click "Submit" to post the twitter feed link.



The screenshot shows the SugarCRM interface for a record named 'ABC Incorporated'. The record details include Website (http://www.abcinc.com), Industry (Communications), Type (Customer), and Office Phone ((415) 782-8788). The record is assigned to Mary Thompson. A Twitter feed is visible on the right, showing a tweet from SugarCRM (@SugarCRM) posted on 01/08/2018 at 09:00am, with a timestamp of '44 minutes ago' highlighted in a red box. The tweet text reads: 'The consumer of 2018 will expect a better customer experience. Learn how a CRM supports improved relationships:...' followed by a link to https://t.co/HNK62XvBTW. Below the tweet, there are options for Reply, Retweet, Favorite, and Create Case. In the activity stream below the record details, a similar tweet is shown with a timestamp of '44 minutes ago' also highlighted in a red box. A red arrow points from the tweet in the Twitter feed to the tweet in the activity stream. Another red arrow points from the '44 minutes ago' text in the activity stream to the text input field at the bottom of the page, which contains the instruction: 'Type a note or drag and drop an attachment. Type @ to mention a user. Type # to reference a record.' and a 'Submit' button.

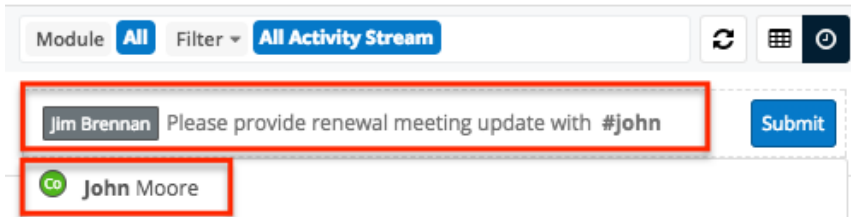
You can also add new feeds to your user post by dragging and dropping a specific news article from the RSS Feed dashlet. The RSS Feed dashlet can be added to the intelligence pane dashboard for the list view and record view. For more information on adding dashlets to the intelligence pane, please refer to the Dashboards and Dashlets documentation.

## Referencing Users and Records

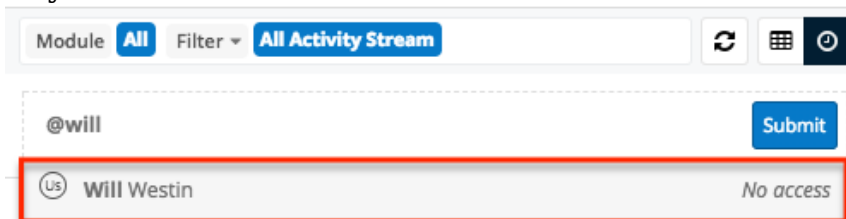
Sugar records and users can be referenced within the user post if you wish to target the message to a specific user or relate the post to a specific record. To mention a user in your post, type @ followed by the user's name (e.g. @John Smith). Please note that even if a specific user is referenced, all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



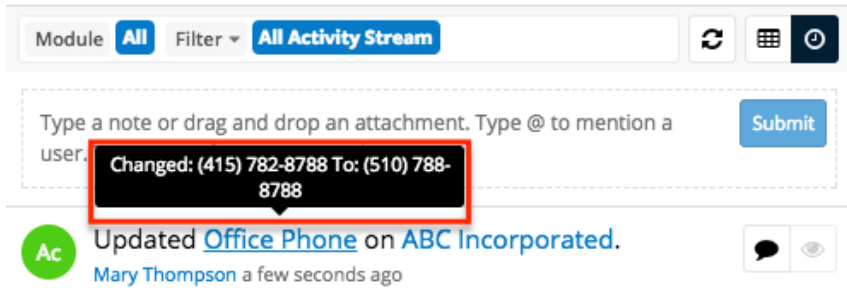
Please note that you cannot preview users or records referenced in the post as the preview is disabled. You will get an error message (Preview disabled: No data available) when you hover on the Preview button to the right of the post. For more information on previewing posts, please refer to the Previewing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



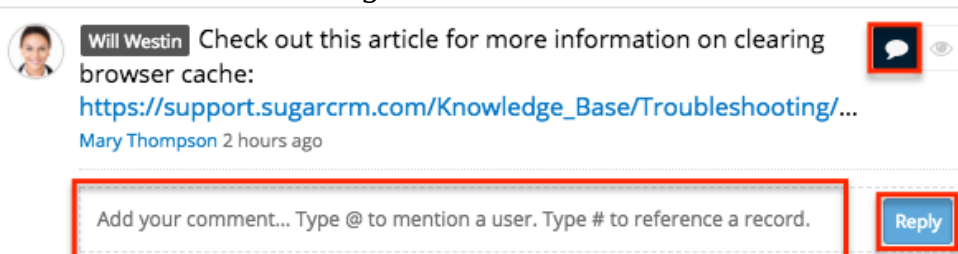


You will also be able to view the update post via the Home page and List View activity stream if you follow the record in Sugar. For more information on following records, please refer to the Following Records section.

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

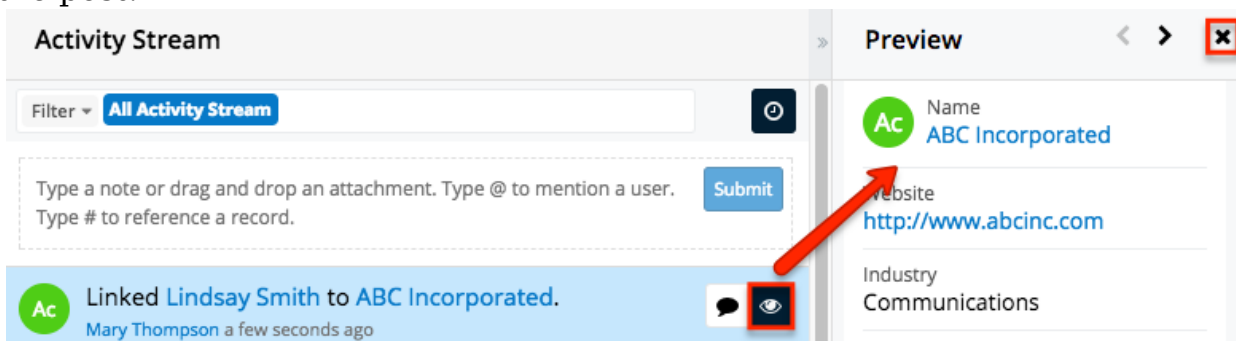
comment will appear on top and users can click the more comments link (e.g. 2 more comments...) to view all comments associated to the post. Once you click the link, all comments will display in cascading order with the most recent comments on top. To hide the comments again, simply refresh the activity 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

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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.

The screenshot displays a record view for 'ABC Incorporated'. At the top, there is a header with a green circle containing 'Ac', the name 'ABC Incorporated' (highlighted with a red box), a star icon, a 'Following' button, and an 'Edit' button with a dropdown arrow. Below the header, there are two columns of information: 'Website' (http://www.abcinc.com) and 'Industry' (Communications); 'Member of' and 'Type' (Customer); 'Assigned to' (Mary Thompson) and 'Office Phone' ((510) 788-8788); and 'Tags'. A 'Show more...' link is located below the information. Underneath is a navigation bar with 'Module Accounts', a 'Filter' dropdown set to 'All Activity Stream', and icons for refresh, grid, and search. Below the navigation bar is a text input area with a 'Submit' button and instructions: 'Type a note or drag and drop an attachment. Type @ to mention a user. Type # to reference a record.' Below the input area is an activity stream item: 'Updated Office Phone on ABC Incorporated' (with 'ABC Incorporated' highlighted in a red box) by 'Mary Thompson a few seconds ago'. A tooltip over the preview icon in this item reads 'Preview disabled: In view as current record'. The preview icon itself is also highlighted with a red box.

Last Modified: 2018-01-24 18:00:01

## 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

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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.



**Keyboard Shortcuts**

⚙
Close

SugarCRM enables power users to quickly perform certain tasks with keyboard shortcuts to increase productivity. The tables on the right describe available shortcuts along with the keys and the actions they perform.

Contextual Shortcuts	
Key	Function
t	Toggle sidebar
e, command+alt+i	Edit record
d, command+alt+d	Delete record
command+s, command+alt+a	Save record
esc, command+alt+l	Clear out any changes to the record
h	Open previous record
l	Open next record
f a	Mark record as favorite
f o	Follow record
shift+c, command+alt+u	Copy current record
m	Open primary action dropdown menu

Global Shortcuts	
Key	Function
s, command+alt+0	Focus on global search field
c	Toggle the quick create menu
?	Show shortcuts help page
command+shift+space	Toggle the Sweet Spot bar

Ac
XY&Z Funding Inc
☆
Follow

Accounts Reco...
☆

☐ Mobile
Shortcuts
🗨 Feedback
🔍 Help

## 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

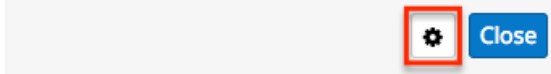
h	h	Open the previous record
l	l	Open the next record
m	m	Open the record's Actions menu
shift+c, ctrl+alt+u	shift+c, cmd+alt+u	Copy the current record
t	t	Toggle the Right Hand Side drawer

## 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.



Global Shortcuts	
Key	Function
s, command+alt+0	Focus on global search field

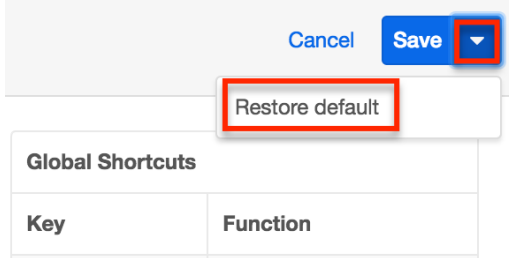
3. Update the Key value you want to change in the Contextual Shortcuts table.

Contextual Shortcuts		Global Shortcuts	
Key	Function	Key	Function
t	Toggle sidebar	s,mod+alt+0	Focus on global search field
e,mod+alt+i	Edit record	c	Toggle the quick create menu
d,mod+alt+d	Delete record	?	Show shortcuts help page
mod+shift+s,mod	Save record	mod+shift+space	Toggle the Sweet Spot

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.

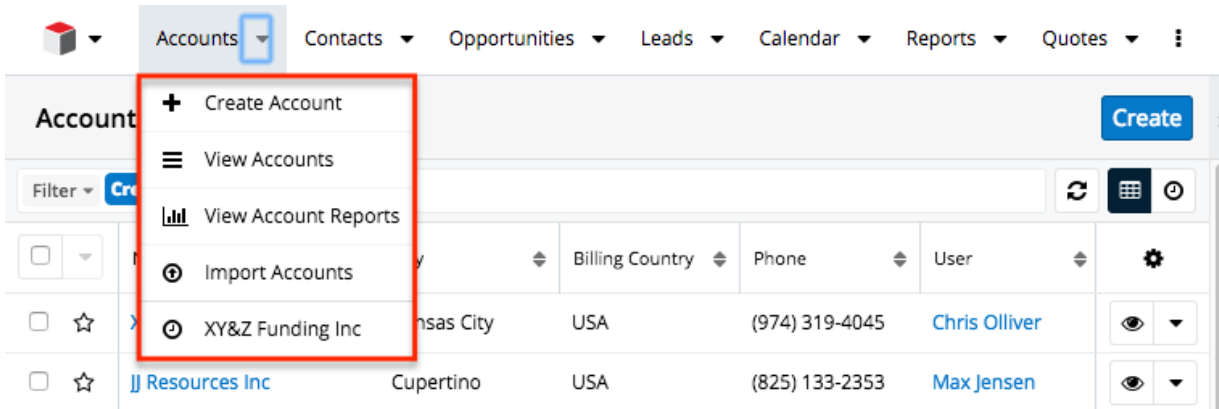
If you ever wish to revert all of your custom key combinations, click the "Restore default" option in the actions menu.



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

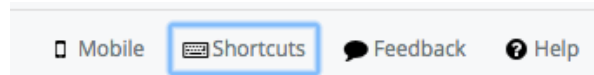
Using the Tab key (Alt+Tab for Safari browser) on your keyboard enables you to easily navigate through Sugar's navigation bar which spans across the top of the screen. Please note that the default tab order is from left-to-right. As you hit the Tab key, each option (e.g. home, module tabs, global search, 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

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perform a specific action (e.g. create a record, open the actions menu, etc.) on the list view. The tab will go through all of the currently displayed records on the list view then move onto the intelligence pane and footer before going back to the navigation bar again. Please note that each link (e.g. Mobile, Shortcuts) in Sugar's footer will be highlighted as you tab from left-to-right. Simply hit "Enter" on your keyboard if you wish to access any of the links on the footer.



## Tabbing in Global Search

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

Last Modified: 2017-12-21 18:59:02

## Dashboards and Dashlets

### Overview

Sugar dashlets allow users to build specific data, insights, and useful visualizations into their Sugar views. Dashlets live within dashboards which 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.

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## 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 two ways, with each way offering different functionality. 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 includes their dashboards and will be referred to "dashboards in views". The Dashboards in Views section of this page details the actions you can take when using dashboards in views.

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 teams 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 each of the user's teams. For more information, please refer to the Private Teams and

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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. Refer to the Sharing Dashboards With Teams section below for more information. 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. This has two main benefits. First, it allows them to use the shared dashboard as a starting point for personalizing the dashlets to suit their particular needs. Second, duplication is often necessary when the shared dashboard includes a List View dashlet. The List View dashlet displays a filtered list of records and includes a default filter when it is first created. If a different filter has been applied and its containing dashboard is shared amongst several users, the dashlet will not return results. In this case, the user should duplicate the shared dashboard, rename the dashboard, and edit the List View dashlet to build their own filter. For more information, refer to the Duplicating Dashboards section.

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## 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, 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

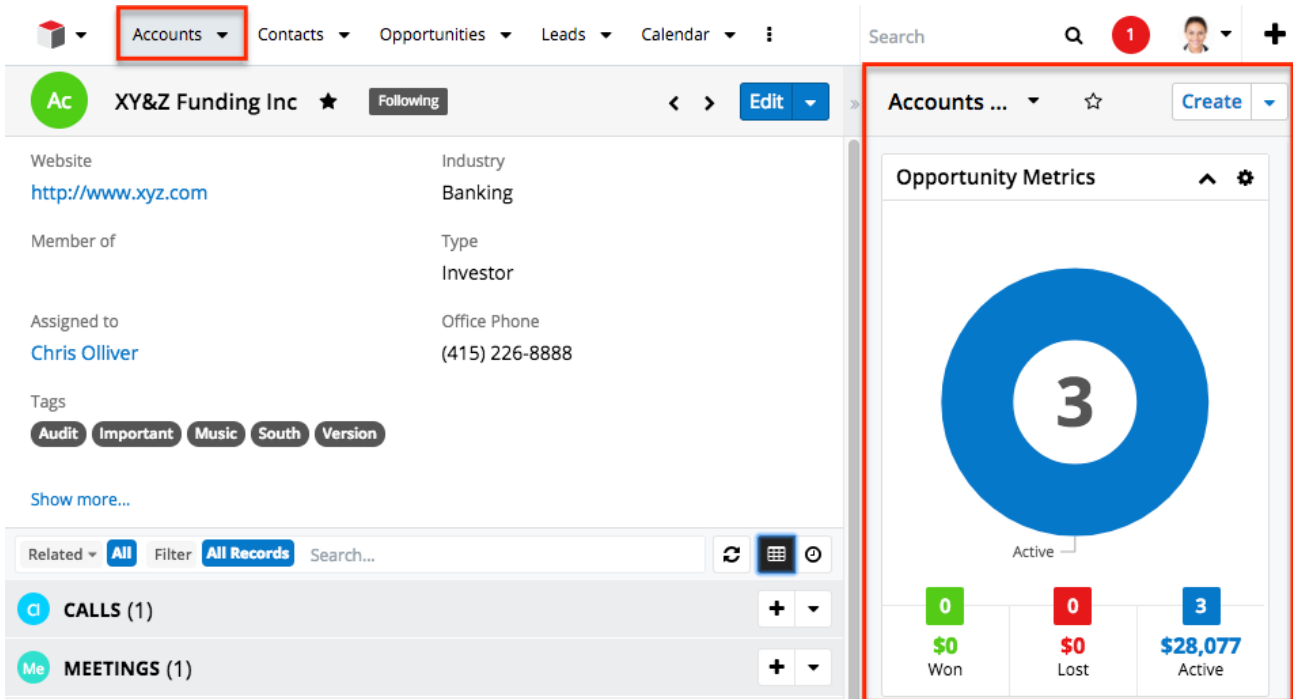
It is important that admin users not treat these default dashboards like personal dashboards. So long as the Default Dashboard field remains checked, any changes made to the dashboards will be pushed to all users belonging to the associated team(s). Since the Global team is automatically selected, changes 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.

## Using Dashboards and Dashlets

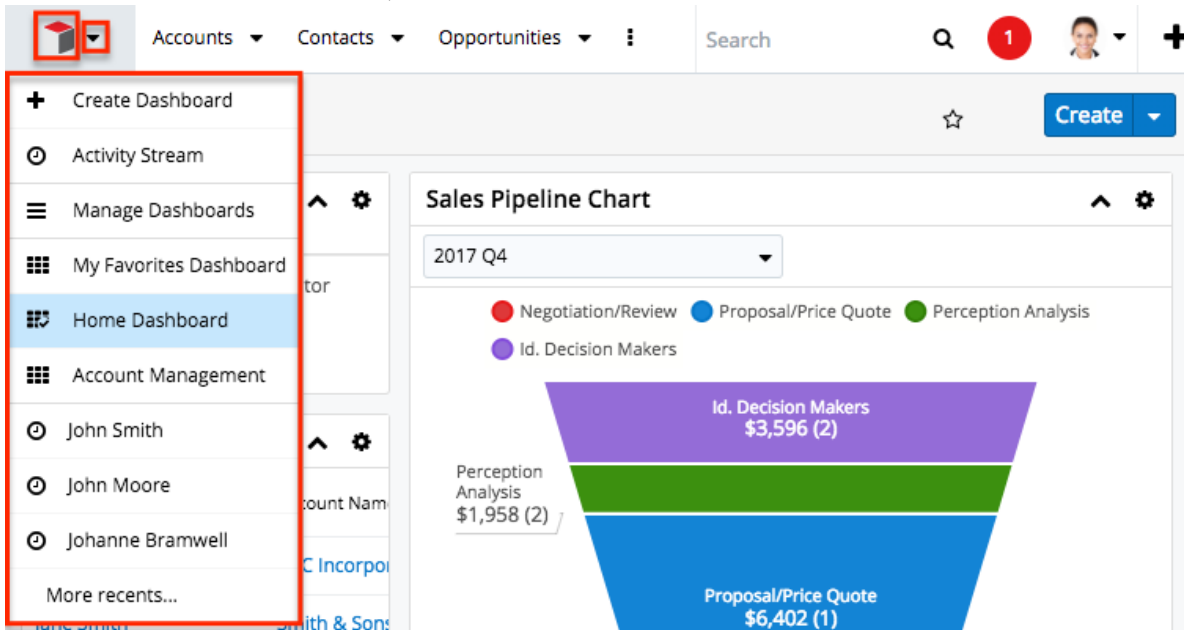
Dashboards with their dashlets are available on the list view and record view of Sidecar modules. For example, to access the Accounts record view dashboards, click the Accounts tab in Sugar's header. Then, click one of the account names that appears to open its record view. Ensure the intelligence pane 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.

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However, the dashboard's layout and dashlets are not visible via the Dashboards module. For more information, refer to the Managing Dashboards section.

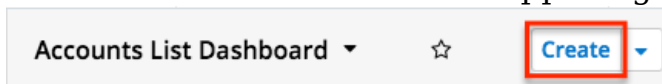
## Creating Dashboards

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

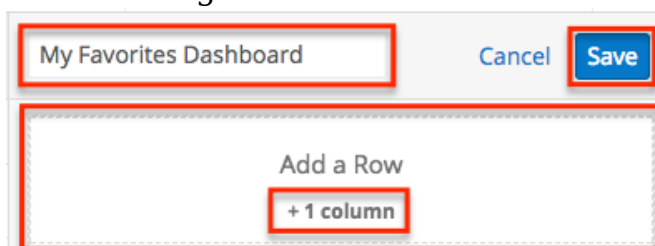
Users can create dashboards in list view and record view intelligence panes as well as on the Home page. By default, new dashboards will be assigned to the creating user with the Teams field set to the creating user's private team. The dashboard will also be automatically designated as a favorite so 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.



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.



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

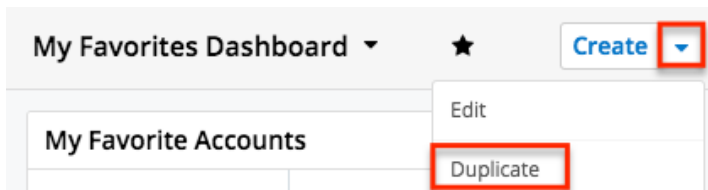
## Duplicating Dashboards

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

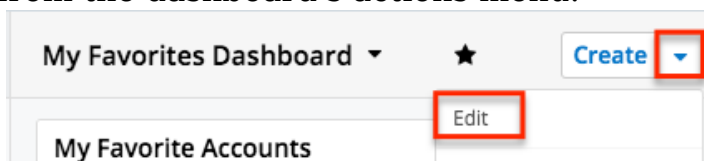
Duplication is recommended when a you wish to personalize a shared dashboard. By making your changes to your own, private copy, the original dashboard will not be affected for other users. Additionally, dashboards can only be edited by their Assigned To user and admin users. Creating a copy of a shared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

To create a copy of a dashboard, simply select the Duplicate option from the dashboard's actions menu.



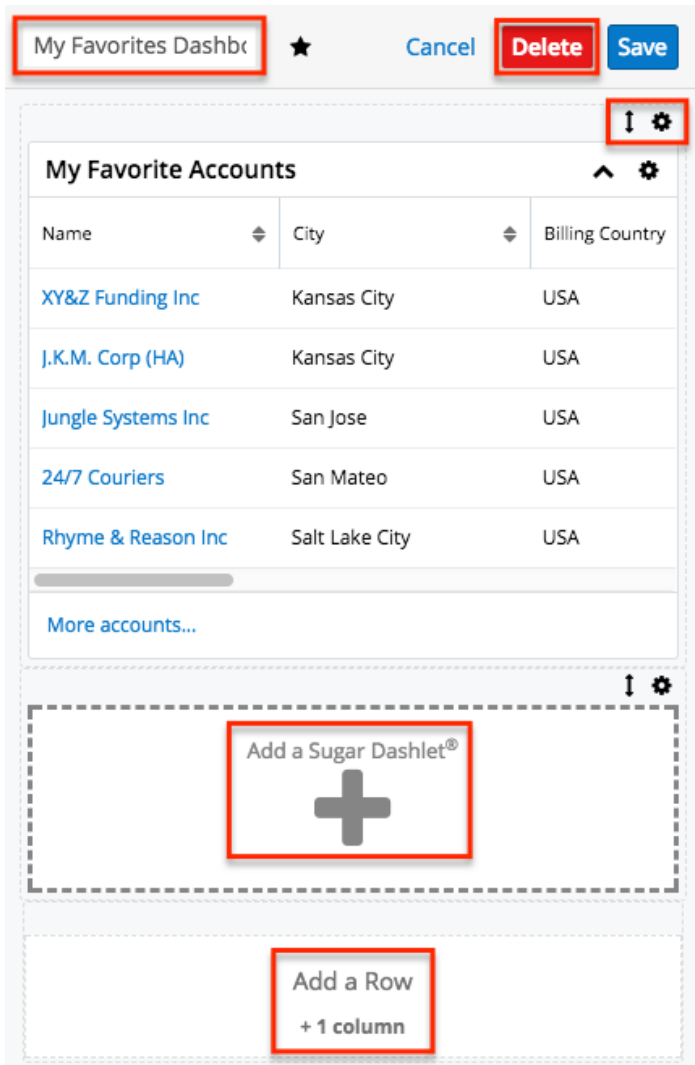
## Editing Dashboards

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's 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.

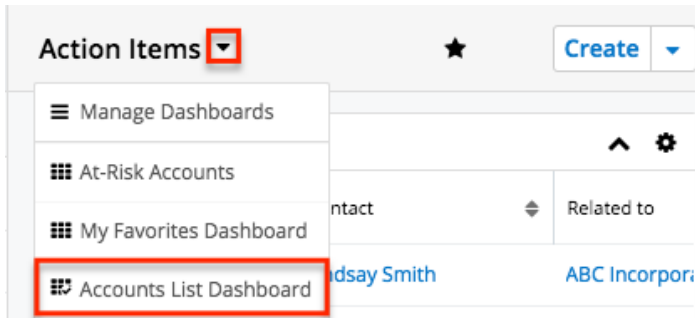
## Switching Between Dashboards

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

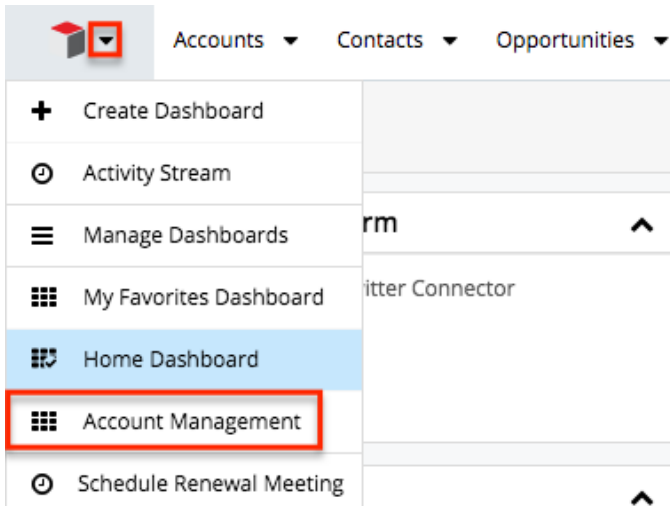
Between default dashboards, shared dashboards, and personal dashboards, users may have multiple dashboards active for a single Sugar view (e.g. Accounts list view). The dashboards selection list contains all of the user's active and default dashboards for the particular view and allows for switching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

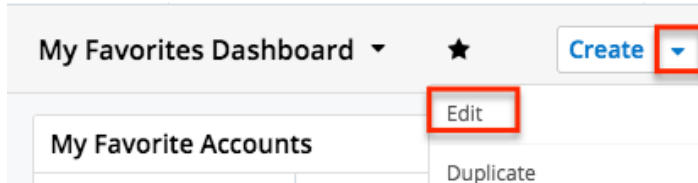
Note: If a shared dashboard is no longer needed by its owner or the dashboard owner will no longer be using Sugar, the dashboard can be reassigned, either by

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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".



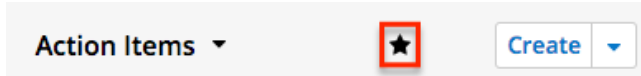
2. Click the Delete button on the upper right of the dashboard and click "Confirm" to finalize the deletion.



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

## Removing Dashboards From Views

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



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

## Adding Dashlets

Users can add 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



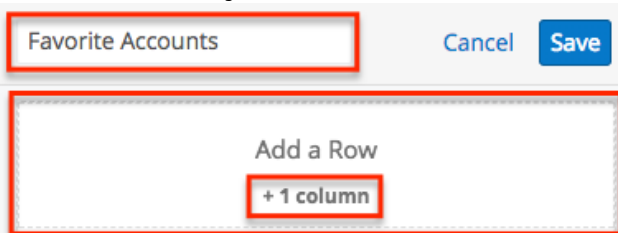
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update the dashboard for all users.

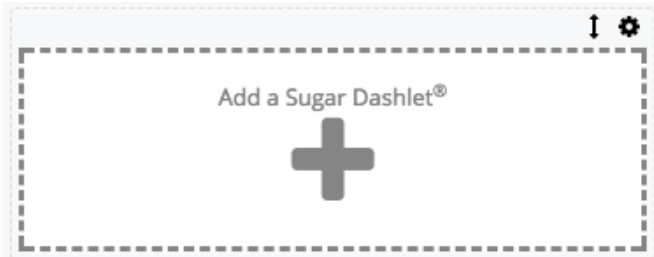
With your new dashboard in edit mode, use the following steps to add a new dashlet in the Accounts list view intelligence pane as an example:

1. Click "+ 1 column" in the Add a Row box.

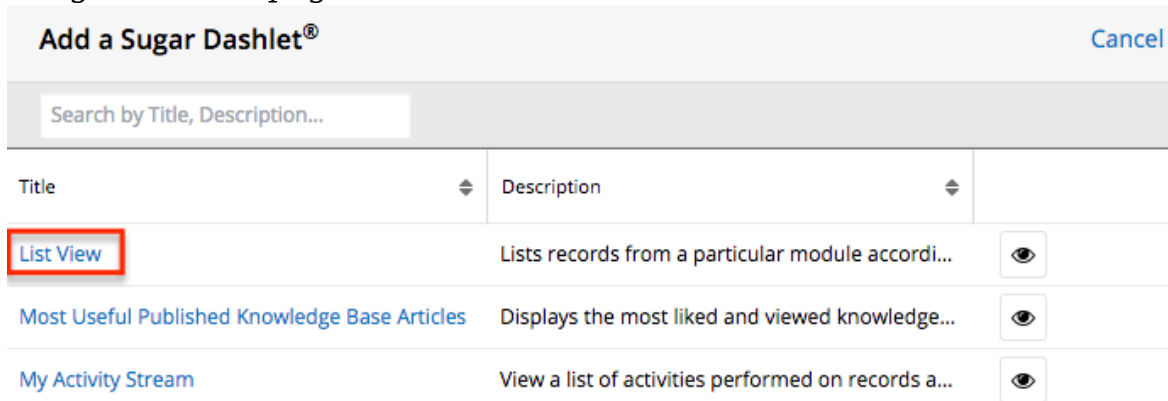
Note: Dashboards on the Home page may offer 1 to 3 columns depending on the selected layout.



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



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



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



My Favorite Accounts  Cancel

Module  
Accounts

Columns  
Name City Billing Country Phone User Email Address Date Modified  
Date Created

Display Rows 5 Auto Refresh Select..

Default Data Filter

Filter My Favorites

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

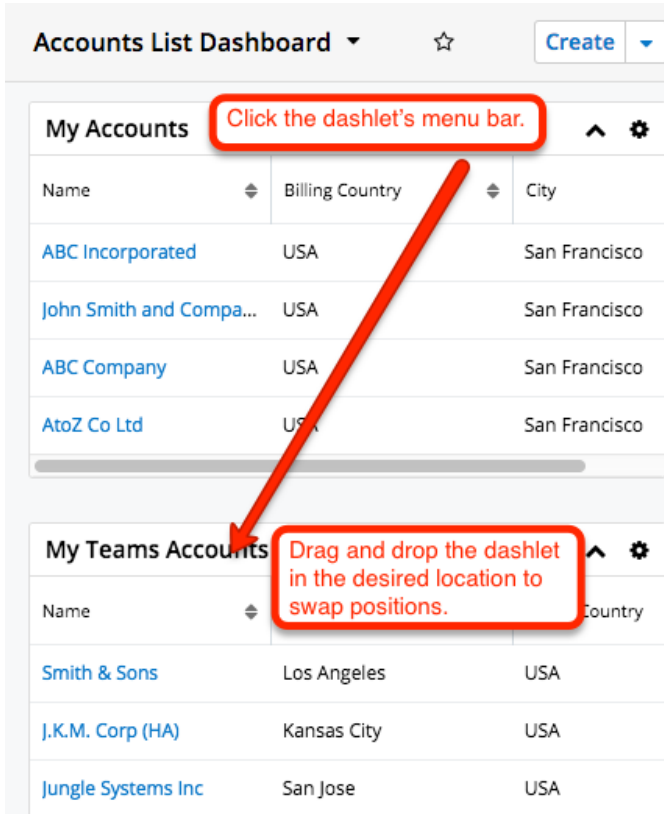
Favorite Accounts  Cancel

My Favorite Accounts	
Name	City
<a href="#">XY&amp;Z Funding Inc</a>	Kansas City
<a href="#">J.K.M. Corp (HA)</a>	Kansas City
<a href="#">Jungle Systems Inc</a>	San Jose

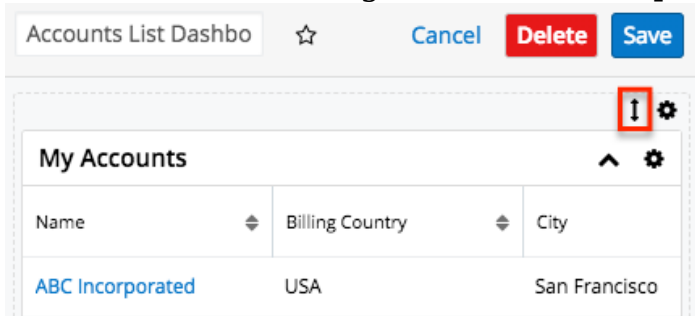
## Rearranging Dashlets

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.

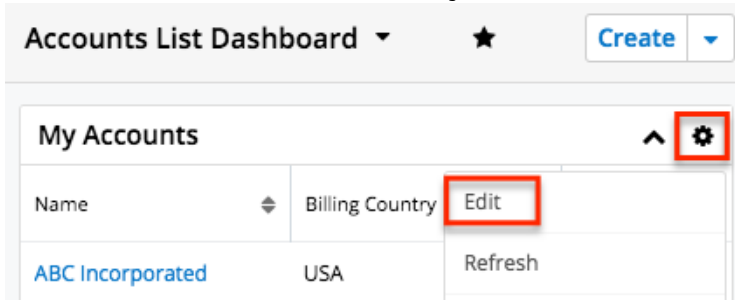


Note: A dashboard and its dashlets may only be edited by the dashboard's Assigned To user and system admin users. Any change to a shared dashboard will update the dashboard for all users.

## 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

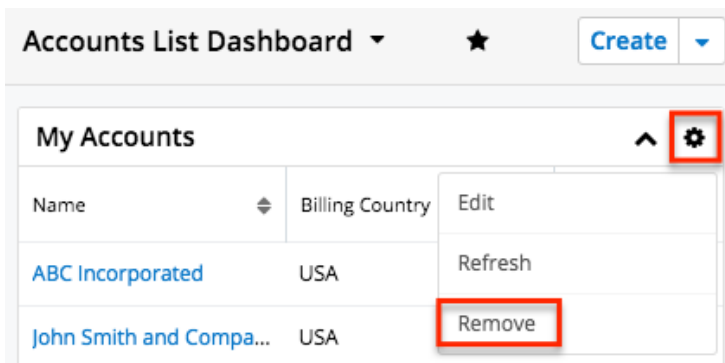
them, refer to the Commonly Used Dashlets section.



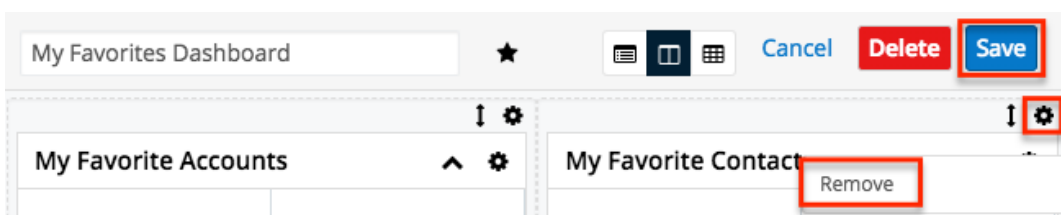
Note: Dashlet Gear menus, including the Edit option, are only available to the containing dashboard's Assigned To user and system admin users. Any change to a shared dashboard will update the dashboard for all users.

## 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".



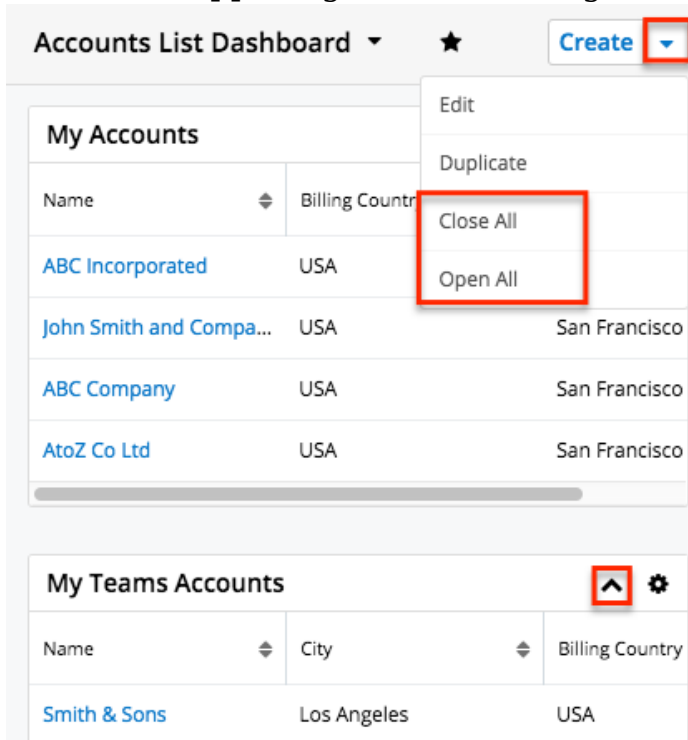
Note: Dashlet Gear menus, including the Delete option, are only available to the containing dashboard's Assigned To user and system admin users. Any change to a

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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".



The screenshot shows the 'Accounts List Dashboard' interface. At the top, there is a 'Create' button with a dropdown arrow. Below it, a context menu is open, listing 'Edit', 'Duplicate', 'Close All', and 'Open All'. The 'Close All' and 'Open All' options are highlighted with a red box. The dashboard contains two sections: 'My Accounts' and 'My Teams Accounts'. 'My Accounts' is a table with columns for Name, Billing Country, and City. It lists five accounts: ABC Incorporated, John Smith and Compa..., ABC Company, and AtoZ Co Ltd, all with Billing Country USA and City San Francisco. 'My Teams Accounts' is a table with columns for Name, City, and Billing Country. It lists one account: Smith & Sons, with City Los Angeles and Billing Country USA. A red box highlights the up arrow icon in the top right corner of the 'My Teams Accounts' section.

Name	Billing Country	City
ABC Incorporated	USA	San Francisco
John Smith and Compa...	USA	San Francisco
ABC Company	USA	San Francisco
AtoZ Co Ltd	USA	San Francisco

Name	City	Billing Country
Smith & Sons	Los Angeles	USA

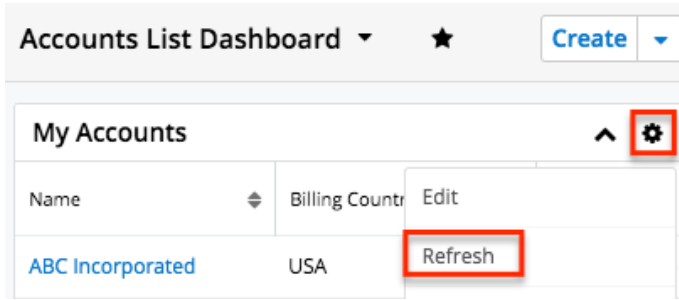
## Refreshing Dashlets

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 inbetween page loads, the dashlets themselves must be refreshed. Dashlet refreshes can be performed manually or automatically.

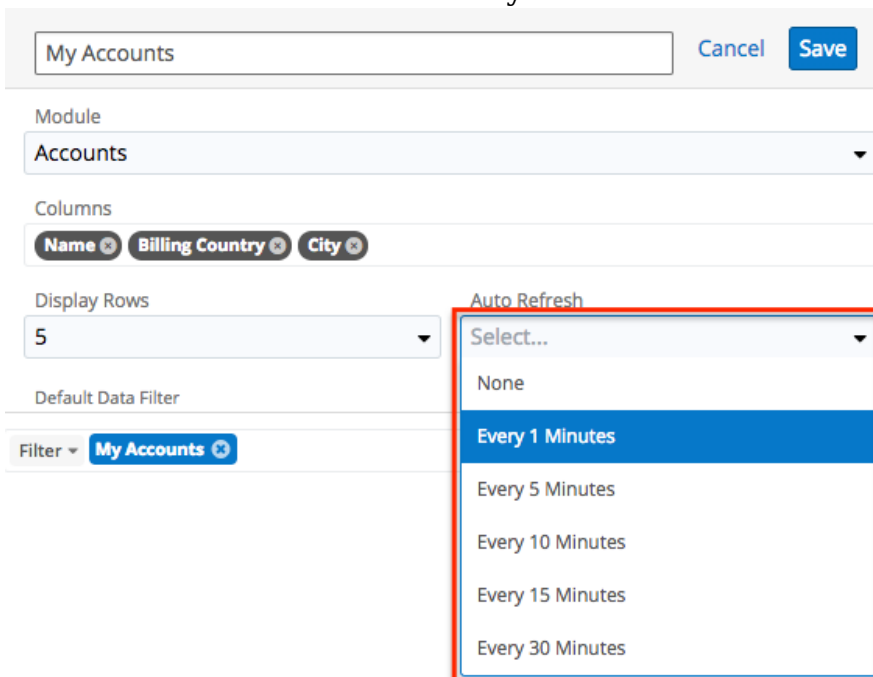
Users can manually refresh a dashlet by clicking the Gear icon at the top of the dashlet menu bar then selecting "Refresh".







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.

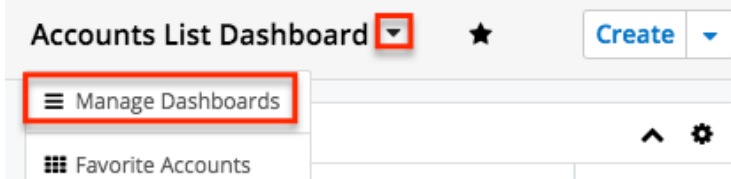
## Managing Dashboards

The Dashboards module consists of dashboard records visible in the Dashboards list view and Dashboards record view. Please note that when viewing dashboards 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, and reassign dashboards. Admin users are also able to push dashboards to the views of teams of users.

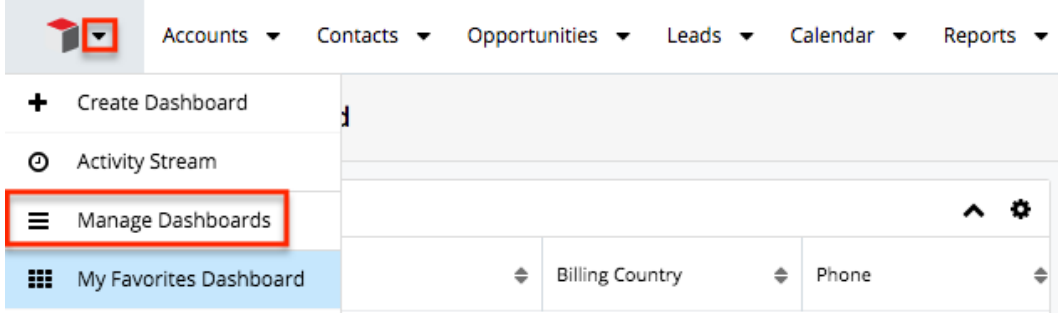
The Dashboards module can be accessed from any record view or list view intelligence pane or from the Home module. Simply select "Manage Dashboards"

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 they were originally created. For more information, refer to the Shared Dashboards section above.

## Dashboard Module Fields

The Dashboards module includes the following fields:

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 who's 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.

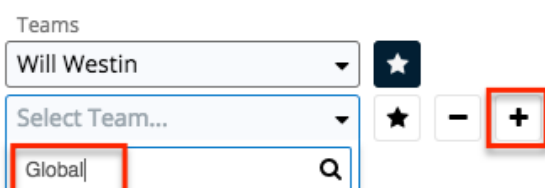
	<p>Note: The Dashboards list view and record view includes information about the dashboard but does not display the dashboard's dashlets. Dashboards including their dashlets are visible in intelligence panes and the Home page as described in the Dashboards in Views</p>
<p>Searching for Dashboards List View Search Creating a Filter Saving a Filter</p>	<p>The Searching for Records section provides an introduction to list view search, which searches and filters within the Dashboards module.</p>
<p>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</p>	<p>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.</p> <p>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.</p>
<p>Dashboards Record View Favorite Designation Next or Previous Record Show More</p>	<p>The Record View section walks through the many elements of the Dashboards Record View layout which contains detailed information about a single dashboard record.</p> <p>Note: The Dashboards list view and record view includes information about the dashboard but does 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</p>
<p>Editing Dashboards Editing Inline via Record View Editing via Record View Editing Inline via List View Mass Editing via List View Editing Fields</p>	<p>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. The Editing Fields section provides</p>

	instructions for modifying the different field types available in Sugar records.
Deleting Dashboards Deleting via Record View Deleting via List View Mass Deleting via List View	<p>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.</p> <p>Dashboards can also be deleted when viewing them in your intelligence pane or Home page as described in the Deleting Dashboards section below.</p>
Favoriting Dashboards Favoriting via List View Favoriting via Record View	<p>The Favoriting Records section describes the various methods of marking dashboards as favorites, including via the Dashboards list view and record view.</p> <p>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.</p>

## 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



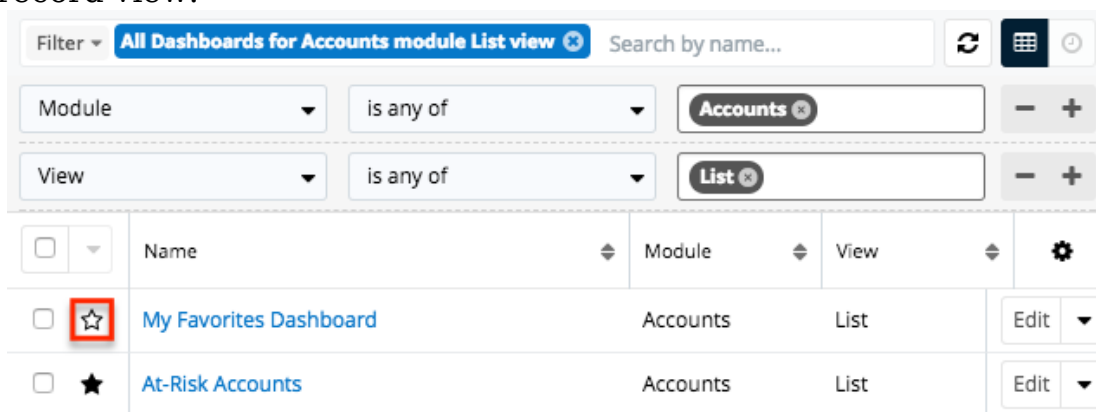
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Once a dashboard has been shared with multiple users via the Teams field, those users can then favorite the dashboard to make it visible in their own views. Alternatively, an admin user can check the Default Dashboard field to push the dashboard to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

## Pulling Dashboards to Your Views

When a user wishes to use a dashboard which 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.

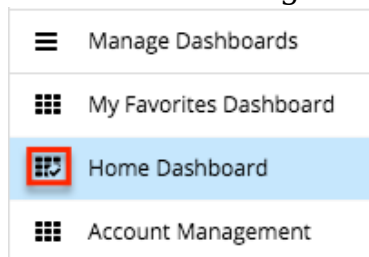
Once a dashboard is a favorite and is available for use, it can be un-marked as a favorite from the Dashboards module or directly from the relevant view in order to remove it from that view's dashboard selection list. Dashboards an admin has marked as default will appear in your views regardless of being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



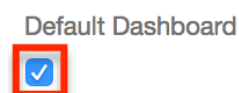
## Pushing Dashboards to Teams

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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 check mark on the standard dashboard icon when viewing them in the selection list on views.



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

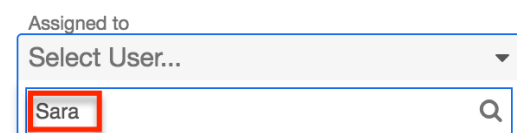


Sugar includes out-of-the-box default dashboards which automatically have "Default Dashboard" checked. Refer to the Out-of-the-Box Default Dashboards section for more information.

## 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 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.



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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.

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 which 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 pre-defined or custom filters, etc. Please note that any changes made by the administrator to the List View layout in Studio affects the list of available fields in the module's list view dashlet layout. The deployed changes will not display



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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 which 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
- 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 screenshot shows the configuration interface for a list view dashlet. At the top, there is a text input field containing "My Accounts", with "Cancel" and "Save" buttons to its right. Below this is a "Module" dropdown menu set to "Accounts". The "Columns" section displays a row of buttons for "Name", "City", "Billing Country", "Phone", "User", "Email Address", and "Teams", each with a small "x" icon to its right. Below these are two more buttons: "Date Modified" and "Date Created". The "Display Rows" dropdown is set to "5", and the "Auto Refresh" dropdown is set to "Select...". At the bottom, the "Default Data Filter" section shows a "Filter" dropdown menu with "My Accounts" selected and a refresh icon to its right.

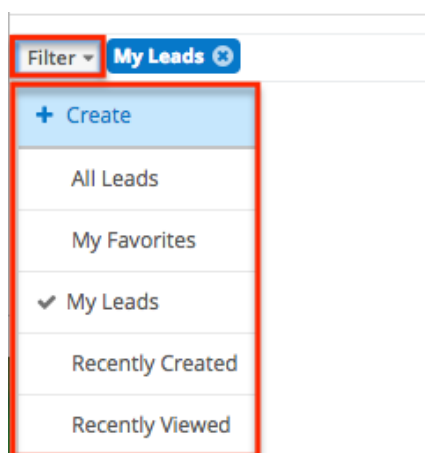
## Creating a Filter

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The Filters section of the Configuration Options page allow 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

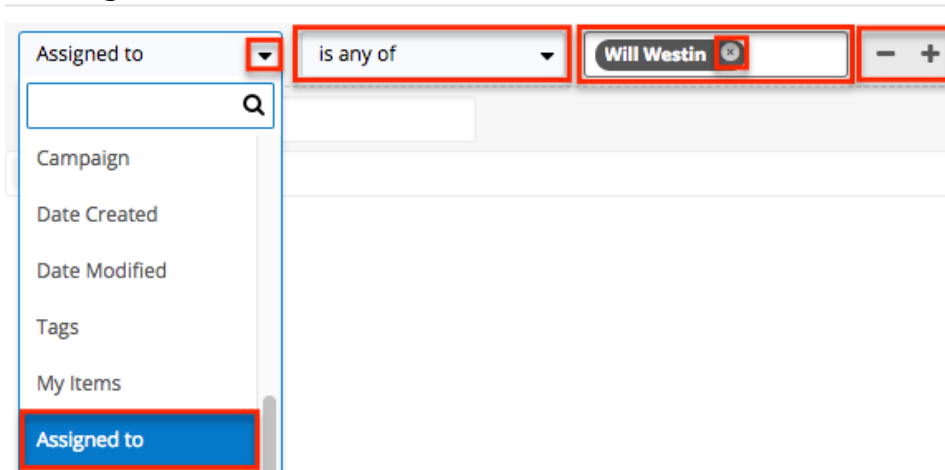


Users can also create new filters via the Create option in the Filter list. This allows users to add custom, complex filter options when filtering the List View dashlet. You have the option to add multiple fields to your new filter by clicking the Plus button to the right of the filter selection dropdown lists. Please note that each one of the filter's criteria need 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.

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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 information they wish to view via the display options and filters available in the Configuration Options page.

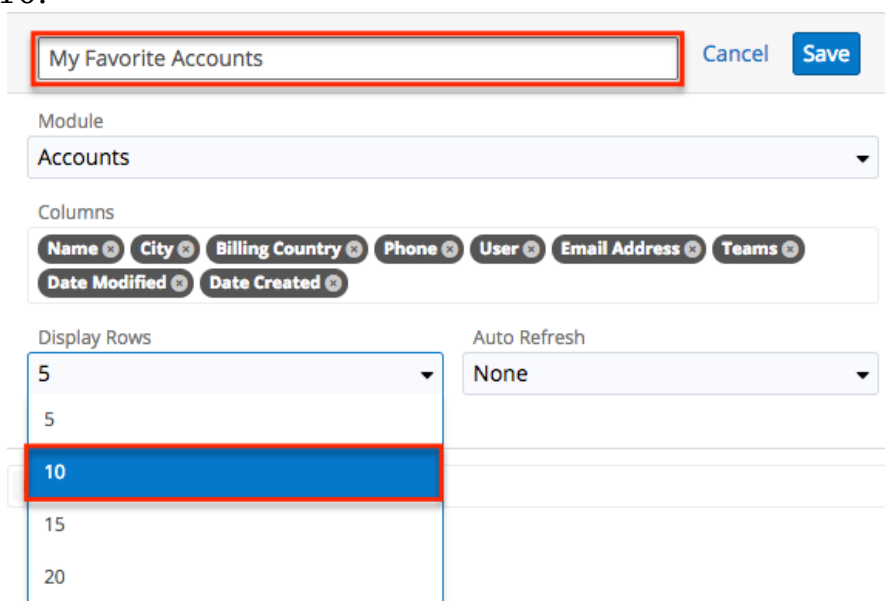
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The following steps cover updating the title, display rows, columns, and only my favorites filter for the My Accounts dashlet as an example:

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.
  - o 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.



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Cancel Save

Module  
Accounts

Columns  
Name City Billing Country Phone User Email Address Teams  
Date Modified Date Created

Display Rows: 10 Auto Refresh: None

Default Data Filter  
Filter My Accounts

Q  
+ Create  
Sarah's Accounts  
All Accounts  
✓ My Accounts  
My Favorites

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.





My Favorite Accounts			
Name	City	Billing Country	Phone
<a href="#">XY&amp;Z Funding Inc</a>	Kansas City	USA	(415) 226-8888
<a href="#">J.K.M. Corp (HA)</a>	Kansas City	USA	(375) 275-8268
<a href="#">Jungle Systems Inc</a>	San Jose	USA	(374) 315-6162
<a href="#">24/7 Couriers</a>	San Mateo	USA	(382) 239-7069
<a href="#">Rhyme &amp; Reason Inc</a>	Salt Lake City	USA	(976) 271-6285
<a href="#">Hammer Group Inc</a>	Alabama	USA	(470) 909-5308
<a href="#">Powder Suppliers</a>	Alabama	USA	(220) 464-3066
<a href="#">DD Furniture Inc</a>	Cupertino	USA	(026) 864-7290
<a href="#">Dirt Mining Ltd</a>	Denver	USA	(860) 954-1279
<a href="#">Rubble Group Inc</a>	Alabama	USA	(563) 138-2457

[More accounts...](#)

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.

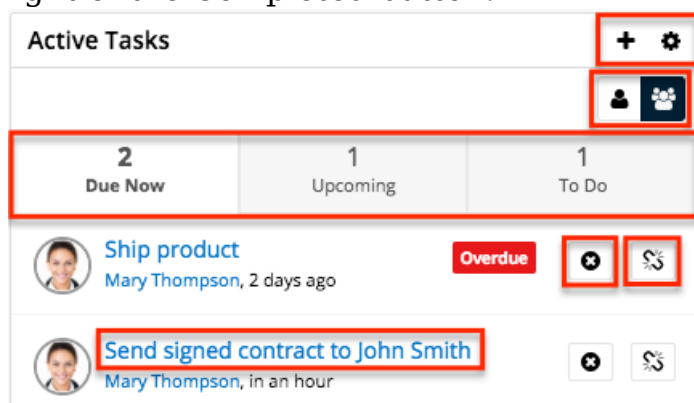
My Favorite Accounts			
Name	City	Billing Country	Edit
<a href="#">XY&amp;Z Funding Inc</a>	Kansas City	USA	Refresh
<a href="#">J.K.M. Corp (HA)</a>	Kansas City	USA	Remove
<a href="#">Jungle Systems Inc</a>	San Jose	USA	(374) 315-6162

## Active Tasks Dashlet

The Active Tasks dashlet allows users to view outstanding tasks that require attention and need to be completed on a future or current date. 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. To view tasks that are due on the current date, simply click the Due Now tab and any tasks that are currently due will be listed. Please note that any open tasks where the due date is prior to the current date will also display under this

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tab with an Overdue status in red. The Upcoming tab displays all tasks that have a due date in the future. The To Do tab will display tasks that have no due date set. If a task only has a start date defined but no due date, then it will appear under the To Do tab. You can also 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.

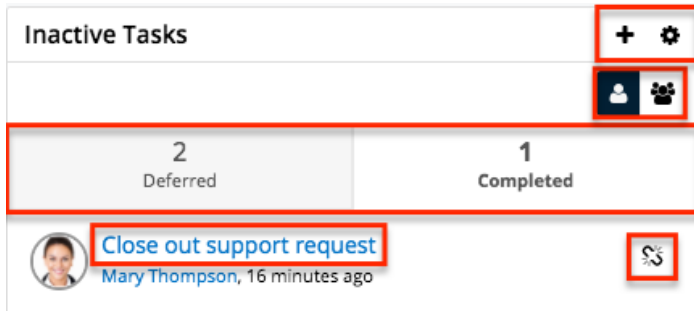


To access a task's record view, simply click the task's subject in the dashlet. There are two buttons on the upper right of the dashlet which allow you to toggle between viewing tasks assigned to you and all tasks to which you have access. You can click the one person button to quickly view task records 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. You can delete the task's relationship with the record by clicking the Unlink button on the task's row.





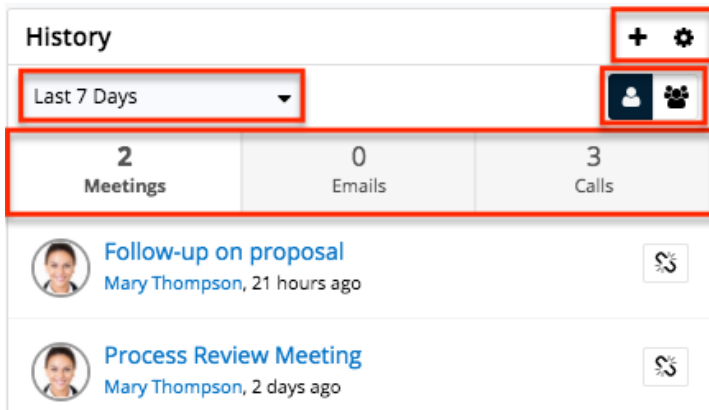
To access a task's record view, simply click the task's subject in the dashlet. There are two buttons on the upper right of the dashlet which allow you to toggle between viewing tasks assigned to you and all tasks to which you have access. You can click the one person button to quickly view task records 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 displays a number on each tab to indicate 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 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 displays a number on each tab to indicate 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.

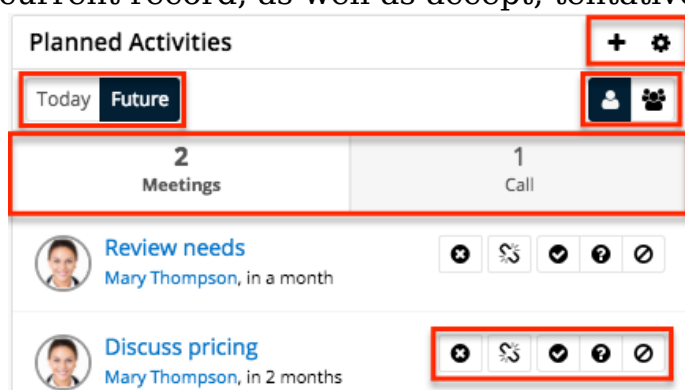
In addition, there are two buttons to the right which allow you to toggle between viewing the record's scheduled activities assigned to you and activities assigned to users in other teams. Please note that you can use both sets of buttons (Today, Future, one person, multi-group) concurrently to further 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.

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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 are 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

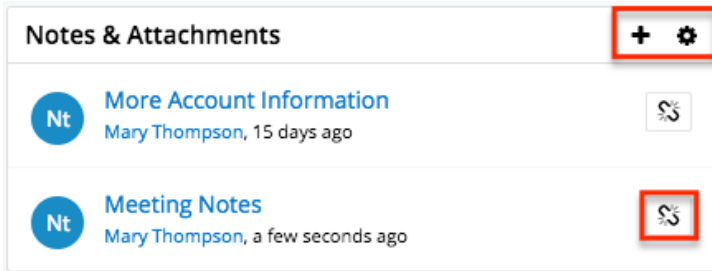
The Notes & Attachments dashlet allows users to relate an existing note as well as a new note record to the module record. To create a new note, click the Plus icon on the upper right of the Notes & Attachments dashlet then select "Create Related Record". Once the Notes record view layout opens, enter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



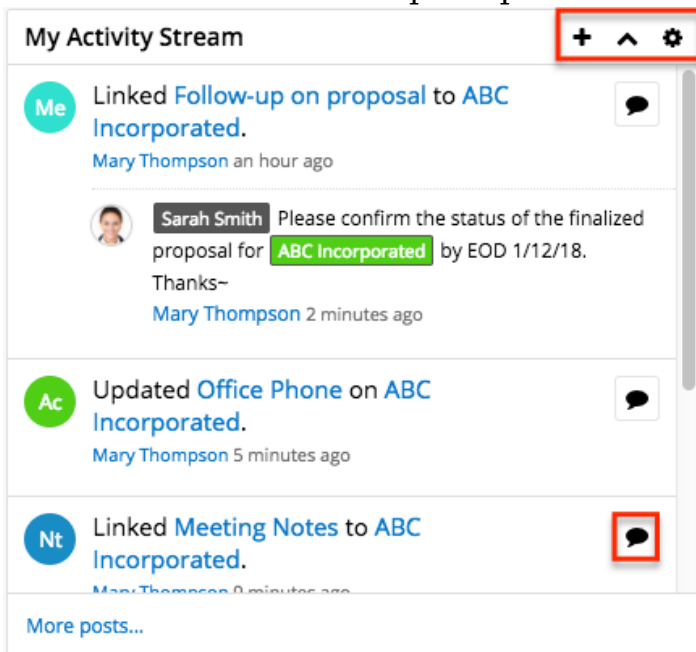




## My Activity Stream Dashlet

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.

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.

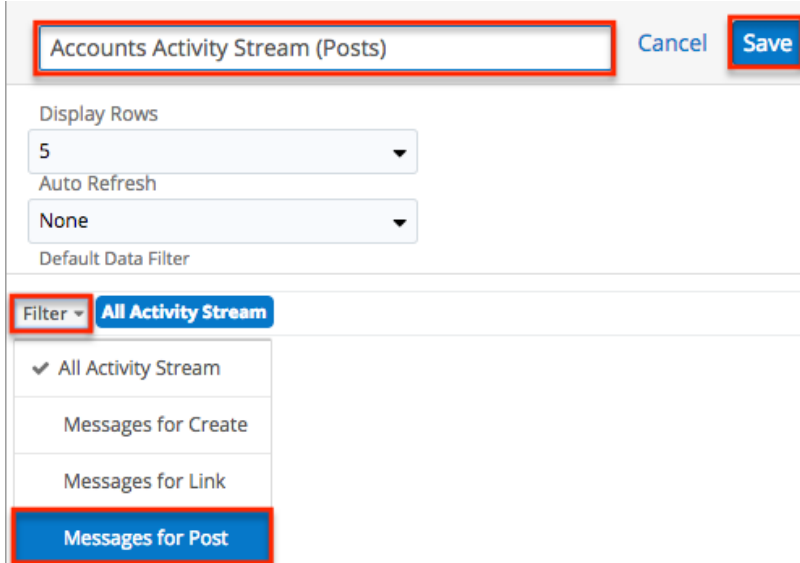


When added to an Intelligence Pane, the My Activity Stream dashlet will display stream items in context to the data within the main container of the page. For example, if you add the dashlet to a dashboard on the main Accounts module page, the main container of the page contains the Accounts list view. 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

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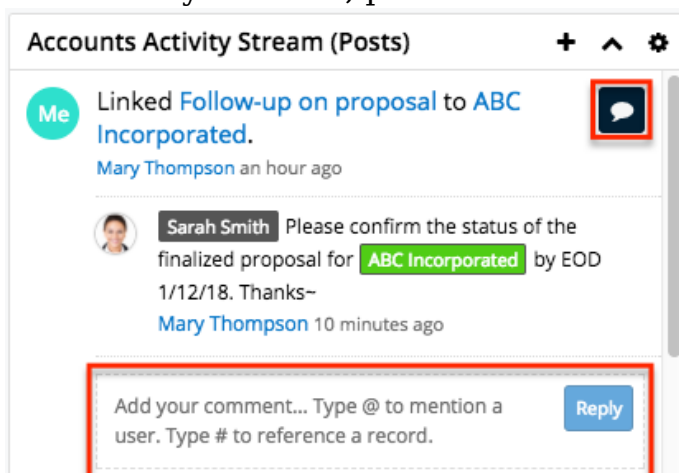
restrict activity stream items to only those activities related to the Opportunities module. If the My Activity Stream dashlet is added to any record view's Intelligence Pane dashboard, the dashlet will restrict activity stream items to only those activities related to the record displayed in the main 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.

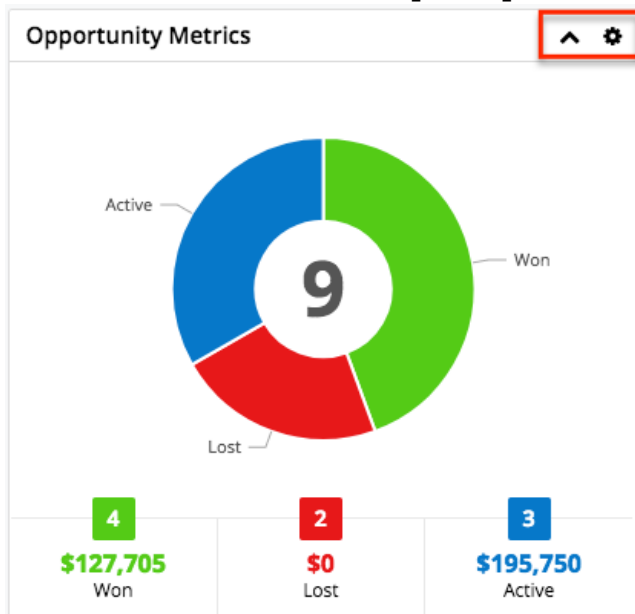


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## Opportunity Metrics Dashlet

The Opportunity Metrics dashlet appears in the intelligence pane of the Accounts record view. It provides information regarding opportunities associated to the account that are won, lost, and active along with the relevant dollar amounts. The donut chart within the dashlet shows the breakdown of the opportunities by status and displays the total count of opportunities associated to the current record you are viewing. The chart is color coded based on the chart key to represent the won, lost, and active opportunity status.

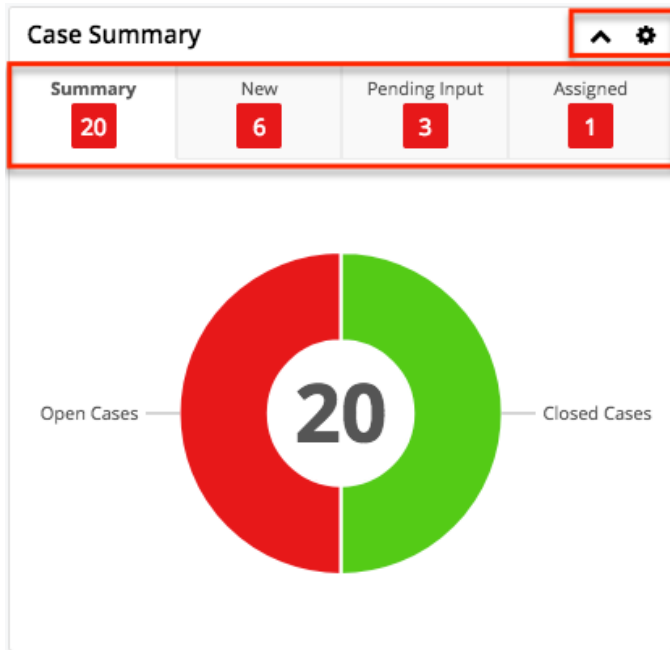
The Gear icon on the upper right of the dashlet allows you to edit, refresh, and remove the dashlet accordingly. To collapse the dashlet, click the Up arrow to the left of the Gear icon. To open up the dashlet, you can simply click the arrow again.



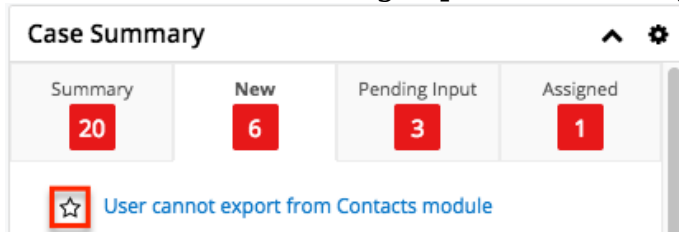
## Cases Summary Dashlet

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 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 associated to the current record. The Assigned tab displays a list of all open cases associated 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).

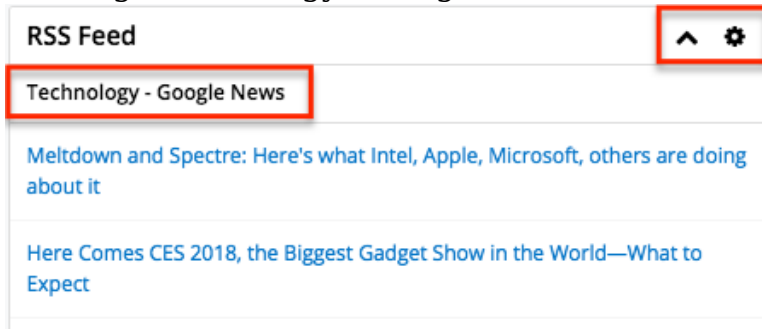


## RSS Feed Dashlet

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

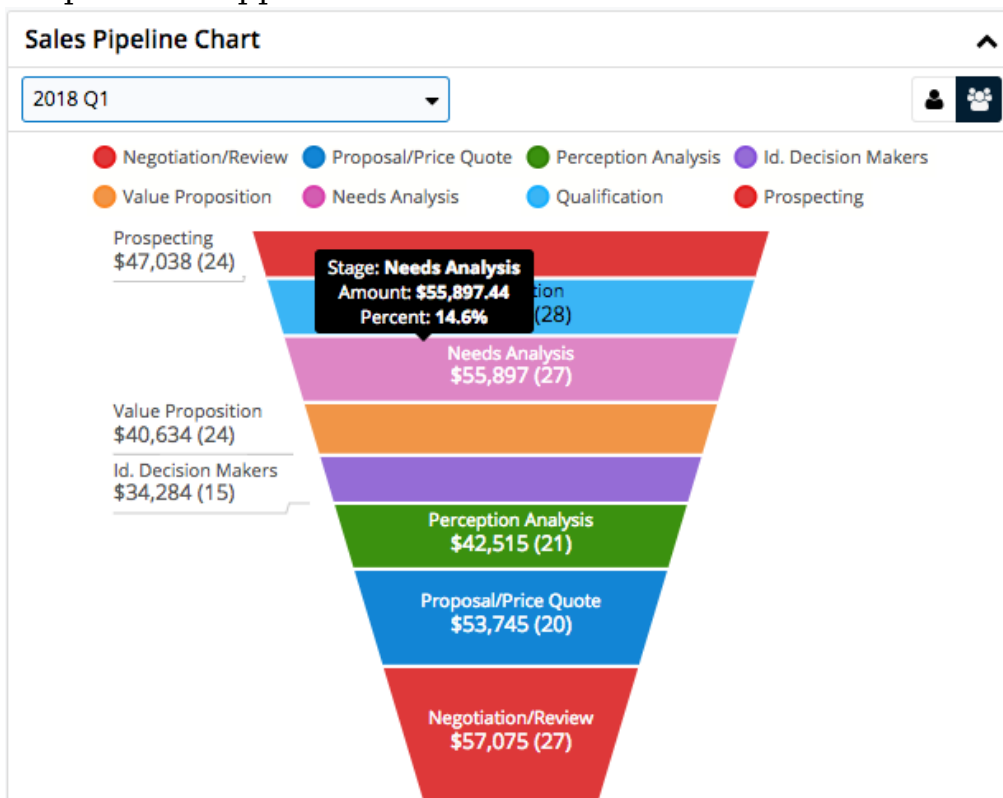
wish to access the full site where the RSS feeds originate from, simply click the title (e.g. Technology - Google News) below the dashlet header.



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.

## Sales Pipeline Chart Dashlet

The Sales Pipeline Chart dashlet illustrates the flow of open sales opportunities through the various sales stages by displaying the total dollar amounts for open records grouped by sales stage. The top of the sales funnel is the widest point and represents sales deals that are still in the earliest stage of "Qualification". The funnel narrows as unqualified prospects fall away and opportunities with higher win potential approach final sale.



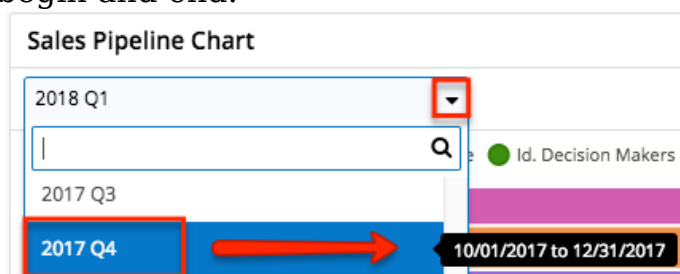
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Note: The Sales Pipeline chart assumes that the sales stages are being used as defined in the out-of-the-box Sales Stage dropdown list. While the dashlet will display custom Sales Stage field values, the out-of-the-box Closed Won and Closed Lost field values must be preserved in order for Sugar's Sales Pipeline Chart to properly identify open vs. closed business. Any custom stages added to the Sales Stage dropdown by your organization will be displayed at the top of the funnel, regardless of how the stages are sorted within the dropdown.

You can customize the Sales Pipeline Chart to monitor the overall health of your personal funnel or the aggregate funnel for you and all of the users that report to you. After adding this dashlet to the homepage, toggle between "My Pipeline" and "My Team's Pipeline" using the individual and group icons on the upper right of the dashlet. "My Pipeline" displays a summary of opportunities or revenue line items for the current user and "My Team's Pipeline" displays a summary of opportunities or revenue line items for the current user plus his direct reports as configured in the "Reports to" field of their user profile.



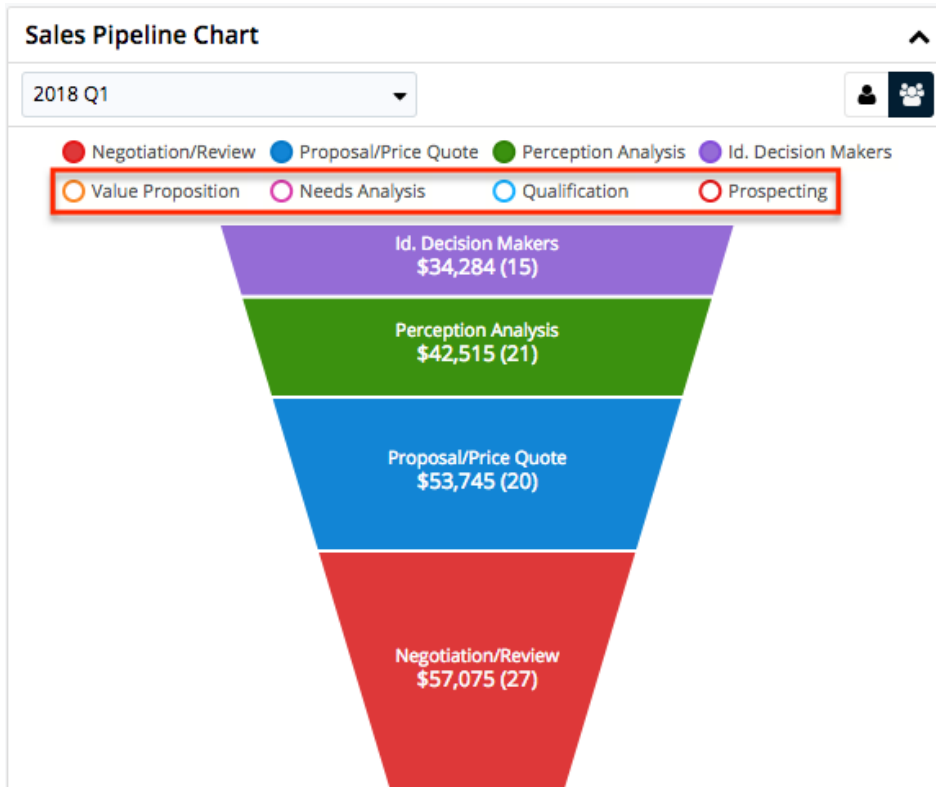
The pipeline can also be filtered by time periods that have been configured by the administrator in the Forecasts module by clicking on the time period dropdown. The chart will display only records with an expected close date within the specified date range. Hover over the time periods to see the dates that the time periods begin and end.



To further customize the dashlet, users can click on individual sales stage labels to add and remove those stages from the funnel view. In the example pictured below, only the Proposal/Price Quote and Negotiation/Review sales stages are enabled and therefore appear in the legend with solid dots. Sales stages that have been disabled will appear in the legend as empty circles.







For more detailed information on forecasting, please refer to the Forecasts documentation.

## Saved Reports Chart Dashlet

The Saved Reports Chart dashlet allows you to view pre-defined report charts as well as charts of your saved reports. When adding a Saved Reports Chart dashlet, you can select from the pre-defined report charts as well as any custom report charts to which you have access. Summation-type, summation with details-type, and matrix-type reports have the chart option available to view as dashlets.

When adding the reports chart dashlet, the following configuration options allow you to define how the chart will display. Please note that the configuration options available may vary slightly between the report chart types.

- Chart type : Select the type of chart (e.g. Vertical Bar Chart, Horizontal Bar Chart) you wish to be displayed.
  - The chart type initially defaults to the chart type defined in the originating report.
  - The chart types available to select will vary between reports.
- 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

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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. Horizontal Bar Grouped Chart).
  - Hide empty groups : Hides any empty data groups from the chart, if applicable.
    - This option only applies to bar charts.

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Cancel Save

Select a Report:  Auto Refresh:

Chart type:

Show total:  Show legend:

Show x-axis label:   Tick display methods:  Wrap ticks  Stagger ticks  Rotate ticks

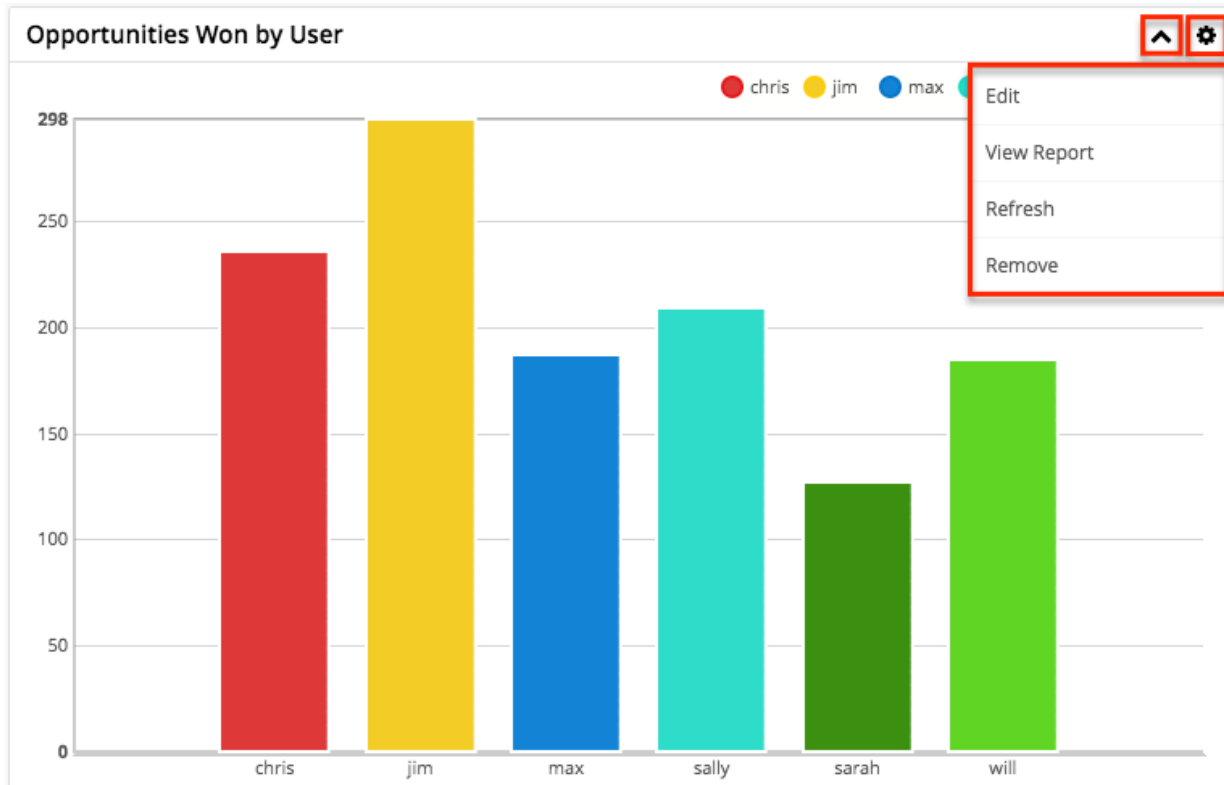
Show y-axis label:

Bar chart value placement:  Bar chart display options:  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.

## Twitter Dashlet

The Twitter dashlet allows users to view and access various feeds for specific twitter accounts via the record view's and list view's intelligence pane. In addition, users can also view and access twitter feeds via Sugar's Activity Streams as well as the Twitter dashlet on Sugar's Home page. Please note that administrators must first configure the Twitter connector before users can view twitter feeds via the Twitter dashlet. For more information on how to enable and configure the Twitter connector, please refer to the Connectors section of the System documentation in the Administration Guide.

You can easily add the Twitter dashlet by editing the dashboard on your intelligence pane. For more information on adding dashlets, please refer to the Adding Dashlets section. When adding or configuring the dashlet in the record view, please do not enter a Twitter ID as this will cause the Twitter dashlet for all other records in the module to display the same Twitter ID feed. In order to display specific twitter feeds for each record, you must enter a Twitter ID in the Twitter Account field on the Record View layout.

The following steps cover adding the Twitter ID to view feeds via the Account

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record view's intelligence pane as an example:

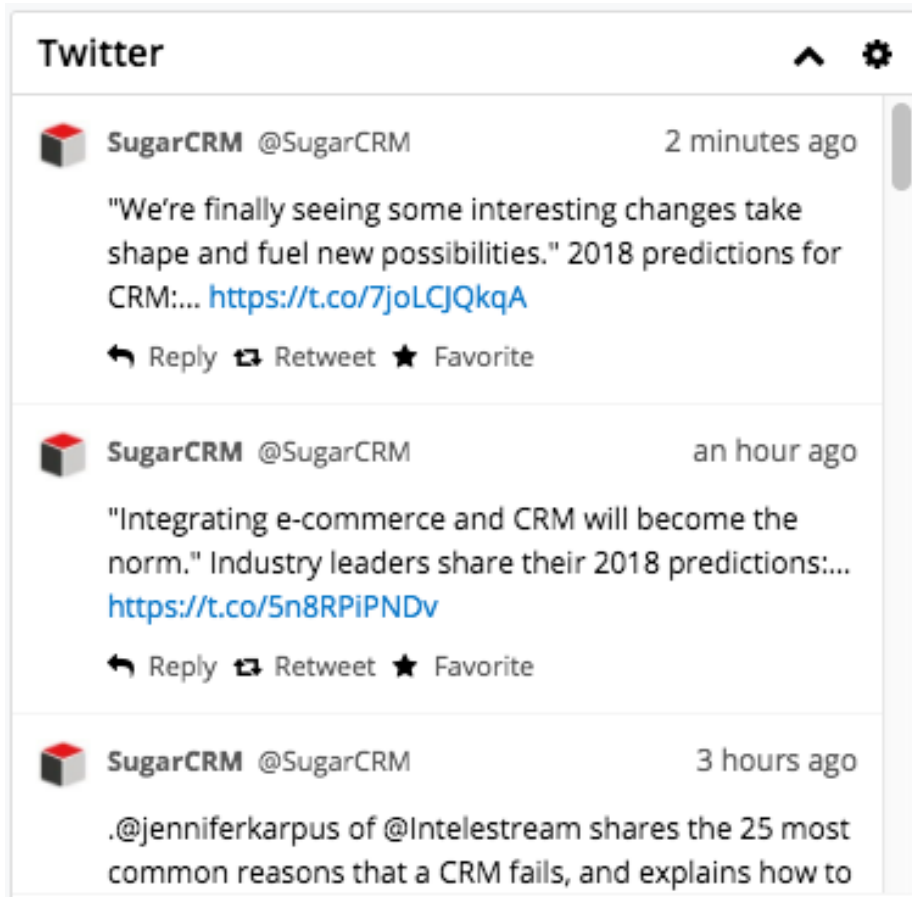
1. Navigate to an account record view's intelligence pane and verify that the Twitter dashlet is there.  
Note: If the Twitter dashlet is not displayed in the intelligence pane, you can add the dashlet by editing the dashboard. For more information on adding dashlets, please refer to Adding Dashlets section.
2. View the record's details and locate the Twitter Account field. Click the Pencil icon to the left of the Twitter Account field and enter in a Twitter ID (e.g. sugarcrm). Click "Save" to preserve the change.  
Note: If the Twitter Account field is not available on the record view, administrators must add the field via Admin > Studio. For more information on adding fields to layouts, please refer to the Studio documentation in the Administration Guide.

Ac ABC Incorporated ☆ Following Cancel Save

Website	Industry
<a href="http://www.abcinc.com">http://www.abcinc.com</a>	Communications
Member of	Type
	Customer
Assigned to	Office Phone
<a href="#">Mary Thompson</a>	(415) 282-8788
Tags	
Billing Address	Shipping Address
123 Forest Ave San Francisco, CA 94018 USA	
Alternate Phone	Email Address
	<a href="mailto:support@abc.com">support@abc.com</a>
Fax	Campaign
Twitter Account	
<input type="text" value="sugarcrm"/>	

Once the Twitter ID is saved on the record view, navigate to the Twitter dashlet in the intelligence pane to view the associated twitter feeds for the account.





Please note that if the Twitter ID is not entered in the Twitter Account field, then the Twitter connector will try to pull feeds by finding a match based on the record's name (e.g. account name, contact name). Also, if there is a custom field mapped to Twitter, the Twitter Account field will still be verified first to see if there is a valid Twitter ID and the Twitter dashlet will pull feeds using this account. If the Twitter Account field is blank, then it will check the custom field that is mapped and pull feeds based on the Twitter ID entered. If both fields are blank, then it will check the record's name to try and find a matching account to pull twitter feeds. For more information on mapping connector fields, please refer to the System documentation in the Administration Guide.

Note: Twitter dashlets on the Home page and module's list view need to have a valid Twitter ID associated in order to display the feeds. Simply click the Gear icon on the upper right of the dashlet, select "Edit", and enter the appropriate Twitter ID. Save the change and the corresponding twitter feeds will display in the dashlet.

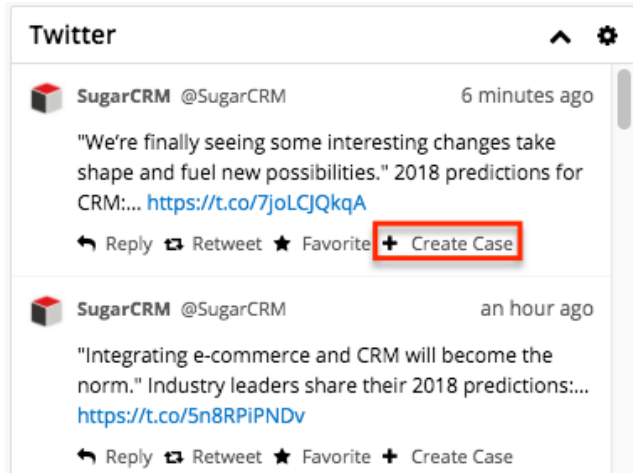
## Tweet to Case

The Tweet to Case feature allows users to create cases directly from incoming tweets within the Twitter dashlet. When this feature is enabled, users can create a case by clicking "+ Create Case" within an incoming tweet. For more information



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on using this feature, please refer to the Twitter Dashlet and Cases section of the Cases documentation.

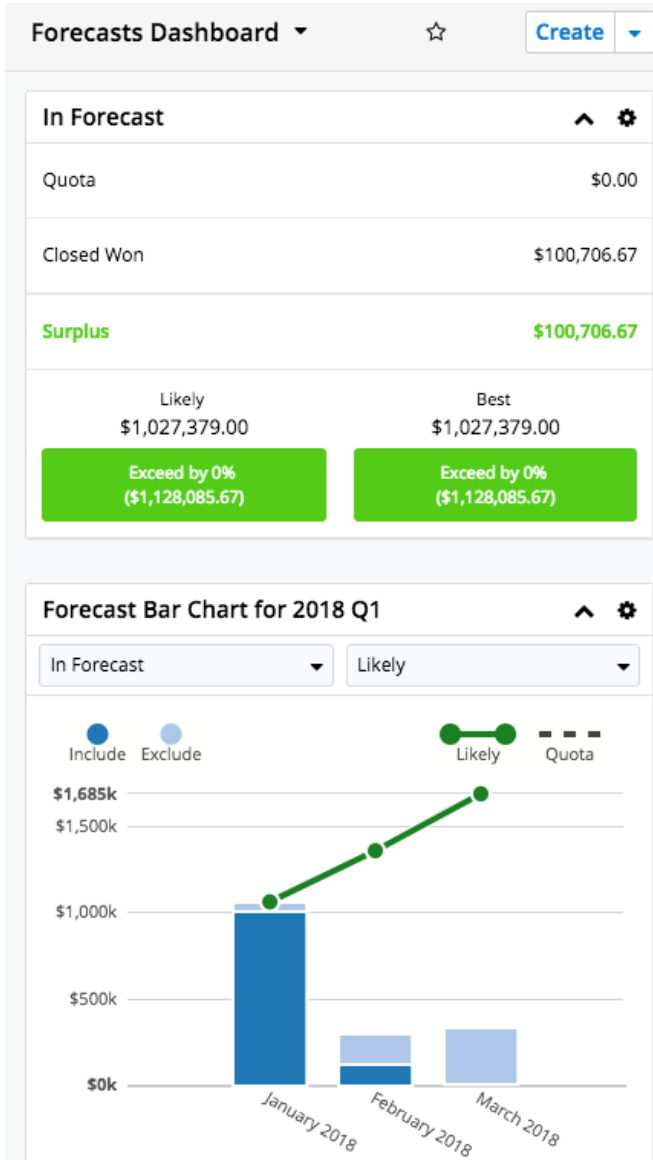


## Module-Specific Dashlets

Certain modules (e.g. Forecasts) in Sugar contain dashlets that are built specific to 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.





Last Modified: 2018-05-31 23:42:03

## 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,	Name, Type

	Description	
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.

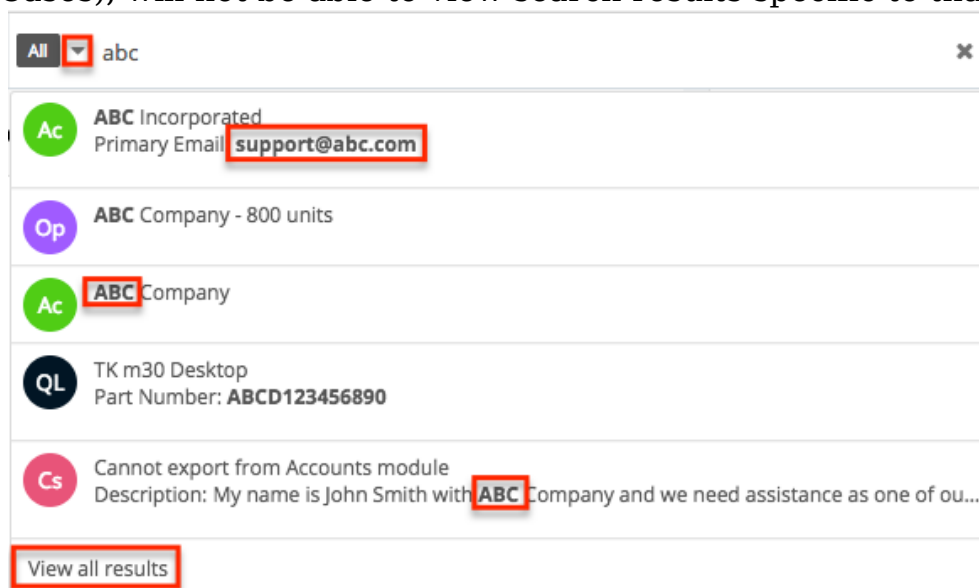
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To use global search, you need to first enter a keyword into the search box and the pop-up results will begin appearing once you enter at least one character. Please note that clicking on the search bar will expand it across Sugar's navigation bar, 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.

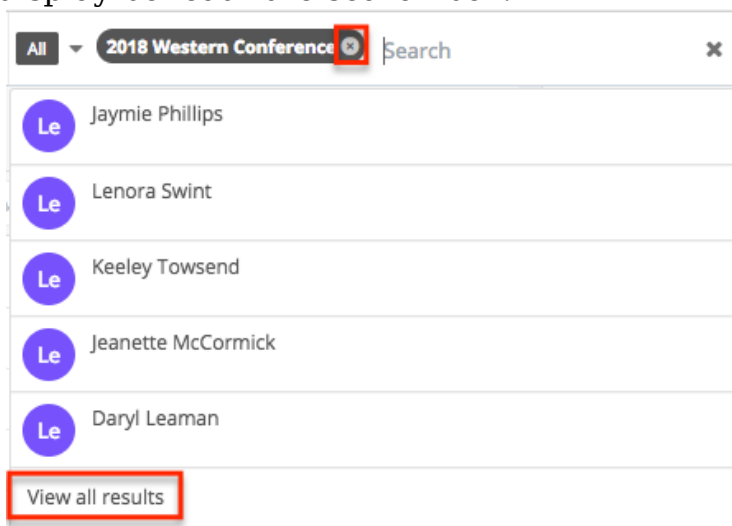
By default, up to five search results will display below the search box and include the primary field (e.g. name, subject) for the records matching your search term. The specific term (e.g. abc) in the record's field is bolded to indicate the match to the search term. In addition, if any secondary fields (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.



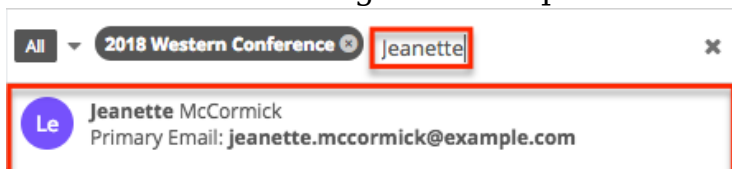
You can also perform tag searches using Global Search to easily locate groups of records that are tagged by common attributes. For more information regarding tagging records, please refer to the Tags documentation. For example, if you have a set of leads that were acquired from a specific conference 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.



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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. You can also use the following special characters in place of these operators: ampersand (&), vertical bar (|), and hyphen (-). 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" or "&"	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" 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" or "-"	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.

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

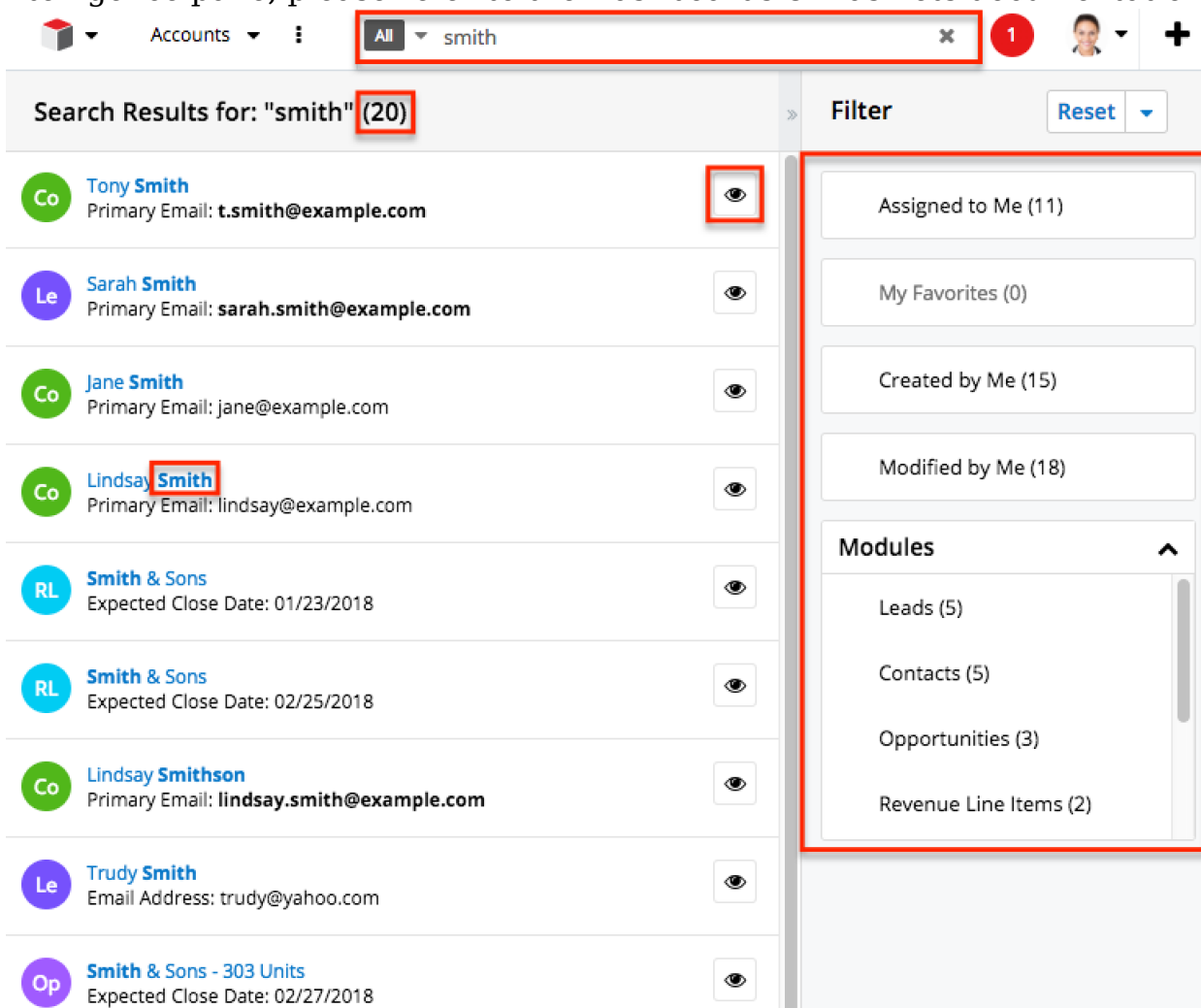
	Mary Smith Email: marys@smithcompany.com
(ABC Technologies) OR (ABC Corporation) Brooklyn	ABC Inc. Billing Street: 123 Technologies Dr. Billing City: Brooklyn
	ABC Corporation Billing City: Brooklyn
Bob AND (Smith OR Jones) AND Idaho NOT Boise	Bob Smith Company Billing State: Idaho Billing City: Nampa
	Bobby Lee Jones Primary Address State: Idaho Primary Address City: Meridian
(Jenn   Jennifer) Martin & Texas	JenniferMartinez Email: jmartinez@abc.com Primary Address State: Texas
	JennMoore Email: jmartin@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).

The screenshot shows a search results page for the query "smith" with 5 results. The results list includes:

- Sarah Smith (Leads icon), Primary Email: sarah.smith@example.com
- Trudy Smith (Leads icon), Email Address: trudy@yahoo.com
- Martha Jones (Leads icon), Primary Email: martha.j@smithandsons.com
- Linda Smithe (Leads icon), Email Address: linda@example.com
- Emily Smithson (Leads icon), Email Address: emily.s@example.com

The filter sidebar on the right includes:

- Filter section with a "Reset" button and a dropdown arrow.
- Assigned to Me (5)
- My Favorites (0)
- Created by Me (5) (checked)
- Modified by Me (5)
- Modules section with an expand/collapse arrow:
  - Leads (5) (checked)
  - Contacts (5)
  - Cases (2)
  - Accounts (2)

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.

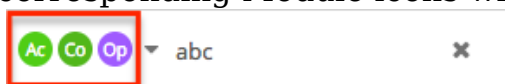
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To collapse a multi-option filter (e.g. Modules), you can click the Up arrow on the upper right of the filter. If you wish to collapse all multi-option filters (e.g. Modules) on the intelligence pane, click the Actions menu to the right of the Reset 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.

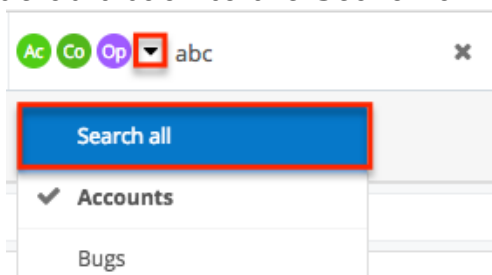


However, if more than three modules are selected, it will display the Multiple Modules icon in the search bar.



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

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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.



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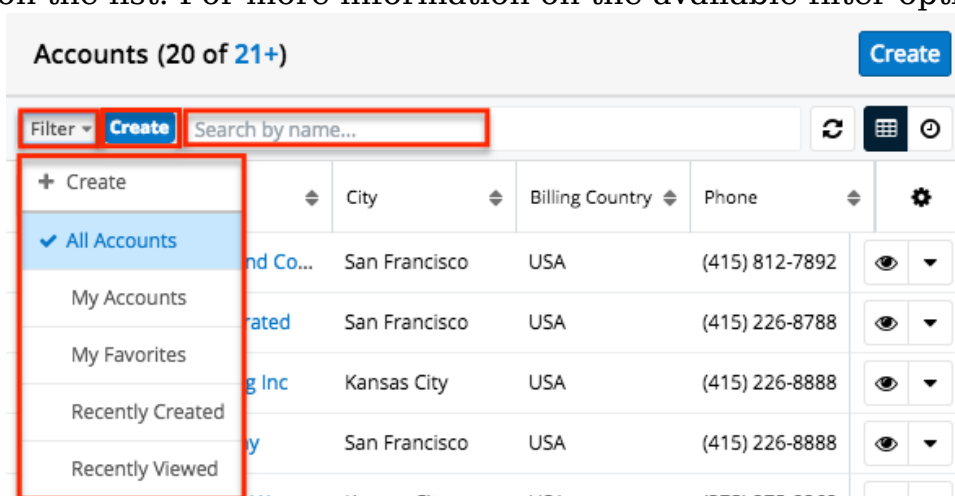
## Advanced Options

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



The screenshot shows the 'Accounts (20 of 21+)' list view in SugarCRM. At the top right is a blue 'Create' button. Below it is a search bar with a 'Filter' dropdown, a 'Create' button, and a text input field containing 'Search by name...'. A red box highlights the search bar area. Below the search bar is a dropdown menu with the following options: '+ Create', 'All Accounts' (selected with a checkmark), 'My Accounts', 'My Favorites', 'Recently Created', and 'Recently Viewed'. The main table below has columns for 'City', 'Billing Country', and 'Phone'. The first row shows 'San Francisco', 'USA', and '(415) 812-7892'. The second row shows 'San Francisco', 'USA', and '(415) 226-8788'. The third row shows 'Kansas City', 'USA', and '(415) 226-8888'. The fourth row shows 'San Francisco', 'USA', and '(415) 226-8888'. The fifth row shows 'Kansas City', 'USA', and '(415) 226-8888'. Each row has a visibility icon (eye) and a dropdown arrow on the right.

When you choose a filter and run a search, Sugar will return records with a

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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).

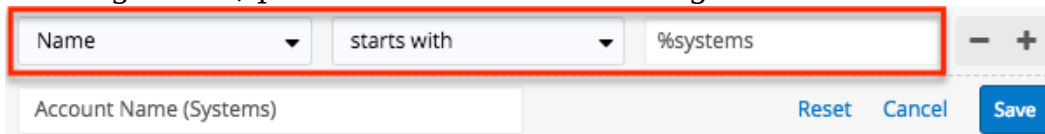
The following search examples illustrate List View search behavior:

Search Criteria	Matching Search Results	
	First Name	Last Name
rob	Rob Roberta John	Smith Collins Roberts
%bert	Bert Roberta John	Andermie Collins Roberts
r_b	Roberta Ruby John	Collins Lieu Roberts
%r_b	Rob John Mirabel	Smith Roberts Glaston
_it	Rob Anita	Smith Nother
r_b% smit%	Robert Rob	Smith Smite
rob smith	Rob Robert Rob Roy	Smith Smith Smith
smith	Rob Smith	Smith Johnson
jean	Jeannine Jean Paul	Pugh Gaultier
paul	Sue Paul	Paulson 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.

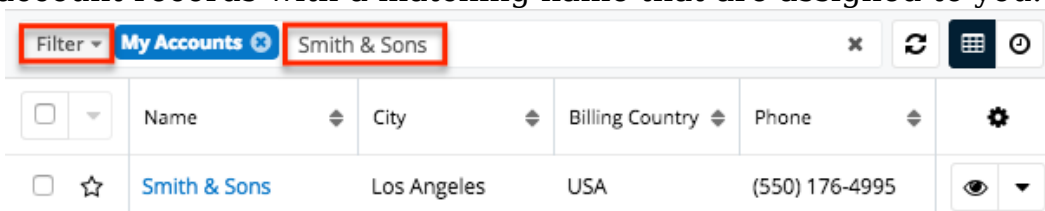
In addition, you can use the wildcard character when specifying the search criteria for custom filters with the "starts with" operator. Please note that the wildcard character will only work with the "starts with" operator. For example, if you wish

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.

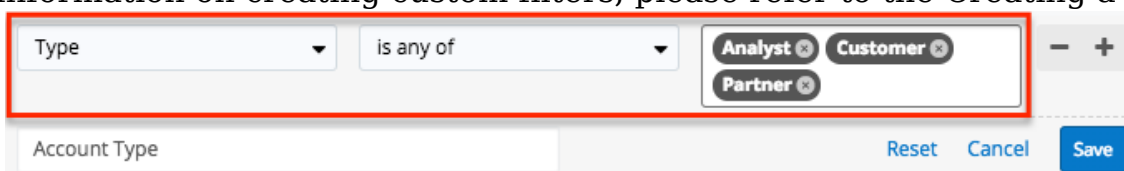


## AND vs OR

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.

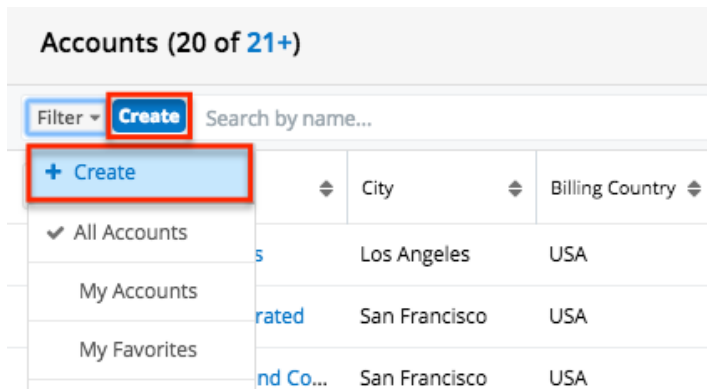
## Creating a Filter

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.



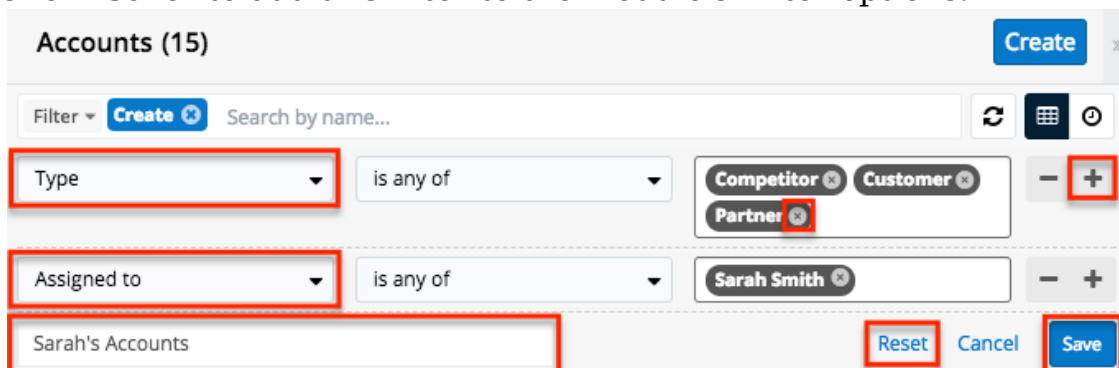
2. Select "Type" as the filter field and select the "is any of" operator then add "Competitor", "Customer", "Partner" as the search values. As you create the new filter criteria, it will be applied to the list view concurrently to display the matching results. To remove specific filter values (e.g. customer, 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

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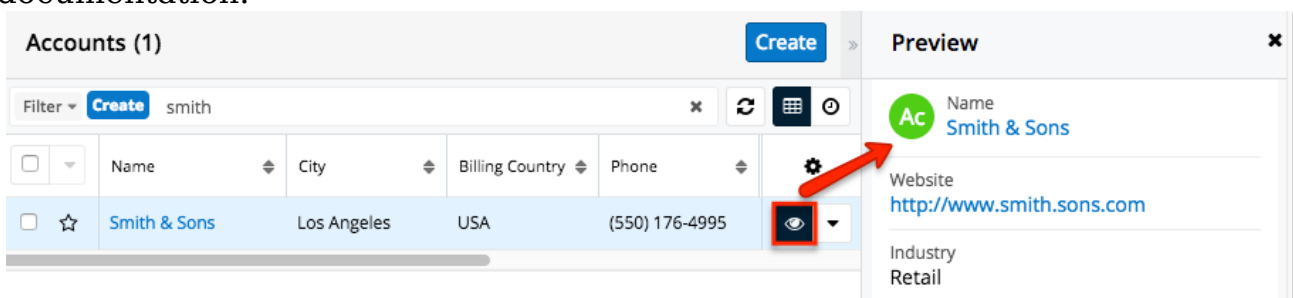
far right of the filter's name to clear the filter value(s).

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.

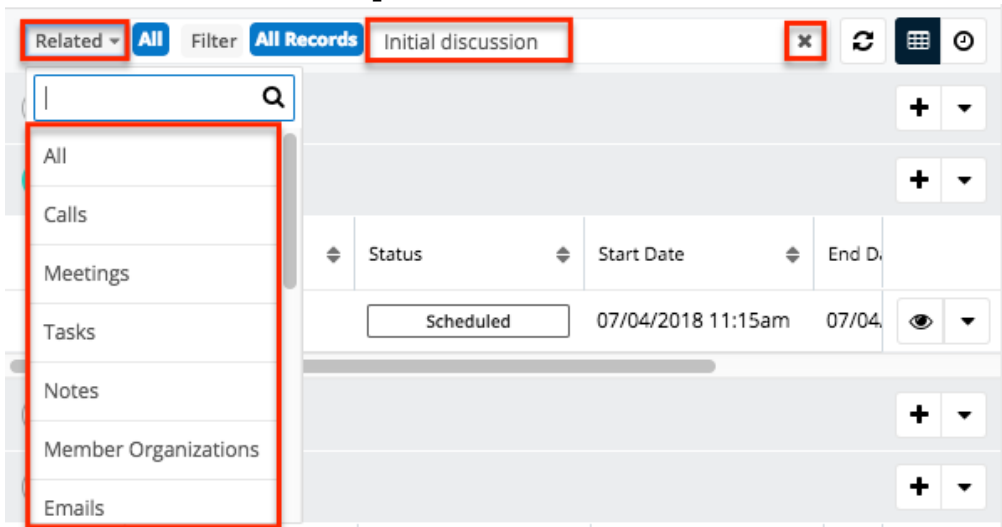


## Record View Search (Sidecar Modules)

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

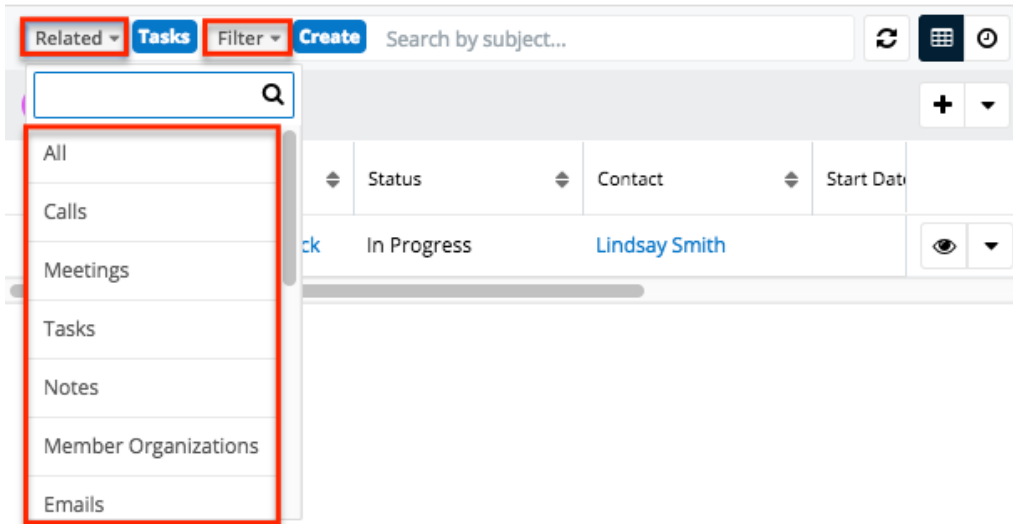
Users can search for related records simply by entering in the name of the record in the Record View's search box. Please note that the system will only search for related records which appear in the subpanels of the record view. The relevant record(s) meeting the search criteria will display in their 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, Robert, Robin	Bob, Jacob
%bert	Albert, Bert, Robert	Bart
r_b	Robert, Ruby	Bob, Raab
%s_i	Dustin, Christi, Smith	Sophie, Josephine
_it	Nita, Littrell	Schmitt

r_b% smit%	Robert Smith, RobSmite	Bob Smith, Robert Phillip
rob smit	Rob Smith, Rob Smite	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

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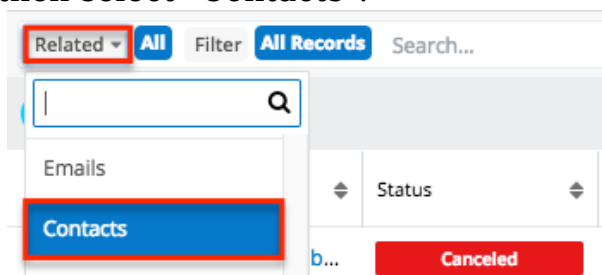
a custom filter if you wish to have more complex filter options when searching.

### Creating a Related Records Filter

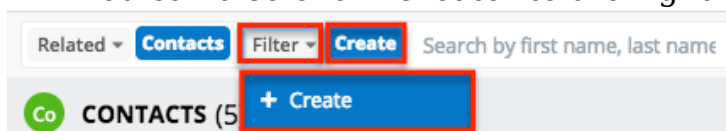
Users can also create new filters via the Create Filter option in the Filter list of the search bar. This allows users to add custom, complex filter options when searching in the module's record view. You have the option to add multiple fields to your new filter and set select operators (e.g. is any 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".

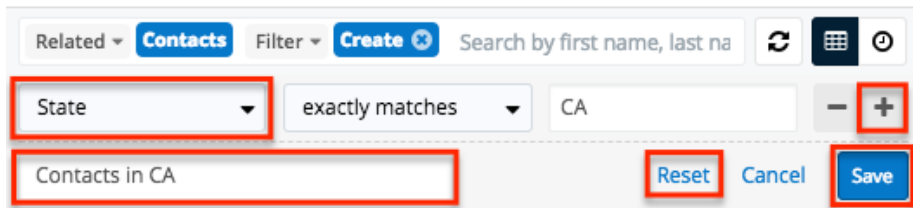


2. Click the Filter option on the Search bar then select "Create".
  - You can also click "Create" to the right of the Filter option.

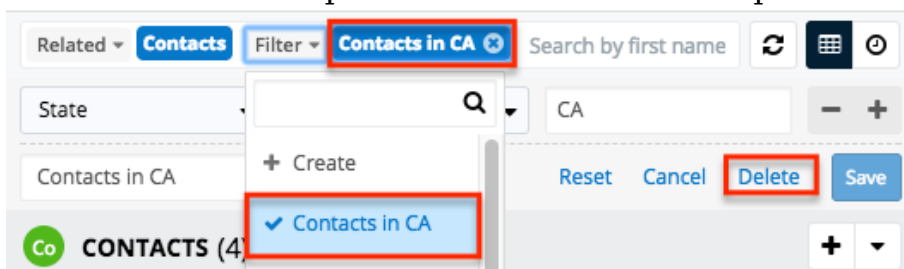


3. Select "State" as the filter field and select the "exactly matches" operator then enter "CA" as the search value. As you add in the filter criteria's, it will be applied to the subpanel view concurrently to display any matching results.
  - To clear any filter values (e.g. CA), simply select "Reset" 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.



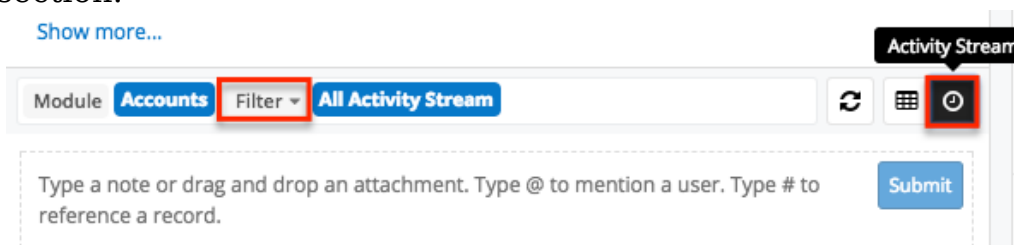


The filter will now appear as an option in the Filter list when "Contacts" is selected as the related module. Please note that you can easily delete custom filters by selecting the filter from the Filter list of the related module (e.g. Contacts), clicking the filter's name (e.g. Contacts in CA) on the 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

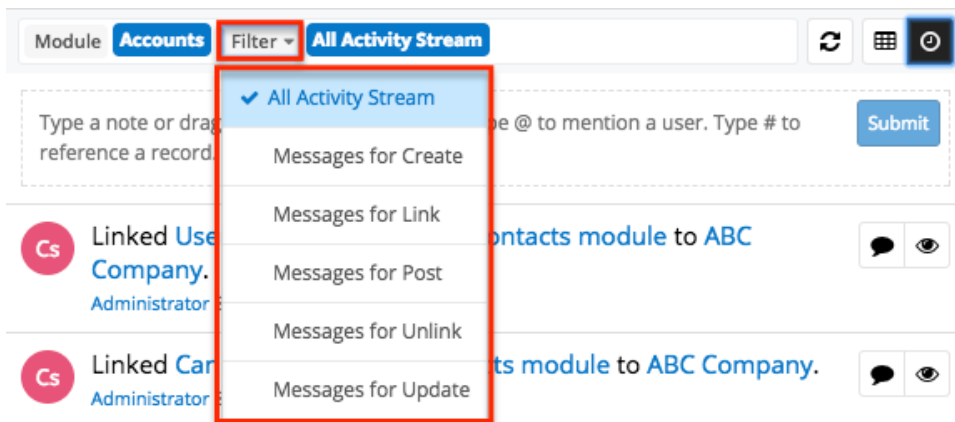
The record view's activity stream displays all posts specific to the current record you are viewing. Please note that users can view all post's in the record view's activity stream even if they do not follow the record in Sugar. To access the record view's activity stream, navigate to the module's record 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.



## Activity Type Filter

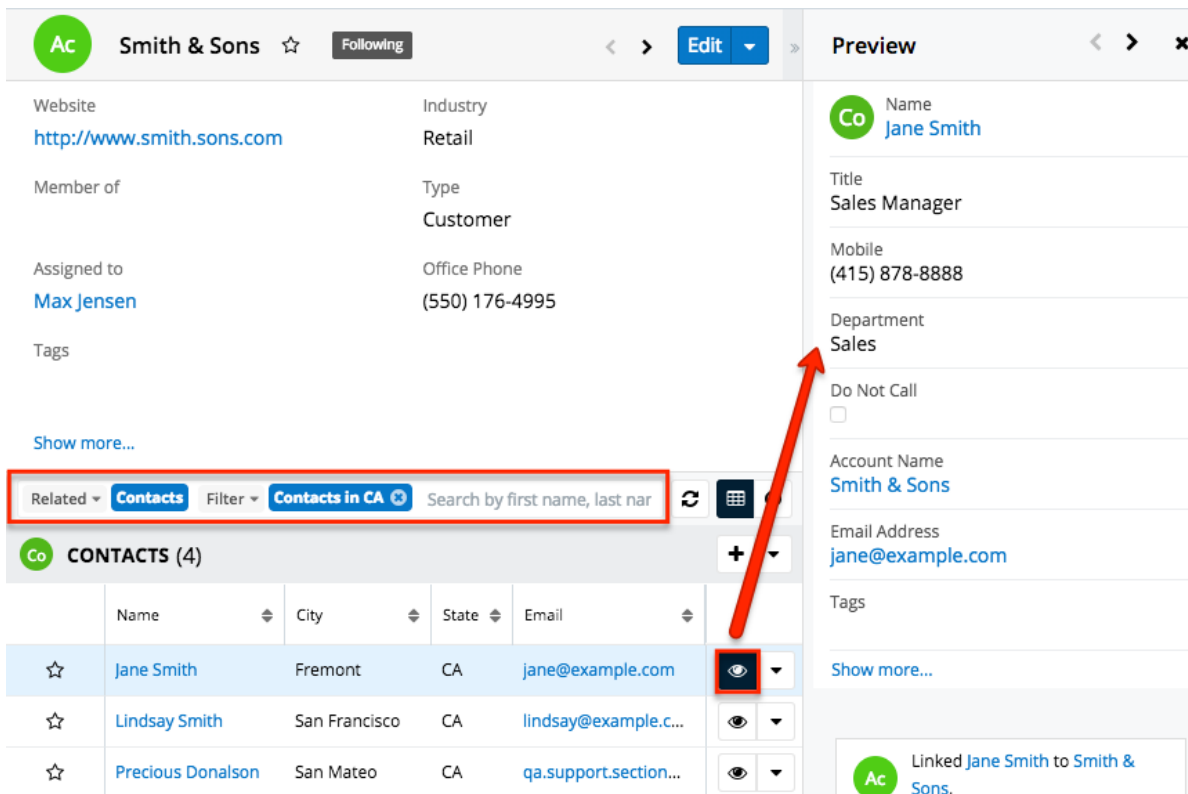
The record view activity stream can be filtered to only display certain messages (e.g. Messages for Create, Messages for Update) by clicking "Filter" above the post

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.



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## 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.

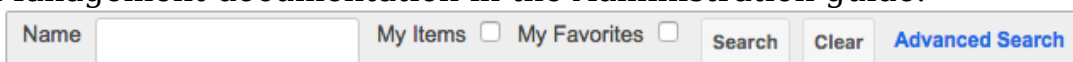
### Basic Search

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.



The image shows a search interface with a text input field labeled "Name". To the right of the input field are two checkboxes: "My Items" and "My Favorites". Further right are three buttons: "Search", "Clear", and "Advanced Search".

Administrators can configure what fields appear on the Basic Search via Admin >



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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:

The screenshot displays the Advanced Search interface with the following elements:

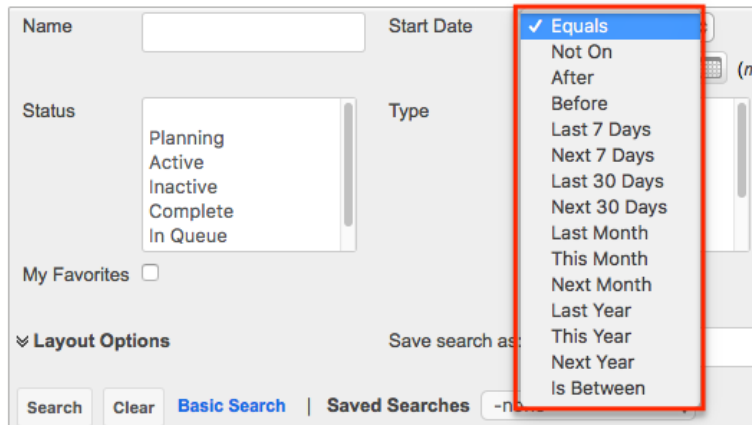
- Document Name**: Text input field.
- Category**: Dropdown menu with options: Marketing, Knowledge Base, Sales.
- Sub Category**: Dropdown menu with options: Marketing Collateral, Product Brochures, FAQ.
- Publish Date**: Text input field with a calendar icon.
- Expiration Date**: Text input field with a calendar icon.
- Assigned to**: Dropdown menu with options: Administrator, Chris Olliver, Jim Brennan, Max Jensen, Sally Bronsen, Sarah Smith.
- My Favorites**: Checkbox (unchecked).
- Layout Options**: Expandable section.
- Save search as:** Text input field with a **Save** button.
- Modify current search:** **Update** and **Delete** buttons.
- Search**: **Search**, **Clear**, **Browse Documents**, **Basic Search** (highlighted), **Saved Searches** dropdown (showing "-none-").

- **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

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search on.

### Search Campaigns



- **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.

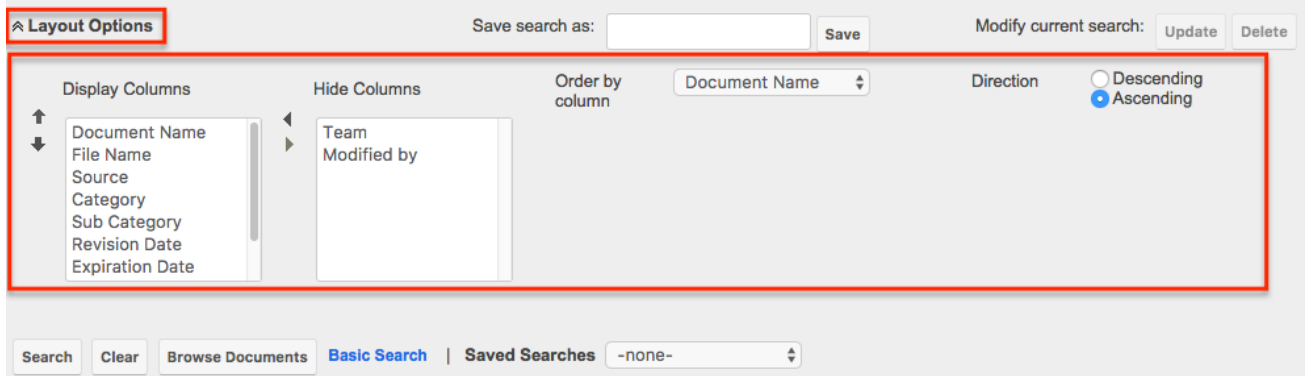
Administrators can configure what fields appear on the Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration Guide.

### Layout Options

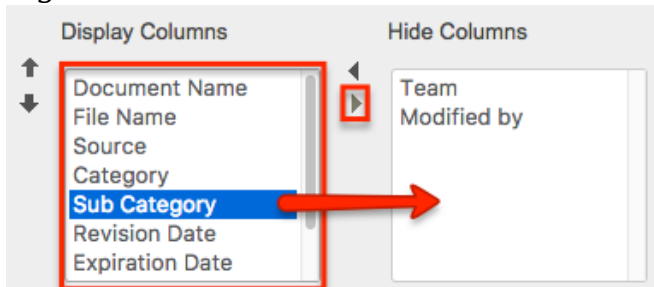
Sugar gives users the ability to personalize the list view of each module through the advanced search layout options feature. Users can pick which fields are displayed in the list view, the order they are displayed in, and which column the records are ordered by.

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

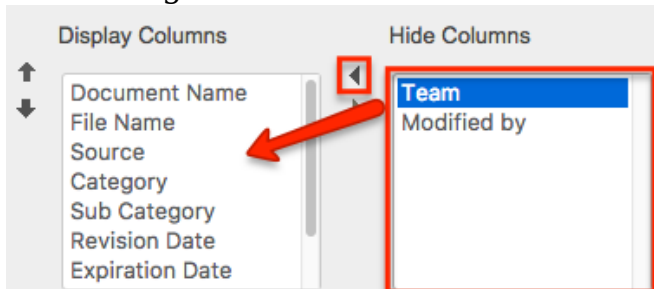
1. Click on the Layout Options link to expand the available options below.



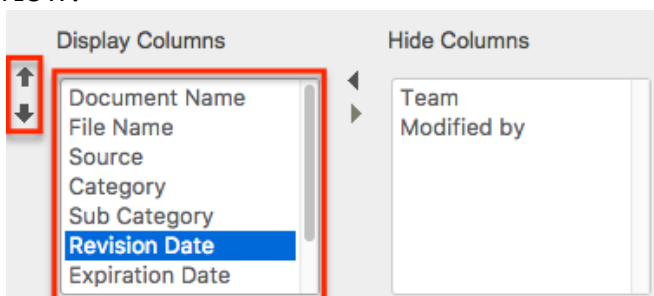
2. Select any column name in the Display Columns panel and click the right aligned arrow to remove the column from the list view.



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.



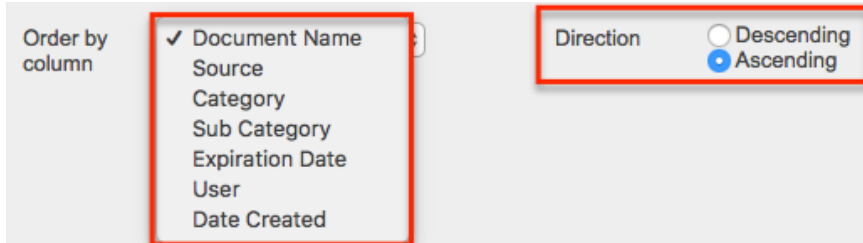
5. In the Order By column dropdown, select a field to order your results by. Only columns in the Display panel will be available to order by and some columns

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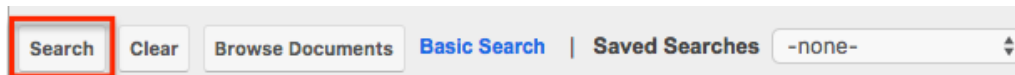
(e.g. Email Address) are not available for sorting.

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.

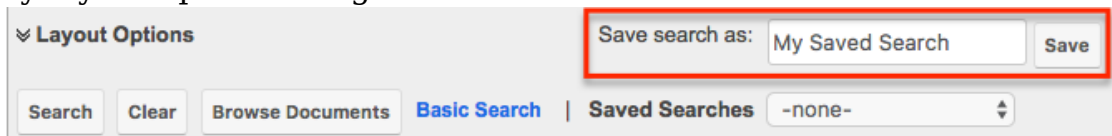
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Note: Saved searches are user specific and can not be seen or shared by other users.

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

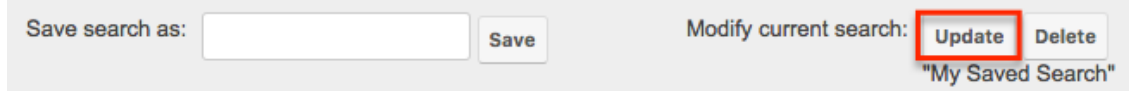
1. Enter any number of search criteria you desire.
2. Enter a descriptive title for the search in the "Save search as" textbox and click "Save".

Note: Any layout option changes made will also be saved with the saved search.

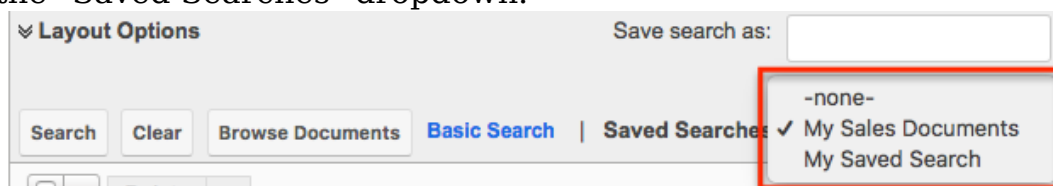


3. The search is saved and executed. You now have the ability to modify any search criteria or layout options. After any necessary modifications are made click the Update button next to "Modify current search".

Note: The name of the search you will be updating shows below the Update button.

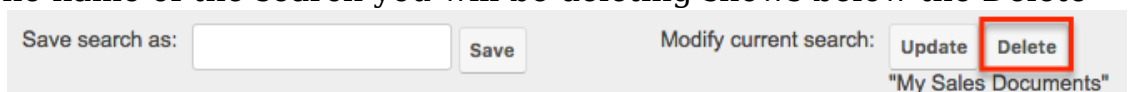


4. There is no way to modify the name of a saved search. Alternatively, you can execute a saved search, enter a new name into the "Save search as" textbox and click save. This will create a new saved search with the same criteria as the original with the new name. You may then proceed to delete the old 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.



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## AND vs OR

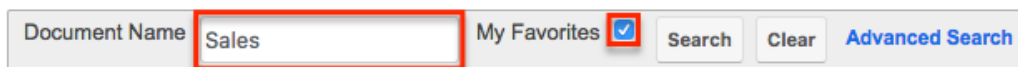
When performing searches in the Basic or Advanced search panels, Sugar uses the "and" operator, not "or". This means that if you are searching against multiple fields, Sugar will place an "and" in between each search field returning only records matching all of your search criteria. For example, a search 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.

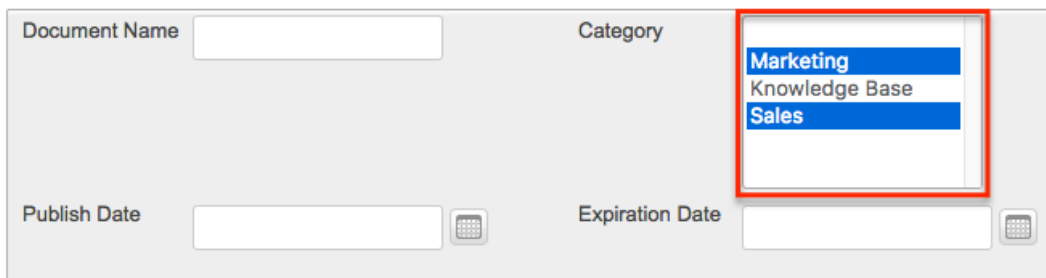
### Basic Search:

#### Search Documents



Document Name  My Favorites  Search Clear [Advanced Search](#)

### Advanced Search:



Document Name  Category   
Knowledge Base  
Sales  
Publish Date  Expiration Date

## 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, Robert, Robin	Bob, Jacob
%bert	Albert, Bert, Robert	Bart
r_b	Robert, Ruby	Bob, Raab
%s_i	Dustin, Christi, Smith	Sophie, Josephine
_it	Nita, Littrell	Schmitt
r_b% smit%	Robert Smith, RobSmite	Bob Smith, Robert Phillip
rob smit	Rob Smith, Rob Smite	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

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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.

Last Modified: 2018-03-07 17:16:38

# 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.

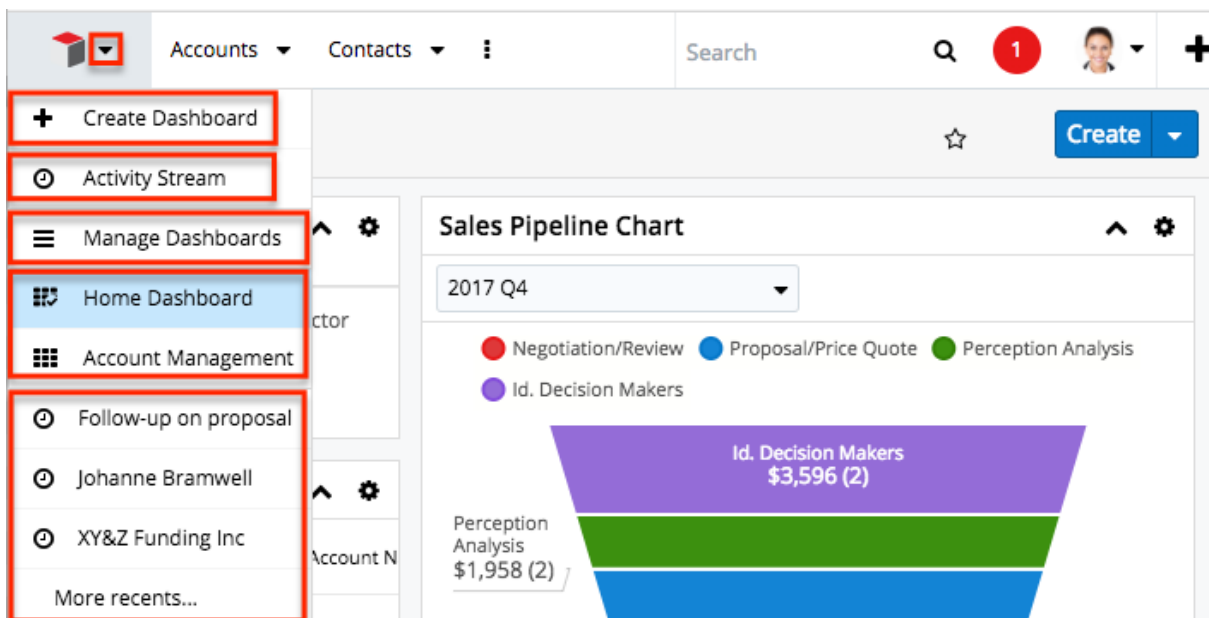


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## Home Module Tab

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
- **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 reconds..." will display a fourth record.



## Dashboards

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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.

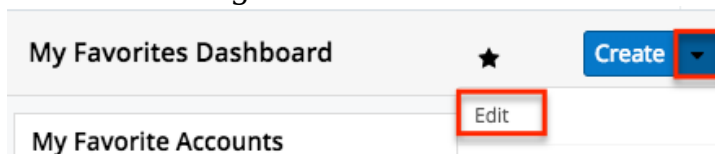
Instances that are upgraded from Sugar 6.x to Sugar 7.x will have their legacy dashboards migrated over. Users will be able to view these by selecting "My Legacy Dashboard" from the Sugar cube icon. For more information regarding the legacy dashboard, please refer to the My Legacy Dashboard section.

## Changing Home Dashboard Layouts

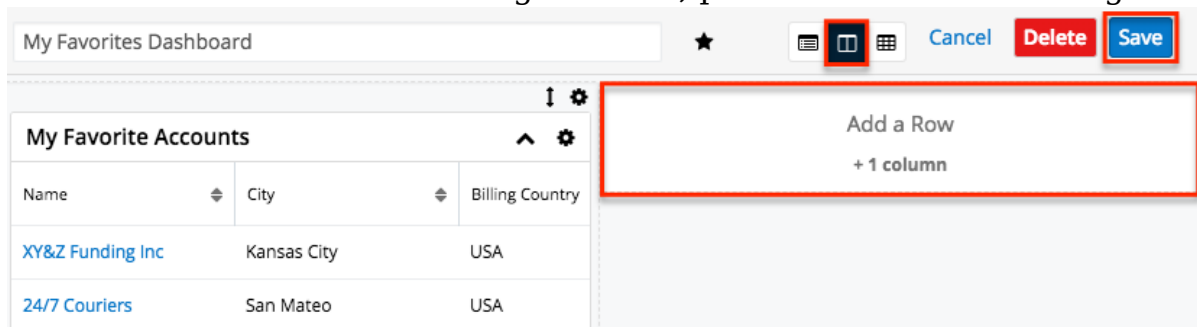
Users can change the number of columns on their Home dashboards depending on how they wish to view the information. You can organize the dashlets into one, two, or three columns.

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



3. Click "Save" once the appropriate changes have been made to the dashboard.
4. The dashboard will now display the dashlets across two columns.

My Favorite Accounts			My Favorite Contacts		
Name	City	Billing Country	Name	Title	Account Name
XY&Z Funding Inc	Kansas City	USA	Don Connors	Director Sales	Super Star Holdings Inc
24/7 Couriers	San Mateo	USA	Cornelius Cartier	VP Operations	J.K.M. Corp (HA)

## 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:

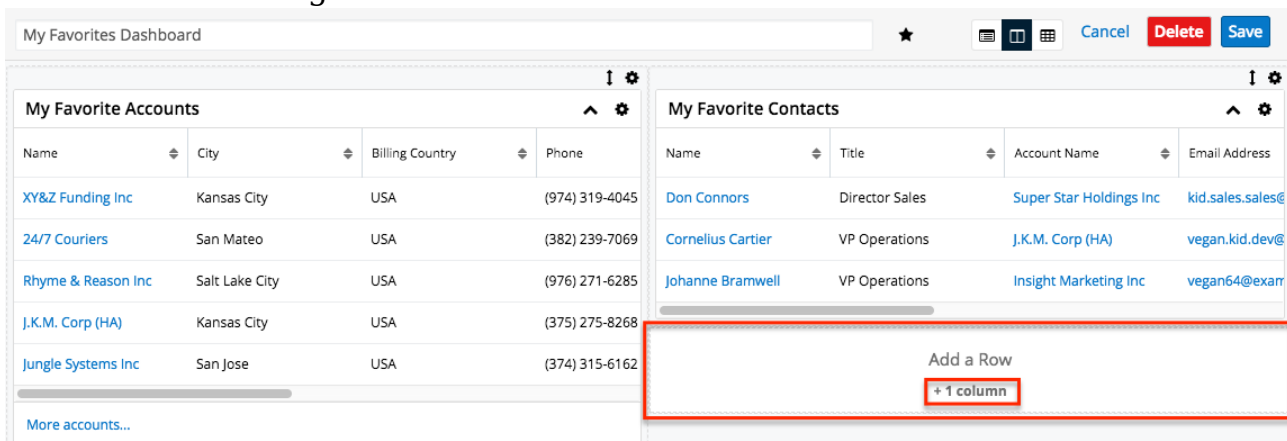
Dashlet	Description
List View Dashlet	Enables users to view a list of records for a specific module (e.g. Accounts, Contacts, Leads) in Sugar
Planned Activities Dashlet	Provides users with a list of open or upcoming calls and meetings that are assigned to them
Active Tasks Dashlet	Allows users to view 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

Please note that you can add the same dashlet multiple times in the dashboard with different configurations to show different records or information.

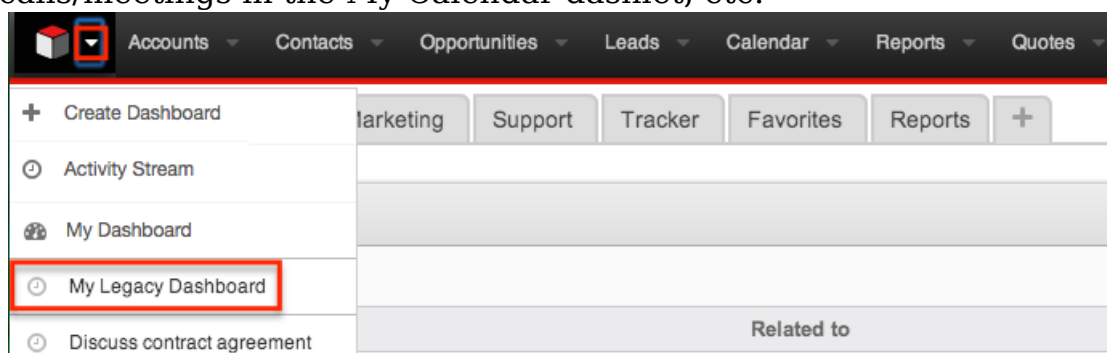


## My Legacy Dashboard

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

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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.

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### Activity Stream

Filter ▾ All Activity Stream 

Type a note or drag and drop an attachment. Type @ to mention a user. Type # to reference a record.

-  Updated [Office Phone](#) on [Don Connors](#).  
Administrator a few seconds ago  
-  Linked [Don Connors](#) to [XY&Z Funding Inc.](#)  
Administrator a few seconds ago  
-  Linked [Max Jensen](#) to [Process Review Meeting](#).  
Administrator 5 hours ago  

Last Modified: 2017-12-21 23:43:57

## Leads

### Overview

Sugar's Leads module consists of individual prospects who may be interested in a product or service your organization provides. In addition to standard creation options, leads can provide their own details to you via a web-to-lead form or via self-registration on the Sugar Portal. Once the lead is qualified according to your organization's practices, it can be converted into a contact, opportunity, account, or other record. This documentation will cover information and actions specific to the Leads module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting leads, please refer to the Working With Leads section of this page.

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

### Lead Fields

The Leads module contains a number of stock fields which come out-of-the-box with Sugar. The definitions below are suggested meanings for the fields, but the fields can be leveraged 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

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to the Studio documentation in the Administration Guide.

Field	Description
Account Description	A description or other information about the lead account
Account Name	The account to which the lead belongs  Note: Unlike the Contacts module, the Account Name field is not a Relate field in the Leads module. When you convert the lead, you will have the option to create the account as a related record.
Alternate Address	The lead's alternate address (e.g. billing, shipping)
Assigned to	The Sugar user assigned to the lead
Assistant	The name of the lead's assistant within his or her company
Assistant Phone	The assistant's phone number
Avatar	The lead's profile image
Birthdate	The lead's date of birth
Campaign	The campaign, if any, from which the lead originated
Converted	Indication that the lead has been converted to a contact, opportunity, or account
D&B Principal ID	Unique ID number associated to the individual in D&B
Date Created	The date the lead record was created
Date Modified	The date the lead record was last modified
Department	The lead's department within their company
Description	A description or other information about the lead
Do Not Call	Indication that the lead should not be called
Email Address	The lead's email address
Facebook Account	The lead's Facebook account

	information
Fax	The lead's fax number
First Name	The lead's first name
Google Plus ID	The lead's Google Plus ID
Home Phone	The lead's residence number
Language Preference	The lead's preferred language when accessing Sugar Portal
Last Name	The lead's last name
Lead Source	The source from which this lead originated
Lead Source Description	A description or other information about the lead source
Mobile	The lead's mobile number
Name	When viewing, the lead's full name
Office Phone	The lead's office number
Opportunity Amount	The expected opportunity amount for the potential business with the lead
Opportunity Name	The opportunity name associated with the lead
Other Phone	The lead's alternate phone number
Primary Address	The lead's primary address
Referred By	The name of the individual or organization that referred the lead
Salutation	Standard greeting for the lead (e.g. Mr., Ms., Mrs., etc.)
Status	The current status of the lead Note: The converted status cannot be set directly in the Status field. Rather, the conversion process must be completed.
Status Description	A description or other information about the lead's status
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports Note: For more information on creating and using tags, please refer to the Tags documentation.



Teams	The Sugar team(s) assigned to the lead record
Title	The lead's business title
Twitter Account	The lead's Twitter account information
Website	The website URL associated with the lead's organization

## Working With Leads

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 Leads section describe Leads-specific behaviors and functionality.

Content Link	Description
Creating Leads Basic Lead Creation Creating via Quick Create Creating via Subpanels Creating via Duplication Importing Leads	The Creating Records section covers the various methods of creating new lead records, including via the Create button in the Leads module, the Quick Create menu on the upper right of every Sugar page, via the Leads subpanel on related module records, duplication of an existing lead record, and importing a list of leads into Sugar using a .csv spreadsheet.
Viewing Leads 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 lead records, including via the Leads list view and record view, the Recently Viewed menu in the Leads module tab, list view dashlets showing lead information, activity stream entries concerning lead updates or where a user mentions a lead, previewing leads in the right-hand side panel, and reports displaying lead data.
Searching for Leads 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 leads: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Leads module.

<ul style="list-style-type: none"> <li>Leads List View</li> <li>Total Record Count</li> <li>Create Button</li> <li>List View Search</li> <li>Checkbox Selection</li> <li>Mass Actions Menu</li> <li>Favorite Designation</li> <li>Column Reordering</li> <li>Column Resizing</li> <li>Column Sorting</li> <li>Column Selection</li> <li>Preview</li> <li>Record Actions Menu</li> <li>More Leads</li> <li>Activity Stream</li> <li>Dashboards</li> </ul>	<p>The List View section walks through the many elements of the Leads List View layout which contains a filterable list of all lead 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 Leads list view are described in the</p>
<ul style="list-style-type: none"> <li>Leads Record View</li> <li>Favorite Designation</li> <li>Following Designation</li> <li>Next or Previous Record</li> <li>Actions Menu</li> <li>Show More</li> <li>Subpanels</li> <li>Related Record Subpanels</li> <li>Filtering Subpanels</li> <li>Reordering Subpanels</li> <li>Activity Stream</li> <li>Dashboards</li> </ul>	<p>The Record View section walks through the many elements of the Leads Record View layout which contains detailed information about a single lead record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Leads record view are described in the Record View Actions Menu section of this page.</p>
<ul style="list-style-type: none"> <li>Editing Leads</li> <li>Editing Inline via Record View</li> <li>Editing via Record View</li> <li>Editing Inline via Subpanels</li> <li>Editing Inline via List View</li> <li>Mass Editing via List View</li> <li>Editing Fields</li> </ul>	<p>The Editing Records section describes the various methods of editing existing lead records, including inline via the Leads record view, in full edit mode on the record view, inline via the Leads subpanel on related module records, inline via the Leads list view, and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.</p>
<ul style="list-style-type: none"> <li>Deleting Leads</li> <li>Deleting via Record View</li> <li>Deleting via List View</li> <li>Mass Deleting via List View</li> </ul>	<p>The Deleting Records section describes the various methods of deleting unwanted leads, including via the Leads record view, an individual record's Actions menu on the Leads list view, and the Mass Actions menu on the list view.</p>

<p>Emailing Leads  Emailing via Email Address Fields  Emailing via List View  Emailing via Quick Create  Emailing via Emails Module  Emailing via Workflows</p>	<p>The Emailing Records section describes the various methods of emailing lead records as recipients, including clicking any email address within Sugar, via the Mass Actions menu on the Leads list view, via the Quick Create menu, via the Emails module using the Related To field, and via workflows which can automatically send emails according to conditions configured by administrator users.</p>
<p>Exporting Leads</p>	<p>The Exporting Records section provides an introduction to the export functionality which allows you to download a list of leads and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).</p>
<p>Recalculating Calculated Values</p>	<p>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 &gt; Studio.</p>
<p>Finding Duplicate Leads</p>	<p>The Finding Duplicate Records section provides instructions for locating duplicate lead records. If searching on matching fields (e.g. Last Name) identifies one or more duplicates, they can be merged into a single record.</p>
<p>Merging Leads  Merging via List View</p>	<p>The Merging Records section provides instructions for merging duplicate leads which will combine field values and related records into a single lead.</p>
<p>Viewing Lead Historical Summaries</p>	<p>The Viewing Record Historical Summaries section describes the Historical Summary record view option which displays quick details of the lead record's related calls, meetings, emails, notes, and tasks.</p>
<p>Viewing Lead Change Logs</p>	<p>The Viewing Record Change Logs section describes the View Change Log record view option which displays a history of changes to the lead's audited</p>

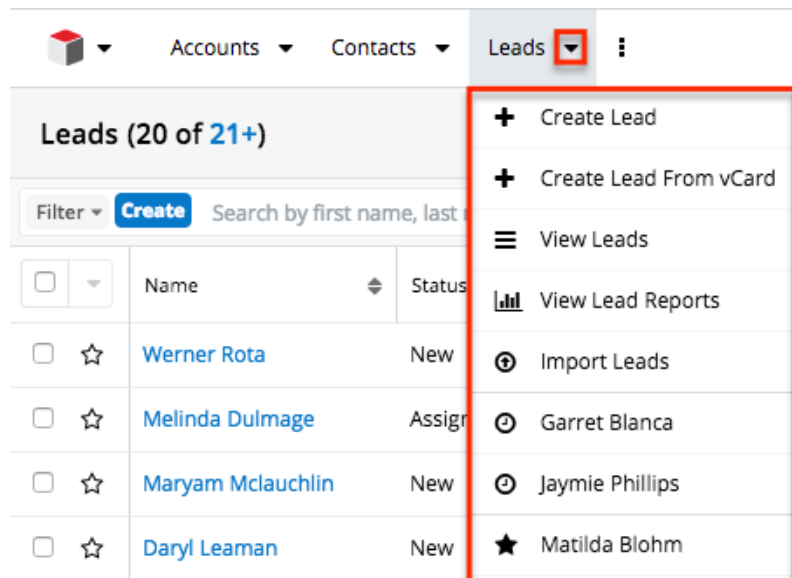
	fields.
Lead PDFs Downloading Lead PDFs Emailing Lead PDFs	The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of lead information as configured by an administrator via Admin > PDF Manager.
Favoriting Leads Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking leads as favorites, including via the Leads list view, Leads record view, or any Leads subpanel appearing on the record view of a related module. Favoriting a lead allows you to easily access it from list views, dashlets, or the Leads module tab.
Following Leads Following via List View Following via Record View	The Following Records section describes the various methods of marking leads as "Following", including via the Leads list view and record view. Following a lead causes its activity stream updates to be included on your Home page and Leads list view activity streams so that you can easily keep up with changes and user posts on the record.
Sharing Leads	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the lead record. If the recipient is logged into Sugar, clicking the link will bring them directly to the lead's record view.

## Lead Menus

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

## Module Tab Menus

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



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

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

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

- The Leads module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Leads module in the Hide Modules list, simply

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move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.

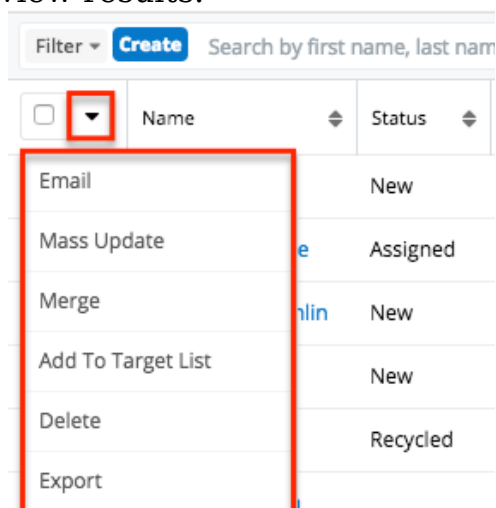
- The administrator may have disabled the Leads module for your entire Sugar instance. Reach out to your Sugar administrator to have the Leads module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration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

## List View Menus

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

### List View Mass Actions Menu

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



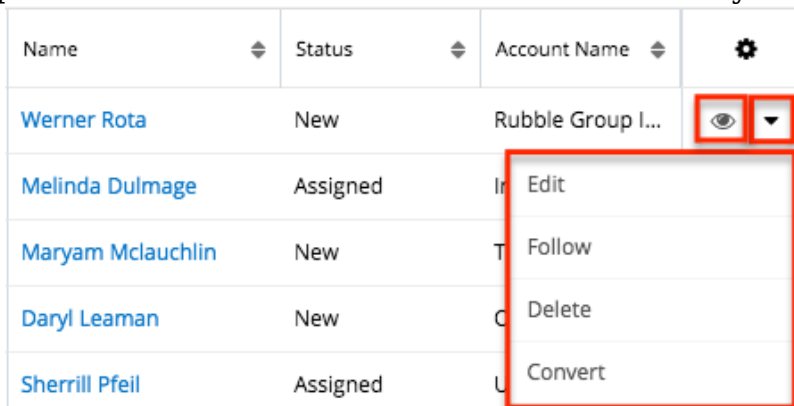
The options in the Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Email	Email one or more leads at a time

Mass Update	Mass update one or more leads at a time
Merge	Merge two or more duplicate leads
Add to Target List	Add one or more leads to a target list
Delete	Delete one or more leads at a time
Export	Export one or more leads to a CSV file
Recalculate Values	(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 lead directly from the list view.

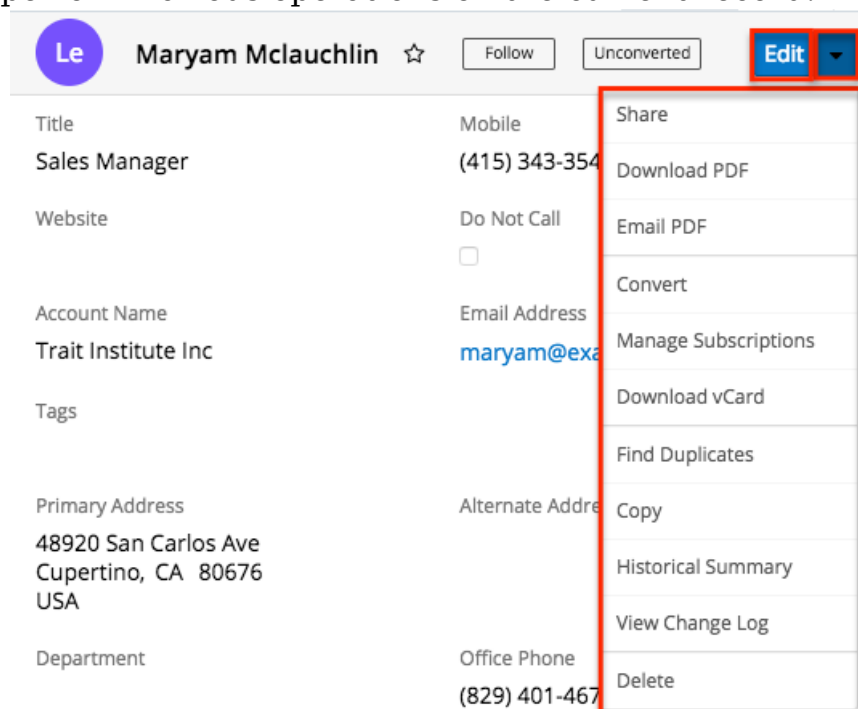


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this lead in the intelligence pane
Edit	Edit this lead
Follow	Receive updates about changes to this lead in your activity stream
Delete	Delete this lead
Convert	Convert a qualified lead into a contact, account, or opportunity

### Record View Actions Menu

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



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

Menu Item	Description
Edit	Edit this lead
Share	Share a link to this lead via email
Download PDF	Download lead information as a PDF file
Email PDF	Email lead information as a PDF attachment
Convert	Convert a qualified lead into a contact, account, or opportunity
Manage Subscriptions	Manage this lead's campaign subscriptions
Download vCard	Download a vCard from Sugar and transfer this lead's information to another application (e.g. Outlook)
Find Duplicates	Locate potential duplicates of this lead
Copy	Duplicate this lead
Historical Summary	View a historical summary of activities



	(e.g. calls, meetings, etc.) related to this lead
View Change Log	View a record of changes to this lead
Delete	Delete this lead

## Lead Capture Forms

Individuals outside of your organization can provide their own information directly into a new lead in your Sugar instance. This can be done via a web-to-lead form posted on your website or via the Sugar Portal.

### Lead Creation via Web-to-Lead Form

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

### Lead Creation via Portal Registration

The Sugar Portal, if activated, allows your customers to file bugs, cases, and review knowledge base articles created in Sugar. When a potential portal user visits the portal login page and completes the registration form, their information is entered into Sugar as a new lead record. For more information on managing the Sugar portal, please refer to the Portal Deployment User Guide documentation.

## Converting Leads

Sugar enables you to convert leads into contacts once they qualify according to your organization's practices (e.g. after an evaluation/qualification process or upon entering into business with the individual). You can convert leads via the Leads record view as well as the Leads subpanel in a related module record (e.g. Accounts). To initiate the conversion process from the Leads subpanel, simply select "Convert" from the Actions menu on the far right of the lead record's row in the subpanel. When the lead is converted, a new contact record is created in Sugar with a relationship to the original lead record. The Convert Lead page also gives you the option to create an account and opportunity record.

Note: The converted status cannot be set directly in the Status field. Rather, the conversion process must be completed.

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Administrators have the ability to configure the Convert Lead layout via Admin > Studio to mark modules as required for conversion, add additional modules (e.g. Notes, Tasks, etc.) to the Convert layout, remove modules, etc. For more information on configuring the Convert layout, please refer to the Studio documentation in the Administration Guide.

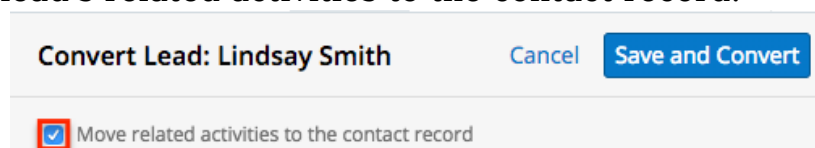
## Lead Conversion Options

The lead's activities can be moved to the contact record created during conversion or left attached only to the lead depending on the lead conversion option selected by your administrator via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.

The lead conversion options available to be enabled by your administrator are as follows:

- **Move** : This option allows all of the lead's activities to be moved the contact record created during the conversion. When enabled, the "Move related activities to the contact record" checkbox will be displayed on the Convert Lead page.
- **Do Nothing** : This option leaves the lead's activities only related to the converted lead.

If the Move option is enabled by your administrator, then the "Move related activities to the contact record" option will be displayed at the top of the Convert Lead page. Please note that the checkbox will be marked by default, but users can simply uncheck the box before converting the lead if they do not wish to move the lead's related activities to the contact record.



Convert Lead: Lindsay Smith      Cancel      Save and Convert

Move related activities to the contact record

Please note that even if "Do Nothing" is selected, emails associated with the lead will still appear under the created contact as long as the lead and contact share the same email address. This is because emails carry an implicit relationship with any record containing an email address matching an address in the From, To, or CC lines of the email record.

## Duplicate Record Check

Sugar automatically checks for any duplicate records (e.g. Contacts) in the system when converting the lead. The Convert Lead page will display any records that are

detected as duplicates in a list view within the panels (e.g. Contact, Account). The first record in the list view will be automatically selected and you can simply click the Select button (e.g. Select Contact) on the upper right of the panel if you wish to relate the existing record to the lead. You can also preview the duplicate record(s) by clicking the Preview icon to the far right of the record's row. For more information on previewing records, please refer to the Preview section of this page.

In addition, the Search bar is available if you wish to perform a list view search for other existing records to relate to the lead. For more information on performing searches, please refer to the Search documentation. Please note that the duplicate check feature is enabled by default in Sugar and cannot be disabled by administrators or users.

Convert Lead: Jeanette McCormick Cancel Save and Convert Preview

1 Contact: 2 duplicates found Ignore and create new Select Contact

Filter Create Search by first name, last name...

Select	Name	Title	Account Name	Email Address	
<input checked="" type="radio"/>	Jeanette McCormick	Sales Manager	Air Safety Inc	j.mccormick@exa	
<input type="radio"/>	Jeanette McCormick	Marketing Manager	XY&Z Funding Inc	jeanette.m@exa	

Preview

**Co** Name  
Jeanette McCormick

Title  
Sales Manager

Mobile  
(510) 226-8900

Department

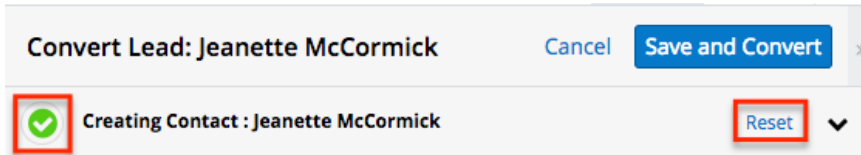
If none of the suggested duplicates are valid, simply click "Ignore and create new". If there are no duplicate records found for required modules (e.g. Contacts, Accounts) in lead conversion, the new record will be automatically associated to the lead and the panel will be collapsed. The record view layout will be pre-populated with the associating record's (e.g. Leads) values (e.g. address).

## Steps to Convert a Lead

Once the lead has been evaluated and qualified, it is ready to be converted to a contact. The panels (e.g. Account) on the Convert Lead page will indicate if any duplicate records are found and display the record(s) in the list view within the panel. If no duplicate records are found, the record (e.g. ABC Company) will be automatically associated to the lead.

As the records are associated to the lead, the panel will collapse and display a check mark to the left of the header. If you wish to reset the association and complete the panel again, simply click the Reset link to the far right of the header, and the check mark will disappear. Please note that the panel you are currently viewing (e.g. Contact) will collapse as you open up a different panel (e.g. Account) on the page.

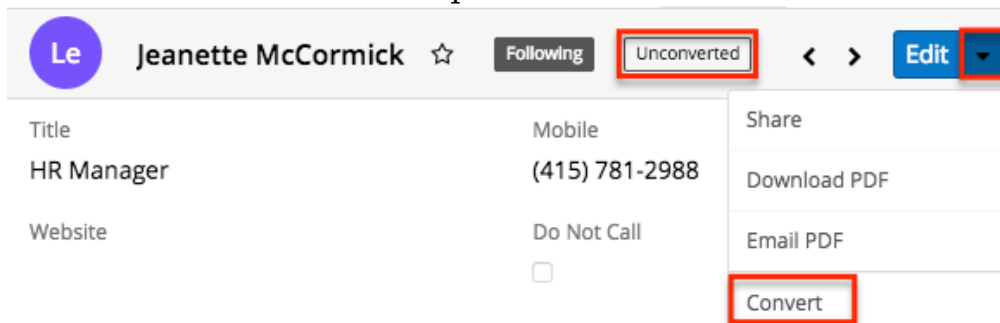




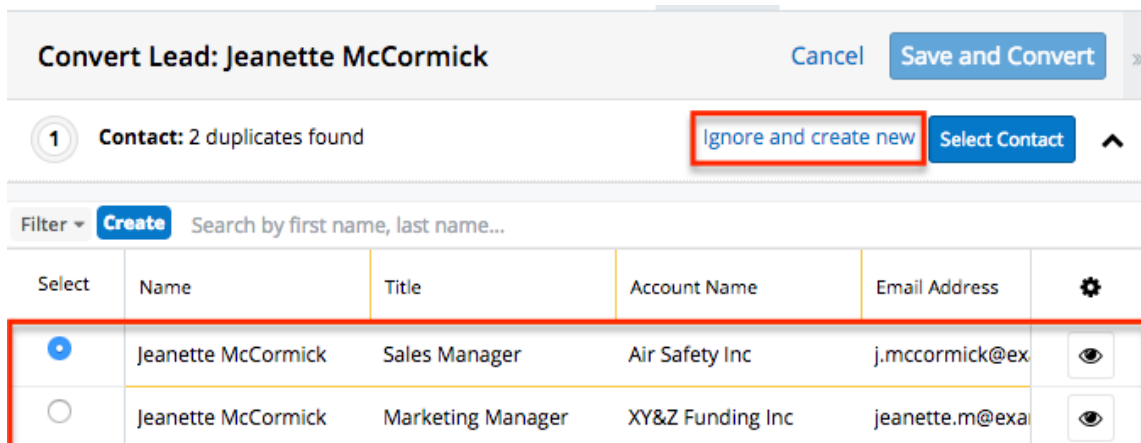
Note: The required modules (Contacts, Accounts) must be associated to the lead before you can save and convert the lead successfully. For more information on enabling and requiring modules for lead conversion, please refer to the Studio documentation in the Administration Guide.

Use the following steps to convert a lead via the Leads record view:

1. Navigate to a Leads record view.
2. Select "Convert" from the Actions menu or click the Unconverted button to initiate the lead conversion process.



3. Sugar will perform a duplicate check for any existing records in the various modules.
  - o The duplicate records (if any) will be displayed in a list view within each panel. For more information on duplicate record checks and selecting the record to associate to the lead, please refer to the Duplicate Record Check section above.



4. To create a new Contact record, click "Ignore and create new" on the upper right of the panel. The displayed record view will be pre-populated with the lead's values. Update any necessary fields then click the Create button (e.g. "Create Contact") to relate the new record to the lead.

1 **New Contact:** [Back to duplicates](#) **Create Contact** ^

Salutation: Select... First Name: Jeanette Last Name: McCormick

Title: HR Manager Mobile: (415) 781-2988

Department: Human Resources Do Not Call:

5. If there are no duplicate records found for a required module (e.g. Accounts) in lead conversion, the new record will be automatically associated to the lead and the panel will be collapsed.

Note: The record view layout will be pre-populated with the lead's values (e.g. Address). Simply click the arrow to the far right of the header if you wish to expand the panel and view or alter the new record's details.

**Convert Lead: Jeanette McCormick** [Cancel](#) **Save and Convert** >

✓ **Creating Contact : Jeanette McCormick** [Reset](#) v

✓ **Creating Account : AtoZ Co Ltd** [Reset](#) v

6. New or existing opportunity records can be related to the lead accordingly. If you wish to relate an existing opportunity to the lead, click "Search" to perform a list view search within the panel. If you wish to create a new record, simply complete the record view in the panel then click "Create Opportunity".

Note: If the Opportunity panel is marked as optional, then no opportunity is required to convert the lead. For more information on setting modules as required on the Convert Lead layout, please refer to the Studio documentation in the Administration Guide.

3 **New Opportunity (optional):** [Search](#) **Create Opportunity** ^

Opportunity Name: AtoZ Co Ltd - 500 units

7. Once all of the necessary information is entered and the appropriate panels are completed, click "Save and Convert".



Convert Lead: Jeanette McCormick Cancel **Save and Convert** >

- ✓ Creating Contact : Jeanette McCormick Reset ▾
- ✓ Creating Account : AtoZ Co Ltd Reset ▾
- ✓ Creating Opportunity : AtoZ Co Ltd - 500 units Reset ▾

Once the lead has been converted successfully, the lead's record view will display the converted contact, account, and opportunity information below the record's detail. You can click the Preview icon to the far right of each record's row to view the details of the converted records.

Please note that the lead conversion can only be performed once in Sugar and once a lead is converted, the lead's status field will display "Converted". The status field becomes read-only upon conversion and cannot be manually changed for the lead.

Le Jeanette McCormick ☆ Following **Converted** < > Edit ▾

Title: Mobile  
HR Manager: (415) 781-2988  
Website: Do Not Call   
Account Name: Email Address  
AtoZ Co Ltd: [j.mccormick@example.com](mailto:j.mccormick@example.com)  
Tags

[Show more...](#)

- Contact: [Jeanette McCormick](#)
- Account: [AtoZ Co Ltd](#)
- Opportunity: [AtoZ Co Ltd - 500 units](#)

## Emails and Leads

Leads include an email address which can be used to email the lead as a recipient. The methods for doing so are covered in the Emailing Records section of the User Interface documentation. Leads may also be recipients of campaigns which allow you to send email messages to a large group of recipients as well as to track the results of that message. Please refer to the Campaigns and Leads section of this page for more information. In addition to being a recipient or sender of an email, leads may be related to emails by being selected in the email's Related To field.



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These relationships allow the lead to display all relevant email correspondence in the Emails subpanel and History dashlet on a case's record view.

## Emails Subpanel

The Emails subpanel in the Leads module displays emails which are associated with the lead record in a variety of ways:

- Explicitly related to the lead : If the lead is selected in the email's Related To field, the email and lead are explicitly related, and the email will appear in the lead's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the Emails documentation.
- Implicitly related to the lead : If one of the lead's email addresses appears in the email's From, To, or Cc fields, the email and lead are implicitly related, and the email will appear in the lead's Emails subpanel and History dashlet. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email leads or email archiving.

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 lead you are currently viewing. The email will automatically select the lead in the Related To field as well as add the lead'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.

The screenshot shows a subpanel for 'EMAILS (5 of 6+)'. The table contains the following records:

	From	Subject	Status	Date	
☆	Sally Bronsen	<a href="#">Demo</a>	Archived	2017-07-14 05:45am	👁️ ▼
☆	Administrator	<a href="#">Discuss pricing</a>	Draft	2017-12-29 02:05pm	👁️ ▼
☆	Sally Bronsen	<a href="#">Introduce all players</a>	Archived	2017-10-12 08:00am	👁️ ▼
☆	Administrator	<a href="#">Demo</a>	Draft	2017-12-29 02:05pm	👁️ ▼
☆	Will Westin	<a href="#">Demo</a>	Archived	2017-03-07 01:00pm	👁️ ▼

More emails...

## Calls, Meetings, and Leads

Leads can be related to calls and meetings in two ways. First, they can be selected in the event's Related To field, indicating that the lead was the topic of the call or meeting. Second, they can be included as invitees to the call or meeting.

### Calls and Meetings Subpanels

Each lead's record view includes a Calls subpanel and a Meetings subpanel. These subpanels display all calls and meetings which include the lead as an attendee. If

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the lead is not an attendee but is selected in the call's or meeting's Related To field, the call or meeting will not appear in the subpanels.

When relating an existing call or meeting to a lead via the subpanels on a lead's record view, the lead will automatically be added as an invitee. When creating a call or meeting from the subpanels, the lead will automatically be added as an attendee and the lead's account will automatically be set in the event's Related To field.

## Campaigns and Leads

Sugar's Campaigns module can be used to send mass emails or a series of newsletter emails to Sugar accounts, contacts, leads, and targets. The results of each campaign are recorded to measure its impact. Leads are not related directly to campaigns. Rather, each campaign is related to several target list records, and each target list is related to leads and other recipients. To send a campaign email to a lead, the lead should belong to a default-type target list associated to the campaign. To prevent a lead from receiving emails from a campaign, the lead should belong to the campaign's suppression list-type target list. Once a campaign is sent, the results specific to a particular lead will appear in the Campaign Log Subpanel on the lead's record view as described in the Campaign Log Subpanel section of this page.

Leads can be added to target lists via the target list record itself, from the Leads list view using the Add To Target List option, or from the Leads record view using the Manage Subscription option. Instructions for using the Add To Target List and

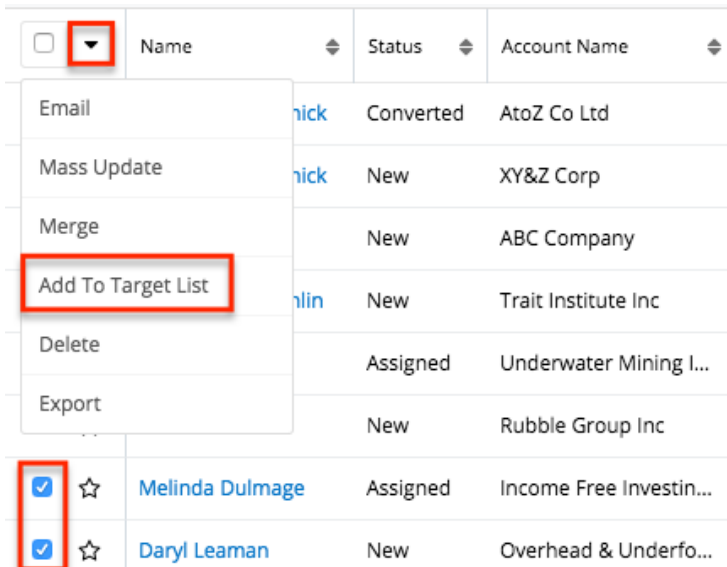
### Adding to a Target List via Leads List View

A target list consists of a group of individuals or organizations you wish to be included in or excluded from a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to add leads to a target list in Sugar including using the Add To Target List option from the Lead list view's Mass Actions Menu. For more information on target lists and other methods of adding leads, please refer to the Target Lists documentation.

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

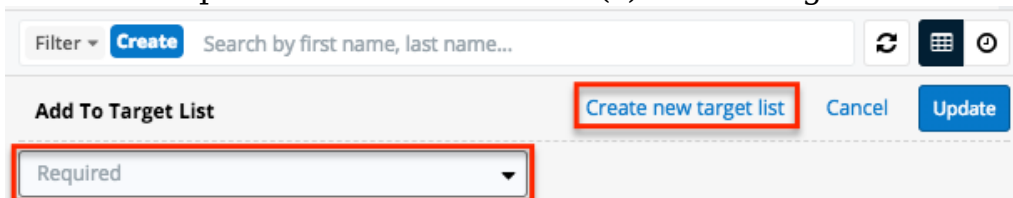
Use the following steps to add leads to a target list via the Leads list view:

1. Navigate to the Leads list view by clicking the Leads module tab.
2. Use the List View Search to find the Lead records you wish to add to a target list.
3. Select the desired lead records then choose "Add to Target List" from the Mass Actions menu.



<input type="checkbox"/>	Name	Status	Account Name
<input type="checkbox"/>	nick	Converted	AtoZ Co Ltd
<input type="checkbox"/>	nick	New	XY&Z Corp
<input type="checkbox"/>		New	ABC Company
<input checked="" type="checkbox"/>	lin	New	Trait Institute Inc
<input type="checkbox"/>		Assigned	Underwater Mining I...
<input type="checkbox"/>		New	Rubble Group Inc
<input checked="" type="checkbox"/>	Melinda Dulmage	Assigned	Income Free Investin...
<input checked="" type="checkbox"/>	Daryl Leaman	New	Overhead & Underfo...

4. Below the search bar, locate and select the desired target list in the dropdown list or click "Create new target list" to add the leads to a new target list. Click "Update" to add the record(s) to the target list.

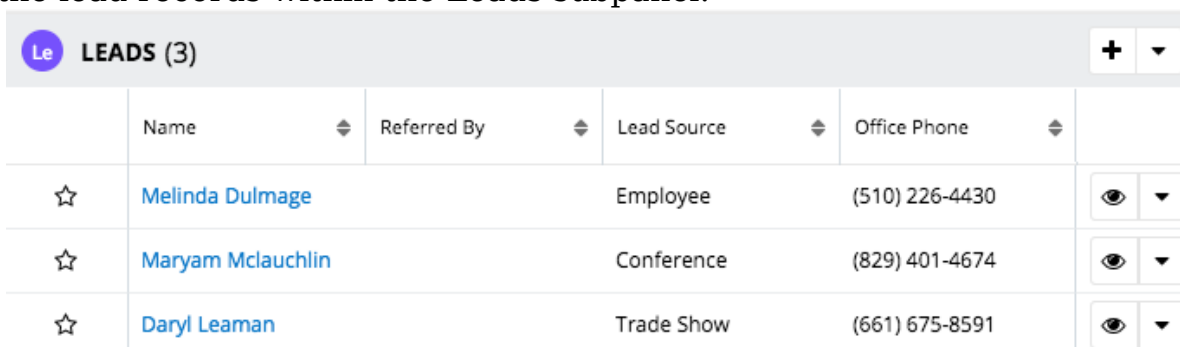


Filter **Create** Search by first name, last name...

**Add To Target List** **Create new target list** Cancel **Update**

Required

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



Le LEADS (3)				
	Name	Referred By	Lead Source	Office Phone
☆	Melinda Dulmage		Employee	(510) 226-4430
☆	Maryam Mclauchlin		Conference	(829) 401-4674
☆	Daryl Leaman		Trade Show	(661) 675-8591

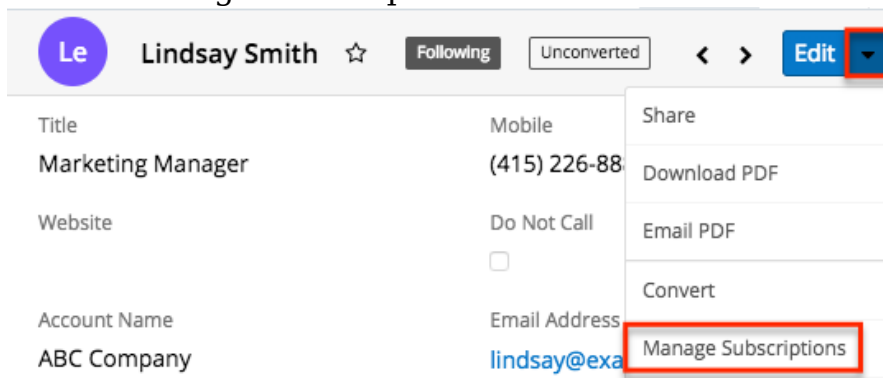
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## Managing Lead Subscriptions

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

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

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



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

### Manage Subscriptions



5. Click "Save" to preserve your changes.

---

## Campaign Log Subpanel

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

The Campaign Log subpanel allows the following functions to be performed:

- **Campaign Details** : To view the details of a campaign, click its name to open it in detail view.
- **Record Count** : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- **Collapse or Expand** : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
  - **Note:** Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.
- **Column Widths** : Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- **Column Sort** : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).
- **More Records** : By default, Sugar displays up to five records in each subpanel though administrators can alter the number via Admin > System Settings as described in the System documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g. More campaign log...) at the bottom of the subpanel to load the next set of records.

CL Campaign Log (2 of 3+)			
Campaign	Activity Type	Activity Date	Related
Summer 2015 Specials	Message Sent/Attempted	2015-08-05 09:51	Summer 2015 Specials
Summer 2015 Specials	Message Sent/Attempted	2015-08-05 09:51	Summer 2015 Specials

[More campaign log...](#)

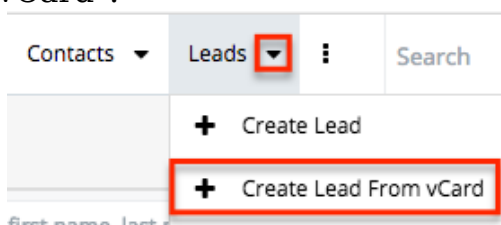
## vCards and Leads

vCards are electronic business cards that are exchanged between applications such as email and web browsers. Leads may be created from vCards generated by another application or saved as vCards for use in other software.

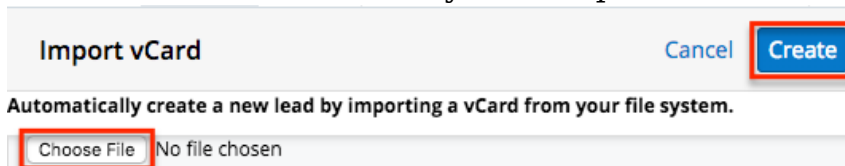
### Creating Leads via vCard

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

1. Click the triangle in the Leads module tab and select "Create Lead From vCard".



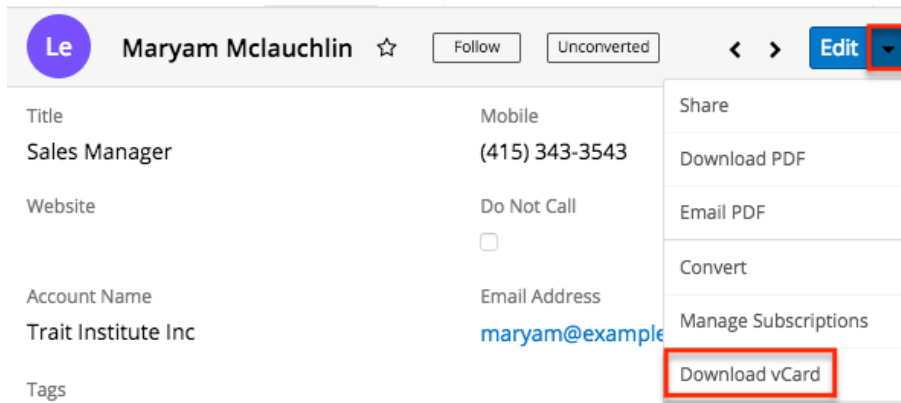
2. Choose the vCard file from your computer and click "Create".



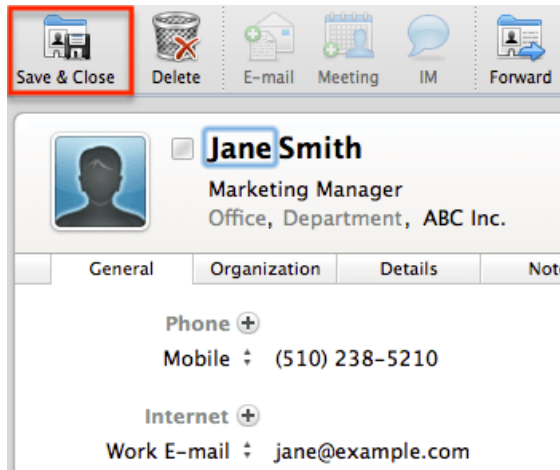
### Downloading a Lead's vCard

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

1. Navigate to a Leads record view.
2. Select "Download vCard" from the Actions menu to download the vCard file.



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



Last Modified: 2018-01-24 18:51:54

## 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



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contacts, please refer to the Working With Contacts 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. 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
Campaign	The campaign, if any, from which the contact originated
Confirm Portal Password	When editing, confirmation of the contact's password for accessing Sugar Portal
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
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
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 / Lotus Notes / etc.

	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 Contacts

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 Contacts section describe Contacts-specific behaviors and functionality.

Content Link	Description
<a href="#">Creating Contacts</a> <a href="#">Basic Contact Creation</a> <a href="#">Creating via Quick Create</a> <a href="#">Creating via Subpanels</a> <a href="#">Creating via Duplication</a> <a href="#">Importing Contacts</a>	The Creating Records section covers the various methods of creating new contact records, including via the Create button in the Contacts module, the Quick Create menu on the upper right of every Sugar page, via the Contacts subpanel on related module records, duplication of an existing contact record, and importing a list of contacts into Sugar using a .csv spreadsheet.
<a href="#">Viewing Contacts</a> <a href="#">Viewing via List View</a> <a href="#">Viewing via Record View</a> <a href="#">Viewing via Recently Viewed</a> <a href="#">Viewing via Dashlets</a> <a href="#">Viewing via Activity Streams</a> <a href="#">Viewing via Preview</a> <a href="#">Viewing via Reports</a>	The Viewing Records section describes the various methods of viewing contact records, including via the Contacts list view and record view, the Recently Viewed menu in the Contacts module tab, list view dashlets showing contact information, activity stream entries concerning contact updates or where a user mentions a contact, previewing

	contacts in the right-hand side panel, and reports displaying contact data.
<p>Searching for Contacts</p> <ul style="list-style-type: none"> <li>Global Search</li> <li>List View Search</li> <li>Creating a Filter</li> <li>Saving a Filter</li> </ul>	<p>The Searching for Records section provides an introduction to the two searching methods for locating contacts: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Contacts module.</p>
<p>Contacts List View</p> <ul style="list-style-type: none"> <li>Total Record Count</li> <li>Create Button</li> <li>List View Search</li> <li>Checkbox Selection</li> <li>Mass Actions Menu</li> <li>Favorite Designation</li> <li>Column Reordering</li> <li>Column Resizing</li> <li>Column Sorting</li> <li>Column Selection</li> <li>Preview</li> <li>Record Actions Menu</li> <li>More Contacts</li> <li>Activity Stream</li> <li>Dashboards</li> </ul>	<p>The List View section walks through the many elements of the Contacts List View layout which contains a filterable list of all contact 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 Contacts list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.</p>
<p>Contacts Record View</p> <ul style="list-style-type: none"> <li>Favorite Designation</li> <li>Following Designation</li> <li>Next or Previous Record</li> <li>Actions Menu</li> <li>Show More</li> <li>Subpanels</li> <li>Related Record Subpanels</li> <li>Filtering Subpanels</li> <li>Reordering Subpanels</li> <li>Activity Stream</li> <li>Dashboards</li> </ul>	<p>The Record View section walks through the many elements of the Contacts Record View layout which contains detailed information about a single contact record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Contacts record view are described in the Record View Actions Menu section of this page.</p>
<p>Editing Contacts</p> <ul style="list-style-type: none"> <li>Editing Inline via Record View</li> <li>Editing via Record View</li> <li>Editing Inline via Subpanels</li> <li>Editing Inline via List View</li> <li>Mass Editing via List View</li> <li>Editing Fields</li> </ul>	<p>The Editing Records section describes the various methods of editing existing contact records, including inline via the Contacts record view, in full edit mode on the record view, inline via the Contacts subpanel on related module records, inline via the Contacts list view,</p>

	and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.
<p>Deleting Contacts</p> <p>Deleting via Record View</p> <p>Deleting via List View</p> <p>Mass Deleting via List View</p>	The Deleting Records section describes the various methods of deleting unwanted contacts, including via the Contacts record view, an individual record's Actions menu on the Contacts list view, and the Mass Actions menu on the list view.
<p>Emailing Contacts</p> <p>Emailing via Email Address Fields</p> <p>Emailing via List View</p> <p>Emailing via Quick Create</p> <p>Emailing via Emails Module</p> <p>Emailing via Workflows</p>	The Emailing Records section describes the various methods of emailing contact records as recipients, including clicking any email address within Sugar, via the Mass Actions menu on the Contacts list view, via the Quick Create menu, via the Emails module using the Related To field, and via workflows which can automatically send emails according to conditions configured by administrator users.
Exporting Contacts	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of contacts 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 Contacts	The Finding Duplicate Records section provides instructions for locating duplicate contact records. If searching on matching fields (e.g. Last Name) identifies one or more duplicates, they can be merged into a single record.
<p>Merging Contacts</p> <p>Merging via List View</p>	The Merging Records section provides instructions for merging duplicate contacts which will combine field values

	and related records into a single contact.
Viewing Contact Historical Summaries	The Viewing Record Historical Summaries section describes the Historical Summary record view option which displays quick details of the contact record's related calls, meetings, emails, notes, and tasks.
Viewing Contact Change Logs	The Viewing Record Change Logs section describes the View Change Log record view option which displays a history of changes to the contact's audited fields.
Contact PDFs Downloading Contact PDFs Emailing Contact PDFs	The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of contact information as configured by an administrator via Admin > PDF Manager.
Favoriting Contacts Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking contacts as favorites, including via the Contacts list view, Contacts record view, or any Contacts subpanel appearing on the record view of a related module. Favoriting a contact allows you to easily access it from list views, dashlets, or the Contacts module tab.
Following Contacts Following via List View Following via Record View	The Following Records section describes the various methods of marking contacts as "Following", including via the Contacts list view and record view. Following a contact causes its activity stream updates to be included on your Home page and Contacts list view activity streams so that you can easily keep up with changes and user posts on the record.
Sharing Contacts	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the contact record. If the recipient is logged into Sugar, clicking

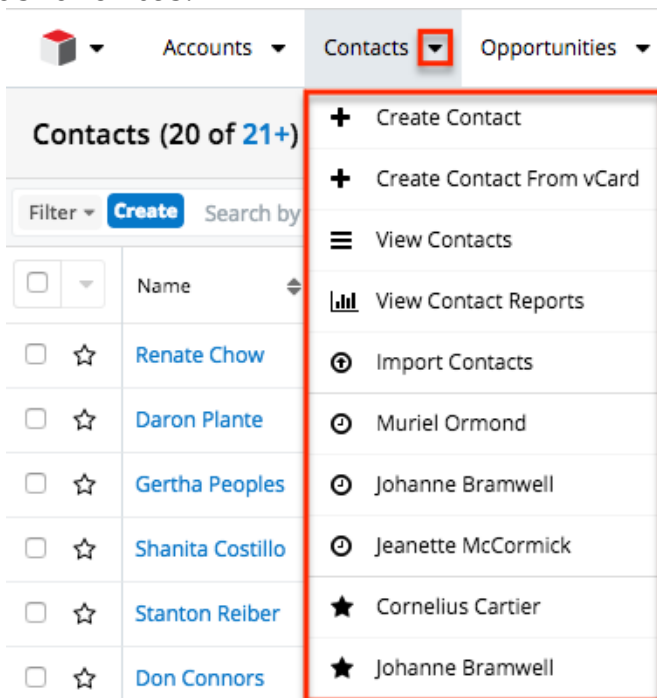
the link will bring them directly to the contact's record view.

## Contact Menu

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

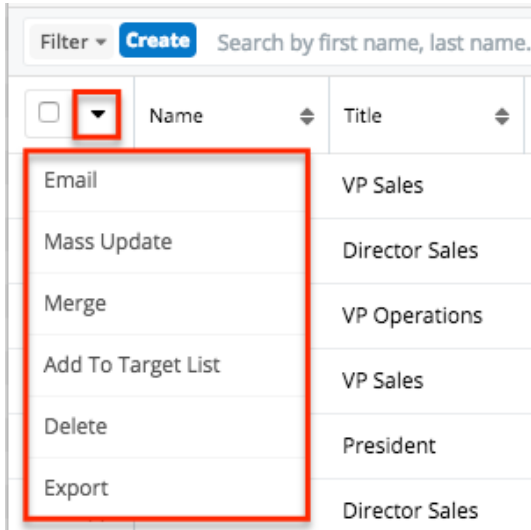
The Contacts list view displays all contact records and allows for searching and filtering to locate specific contacts. You can view the basic details of each record within the field columns of the list view or click a contact's name to open the record view. To access a module's list view, simply click 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
Add to Target List	Add one or more contacts to a target list
Delete	Delete one or more contacts at a time
Export	Export one or more contacts to a CSV file
Recalculate Values	(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.



Name	Title	Account Name	Email Address	Actions
<a href="#">Johanne Bram...</a>	VP Operations	<a href="#">Insight Marketi...</a>	<a href="#">johanne@exa...</a>	<input type="checkbox"/> ▼
<a href="#">Tierra Palin</a>	President	<a href="#">Tracker Com LP</a>	<a href="#">info</a>	Edit
<a href="#">Sanford Bristol</a>	IT Developer	<a href="#">Hammer Grou...</a>	<a href="#">veg</a>	Follow
<a href="#">Trish Basta</a>	President	<a href="#">Hammer Grou...</a>	<a href="#">pho</a>	Delete

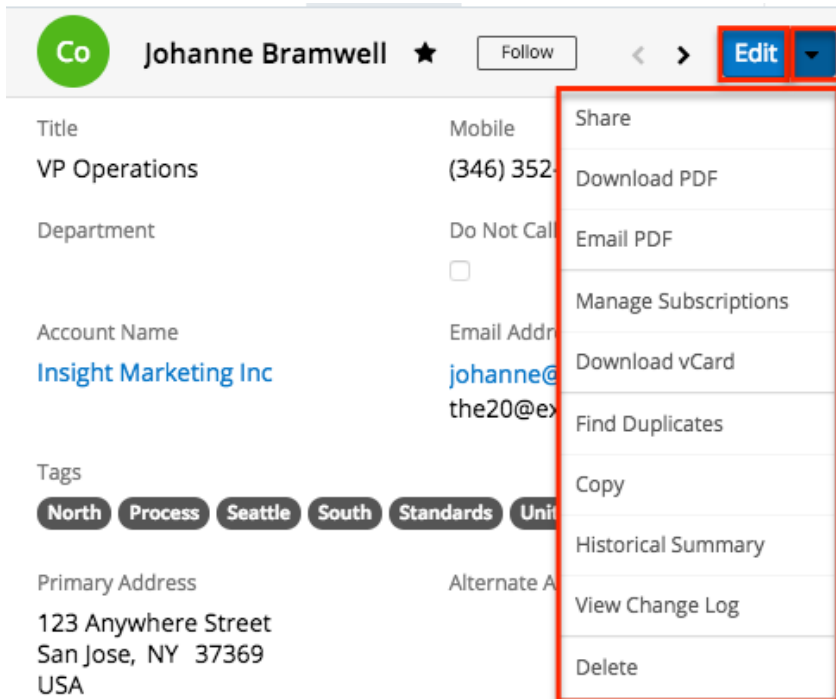
The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this contact in the intelligence pane
Edit	Edit this contact
Follow	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 Change Log	View a record of changes to this contact
Delete	Delete this contact

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## 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. Contacts may also be recipients of campaigns which allow you to send email messages to a large group of recipients as well as to track the results of that message. Please refer to the Campaigns and Contacts section of this page for more information. In addition to being a recipient or sender of an email, contacts may be related to emails by being selected in the email's Related To field. These relationships allow the contact to display all relevant email correspondence in the Emails subpanel and History dashlet on a contact's record view.

### Emails Subpanel

The Emails subpanel in the Contacts module displays emails which are associated with the contact record in a variety of ways:

- Explicitly related to the contact : If the contact is selected in the email's Related To field, the email and contact are explicitly related, and the email will appear in the contact's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the Emails documentation.
- Implicitly related to the contact : If one of the contact's email addresses appears in the email's From, To, or Cc fields, the email and contact are implicitly related, and the email will appear in the contact's Emails subpanel and History dashlet. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email contacts or email archiving.

The Emails subpanel allows the following functions to be performed:

- Email Details : To view the details of an email, click the subject to open it in detail view.
- Record Count : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- Collapse or Expand : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the

module.

- Note: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.
- Column Widths : Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- Column Sort : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).
- Compose a New Email : Click the Plus button on the upper right of a subpanel to create a new email with, by default, both an implicit and explicit relationship to the contact you are currently viewing. The email will automatically select the contact in the Related To field as well as add the contact's primary email address as a recipient in the To field.
  - Note: To send email from Sugar, users must configure their outbound email server via Emails > Email Settings or, if using the system email account to send email, the system's outbound email server must be configured by an administrator in Admin > System Email Settings.
  - Note: Because creating a new related record opens a drawer on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- More Records : By default, Sugar displays up to five records in each subpanel, though administrators can alter the number via Admin > System Settings as described in the System documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g. "More Emails...") at the bottom of the subpanel to load the next set of records.

Related ▾ All Filter All Records Search...

Em **EMAILS (5 of 6+)** +

	From	Subject	Status	Date	
☆	Sally Bronsen	<a href="#">Demo</a>	Archived	2017-07-14 05:45am	👁️ ▾
☆	Administrator	<a href="#">Discuss pricing</a>	Draft	2017-12-29 02:05pm	👁️ ▾
☆	Sally Bronsen	<a href="#">Introduce all players</a>	Archived	2017-10-12 08:00am	👁️ ▾
☆	Administrator	<a href="#">Demo</a>	Draft	2017-12-29 02:05pm	👁️ ▾
☆	Will Westin	<a href="#">Demo</a>	Archived	2017-03-07 01:00pm	👁️ ▾

[More emails...](#)



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## Calls, Meetings, and Contacts

Contacts can be related to calls and meetings in two ways. First, they can be selected in the event's Related To field, indicating that the contact was the topic of the call or meeting. Second, they can be included as invitees to the call or meeting.

### Calls and Meetings Subpanels

Each contact's record view includes a Calls subpanel and a Meetings subpanel. These subpanels display all calls and meetings which include the contact as an attendee. If the contact is not an attendee but is selected in the call's or meeting's Related To field, the call or meeting will not appear in the subpanels.

When relating an existing call or meeting to a contact via the subpanels on a contact's record view, the contact will automatically be added as an invitee. When creating a call or meeting from the subpanels, the contact will automatically be added as an attendee and the contact's account will automatically be set in the event's Related To field.

## Campaigns and Contacts

Sugar's Campaigns module can be used to send mass emails or a series of newsletter emails to Sugar accounts, contacts, leads, and targets. The results of each campaign are recorded to measure its impact. Contacts are not related directly to campaigns. Rather, each campaign is related to several target list records, and each target list is related to contacts and other recipients. To send a campaign email to a contact, the contact should belong to a default-type target list associated to the campaign. To prevent a contact from receiving emails from a campaign, the contact should belong to the campaign's suppression list-type target list. Once a campaign is sent, the results specific to a particular contact will appear in the Campaign Log Subpanel on the contact's record view as described in the Campaign Log Subpanel section of this page.

Contacts can be added to target lists via the target list record itself, from the Contacts list view using the Add To Target List option, or from the Contacts record view using the Manage Subscriptions option. Instructions for using the Add To Target List and Manage Subscriptions options in the Contacts module are provided in the sections below. For instructions on other available methods of adding to target lists, please refer to the Target Lists documentation.

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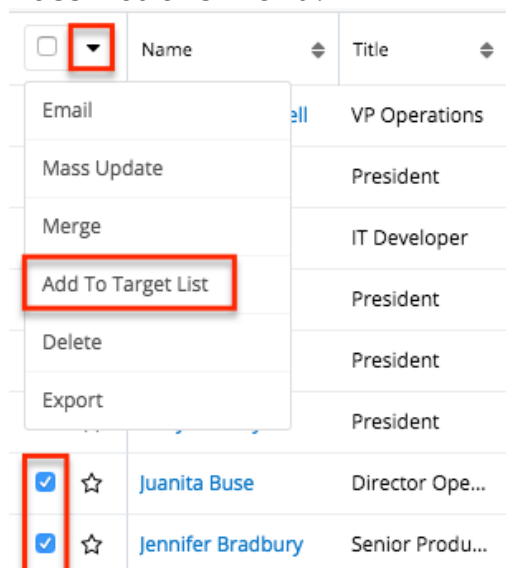
## Adding to a Target List via Contacts List View

A target list consists of a group of individuals or organizations you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to add contacts to a target list in Sugar including using the Add To Target List option from the Contact list view's Mass Actions Menu. For more information on target lists and other methods of adding contacts, please refer to the Target Lists documentation.

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

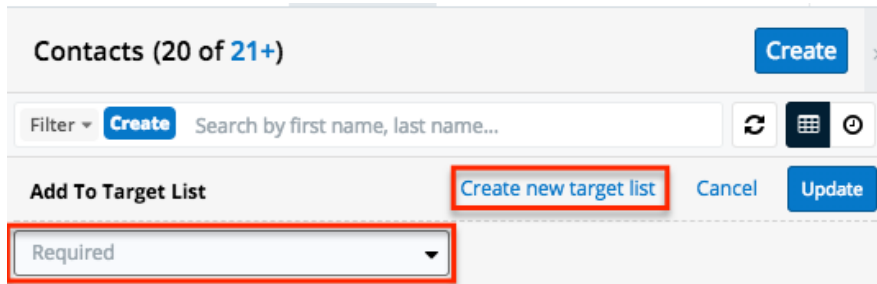
Use the following steps to add accounts to a target list via the Contacts list view:

1. Navigate to the Contacts list view by clicking the Contacts module tab.
2. Use the List View Search to find the Contact records you wish to add to a target list.
3. Select the desired contact records then choose "Add to Target List" from the Mass Actions menu.

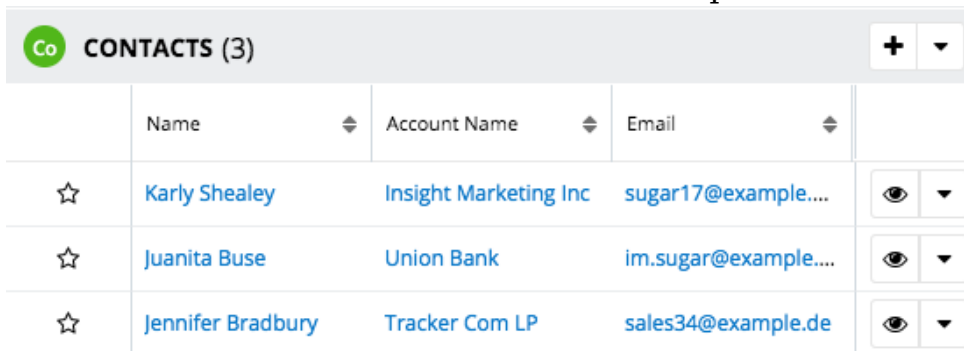


4. Below the search bar, locate and select the desired target list in the dropdown list or click "Create new target list" to add the contacts to a new target list. Click "Update" to add the record(s) to the target list.





In order to view the contacts that have been added, you can navigate to the Target Lists module. Click the target list's name to open the record view, and you will see the contact records within the Contacts subpanel.



	Name	Account Name	Email	
☆	Karly Shealey	Insight Marketing Inc	sugar17@example...	👁️ ▼
☆	Juanita Buse	Union Bank	im.sugar@example...	👁️ ▼
☆	Jennifer Bradbury	Tracker Com LP	sales34@example.de	👁️ ▼

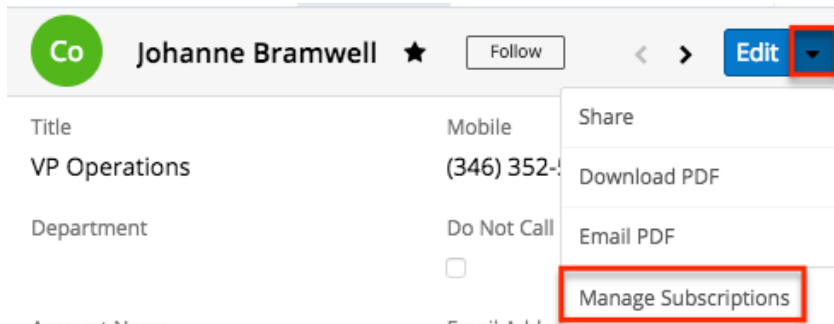
## Managing Contact Subscriptions

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

Use the following steps to manage contact subscriptions via a contact's record view:

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





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

[Manage Subscriptions](#)



5. Click "Save" to preserve your changes.

## Campaign Log Subpanel

The Campaign Log subpanel contains historical information regarding a contact's interaction with all Sugar campaigns. When a mass marketing campaign is sent to a contact (or manually marked as sent in the case of non-email campaigns), the related campaign activity information will appear within the Campaign Log subpanel on the contact's record view. This information mirrors the "View Status" page available from within each individual campaign and shows activities such as when a campaign was sent, when the recipient viewed the campaign message, when the recipient clicked a tracked link within the campaign, etc. Since this

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subpanel contains historical campaign interactions for the contact, it cannot be used to associate a contact with a campaign or otherwise manage a campaign or target list. For more information on associating a contact with a campaign, please refer to the Adding to a Target List via Contacts List View section of this page. For more information on campaigns, please refer to the Campaigns documentation.

The Campaign Log subpanel allows the following functions to be performed:

- Campaign Details : To view the details of a campaign, click its name to open it in detail view.
- Record Count : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- Collapse or Expand : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
  - Note: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.
- Column Widths : Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- Column Sort : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).
- More Records : By default, Sugar displays up to five records in each subpanel though administrators can alter the number via Admin > System Settings as described in the System documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g. "More campaign log...") at the bottom of the subpanel to load the next set of records.

Campaign	Activity Type	Activity Date	Related
<a href="#">Summer 2015 Specials</a>	Message Sent/Attempted	2015-08-05 09:51	<a href="#">Summer 2015 Specials</a>
<a href="#">Summer 2015 Specials</a>	Message Sent/Attempted	2015-08-05 09:51	<a href="#">Summer 2015 Specials</a>

[More campaign log...](#)

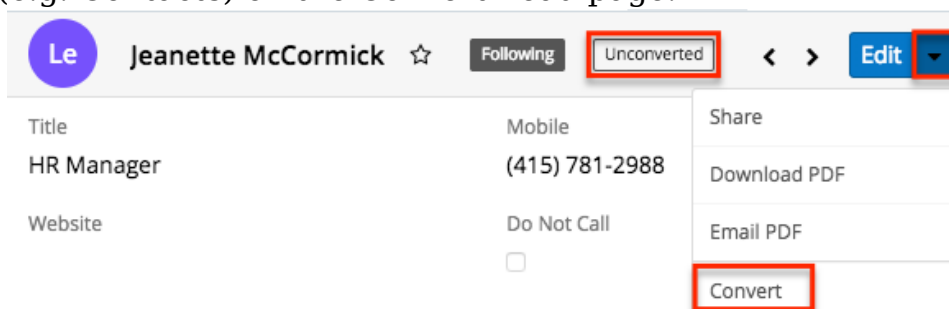
## Converting Leads to Contacts

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

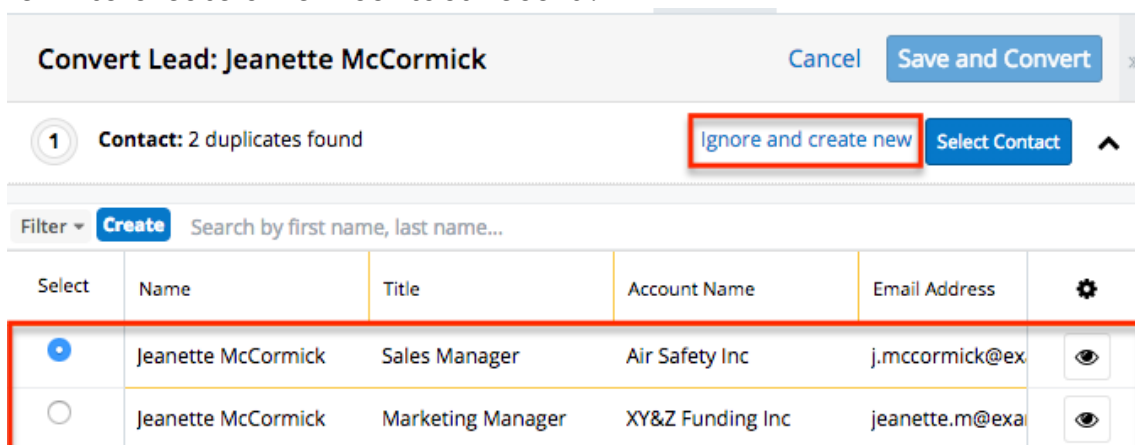
Use the following steps to convert leads into contacts:

1. Navigate to a lead's record view.
2. Select "Convert" from the Actions menu or click the Unconverted button to initiate the lead conversion process.

Note: Sugar will automatically perform a duplicate check for the modules (e.g. Contacts) on the Convert Lead page.



3. If there are no duplicate records found for a module (e.g. Contacts), the new record will be automatically marked for creation on the Convert Lead page and associated to the lead. The panel will be collapsed as well, but you can click the header to open the panel and view the record's details.
4. If there are duplicate records found for a module (e.g. Contacts), they will display in a list view within the panel. You can select an existing contact, or if none of the suggested duplicates are valid, simply click "Ignore and create new" to create a new contact record.



5. Some of the fields (e.g. address, phone) on the displayed record view will be



pre-populated with the lead's values. Simply update any necessary fields then click the Create Contact button.

1 **New Contact:** [Back to duplicates](#) **Create Contact** ^

**Salutation** **First Name** **Last Name**  
Select... Jeanette McCormick

**Title** **Mobile**  
HR Manager (415) 781-2988

**Department** **Do Not Call**  
Human Resources

6. Complete the other module panels (Accounts, Opportunities) accordingly on the Convert Lead page.
7. Once all of the necessary information is entered and the appropriate panels are completed, click "Save and Convert".

Once the lead has been converted successfully, the lead's record view will display the converted contact, account, and opportunity information below the record's detail. You can click the Preview icon to the far right of each record's row to view the details of the converted contact and other records.

Le Jeanette McCormick ☆ Following **Converted** < > Edit ▾

**Title** **Mobile**  
HR Manager (415) 781-2988

**Website** **Do Not Call**

**Account Name** **Email Address**  
AtoZ Co Ltd j.mccormick@example.com

**Tags**

[Show more...](#)

Contact: [Jeanette McCormick](#)

Account: [AtoZ Co Ltd](#)

Opportunity: [AtoZ Co Ltd - 500 units](#)

## 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

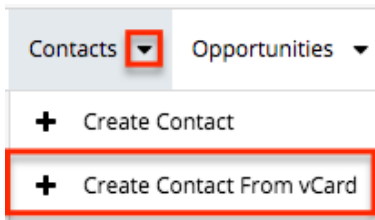
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by another application or saved as vCards for use in other software.

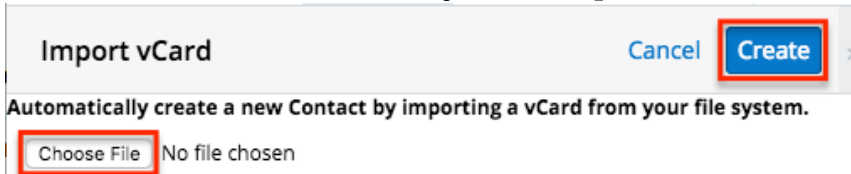
## Creating Contacts via vCard

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".



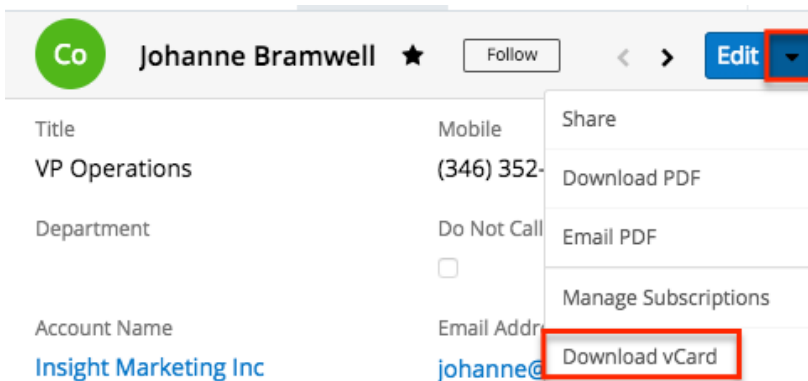
2. Choose the vCard file from your computer and click "Create".



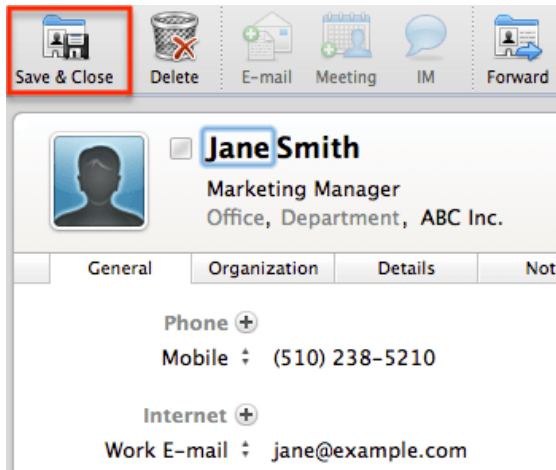
## Downloading a Contact's vCard

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.



Last Modified: 2018-01-24 18:53:27

## 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 Accounts 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. 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
Campaign	The campaign, if any, from which the account originated
Copy Address From Left	Select the box to copy the account's billing address to the shipping address field
Date Created	The date the account record was created
Date Modified	The date the account record was last modified
Description	A description or other information about the account
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
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 Accounts

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 Accounts section describe Accounts-specific behaviors and functionality.

Content Link	Description
<a href="#">Creating Accounts</a> <a href="#">Basic Account Creation</a> <a href="#">Creating via Quick Create</a> <a href="#">Creating via Subpanels</a> <a href="#">Creating via Duplication</a> <a href="#">Importing Accounts</a>	The Creating Records section covers the various methods of creating new account records, including via the Create button in the Accounts module, the Quick Create menu on the upper right of every Sugar page, via the Accounts subpanel on related module records, duplication of an existing account record, and importing a list of accounts into Sugar using a .csv spreadsheet.
<a href="#">Viewing Accounts</a> <a href="#">Viewing via List View</a> <a href="#">Viewing via Record View</a>	The Viewing Records section describes the various methods of viewing account records, including via the Accounts list

<p>Viewing via Recently Viewed Viewing via Dashlets Viewing via Activity Streams Viewing via Preview Viewing via Reports</p>	<p>view and record view, the Recently Viewed menu in the Accounts module tab, list view dashlets showing account information, activity stream entries concerning account updates or where a user mentions an account, previewing accounts in the right hand side panel, and reports displaying account data.</p>
<p>Searching for Accounts Global Search List View Search Creating a Filter Saving a Filter</p>	<p>The Searching for Records section provides an introduction to the two searching methods for locating accounts: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Accounts module.</p>
<p>Accounts 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 Accounts Activity Stream Dashboards</p>	<p>The List View section walks through the many elements of the Accounts List View layout which contains a filterable list of all account 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 Accounts list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.</p>
<p>Accounts 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</p>	<p>The Record View section walks through the many elements of the Accounts Record View layout which contains detailed information about a single account record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Accounts record view are described in the Record View Actions Menu section of this page.</p>
<p>Editing Accounts</p>	<p>The Editing Records section describes</p>

<p>Editing Inline via Record View  Editing via Record View  Editing Inline via Subpanels  Editing Inline via List View  Mass Editing via List View  Editing Fields</p>	<p>the various methods of editing existing account records, including inline via the Accounts record view, in full edit mode on the record view, inline via the Accounts subpanel on related module records, inline via the Accounts list view, and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.</p>
<p>Deleting Accounts  Deleting via Record View  Deleting via List View  Mass Deleting via List View</p>	<p>The Deleting Records section describes the various methods of deleting unwanted accounts, including via the Accounts record view, an individual record's Actions menu on the Accounts list view, and the Mass Actions menu on the list view.</p>
<p>Emailing Accounts  Emailing via Email Address Fields  Emailing via List View  Emailing via Quick Create  Emailing via Emails Module  Emailing via Workflows</p>	<p>The Emailing Records section describes the various methods of emailing account records as recipients, including clicking any email address within Sugar, via the Mass Actions menu on the Accounts list view, via the Quick Create menu, via the Emails module using the Related To field, and via workflows which can automatically send emails according to conditions configured by administrator users.</p>
<p>Exporting Accounts</p>	<p>The Exporting Records section provides an introduction to the export functionality which allows you to download a list of accounts and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).</p>
<p>Recalculating Calculated Values</p>	<p>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 &gt; Studio.</p>
<p>Finding Duplicate Accounts</p>	<p>The Finding Duplicate Records section provides instructions for locating duplicate account records. If searching</p>

	on matching fields (e.g. Name) identifies one or more duplicates, they can be merged into a single record.
Merging Accounts Merging via List View	The Merging Records section provides instructions for merging duplicate accounts which will combine field values and related records into a single account.
Viewing Account Historical Summaries	The Viewing Record Historical Summaries section describes the Historical Summary record view option which displays quick details of the account record's related calls, meetings, emails, notes, and tasks.
Viewing Account Change Logs	The Viewing Record Change Logs section describes the View Change Log record view option which displays a history of changes to the account's audited fields.
Account PDFs Downloading Account PDFs Emailing Account PDFs	The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of account information as configured by an administrator via Admin > PDF Manager.
Favoriting Accounts Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking accounts as favorites, including via the Accounts list view, Accounts record view, or any Accounts subpanel appearing on the record view of a related module. Favoriting an account allows you to easily access it from list views, dashlets, or the Accounts module tab.
Following Accounts Following via List View Following via Record View	The Following Records section describes the various methods of marking accounts as "Following", including via the Accounts list view and record view. Following an account causes its activity stream updates to be included on your Home page and Accounts list view activity streams so that you can easily keep up with changes and user posts on



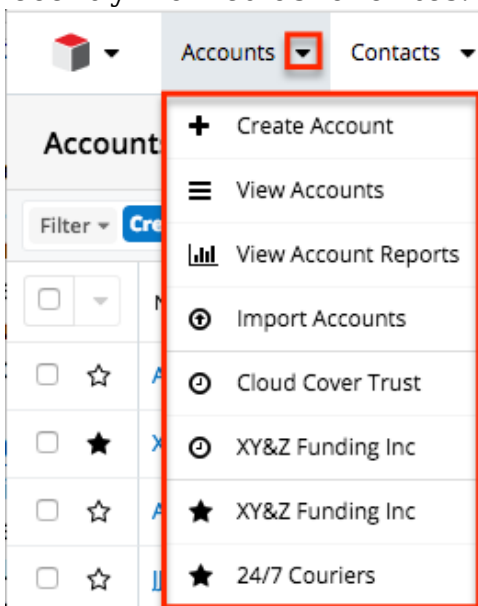
	the record.
Sharing Accounts	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the account record. If the recipient is logged into Sugar, clicking the link will bring them directly to the account's record view.

## 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.

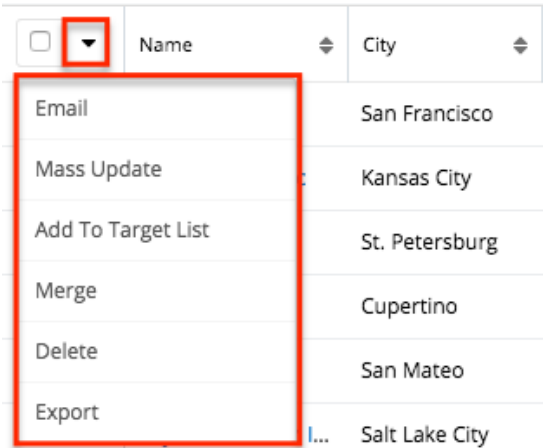
## List View Menus

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.



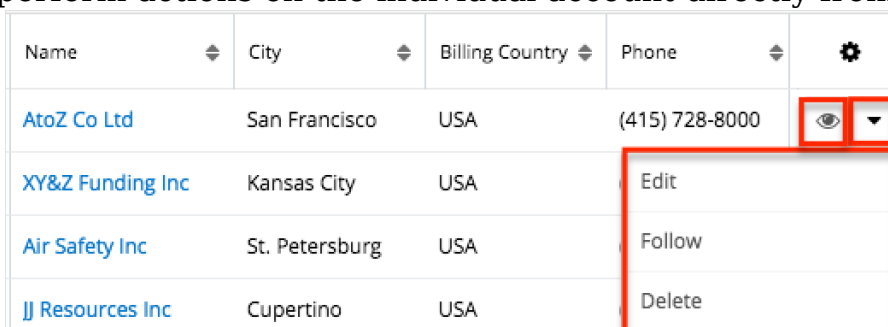


The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Email	Email one or more accounts at a time
Mass Update	Mass update one or more accounts at a time
Add to Target List	Add one or more accounts to a target list
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.

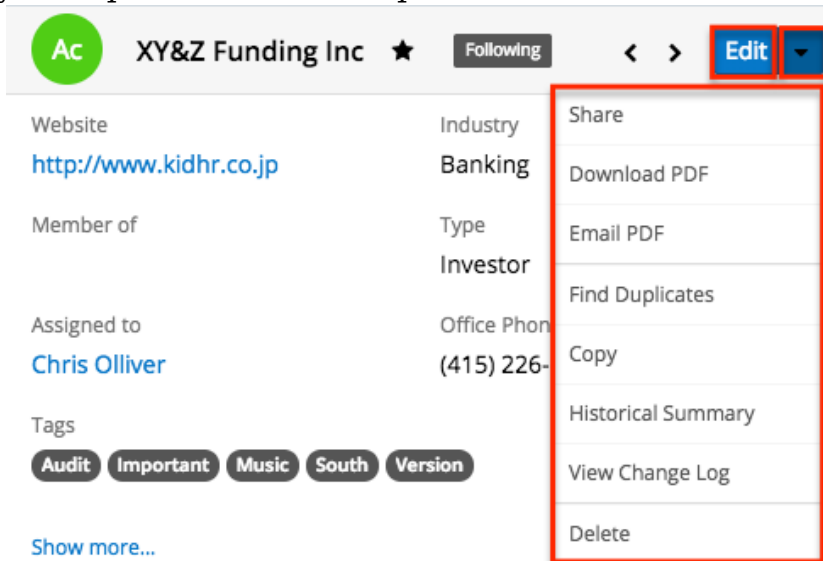


The list view's Record Actions menu allows you to perform the following operations:

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 Change Log	View a record of changes to this account
Delete	Delete this account

## Emails and Accounts

Accounts include an email address which can be used to email the account as a recipient. The methods for doing so are covered in the Emailing Records section of the User Interface documentation. Accounts may also be recipients of campaigns which allow you to send email messages to a large group of recipients as well as to track the results of that message. Please refer to the Campaigns and Accounts section of this page for more information. In addition to being a recipient or sender of an email, accounts may be related to emails by being selected in the email's Related To field. These relationships allow the account to display all relevant email correspondence in the Emails subpanel and History dashlet on an account's record view. An account's Emails subpanel and History dashlet may also display emails belonging to the contacts related to the account.

### Emails Subpanel

The Emails subpanel in the Accounts module displays emails which are associated with the account record in a variety of ways:

- Explicitly related to the account : If the account is selected in the email's Related To field, the email and account are explicitly related, and the email will appear in the account's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the Emails documentation.
- Implicitly related to the account : If one of the account's email addresses appears in the email's From, To, or Cc fields, the email and account are implicitly related, and the email will appear in the account's Emails subpanel and History dashlet. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email accounts or email archiving.
- Related to the account's related contacts : If the email is related, either explicitly or implicitly, to a contact record which belongs to the account, the

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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.





Related ▾ All Filter All Records Search...						↺	📅	🔔
Em EMAILS (5 of 6+)						+		
	From	Subject	Status	Date				
☆	Sally Bronsen	Demo	Archived	2017-07-14 05:45am	👁	▾		
☆	Administrator	Discuss pricing	Draft	2017-12-29 02:05pm	👁	▾		
☆	Sally Bronsen	Introduce all players	Archived	2017-10-12 08:00am	👁	▾		
☆	Administrator	Demo	Draft	2017-12-29 02:05pm	👁	▾		
☆	Will Westin	Demo	Archived	2017-03-07 01:00pm	👁	▾		
More emails...								

## Campaigns and Accounts

Sugar's Campaigns module can be used to send mass emails or a series of newsletter emails to Sugar accounts, contacts, leads, and targets. The results of each campaign are recorded to measure its impact. Accounts are not related directly to campaigns. Rather, each campaign is related to several target list records, and each target list is related to accounts and other recipients. To send a campaign email to an account, the account should belong to a default-type target list associated to the campaign. To prevent an account from receiving emails from a campaign, the account should belong to the campaign's suppression list-type target list. Once a campaign is sent, the results specific to a particular account will appear in the Campaign Log Subpanel on the account's record view as described in the Campaign Log Subpanel section of this page.

Accounts can be added to target lists via the target list record itself or from the Accounts list view as described below. For instructions on other available methods of adding to target lists, please refer to the Target Lists documentation.

### Adding to a Target List via Accounts List View

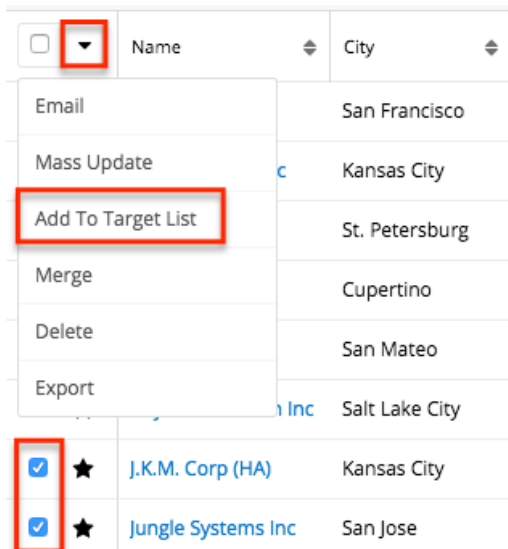
A target list consists of a group of individuals or organizations you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to add accounts to a target list in Sugar including using the Add To Target List option from the Account list view's Mass Actions Menu. For more information on target lists and other methods of adding accounts, please refer to the Target Lists

documentation.

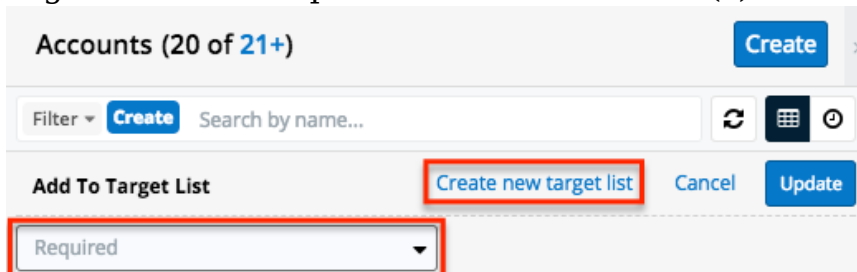
You can use the Select All feature in the list view when adding to a target list, which will allow you to easily select the first 1000 records in the result set. If you wish to add more than 1000 records or add a specific group of records to the target list, please use the filter option in list view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

Use the following steps to add accounts to a target list via the Accounts list view:

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 add to a target list.
3. Select the desired account records then choose "Add to Target List" from the Mass Actions menu.



4. Below the search bar, locate and select the desired target list in the dropdown list or click "Create new target list" to add the accounts to a new target list. Click "Update" to add the record(s) to the target list.



In order to view the accounts that have been added, you can navigate to the Target Lists module. Click the target list's name to open the record view, and you will see the account records within the Accounts subpanel.



Ac ACCOUNTS (3) <span style="float: right;">+ ▼</span>				
	Name	Phone	Email	
★	<a href="#">XY&amp;Z Funding Inc</a>	(415) 226-8888	<a href="mailto:the.support.dev@e...">the.support.dev@e...</a>	▼
★	<a href="#">J.K.M. Corp (HA)</a>	(375) 275-8268	<a href="mailto:kid82@example.de">kid82@example.de</a>	▼
★	<a href="#">Jungle Systems Inc</a>	(374) 315-6162	<a href="mailto:phone.support@ex...">phone.support@ex...</a>	▼

## Campaign Log Subpanel

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

The Campaign Log subpanel allows the following functions to be performed:

- **Campaign Details** : To view the details of a campaign, click its name to open it in detail view.
- **Record Count** : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- **Collapse or Expand** : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
  - **Note:** Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.
- **Column Widths** : Place your cursor on the column divider. When the double

arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.

- **Column Sort** : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).
- **More Records** : By default, Sugar displays up to five records in each subpanel though administrators can alter the number via Admin > System Settings as described in the System documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g. "More campaign log...") at the bottom of the subpanel to load the next set of records.

Campaign	Activity Type	Activity Date	Related
Summer 2015 Specials	Message Sent/Attempted	2015-08-05 09:51	Summer 2015 Specials
Summer 2015 Specials	Message Sent/Attempted	2015-08-05 09:51	Summer 2015 Specials

[More campaign log...](#)

## Leads and Accounts

Once a lead has been evaluated and qualified, it can be converted into an account in addition to a contact and opportunity. Please note that Sugar automatically checks for any duplicate records in the system when converting the lead. So the Convert Lead page will display any records that are detected as duplicates in a list view within the module panels (e.g. Account). You can either select the existing record or create a new record as necessary. For more information on lead conversion and creating new records, please refer to the Leads documentation.

**Convert Lead: Lindsay Smith** [Cancel](#) [Save and Convert](#)

**Creating Contact : Lindsay Smith** [Reset](#)

**2** **Account: 1 duplicates found** [Ignore and create new](#) [Select Account](#)

Filter [Create](#) Search by name...

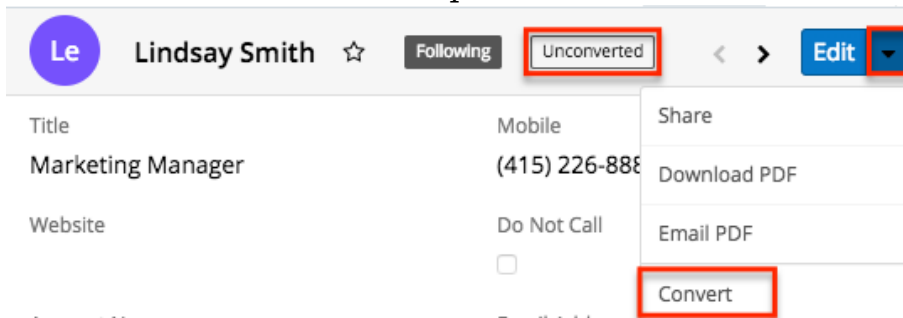
Select	Name	City	Billing Country	
<input checked="" type="radio"/>	ABC Company	San Francisco	USA	

## Creating via Lead Conversion

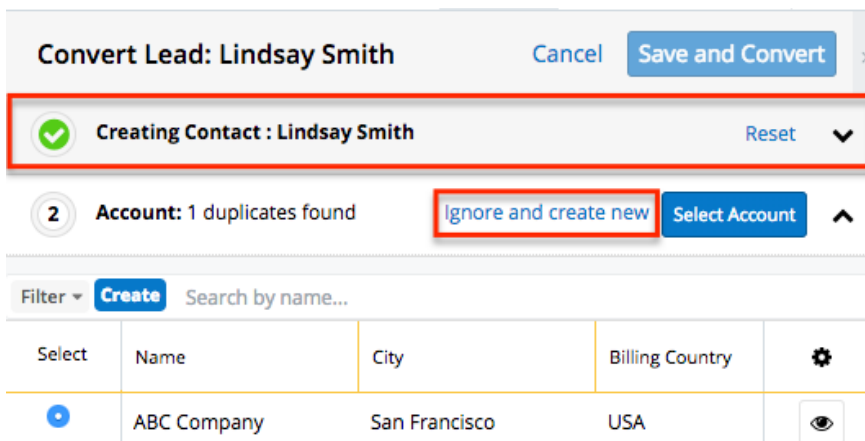
Sugar enables you to create a new account record during the lead conversion process. For more information about lead conversion, please refer to the Leads documentation.

Use the following steps to create an account during lead conversion:

1. Navigate to a Leads record view.
2. Select "Convert" from the Actions menu or click the Unconverted button to initiate the lead conversion process.



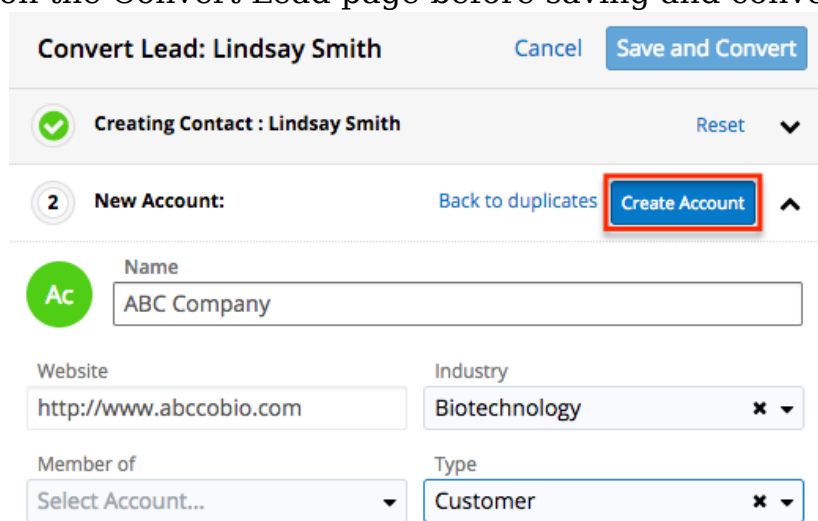
3. If there are no duplicate records found for a module (e.g. Contacts) in lead conversion, the new record will be automatically marked for creation on the Convert Lead page and associated to the lead. The panel will be collapsed as well, but you can click the header to open the panel and view the record's details.
4. If there are duplicate records found for a module (e.g. Accounts), you can either select an existing account or create a new account record if none of the suggested duplicates are valid. Click "Ignore and create new" to create a new account record.



5. Some of the fields (e.g. address, phone, etc.) on the displayed record view will be pre-populated with the lead's values. Simply update any necessary fields then click the Create Account button.

Note: You can click "Save and Convert" at the top of the page if you wish to convert the lead at this point. However, if you wish to create or relate an opportunity record to the lead as well, please complete the Opportunity panel

on the Convert Lead page before saving and converting.



**Convert Lead: Lindsay Smith** Cancel Save and Convert

Creating Contact : Lindsay Smith Reset

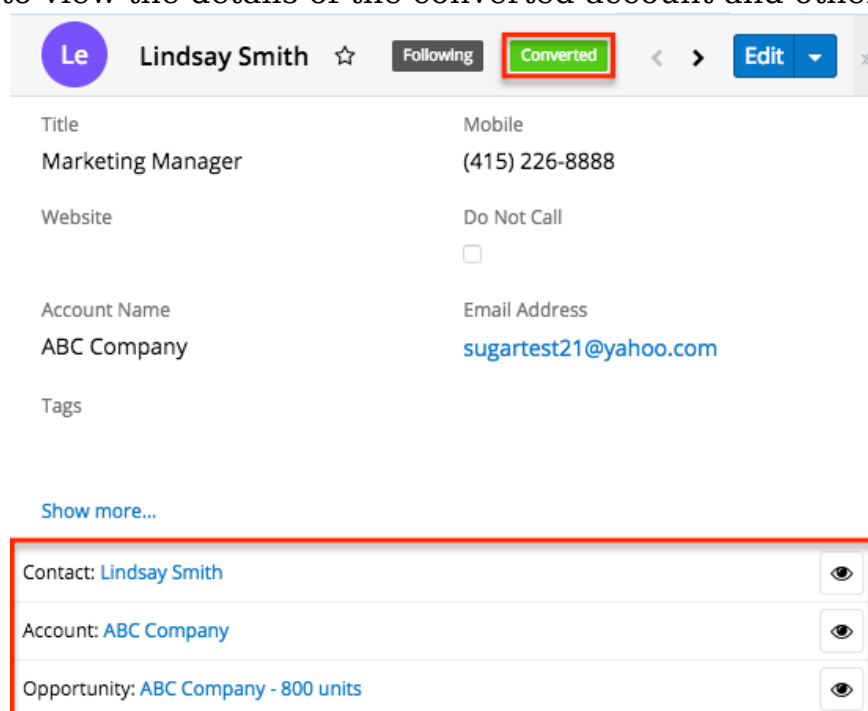
2 New Account: Back to duplicates **Create Account**

Name  
ABC Company

Website: http://www.abccobio.com Industry: Biotechnology

Member of: Select Account... Type: Customer

Once the lead has been converted successfully, the lead's record view will display the converted contact, account, and opportunity information below the record's detail. You can click the Preview icon to the far right of each record's row to view the details of the converted account and other records.



Le Lindsay Smith Following **Converted** Edit

Title: Marketing Manager Mobile: (415) 226-8888

Website: Do Not Call

Account Name: ABC Company Email Address: sugartest21@yahoo.com

Tags

Show more...

Contact: Lindsay Smith

Account: ABC Company

Opportunity: ABC Company - 800 units

Last Modified: 2018-01-24 18:53:46

## Revenue Line Items

### Overview

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Sugar's Revenue Line Items module consists of individual line items of potential business which are included on an opportunity record and tracked through the sales life cycle. The opportunity record acts as a header for one or more revenue line item records. This allows for greater granularity when working opportunities and forecasting since each line item within an opportunity can have its own sales stage and probability as well as being included or excluded from a user's forecasting worksheet individually. For more information about how opportunities and revenue line items interact, please refer to the Opportunities and Revenue Line Items section of this page.

Each revenue line item may be related to a product from your organization's Product Catalog. Doing so will cause the product's values to automatically populate matching fields on the revenue line item. For more information, please refer to the

This documentation will cover information and actions specific to the Revenue Line Items module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting line items, please refer to the Working With Revenue Line Items section of this page.

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

Note: If your instance is configured to use opportunities alone without revenue line items, please refer to the Opportunities documentation in the Professional edition Application Guide. For more information about changing your opportunities model via Admin > Opportunities, please see the Opportunities Configuration documentation in the Administration Guide.

## Revenue Line Item Fields

The Revenue Line Items module contains a number of stock fields which come out-of-the-box with Sugar. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration Guide.

Field	Description
Account Name	The account to which the related opportunity belongs



	<p>This value is automatically populated based on the selected opportunity's related account and may not be manually modified.</p>
Assigned To	<p>The Sugar user assigned to the revenue line item</p>
Associated Quote	<p>The quote that was generated based on this revenue line item</p> <p>Each revenue line item may only be included on a single quote which may only be generated once.</p>
Best	<p>The most optimistic amount that may be won for the revenue line item</p> <p>The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Revenue Line Items section of this page.</p> <p>If no value is provided, the Best field will be automatically filled with the value of the Likely field or the value of the Calculated Revenue Line Item Amount field.</p> <p>Unless the sales stage is set to "Closed Lost", the revenue line item's Best value will roll up into the parent opportunity.</p>
Calculated Revenue Line Item Amount	<p>The amount calculated from the unit price, quantity, and discount which serves as a guide for determining the Likely, Best, and Worst values.</p> <p>The value is populated based on the unit price, quantity, and discount amount and may not be manually modified.</p>

Campaign	The campaign, if any, from which the revenue line item opportunity originated
Category	<p>The category to which the revenue line item's product belongs</p> <p>Note: The default value is populated with the Parent value of a selected product and may be modified manually. For more information on creating product categories, please refer to the Products and Quotes documentation in the Administration Guide.</p>
Cost	<p>The actual cost of the revenue line item's product</p> <p>The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Revenue Line Items section of this page.</p> <p>Note: The value is automatically populated based on the selected product and may not be modified manually</p>
Date Created	The date the revenue line item record was created
Date Modified	The date the revenue line item record was last modified
Description	A description or other information about the revenue line item
Expected Close Date	The date when the revenue line item is expected to close or already has closed
Forecast	<p>The revenue line item's commit range for forecasting (e.g. "Include", "Exclude", etc.)</p> <p>Note: The available values are</p>

	determined by the Ranges configuration in Admin > Forecasts. For more information on configuring forecasting ranges, please refer to the Forecasts documentation in the Administration Guide.
Lead Source	The source (e.g. Trade Show) from which the revenue line item opportunity originated
Likely	<p>The most likely amount that may be won for the revenue line item</p> <p>The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Revenue Line Items section of this page.</p> <p>If no value is provided, the Likely field will be automatically filled with the value of the Calculated Revenue Line Item Amount field.</p> <p>Unless the sales stage is set to "Closed Lost", the revenue line item's Likely value will roll up into the parent opportunity.</p>
List Price	<p>The list price of the revenue line item's selected product</p> <p>Note: The value is automatically populated based on the selected product and may not be modified manually</p>
Mft Part Number	The manufacturer's part number for the revenue line item's product, if any, selected from the Product Catalog
Modified by Name	The Sugar user who last modified the revenue line item record

Next Step	The succeeding stage of the revenue line item's sales cycle
Opportunity Name	The opportunity to which the revenue line item belongs
Probability (%)	The revenue line item's current likelihood of being won  Note: This value is calculated based on the selected Sales Stage and cannot be edited.
Product	The product's name as selected from the product catalog list or manually entered as new  Note: For more information on creating and managing the product catalog, please refer to the Products and Quotes
Quantity	The number of products being purchased
Sales Stage	The revenue line item's current state in the sales process (e.g. Prospecting, Qualification, etc.)  Note: When the revenue line item's sales stage is set to "Closed Lost", the values (e.g. Likely, Best, etc.) associated with the revenue line item no longer roll up into the parent opportunity.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports Note: For more information on creating and using tags, please refer to the Tags documentation.
Tax Class	Tax classification (e.g. taxable, non-taxable) for the revenue line item's product, if any, selected from the Product Catalog  Note: When a product is selected, the value is automatically populated based on the value defined in the Product Catalog and may not be modified

	manually
Teams	The Sugar team(s) assigned to the revenue line item record
Total Discount Amount	The amount of the discount provided for the revenue line item
Type	The type of the revenue line item's business (e.g. New Business or Old Business)
Unit Price	<p>The unit price of the revenue line item's product</p> <p>The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Revenue Line Items section of this page.</p> <p>Note: The default value is automatically generated based on the formula defined in the Product Catalog and may not be modified manually</p>
Weight	The weight of the product, if any, selected from the Product Catalog
Worst	<p>The least optimistic amount that may be won for the revenue line item</p> <p>The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Revenue Line Items section of this page.</p>

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If no value is provided, the Worst field will be automatically filled with the value of the Likely field or the Calculated Revenue Line Item Amount field.

Unless the sales stage is set to "Closed Lost", the revenue line item's Worst value will roll up into the parent opportunity.

## Sales Stages

A sales stage identifies the current stage (e.g. Prospecting, Qualification, etc.) that the revenue line item is in during the sales cycle. When you select a sales stage in the revenue line item record, the system automatically populates the corresponding probability value (e.g. 10, 20, etc.) in the Probability (%) field. These probability values are a useful tool as it helps calculate and predict your sales forecast for a specified time period. For more information on the Forecasts module, please refer to the Forecasts documentation. Administrators have the ability to configure the sales stage and probability values for each sales stage via Admin > Dropdown Editor. For more information, please refer to the Adding Custom Sales Stages and Probabilities to Opportunities article.

Please note that the below values are only guidelines for defining your sales stage, and you can skip one or more stages based on your organization's needs.

Sales Stage	Probability	Suggested Definition
Prospecting	10	This is the first stage in the sales process and indicates that the opportunity or revenue line item with this prospect is new and needs to be qualified by a sales representative.
Qualification	20	The sales representative is currently interacting with the prospect to determine if a sales opportunity exists.
Needs Analysis	25	After determining that the prospect has an interest in

		the products or services, the sales representative now uncovers the prospect's business challenges.
Value Proposition	30	After uncovering the prospect's business challenges, the sales representative now maps the company's products and/or services to the prospect's business challenges and describes the value of the solution.
Id. Decision Makers	40	After determining that there is a match between the prospect's business challenges and the company's products and/or services, the sales representative now identifies the decision makers necessary to close this opportunity or revenue line item.
Perception Analysis	50	The sales representative analyzes the prospect's perceived value of the company's solution at this stage in order to prepare the appropriate combination of products and services for the sales quote.
Proposal/Price Quote	65	The sales representative delivers the proposal, sometimes called the price quote, to the prospect.
Negotiation/Review	80	The sales representative reviews and negotiates the proposal with the prospect.
Closed Won	100	The sales representative has won this opportunity

		or revenue line item and the company can now bill the customer.
Closed Lost	0	The sales representative has lost this opportunity or revenue line item.

## Working With Revenue Line Items

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 Revenue Line Items section describe Revenue Line Items-specific behaviors and functionality.

Content Link	Description
<a href="#">Creating Revenue Line Items</a> <a href="#">Basic Revenue Line Item Creation</a> <a href="#">Creating via Quick Create</a> <a href="#">Creating via Subpanels</a> <a href="#">Creating via Duplication</a> <a href="#">Importing Revenue Line Items</a>	The Creating Records section covers the various methods of creating new revenue line item records, including via the Create button in the Revenue Line Items module, the Quick Create menu on the upper right of every Sugar page, via the Revenue Line Items subpanel on related modules, duplication of an existing revenue line item record, and importing a list of revenue line items into Sugar using a .csv spreadsheet.
<a href="#">Viewing Revenue Line Items</a> <a href="#">Viewing via List View</a> <a href="#">Viewing via Record View</a> <a href="#">Viewing via Recently Viewed</a> <a href="#">Viewing via Activity Streams</a> <a href="#">Viewing via Preview</a> <a href="#">Viewing via Reports</a>	The Viewing Records section describes the various methods of viewing revenue line item records, including via the Revenue Line Items list view and record view, the Recently Viewed menu in the Revenue Line Items module tab, activity stream entries concerning revenue line item updates or where a user mentions a revenue line item, previewing revenue line items in the right hand side panel, and reports displaying revenue line item data.
<a href="#">Searching for Revenue Line Items</a> <a href="#">Global Search</a> <a href="#">List View Search</a> <a href="#">Creating a Filter</a> <a href="#">Saving a Filter</a>	The Searching for Records section provides an introduction to the two searching methods for locating revenue line items: global search, which searches across all Sugar modules, and



	list view search, which searches and filters within the Revenue Line Items module.
Revenue Line Items List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview Record Actions Menu More Revenue Line Items Activity Stream Dashboards	The List View section walks through the many elements of the Revenue Line Items List View layout which contain a filterable list of all revenue line item 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 Revenue Line Items list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.
Revenue Line Items Record View Favorite Designation Following Designation Next or Previous Record Actions Menu Show More Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Activity Stream Dashboards	The Record View section walks through the many elements of the Revenue Line Items Record View layout which contain detailed information about a single revenue line item record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Revenue Line Items record view are described in the Record View Actions Menu section of this page.
Editing Revenue Line Items Editing Inline via Record View Editing via Record View Editing Inline via Subpanels Editing Inline via List View Mass Editing via List View Editing Fields	The Editing Records section describes the various methods of editing existing revenue line item records, including inline via the Revenue Line Items record view, in full edit mode on the record view, inline via the Revenue Line Items subpanel on related module records, inline via the Revenue Line Items list view, and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.

<p>Deleting Revenue Line Items  Deleting via Record View  Deleting via List View  Mass Deleting via List View</p>	<p>The Deleting Records section describes the various methods of deleting unwanted revenue line items, including via the Revenue Line Items record view, an individual record's Actions menu on the Revenue Line Items list view, and the Mass Actions menu on the list view.</p> <p>Note: A revenue line item may be deleted only if its Status field is not set to "Closed Won" or "Closed Lost". For data integrity purposes, closed revenue line items may not be deleted.</p>
<p>Exporting Revenue Line Items</p>	<p>The Exporting Records section provides an introduction to the export functionality which allows you to download a list of revenue line items and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).</p>
<p>Recalculating Calculated Values</p>	<p>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 &gt; Studio.</p>
<p>Finding Duplicate Revenue Line Items</p>	<p>The Finding Duplicate Records section provides instructions for locating duplicate revenue line item records. If searching on matching fields (e.g. Name) identifies one or more duplicates, they can be merged into a single record.</p>
<p>Merging Revenue Line Items  Merging via List View</p>	<p>The Merging Records section provides instructions for merging duplicate revenue line items which will combine field values and related records into a single revenue line item.</p>
<p>Viewing Revenue Line Item Historical Summaries</p>	<p>The Viewing Record Historical Summaries section describes the Historical Summary record view option which displays quick details of the revenue line item record's related calls, meetings, emails, notes, and tasks.</p>

Viewing Revenue Line Item Change Logs	The Viewing Record Change Logs section describes the View Change Log record view option which displays a history of changes to the revenue line item's audited fields.
Revenue Line Item PDFs Downloading Revenue Line Item PDFs Emailing Revenue Line Item PDFs	The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of revenue line item information as configured by an administrator via Admin > PDF Manager.
Favoriting Revenue Line Items Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking revenue line items as favorites, including via the Revenue Line Items list view, Revenue Line Items record view, or any Revenue Line Items subpanel appearing on the record view of a related module. Favoriting a revenue line item allows you to easily access it from list views, dashlets, or the Revenue Line Items module tab.
Following Revenue Line Items Following via List View Following via Record View	The Following Records section describes the various methods of marking revenue line items as "Following", including via the Revenue Line Items list view and record view. Following a revenue line item causes its activity stream updates to be included on your Home page and Revenue Line Items list view activity streams so that you can easily keep up with changes and user posts on the record.
Sharing Revenue Line Items	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the revenue line item record. If the recipient is logged into Sugar, clicking the link will bring them directly to the revenue line item's record view.

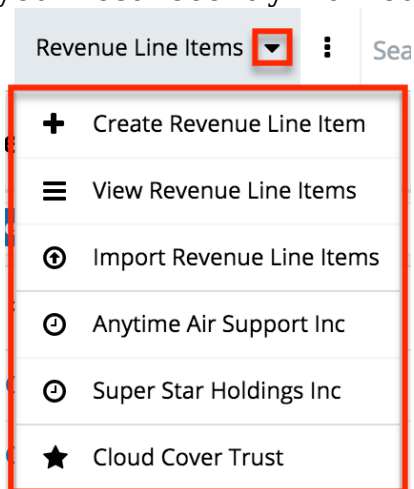
## Revenue Line Item Menus

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

## Module Tab Menus

The Revenue Line Items module tab is typically located under the More tab of the navigation bar at the top of any Sugar screen. Sugar normally displays the top six modules shown in the Display Modules list of your user preferences with the remaining displayed modules grouped under the More tab. For more information on displayed modules for the navigation bar, please refer to the Layout Options section of the Getting Started documentation.

Click the tab to access the Revenue Line Items list view. You may also click the triangle in the Revenue Line Items tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of revenue line items you most recently viewed. The Favorites menu displays the list of revenue line items you most recently marked as favorites.



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

Menu Item	Description
Create Revenue Line Item	Opens the record view layout to create a new revenue line item
View Revenue Line Items	Opens the list view layout to search and display revenue line items
Import Revenue Line Items	Opens the import wizard to create or update revenue line items using

If you do not see the Revenue Line Items module tab in Sugar, please check the following:

- The Revenue Line Items 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 Revenue Line Items 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 Revenue Line Items module for your entire Sugar instance. Reach out to your Sugar administrator to have the Revenue Line Items 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 Revenue Line Items list view displays all revenue line item records and allows for searching and filtering to locate specific revenue line items. You can view the basic details of each record within the field columns of the list view or click a revenue line item's name to open the record view. To access a module's list view, simply click the module's tab in the navigation bar at the top of any Sugar page.

## List View Mass Actions Menu

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

<input type="checkbox"/>	Revenue Line It...	Sales Stage	Product	Likely	
<input type="checkbox"/>		Prospecting	Corazon Gadget		▼
<input type="checkbox"/>		Closed Lost	TK 1000 Desktop		▼
<input type="checkbox"/>		Perception Ana...	Ilda Gadget		▼
<input type="checkbox"/>		Perception Ana...	Ilda Gadget		▼
<input type="checkbox"/>		Negotiation/Re...	Gia Gadget	€4,191.00	▼

- Mass Update
- Recalculate Values
- Merge
- Delete
- Export

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

Menu Item	Description
Mass Update	Mass update one or more revenue line items at a time
Merge	Merge two or more duplicate revenue line items
Delete	Delete one or more revenue line items at a time
Export	Export one or more revenue line items to a CSV file
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 revenue line item directly from the list view.

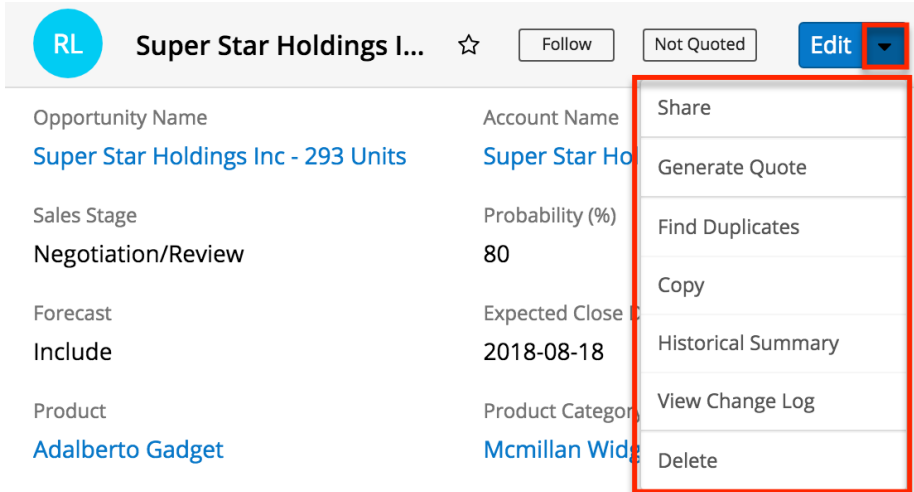
<input type="checkbox"/>	Revenue Line It...	Sales Stage	Product	Likely	⚙️
<input type="checkbox"/>	Chandler Logist...	Prospecting	Corazon Gadget		👁️ ▼
<input type="checkbox"/>	Cloud Cover Tr...	Closed Lost	TK 1000 Deskt...		<ul style="list-style-type: none"> <li>Edit</li> <li>Follow</li> <li>Delete</li> </ul>
<input type="checkbox"/>	Cloud Cover Tr...	Perception Ana...	Ilda Gadget		
<input type="checkbox"/>	Cloud Cover Tr...	Perception Ana...	Ilda Gadget		

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

Menu Item	Description
Preview (Eye icon)	Preview this revenue line item in the intelligence pane
Edit	Edit this revenue line item
Follow	Follow this revenue line item
Delete	Delete this revenue line item

## Record View Actions Menu

The Revenue Line Items record view displays a single revenue line item in full detail including its fields, subpanels of related records, and activity stream. To access a revenue line item's record view, simply click a hyperlinked revenue line item name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this revenue line item.
Share	Share a link to this revenue line item via email.  Note: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Download PDF	Download the record's information as a PDF file.  <ul style="list-style-type: none"> <li>This menu option is only visible if the administrator has created a PDF template for the Revenue Line Items module via Admin &gt; PDF Manager.</li> <li>Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF</li> </ul>

	templates.
Email PDF	<p>Email the record's information as a PDF attachment.</p> <ul style="list-style-type: none"> <li>• This menu option is only visible if the administrator has created a PDF template for the Revenue Line Items module via Admin &gt; PDF Manager.</li> <li>• Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul> <p>Note: To send emails through Sugar, users must first configure a default user email account via Emails &gt; Email Settings.</p>
Generate Quote	Generate a quote based on this revenue line item.
Find Duplicates	Locate potential duplicates of this revenue line item.
Copy	Duplicate this revenue line item to create a new revenue line item.
Historical Summary	View a historical summary of activities (e.g. calls, meetings, etc.) related to this revenue line item.
View Change Log	View a record of changes to this revenue line item.
Delete	Delete this revenue line item.

## Opportunities and Revenue Line Items

In Sugar, the opportunity serves as a header for a set of revenue line items, and the opportunity's amount and probability fields are roll-ups of this revenue line item data. Each revenue line item represents the prospective sale of an individual product. This means that each opportunity must relate to one or more revenue line items, and each revenue line item must relate to an opportunity. When creating an opportunity, you will be required to also create at least one revenue line item in a subpanel beneath the opportunity fields as described in the Creating Simultaneously With Opportunities section of this page. Special consideration also



needs to be given to the importing of opportunities and revenue line items as discussed in the Importing Revenue Line Items section below. Revenue line items and their relationship with opportunities are unique in that they can be deleted from Sugar via the Revenue Line Items subpanel while viewing an opportunity. Instructions for doing so are covered in the Deleting via Opportunities Module section below.

## Creating Simultaneously With Opportunities

When creating an opportunity, a subpanel appears beneath the opportunity fields where you must create one or more revenue line items. The Revenue Line Items subpanel allows the following operations during opportunity creation:

- Scroll horizontally within the subpanel to view all available revenue line item fields.
- Click the Plus button on the far right of the subpanel row to add additional revenue line items to the opportunity. The current Revenue Line Item row will be validated when adding a new row to ensure that all required fields and data are entered properly.
- To remove any revenue line items from the opportunity, simply click the Minus button to the left of the Plus button. Please note that you cannot remove the first revenue line item as at least one related revenue line item is required for the opportunity to save.

The screenshot shows the 'Opportunity Name' field with the value 'Cloud Cover Trust - 137 Units'. Below it are fields for 'Account Name' (Cloud Cover Trust), 'Expected Close Date', 'Likely' (\$0.00), 'Best' (\$0.00), 'Worst' (\$0.00), 'Tags', and 'Status' (In Progress). A 'Show more...' link is visible. The 'REVENUE LINE ITEMS' subpanel is shown below, containing a table with the following data:

Revenue Line Item	Expected Close Date	Likely	Best	Sales Stage
Required	(Required) yyyy	Required		Prospecting

A red box highlights the first row of the table and the Plus button on the right side of the subpanel.

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After saving the opportunity, the revenue line item(s) will appear in the Revenue Line Items subpanel beneath the opportunity record's fields in the record view.

## Deleting via Opportunities Module

If a revenue line item is invalid or should no longer appear in your organization's Sugar instance, it may be deleted as long as its Status field is not set to "Closed Won" or "Closed Lost". For data integrity purposes, closed revenue line items may not be deleted. Deletion may be performed from either the Revenue Line Items detail view or list view, as described in the User Interface documentation. Revenue line items are unique in that they can also be deleted via the Revenue Line Items subpanel on the related opportunity's record view. Please note that deleting revenue line item records will not delete the related records and will only remove the relationship, so you may wish to also delete any related records to avoid orphaned records.

Use the following steps to delete one or more revenue line item records via the Revenue Line Items subpanel on an opportunity record:

1. Navigate to an opportunity in record view.
2. Scroll to the Revenue Line Items subpanel in Data View below the opportunity's fields.
3. Select the desired records then choose "Delete" from the Actions menu.

<input type="checkbox"/>	Revenue Line Item	Expected Close Date	Likely	
<input type="checkbox"/>	Generate Quote	2017-12-04	\$8	
<input checked="" type="checkbox"/>	Delete	2018-12-27	\$4,1	
<input checked="" type="checkbox"/>	★ Cloud Cover Trust	2017-12-19	\$8	

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

## Importing Revenue Line Items

The import function allows you to push multiple revenue line items records into Sugar using a .csv file instead of creating them one-by-one. When an opportunity is imported into Sugar, at least one revenue line item must also be imported and related to the opportunity in order to populate the amounts (e.g. best, likely, etc.) and Expected Close Date field on the opportunity record. When you are importing opportunity and revenue line items, please be sure to import your opportunities

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first, followed by your revenue line items. Each revenue line item row must include its parent opportunity's ID as well as values for its amount fields (i.e. Best, Likely, Worst). For more information on importing, please refer to the Import documentation.

## Products and Revenue Line Items

Sugar's Product Catalog module contains a list of all products or services that your organization sells. This module provides the Revenue Line Items and Quoted Line Items modules with the template used when creating products to be used for Opportunities and Quotes, including pricing and cost information as well as information about the manufacturer. The Product Catalog is maintained by administrators via Admin > Products and Quotes. For more information, please refer to the Products and Quotes documentation in the Administration Guide.

Each revenue line item has the option to relate to an existing product from the product catalog via the Product field. If you choose to select a product from the product catalog, several fields will populate automatically to match the chosen product. Only line items which relate to a product from the catalog will be eligible to be used to generate a quote. For more information on generating quotes from revenue line items, please refer to the Quotes and Revenue Line Items section of this page.

The screenshot shows a Revenue Line Item (RL) form for 'Cloud Cover Trust'. At the top, there is a header bar with a blue circle containing 'RL', the name 'Cloud Cover Trust', a star icon, a 'Following' button, a 'Not Quoted' button, and 'Cancel' and 'Save' buttons. Below the header, the form is organized into two columns. The left column contains: Opportunity Name (Cloud Cover Trust - 137 Units), Sales Stage (Perception Analysis), and Forecast (Exclude). The right column contains: Account Name (Cloud Cover Trust), Probability (%) (50), and Expected Close Date (2017-12-19). At the bottom, there is a 'Product' dropdown menu with a red border around it, showing 'Select Product Catalog...' and a downward arrow. To the right of the dropdown is the 'Product Category' field, which is 'Hail Widgets'.

## Currencies and Revenue Line Items

Sugar allows your organization to perform business around the world by supporting multiple currencies. Administrators must first add desired currencies and exchange rates to Sugar via Admin > Currencies. They also have the ability to set the instance's default currency via Admin > Locale. This is typically the currency of the country where the majority of business is conducted. For more

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information, please refer to the System documentation in the Administration Guide.

Users can specify their own preferred currency in their user profiles. If they choose to also enable the Show Preferred Currency option in their profiles, currency fields throughout Sugar will display in their chosen currency. For more information, please refer to the Getting Started documentation. Finally, each revenue line item record has a Currency field where you will specify the currency being used for this particular business transaction.

## Filtering on Currency Fields

Currency fields are filtered according to the record's set currency rather than being standardized to the user's preferred or system default currency. In the list view, filtering revenue line items by a currency field allows you to specify the filter's currency. Only records matching both the chosen currency and amount range will be returned. For example, if you filter based on a Likely value that equals 500 in US Dollars, then the search result will return all line items with a Likely value of \$500 but will exclude values of €500 or other currency values which are equivalent to \$500.

The screenshot shows a filter interface for revenue line items. The filter is set to 'Likely' with the operator 'is equal to' and the value '500.00'. The currency dropdown is set to '\$ (USD)'. Below the filter, a table of revenue line items is displayed. The 'Likely' column values are '\$500.00' and '\$500.00', which are highlighted with red boxes. The table also shows columns for Revenue Line Item, Sales Stage, Product, Product Category, and a quantity column.

	Revenue Line It...	Sales Stage	Product	Likely	Product Catego...	C	
<input type="checkbox"/>	Chandler Logist...	Prospecting	Corazon Gadget	\$500.00	Barter Widgets	8	<input type="checkbox"/>
<input type="checkbox"/>	Cloud Cover Tr...	Closed Lost	TK 1000 Desktop	\$500.00	Laptops	4	<input type="checkbox"/>

Note: By contrast, when filtering values in the Reports module, any record matching the specified amount or range will be returned regardless of the record's currency. For example, if one revenue line item's Likely value is \$500 in US Dollars and another's is €500 in Euros, filtering a report for a Likely value of exactly 500 will return both records in the report.

## Updating Currency Rates

When saving a revenue line item in a currency that differs from the system-defined default currency, Sugar will store the conversion rate for that currency at the record level. This conversion rate is used to calculate the converted amounts when the field is set to use the system default currency (as opposed to the user's preferred currency which is explained below). To keep amounts historically accurate, the conversion rate will only update on a revenue line item provided the

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sales stage is not set to "Closed Won" or "Closed Lost". If the line item is in any other sales stage, the conversion rate will update under the following scenarios:

- The revenue line item undergoes a save event (e.g. mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved in the opportunity.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all revenue line items saved with that currency to the new rate.

When the viewing user's profile has the Show Preferred Currency option selected, the converted amounts display in the user's preferred currency. In this case, the conversion rate used to calculate the converted amounts is drawn directly from the conversion rate at the system level rather than any conversion rate stored on the record. This means that the value will always use the current conversion rate regardless of the line item's sales stage. For this reason, the converted amount fields should not be considered historically accurate for closed revenue line items when it is using the user's preferred currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the Getting Started documentation.

## Emails and Revenue Line Items

Revenue line items may be related to emails by being selected in the email's Related To field. These relationships allow the revenue line item to display all relevant email correspondence in the Emails subpanel, as described below, and in the History dashlet on a revenue line item's record view.

### Emails Subpanel

The Emails subpanel in the Revenue Line Items module displays emails which are related to the revenue line item record via the email's Related To field. These emails will also appear in the History dashlet on a revenue line item's record view.

The Emails subpanel allows the following functions to be performed:

- **Email Details** : To view the details of an email, click the subject to open it in detail view.
- **Record Count** : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g.

"6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.

- Collapse or Expand : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
  - Note: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.
- Column Widths : Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- Column Sort : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).
- Compose a New Email : Click the Plus button on the upper right of a subpanel to create a new email with, by default, a relationship to the revenue line item you are currently viewing. The email will automatically select the revenue line item in the Related To field.
  - Note: Because creating a new related record opens a drawer on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- More Records : By default, Sugar displays up to five records in each subpanel, though administrators can alter the number via Admin > System Settings as described in the System documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g. "More emails...") at the bottom of the subpanel to load the next set of records.

Related ▾ All Filter All Records Search...

Em **EMAILS (5 of 6+)** +

	From	Subject	Status	Date	
☆	Sally Bronsen	<a href="#">Demo</a>	Archived	2017-07-14 05:45am	👁️ ▾
☆	Administrator	<a href="#">Discuss pricing</a>	Draft	2017-12-29 02:05pm	👁️ ▾
☆	Sally Bronsen	<a href="#">Introduce all players</a>	Archived	2017-10-12 08:00am	👁️ ▾
☆	Administrator	<a href="#">Demo</a>	Draft	2017-12-29 02:05pm	👁️ ▾
☆	Will Westin	<a href="#">Demo</a>	Archived	2017-03-07 01:00pm	👁️ ▾

[More emails...](#)

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## Quotes and Revenue Line Items

Quotes and opportunities both track sales throughout their lifecycle, but the two modules serve different purposes. Quotes allow you to communicate the details of a sale with customers while opportunities, with their revenue line item, allow you to forecast potential sales and the possible ranges of their dollar amounts. To aid in using both modules, Sugar allows you to generate a quote from a set of revenue line items as well as to use a quote to generate an opportunity and its set of revenue line items.

### Generating Quotes From Revenue Line Items

Users may use one or more revenue line items to generate a new quote. Doing so copies all relevant information from the revenue line item(s) to the new quote's fields. Only revenue line items which include a product from the Product Catalog in their Product field may be used to generate a quote. The generated quote will be automatically linked to the revenue line item and displayed in its Associated Quote field.

After being used in a quote generation, the revenue line item will show a "Quoted" badge at the top of its record view.



Revenue line items which have not been included on a quote display a "Not Quoted" badge instead.



Please note that each revenue line item may be used to generate a quote only once. The option will no longer be available from a revenue line item's record view once it has been included on a quote. The effect is that each revenue line item may be a part of only one quote.

### Generating a Quote via Subpanel

Users may also generate a quote from one or more revenue line items on an opportunity record.

Use the following steps to generate a quote via the Revenue Line Items subpanel on an opportunity record:

1. Navigate to an opportunity in record view.
2. Scroll to the Revenue Line Items subpanel in Data View below the opportunity's fields.
3. Select the checkboxes of the revenue line items you would like to include in the quote.
  - Note: Only revenue line items which have not been included in previous quotes may be used to generate a new quote.
4. Choose "Generate Quote" from the Actions menu.

<input type="checkbox"/>	Revenue Line Item	Expected Close Date	Likely	Best	
<input type="checkbox"/>	Generate Quote	2018-08-18		\$633.00	
<input type="checkbox"/>	Delete	2018-05-30		\$3,201.00	
<input checked="" type="checkbox"/>	Super Star Holdings...	2017-12-05		\$871.00	
<input checked="" type="checkbox"/>	Super Star Holdings...	2017-10-05		\$2,430.00	

5. The quote record that opens in edit view will have all relevant fields and line items automatically populated from the revenue line item records. Make any necessary modifications, then click "Save" to preserve your changes.

## Generating a Quote via Record View

Users may also generate a quote from a single revenue line item record from the Revenue Line Item record view.

Use the following steps to generate a quote via the Revenue Line Item's record view:

1. Navigate to an unquoted revenue line item's record view.
2. Select "Generate Quote" from the Actions menu.

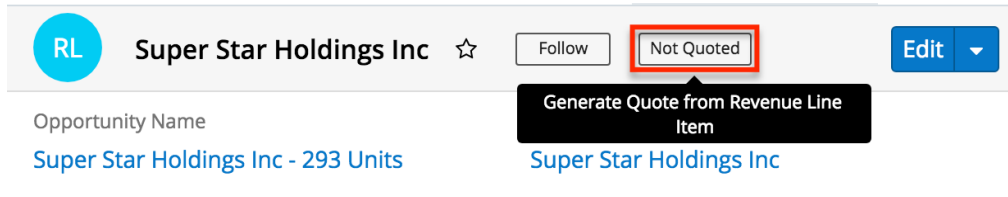
RL Super Star Holdings Inc ☆ Follow Not Quoted Edit

Opportunity Name	Account Name	Share
Super Star Holdings Inc - 293 Units	Super Star Holdings Inc	Generate Quote
Sales Stage	Probability (%)	Find Duplicates
Negotiation/Review	80	

Alternatively, click the "Not Quoted" badge to initiate the same quote-creation process.



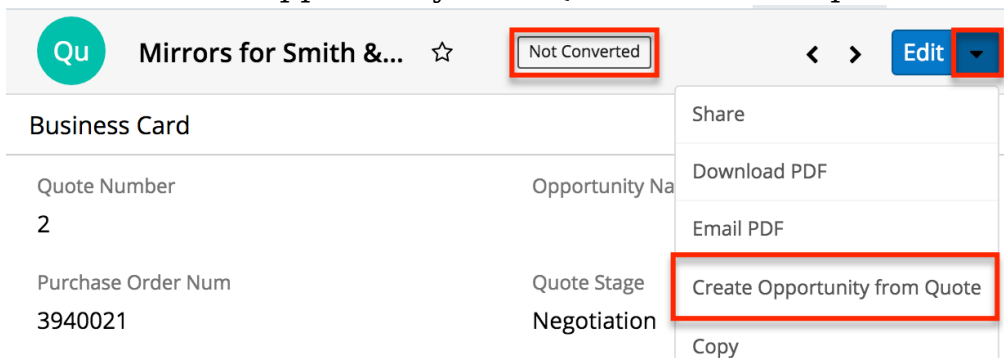




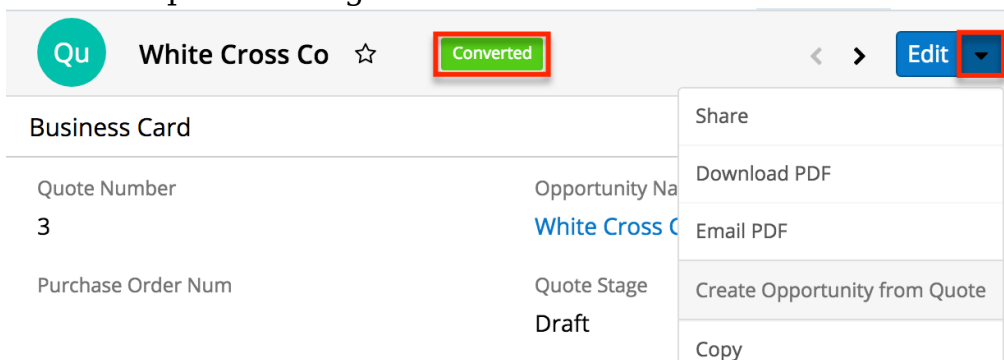
- The quote record that opens in edit view will have all relevant fields and line items automatically populated from the revenue line item record. Make any necessary modifications, then click "Save" to preserve your changes.

## Generating Revenue Line Items From Quotes

To generate an opportunity including its set of revenue line items from a quote, choose "Create Opportunity from Quote" from the quote record's Actions menu.



Note: Quotes that are already "Converted" (as indicated by the badge adjacent to the quote's name in the example pictured here) cannot be re-converted into an opportunity. The "Create Opportunity from Quote" menu option will be grayed out when the quote's badge is Converted.



After selecting the Create Opportunity... option, you will be navigated to the newly created and saved opportunity, which will be pre-populated with the original quote's values in the Name, Account Name, Expected Close Date, Best, Likely, and Worst fields. In addition, the opportunity's Type will default to "New Business" and the Status to "In Progress".



Op

**Mirrors for Smith & Sons** ☆ Follow

Edit

<p>Account Name <b>Smith &amp; Sons</b></p> <p>Likely \$520.00</p> <p>Best \$520.00</p> <p>Tags</p>	<p>Expected Close Date 2012-04-30</p> <p>Worst \$520.00</p> <p>Status In Progress</p>
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Show more...

Related ▾

All

Filter

All Records

Search...

↺

📅

🕒

RL

**REVENUE LINE ITEMS (1)**

+

▾

		Revenue Line Item	Expected Close Date	Likely	Best	
<input type="checkbox"/>	☆	Reflective Mirror Wi...	2012-04-30		\$520.00	👁️ ▾

Qu

**QUOTES (1)**

+

▾

	Subject	Account Name	Converted Amount	Valid Unti	
☆	Mirrors for Smith & ...	Smith & Sons	\$562.90	2012-04-	✎ ▾

The quoted line items related to the original quote will be copied to new revenue line items related the new opportunity. By default, the Sales Stage values for these revenue line items are set to "Proposal/Price Quote", the Probability to "65%", and the Type to "New Business".

Because the probability defaults to 65%, the revenue line item will, by default, have a Forecast field value of "Exclude," meaning it will not be included in forecasts. You can edit the revenue line items and the opportunity record to modify any of these values as needed. The originating quote will be related to the new opportunity and can be found in the Quotes subpanel on the opportunity's record view. For more information on creating an opportunity from a quote, please refer to the Creating Opportunities from Quotes section of the Quotes documentation.

Last Modified: 2018-01-03 18:47:39

## Opportunities

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## Overview

Sugar's Opportunities module allows you to track individual sales and their line items from start to finish. Each opportunity record serves as a header for a group of revenue line items as well as relating to other important records such as quotes, contacts, etc. Each revenue line item is the prospective sale of a particular product and includes relevant sale data. Each revenue line item will typically progress through several Sales Stages until it is marked either "Closed Won" or "Closed Lost". The Opportunity record reflects the amount and expected close date of its revenue line items. Opportunities and revenue line items can be leveraged even further by using Sugar's Forecasting module to understand and predict sales trends as well as focus work to achieve sales quotas. For more information on the Forecasts module, please refer to the Forecasts documentation.

Note: If your instance is configured to use opportunities alone without revenue line items, please refer to the Opportunities documentation in the Professional Edition Application Guide. For more information about changing your opportunities model via Admin > Opportunities, please see the Opportunities Configuration documentation in the Administration Guide.

You can view opportunity information in opportunity-based dashlets such as "My Closed Opportunities". Clicking an opportunity's name or bubble from any dashlet will open the Opportunities record view while hovering on the bubble will display key details in a tooltip. For more information on using dashlets and viewing opportunity records via dashlets, please refer to the Dashboards and Dashlets documentation.

This documentation will cover information and actions specific to the Opportunities module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting calls, please refer to the Working With Opportunities section of this page.

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

## Opportunity Fields

The Opportunities module contains a number of stock fields which come out-of-the-box with Sugar. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role access have the ability to

alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration Guide.

Field	Description
Account Name	The account to which the opportunity belongs
Assigned to	The Sugar user assigned to the opportunity
Best	<p>Calculated as the total of Best values of all related revenue line items, the opportunity's most optimistic total amount</p> <p>The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Opportunities section of this page.</p> <p>Note: The Best value for related revenue line items in a sales stage of "Closed Lost" will not be included in the calculation.</p>
Campaign	<p>The campaign, if any, from which the opportunity originated</p> <p>Note: This is an optional field as not all opportunities will have a campaign.</p>
Date Created	The date the opportunity record was created
Date Modified	The date the opportunity record was last modified
Description	A description or other information about the opportunity
Expected Close Date	Calculated as the last expected close

	date of a related revenue line item, the opportunity's expected or actual close date
Lead Source	The source (e.g. Trade Show) from which the opportunity originated
Likely	<p>Calculated as the total of Likely values of all related revenue line items, the opportunity's most probable total amount</p> <p>The amount will display in the system default currency or, if your Show Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Opportunities section of this page.</p> <p>Note: The Likely value for related revenue line items in a sales stage of "Closed Lost" will not be included in the calculation.</p>
Next Step	The succeeding stage of the opportunity's sales cycle
Opportunity Name	The name of the opportunity
Status	Calculated based on the sales stages of the related revenue line items, the current status of the opportunity
Teams	The Sugar team(s) assigned to the opportunity record
Type	The type (e.g. new business, existing business) of opportunity
Worst	<p>Calculated as the total of Worst values of all related revenue line items, the opportunity's least optimistic total amount</p> <p>The amount will display in the system default currency or, if your Show</p>

	<p>Preferred Currency option is enabled on your user profile, in your preferred currency. If the record's selected currency differs, you will also see a grey box with the value displayed using the record's selected currency. For more information, please refer to the Currencies and Opportunities section of this page.</p> <p>Note: The Worst value for related revenue line items in a sales stage of "Closed Lost" will not be included in the calculation.</p>
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## Working With Opportunities

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 Opportunities section describe Opportunities-specific behaviors and functionality.

Content Link	Description
Creating Opportunities Basic Opportunity Creation Creating via Quick Create Creating via Subpanels Creating via Duplication Importing Opportunities	The Creating Records section covers the various methods of creating new opportunity records, including via the Create button in the Opportunities module, the Quick Create menu on the upper right of every Sugar page, via the Opportunities subpanel on related module records, duplication of an existing opportunity record, and importing a list of opportunities into Sugar using a .csv spreadsheet.
Viewing Opportunities 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 opportunity records, including via the Opportunities list view and record view, the Recently Viewed menu in the Opportunities module tab, list view dashlets showing opportunity information, activity stream entries concerning opportunity updates or where a user mentions an opportunity,



	<p>previewing opportunities in the right hand side panel, and reports displaying opportunity data.</p>
<p>Searching for Opportunities Global Search List View Search Creating a Filter Saving a Filter</p>	<p>The Searching for Records section provides an introduction to the two searching methods for locating opportunities: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Opportunities module.</p>
<p>Opportunities List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview Record Actions Menu More Opportunities Activity Stream Dashboards</p>	<p>The List View section walks through the many elements of the Opportunities List View layout which contains a filterable list of all opportunity records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Opportunities list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.</p>
<p>Opportunities Record View Favorite Designation Following Designation Next or Previous Record Actions Menu Show More Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Activity Stream Dashboards</p>	<p>The Record View section walks through the many elements of the Opportunities Record View layout which contains detailed information about a single opportunity record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Opportunities record view are described in the Record View Actions Menu section of this page.</p>
<p>Editing Opportunities Editing Inline via Record View Editing via Record View Editing Inline via Subpanels Editing Inline via List View Mass Editing via List View</p>	<p>The Editing Records section describes the various methods of editing existing opportunity records, including inline via the Opportunities record view, in full edit mode on the record view, inline via the Opportunities subpanel on related</p>

Editing Fields	module records, inline via the Opportunities list view, and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.
Deleting Opportunities Deleting via Record View Deleting via List View Mass Deleting via List View	<p>The Deleting Records section describes the various methods of deleting unwanted opportunities, including via the opportunities record view, an individual record's Actions menu on the Opportunities list view, and the Mass Actions menu on the list view.</p> <p>Note: For data integrity purposes, an opportunity related to a revenue line item with a "Closed Won" or "Closed Lost" status may not be deleted. In addition, revenue line items in these statuses may not be deleted.</p>
Exporting Opportunities	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of opportunities and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).
Recalculating Calculated Values	The Recalculating Calculated Values section provides instructions on utilizing the Recalculate Values list view option to update calculated field values in the module if the administrator has changed the field's formula via Admin > Studio.
Finding Duplicate Opportunities	The Finding Duplicate Records section provides instructions for locating duplicate opportunity records. If searching on matching fields (e.g. Opportunity Name) identifies one or more duplicates, they can be merged into a single record.
Merging Opportunities Merging via List View	The Merging Records section provides instructions for merging duplicate opportunities which will combine field

	values and related records into a single opportunity.
Viewing Opportunity Historical Summaries	The Viewing Record Historical Summaries section describes the Historical Summary record view option which displays quick details of the opportunity record's related calls, meetings, emails, notes, and tasks.
Viewing Opportunity Change Logs	The Viewing Record Change Logs section describes the View Change Log record view option which displays a history of changes to the opportunity's audited fields.
Opportunity PDFs Downloading Opportunity PDFs Emailing Opportunity PDFs	The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of opportunity information as configured by an administrator via Admin > PDF Manager.
Favoriting Opportunities Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking opportunities as favorites, including via the Opportunities list view, Opportunities record view, or any Opportunities subpanel appearing on the record view of a related module. Favoriting an opportunity allows you to easily access it from list views, dashlets, or the Opportunities module tab.
Following Opportunities Following via List View Following via Record View	The Following Records section describes the various methods of marking opportunities as "Following", including via the Opportunities list view and record view. Following an opportunity causes its activity stream updates to be included on your Home page and Opportunities list view activity streams so that you can easily keep up with changes and user posts on the record.
Sharing Opportunities	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the opportunity record. If the

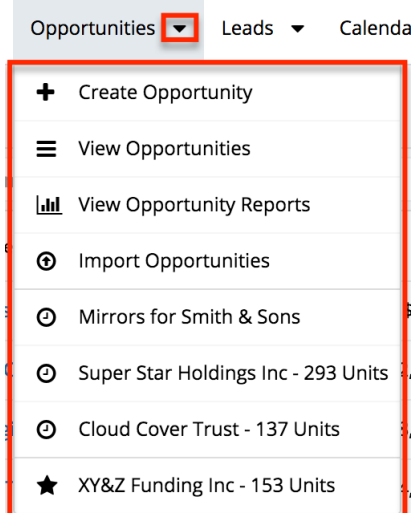
recipient is logged into Sugar, clicking the link will bring them directly to the opportunity's record view.

## Opportunity Menu

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

### Module Tab Menus

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



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

Menu Item	Description
Create Opportunity	Opens the record view layout to create a new opportunity
View Opportunities	Opens the list view layout to search and display opportunities

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View Opportunity Reports	Displays existing reports based on the Opportunities module
Import Opportunities	Opens the import wizard to create or update opportunities using external data

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

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

## List View Menus

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

## List View Mass Actions Menu

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



<input type="checkbox"/>	Name	Account Name	Status	Likely
<input type="checkbox"/>	Mass Update	Smith & Sons	In Progress	\$520.00
<input type="checkbox"/>	Recalculate Values	White Cross Co	In Progress	\$12,630.00
<input type="checkbox"/>	Merge	Chandler Logis...	In Progress	\$8,535.00
<input type="checkbox"/>	Delete	Cloud Cover Tr...	In Progress	\$4,996.00
<input type="checkbox"/>	Export	Super Star Hol...	In Progress	\$4,599.00

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

Menu Item	Description
Mass Update	Mass update two or more opportunities at a time
Merge	Merge two or more duplicate opportunities
Delete	Delete one or more opportunities at a time
Export	Export one or more opportunities to a CSV file
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 opportunity directly from the list view.

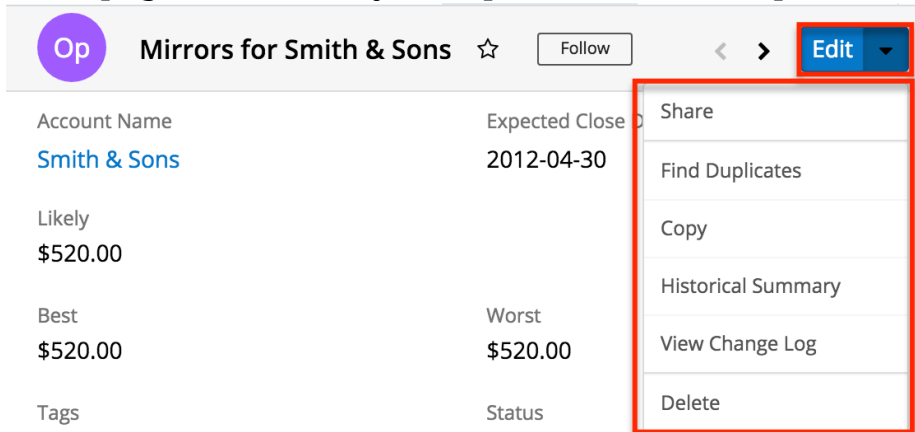
<input type="checkbox"/>	☆	Mirrors for Smi...	Smith & Sons	In Progress	\$520.00	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	☆	White Cross Co...	White Cross Co	In Progress			
<input type="checkbox"/>	☆	Chandler Logis...	Chandler Logis...	In Progress			
<input type="checkbox"/>	☆	Cloud Cover Tr...	Cloud Cover Tr...	In Progress			
<input type="checkbox"/>	☆	Super Star Hol...	Super Star Hol...	In Progress	\$4,599.00	<input type="checkbox"/>	<input type="checkbox"/>

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

Menu Item	Description
Preview (Eye icon)	Preview this opportunity in the intelligence pane
Edit	Edit this opportunity
Follow	Follow this opportunity
Delete	Delete this opportunity

## Record View Actions Menu

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



The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this opportunity.
Share	Share a link to this opportunity via email.  Note: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Download PDF	Download the opportunity information as a PDF file.  <ul style="list-style-type: none"> <li>This menu option is only visible if</li> </ul>



	<p>the administrator has created a PDF template for the Opportunities module via Admin &gt; PDF Manager</p> <ul style="list-style-type: none"> <li>• Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul>
Email PDF	<p>Email the opportunity information as a PDF attachment.</p> <ul style="list-style-type: none"> <li>• This menu option is only visible if the administrator has created a PDF template for the Opportunities module via Admin &gt; PDF Manager</li> <li>• Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul> <p>Note: To send emails through Sugar, users must first configure a default user email account via Emails &gt; Email Settings.</p>
Find Duplicates	Locate potential duplicates of this opportunity
Copy	Duplicate this opportunity
Historical Summary	View a historical summary of activities (e.g. calls, meetings, etc.) related to this opportunity
View Change Log	View a record of changes to this opportunity
Delete	Delete this opportunity

## Revenue Line Items and Opportunities

When creating a new opportunity, you will be required to also create at least one revenue line item. This is because the opportunity serves as a header for a set of revenue line items, and the opportunity's amount and probability fields are roll-ups of this revenue line item data. For more information about revenue line items, please refer to the Revenue Line Items documentation.

Please note that the related revenue line item(s) in the subpanel determine the

value for certain Opportunity fields (e.g. Status, Expected Close Date, Likely, etc.). The opportunity's Status field will be "New" until a revenue line item is added. It will then remain "In Progress" until all of the related revenue line items are closed. If all related revenue line items are "Closed Won", then the parent opportunity will also be marked "Closed Won". If all related revenue line items are "Closed Lost", then the opportunity will also be marked "Closed Lost". The opportunity's Expected Close Date field will automatically reflect the latest close date of all of its related revenue line items. Throughout the opportunity's life cycle, the opportunity's amount fields (Likely, Best, Worst) will be automatically populated as the total of the corresponding fields on its related revenue line items.

## Creating Revenue Line Items and Opportunities Simultaneously

When creating an opportunity, a subpanel appears beneath the opportunity fields where you must create one or more revenue line items.

The screenshot shows the Opportunity creation interface. At the top, there's a purple circle icon with 'Op' and a text input field for 'Opportunity Name' containing 'Cloud Cover Trust - 137 Units'. To the right are 'Cancel' and 'Save' buttons. Below this are several input fields: 'Account Name' (Cloud Cover Trust), 'Expected Close Date', 'Likely' (\$0.00), 'Best' (\$0.00), 'Worst' (\$0.00), 'Tags', and 'Status' (In Progress). A 'Show more...' link is visible. Below the main form is a subpanel titled 'REVENUE LINE ITEMS' with a blue circle icon and 'RL'. It contains a table with columns: Revenue Line Item, Expected Close Date, Likely, Best, and Sales Stage. The first row has 'Required' in the first column, '(Required) yyyy' with a calendar icon in the second, 'Required' in the third, an empty field in the fourth, and 'Prospecting' in the fifth. To the right of the table are minus and plus buttons. The plus button is highlighted with a red box.

Revenue Line Item	Expected Close Date	Likely	Best	Sales Stage
Required	(Required) yyyy 📅	Required		Prospecting

The Revenue Line Items subpanel allows the following operations during opportunity creation:

- Scroll horizontally within the subpanel to view all available revenue line item fields.
- To add additional line items to the opportunity, click the Plus button to the right of the row. The current Revenue Line Item row will be validated when adding a new row to ensure that all required fields and data are entered properly.
- To remove any revenue line items from the opportunity, simply click the Minus button to the right of the row. Please note that you cannot remove the

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first revenue line item as at least one related revenue line item is required for the opportunity to save.

After the opportunity is saved, the revenue line item(s) will appear in the Revenue Line Items subpanel in the opportunity's record view.

## Revenue Line Items Subpanel

The Revenue Line Items subpanel contains all line items which make up this opportunity. Every opportunity must have one or more related revenue line items, and each revenue line item must belong to an opportunity. Because of this, there is no "Unlink" option in the Record Actions Menu to the right of each row. A quote can be generated from one or more of an opportunity's revenue line items from this subpanel. For more information, please refer to the Generating Quotes From Revenue Line Items section of this documentation.

## Importing Opportunities

The import function allows you to push multiple revenue line items records into Sugar using a .csv file instead of creating them one-by-one. When an opportunity is imported into Sugar, at least one revenue line item must also be imported and related to the opportunity in order to populate the amounts (e.g. best, likely, etc.) and Expected Close Date field on the opportunity record. When you are importing opportunity and revenue line items, please be sure to import your opportunities first, followed by your revenue line items. Each revenue line item row must include its parent opportunity's ID as well as values for its amount fields (i.e. Best, Likely, Worst). For more information on importing, please refer to the Import documentation.

## Quotes and Opportunities

Quotes and opportunities both track sales throughout their lifecycle, but the two modules serve different purposes. Quotes allow you to communicate the details of a sale with customers while opportunities allow you to forecast potential sales and the possible ranges of their dollar amounts. To aid in using both modules, Sugar allows you to generate an opportunity from a quote as well as to generate a quote from a set of revenue line items.

## Generating Opportunities From Quotes

To generate an opportunity including its set of revenue line items from a quote,

choose "Create Opportunity from Quote" from the quote record's Actions menu.

The screenshot shows a quote record for "Mirrors for Smith &...". The quote is marked as "Not Converted" with a badge. The "Create Opportunity from Quote" option is highlighted in the actions menu.

Quote Number	Opportunity Name
2	

Purchase Order Num	Quote Stage
3940021	Negotiation

- Share
- Download PDF
- Email PDF
- Create Opportunity from Quote
- Copy

Note: Quotes that are already "Converted" (as indicated by the badge adjacent to the quote's name in the example pictured here) cannot be re-converted into an opportunity. The "Create Opportunity from Quote" menu option will be grayed out when the quote's badge is Converted.

The screenshot shows a quote record for "White Cross Co". The quote is marked as "Converted" with a badge. The "Create Opportunity from Quote" option is highlighted in the actions menu.

Quote Number	Opportunity Name
3	White Cross Co

Purchase Order Num	Quote Stage
	Draft

- Share
- Download PDF
- Email PDF
- Create Opportunity from Quote
- Copy

After selecting the Create Opportunity... option, you will be navigated to the newly created and saved opportunity, which will be pre-populated with the original quote's values in the Name, Account Name, Expected Close Date, Best, Likely, and Worst fields. In addition, the opportunity's Type will default to "New Business" and the Status to "In Progress".



Op

**Mirrors for Smith & Sons** ☆ Follow

Edit ▼

<p>Account Name <b>Smith &amp; Sons</b></p> <p>Likely <b>\$520.00</b></p> <p>Best <b>\$520.00</b></p> <p>Tags</p>	<p>Expected Close Date <b>2012-04-30</b></p> <p>Worst <b>\$520.00</b></p> <p>Status <b>In Progress</b></p>
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[Show more...](#)

Related ▼

All

Filter

All Records

Search...

↺

📊

⌛

RL

**REVENUE LINE ITEMS (1)**

+

▼

		Revenue Line Item	Expected Close Date	Likely	Best	
<input type="checkbox"/>	☆	Reflective Mirror Wi...	2012-04-30	\$520.00		👁️ ▼

Qu

**QUOTES (1)**

+

▼

	Subject	Account Name	Converted Amount	Valid Unti	
☆	Mirrors for Smith & ...	Smith & Sons	\$562.90	2012-04-	✎ ▼

The quoted line items related to the original quote will be copied to the new opportunity as revenue line items. By default, the Sales Stage values for the revenue line items are set to "Proposal/Price Quote", the Probability to "65%", and the Type to "New Business".

Because the probability defaults to 65%, the revenue line items will, by default, have a Forecast field value of "Exclude," meaning they will not be included in forecasts. You can edit the revenue line items and the opportunity record to modify any of these values as needed. The originating quote will be related to the new opportunity and can be found in the Quotes subpanel on the opportunity's record view.

For more information on creating an opportunity from a quote, please refer to the

### Generating Quotes From Revenue Line Items

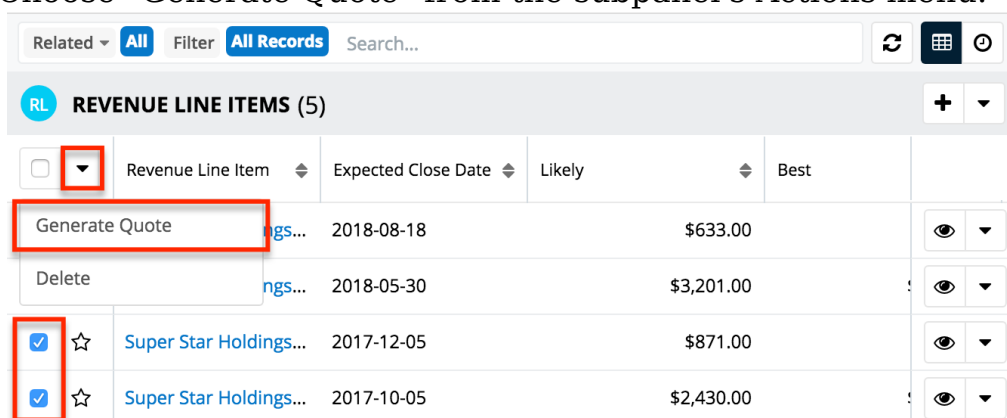
A quote may be generated from one or more of an opportunity's revenue line items

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via the Opportunities record view's Revenue Line Items subpanel. Each individual revenue line item may be used to generate a quote only once. The option will no longer be available from a revenue line item's record view once it has been included on a quote.

Use the following steps to generate a quote from an opportunity's Revenue Line Items subpanel:

1. Navigate to the Revenue Line Item subpanel on an opportunity's record view.
2. Select the revenue line items you wish to include on a quote.
3. Choose "Generate Quote" from the subpanel's Actions menu.



4. The new quote is opened in record view to allow additional changes. Make any necessary changes to the quote's fields then click "Save" to finalize the new quote record.

The quote record is automatically generated with a quoted line item record for each revenue line item record. For more information, please refer to the Quotes and Quoted Line Items documentation.

## Emails and Opportunities

Opportunities may be related to emails by being selected in the email's Related To field. These relationships allow the opportunity to display all relevant email correspondence in the Emails subpanel and History dashlet on an opportunity's record view. An opportunity's Emails subpanel and History dashlet may also display emails belonging to the contacts related to the opportunity.

### Emails Subpanel

The Emails subpanel in the Opportunities module displays emails which are associated with the opportunity record in a variety of ways:

- 
- Related to the opportunity : If the opportunity is selected in the email's Related To field, the email and opportunity are explicitly related, and the email will appear in the opportunity's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the Emails documentation.
  - Related to the opportunity's related contacts : If the email is related, either explicitly or implicitly, to a contact record which is related to the opportunity, the email will appear in the opportunity's Emails subpanel and History dashlet.
    - Note: Administrators can enable or disable an opportunity from displaying related contact's emails via Admin > Related Contacts Emails. For more information, please refer to the Email documentation in the Administration Guide.

The Emails subpanel allows the following functions to be performed:

- Email Details : To view the details of an email, click the subject to open it in detail view.
- Record Count : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- Collapse or Expand : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
  - Note: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.
- Column Widths : Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- Column Sort : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).
- Compose a New Email : Click the Plus button on the upper right of a subpanel to create a new email with, by default, a relationship to the opportunity you are currently viewing. The email will automatically select the opportunity in the Related To field.
  - Note: To send email from Sugar, users must configure their outbound email server via Emails > Email Settings or, if using the system email account to send email, the system's outbound email server must be



configured by an administrator in Admin > System Email Settings.

- Note: Because creating a new related record opens a drawer on top of the current record view, you should use the Cancel button to return to record view. Using the browser's back button will return you to the previous page.
- More Records : By default, Sugar displays up to five records in each subpanel, though administrators can alter the number via Admin > System Settings as described in the System documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g. "More emails...") at the bottom of the subpanel to load the next set of records.

	From	Subject	Status	Date	
☆	Sally Bronsen	Demo	Archived	2017-07-14 05:45am	👁️ ▼
☆	Administrator	Discuss pricing	Draft	2017-12-29 02:05pm	👁️ ▼
☆	Sally Bronsen	Introduce all players	Archived	2017-10-12 08:00am	👁️ ▼
☆	Administrator	Demo	Draft	2017-12-29 02:05pm	👁️ ▼
☆	Will Westin	Demo	Archived	2017-03-07 01:00pm	👁️ ▼

## Leads and Opportunities

Once a lead has been evaluated and qualified, it can be converted into an opportunity in addition to a contact and account. Depending on how your administrator has configured the Lead Conversion layout, it may be possible or even required to create an opportunity or relate to an existing opportunity during lead conversion. For more information on opportunities and lead conversion, please refer to the Leads documentation.

3 New Opportunity (optional): Search Create Opportunity

Op Opportunity Name  
X-Sell Holdings - 200 Units

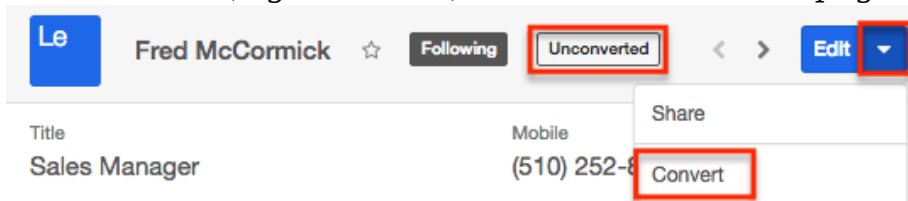
## Creating via Lead Conversion

Sugar enables you to create a new opportunity record during the lead conversion process. For more information about lead conversion, please refer to the Leads

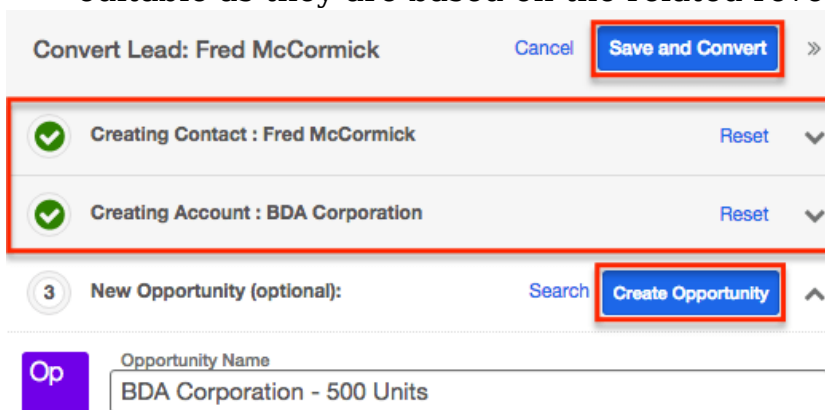
documentation.

Use the following steps to create an opportunity during lead conversion:

1. Navigate to a Leads record view.
2. Select "Convert" from the Actions menu or click the Unconverted button to initiate the lead conversion process.
  - Note: Sugar will automatically perform a duplicate check for the modules (e.g. Contacts) on the Convert Lead page.



3. If there are no duplicate records found for the required modules (Contacts, Accounts) in lead conversion, the new records will be automatically marked for creation on the Convert Lead page and associated to the lead. The panel will be collapsed as well, but you can click the header to open the panel and view the record's details.
  - Note: If there are duplicate records detected for a module, you can either select an existing record or create a new record. For more information, please refer to the Leads documentation.
4. Once the Contact and Account panels are completed, you can proceed to the Opportunity panel to create an opportunity record.
5. Enter the relevant information on the displayed record view then click "Create Opportunity". Please note that some opportunity fields will not be editable as they are based on the revenue line item you entered.
  - Note: Some opportunity fields (e.g. Expected Close Date, etc.) will not be editable as they are based on the related revenue line item(s).



6. Once all the appropriate panels are complete, click "Save and Convert" to convert the lead.

Once the lead has been converted successfully, the lead's record view will display the Converted badge in the header and show the converted contact, account, and

opportunity below the record's detail. You can click the Preview icon to the far right of each record's row to view the details of the converted opportunity and other records.

The screenshot shows a user profile for Fred McCormick. At the top, there is a header with the user's initials 'Le', name 'Fred McCormick', a star icon, a 'Following' button, a 'Converted' button (highlighted with a red box), and navigation arrows. Below the header, the profile details are displayed in a grid:

Title	Sales Manager	Mobile	(510) 252-8800
Website		Do Not Call	<input type="checkbox"/>
Account Name	BDA Corporation	Email	fred@example.com
Tags			

Below the details is a 'Show more...' link. At the bottom, a red-bordered box highlights a list of related records:

- Contact: Fred McCormick (with a preview icon)
- Account: BDA Corporation (with a preview icon)
- Opportunity: BDA Corporation - 500 Units (with a preview icon)

## Forecasts and Opportunities

Sugar's Forecasts module incorporates opportunity records to build forecasting worksheets and predict sales. Forecasts are based on the monetary value of the revenue line items in Sugar. Users can work towards sales quotas at the individual, team, and sales organization level. Before users can access the Forecasts module to begin building forecasting worksheets, a user with administrator access must configure the Forecasts module with the organization's desired Time Periods, Ranges, and Scenarios. For more information on setting up the Forecasts module, please refer to the Forecast Configuration documentation in the Administration Guide.

Based on the chosen filters (include, exclude, etc.), you will see all or some of your assigned revenue line items for the currently selected time period. The Forecast column displays an automatic category indicating whether or not the revenue line item's amounts are included in the totals for the specified time period. You can work directly with your revenue line item records by inline editing their probabilities and amounts from the Forecasts module or by clicking the Name field to open a record in record view where you can make additional edits. You can also view {{an opportunity}}'s details directly from the forecast worksheet by clicking the Preview icon to the far right of each row. For more information on editing and managing forecasts, please refer to the Forecasts documentation.

Max Jensen		Save Draft	Commit	>>	
In Forecast			Likely	Best	
Time Period					
Q3 2013			↑ \$50,000.00	↑ \$52,000.00	
Last Commit: 21 hours ago at 12:09			\$2,308.22	\$3,280.44	
Filter Include					
Forecast	Opportunity Name	Account Name	Expected Close Date	Stage	...
Include	Q.R.&E. Corp - 7...	Q.R.&E. Corp	07/04/2013	Closed Won	👁
Include	RR. Talker Co - 5...	RR. Talker Co	09/22/2013	Negotiation/Review	👁
Include	Max Holdings Lt...	Max Holdin...	08/11/2013	Closed Won	👁

## Contacts and Opportunities

Each opportunity can relate to one or more contacts which are displayed in a subpanel on the Opportunities record view. The Contacts subpanel allows users to select an opportunity-specific role (e.g. Primary Decision Maker, Business Evaluator, etc.) for each related contact to help you classify how each individual will ultimately factor into the buying decision for the current opportunity.

To select a role, simply choose "Edit" from the Actions menu on the far right of the record's row in the Contacts subpanel. The record's row will open up within the subpanel allowing you to edit the individual fields. Select the appropriate role for the contact then click "Save".

CONTACTS (2)						+	▼
Name	Account Name	Role	Email				
Cancel Select... ▼ Darell Erlandson	Underwater Mining... ✕ ▼	Technical Decision ... ✕ ▼	sales.hr.qa@e				Save
☆ Melvin Bank	Powder Suppliers	Primary Decision Maker	sales51@exan				👁 ▼

The selected role will be displayed adjacent to the contact the contact for only the current opportunity.

## Currencies and Opportunities

Sugar allows your organization to perform business around the world by supporting multiple currencies. Administrators must first add desired currencies and exchange rates to Sugar via Admin > Currencies. They also have the ability to

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set the instance's default currency via Admin > Locale. This is typically the currency of the country where the majority of business is conducted. For more information, please refer to the System documentation in the Administration Guide.

Users can specify their own preferred currency in their user profiles. If they choose to also enable the Show Preferred Currency option in their profiles, currency fields throughout Sugar will display in their chosen currency. For more information, please refer to the Getting Started documentation. Finally, each opportunity record has a Currency field where you will specify the currency being used for this particular business transaction.

## Filtering on Currency Fields

Currency fields are filtered according to the record's set currency rather than being standardized to the user's preferred or system default currency. In the list view, filtering opportunities by a currency field allows you to specify the filter's currency. Only records matching both the chosen currency and amount range will be returned. For example, if you filter based on a Likely value that equals 500 in US Dollars, then the search result will return all opportunities with a Likely value of \$500 but will exclude values of €500 or other currency values which are equivalent to \$500.

The screenshot shows a filter interface with a dropdown menu set to 'Likely', an operator 'is equal to', and a value '\$ (USD) 500.00'. Below the filter is a table of records with columns for 'Revenue Line It...', 'Sales Stage', 'Product', 'Likely', and 'Product Catego...'. The 'Likely' column contains values '\$500.00' for two records, which are highlighted with a red box.

Revenue Line It...	Sales Stage	Product	Likely	Product Catego...
Chandler Logist...	Prospecting	Corazon Gadget	\$500.00	Barter Widgets
Cloud Cover Tr...	Closed Lost	TK 1000 Desktop	\$500.00	Laptops

Note: By contrast, when filtering values in the Reports module, any record matching the specified amount or range will be returned regardless of the record's currency. For example, if one revenue line item's Likely value is \$500 in US Dollars and another's is €500 in Euros, filtering a report for a Likely value of exactly 500 will return both records in the report.

## Updating Currency Rates

When saving an opportunity in a currency that differs from the system-defined default currency, Sugar will store the conversion rate for that currency at the record level. This conversion rate is used to calculate the converted Likely, Best,

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and Worst amounts when the field is set to use the system default currency (as opposed to the user's preferred currency which is explained below). To keep amounts historically accurate, the conversion rate will only update on an opportunity provided the sales stage is not set to "Closed Won" or "Closed Lost". If the opportunity is in any other sales stage, the conversion rate will update under the following scenarios:

- The opportunity undergoes a save event (e.g. mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved in the opportunity.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all opportunities saved with that currency to the new rate.

When the viewing user's profile has the Show Preferred Currency option selected, the converted Likely, Best, and Worst amounts display in the user's preferred currency. In this case, the conversion rate used to calculate the converted amounts is drawn directly from the conversion rate at the system level rather than any conversion rate stored on the record. This means that the value will always use the current conversion rate regardless of the opportunity's sales stage. For this reason, the converted amount fields should not be considered historically accurate for closed opportunities when it is using the user's preferred currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the Getting Started documentation.

For more information about currency exchange rates, please refer to the System documentation in the Administration Guide.

Last Modified: 2018-01-03 18:50:25

## Forecasts

### Overview

Sugar's Forecasts module incorporates revenue line item records to build forecasting worksheets and predict sales. Users can work towards sales quotas at the individual, team, and sales organization level.

Before users can access the Forecasts module to begin building forecasting worksheets, a user with administrator access must configure the Forecasts module with the organization's desired Time Periods, Ranges, and Scenarios. For more information on setting up the Forecasts module, please refer to the Forecast

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Configuration documentation in the Administration Guide.

Sales representatives use the Forecasts module to work with their assigned revenue line items as the current time period progresses. These users will commit total predictions for their personal sales based on the revenue line items they expect to close. For instructions specific to a sales representative's use of the module, please refer to the Sales Representative section of this documentation.

Sales managers work with their own revenue line item records similarly to other sales representatives. In addition, they aggregate their reportee's committed forecast amounts to predict their total team's sales and work towards the team's quota for each time period. For instructions specific to a sales manager's use of the module, please refer to the Sales Managers section of this documentation.

Additional insights are offered by the elements of the expandable Intelligence Pane including analysis for an individual's worksheet and analysis for a manager's team worksheets. For more information, please refer to the sales representative Intelligence Pane and the sales manager Intelligence Pane sections of this documentation.

Note: If your instance is configured to use opportunities alone without revenue line items, please refer to the Forecasts documentation in the Professional Edition Application Guide. For more information about changing your opportunities model via Admin > Opportunities, please see the Opportunities Configuration documentation in the Administration Guide.

## Forecast Fields

The Forecasts module contains the following fields which enable users to work with revenue line item records to forecast sales for a given time period. Users with administrator or developer access have the ability to enable fields for use in the Forecasting module via Admin > Forecasts. Many revenue line item fields are available to be added to the forecasting worksheet. For more information please refer to the Forecast Configuration documentation in the Administration Guide.

Field	Description
Account Name	The account to which the revenue line item belongs; cannot be in-line edited from the Forecasts module
Best	The revenue line item's Best field representing the most optimistic total amount; automatically set to match Likely when Sales Stage is "Closed -

	Lost" or "Closed - Won"
Best (Adjusted)	For managers, the Best value with an optional, manual adjustment above or below your reportee's committed Best total and your own worksheet's Best total; reported to your manager as the Best value when committing your forecast
Expected Close Date	The revenue line item's expected date of completion
Forecast	The revenue line item's commit range (e.g. "Include", "Exclude", etc.) based on the revenue line item's initial probability and the user's edits; controls whether the revenue line item is counted in the forecast's totals and allows for filtering; automatically set to "Included" when Sales Stage is "Closed - Won" and "Excluded" when Sales Stage is "Closed - Lost"
Likely	The revenue line item's Likely field representing the most likely total amount
Likely (Adjusted)	For managers, the Likely value with an optional, manual adjustment above or below your reportee's committed Likely total and your own worksheet's Worst total; reported to your manager as the Likely value when committing your forecast
Opportunity Name	The revenue line item's related opportunity; cannot be in-line edited from the Forecasts module
Probability	The revenue line item's current probability of being won  Note: This value is calculated based on the selected Sales Stage and cannot be edited.
Quota	For sales representatives, your individual quota for this sales time period as assigned by your manager



	For managers, your quota for this sales time period as assigned by your manager
Quota (Adjusted)	For mid-level managers, your team's quota with an optional, manual increase above your team's assigned quota; when assigning quota to your reportees, this is the quota value they will receive
Revenue Line Item Name	The revenue line item's name; cannot be in-line edited from the Forecasts module
Stage	The revenue line item's current sales stage
Tags	User-created keywords or phrases used to find, group, and classify data by common attributes
Worst	The revenue line item's Worst field representing the least optimistic total amount; automatically set to match Likely when Sales Stage is "Closed - Lost" or "Closed - Won"
Worst (Adjusted)	For managers, the Worst value with an optional, manual adjustment above or below your reportee's committed Worst total and your own worksheet's Worst total; reported to your manager as the Worst value when committing your forecast

## Forecasts Module Tab

The Forecasts module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen to the right of the home cube icon. Depending on your settings, you may have to click "Show More" in order to see the Forecasts module tab. Click the tab to access the Forecasts module. A user with administrator access must first configure the Forecasts module before it can be accessed and used. For more information on setting up the Forecasts module, please refer to the Forecast Configuration documentation in the Administration guide.

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

- The Forecasts module may be marked as hidden in your user preferences

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

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

## Forecast Actions

Forecast actions are available at the top of the Forecasts module page and allow users to perform the following operations:

Menu Item	Description
Save Draft	Saves changes to the user's worksheet but does not make these changes available to the user's manager
Commit	Saves changes to the current worksheet and pushes these changes to the user's manager's team worksheet or, in the case of a manager committing a personal worksheet, to his or her own team worksheet. For managers viewing a team worksheet, the Commit button will be enabled after any committed change to his or her own worksheet or a reportee's worksheet.
Assign Quota	For managers, pushes quota changes to reportees' forecasting worksheets.
Export CSV	Exports the rows of the current forecasts worksheet
Settings	For users with administrator access, opens the Forecast Configurations wizard

## Sales Representatives

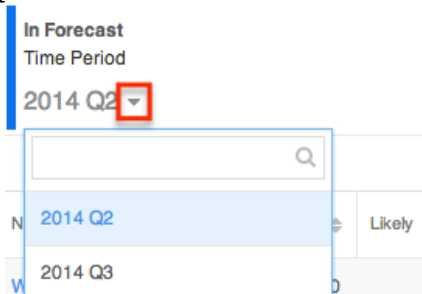
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Sales representatives use the Forecasts module to work with their assigned revenue line items as the current time period progresses. These users will commit total predictions for their personal sales based on the revenue line items they expect to close.

When you access the Forecasts module as a sales representative, you will see your name at the top left of the screen. Sales representatives who do not have any reportees will only be able to see and work with his or her own revenue line items. Below your name, you will see a time period selection, summary and commit history, filter, and worksheet. On the right side of each page is an expandable Intelligence Pane which offers additional insight into your forecasting worksheet.

## Time Periods

Below your name, you will see the current time period for which you are forecasting revenue line items to meet a quota. The length and the start date of this time period depend on the Time Periods configuration set up by your administrator. Clicking the arrow to the right of the current time period allows you to choose a future or past time period, the availability of which is also determined by the administrator's Time Periods configuration. Select a past or future time period to work with revenue line items and forecast for those periods.



## Summary and Commit History

To the right below the Time Period selection, you will see a summary of your current forecasting numbers for the time period currently in view. The large numbers are your current worksheet's Quota, Likely, Best, and Worst predictions. The smaller numbers show your most recent commit's Likely, Best, and Worst predictions. Any red or green arrows next to the large numbers show whether you worksheet's current (uncommitted) numbers are higher or lower than your most recent commit.

Note: You may or may not see the Best and Worst options depending on how your administrator has configured the Forecasts module. By default, the Worst field is disabled and must be enabled by the administrator via Admin > Forecasts > Scenarios.

Quota	Worst	Likely	Best
\$12,241.33	↑ \$10,116.33	↑ \$12,001.11	↑ \$13,885.89
	\$8,316.33	\$10,201.11	\$12,085.89

Last Commit: 15 days ago ↕

2016-03-29 08:50 Updated Forecast worst up ↑ \$1,386.06 to \$8,316.33, likely up ↑ \$1,700.19 to \$10,201.11, and best up ↑ \$2,014.31 to \$12,085.89

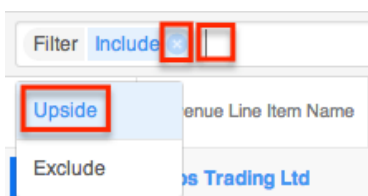
2016-03-29 08:50 Setup Forecast worst up ↑ \$6,930.28 to \$6,930.28, likely up ↑ \$8,500.93 to \$8,500.93, and best up ↑ \$10,071.57 to \$10,071.57

To the left of these summary numbers, you will see the date of your most recent commit. There will be no date shown if you have not yet committed for this time period. By clicking the arrow to the right of the latest commit date, a dark grey panel will appear showing the timestamp of the last commit with a history of your commits for this time period along with the changes for each forecasting number from the previous commit.

## Filters

Below the summary and commit history, you will see a filter bar which controls what kinds of revenue line items are displayed. By default, the "Include" filter will be active, meaning that only the revenue line items with a probability falling within the Include range specified during the administrator's Ranges configuration will be displayed. To add additional filters, click on the Filters bar and choose additional ranges. The filter(s) (e.g. Include, Exclude) added to the Filters bar will be preserved when you navigate away from the module. Returning to the Forecasts module will automatically display the revenue line items based on the filter(s) you last applied.

Please note the Upside and custom ranges may or may not be available depending on the administrator's Ranges configuration. To remove ranges from the filter, click the "x" for each filter name. Removing all filters will display all of your assigned revenue line items.



## Column Resizing

You can easily adjust the size of columns in the forecasting worksheet based on your viewing preference. Simply place your cursor on the column divider, and when the left-and-right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies.

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

Forecast	Revenue Line Item Name	Opportunity Name	Account Name	Expected Close Date	...
Include	Calm Sailing Inc	Calm Sailing Inc	Calm Sailing Inc	03/16/2015	
Include	JAB Funds Ltd.	JAB Funds Ltd.	JAB Funds Ltd.	01/25/2015	
Include	Nimble Technologies Inc	Nimble Technologies Inc	Nimble Technologies...	03/22/2015	

## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the list view may only be sorted by one column at a time.

Forecast	Expected Close Date	Stage	Probability	Likely	Best	...
Include	2013-10-14	Qualification	50	\$758.00	\$758.00	
Include	2013-10-16	Id. Decision ...	40	\$3,459.00	\$3,854.00	
Include	2013-10-14	Prospecting	10	€662.00 \$735.56	€931.00 \$1,034.44	
<b>Total</b>				\$4,952.56	\$5,646.44	

## 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 on the forecasting worksheet. For more information, please refer to the Forecast Configuration documentation in the Administration Guide.

Forecast	Revenue Line Item Name	Opportunity Name	Account Name	Expected Close Date	Product	...
Include	Kaos Trading Ltd	Kaos Trading...	Kaos Tradin...	08/18		<input checked="" type="checkbox"/> Forecast <input checked="" type="checkbox"/> Revenue Line Item Name <input checked="" type="checkbox"/> Opportunity Name <input checked="" type="checkbox"/> Account Name
Include	Kaos Trading Ltd	Kaos Trading...	Kaos Tradin...	08/06		
Include	Kaos Trading Ltd	Kaos Trading...	Kaos Tradin...	07/23		
Include	Start Over Trust	Start Over Tr...	Start Over T...	08/21		

## Line Items and Totals

Based on the chosen filters, you will see all or some of your assigned revenue line items for the currently selected time period listed below the Filters bar. On the far left of each row, a blue bar will appear to indicate whether or not the row's amounts are included in the totals for this time period. The presence of the blue bar indicates the row is being counted. In addition to the range called "Include", multiple forecast ranges may be counted towards your totals depending on how your administrator has configured forecast ranges for the instance. For more information about making more than one range included in totals, please refer to the Forecast Configuration documentation in the Administration Guide. The range and thus the inclusion of each row can be changed manually via this view. You can work directly with your revenue line item records by in-line editing their probabilities and amounts from the Forecasts module or by clicking the Name field to open a record in the Revenue Line Items module where you can make additional edits. To the right of each row is a preview button which will allow you to view details about the revenue line item record in your intelligence pane.

Forecast	Revenue Line Item Name	Expected Close Date	Stage	Probability	Worst	Likely	Best
Include	5D Investments	10/20/2014	Negotia...	80	\$4,100.00	\$4,500.00	\$5,100.00
Include	Airline Maintenance ...	10/24/2014	Negotia...	80	\$6,672.00	\$7,398.00	\$8,124.00
Include	A.D. Importing Com...	10/29/2014	Negotia...	80	\$40,100.33	\$47,216.33	\$48,316.33
<b>Displayed Total</b>					<b>\$50,872.33</b>	<b>\$59,114.33</b>	<b>\$61,540.33</b>
<b>Overall Total</b>					<b>\$81,396.60</b>	<b>\$99,457.27</b>	<b>\$111,701.93</b>

At the bottom of the list, the "Displayed Total" and "Overall Total" rows display sums of the Worst, Likely, and Best amount columns. The Displayed Total row shows the sum of the Worst, Likely, and Best amounts (both included and excluded) displayed on the worksheet based on the filters currently applied. The Overall Total row displays the totals (both included and excluded) of all revenue line items' amounts in this time period regardless of any filters currently applied.

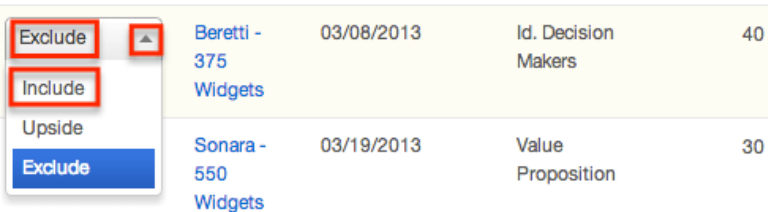
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## Editing Forecast Inclusion

The first time a revenue line item is loaded to a worksheet, Sugar will assign it a category of either "Include", "Exclude", "Upside" (optional), or a custom range based on the Ranges configured by your administrator. The revenue line items with a higher probability of being won are typically assigned to the Include range while those with a lower probability of being won are designated for the Exclude range. Your administrator may have chosen to use the Upside range or to create a number of other, custom ranges - each with their own non-overlapping range of probabilities. Custom ranges may also exist which have no association with probabilities.

Since one or more ranges may be considered as included depending on your administrators' configuration, the blue bars to the left of each row will update to reflect which items are included and which are excluded based on your updates to each's forecast range.

You may wish to alter the category automatically assigned to your revenue line items by these administrator-configured ranges especially as each revenue line item moves forward in the sales process and becomes more likely to be won. To do this, simply click on the revenue line item's current category in the Forecast column and choose the desired category from the dropdown menu.



Exclude	Beretti - 375 Widgets	03/08/2013	Id. Decision Makers	40
Include				
Upside				
Exclude	Sonara - 550 Widgets	03/19/2013	Value Proposition	30

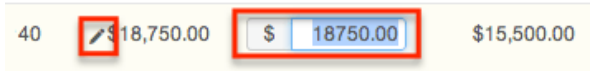
Changing a revenue line item's Forecast column to an included range such as "Include" will cause its Likely, Best, and Worst fields to be added to your totals while choosing an excluded range such as "Exclude" will remove the revenue line item's numbers from your totals. Changing which revenue line items are included on your worksheet requires you to save a draft or commit in order to preserved.

Note: All revenue line items in a Closed Won stage will be included in the worksheet and cannot have their Forecast column altered. All revenue line items in a Closed Lost stage will be excluded from the worksheet and cannot have their Forecast column altered.

## Editing Revenue Line Item Fields

In addition to editing the inclusion, you can make in-line changes to each revenue line item's fields including Sales Stage, Likely, Best, and Worst. To do so, simply click any field which shows a pencil icon when being hovered over, and enter the

new amount. Keep in mind that your worksheet may or may not include "Best" and "Worst" depending on your administrator's Scenarios configuration.



Clicking outside the text box or pressing Enter/Return will save your change to the line and update the worksheet's totals, summary, and Intelligence Pane. Clicking the Save Draft or Commit button will also update the revenue line item records themselves and make your changes visible when viewing the revenue line item in other places in Sugar. Saving a draft or committing is also required to preserve these changes to your worksheet and, in the case of committing, make the changes visible in your manager's Forecasting module.

### Currency Support

If you use a currency different from your Sugar instance's default currency, your Likely, Best, and Worst amounts will be displayed in the system's default currency in the Forecasting module. Clicking to edit these amount values will, however, display and allow for editing in your chosen currency.

### Intelligence Pane

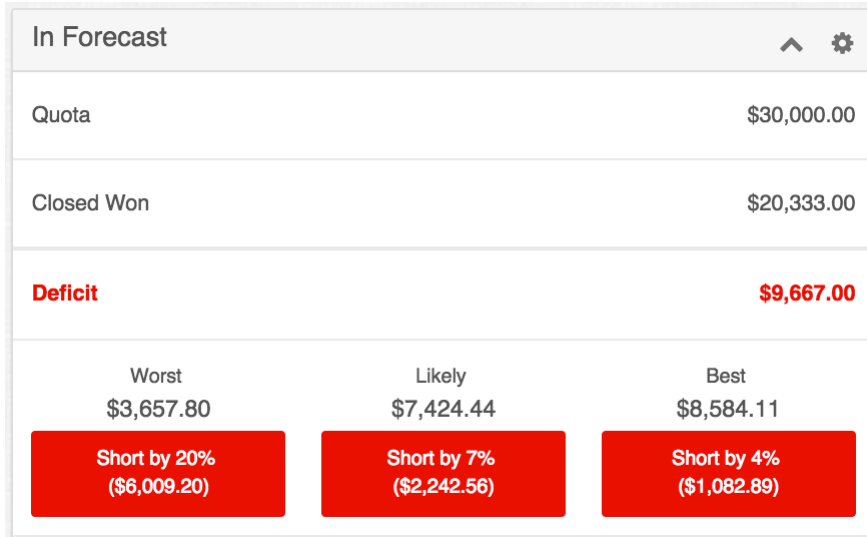
To the right of the forecasting worksheet, you will find an expandable intelligence pane which provides additional insights for planning and forecasting. If the pane is hidden, click the double-arrow button to expand it. Clicking the button again will hide it when you wish to see your worksheet at full width. The out-of-the-box default dashboard, "Forecasts Dashboard", contains two default dashlets which help provide additional insight into your forecasting worksheet, the In Forecast and Forecast Bar Chart dashlets. For more information about using dashboards, refer to the Dashboards and Dashlets documentation.

A screenshot of the Sugar CRM forecasting interface. At the top, it shows 'Max Jensen' with 'Save Draft' and 'Commit' buttons. A double-arrow button is highlighted with a red box. To the right is the 'My Dashboard' section with a 'Create' button also highlighted with a red box. The main area is divided into two panes. The left pane is titled 'In Forecast' and shows a table for '2014 Q2' with columns for 'Quota', 'Likely', and 'Best'. The values are: Quota \$17,628.00, Likely \$29,579.89, Best \$34,248.11. Below the table, it says 'Last Commit: 6 days ago at 15:17'. The right pane is also titled 'In Forecast' and shows a summary of the forecast. It includes 'Quota \$17,628.00', 'Closed Won \$11,951.89', and a 'Deficit \$5,676.11'. At the bottom, it shows 'Likely \$17,628.00' and 'Best \$20,912.00' with green boxes indicating 'Exceed by 68% (\$11,951.89)' and 'Exceed by 86% (\$15,235.89)'. At the bottom of the interface, there is a table header with columns: Forecast, Revenue Line Item Name, Opportunity Name, Account Name, Exp, and ...



## In Forecast Dashlet

The In Forecast dashlet appears at the top of the Intelligence Pane and gives a breakdown of how your revenue line items match up to your quota. Keep in mind that your In Forecast dashlet may or may not include "Best" and "Worst" depending on your administrator's Scenarios configuration.



The In Forecast dashlet's values are calculated based on the most recent updates to your worksheet even if the changes have not yet been saved as a draft or committed. The values take all of your revenue line items into account regardless of any filters currently being used in your worksheet. Their meanings are as follows:

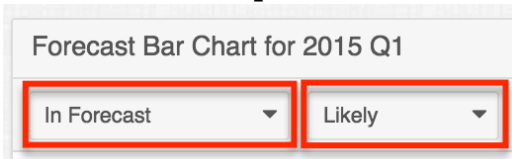
Field	Description
Quota	Your personal quota for this sales time period as assigned by your manager
Closed Won	The total amount of your Closed Won revenue line items
Deficit	The difference between your quota and the total amount of your Closed Won revenue line items; the additional revenue needed to be won in order to meet your quota
Likely	The total of the Likely amounts for the included revenue line items which are not yet Closed Won
(Likely Colored Box)	When summing your Closed Won amounts and your Likely amounts for included revenue line items, in red, the

	remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota
Best	(Optional) The total of the Best amounts for the included revenue line items which are not yet Closed Won
(Best Colored Box)	(Optional) When summing your Closed Won amounts and your Best amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota
Worst	(Optional) The total of the Worst amounts for the included revenue line items which are not yet Closed Won
(Worst Colored Box)	(Optional) When summing your Closed Won amounts and your Worst amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota

### Forecast Bar Chart Dashlet

The Forecast Bar Chart appears on the bottom of the Intelligence Pane and provides a configurable chart showing different cuts of your forecasting data over the course of the selected time period. Each revenue line item's Expected Close Date field determines in which sub-period it appears. Only the revenue line items currently appearing on your worksheet will appear in your chart meaning that the chart respects your current filters. The Forecast Bar Chart dashlet's values are calculated based on the most recent updates to your worksheet even if the changes have not yet been saved as a draft or committed. Throughout all chart configurations, the dotted black line represents your quota for the given time period and can be hovered over to view the quota amount.

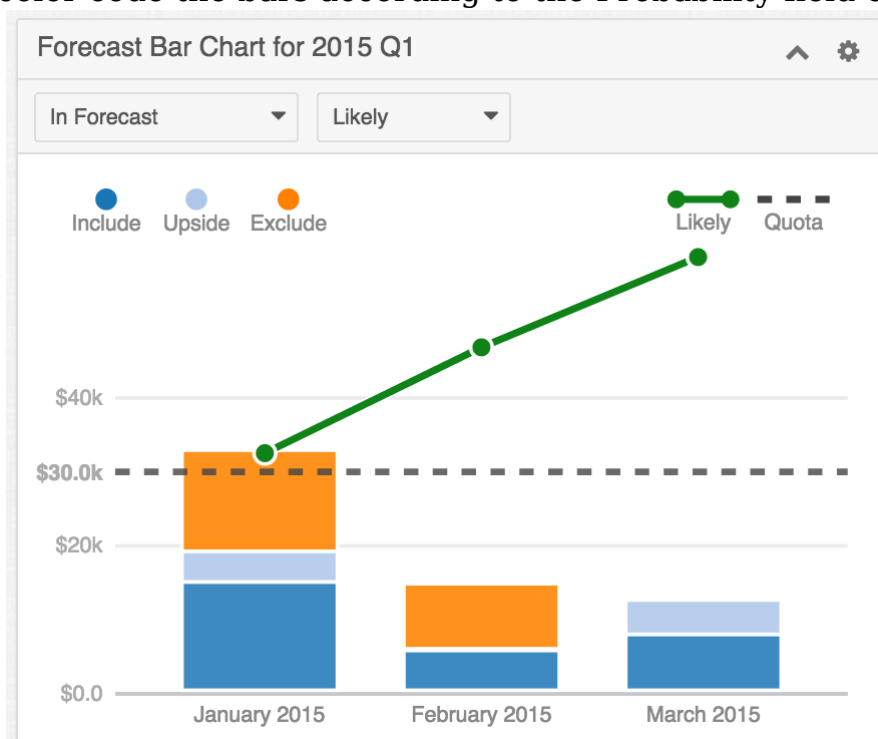
Use the two dropdown menus to control what is displayed in the chart.



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When "Likely" is chosen, each green point represents the total Likely amounts for all revenue line items currently appearing in your filtered worksheet for that sub-period and any previous sub-periods falling within the selected time period. Choosing "Best" or "Worst" shows the same points using the revenue line items' Best or Worst amounts instead. A green line connects these points showing the change in your possible cumulative amounts.

Each sub-period also displays bars which represent the Likely, Best, or Worst amounts (depending on the chosen dropdown option) for the revenue line items currently appearing in your filtered worksheet. Choosing "In Forecast" will color code segments of these bars according to each revenue line item's Forecast field (i.e. "Include", "Exclude", etc). Choosing "Sales Stage" will color code the bars according to the Stage field of each revenue line item. Choosing "Probability" will color code the bars according to the Probability field of each revenue line item.



Note: You may or may not see "Best" and "Worst" as options in the second dropdown depending on your administrator's Scenarios configuration.

## Sales Managers

Sales managers work with their own revenue line item records similarly to other sales representatives. In addition, they aggregate their reportee's committed forecast amounts to predict their total team's sales and work towards the team's quota for each time period.

When you access the Forecasts module as a sales manager, you will see your name

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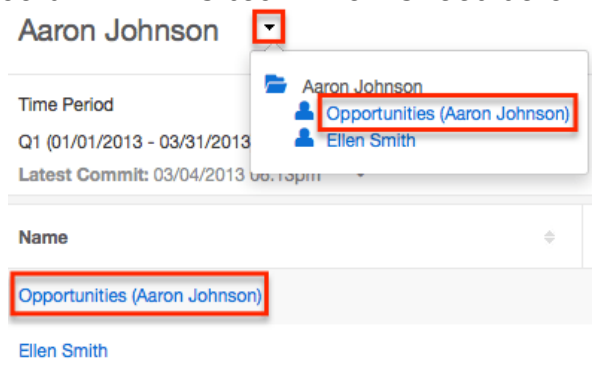
at the top left of the page along with an arrow which allows you to drill down into your personal worksheet, your team worksheet, and your reportee's worksheets hierarchically. While working with your personal worksheet works similarly to how a regular sales representative works with their revenue line item, you will also have options such as time period selection, summary and commit history, and filters when working with your team worksheet and your reportees' forecasting data. On the right side of each page is an expandable intelligence pane which offers additional insight into your forecasting worksheet.

## Forecast Drilldown

Because sales managers are able to see and work with their reportee's revenue line items in addition to their own, these users will see an arrow next to their name at the top left of the Forecasts module. This allows them to drill into team forecasting data and individual sales representatives' revenue line items. By default, Aaron will enter the Forecasts module viewing his team worksheet which includes the total committed amounts and quotas for each immediate reportee and himself.

## Own Line Items

As a manager, Aaron can see and work with his own revenue line items by selecting "Aaron Johnson (me)" from the menu next to his name or from the Name column in his team worksheet below.

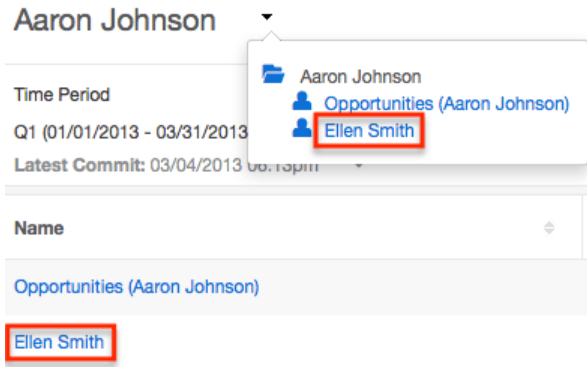


While working with his own revenue line items, he will have the same options on his worksheet as a regular sales representative has. For more information on working with a manager's forecasting worksheet, please refer to the Line Items and Totals section of this documentation. Aaron will need to commit his new revenue line items or changes to his revenue line items on his worksheet before the amounts will be reflected on his team worksheet.

## Reportee's Line Items

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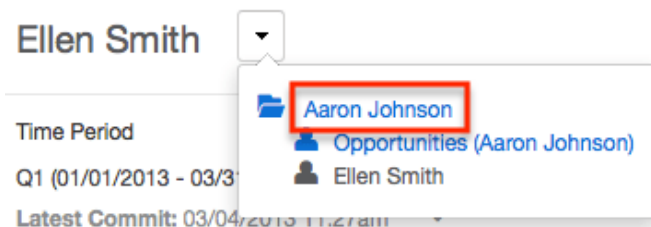
Since Aaron is Ellen's manager, Aaron also has the ability to work with Ellen's committed forecast and revenue line items. He can navigate to her committed worksheet by selecting "Ellen Smith" from the menu next to his name or from the Name column in his team worksheet below.



While viewing his reportee's worksheet, Aaron will not be able to edit any of the revenue line items' amounts or probabilities. He is able to filter for various ranges, change the time period, and view Ellen's summary and commit history for each time period.

## Team Worksheet

Aaron can return to his team worksheet by choosing his own name from the Drilldown menu.



While viewing his team worksheet, he has the ability to set each team member's quota as well as to set adjusted Likely, Best, and Worst amounts. Please note that your worksheets may or may not include "Best" and "Worst" depending on your administrator's Scenarios configuration. To edit an adjusted amount or quota, click on the number, enter a new value, and click outside the text box or press Return/Enter. Clicking "Save Draft" will preserve these changes in the worksheet but will not push the changes to other Sugar users. Upon clicking "Commit", these adjusted amounts will be pushed to Aaron's manager thus appearing in Joy's worksheet as his committed amounts. Any changes to quotas will also be pushed to his reportee's worksheets.

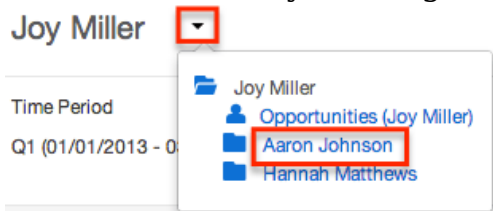
Likely Case	Likely (Adjusted)	Best Case	Best (Adjusted)	Worst Case	Worst (Adjusted)	
\$40,000.00	\$ 0.00	\$40,000.00	\$0.00	\$30,000.00	\$0.00	i
\$46,500.00	\$46,500.00	\$49,500.00	\$49,500.00	\$37,500.00	\$37,500.00	i
\$86,500.00	\$46,500.00	\$89,500.00	\$49,500.00	\$67,500.00	\$37,500.00	

From the team worksheet, managers will see an "i" icon on the far right of each row where there are newly committed changes. Clicking the "i" opens the most recent commit history for that team member.

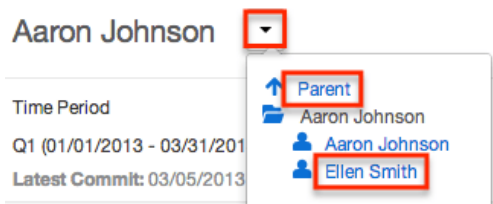
Note: Although it is possible for Aaron to set or alter his own personal quota, it is recommended that intermediate managers not make changes to their personal quota. Rather, Aaron's manager, Joy, should set the quota for his entire team from her team worksheet.

### Management Hierarchy

The ability to drill into a reportee's team worksheet and revenue line items continues up the management chain. Joy is Aaron's manager and views her own team worksheet by default when first opening the Forecasts module. She is also able to drill into her own revenue line items by clicking her own name, Aaron's team worksheet by clicking his name, or her other reportee's team worksheet.

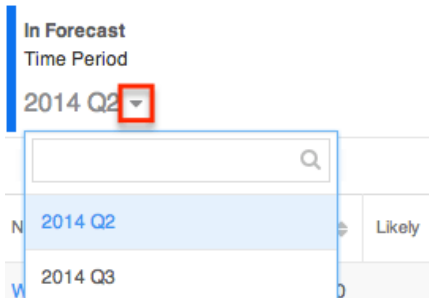


When Joy navigates to her reportee Aaron's team worksheet, Aaron's name now appears and his team worksheet is displayed in read-only mode. Joy can further drill down to see the worksheets of Aaron's team's members in read-only mode. This drilling can continue recursively down through the management chain as needed. Clicking "Parent" will move up one level of the hierarchy, bringing Joy back to her own team worksheet.



## Time Periods

Below the currently selected drilldown name, you will see the time period for which you are forecasting to meet the time period's quota for your team. The length and the start date of this time period depend on the Time Periods configuration set up by your administrator. At every level of drilldown, sales managers can click the arrow to the right of the current time period and choose a future or past time period, the availability of which is also determined by the administrator's Time Periods configuration. Select a past or future time period to work with revenue line items and forecast for those periods.



## Summary and Commit History

To the right below the Time Period selection, you will see a summary of the current forecasting numbers for the time period and drilldown level currently in view. The large numbers are your current worksheet's Quota, Likely, Best, and Worst predictions. The smaller numbers show your most recent commit's Likely, Best, and Worst predictions. Any red or green arrows next to the large numbers on a manager's personal worksheet or own team worksheet show whether your worksheet's current (uncommitted) numbers are higher or lower than the most recent commit. Please note that you may or may not see a Best and Worst depending on your administrator's Scenarios configuration.

Quota	Worst	Likely	Best
\$12,241.33	↑ \$10,116.33	↑ \$12,001.11	↑ \$13,885.89
	\$8,316.33	\$10,201.11	\$12,085.89

Last Commit: 15 days ago

2016-03-29 08:50	Updated Forecast worst up ↑ \$1,386.06 to \$8,316.33, likely up ↑ \$1,700.19 to \$10,201.11, and best up ↑ \$2,014.31 to \$12,085.89
2016-03-29 08:50	Setup Forecast worst up ↑ \$6,930.28 to \$6,930.28, likely up ↑ \$8,500.93 to \$8,500.93, and best up ↑ \$10,071.57 to \$10,071.57

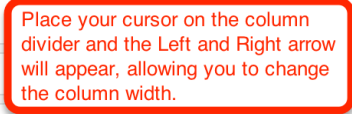
To the left of these summary numbers, you will see the date of the most recent commit. On a manager's personal worksheet and own team's worksheet, there will be no date shown if you have not yet committed for this time period. By clicking

the arrow to the right of the latest commit date, a dark grey panel will appear showing the timestamp of the last commit with a history of the commits for the worksheet currently in view for this time period along with the changes for each forecasting number from the previous commit.

## Column Resizing

You can easily adjust the size of columns in the forecasting worksheet based on your viewing preference. Simply place your cursor on the column divider, and when the left-and-right arrow appears, click and drag the column to the desired size. The set column width will be preserved when you navigate away from the page. Sugar will render the preferred column size across sessions until the user removes or resets the relevant browser cookies.

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



Forecast	Revenue Line Item Name	Opportunity Name	Account Name	Expected Close Date	...
Include	Calm Sailing Inc	Calm Sailing Inc	Calm Sailing Inc	03/16/2015	
Include	JAB Funds Ltd.	JAB Funds Ltd.	JAB Funds Ltd.	01/25/2015	
Include	Nimble Technologies Inc	Nimble Technologies Inc	Nimble Technologies...	03/22/2015	

## Column Sorting

List view provides the ability to sort all of the current search results by a field column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the list view may only be sorted by one column at a time.

Forecast	Expected Close Date	Stage	Probability	Likely	Best	...
Include	2013-10-14	Qualification	50	\$758.00	\$758.00	
Include	2013-10-16	Id. Decision ...	40	\$3,459.00	\$3,854.00	
Include	2013-10-14	Prospecting	10	€662.00 \$735.56	€931.00 \$1,034.44	
Total				\$4,952.56	\$5,646.44	

## Column Selection



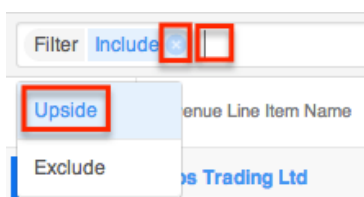
Sugar gives users the ability to personalize the list view by specifying which fields they want to be displayed in the list view. You can click the Column Selection icon to the far right of the list view column headers to see the list of available fields. Click a field name to toggle whether or not it 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 in the Administration guide.

Forecast	Revenue Line Item Name	Opportunity Name	Account Name	Expected Close Date	Product	...
Include	Kaos Trading Ltd	Kaos Trading...	Kaos Tradin...	08/18		<input checked="" type="checkbox"/> Forecast <input checked="" type="checkbox"/> Revenue Line Item Name <input checked="" type="checkbox"/> Opportunity Name <input checked="" type="checkbox"/> Account Name
Include	Kaos Trading Ltd	Kaos Trading...	Kaos Tradin...	08/06		
Include	Kaos Trading Ltd	Kaos Trading...	Kaos Tradin...	07/23		
Include	Start Over Trust	Start Over Tr...	Start Over T...	08/21		

## Filters

Below the summary and commit history of each worksheet, managers will see a filter bar which controls what kinds of revenue line items are displayed. By default, the "Include" filter will be active, meaning that only the revenue line items with a probability falling within the Include range specified during the administrator's Ranges configuration will be displayed. To add additional filters, click on the Filters bar and choose additional ranges. The filter(s) (e.g. Include, Exclude) added to the Filter bar will be preserved when you navigate away from the module. Returning to the Forecasts module will automatically display the revenue line items based on the filter(s) you last applied.

Please note the Upside or custom ranges may or may not be available depending on the administrator's Ranges configuration. To remove ranges from the filter, click the "x" for each filter name. Removing all filters will display all of your assigned revenue line items. Please note that when viewing your reportee's worksheets, only the revenue line items they have committed as included will be visible.



## Intelligence Pane

To the right of the forecasting worksheet, you will find an expandable Intelligence Pane which provides additional insights for planning and forecasting. If the pane is hidden, click the double-arrow button to expand it. Clicking the button again will hide it when you wish to see your worksheets at full width. The out-of-the-box default dashboard, Forecasts Dashboard, contains two default dashlets which help provide additional insight into your forecasting worksheet, the In Forecast and Forecast Bar Chart dashlets. For more information about using dashboards, refer to the Dashboards and Dashlets documentation.

The screenshot shows a forecasting interface with a user profile 'Sarah Smith' and a 'My Dashboard' section. The 'In Forecast' dashlet is expanded, showing a summary table and a list of team members.

	Quota	Likely	Best
	<b>\$24,393.69</b>	<b>\$63,800.86</b>	<b>\$74,047.00</b>
		\$63,800.86	\$74,047.00

Name	Quota (Adjusted)	Likely	Likely (Adjusted)	Best
Sarah Smith...	\$1,213.78	\$13,606.89	\$17,008.61	\$15,47...
Sally Bronsen	\$5,551.91	\$13,769.89	\$17,212.36	\$16,36...

	Likely	Best
	\$32,929.31	\$43,175.44
	<b>Exceed by 162%</b> (\$39,407.17)	<b>Exceed by 204%</b> (\$49,853.31)

## In Forecast Dashlet

The In Forecast dashlet appears at the top of the Intelligence Pane and gives a breakdown of how your team's revenue line items match up to your quota. Please keep in mind that the In Forecast dashlet may or may not include "Best" and "Worst" depending on your administrator's Scenarios configuration.

In Forecast		
Quota	\$23,043.06	
Quota (Adjusted)	\$28,803.83	
Closed Won	\$20,333.00	
<b>Deficit</b>	<b>\$8,470.83</b>	
Worst \$24,106.91	Likely \$27,873.56	Best \$29,033.22
Exceed by 54% (\$15,636.08)	Exceed by 67% (\$19,402.73)	Exceed by 71% (\$20,562.39)

The In Forecast dashlet's values are calculated based on the most recent updates to the worksheet even if the changes have not yet been saved as a draft or committed. The values take all of your and your team's revenue line items into account regardless of any filters currently being used in your worksheet. Their meanings are as follows:

Field	Description
Quota	Your team's quota for this sales time period as assigned by your manager
Quota (Adjusted)	For mid-level managers, your team's quota with an optional, manual increase above your team's assigned quota; when assigning quota to your reportees, this is the quota value they will receive
Closed Won	The total amount of your team's Closed Won revenue line items
Deficit	The difference between your team's adjusted quota and the total amount of your team's Closed Won revenue line items; the additional revenue needed to be won in order to meet your adjusted quota
Likely	The total of the Likely amounts for the included revenue line items which are not yet Closed Won

(Likely Colored Box)	When summing your team's Closed Won amounts and Likely amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota
Best	(Optional) The total of the Best amounts for the included revenue line items which are not yet Closed Won
(Best Colored Box)	(Optional) When summing your team's Closed Won amounts and Best amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota
Worst	(Optional) The total of the Worst amounts for the included revenue line items which are not yet Closed Won
(Worst Colored Box)	(Optional) When summing your team's Closed Won amounts and Worst amounts for included revenue line items, in red, the remaining quota shortage and percentage of quota still outstanding or, in green, the quota overage and percentage exceeded above quota

When drilled into your own or a reportee's forecasting worksheet, the Quota (Adjusted) row will not be displayed and the dashlet will function as it does for sales representatives without reportees. For more information on the meanings and configuration of the table while viewing you or a reportee's worksheet, please refer to the In Forecast dashlet section within the Sales Representatives section of this documentation.

### Forecast Bar Chart Dashlet

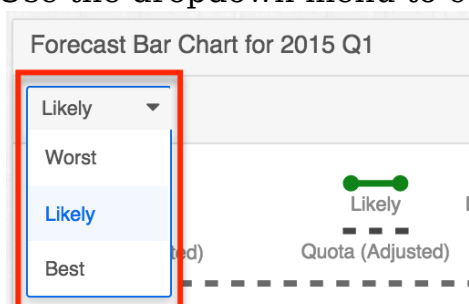
The Forecast Bar Chart appears on the bottom of the Intelligence Pane and provides a configurable chart showing different cuts of your team members' forecasting data. Throughout all chart configurations, the dotted black line represents your adjusted quota for the given time period and can be hovered over to view the quota amount.

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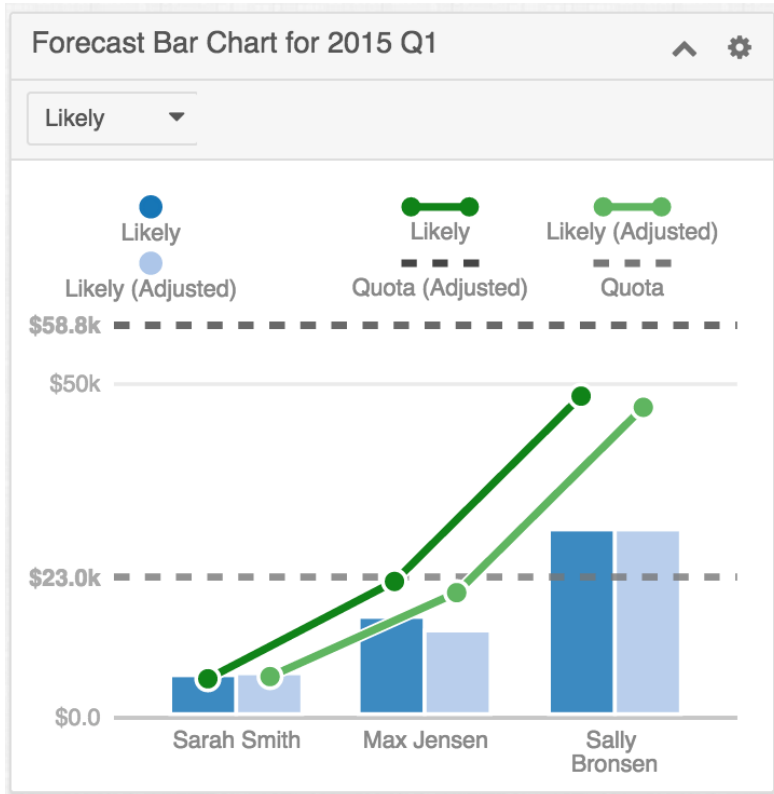
While viewing your or a reportee's worksheet, the charts will display the relevant revenue line items over the course of the selected time period. In these views, the charts function in the same way as they do for support representatives without reportees. For more information on the meanings and configuration of the chart while viewing your or a reportee's worksheet, please refer to the Forecast Bar Chart section within the Sales Representative section of this documentation.

While viewing your or a reportee's team worksheet, the charts will display the current worksheet's totals in bars grouped by user. Throughout all chart configurations, the dotted black line represents the worksheet's adjusted quota for the given time period and can be hovered over to view the quota amount.

Use the dropdown menu to configure what is displayed in the chart.



When "Likely" is chosen, each dark blue bar represents the total committed Likely amount for each user within the current team worksheet. Each light blue bar represents the total adjusted Likely amounts for each user. The dark green dots show the cumulative Likely total of the team built user-by-user from left to right with the rightmost point representing the total Likely amount for the entire team. The light green dots and line do the same using the adjusted Likely team total.



Choosing "Best" shows similar chart elements except that the Best and adjusted Best amounts are used. Choosing "Worst" does the same with Worst and adjusted Worst amounts.

Note: You may or may not see "Best" and "Worst" as options in the second dropdown depending on your administrator's Scenarios configuration.

## Saving Forecast Drafts

Whenever new information is added or changes are made to your current forecasting worksheet, the Save Draft button will become activated. Click this button to save your changes to the current worksheet without submitting these changes to your manager. This provides an opportunity to work with your forecast data before pushing more finalized amounts up the management chain. Clicking "Save Draft" will also cause any changes to your personal revenue line items' amounts and/or probability to alter the revenue line item record itself, making these new numbers visible on the revenue line item in other areas of Sugar.



## Committing Forecasts

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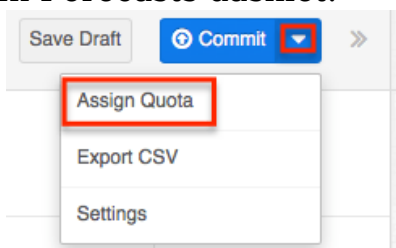
Whenever new information is added or changes are made to your current forecasting worksheet, the Commit button will become activated. Click this button to save your changes to the current worksheet and to submit these changes to your manager or to the team worksheet if you are a manager working on your personal worksheet. Clicking "Commit" will also cause any changes to your personal revenue line item' amounts and/or probability to alter the revenue line item record itself, making these new numbers visible on the revenue line item in other areas of Sugar.

For sales managers, changes to your reportees' quotas will appear in their Forecasts module when you perform a commit or when using the Assign Quota option. Either action will also update your quota and your reportees' quotas in the



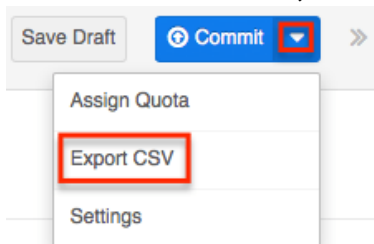
## Assigning Quotas

After a manager makes changes to the quotas for his or her reportees, the new quota will become visible in the reportees' Forecasts module when the manager clicks "Assign Quota" in the Actions menu in addition to when they commit their forecast. Either action will also update your quota and your reportees' quotas in the In Forecasts dashlet.



## Exporting Forecasts

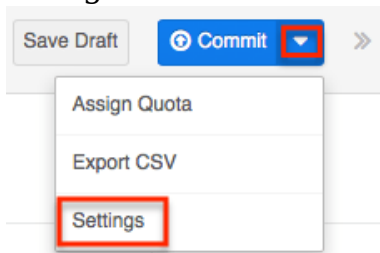
The Export option is available on every forecasting page and exports every line of the current worksheet. The resulting CSV file can be used in other programs such as Microsoft Excel to view and manipulate your forecasting data. To export your current worksheet, click "Export CSV" in the Actions menu.



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## Configuring Forecasts

Users with administrator access will have a Settings option available within the Forecasts module. Choosing "Settings" will open the Forecast Configuration wizard which is also available by navigating to Admin > Forecasts. For more information on configuring the Forecasts module, please refer to the Forecast Configuration documentation in the Administration Guide.



Last Modified: 2018-06-01 22:46:19

## Quotes

### Overview

Sugar's Quotes module consists of quotes which specify the quantity and the price per unit for products or services that your organization is selling to clients. You can select a product directly from the product catalog or manually enter a product that is not in the catalog during quote creation. There are various ways you can create quotes in Sugar such as via the Quotes module and duplication. Once created, you can generate the quote as a document in PDF format and send it to your clients. This documentation will go over the basics of the Quotes module as well as the various options available in performing the actions related to the module.

For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting quote records, please refer to the Working With Quotes section of this page.

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

### Quote Fields



The Quotes 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 some fields can be leveraged differently to meet your organization's needs. Users with administrator or developer access have the ability to alter, add, or remove some fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration guide.

Field Name	Description
Actual Close Date	The date on which the quote is accepted or rejected
Assigned User	The Sugar user assigned to the quote
Billing Account Name	The Sugar account to which the quote should be billed
Billing Address	The billing address of the account to be billed for the product or service Note: This group of fields will automatically populate from the related billing account record but can be edited on the quote without affecting the address on the related account record.
Billing Contact Name	The primary contact at the billing account for this order
Converted Amount	The quote's total amount after it has been converted to the system's default currency as configured via Admin > Currencies or in the user's preferred currency when the user has "Display Preferred Currency" enabled in their user profile Note: If the applied exchange rate is modified via Admin > Currencies, the Converted Amount value will be automatically updated by a scheduled process. For more information on how currency changes affect the Converted Amount value, please refer to the Updating Currency Rates section. For more information on the Converted Amount field, please refer to the Transaction Amount vs. Converted Amount section.
Date Created	The date a user created the quote record in Sugar

Date Modified	The date the quote record was last modified in Sugar
Date Shipped	The date the order shipped to the buyer
Description	A description or other information about the quote
Discount	The discounted amount (if applicable) for the quote
Discounted Subtotal	The sum of quoted line items after any discounts have been applied
Display Line Numbers	A checkbox that controls whether the quote record's line items should be sequentially numbered
Grand Total	The sum of groups and line items after any tax, discounts, or shipping charges are applied
Opportunity Name	The name of the opportunity related to the quote
Order Stage	The current order stage (Pending, Confirmed, etc.) of the quote
Original P.O. Date	The date on which a purchase order was issued
Payment Terms	The time period within which the buyer must pay for the product or service
Purchase Order Num	The purchase order (P.O.) number given by the buyer as proof of payment authorization
Quote Number	The unique, system-generated number used to reference the quote
Quote Stage	The current stage of the quote's life cycle (Draft, Closed Won, etc.)
Quote Subject	A brief summary of the product or service to be quoted
Shipping	The shipping charge for the order Note: Value must be manually added in the Shipping field at the bottom of the quote's worksheet and saved via the quote record's Save button at the top of the page.
Shipping Account Name	The Sugar account where the product or service will be delivered

Shipping Address	The shipping address of the account that will receive the product or service Note: This group of fields will automatically populate from the related shipping account record but can be edited on the quote without affecting the address on the related account record.
Shipping Contact Name	The primary contact at the shipping account for this order
Shipping Provider	The shipping method for the order Note: Shipping providers are configured by the administrator via Admin > Shipping Providers. Only shipping providers marked "Active" are displayed as options on the quote record.
Subtotal	The sum of quoted line items before any tax, discounts, or shipping charges are applied
Tax	The tax rate to apply to the quote's taxable subtotal Note: Tax rates are configured by the administrator via Admin > Tax Rates. Only tax rates marked "Active" are displayed as options on the quote record.
Teams	The Sugar team(s) assigned to the quote record
Total Discount	The order's total discount as a currency amount
Total Discount Percentage	The order's total discount as a percentage of the total amount Note: This value is shown under the "Total Discount" label to the left of the Total Discount amount
Transaction Amount	The quote's total value in the currency in which the quote was last saved Note: For more information, please refer to the Transaction Amount vs. Converted Amount section.
Valid Until	The date that the quote expires

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## Quote Stages

The Quote Stage field represents the quote's position in its life cycle. There are eight quote stages which come out-of-the-box with Sugar, and users with administrator or developer access have the ability to modify the quote stages via the `quote_stage_dom` list in Admin > Dropdown Editor. For more information on modifying dropdown lists, please refer to the Developer Tools documentation in the Administration guide. The following definitions are suggested meanings for each quote stage, but the stages can be leveraged differently to meet your organization's needs.

Quote Stage	Description
Draft	The quote is not yet final
Negotiation	The quote has been presented to the client and the client has requested modifications
Delivered	The quote has been presented to the client for consideration
On Hold	Activity related to the quote has been temporarily suspended
Confirmed	The quote has been approved for sale
Closed Accepted	The client has accepted the terms of the quote and agreed to proceed with the sale
Closed Lost	The client has not accepted the terms of the quote and the sale has been lost
Closed Dead	The client has neither accepted nor rejected the terms of the quote, but the sale has been presumed lost

## Order Stages

The Order Stage field is typically used to track the status of an order resulting from a Closed Accepted quote. There are five order stages which come out-of-the-box with Sugar, but users with administrator or developer access have the ability to modify the order stages via the `order_stage_dom` list in Admin > Dropdown Editor. For more information on modifying dropdown lists, please refer to the Developer Tools documentation in the Administration guide. The following definitions are suggested meanings for each order stage, but the stages can be leveraged differently to meet your organization's needs.

Quote Stage	Description
Pending	The order has been sent to your internal production team or supplier
Confirmed	The order has been accepted by your internal production team or supplier
On Hold	Processing on this order has been paused
Shipped	The order has been released to the customer
Cancelled	The customer has canceled this order

## Calculated Fields

A quote's worksheet area is located just above the subpanels on a quote's record view. Users can add line items to the worksheet and then Sugar applies Sugar Logic to calculate the sum of the line items relative to applicable tax rates and any shipping charges or discount amounts that the user has specified. Several calculated fields contribute to the bottom line of a quote. These fields are shown at the top of the worksheet in the Totals bar and will instantly adjust for user-inputted data. The calculated fields are Total Discount, Discounted Subtotal, Total Tax, and Grand Total.

+		Total Discount	Discounted Subtotal	Total Tax	Shipping	Grand Total	
		5.00% \$40.45	\$768.55	\$63.41	\$0.00	\$831.96	
<input type="checkbox"/>	:	Quantity	Line Item	Part Number	Unit Price	Discount	Line Item Total
<input type="checkbox"/>	:	1 1.00	Eustolia Gadget	24/7 Couriers 184759...	\$809.00		\$768.55
						Discounted Subtotal	\$768.55
						Tax	\$63.41
						Shipping	0.00
						<b>Grand Total</b>	<b>\$831.96</b>

In addition to the quote's calculated fields, each line item displays a calculated value labeled "Line Item Total". The value of each "Line Item Total" field's value is stored in the database in the Quoted Line Items module as total\_amount and labeled "Calculated Quoted Line Item Amount" by default.



+		Total Discount 1.75% \$40.45		Discounted Subtotal \$2,268.55		Total Tax \$187.16		Shipping \$0.00		Grand Total \$2,455.71	
<input type="checkbox"/>	:	Quantity	Line Item	Part Number	Unit Price		Discount	Line Item Total			
<input type="checkbox"/>	:	1	1.00	Eustolia Gadget	24/7 Couriers 184759...	\$809.00	€566.30	5.00%	\$768.55		
<input type="checkbox"/>	:	2	1.00	Custom Product	n/a	\$1,500.00	€1,050.00	0.00%	\$1,500.00		
									Discounted Subtotal		\$2,268.55
									Tax		\$187.16
									Shipping		\$0.00
									Grand Total		\$2,455.71

Note: The value for a quote's Shipping charge is not a calculated value. It must be manually entered in the lower portion of the quote worksheet and saved via the quote record's Save button. You can click on the field to edit it or you can click the "Edit" button at the top of the record view. To save the value, click the "Save" button at the top of the record view.

## Working With Quotes

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 Quotes section describe Quotes-specific behaviors and functionality.

Content Link	Description
<a href="#">Creating Quotes</a> <a href="#">Basic Record Creation</a> <a href="#">Creating via Quick Create</a> <a href="#">Creating via Subpanels</a> <a href="#">Creating via Duplication</a>	<p>The Creating Records section covers the various methods of creating new quotes, including via the Create button in the Quotes module or from the Quotes subpanel on related opportunity records or related shipping account or billing account records.</p> <p>Note: In contrast with other Sidecar modules in Sugar, when a user creates a quote, they are immediately directed to the quote's full record view and remain on the quote's record view after saving. When creating quotes via duplication, the duplicate-check feature is disabled. For more information on adding line items to quotes, please refer to the Building Quotes section of this page</p>
<a href="#">Viewing Quotes</a>	The Viewing Records section describes

<p>Viewing via List View  Viewing via Record View  Viewing via Recently Viewed  Viewing via Dashlets  Viewing via Activity Streams  Viewing via Reports</p>	<p>the various methods of viewing quote records, including via the Quotes list view and record view, the Recently Viewed menu in the Quotes module tab, list view dashlets showing quote information, and reports displaying quote data.</p>
<p>Searching for Quotes  Global Search  List View Search  Creating a Filter  Saving a Filter</p>	<p>The Searching for Records section provides an introduction to the two searching methods for locating quotes: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Quotes module.</p>
<p>Quotes List View  Total Record Count  Create Button  List View Search  Checkbox Selection  Favorite Designation  Column Reordering  Column Resizing  Column Sorting  Column Selection  Preview  Record Actions Menu  More Quotes  Dashboards</p>	<p>The List View section walks through the Quotes List View layout, which contains a filterable list of all quote 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 Quotes list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.</p>
<p>Quotes Record View  Favorite Designation  Next or Previous Record  Actions Menu  Show More  Subpanels  Related Record Subpanels  Filtering Subpanels  Reordering Subpanels  Dashboards</p>	<p>The Record View section walks through the Quotes Record View layout, which contains detailed information about a single quote record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Quotes record view are described in the</p>
<p>Editing Quotes  Editing Inline via Record View  Editing via Record View  Editing Inline via Subpanels  Editing Inline via List View  Mass Editing via List View</p>	<p>The Editing Records section describes the various methods of editing existing quote records, including inline via the Quotes record view, in full edit mode on the record view, inline via the Quotes subpanel on related module records,</p>



Editing Fields	inline via the Quotes list view, and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.
Deleting Quotes Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted quotes, including via the Quotes record view, an individual record's Actions menu on the Quotes list view, and the Mass Actions menu on the list view.
Emailing Quotes Emailing via Email Address Fields Emailing via List View Emailing via Quick Create Emailing via Emails Module Emailing via Workflows	The Emailing Records section describes the various methods of emailing quote records as recipients, including clicking any email address within Sugar, via the Mass Actions menu on the Quotes list view, via the Quick Create menu, via the Emails module using the Related To field, and via workflows which can automatically send emails according to conditions configured by administrator users.
Exporting Quotes	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of quotes 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 the calculated field values in the module.
Finding Duplicate Quotes	The Finding Duplicate Records section provides instructions for locating duplicate quote records. If searching on matching fields (e.g. Name) identifies one or more duplicates, they can be merged into a single record.
Viewing Quote Historical Summaries	The Viewing Record Historical Summaries section describes the Historical Summary record view option which displays quick details of the quote

	record's related calls, meetings, emails, notes, and tasks.
Viewing Quote Change Logs	The Viewing Record Change Logs section describes the View Change Log record view option which displays a history of changes to the quote's audited fields.
Downloading Quotes as PDFs	The PDF section explains how to download .pdf files of quote information as configured by an administrator via Admin > PDF Manager.
Favoriting Quotes Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking quotes as favorites, including via the Quotes list view, Quotes record view, or any Quotes subpanel appearing on the record view of a related module. Favoriting a quote allows you to easily access it from list views, dashlets, or the Quotes module tab.
Sharing Quotes	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the quote record. If the recipient is logged into Sugar, clicking the link will bring them directly to the quote's record view.

## Quote Menus

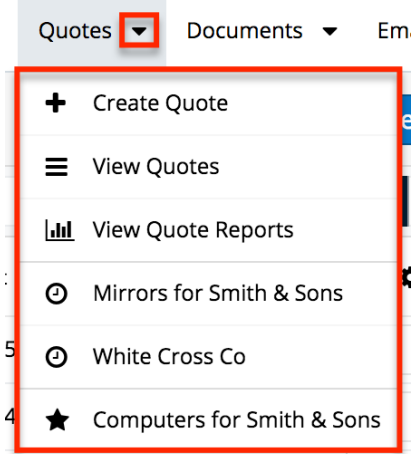
The Quotes module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Quotes-specific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

### Module Tab Menus

The Quotes module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Quotes list view. You may also click the triangle in the Quotes tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu displays options for creating and viewing quotes. The

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Recently Viewed menu displays the list of quotes you last visited. The Favorites menu displays the list of quotes you most recently marked as favorites.



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

Menu Item	Description
Create Quote	Opens the record view layout to create a new quote
View Quotes	Opens the list view layout to search and display quotes
View Quote Reports	Directs you to the Reports list view filtered to display only reports based on the Quotes module

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

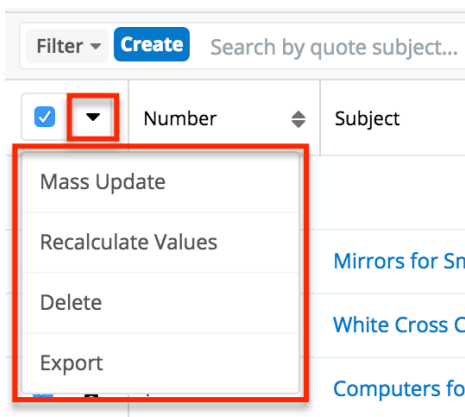
- The Quotes module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Quotes module in the Hide Modules list, simply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

## List View Menus

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

#### List View Mass Actions Menu

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



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

Menu Item	Description
Mass Update	Mass update one or more quotes at a time
Delete	Delete one or more quotes at a time
Export	Export one or more quotes 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 a quote directly from the list view.



<input type="checkbox"/>	Number	Subject	Account Name	Quote Stage	Transaction A		
<input type="checkbox"/>	2	Mirrors for Smi...	Smith & Sons	Negotiation			
<input type="checkbox"/>	3	White Cross Co	White Cross Co	Draft		<div style="border: 1px solid red; padding: 2px;">           Edit            Delete         </div>	
<input type="checkbox"/>	1	Computers for ...	Smith & Sons	Draft			

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

Menu Item	Description
Preview (Eye icon)	Preview this quote in the intelligence pane
Edit	Edit this quote
Delete	Delete this quote

## Record View Actions Menu

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

Computers for Smith ... ★
Not Converted
 Edit

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**Business Card**

Quote Number  
1

Purchase Order Num  
6011842

Payment Terms  
Net 30

Tags

Opportunity Name

Quote Stage  
Draft

Valid Until  
2012-04-30

- Share
- Download PDF
- Email PDF
- Create Opportunity from Quote
- Copy
- Historical Summary
- View Change Log
- Delete

The Actions menu allows you to perform the following operations:

Menu Item	Description

Edit	Edit this quote
Share	Share a link to this quote via email
Download PDF	Download the quote to your computer as a PDF file Note: Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.
Email PDF	Send an email with a PDF copy of the quote as an attachment. Note: Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates. To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Create Opportunity from Quote	Copy the details of this quote to a new opportunity record Note: Quotes that are already "Converted" (as indicated by the badge adjacent to the quote's name in the example pictured here) cannot be re-converted into an opportunity. The "Create Opportunity from Quote" menu option will be grayed out when the quote's badge is Converted.
Copy	Duplicate this quote to create a new quote record. Note: The original quote's line items, groups, comments, and related account and opportunity data will carry over to the new quote.
Historical Summary	View a historical summary of activities (e.g. calls, meetings, etc.) related to this quote
View Change Log	View a record of changes to this quote
Delete	Delete this quote









## Quote Worksheet Options and Menus

Below the quote record, the quote's worksheet contains several options and menus specific to the worksheet, its groups, and rows. In the following image, the blue

section is the Totals bar, which displays the calculated totals for the worksheet; the yellow section contains the column headers for all of the line items that you may add; and the pink section is an example of a group, which can contain any number of quoted line items and comments. The totals for all groups on the worksheet are added to the shipping charge and calculated tax to reach a grand total.

		Total Discount	Discounted Subtotal	Total Tax	Shipping	Grand Total
		5.00% \$115.45	\$2,193.55	\$180.97	\$0.00	\$2,374.52
Quantity	Line Item	Part Number	Unit Price	Discount	Line Item Total	
Use the + create menu to add a line item, comment, or group to this Quote.						
<b>Gadgets</b>						
1	1.00	Eustolia Gadget	24/7 Couriers 184759...	\$809.00	€566.30	5.00% \$768.55
2	1.00	Custom Product	n/a	1,500.00	5.00 %	\$1,425.00
<b>Group Total</b>						<b>\$2,193.55</b>
Discounted Subtotal						<b>\$2,193.55</b>
Tax						<b>\$180.97</b>
Shipping						<b>\$0.00</b>
<b>Grand Total</b>						<b>\$2,374.52</b>

The following table describes the options and menus available on the example quote worksheet pictured above:

	Option	Description
	Create on Worksheet	Add a new group or create ungrouped line items and comments
	Select All	Select or deselect all rows on the worksheet
	Mass Actions	Group or delete all selected rows
	Create in Group	Add a new comment or line item to the group
	Group Actions	Edit the group name or delete the group (does not delete the group's rows)
	Select Row	Select the line item or comment
	Row Actions	Edit or delete the line item or comment
	Row Save/Cancel	Save (□) a new or edited



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	row or cancel (x) creating or editing the row
--	---

## Building Quotes

When creating quotes in Sugar, the full edit view layout opens which includes all of the quote fields in expandable panels labeled "Business Card", "Billing and Shipping", "Quote Settings", and "Show More". Beneath the panels, there is a quote worksheet where product groups and line items can be configured, rearranged, and tallied along with any discounts, taxes, or shipping fees. For more information on the worksheet's layout, please refer to the Quote Worksheet Options and Menus section of this page.

Note: Only the layouts for the panels above the worksheet can be configured by administrators via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

The following sections cover using the quote's worksheet to calculate the quote's grand total.

## Quoted Line Item Groups

The quote's worksheet allows users to add products from the product catalog and arrange them in groups. Groups may also contain comments. Groups are optional for quote records so you can omit them altogether in favor of independent line items or create one or more groups to organize similar products or services together. For example, a quote for software might have a group labeled "Services" to contain the quoted line items for implementation and extended support.

### Creating Groups

Empty groups can be created via the worksheet's Create menu. Alternatively, users can create a group from existing comments and quoted line items. The next two sections explain each method.

#### Creating Empty Groups

Use the following steps to add a new group to the quote's worksheet:

1. After filling in and saving the quote's fields, scroll down to the quote's

worksheet and click on the Create (+) button to access the worksheet's available actions and select "+ Group".

Billing and Shipping						▼
Quote Settings						▼
Show More						▼
<b>+</b>	Total Discount	Discounted Subtotal	Total Tax	Shipping	Grand Total	
	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	
+ Quoted Line Item	Quantity	Line Item	Part Number	Unit Price		
+ Comment	Add a line item, comment, or group to this Quote.					
<b>+ Group</b>						
Discounted Subtotal					\$0.00	
Tax					\$0.00	
Shipping					\$0.00	
<b>Grand Total</b>					<b>\$0.00</b>	

2. Enter an optional name for the new group and then click the Save icon. To create an unnamed group, just click the Save icon without entering any text. **Note:** To cancel without creating a new group, click on the Cancel (x) icon.

<b>+</b>	Total Discount	Discounted Subtotal	Total Tax	Shipping	Grand Total	
	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	
<input type="checkbox"/>	Quantity	Line Item	Part Number	Unit Price		
Use the + create menu to add a line item, comment, or group to this Quote.						
<input checked="" type="checkbox"/>	Licenses					




You now have a new group and can start adding line items to the group.

#### Creating Groups from Quoted Line Items



If a quote already has line items and you want to move some or all of those line items into a new group together, follow these steps to create a new group from the quoted line items:

1. From the quote's worksheet area, identify the quoted line items that you would like to group together and place a checkmark in the empty checkbox next to each item's row.
2. Next, click on the worksheet's Actions button (three vertical dots in the Totals bar) and select "Group Selected".





+		Total Discount	Discounted Subtotal	Total Tax	Shipping	Grand Total
		0.00%	\$0.00	\$0.00	\$0.00	\$1,621.00
<input type="checkbox"/>		Quantity	Line Item	Part Number	Unit Price	
<input type="checkbox"/>			Item			
<input checked="" type="checkbox"/>			Alita Gadget	360 Vacations 422402..		
<input checked="" type="checkbox"/>		2	Daphne Gadget	Spindle Broadcast Co...		

3. Enter an optional name for the new group and then click the Save icon. To create an unnamed group, just click the Save icon without entering any text. Note: To cancel without creating a new group, click on the Cancel (x) icon.





x		<input checked="" type="checkbox"/>	Gadgets
<input type="checkbox"/>		1	Alita Gadget
<input type="checkbox"/>		2	Daphne Gadget

4. The selected items now exist within the new group:

+		Gadgets	
<input type="checkbox"/>		1	Alita Gadget
<input type="checkbox"/>		2	Daphne Gadget

## Editing Groups

To edit a group's name, click on the group's Actions button (three vertical dots to the left of the group name) and then select "Edit".

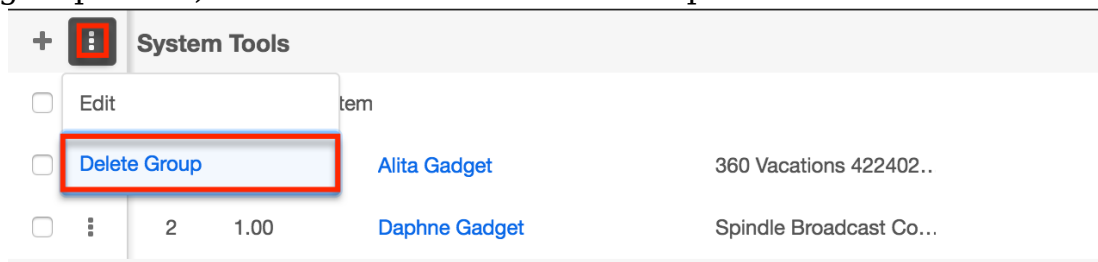
+			System Tools
<input type="checkbox"/>		<input checked="" type="checkbox"/>	Edit
<input type="checkbox"/>		<input type="checkbox"/>	Delete Group
<input type="checkbox"/>		2	Daphne Gadget

To edit the position of quoted line items and comments in a group, you can simply drag and drop the rows to the desired location. Line items and comments can be rearranged within the group, moved to a new group, or moved out of groups to independent lines on the quote worksheet. For more information, please refer to the Moving Quoted Line Items and Moving Comments sections.

## Deleting Groups

When you delete a group from a quote's worksheet, any quoted line items that were in the deleted group will simply become ungrouped on the quote. To delete a

group, click on the group's Actions button (three vertical dots to the left of the group name) and then select "Delete Group".



## Quoted Line Items

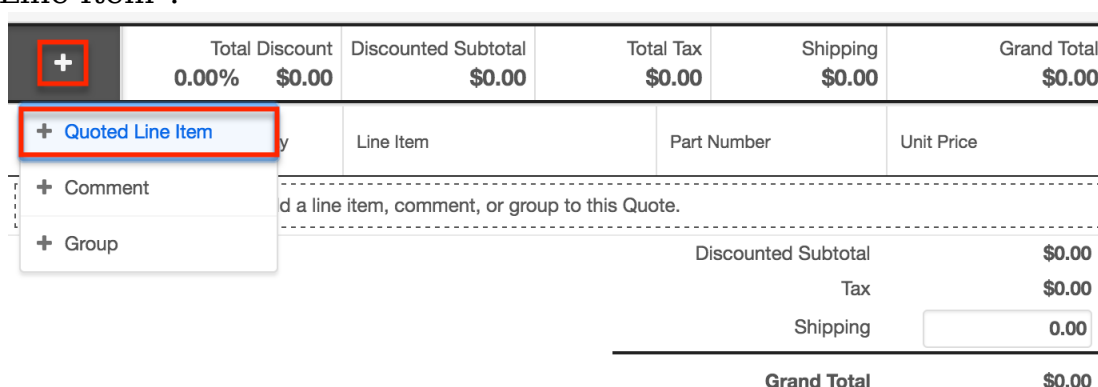
Quoted line items represent the specific products or services on the quote. You can create line items as independent rows on the quote or they may be included in a group, which typically contains additional, related line items. For more information on creating quote groups, please refer to the Adding Groups section of this page.

Note: You can only relate quoted line items with a quote by creating them directly from a quote record's worksheet as described in the following sections. Quoted line items created directly in the Quoted Line Items module via the Actions menu or Create button cannot be linked to a quote record.

### Creating Quoted Line Items

When adding products as quoted line items, you may select a product from your database's Product Catalog directly in the line item or via Product Catalog dashlet or you may manually enter a new product on the fly. Either way, each line item added to a quote will create a new record in the Quoted Line Items module.

To create a line item as an independent row on the quote worksheet, click on the Create (+) button to access the worksheet's available actions and select "+ Quoted Line Item":



To create a line item inside a group on the quote worksheet, click on the group's

Create (+) button to access the group's available actions and select "+ Quoted Line Item":

+		Total Discount	Discounted Subtotal	Total Tax	Shipping	Grand Total
		4.45% \$40.45	\$868.55	\$71.66	\$0.00	\$940.21
☐	:	Quantity	Line Item	Part Number	Unit Price	Di
Use the + create menu to add a line item, comment, or group to this Quote.						
+		Hardware				
+ Quoted Line Item			Eustolia Gadget	24/7 Couriers 184759...		\$809.00
+ Comment			Custom item			\$100.00

Please note that line numbers are only visible next to quoted line items when the "Display Line Numbers" field is enabled in the quote record's Quote Settings panel. This option is enabled by default.

Quote Settings	
Currency	Tax Rate
\$ (USD)	8.25 - Cupertino, CA
Display Line Numbers	<input checked="" type="checkbox"/>

Please refer to the following sections for more information on creating a new custom line item, creating line items via Product Catalog dashlet, and creating line items inline using the product catalog.

#### Creating Custom Quoted Line Items

If you need to add a line item for a product that is not in the Product Catalog, you can instantly create a custom line item directly from the quote worksheet. Custom line items are stored in Sugar as quoted line item records but are not added to the Product Catalog.

Follow these steps to create a custom line item for a quote:

1. Choose "+ Quoted Line Item" from the worksheet's Create (+) menu or from the group's Create (+) menu as desired. For more information, please refer to the Quoted Line Items section of this page.
2. Click on the Line Item dropdown field in the new row and begin typing the product that you would like to use as a line item. When you enter the first letter of a product, Sugar will begin to display recommendations from the Product Catalog that begin with the same letter. To ignore the

recommendations and create an entirely new product, completely type out the name of the product as you would like it to appear on the quote and then click on the New Quoted Line Item menu option or press the Enter key.

<input type="checkbox"/>	:	Quantity	Line Item	Part Number	Unit Price	Disco
<input type="checkbox"/>	:	1	1.00	Eustolia Gadget	24/7 Couriers 184759...	\$809.00
<input checked="" type="checkbox"/>	✓	2	1.00	Required	0.00	
					Discounted Subtotal	\$768.55
					Tax	\$63.41
					Shipping	\$0.00
					<b>Grand Total</b>	<b>\$831.96</b>

3. Enter the quantity, unit price, and remaining line item fields as needed. For more information, please refer to the Quoted Line Items documentation.
4. Click the blue checkmark next to the row to save the line item.

<input type="checkbox"/>	:	1	1.00	Eustolia Gadget	24/7 Couriers 184759...	\$809.00	5.00%
<input checked="" type="checkbox"/>	✓	2	1.00	Custom item	1234567	100.00	0.00 % \$100.00

This will save the row to Sugar's database as a quoted line item record but will not affect the Product Catalog. After adding a quoted line item to a quote, you can navigate to the quoted line item's record view by clicking its hyperlinked name on the quote worksheet. For more information on quoted line item records, please refer to the Quoted Line Items documentation.

#### Creating Quoted Line Items via Product Catalog Dashlet

If you need to add a line item for a product that is in the Product Catalog, you can easily find and select the product directly from the Product Catalog dashlet, which is located next to the quote form when creating a new quote and also on the Quotes Record Dashboard from a quote's record view. For more information on searching for products and interacting with the dashlet, please refer to the Product Catalog Dashlet section of this page.

**Note:** A system administrator or user with developer access to the Quoted Line Items module must create and add products via Admin > Product Catalog before users can select products when adding line items. For more information on adding and modifying products in the product catalog, please refer to the Product and Quotes documentation. When you select an item from the Product Catalog dashlet, the line item's tax class, cost, and manufacturer information will be pre-filled by values set by your administrator and therefore cannot be edited.

Follow these steps to add a quoted line item to the quote worksheet using the Product Catalog dashlet:

1. Create a new quote record via any of the various creation methods explained in the User Interface documentation. For this example, we will select "Create Quote" from the Quote module's tab menu.

Note: To view and use the Product Catalog dashlet with existing quote records, simply expand the quote's record-view dashboard (if needed) by clicking on the double-arrow icon next to the record's Edit button and then select the Quotes Record Dashboard or any other dashboard that has been configured to display the Product Catalog dashlet.

2. On the create screen, enter the general quote information in the form's fields
3. When completing the form fields, the Product Catalog dashlet will be displayed to the right of the quote form. When you are ready to create a new quoted line item, click on any product name in the dashlet to instantly add it as an editable line item to the quote's worksheet. The line item's fields will instantly populate with the part number and unit price, which are copied from the Product Catalog. For more information on searching for and adding products as line items, please refer to the Product Catalog Dashlet section of this page.

Note: The Part Number field cannot be edited for line items created via Product Catalog.

Quantity	Line Item	Part Number	Unit Price	Discount	Line Item Total
1	Camie Gadget	AtoZ Co Ltd 120124XY	746.00	0.00 %	\$746.00

4. Modify the quantity field if the default value of "1" is not correct. Please note



that users may enter line items with a quantity of zero to denote optional products, previously-paid items, or to handle other situations. Rows with zero quantity will not affect the value of the quote.

- Optionally, apply a discount to the line item. By default, the discount field accepts a percentage value, but users can enter an absolute discount amount by toggling the Unit button from "%" to the currency symbol.

<input type="checkbox"/>	:	Quantity	Line Item	Part Number	Unit Price	Discount	Line Item Total	
<input type="checkbox"/>	:	1	Eustolia Gadget	24/7 Couriers 184759...	\$809.00	€566.30	5.00%	\$768.4
<input checked="" type="checkbox"/>	✓	2	Deonna Gadget	South Sea Plumbing Pl	€571.20	0.00 %	\$816.00	
Discounted Subtotal							\$ US Dollars	
Tax							% Percent	
Shipping								
Grand Total							\$1,715.28	

- After completing the line item, click the blue checkmark next to the row to save the line item.

This will save the row to Sugar's database as a new quoted line item record.

#### Creating Quoted Line Items Inline via Product Catalog

If you need to add a line item for a product that is in the Product Catalog, you can easily select the product directly from the line item on the quote worksheet. When you select an item from the Product Catalog, you cannot modify the line item's tax class, cost, or manufacturer information because the values have been determined by your administrator.

**Note:** A system administrator or user with developer access to the Quoted Line Items module must create and add products via Admin > Product Catalog before users can select products when adding line items. For more information on adding and modifying products in the product catalog, please refer to the Product and Quotes documentation.

Follow these steps to pull a product from the product catalog into the quoted line item:

- Choose "+ Quoted Line Item" from the worksheet's Create (+) menu or from the group's Create (+) menu as explained in the Creating Quoted Line Items section of this page.
- Click on the Line Item dropdown field in the new row and begin typing the product that you would like to use as a line item. When you enter the first letter of a product, Sugar will begin to display recommendations from the Product Catalog that begin with the same letter. Click on the product name when it appears. Alternatively, click on "Search and Select" to find the

product by its name, category, or type.

- The line item's fields will instantly populate with the part number and unit price, which are copied from the Product Catalog.

Note: The Part Number field is grayed out and cannot be edited.

<input type="checkbox"/>	<input type="checkbox"/>	Quantity	Line Item	Part Number	Unit Price	Discount	Line Item Total
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	Camie Gadget <input checked="" type="checkbox"/>	AtoZ Co Ltd 120124XY	746.00	0.00 %	\$746.00

- Modify the quantity field if the default value of "1" is not correct. Please note that users may enter line items with a quantity of zero to denote optional products, previously-paid items, or to handle other situations. Rows with zero quantity will not affect the value of the quote.
- Optionally, apply a discount to the line item. By default, the discount field accepts a percentage value, but users can enter an absolute discount amount by toggling the Unit button from "%" to the currency symbol.

<input type="checkbox"/>	<input type="checkbox"/>	Quantity	Line Item	Part Number	Unit Price	Discount	Line Item Total	
<input type="checkbox"/>	<input type="checkbox"/>	1	Eustolia Gadget	24/7 Couriers 184759...	\$809.00	€566.30	5.00%	\$768.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	Deonna Gadget <input checked="" type="checkbox"/>	South Sea Plumbing Pl	€571.20	0.00 %	\$816.00	
						Discounted Subtotal	\$ US Dollars	
						Tax	% Percent	
						Shipping		
<b>Grand Total</b>							<b>\$1,715.28</b>	

- After completing the line item, click the blue checkmark next to the row to save the line item.

This will save the row to Sugar's database as a new quoted line item record.

### Editing Quoted Line Items

To change the editable values of a quoted line item, click on the row's Actions button (three vertical dots to the left of the line item) and then select "Edit".

<input type="checkbox"/>	<input type="checkbox"/>	Gadgets					
<input type="checkbox"/>	<input type="checkbox"/>	Ship before April 1:					
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1	1.00	Custom Product	n/a	\$1,500.00	€1,050.00
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Edit					
<input type="checkbox"/>	<input type="checkbox"/>	Delete					
<input type="checkbox"/>	<input type="checkbox"/>			Eustolia Gadget	24/7 Couriers 184759...	\$809.00	€566.30

Custom line items are fully editable. The quantity and discount are editable for line items from the product catalog, or you may change the selected product, which will reset the row's values appropriately. After updating the quoted line item, click the blue checkmark to apply the changes or click the Cancel (x) icon to cancel any changes and revert the row's values. If the line item's value has changed, the

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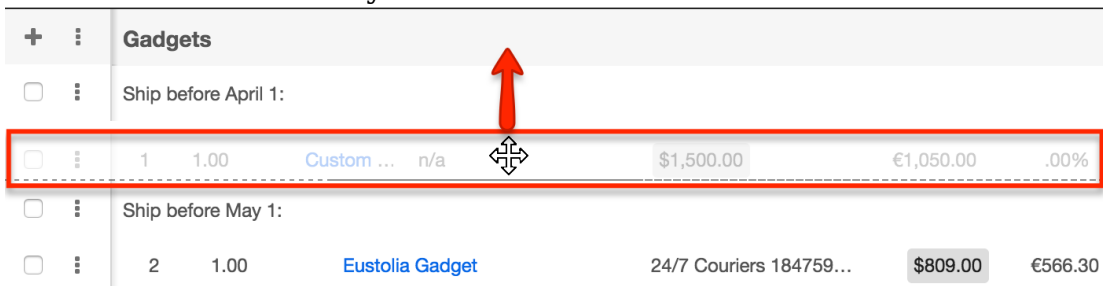
quote's totals will automatically recalculate. If the edited line item is in a group, then the group's totals will recalculate, as well.

## Moving Quoted Line Items

Users can move quoted line items to a new position on a worksheet. Simply save the row and then click and hold anywhere on the line item until the mouse tip changes to a four-directional arrow. Drag the row to the preferred position on the worksheet and then release the mouse button.

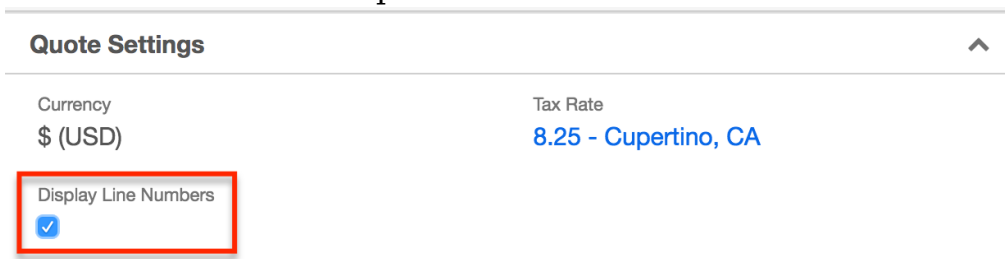
Note: Quoted line items cannot be moved when they are in edit mode.

Line items can be moved within a group, from one group to another group, or out of a group to an independent row. When you change the position of a line item, its line number will adjust accordingly and so will the line numbers for any other rows affected by the change. Upon moving line items into or out of a group, the group's totals will automatically recalculate.



Gadgets							
<input type="checkbox"/>	:	Ship before April 1:					
<input type="checkbox"/>	:	1	1.00	Custom ...	n/a	\$1,500.00	€1,050.00 .00%
<input type="checkbox"/>	:	Ship before May 1:					
<input type="checkbox"/>	:	2	1.00	Eustolia Gadget	24/7 Couriers 184759...	\$809.00	€566.30

Please note that line numbers are only visible when the "Display Line Numbers" field is enabled on the quote record.



Quote Settings	
Currency	Tax Rate
\$ (USD)	8.25 - Cupertino, CA
<input checked="" type="checkbox"/> Display Line Numbers	

Moving a quoted line item into or out of a group is audited by the quoted line item record's activity stream, but changing the position of a line item within a single group is not tracked.

## Deleting Quoted Line Items

If you delete a line item from a quote's worksheet, you cannot get it back. You will delete the record from the Quoted Line Items module. The quote worksheet allows you to delete a single quoted line item or to use a mass action for deleting several

line items at once. Upon deleting line items, the quote's totals will recalculate automatically. If the deleted line items were in a group, the group totals will recalculate, too.

To delete a single quoted line item, click on the line item row's Actions button (three vertical dots to the left of the line item's name) and then select "Delete".

+ ⋮		Hardware				
<input type="checkbox"/>	⋮	1	1.00	Eustolia Gadget	24/7 Couriers 184759...	\$809.00
<input type="checkbox"/>	⋮	2	1.00	Custom item		\$100.00
<div style="border: 1px solid gray; padding: 2px;">           Edit           <div style="border: 2px solid red; padding: 2px; margin-top: 5px;">Delete</div> </div>						
Discounted Subtotal						\$868.55
Tax						\$71.66
Shipping						\$0.00
Grand Total						\$940.21

To delete multiple line items at once, identify the quoted line items that you would like to delete and place a checkmark in the empty checkbox next to each item's row. Click on the worksheet's Actions button (three vertical dots in the Totals bar) and select "Delete Selected".

+ ⋮		Total Discount	Discounted Subtotal	Total Tax	Shipping	Grand Total
		4.45% \$40.45	\$868.55	\$71.66	\$0.00	\$940.21
<input type="checkbox"/>	⋮	Quantity	Line Item	Part Number	Unit Price	
<div style="border: 1px dashed gray; padding: 5px;">           Use Group Selected to move the item, comment, or group to this Quote.           <div style="border: 2px solid red; padding: 2px; margin-top: 5px;">Delete Selected</div> </div>						
<input checked="" type="checkbox"/>	⋮	1	1.00	Eustolia Gadget	24/7 Couriers 184759...	\$809.00
<input checked="" type="checkbox"/>	⋮	2	1.00	Custom item		\$100.00

## Comments

Comments are user-created notes on the quote worksheet. Comments are included on the default quote PDF templates. You can create comments as independent rows on the quote or they may be included in a group. For more information on creating quote groups, please refer to the Adding Groups section of this page. Because comments, like quoted line items, occupy rows on the worksheet, they can be added, edited, moved, and deleted from the sheet in the same way as quoted line items.

### Creating Comments

To create a comment as an independent row on the quote worksheet, click on the Create (+) button to access the worksheet's available actions and select "+

Comment":

<b>+</b>	Total Discount 0.00% €0.00	Discounted Subtotal €0.00	Total Tax €0.00	Shipping €0.00	Grand Total €0.00
<b>+</b> Quoted Line Item	Quantity	Line Item	Part Number	Unit Price	
<b>+</b> Comment	Add a line item, comment, or group to this Quote.				
<b>+</b> Group					
				Discounted Subtotal	€0.00
				Tax	€0.00
				Shipping	0.00
<b>Grand Total</b>					<b>€0.00</b>

To create a comment inside a group on the quote worksheet, click on the group's Create (+) button to access the group's available actions and select "+ Comment":

<b>+</b>	Total Discount 5.00% \$115.45	Discounted Subtotal \$2,193.55	Total Tax \$180.97	Shipping \$0.00	Grand Total \$2,374.52
<input type="checkbox"/> ⋮	Quantity	Line Item	Part Number	Unit Price	
Use the + create menu to add a line item, comment, or group to this Quote.					
<b>+</b> ⋮	<b>Gadgets</b>				
<b>+</b> Quoted Line Item		Custom Product	n/a	\$1,500.00	€1,050.00
<b>+</b> Comment		Eustolia Gadget	24/7 Couriers 184759...	\$809.00	€566.30

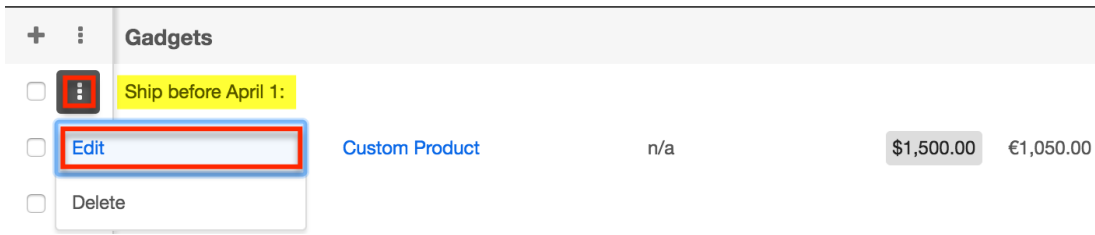
Type the comment into the text box and then click the blue checkmark to save the comment as a new row or click the Cancel (x) icon to remove the comment's row:

<b>+</b> ⋮	<b>Gadgets</b>				
<input type="checkbox"/> ⋮	Ship before April 1:				
<input type="checkbox"/> ⋮	1	1.00	Custom Product	n/a	\$1,500.00 €1,050.00 5.00% \$1,425.00
<input checked="" type="checkbox"/> <b>+</b>	Ship before May 1:				
<input type="checkbox"/> ⋮	2	1.00	Eustolia Gadget	24/7 Couriers 184759X...	\$809.00 €566.30 5.00% \$768.55

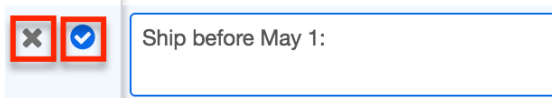
### Editing Comments

To edit a comment's text, click on the comment row's Actions button (three vertical dots to the left of the comment) and then select "Edit".



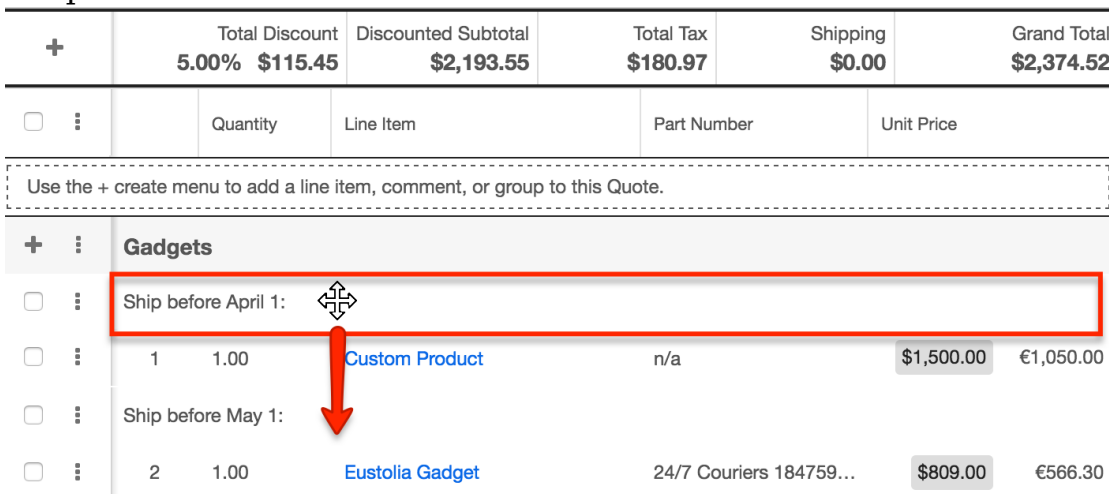


After updating the comment, click the blue checkmark to preserve the changes or click the Cancel (x) icon to cancel any changes and revert the text.



### Moving Comments

Users can move comments to a new position on a worksheet. Simply save the comment and then click and hold anywhere on the comment row until the mouse tip changes to a four-directional arrow. Drag the comment to the preferred position on the worksheet and then release the mouse button. Comments can be moved within a group, from one group to another group, or out of a group to an independent row.



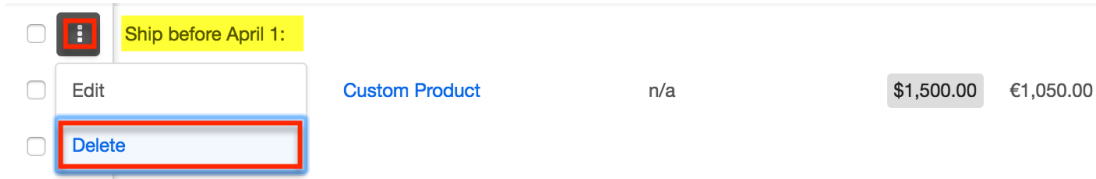
Note: Comments cannot be moved when they are in edit mode.

### Deleting Comments

To delete a comment from the quote worksheet, click on the comment row's Actions button (three vertical dots to the left of the comment) and then select "Delete".

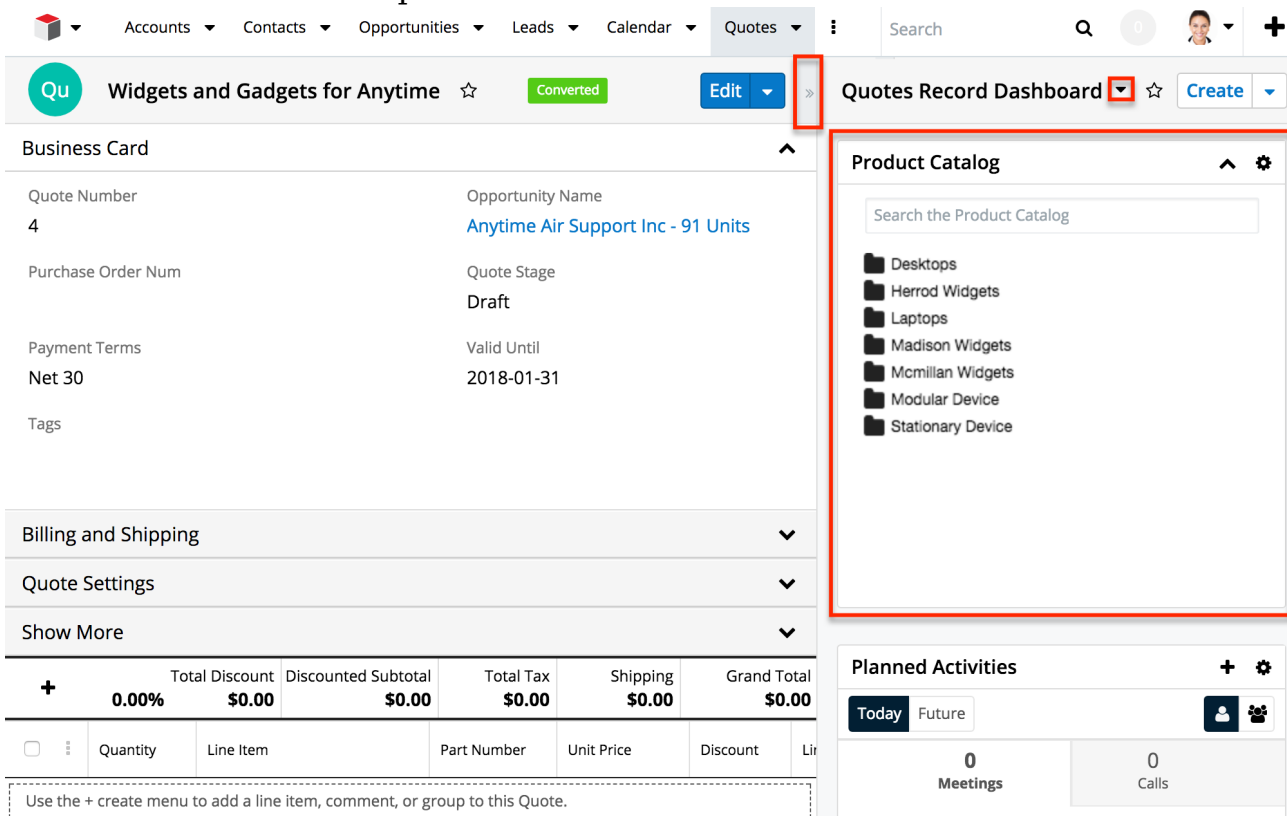






## Product Catalog Dashlet

The Product Catalog dashlet provides users with a simple way to access the Product Catalog directly from the quote record and instantly add products from the catalog as line items on the quote worksheet. The Product Catalog dashlet is located next to the quote form when creating a new quote and also on the Quotes Record Dashboard on a quote's record view.



The following sections explain the various features and components of the Product Catalog dashlet. For detailed steps on creating quoted line items via the Product Catalog dashlet, please refer to the Creating Quoted Line Items via Product Catalog Dashlet section of this page.

Note: A system administrator or user with developer access to the Quoted Line Items module must create and add products via Admin > Product Catalog before users can select products when adding line items. For more information on adding and modifying products in the product catalog, please refer to the Product and Quotes documentation. When you select an item from the Product Catalog dashlet,

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the line item's tax class, cost, and manufacturer information will be pre-filled by values set by your administrator and therefore cannot be edited.

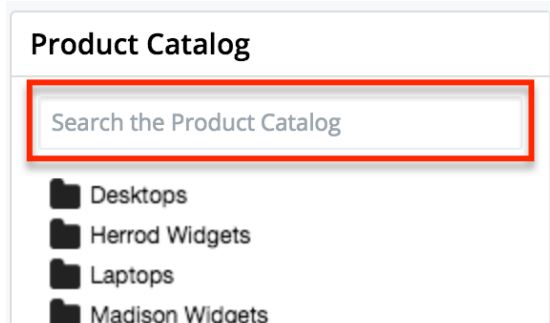
### Viewing Products and Categories via Dashlet

In the Product Catalog dashlet, product categories are represented as folders and are organized to reflect the structure of the customer's category hierarchy. Users can search for products and categories and click on individual folders to reveal the products contained in each category. To close an expanded category folder, click on the open-folder icon.

Simply click on a product name to instantly add the product to the quote worksheet. The new line item will be pre-populated with values specific to the product and can be edited for quantity, discount, or unit price prior to saving. For more information, please refer to the Creating Quoted Line Items via Product Catalog Dashlet section of this page.

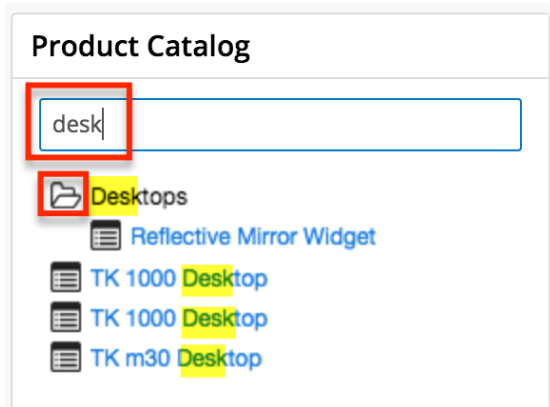
### Searching for Products and Categories via Dashlet

Users can also search for products using the Search field on the Product Catalog dashlet.



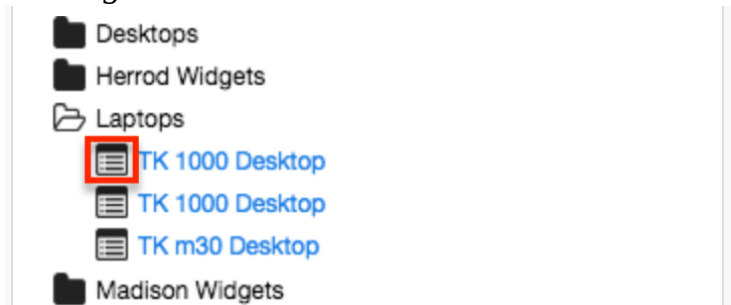
Upon entering a search term, a list of matching product categories and matching products will be shown in the dashlet. If the user clicks on a category (e.g. a folder) in the list of search results, all products in the category are loaded, not only the products that match the search terms.





### Previewing Products via Dashlet

Click on the icon next to a product name to view the complete details of its Product Catalog record:



After clicking the icon, the record's detail view opens. Click the "Add" button to add it to the quote as a quoted line item. To close the Product Catalog record's details without adding the product as a line item, click the "Cancel" button.



PC TK 1000 Desktop Cancel Add

Availability In Stock	Product URL
Date Available 2009-10-15	Tax Class Taxable
Quantity in Stock 72	Category Name Laptops
Manufacturer Name TekWare Inc.	Part Number XYZ789012222
Vendor Part Number	Weight 20.00
Type Devices	Cost \$500.00
Cost USD \$500.00	Date-Cost-Price
Unit Price \$800.00	Discount Price USD \$800.00
List Price \$800.00	List USD \$800.00
Default Pricing Formula Same as List	

Quote Subject Required ^

SUGARCRM Mobile Shortcuts Feedback Help

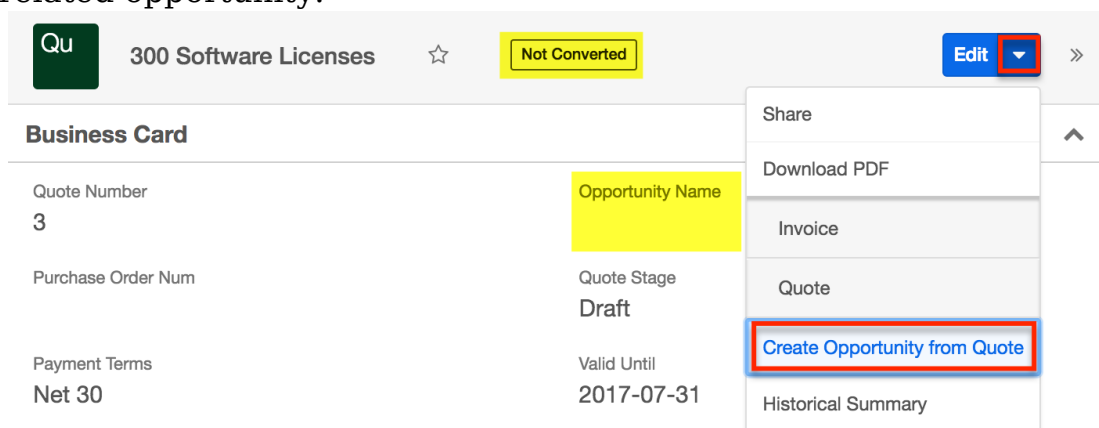
## Creating Opportunities from Quotes

Opportunity records in Sugar represent prospective sales. As you interact with your client and present the quote for your products and services, you can create an opportunity from the quote's detail view to track the quote's progression through your organization's sales stages. The new opportunity is populated with the original quote's values to reflect the opportunity name, account name, expected close date, best, likely, and worst amounts. Any other populated fields will be based on the default values as they are defined in Studio for the Opportunities module. On save, the new opportunity record will automatically be related to the quote record in Sugar, and the quote record will show that it has been converted.

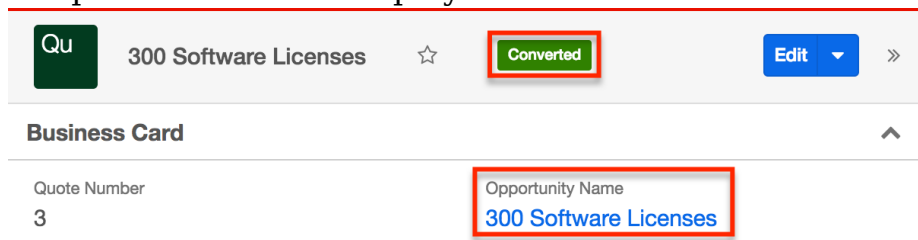
Note: For instances using revenue line items, each quoted line item on the quote

will become a revenue line item related to the newly created opportunity record.

To create an opportunity from a quote, navigate to a quote's record view. Select "Create Opportunity from Quote" from the Actions menu. If the option is grayed out in the menu, confirm that the quote's Opportunity Name field is empty and that the quote record is labeled "Not Converted". Quotes that already relate to an opportunity are considered converted and cannot be converted into another related opportunity.



Sugar will instantly create and save a new, related opportunity and redirect you to the opportunity's record view. You may update the opportunity if needed by clicking "Edit" and then saving the changes. The opportunity's Quotes subpanel will display the originating quote record. Click on the quote's name and the quote will now display the related opportunity's name in the Opportunity Name field and the quote's label will display "Converted".



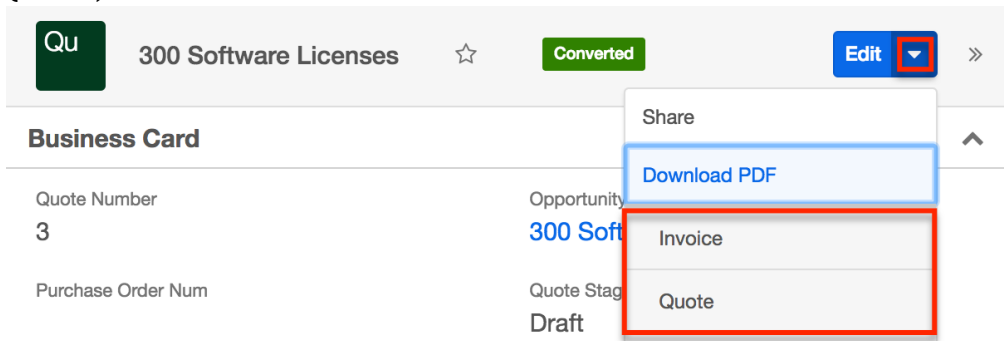
## Downloading Quotes as PDFs

Users can download Sugar quote records in PDF format via the quote's Actions menu or from any Quotes subpanel on a related record. By default, the quote can be formatted as either a quote or an invoice, but administrators may create new quote PDF templates or modify the default templates via Admin > PDF Manager. For more information, please refer to the PDF Manager documentation in the Administration Guide.

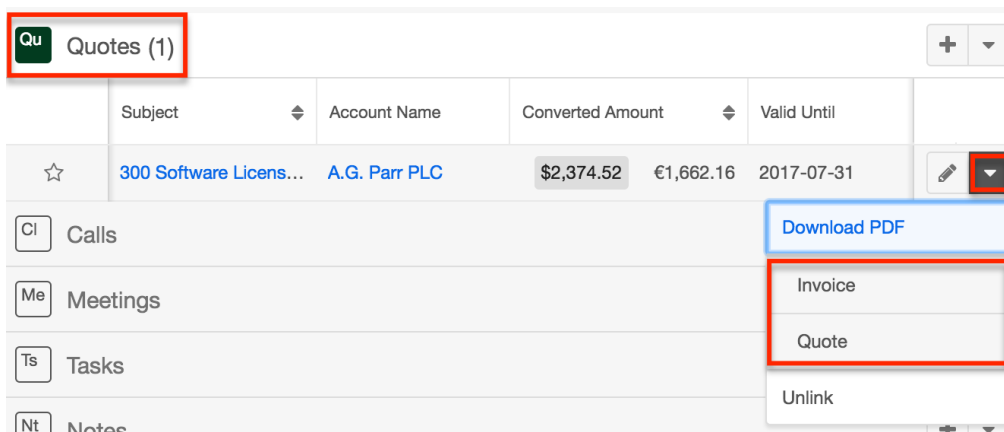
The Download PDF option enables you to easily download the quote to your machine and email or print and mail it to your client outside of the Sugar application. The default PDF formats list the details (e.g. quantity, product name,

etc.) of the items or services for purchase as well as any comments and pricing information. Once the client approves the quote's terms and agrees to purchase your product or service, you can generate an invoice for payment.

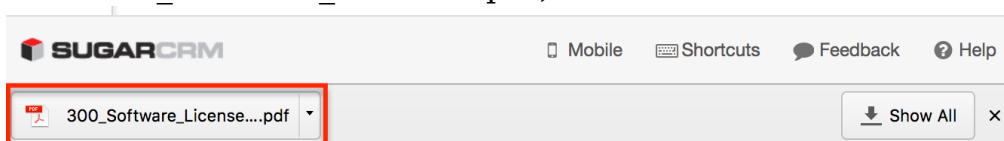
To download a PDF from the quote's record view, find the Download PDF option in the quote record's Actions menu and the available PDF formats will be listed in the subsequent rows. If the PDF options are hidden, simply click on "Download PDF" to expand the PDF options. Click on the PDF format that you prefer (e.g. Invoice or Quote).



To download a PDF from a related record's Quotes subpanel, expand the Actions menu for the quote record in the subpanel and find the Download PDF option. The available PDF formats will be listed in the subsequent rows. If the PDF options are hidden, simply click on "Download PDF" to expand the PDF options. Click on the PDF format that you prefer (e.g. Invoice or Quote).




After downloading the file, locate the PDF in your browser's footer or in your computer's Downloads folder. It will be named Quote\_Name.pdf where Quote\_Name is the name of the quote record with underscores in place of space characters (e.g. a quote named "300 Software Licenses" will export with the file name 300\_Software\_Licenses.pdf).





The .pdf document will contain all of the information from the quote's worksheet as well as the quote number, assigned user's name, and billing and shipping information.

		10050 N Wolfe Rd. SW2-130 Cupertino, CA 95014	<b>Quote</b> Quote number: 3 Sales Person: Administrator Valid until: 2017-07-31
---	--	---	---

<b>Bill To</b>	<b>Ship To</b>
A.G. Parr PLC 1715 Scott Dr Santa Monica, CA, 35211 USA	A.G. Parr PLC 1715 Scott Dr Santa Monica, CA, 35211 USA

**Gadgets**

Quantity	Part Number	Quoted Line Item	List Price	Unit Price	Ext. Price	Discount:
1.00	n/a	Ship before April 1: Custom Product	\$0.00	\$1,500.00	\$1,500.00	5.00%
1.00	24/7 Couriers 184759XYZ987	Ship before May 1: Eustolia Gadget js	\$990.00	\$809.00	\$809.00	5.00%

	Subtotal:	\$2,309.00
	Discount:	\$115.45
	Discounted	\$2,193.55
	Subtotal:	\$2,193.55
	Total	\$2,193.55

## Currencies and Quotes

Sugar allows your organization to perform business around the world by supporting multiple currencies. Administrators must first add desired currencies and exchange rates to Sugar via Admin > Currencies. They also have the ability to set the instance's default currency via Admin > Locale. This is typically the currency of the country where the majority of business is conducted. For more information, please refer to the System documentation in the Administration Guide.

Each quote record has a Currency field where you will specify the currency being used for this particular business transaction. However, line items built from product catalog items will use the product catalog item's selected currency rather than the quote's currency.

There are two situations where the displayed values are in a currency that differs from the line item's currency. In both cases, fields with a "Yes" in the last column of the following chart will display the transactional amount, in the currency of the line item, in a grey box next to the converted amount. The two situations are as follows:

- The user viewing the quote has configured their profiles so that:
  - Their preferred currency differs from the line item's currency.
  - Their "Show Preferred Currency" option is enabled.
- The instance's default currency, specified in Admin > Locale, differs from the line item's currency.

The currencies used and displayed for each amount field of a quote are as follows:

Quote Area	Transactional Currency	Fields	Converted Currency Displayed
Line item based on product catalog	Product catalog item's selected currency	Unit Price Discount	Yes
		Line Item Total	No
Line item manually entered	Quote's selected currency	Unit Price Discount	Yes
		Line Item Total	No
Line item totals	Quote's selected currency	Line Item Total	No
Group and grand totals	Quote's selected currency	Group Total Discounted Subtotal Tax Shipping Grand Total	No

In the following example, the quote's selected currency is pounds ( £ ) while the system default currency is U.S dollars ( \$ ). The first line item was created from a product catalog item, so its transactional values use the catalog item's currency, dollars. The second line item was manually entered, so its transactional values are in pounds. Because the second line item's transactional currency differs from the system default currency, it shows the transactional values in grey boxes. The same behavior would occur if the user's preferred currency differed from the transactional currency, and the user had enabled "Show Preferred Currency".



+		Total Discount 1.64% £10.00	Discounted Subtotal £600.90	Total Tax £0.00	Shipping £0.00		
<input type="checkbox"/>	:	Quantity	Line Item	Part Number	Unit Price	Discount	Line Item Total
<input type="checkbox"/>	:	1	1.00	Angella Gadget	Powell Funding 27558..	\$655.00	0.00%
<input type="checkbox"/>	:	2	1.00	Manually Entered Item		£100.00	\$128.21
						£10.00	\$12.82
						Discounted Subtotal	
						Tax	
						Shipping	
						<b>Grand Total</b>	

For more information about converted currency amounts, please refer to the Updating Currency Rates section of this page. For more information about user preferred currencies, please refer to the Getting Started documentation. For more information on creating and managing the Product Catalog, refer to the Products and Quotes documentation in the Administration Guide.

### Transaction Amount vs Converted Amount

The stock Quotes list view contains two fields, Transaction Amount and Converted Amount, that differ in functionality. When the viewing user's Show Preferred Currency option is selected in their user profile, the Converted Amount field will be displayed in the user's preferred currency. When it is unchecked, the Converted Amount field will be displayed in the system default currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the Getting Started documentation.

The primary differences between these fields and options are as follows:

Field Name	Value Displayed	Method to Update Value
Transaction Amount	Transactional amount; the currency and value in which the quote was last saved	Updated by editing the quote record
Converted Amount (system default currency)	Transaction Amount converted to the system default currency based on the system-defined conversion rate	Updated by a scheduled process when the relevant exchange rate is modified via Admin > Currencies. For more information on how currency changes affect the Converted Amount value please see Updating Currency Rates

Converted Amount (user's preferred currency)	Transaction Amount converted to the viewing user's preferred currency as specified in their user profile based on the system-defined conversion rate	Updated by modifying the relevant exchange rate via Admin > Currencies. For more information on how currency changes affect the Converted Amount value please see Updating Currency Rates
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## Updating Currency Rates

When saving a quote in a currency that differs from the system-defined default currency, Sugar will store the conversion rate for that currency at the record level. This conversion rate is used to calculate the converted amounts when the quote's currency differs from the system default currency. To keep amounts historically accurate, the conversion rate will only update on a quote provided the quote stage is not set to "Closed Accepted", "Closed Lost", or "Closed Dead". If the quote is in any other stage, the conversion rate will update under the following scenarios:

- The quote undergoes a save event (e.g. mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved in the quote.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all quotes saved with that currency to the new rate.

When the viewing user's profile has the Show Preferred Currency option selected, the Converted Amount field displays the Transactional Amount in the user's preferred currency. In this case, the conversion rate used to calculate the Converted Amount's value is drawn directly from the conversion rate at the system level rather than any conversion rate stored on the record. This means that the value will always use the current conversion rate regardless of the opportunity's sales stage. For this reason, the Converted Amount field should not be considered historically accurate for closed quotes when it is using the user's preferred currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the Getting Started documentation.

For more information about currency exchange rates, please refer to the System documentation in the Administration guide.

## Filtering on Currency Fields

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Amount fields are filtered according to the record's set currency rather than being standardized to the user's preferred or system default currency. In the list view, filtering quotes by a currency field allows you to specify the filter's currency. Only records matching both the chosen currency and amount range will be returned. For example, if you filter based on a Total value of 500 in US Dollars, then the search result will return a quote with a Total value of \$500 but will exclude values of €500 or other currency values which are equivalent to \$500.

The screenshot shows the 'Quotes (1)' interface. At the top right is a 'Create' button. Below it is a search bar with 'Filter' and 'Create' options, and a search input field. A filter is applied: 'Total' is set to 'is equal to' '\$ (USD) 500.00'. Below the filter is a 'Save' button. The table below has columns: Number, Subject, Account Name, Quote Stage, Transaction Amount, and Convert. The first row shows: 3, R R Talker July, NW Capital Corp, Draft, \$500.00.

When filtering in reports, you will only specify the amount range, and any record matching that amount, regardless of the record's currency, will be returned. For example, if one quote's Total value is \$500 in US Dollars and another's is €500 in Euros, a report filtering for a Total value of exactly 500 will return both records.

Last Modified: 2018-01-25 19:00:52

## Quoted Line Items

### Overview

Sugar's Quoted Line Items module consists of the individual line items which make up your organization's sales quotes. These line items are all of the products that have already been sold or are in the process of being sold to clients along with a quantity, price, and potential discounts. Since a quote is made up of one or more quoted line items, you will most often create quoted line items while creating the quote itself. You can view the quoted line item's details in record view by clicking the line item in a quote or by navigating to it directly via the Quoted Line Items module if your administrator has enabled the module to appear in Sugar's navigation bar. For more information about how quotes and quoted line items interact, please refer to the Quotes and Quoted Line Items section of this page.

Each quoted line item will include a product that is being sold. The product can be selected from the product catalog or can be typed in manually. For more information, please refer to the Products and Quoted Line Items section of this page.

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This documentation will cover information and actions specific to the Quoted Line Items module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting line items, please refer to the Working With Quoted Line Items section of this page.

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

## Quoted Line Item Fields

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

Field	Description
Account Name	The account related to the quoted line item's quote
Assigned To	The Sugar user assigned to the quoted line item record
Calculated Quoted Line Item Amount	Displayed on the quoted line item's related quote worksheet, the Total Line Amount after any discount is applied
Contact Name	The contact related to the quoted line item's quote
Cost <sup>1, 2</sup>	The actual cost of the quoted line item's product
Date Created	The date the quoted line item record was first saved
Date Modified	The date the quoted line item record was last modified
Description	A description or other information about the quoted line item
Discount Amount	The quoted line item's discount amount
Discount Amount (Unit)	Unit (e.g. USD or percentage) applied to the Discount Amount

List Price <sup>1, 2</sup>	The quoted list price of the product
Name	The product's name as selected from the product catalog list or manually entered as new
Part Number <sup>1</sup>	The manufacturer's part number for the quoted line item's product
Product Template	The product catalog record, if any, related to the quoted line item
Quantity	The number of products being purchased
Quote Name	The quote to which the quoted line item relates Note: Quoted line items will only be related to quotes when they are created from the quote's worksheet.
Status	The current status of the quoted line item
Subtotal	The list price multiplied by the line item's quantity before any discount is applied
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports Note: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the quoted line item record
Unit Price <sup>2</sup>	The unit price of the product

1. When a quoted line item is related to a product catalog record, this value automatically populates from the related product and cannot be modified on the quoted line item record. For more information on creating and managing records in the Product Catalog, please refer to the Products and Quotes documentation in the Administration Guide.
2. The displayed currency is based on the locale settings configured in the logged-in user's User Preferences. If the user has enabled "Show Preferred Currency" in their preferences, then Sugar will display the value in their preferred currency. If the user has disabled "Show Preferred Currency" in their preferences, then Sugar will display the value in the system's default currency as configured by the Administrator. If the quoted line item was last



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saved using a currency that differs from the displayed currency, Sugar will show the alternative currency's value in a gray box adjacent to the user's preferred currency. For more information, please refer to the Updating Currency Rates section of this page.

In addition to the fields listed above, quoted line items that are related to a product catalog record inherit the following field values from the product:

- Asset Number
- Book Value
- Book Value Date
- Pricing Formula
- Product URL
- Serial Number
- Support Contact
- Support Description
- Support Expires
- Support Starts
- Support Term
- Support Title
- Tax Class
- Vendor Part Number
- Weight

For more information on Product Catalog fields, please refer to the Products and Quotes documentation.

## Working With Quoted Line Items

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 Quoted Line Items section describe Quoted Line Items-specific behaviors and functionality.

Content Link	Description
<a href="#">Creating Quoted Line Items</a> <a href="#">Basic Quoted Line Item Creation</a>	<p>The most common way to create quoted line items in Sugar is via the quote worksheet under a quote record, which is covered in detail in the Quotes documentation.</p> <p>The links to the left will take you to the User Interface documentation, which</p>

	<p>covers how to create new records via the Create button in the Quoted Line Items module. Please note that creating quoted line items from any location outside of the quote worksheet will prevent you from relating the line item to a quote in Sugar.</p>
<p>Viewing Quoted Line Items  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</p>	<p>The most common place to view quoted line items in Sugar is via the quote worksheet under a quote record, which is covered in detail in the Quotes documentation.</p> <p>The links to the left will take you to the User Interface documentation, which covers viewing quoted line item records via the Quoted Line Items list view and record view, the Recently Viewed menu in the Quoted Line Items module tab, list view dashlets showing quoted line item information, activity stream entries concerning quoted line item updates or where a user mentions a quoted line item, previewing quoted line items in the right-hand side panel, and reports displaying quoted line item data.</p>
<p>Searching for Quoted Line Items  List View Search  Creating a Filter  Saving a Filter</p>	<p>The Searching for Records section provides an introduction to the two searching methods for locating quoted line items: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Quoted Line Items module.</p>
<p>Quoted Line Items 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</p>	<p>The List View section walks through the many elements of the Quoted Line Items List View layout which contains a filterable list of all quoted line item 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 Quoted Line Items list view are described in the List View Mass Actions Menu and List View Record Actions</p>

<p>Preview  Record Actions Menu  More Quoted Line Items  Activity Stream  Dashboards</p>	<p>Menu sections of this page.</p>
<p>Quoted Line Items Record View  Favorite Designation  Following Designation  Next or Previous Record  Actions Menu  Show More  Subpanels  Related Record Subpanels  Filtering Subpanels  Reordering Subpanels  Activity Stream  Dashboards</p>	<p>The Record View section walks through the many elements of the Quoted Line Items Record View layout which contain detailed information about a single quoted line item record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Quoted Line Items record view are described in the Record View Actions Menu section of this page.</p>
<p>Editing Quoted Line Items  Editing Inline via Record View  Editing via Record View  Editing Inline via Subpanels  Editing Inline via List View  Mass Editing via List View  Editing Fields</p>	<p>The most common way to edit quoted line items in Sugar is via the quote worksheet under a quote record, which is covered in detail in the Quotes documentation.</p> <p>The links to the left will take you to the User Interface documentation, which describes the various methods of editing records including inline via the Quoted Line Items record view, in full edit mode on the record view, and via the Mass Update option on the list view.</p>
<p>Deleting Quoted Line Items  Deleting via Record View  Deleting via List View  Mass Deleting via List View</p>	<p>The Deleting Records section describes the various methods of deleting unwanted quoted line items, including via the Quoted Line Items record view, an individual record's Actions menu on the Quoted Line Items list view, and the Mass Actions menu on the list view.</p>
<p>Exporting Quoted Line Items</p>	<p>The Exporting Records section provides an introduction to the export functionality which allows you to download a list of quoted line items and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).</p>

<p>Recalculating Calculated Values</p>	<p>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 &gt; Studio.</p>
<p>Finding Duplicate Quoted Line Items</p>	<p>The Finding Duplicate Records section provides instructions for locating duplicate quoted line item records. If searching on matching fields (e.g. Name) identifies one or more duplicates, they can be merged into a single record.</p>
<p>Merging Quoted Line Items Merging via List View</p>	<p>The Merging Records section provides instructions for merging duplicate quoted line items which will combine field values and related records into a single quoted line item.</p>
<p>Viewing Quoted Line Item Change Logs</p>	<p>The Viewing Record Change Logs section describes the View Change Log record view option which displays a history of changes to the quoted line item's audited fields.</p>
<p>Favoriting Quoted Line Items Favoriting via List View Favoriting via Record View Favoriting via Subpanel</p>	<p>The Favoriting Records section describes the various methods of marking quoted line items as favorites, including via the Quoted Line Items list view, Quoted Line Items record view, or any Quoted Line Items subpanel appearing on the record view of a related module. Favoriting a quoted line item allows you to easily access it from list views, dashlets, or the Quoted Line Items module tab.</p>
<p>Following Quoted Line Items Following via List View Following via Record View</p>	<p>The Following Records section describes the various methods of marking quoted line items as "Following", including via the Quoted Line Items list view and record view. Following a quoted line item causes its activity stream updates to be included on your Home page and Quoted Line Items list view activity streams so that you can easily keep up with changes and user posts on the record.</p>

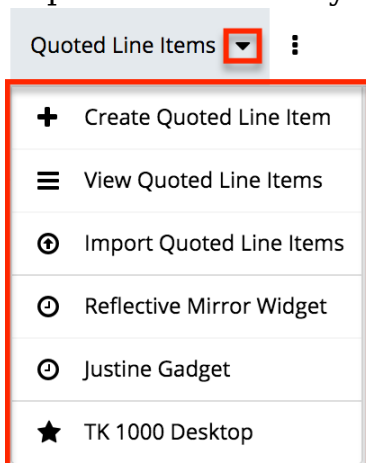
Sharing Quoted Line Items	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the quoted line item record. If the recipient is logged into Sugar, clicking the link will bring them directly to the quoted line item's record view.
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## Quoted Line Item Menus

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

### Module Tab Menus

The Quoted Line Items 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 "Quoted Line Items" to access the list view. Once the Quoted Line Items 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 quoted line items you most recently viewed. The Favorites Menu displays the list of quoted line items you most recently marked as favorites.



The Actions menu allows you to perform the following operations:

Menu Item	Description
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Create Quoted Line Item	Opens the record view layout to create a new quoted line item  Note: You can only relate quoted line items with a quote by creating them directly from a quote worksheet. For more information, please refer to the Quotes documentation.
View Quoted Line Items	Opens the list view layout to search and display quoted line items
Import Quoted Line Items	Opens the import wizard to create or update quoted line items using external data

If you do not see the Quoted Line Items module tab in Sugar, please check the following:

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

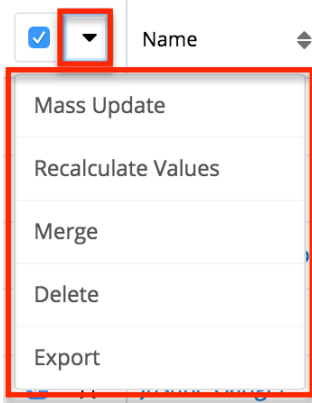
## List View Menus

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

## List View Mass Actions Menu

The Mass Actions menu to the right of the checkbox option in the list header allows you to perform mass actions on all currently selected records. You can use the checkbox on each record's row to select individual quoted line item records or

click the checkbox in the list header to select all records displayed on the current set of list view results.



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

Menu Item	Description
Mass Update	Mass update one or more quoted line items at a time
Recalculate Values	Mass update the calculated quote values to reflect changes made in Studio
Merge	Merge two or more duplicate quoted line items
Delete	Delete one or more quoted line items at a time
Export	Export one or more quoted line items 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 quoted line item directly from the list view.





<input type="checkbox"/>	<input type="checkbox"/>	Name	Account Name	Status	Quote Subject	Quantity		
<input type="checkbox"/>	<input type="checkbox"/>	TK m30 Desktop	Smith & Sons	Quoted	Computers for ...	2.00		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	TK 1000 Desktop	Smith & Sons	Quoted	Computers for ...	1.00		<ul style="list-style-type: none"> <li>Edit</li> <li>Follow</li> <li>Delete</li> </ul>
<input type="checkbox"/>	<input type="checkbox"/>	Reflective Mirr...	Smith & Sons	Quoted	Mirrors for Smi...	2.00		
<input type="checkbox"/>	<input type="checkbox"/>	Justine Gadget	White Cross Co		White Cross Co	31		

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

Menu Item	Description
Preview (Eye icon)	Preview this quoted line item in the intelligence pane
Edit	Edit this quoted line item
Follow	Follow this quoted line item
Delete	Delete this quoted line item

## Record View Actions Menu

The Quoted Line Items record view displays a single quoted line item in full detail including its fields, subpanels of related records, and activity stream. To access a quoted line item's record view, simply click a hyperlinked quoted line item name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.

**Reflective Mirror Widget**
☆
Follow

< >
Edit

---

Product Template  
[Reflective Mirror Widget](#)

Quote Name  
[Mirrors for Smith & Sons](#)

Quantity  
2.00

Account Name  
[Smith & Sons](#)

Status  
**Quoted**

Unit Price  
\$260.00

- Share
- Find Duplicates
- Copy
- View Change Log
- Delete

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

Menu Item	Description
Edit	Edit this quoted line item.

Share	<p>Share a link to this quoted line item via email.</p> <p>Note: To send emails through Sugar, users must first configure a default user email account via Emails &gt; Email Settings.</p>
Download PDF	<p>Download the record's information as a PDF file.</p> <ul style="list-style-type: none"> <li>• This menu option is only visible if the administrator has created a PDF template for the Quoted Line Items module via Admin &gt; PDF Manager.</li> <li>• Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul>
Email PDF	<p>Email the record's information as a PDF attachment.</p> <ul style="list-style-type: none"> <li>• This menu option is only visible if the administrator has created a PDF template for the Quoted Line Items module via Admin &gt; PDF Manager.</li> <li>• Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul> <p>Note: To send emails through Sugar, users must first configure a default user email account via Emails &gt; Email Settings.</p>
Find Duplicates	Locate potential duplicates of this quoted line item.
Copy	Create a duplicate record of this quoted line item.
View Change Log	View a record of changes to this quoted line item.

Delete	Delete this quoted line item.
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## Quotes and Quoted Line Items

Quotes are often an integral part of an organization's negotiation and completion of sales. In Sugar, the Quotes module serves as a header for the sale and includes information about the entire transaction such as the billing address, total amounts, and stage. Each quote contains one or more quoted line items which represent each kind of item or service that is being sold. Quoted line items include the quantity, prices, and discounts specific to a single product.

### Creating Quoted Line Items via Quotes

Since a quote is made up of one or more quoted line items, you will most often create quoted line items while creating or editing the quote itself. The Quotes detail view layout allows you to add line items and select products. For more information about products, please refer to the Products and Quoted Line Items section of this page. Each line added to a quote becomes a new quoted line item record upon save. For more information on adding quoted line items to quotes, please refer to the Quotes documentation.

After adding a quoted line item to a quote, you can navigate to the quoted line item's record view by clicking its hyperlinked name on the quote worksheet.

+		Total Discount	Discounted Subtotal	Total Tax	Shipping	Grand Total
		0.00%	\$0.00	\$442.45	\$0.00	\$5,805.45
<input type="checkbox"/>	⋮	Quantity	Line Item	Part Number	Unit Price	
Use the + create menu to add a line item, comment, or group to this Quote.						
+		<b>Computers</b>				
<input type="checkbox"/>	⋮	TK Desktop Computers				
<input type="checkbox"/>	⋮	1	1.00	<a href="#">TK 1000 Desktop</a>	XYZ7890122222	\$800.00
<input type="checkbox"/>	⋮	2	2.00	<a href="#">TK m30 Desktop</a>	ABCD123456890	\$1,625.00

Note: Quoted line items only appear on a quote record when it is created directly from the Quotes module. For more information, please refer to the Quotes documentation.

## Products and Quoted Line Items

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Sugar's Product Catalog module contains a list of all products or services that your organization sells. This module provides the Quoted Line Items and Revenue Line Items modules with the template used when creating products to be used for Quotes and Opportunities, including pricing and cost information as well as information about the manufacturer. The Product Catalog is maintained by administrators via Admin > Products and Quotes. For more information, please refer to the Products and Quotes documentation in the Administration Guide.

When adding products as quoted line items, you may select a product from your database's Product Catalog module or you may manually enter a new product on the fly. Either way, each line item added to a quote will create a new record in the Quoted Line Items module. After adding a quoted line item to a quote, you can navigate to the quoted line item's record view by clicking its hyperlinked name on the quote worksheet.

If you selected a product from the product catalog, the Product Template field will be populated with the product's name on the quoted line item's record view. However, if you manually entered a product to your quoted line item, then the Product Template field will not be populated since the product does not exist in the product catalog.

Product Template	Account Name
<b>Reflective Mirror Widget</b>	Smith & Sons
Quote Name	Status
Mirrors for Smith & Sons	Quoted

## Currencies and Quoted Line Items

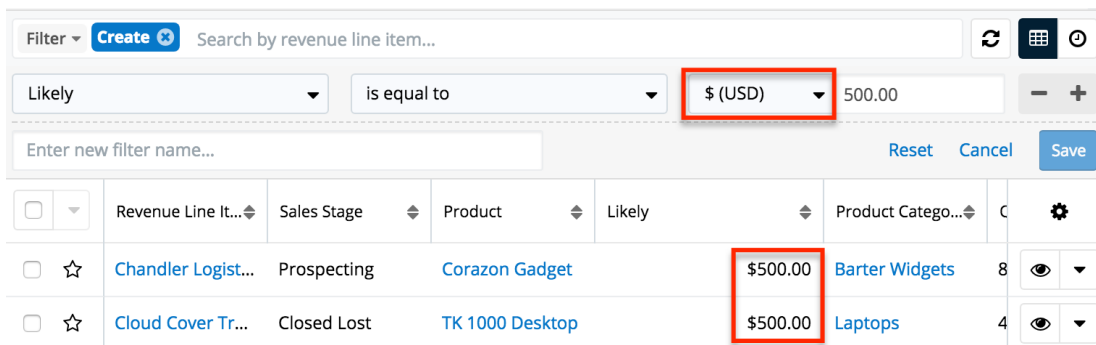
Sugar allows your organization to perform business around the world by supporting multiple currencies. Administrators must first add desired currencies and exchange rates to Sugar via Admin > Currencies. They also have the ability to set the instance's default currency via Admin > Locale. This is typically the currency of the country where the majority of business is conducted. For more information, please refer to the System documentation in the Administration Guide.

Users can specify their own preferred currency in their user profiles. If they choose to also enable the Show Preferred Currency option in their profiles, currency fields throughout Sugar will display in their chosen currency. For more information, please refer to the Getting Started documentation. Finally, each quoted line item record has a Currency field where you will specify the currency being used for this particular business transaction.

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## Filtering on Currency Fields

Currency fields are filtered according to the record's set currency rather than being standardized to the user's preferred or system default currency. In the list view, filtering opportunities by a currency field allows you to specify the filter's currency. Only records matching both the chosen currency and amount range will be returned. For example, if you filter based on a Likely value that equals 500 in US Dollars, then the search result will return all opportunities with a Likely value of \$500 but will exclude values of €500 or other currency values which are equivalent to \$500.



The screenshot shows a filter interface with a search bar and a filter dropdown. The filter is set to 'Likely' with the operator 'is equal to' and the value '\$ (USD) 500.00'. Below the filter, a table of records is displayed. The 'Likely' column for two records, 'Chandler Logist...' and 'Cloud Cover Tr...', shows '\$500.00', which is highlighted with red boxes.

	Revenue Line It...	Sales Stage	Product	Likely	Product Catego...	C	
<input type="checkbox"/>	Chandler Logist...	Prospecting	Corazon Gadget	\$500.00	Barter Widgets	8	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Cloud Cover Tr...	Closed Lost	TK 1000 Desktop	\$500.00	Laptops	4	<input type="checkbox"/> <input type="checkbox"/>

Note: By contrast, when filtering values in the Reports module, any record matching the specified amount or range will be returned regardless of the record's currency. For example, if one quoted line item's Likely value is \$500 in US Dollars and another's is €500 in Euros, filtering a report for a Likely value of exactly 500 will return both records in the report.

## Updating Currency Rates

When saving a quoted line item in a currency that differs from the system-defined default currency, Sugar will store the conversion rate for that currency at the record level. This conversion rate is used to calculate the converted amounts when they are set to use the system default currency (as opposed to the user's preferred currency which is explained below). To keep amounts historically accurate, the conversion rate will only update on a quoted line item provided the status is not set to "Shipped". If the line item is in any other sales stage, the conversion rate will update under the following scenarios:

- The quoted line item undergoes a save event (e.g. mass update, manual save, etc.) and the record's currency has a different conversion rate defined in Admin > Currencies than is currently saved in the line item.
- An administrator updates the currency exchange rate under Admin > Currencies. This will trigger a scheduled job which updates all quoted line

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items saved with that currency to the new rate.

When the viewing user's profile has the Show Preferred Currency option selected, the converted amount fields display in the user's preferred currency. In this case, the conversion rate is drawn directly from the conversion rate at the system level rather than any conversion rate stored on the record. This means that the value will always use the current conversion rate regardless of the quoted line item's status. For this reason, the Price and List fields should not be considered historically accurate for closed business when it is using the user's preferred currency. For information about setting a user's Preferred Currency and Show Preferred Currency options, please refer to the Getting Started documentation.

For more information about currency exchange rates, please refer to the System documentation in the Administration Guide.

Last Modified: 2018-01-03 20:00:24

## Contracts

### Overview

Sugar's Contracts module consists of individual business arrangements your organization has with vendors, customers, or association. There are various ways you can create contracts in Sugar such as via the Contracts module, importing contracts, duplication, etc. Once the contract record is created, you can view and edit information pertaining to the contract via the Contracts module. Each contract record may then relate to other Sugar records such as opportunities, documents, quotes, and many others. This documentation will cover the basics of the Contracts module as well as the various options available in performing the actions related to the module.

For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting contract records, please refer to the Working With Contracts section of this page.

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

Note: By default, the Contracts module is hidden in Sugar and the system administrator must enable the module via Admin > Display Modules and Subpanels. For more information on displaying modules in Sugar, please refer to

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the Developer Tools documentation in the Administration Guide.

## Contract Fields

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

Field	Description
Account Name	The account to which the contract belongs
Assigned To	The Sugar user assigned to the contract
Company Signed Date	Date on which your organization signed the contract
Contract Name	The name or designation of the contract
Contract Term	Calculation of days between the start and end date of the contract
Contract Value	The value of the contract for the specified currency
Customer Signed Date	Date on which the account signed this contract
Date Created	The date the contract record was created
Date Modified	The date the contract record was last modified
Description	A description or other information about the contract
End Date	Date on which this contract expires
Expiration Notice	Date and time to send a reminder to the assigned user indicating that this contract will expire shortly Note: Assignment notifications must be turned on and the "Process Workflow Tasks" scheduler must be running.
Opportunity Name	The opportunity if any, from which the contract originated or is related to

Reference Code	The internal designation used to refer to this contract
Start Date	Date on which this contract takes effect
Status	The current status of the contract (e.g. Not Started, In Progress, Signed)
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports Note: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the contract record
Type Name	The contract type assigned to the record Note: Contract types can be created and managed via Admin > Contract Types.

## Working With Contracts

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 Contracts section describe Contracts-specific behaviors and functionality.

Content Link	Description
<a href="#">Creating Contracts</a> <a href="#">Basic Contract Creation</a> <a href="#">Creating via Quick Create</a> <a href="#">Creating via Subpanels</a> <a href="#">Creating via Duplication</a> <a href="#">Importing Contracts</a>	The Creating Records section covers the various methods of creating new contract records, including via the Create button in the Contracts module, the Quick Create menu on the upper right of every Sugar page, via the Contracts subpanel on related module records, duplication of an existing contract record, and importing a list of contracts into Sugar using a .csv spreadsheet.
<a href="#">Viewing Contracts</a> <a href="#">Viewing via List View</a> <a href="#">Viewing via Record View</a> <a href="#">Viewing via Recently Viewed</a> <a href="#">Viewing via Dashlets</a>	The Viewing Records section describes the various methods of viewing contract records, including via the Contracts list view and record view, the Recently Viewed menu in the Contracts module



<p>Viewing via Activity Streams Viewing via Preview Viewing via Reports</p>	<p>tab, list view dashlets showing contract information, activity stream entries concerning contract updates or where a user mentions a contract, previewing contracts in the right hand side panel, and reports displaying contract data.</p>
<p>Searching for Contracts Global Search List View Search Creating a Filter Saving a Filter</p>	<p>The Searching for Records section provides an introduction to the two searching methods for locating contracts: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Contracts module.</p>
<p>Contracts 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 Contracts Activity Stream Dashboards</p>	<p>The List View section walks through the many elements of the Contracts List View layout which contains a filterable list of all contract 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 Contracts list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.</p>
<p>Contracts 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</p>	<p>The Record View section walks through the many elements of the Contracts Record View layout which contains detailed information about a single contract record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Contracts record view are described in the Record View Actions Menu section of this page.</p>
<p>Editing Contracts Editing Inline via Record View Editing via Record View</p>	<p>The Editing Records section describes the various methods of editing existing contract records, including inline via the</p>

<p>Editing Inline via Subpanels  Editing Inline via List View  Mass Editing via List View  Editing Fields</p>	<p>Contracts record view, in full edit mode on the record view, inline via the Contracts subpanel on related module records, inline via the Contracts list view, and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.</p>
<p>Deleting Contracts  Deleting via Record View  Deleting via List View  Mass Deleting via List View</p>	<p>The Deleting Records section describes the various methods of deleting unwanted contracts, including via the Contracts record view, an individual record's Actions menu on the Contracts list view, and the Mass Actions menu on the list view.</p>
<p>Exporting Contracts</p>	<p>The Exporting Records section provides an introduction to the export functionality which allows you to download a list of contracts and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).</p>
<p>Recalculating Calculated Values</p>	<p>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 &gt; Studio.</p>
<p>Finding Duplicate Contracts</p>	<p>The Finding Duplicate Records section provides instructions for locating duplicate contract records. If searching on matching fields (e.g. Name) identifies one or more duplicates, they can be merged into a single record.</p>
<p>Merging Contracts  Merging via List View</p>	<p>The Merging Records section provides instructions for merging duplicate contracts which will combine field values and related records into a single contract.</p>
<p>Viewing Contract Change Logs</p>	<p>The Viewing Record Change Logs section describes the View Change Log record view option which displays a history of changes to the contract's audited fields.</p>

<p>Contract PDFs          Downloading Contract PDFs          Emailing Contract PDFs</p>	<p>The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of contract information as configured by an administrator via Admin &gt; PDF Manager.</p>
<p>Favoriting Contracts          Favoriting via List View          Favoriting via Record View          Favoriting via Subpanel</p>	<p>The Favoriting Records section describes the various methods of marking contracts as favorites, including via the Contracts list view, Contracts record view, or any Contracts subpanel appearing on the record view of a related module. Favoriting a contract allows you to easily access it from list views, dashlets, or the Contracts module tab.</p>
<p>Following Contracts          Following via List View          Following via Record View</p>	<p>The Following Records section describes the various methods of marking contracts as "Following", including via the Contracts list view and record view. Following a contract causes its activity stream updates to be included on your Home page and Contracts list view activity streams so that you can easily keep up with changes and user posts on the record.</p>
<p>Sharing Contracts</p>	<p>The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the contract record. If the recipient is logged into Sugar, clicking the link will bring them directly to the contract's record view.</p>

## Contract Menus

The Contracts 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 Contracts-specific functionality, within this page.

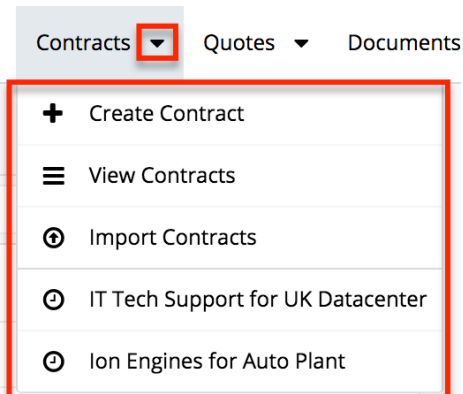
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## Module Tab Menus

The Contracts module tab is typically located under the More tab on the navigation bar at the top of any Sugar screen. Sugar normally displays the top six modules shown in the Display Modules list of your user preferences with the remaining displayed modules grouped under the More tab. For more information on displayed modules for the navigation bar, please refer to the Layout Options section of the Getting Started documentation.

Note: By default, the Contracts module is hidden in Sugar and the system administrator must enable the module via Admin > Display Modules and Subpanels. For more information on displaying modules in Sugar, please refer to the Developer Tools documentation in the Administration Guide.

Click the tab to access the Contracts list view. You may also click the triangle in the Contracts module tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important operations within the module. The Recently Viewed menu displays the list of contracts you most recently viewed. The Favorites menu displays the list of contracts you most recently marked as favorites.



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

Menu Item	Description
Create Contract	Opens the record view layout to create a new contract
View Contracts	Opens the list view layout to search and display contracts
Import Contracts	Opens the import wizard to create or update contracts using external data

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

- By default, the Contracts module is hidden in Sugar and the system administrator must enable the module via Admin > Display Modules and

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Subpanels. For more information on displaying modules in Sugar, please refer to the Developer Tools documentation in the Administration Guide.

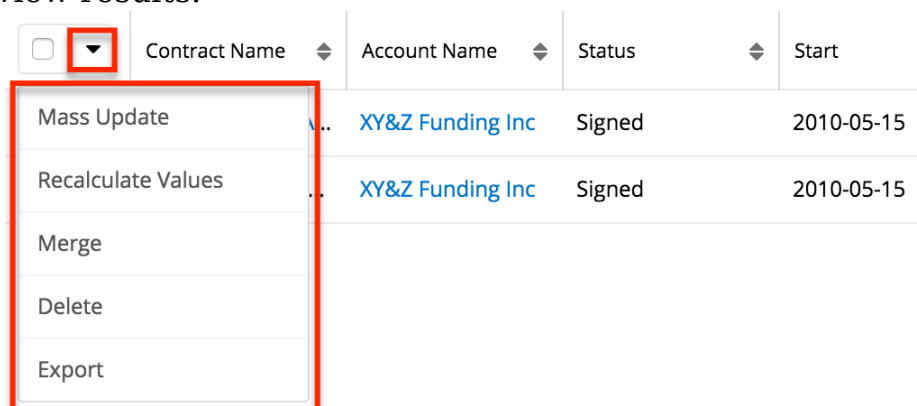
- The Contracts module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Contracts module in the Hide Modules list,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

## List View Menus

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

## List View Mass Actions Menu

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 contract records or click the checkbox in the list header to select all records displayed on the current set of list view results.



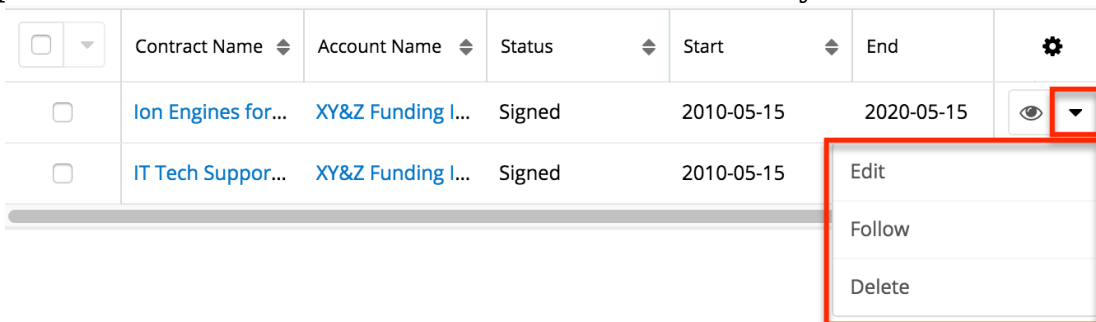
<input type="checkbox"/>	Contract Name	Account Name	Status	Start
<input type="checkbox"/>	...	<a href="#">XY&amp;Z Funding Inc</a>	Signed	2010-05-15
<input type="checkbox"/>	...	<a href="#">XY&amp;Z Funding Inc</a>	Signed	2010-05-15

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

Menu Item	Description
Mass Update	Mass update one or more contracts at a time
Recalculate Values	(Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio
Merge	Merge two or more duplicate contracts
Delete	Delete one or more contracts at a time
Export	Export one or more contracts 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 contract directly from the list view.



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

Menu Item	Description
Preview (Eye icon)	Preview this contract in the intelligence pane
Edit	Edit this contract
Follow	Follow this contract
Delete	Delete this contract

### Record View Actions Menu

The Contracts record view displays a single contract in full detail including its fields, subpanels of related records, and activity stream. To access a contract's

record view, simply click a hyperlinked contract name from anywhere within Sugar. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.

Reference Code	Status
EMP-7277	Signed
Account Name	Start Date
<a href="#">XY&amp;Z Funding Inc</a>	2010-05-15
Opportunity Name	End Date
	2020-05-15
Type Name	Contract Term
	3,653


The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this contract record.
Share	Share a link to this contract via email.  Note: To send emails through Sugar, users must first configure a default user email account via Emails > Email Settings.
Download PDF	Download the record's information as a PDF file.  <ul style="list-style-type: none"> <li>• This menu option is only visible if the administrator has created a PDF template for the Contracts module via Admin &gt; PDF Manager</li> <li>• Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul>
Email PDF	Email the record's information as a PDF attachment.  <ul style="list-style-type: none"> <li>• This menu option is only visible if the administrator has created a</li> </ul>

	<p>PDF template for the Contracts module via Admin &gt; PDF Manager</p> <ul style="list-style-type: none"> <li>Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul> <p>Note: To send emails through Sugar, users must first configure a default user email account via Emails &gt; Email Settings.</p>
Find Duplicates	Locate potential duplicates of this contract record.
Copy	Duplicate this record to create a new contract.
View Change Log	View a record of changes to this contract record.
Delete	Delete this contract.

## Relating Signed Documents

The Documents subpanel allows users to relate new or existing documents to the current contract record they are viewing. Documents that are marked as a "Template" give users the ability to perform additional actions for the document record via the Contracts module. This feature is best used for a standard contract or agreement document that the organization will have to sign. Once the contract is signed by the organization, users can click the Sign link to the far right of the document record's row which will allow them to create a new document record and upload the file. The new document record containing the signed contract will be related to the template document as well as the contract record. You will now see both the original contract template as well as the signed contract in the Documents subpanel of the contract record.

Source ⇅	Status ⇅	Publish Date ⇅		
Sugar	Active	04/01/2013	 Sign	edit ▾

## Pulling Latest Revision

When a document that is related to a contract gets revised you have the option of pulling the latest revision to be linked to the contract record. Simply click the "Get latest" link to the far right of the document record's row to update the related



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document's file with the most recent version.

Source	Status	Publish Date		
Sugar	Active	04/01/2013	<a href="#">Get latest</a>	edit
Sugar	Active	04/01/2013	<a href="#">Sign</a>	edit

Last Modified: 2018-01-03 18:56:34

## 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.

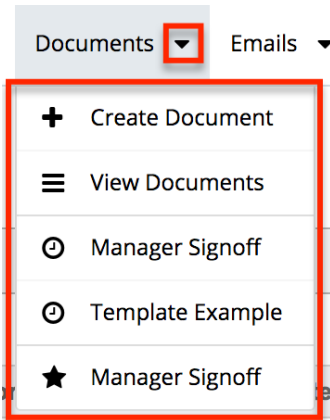
Field	Description
Assigned To	The Sugar user assigned to the document
Category	Primary category for locating documents
Description	A description or other information about the document
Document Name	The name or designation of the

	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

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information on configuring layouts, please refer to the Studio documentation in the Administration guide.

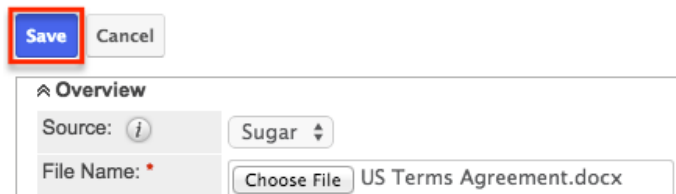
## Creating Via Documents Module

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".

Create



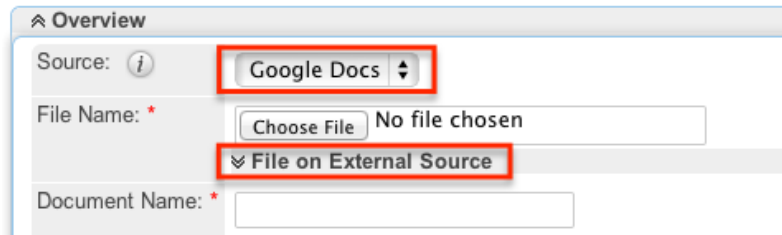
The screenshot shows a form with two buttons at the top: "Save" (highlighted with a red box) and "Cancel". Below the buttons is a section titled "Overview" with a caret icon. Under "Overview", there are two rows of fields. The first row has "Source:" with an information icon and a dropdown menu showing "Sugar". The second row has "File Name:" with a red asterisk, a "Choose File" button, and the text "US Terms Agreement.docx".

## 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.



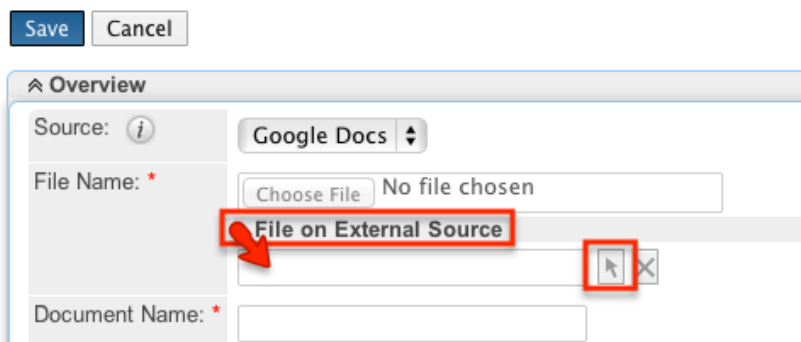
Note: If Google Docs is not an option in the Source dropdown, then you most likely need to connect your Sugar account to your Google Id through your user profile. For more information on how to connect to your Google Id in Sugar, please refer to the Google Docs Integration section in this documentation.

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

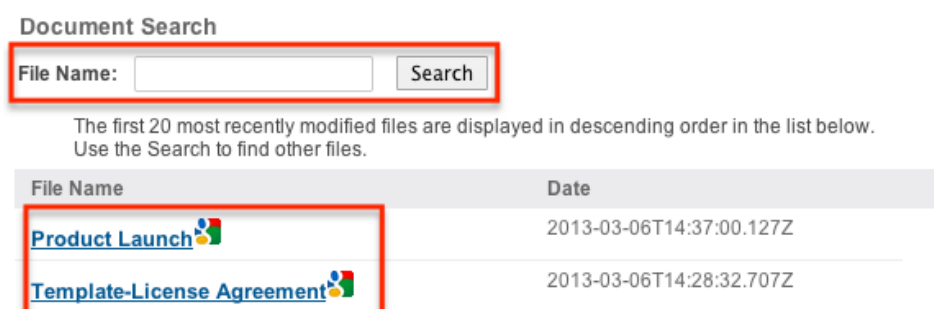
Alternatively, click "File on External Source" to reveal the external source selector.



Click the arrow button to launch the selector. This window will show the 20 most recently modified documents in your Google Drive.

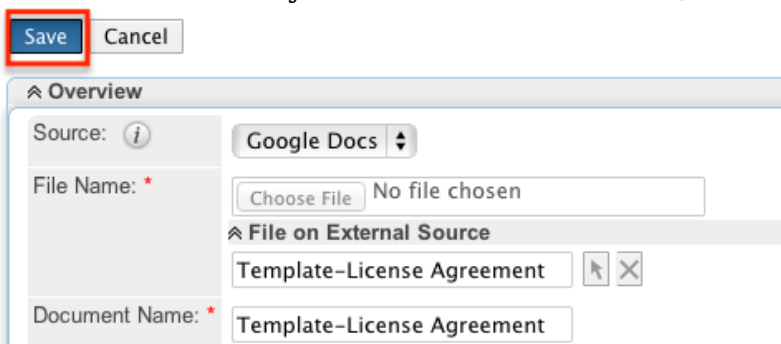
Note: This will only show documents owned by you in your Google Drive, and will show documents from all folders in your drive.

Use the Search box to find a specific document. Select a document by clicking on the document's file name.



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

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



Note: Documents that link to an external account (e.g. Google Docs, IBM Smart Cloud) cannot be used as attachments in emails composed through the Sugar Email Client.

## Creating Via Quick Create

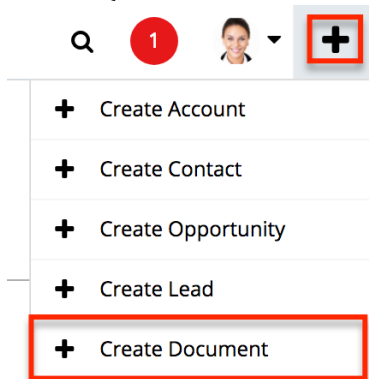
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The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also quick create a document from any Documents subpanel on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

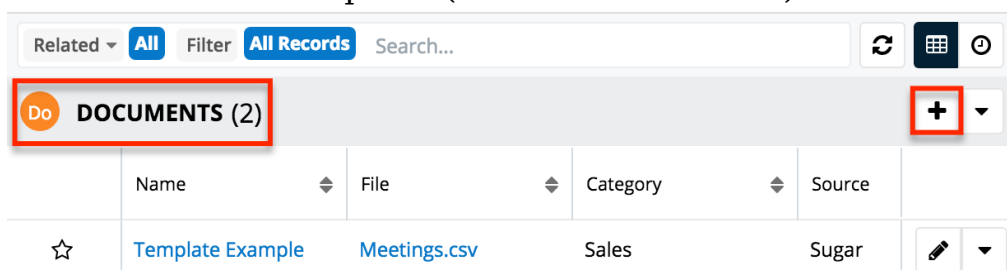
Use the following steps to create a document via Quick Create:

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):

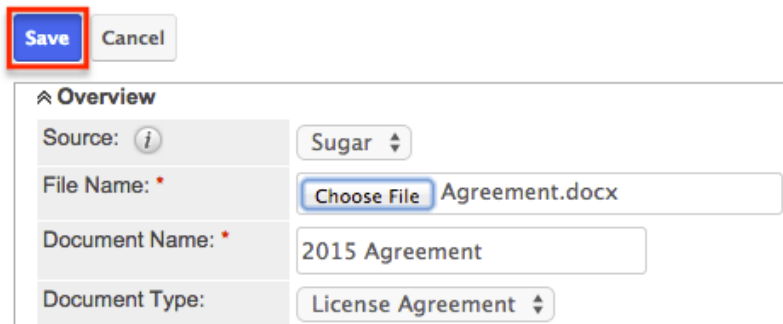


2. Enter appropriate values in the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. If creating the document via the Documents subpanel in a Legacy module and additional fields are desired, click the Full Form button to use edit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



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## Create



Save Cancel

Overview

Source: *i* Sugar

File Name: \* Choose File Agreement.docx

Document Name: \* 2015 Agreement

Document Type: License Agreement

## 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 ☆



Edit

Copy

Delete

File Name: Agreement.docx

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



Save Cancel

Overview

Source: *i* Sugar

File Name: \* Agreement.docx

Document Name: \* Contract Agreement

Note: The Source and File Name fields can not be modified when duplicating a document.

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## 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.

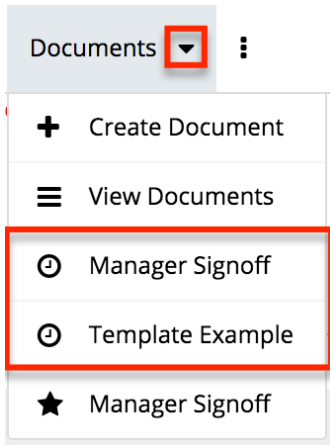
### Viewing Via Detail View

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.

My Dashboard

My Documents

Name	File	Status
Agreement	Agreement.docx	Active
Contract Agreement	Agreement.docx	Active
Terms	Agreement.docx	Active

## 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

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display columns. For more information on using reports, please refer to the Reports documentation.

**Name:** Documents Report  
**Modules:** Documents  
**Display Columns:** Document Name, Date Created, Date Modified  
**Schedule:** None  
**Filters:** None

Document Name ⇅	Date Created ⇅
Agreement	2015-05-25 19:15
Terms	2015-05-26 20:34

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.

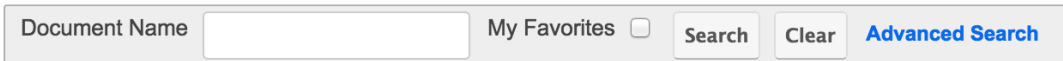
### Basic Search

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:

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- 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



The screenshot shows a search panel with the following elements: a text input field labeled "Document Name", a checkbox labeled "My Favorites", a "Search" button, a "Clear" button, and a blue link labeled "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 documentations in the Administration guide.

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

## Advanced Search

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

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

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

- **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.

### Search Documents

The screenshot shows a search interface with the following elements:

- Document Name**: A text input field.
- Category**: A multiselect dropdown menu with options: Marketing, Knowledge Base, Sales.
- Sub Category**: A multiselect dropdown menu with options: Marketing Collateral, Product Brochures, FAQ.
- Publish Date**: A date input field with a calendar icon.
- Expiration Date**: A date input field with a calendar icon.
- Assigned to**: A multiselect dropdown menu with options: Administrator, Chris Olliver, Jim Brennan, Max Jensen, Sally Bronsen, Sarah Smith.
- My Favorites**: A checkbox that is currently unchecked.
- Layout Options**: A section containing:
  - Save search as:** A text input field followed by a **Save** button.
  - Modify current search:** **Update** and **Delete** buttons.
- Navigation**: A row of buttons: **Search**, **Clear**, **Browse Documents**, **Basic Search** (highlighted), **Saved Searches**, and a dropdown menu currently showing **-none-**.

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

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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

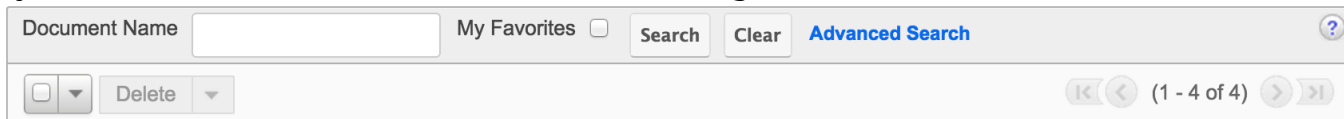
List view displays the current search results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the search panel you can see which records of the total results set are



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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.

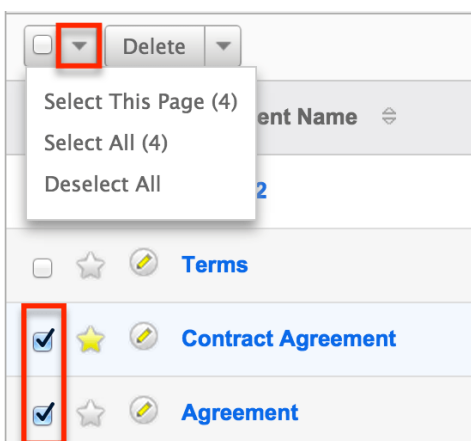
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.



## 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.

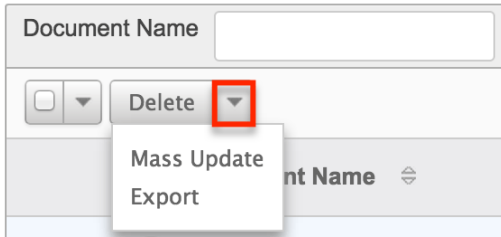


## Mass Actions Menu

The Mass Actions menu to the right of the checkbox dropdown allows you to

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perform various actions on the currently selected records.

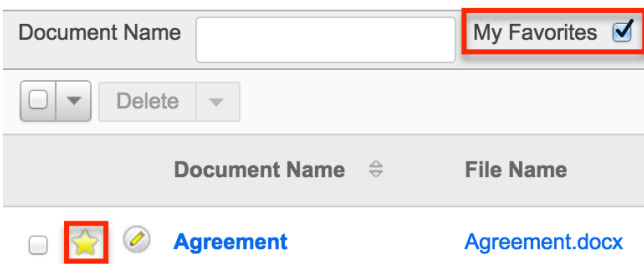


The options in the Mass Actions menu allow you to perform the following operations:

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.

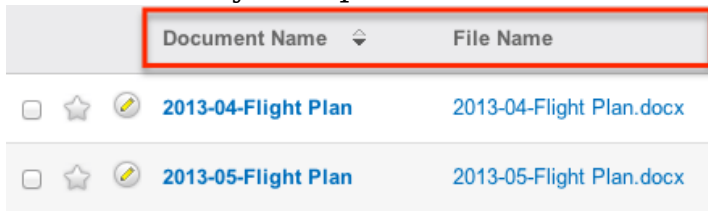


## Column Sorting

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

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refer to the Layout Options section of the Search documentation.



## Documents Detail View

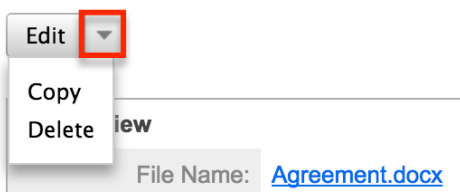
The Documents detail view displays thorough document information including all document fields which are grouped by default into the Overview and Revision Details panels. You can also view a document's related records (Document Revisions, Related Contracts, Accounts, etc.) which appear in subpanels beneath 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.

Agreement ★



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

Menu Item	Description
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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.

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## 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.

Accounts

Create

Select

	City	Billing Country	Phone	
24/7 Couriers	Kansas City	USA	(792) 938-6555	view

Contacts

unlink

## 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.

Document Revisions

Create

File	Revision	Date Created	Created by
<a href="#">Agreement.docx</a>	2	2015-05-27 13:26	Administrator
<a href="#">Agreement.docx</a>	1	2015-05-25 19:15	Administrator

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.

Create

Save Cancel

Document Name:	Agreement	Latest Revision:	2
Revision:	<input type="text" value="3"/>		
File:	<input type="button" value="Choose File"/> Agreement.docx	Source:	<input type="button" value="Sugar"/>
Change Log:	<input type="text" value="Layout modifications"/>		

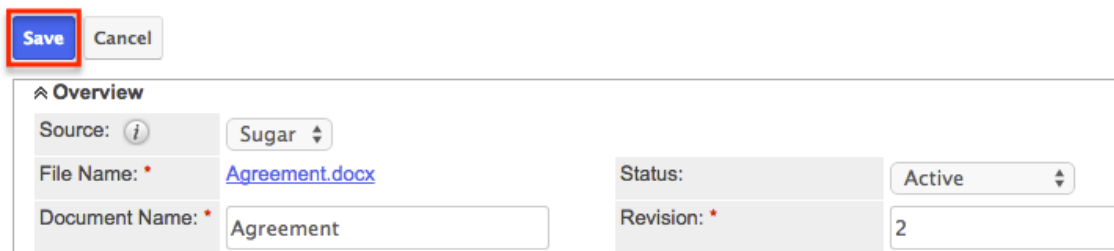
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You may also populate the Change Log field with a short description of the change being made for this revision. Click "Save" to complete the revision record.

## 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.

[Agreement](#) » Edit



The screenshot shows a 'Save' button highlighted with a red box, followed by a 'Cancel' button. Below these is a form titled 'Overview' with the following fields:

Source: ⓘ	Sugar		
File Name: *	<a href="#">Agreement.docx</a>	Status:	Active
Document Name: *	Agreement	Revision: *	2

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.

[Agreement](#) ☆



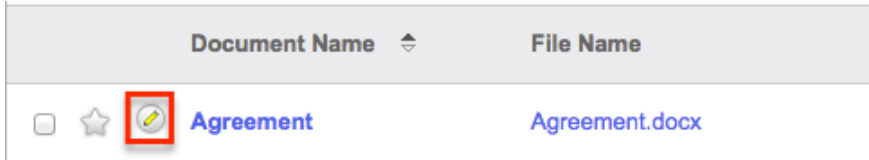
The screenshot shows an 'Edit' button highlighted with a red box. Below it is a form titled 'Overview' with the following fields:

File Name:	<a href="#">Agreement.docx</a>
Document Name:	Agreement

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## 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

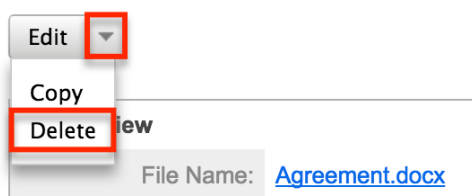
If a document record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Documents detail view or list view. Deleting via the detail view allows you to delete a single record while the list view allows for mass deleting multiple records at once. 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 ☆



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

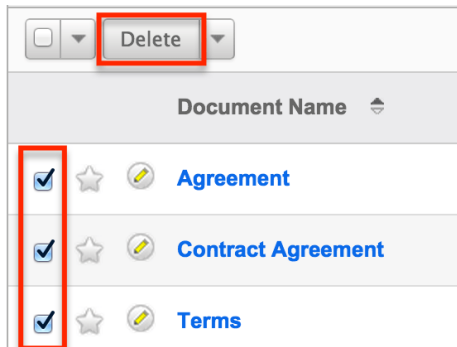
## Deleting Via List View



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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.



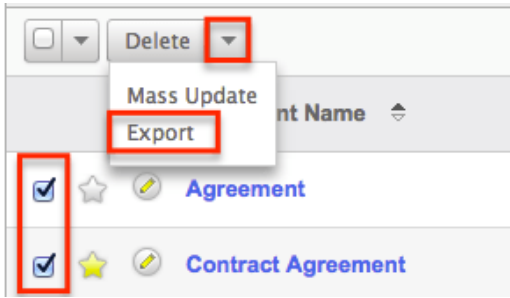
5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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.

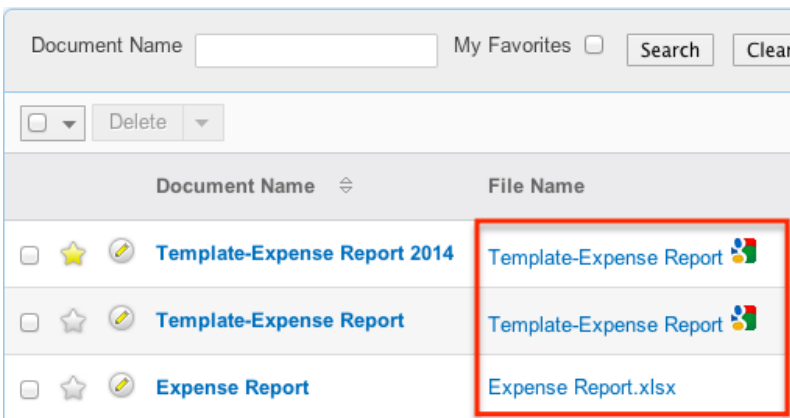


Please note that your ability to export documents from Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Export option.

## 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:

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Flight Plan.docx

Edit ▾

Overview	
File Name:	Flight Plan.docx
Document Name:	Flight Plan.docx
Document Type:	

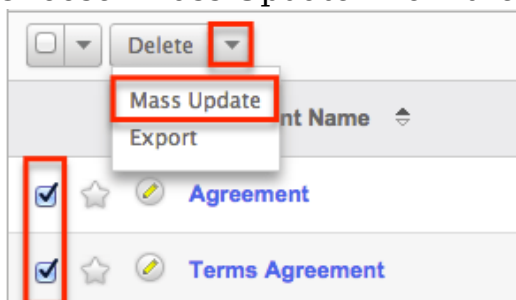
## Mass Updating Documents

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.

Mass Update

Assigned to:	<input type="text"/>	Publish Date:	<input type="text"/> (yyyy-mm-dd)
Expiration Date:	<input type="text"/> (yyyy-mm-dd)	Category:	-none-
Sub Category:	-none-	Status Id:	-none-
Is a Template	-none-	Document Type	-none-
Teams	<input type="text"/> Primary <input type="text"/> -		

Replace  Add

**Update** Cancel

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

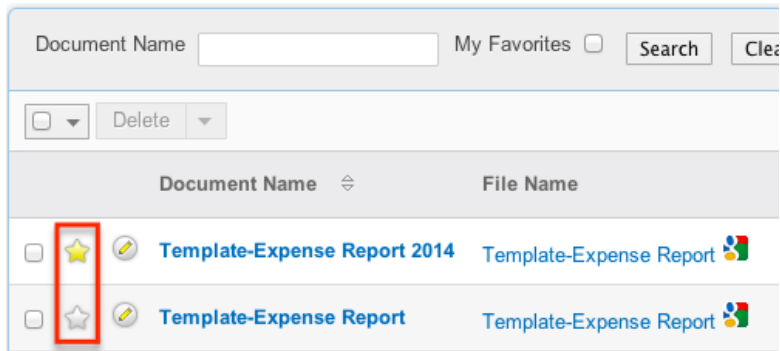
## Favoriting Documents

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.

Agreement 

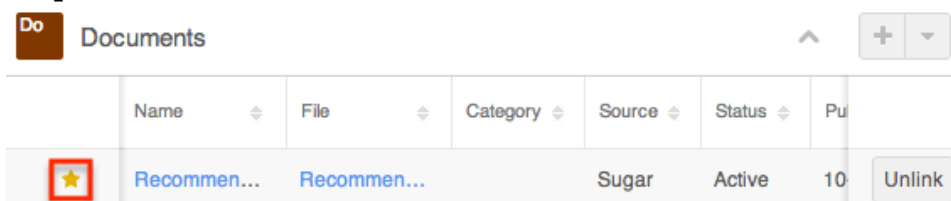
Edit 

^ Overview  
File Name: [Agreement.docx](#)

## 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.

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## 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.

Last Modified: 2018-01-03 19:51:20

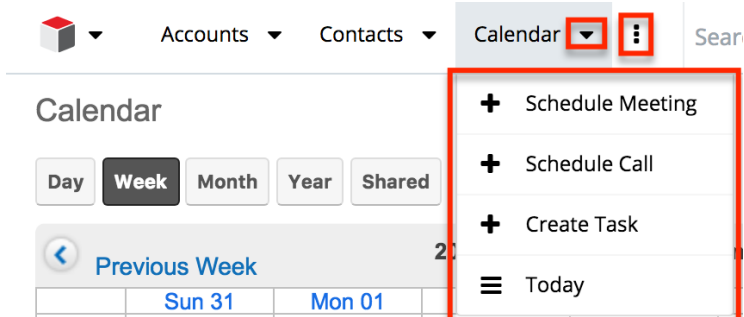
## Calendar

### 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

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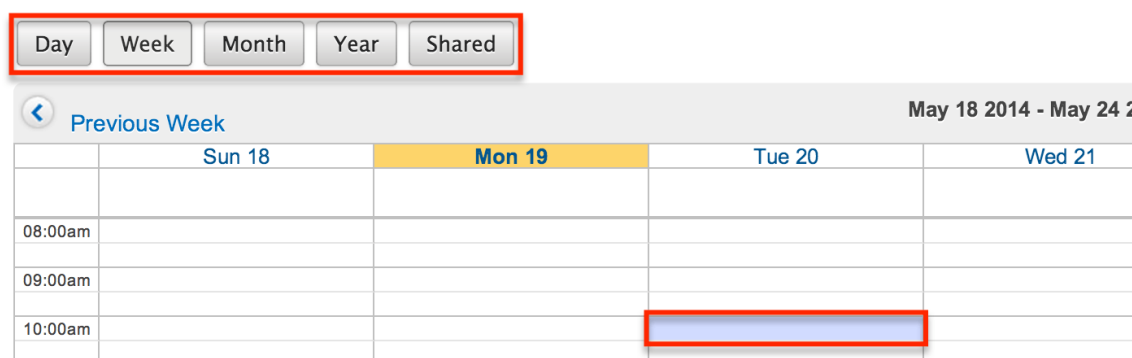
There are various methods for creating the different activities available in Sugar, including via the calendar itself, the Calendar module's actions menu, the individual activity's module, or via quick create. The record view opens in edit mode when creating the call directly from the Calls menu, Quick 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:

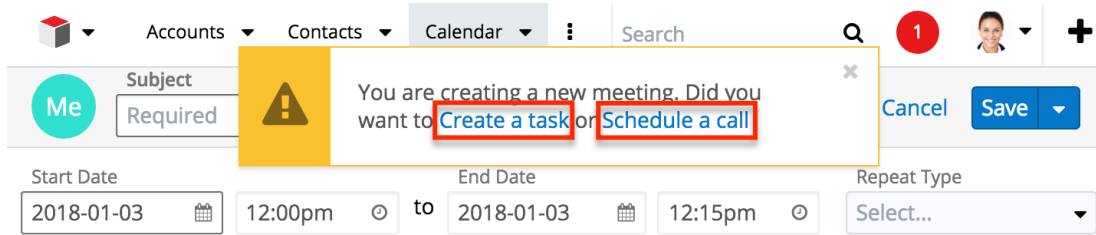
1. Click the Calendar module tab.
2. On the calendar view, click the cell corresponding to the date and time you wish to schedule the meeting. You can choose to view the calendar by Day, Week, Month, Year, or Shared. For more information on viewing the shared calendar, please refer to the Viewing Shared 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.







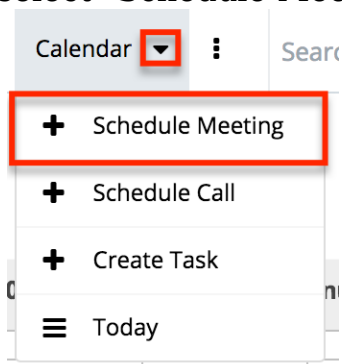
3. Refer to step 2 and beyond in Creating via Meetings Module section of the Meetings documentation for additional instructions about creating meeting records.

## 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.

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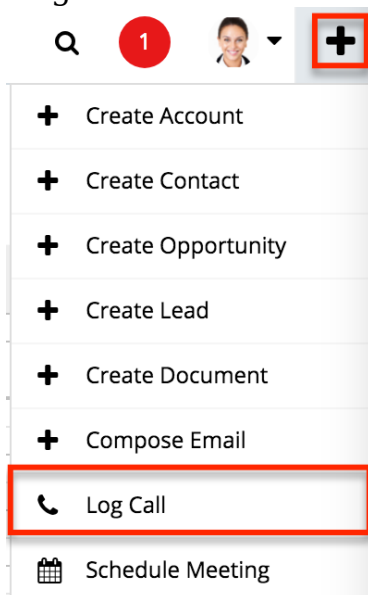
## Creating via Quick Create

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.

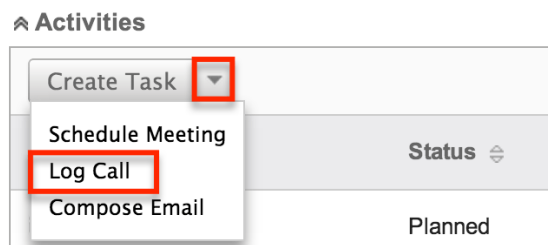
**Note:** As a best practice, if you are going to be relating the activity to any other record in Sugar, create the activity from the related record's record view, which will automatically relate the two records.

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:

Subject	Status	Contact	Start Date	End Date	Assigned User
★ Review Contract	Planned	Tonya Abhram	05/21/2014 3:...	05/21/2014 4:...	Max Jensen

From Planned Activities dashlet:

The screenshot shows the 'Planned Activities' dashlet. At the top right, there is a '+' icon in a red box. Below it, there are tabs for 'Today' and 'Future'. A 'Schedule Meeting' dropdown menu is open, and the 'Log Call' option is highlighted with a red box. Below the menu, there is a card for a meeting titled '1 Meeting' with the subject 'Discuss pricing' by Sarah Smith, in 2 months.

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.

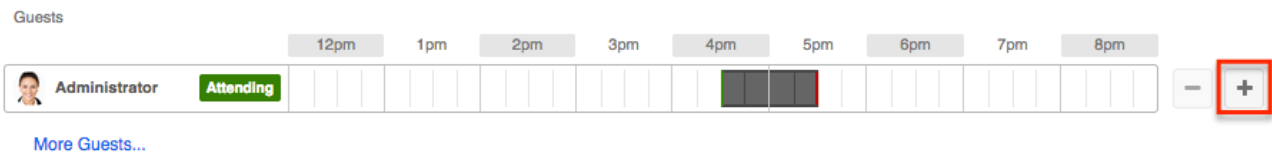
## Adding Invitees

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

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Users have the option to add invitees to the Guests panel directly from the meeting or call record view.



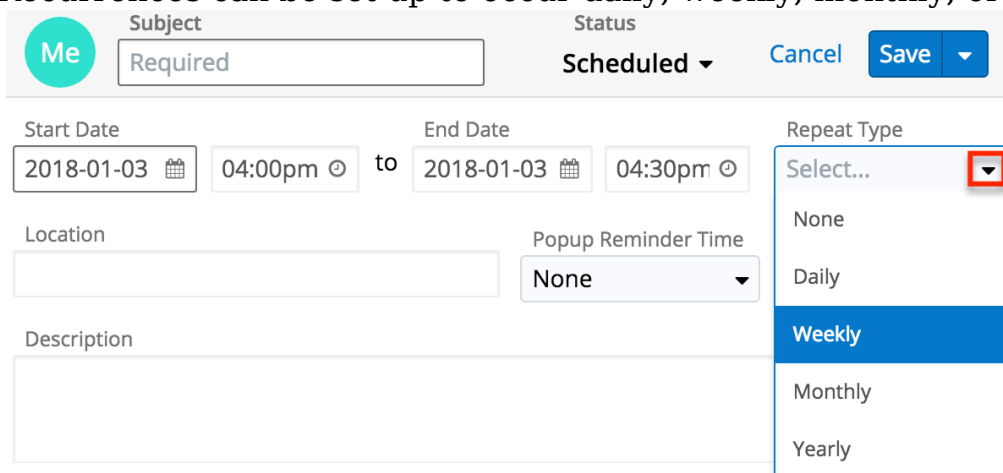
Please refer to the steps in the Adding via the Guests Panel section of the Meetings documentation for instructions on how to add invitees to meeting records.

### 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.



Subject: Required

Status: Scheduled

Start Date: 2018-01-03 04:00pm to End Date: 2018-01-03 04:30pm

Repeat Type: Weekly

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.

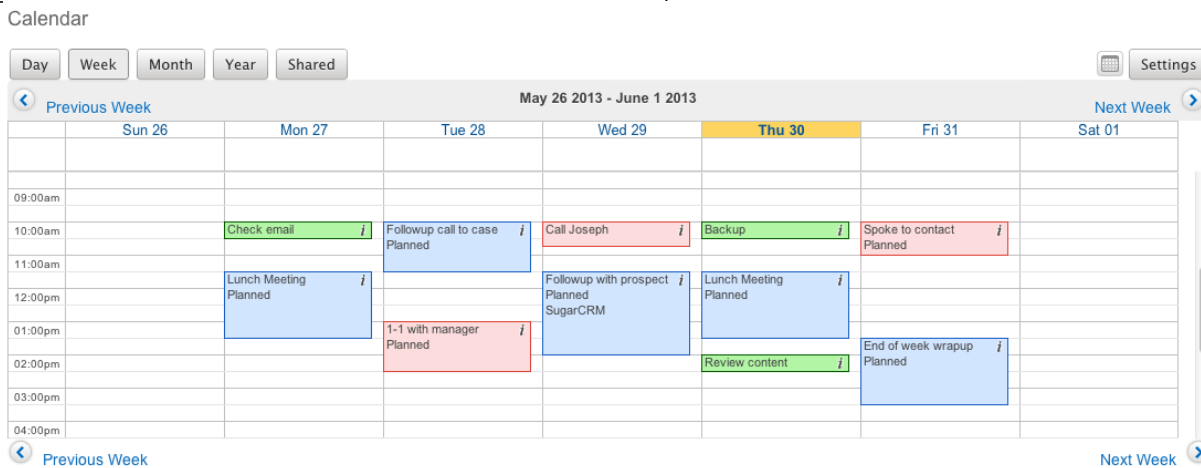
For more information on setting up, editing, and deleting recurring records, please refer to the Calls and Meetings documentation.

## Viewing via Calendar

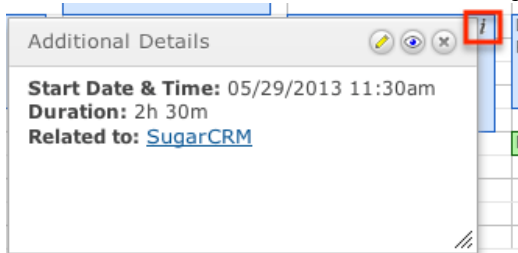
The Calendar module allows users to schedule, view, and manage various activities (Calls, Meetings, Tasks) in Sugar. The Calendar module can be accessed by clicking the Calendar module tab.

The three activity types are color-coded on the calendar as follows:

Module	Color
Calls	Red
Meetings	Blue
Task	Green



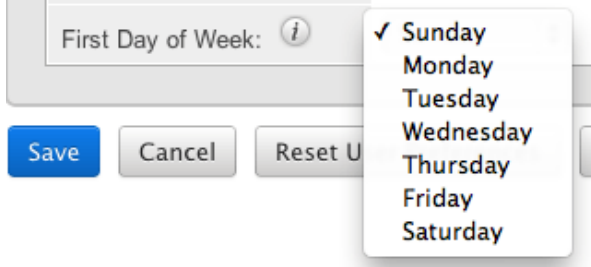
You can click the cell of an existing call or meeting to view the details via the Quick Create form. You can also click the "i" icon to the far right of the call record cell for a quick view of additional details (e.g. Subject, Start Date & Time, Duration, Related to, etc.) of any activity without opening up the record.



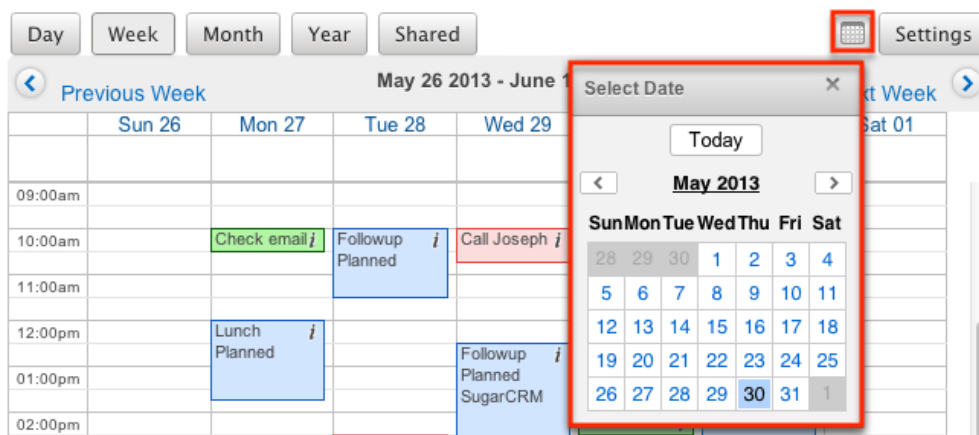
Please note that you will only be able to see activity records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

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:

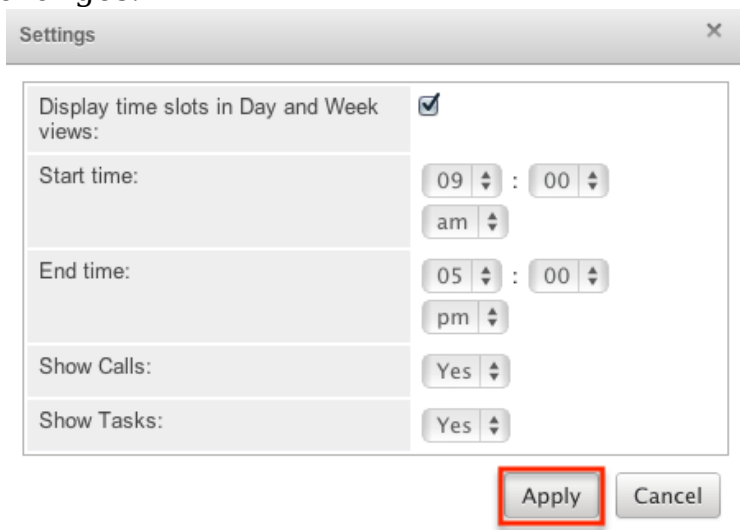
- Display time slots in Day and Week views : When this option is enabled, activities are displayed in their specified time cells when viewing a day or week via the calendar. If this option is disabled, all activities will appear as a list. This option is enabled by default.
- Start Time : The value set in this field represents the first time cell displayed

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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.



Settings

Display time slots in Day and Week views:

Start time: 09 : 00  
am

End time: 05 : 00  
pm

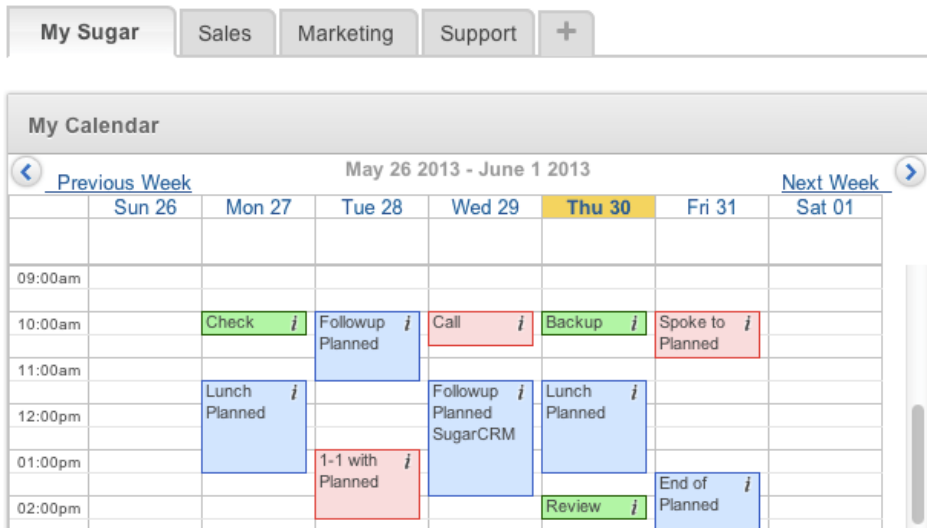
Show Calls: Yes

Show Tasks: Yes

Apply Cancel

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.



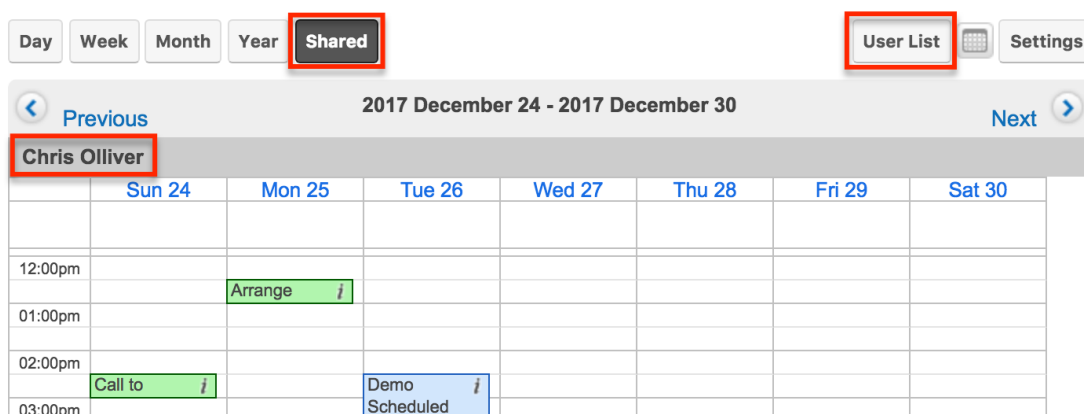


## Viewing Shared Calendar

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.

### Calendar



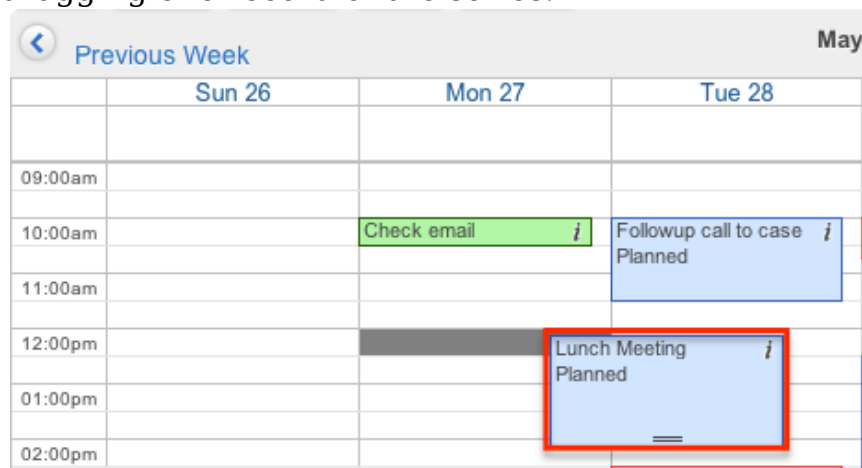
## Moving Scheduled Activities

The Sugar calendar allows for the start time and duration of meetings and calls to

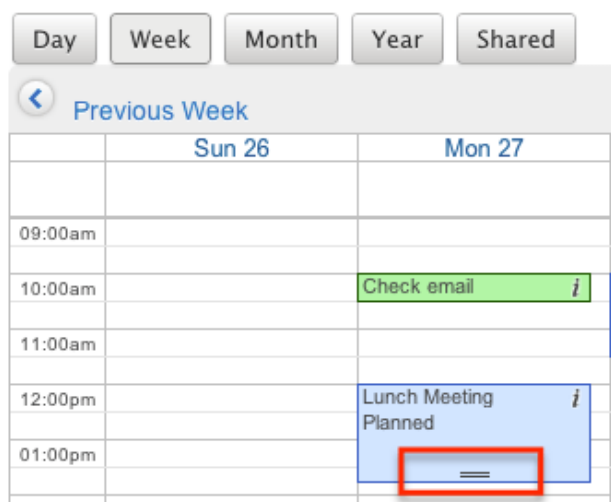
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be edited from the calendar, instead of having to directly edit the activity record via the module. The records that appear on the calendar can also be dragged and dropped to new locations to change the start date and time.

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.

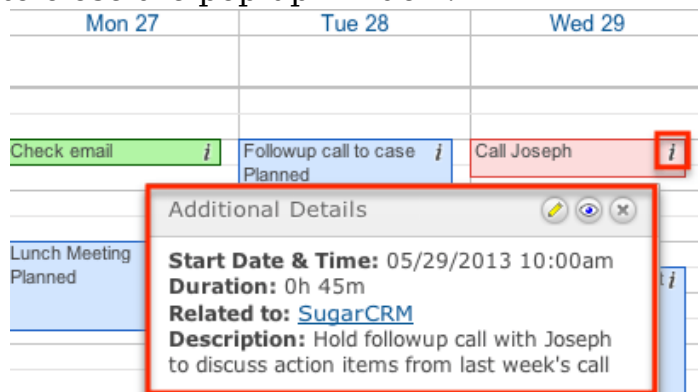


Note: Changing the meeting details with drag-and-drop does not send a system-generated update to the meeting invitees.

## 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.



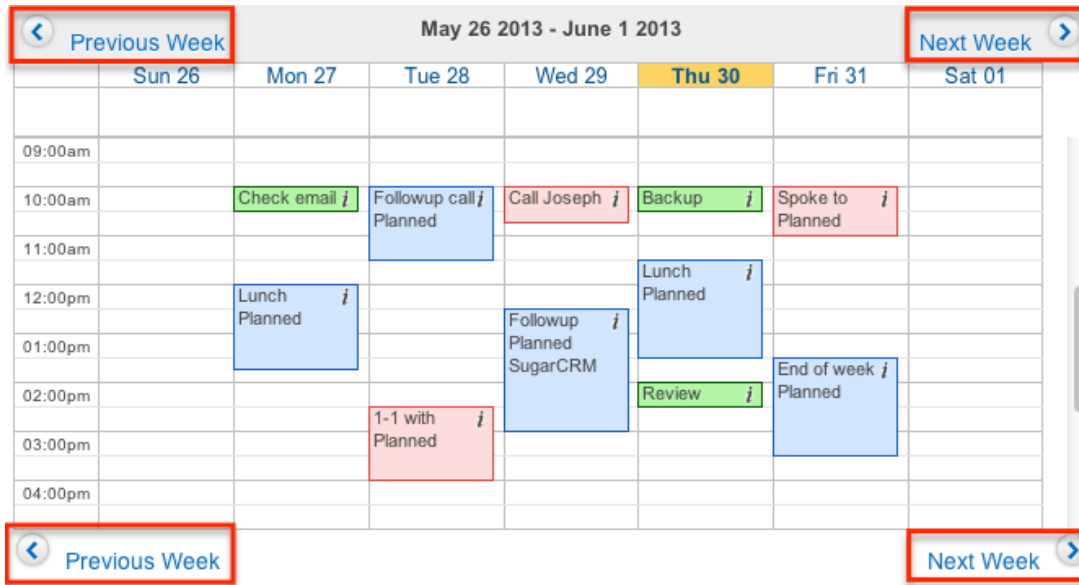
The resulting pop-up window will show the following fields by default:

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.



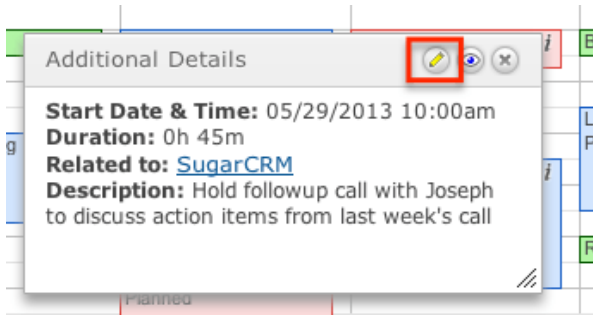
## Editing Activities

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.

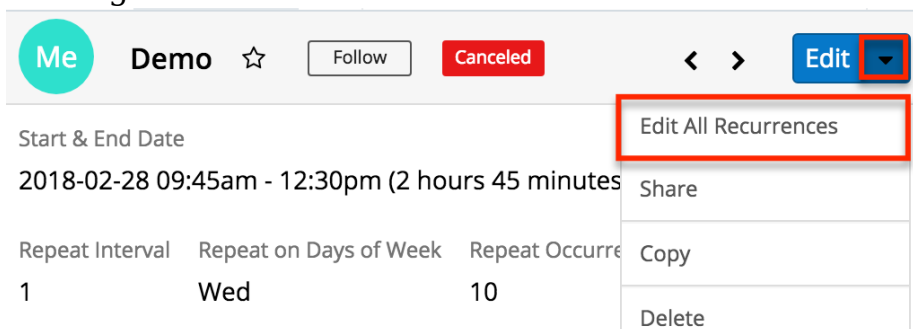


Please note that your ability to edit activities in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Edit options.

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.

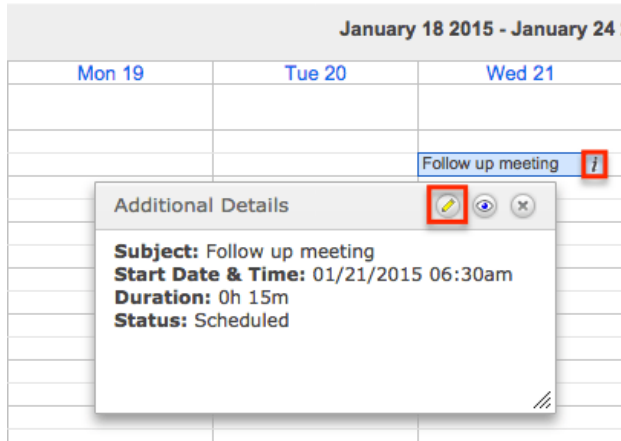
## Deleting Calls and Meetings via Calendar

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.

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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.

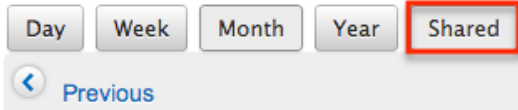
## Shared Calendar

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.

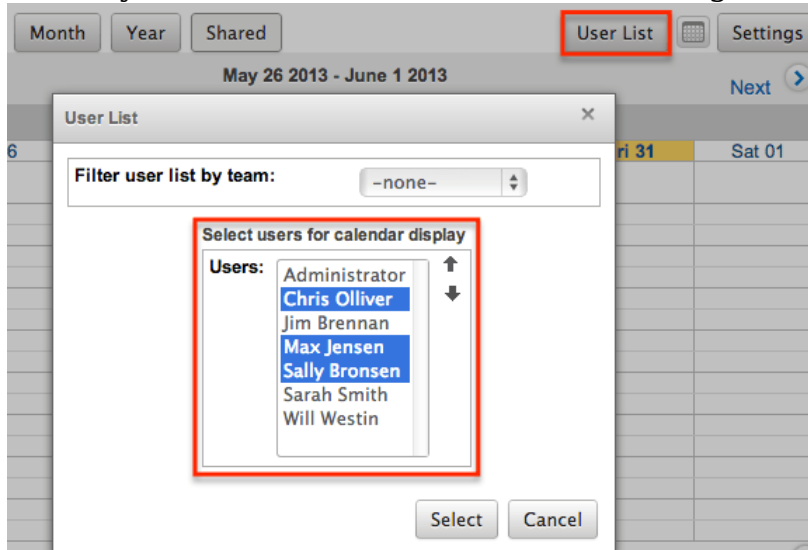
Use the following steps to enable the shared calendar:

1. Navigate to the calendar by clicking the Calendar module tab.
2. Click the Shared button on the upper left of the page.

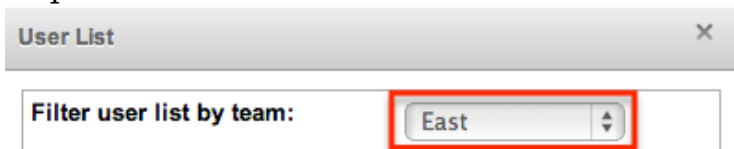
### Calendar



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.

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## 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.

## Integrating With IBM Lotus Notes



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Sugar allows you to sync activities in Sugar with your local installation of Lotus Notes using the Lotus Notes Plug-in. The plug-in also allows you to archive emails and sync contacts. All activities, including recurring ones, can be synced using the plug-in. When a meeting or call is synced from Lotus Notes to Sugar, the activity will appear on the Sugar calendar, but will not be editable via Sugar and only viewable.

For more information on using the Lotus Notes Plug-in, please review the Sugar Plug-in for Lotus Notes User Guide.

Last Modified: 2018-01-03 22:32:38

## 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. 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.
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

	<p>equal "None", the number of units in the "Repeat Type" field that should pass between recurrences, for example:</p> <ul style="list-style-type: none"> <li>• Every three days : Repeat Type = "Daily"; Repeat Interval = "3"</li> <li>• Every other week : Repeat Type = "Weekly"; Repeat Interval = "2"</li> <li>• Each year : Repeat Type = Yearly; Repeat Interval = "1"</li> </ul>
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.
Viewing Calls Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Dashlets Viewing via Activity Streams Viewing via Preview Viewing via Reports	The Viewing Records section describes the various methods of viewing call records, including via the Calls list view and record view, the Recently Viewed menu in the Calls module tab, list view dashlets showing call information, activity stream entries concerning call updates or where a user mentions a call, previewing calls in the right-hand side panel, and reports displaying call data.
Searching for Calls Global Search List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to the two searching methods for locating calls: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Calls module.
Calls List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview Record Actions Menu More Calls	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.

Activity Stream Dashboards	
Calls 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 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 Menu section of this page.
Editing Calls Editing Inline via Record View Editing via Record View Editing Inline via Subpanels Editing Inline via List View Mass Editing via List View Editing Fields	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 Editing Fields section provides instructions for modifying the different field types available in Sugar records.
Deleting Calls Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted calls, including via the Calls record view, an individual record's Actions menu on the Calls list view, and the Mass Actions menu on the list view.
Exporting Calls	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of calls and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).
Favoriting Calls Favoriting via List View Favoriting via Record View Favoriting via Subpanel	The Favoriting Records section describes the various methods of marking calls as favorites, including via the Calls list view, Calls record view, or any Calls subpanel appearing on the record view of a related module. Favoriting a call allows you to easily

	access it from list views, dashlets, or the Calls module tab.
Following Calls Following via List View Following via Record View	The Following Records section describes the various methods of marking calls as "Following" including via the Calls list view and record view. Following a call causes its activity stream updates to be included on your Home page and Calls list view activity streams so that you can easily keep up with changes and user posts on the record.
Sharing Calls	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the call record. If the recipient is logged into Sugar, clicking the link will bring them directly to the call's record view.

## Call Menus

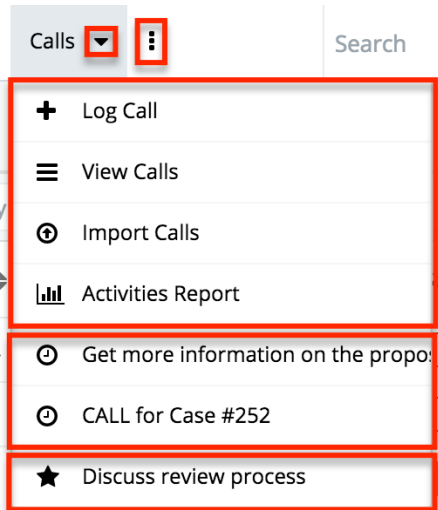
The Calls module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Calls-specific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







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.

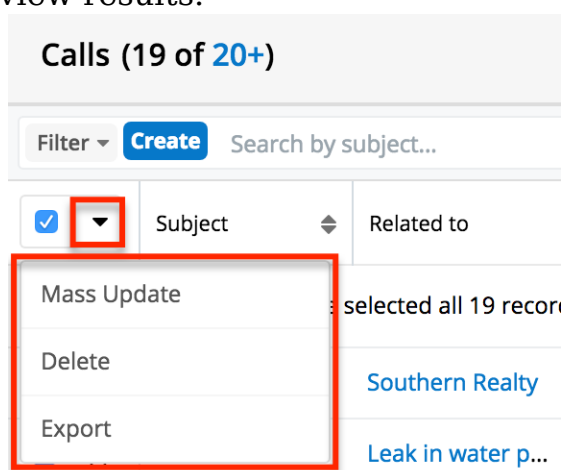
## List View Menus

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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.



<input type="checkbox"/>	<input type="checkbox"/>	Subject	Related to	Start Date	Status	Direction		
<input type="checkbox"/>	☆	Get more infor...	Southern Realty	2018-01-04 12:30pm	Scheduled	Outbound		
<input type="checkbox"/>	☆	CALL for Case ...	Leak in water p...	2017-12-19 05:40pm	Scheduled			
<input type="checkbox"/>	☆	CALL for Case ...	Leakage in cable	2017-12-19 05:...	Held			
<input type="checkbox"/>	☆	Discuss review ...	B.C. Investing I...	2018-08-27 04:...	Canceled			
<input type="checkbox"/>	☆	Get more infor...	EEE Endowme...	2018-04-09 07:...	Held			

- Edit
- Close
- Follow
- Delete

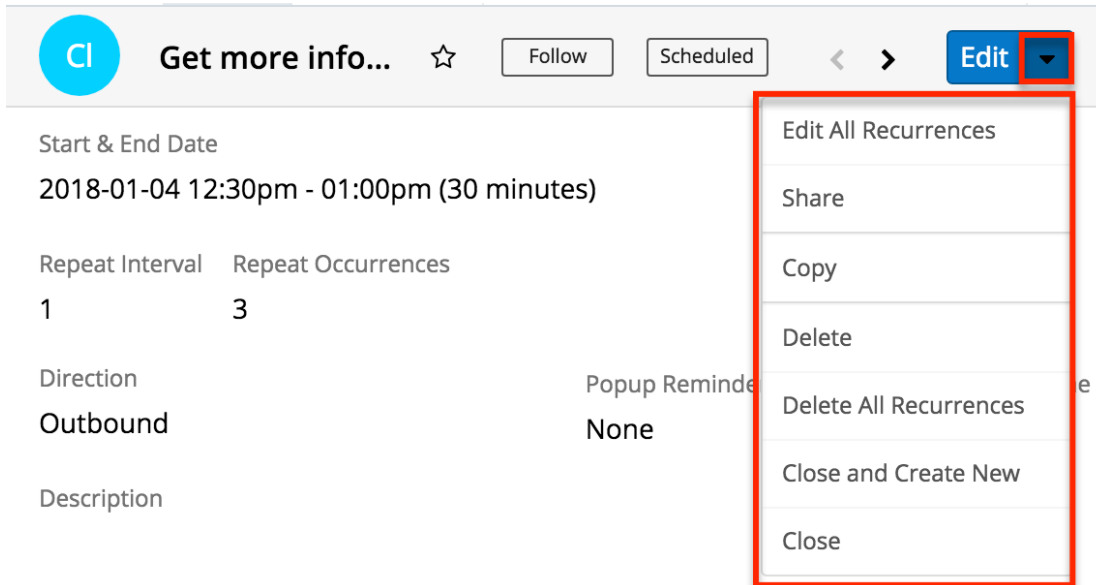
The list view's Record Actions menu allows you to perform the following operations:

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:

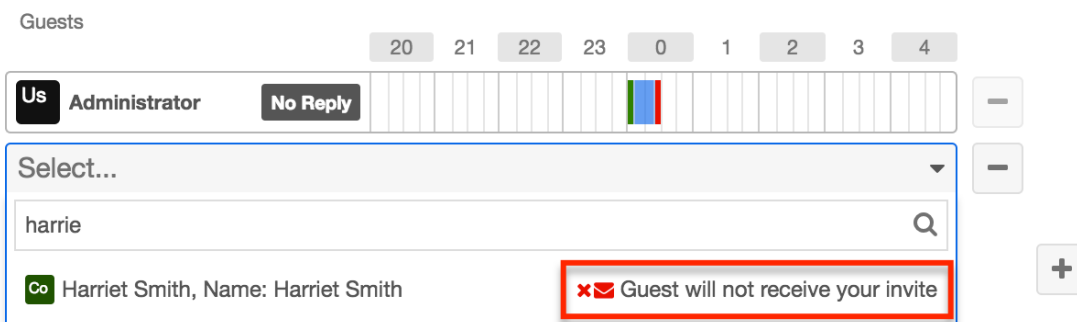
Menu Item	Description
Edit	Edit this call
Edit All Recurrences	Edit this call and all other call records in this call's series Note: Shown only for calls that are one in a recurring series
Share	Share a link to this call via email
Copy	Duplicate this call to create a new call
Delete	Delete this call
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.



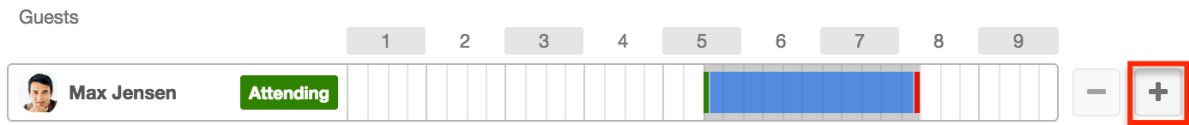
## Adding via the Guests Panel

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

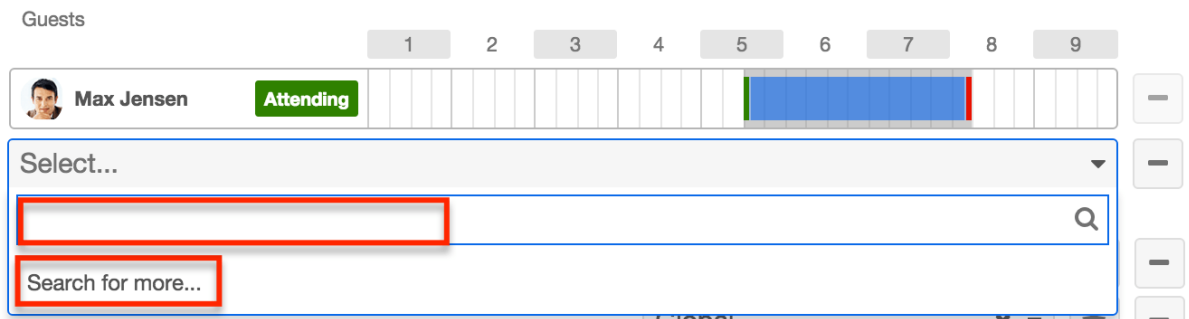
record.

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.

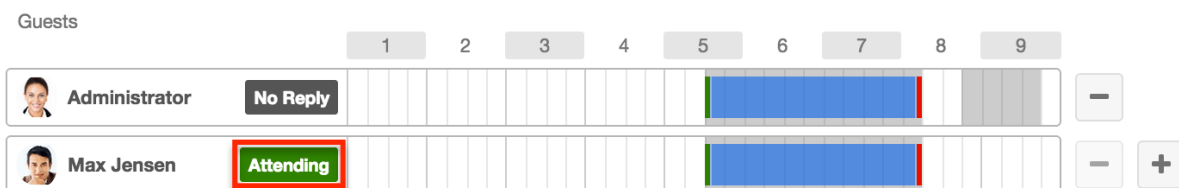
Note: The user in the "Assigned to" field on the call record cannot be removed from a call. To remove the assigned user from the guest list, re-assign the call to a different user first.



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

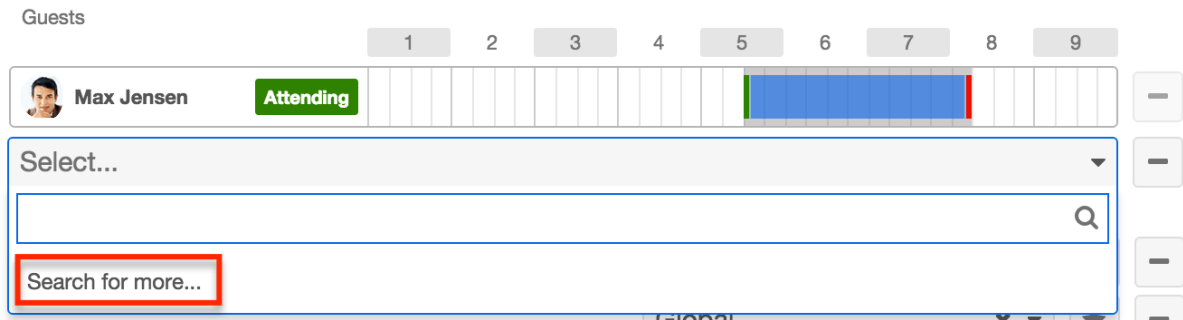
Use the following steps to create a new contact and add them as a call guest:

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.

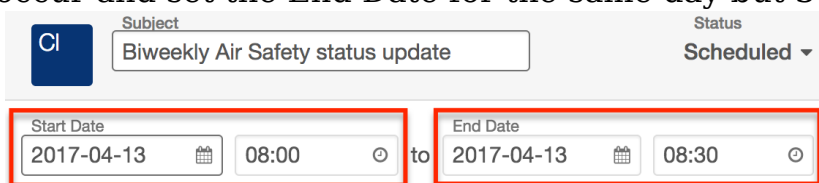
## Recurring Calls

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.

The screenshot shows a call scheduling form with the following fields: Subject (Biweekly Air Safety status update), Status (Scheduled), Start Date (2017-04-13), Start Time (08:00), End Date (2017-04-13), End Time (08:30), and Repeat Type (Weekly). The Repeat Type dropdown menu is highlighted with a red box.

4. Upon choosing a Repeat Type value, a new row of fields will appear on the form to gather the series information.

The screenshot shows the same call scheduling form as above, but with the Repeat Type dropdown menu expanded to show the 'Repeat Interval' (1) and 'Repeat on Days of Week' (Thu) fields. The Repeat Type dropdown menu is highlighted with a red box.

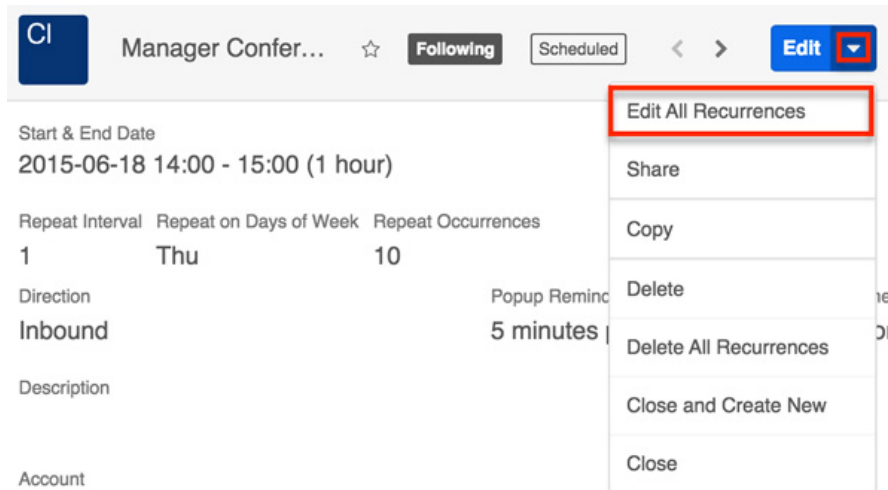
The fields displayed are dependent upon the values you select as you go. Please refer to the Call Fields section for complete details on the available options. To schedule a call that recurs every other Thursday until the end of the 2017 calendar year, set the following values:

- 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.

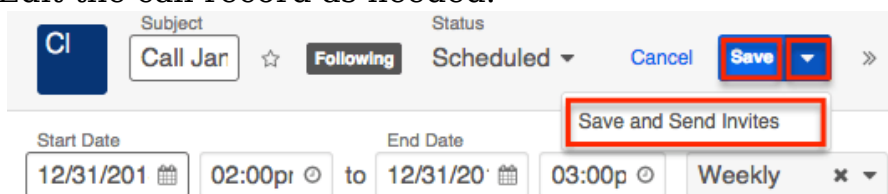
## Editing All Recurrences via Record View

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.

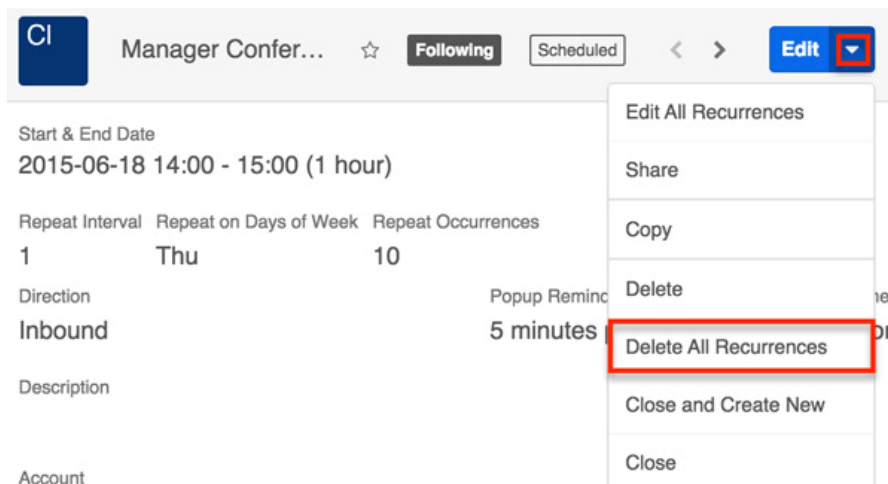


4. Then click on "Save" or "Save and Send Invites" to apply the changes to all held and unheld calls in the series.

## 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".

The screenshot shows a list view of calls in SugarCRM. At the top, there is a filter set to 'My Calls' and a search bar. The table has columns for Subject, Status, Start Date, and Related to. The first two rows are 'Call Jane' and 'Manager Confe...', both scheduled for 12/22/2014. The third row is 'Call Jane' scheduled for 01/31/2015, with 'Arts & Cra' as the related entity. The actions menu for this row is open, showing options: Edit, Close, Unfollow, Delete, and Delete All Recurrences. The 'Delete All Recurrences' option is highlighted with a red box.

	Subject	Status	Start Date	Related to	Actions
<input type="checkbox"/>	Call Jane	Scheduled	12/22/2014 1:30...		Eye icon, dropdown
<input type="checkbox"/>	Manager Confe...	Scheduled	12/22/2014 11:3...		Eye icon, dropdown
<input type="checkbox"/>	Call Jane	Scheduled	01/31/2015 1:3...	Arts & Cra	Eye icon, dropdown (open)
<input type="checkbox"/>	Call Jane	Scheduled	01/24/2015 1		Edit
<input type="checkbox"/>	Call Jane	Scheduled	01/17/2015 1		Close
<input type="checkbox"/>	Call Jane	Scheduled	01/10/2015 1		Unfollow
<input type="checkbox"/>	Call Jane	Scheduled	01/03/2015 1		Delete
<input type="checkbox"/>	Call Jane	Scheduled	02/14/2015 1		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

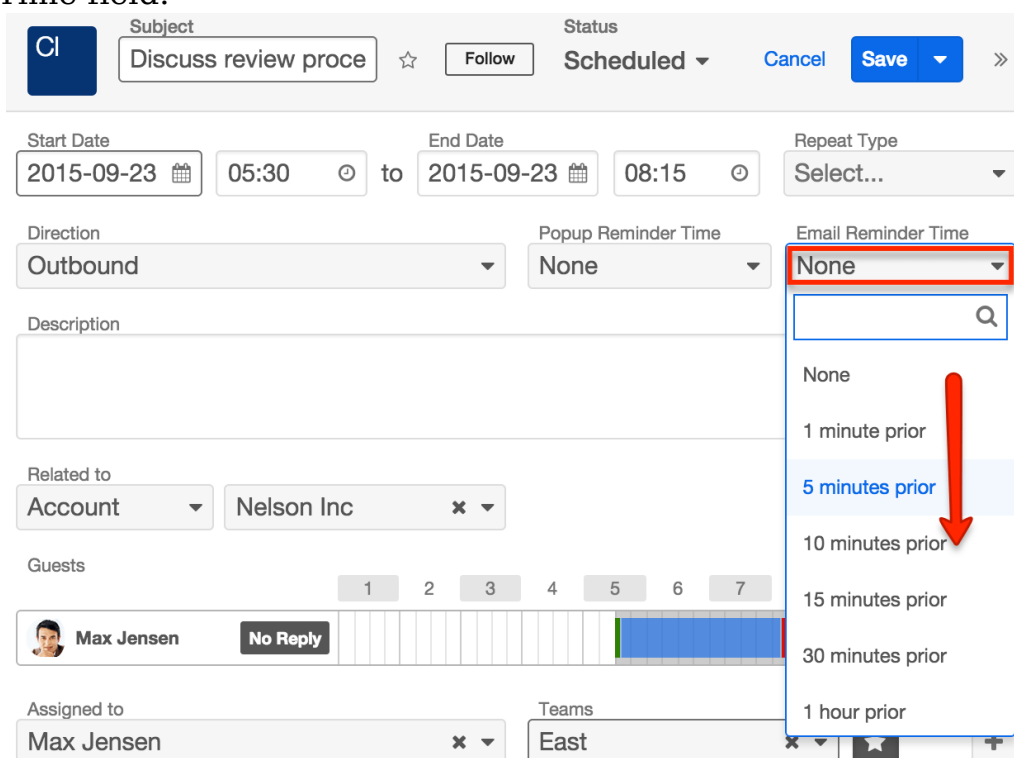
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Note: The instance's outbound mail server must be configured via Admin > Email Settings in order for email reminders to be sent out. For more information on setting up the system email settings, please refer to the Email documentation in the Administration 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:



The screenshot shows the Sugar CRM interface for editing a call record. The 'Email Reminder Time' dropdown menu is open, showing options: None, 1 minute prior, 5 minutes prior, 10 minutes prior, 15 minutes prior, 30 minutes prior, and 1 hour prior. A red arrow points to the '5 minutes prior' option. The 'None' option is highlighted with a red box. The background shows the call record details for 'Discuss review proce' on '2015-09-23' from '05:30' to '08:15'. The call is assigned to 'Max Jensen' and is part of the 'East' team.

## 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:

Subject: Discuss review proce

Status: Scheduled

Start Date: 2015-09-23 05:30 to End Date: 2015-09-23 08:15

Direction: Outbound

Popup Reminder Time: None

Description:

Related to: Account Nelson Inc

Guests: 1 2 3

Assigned to: Max Jensen

## Closing Calls

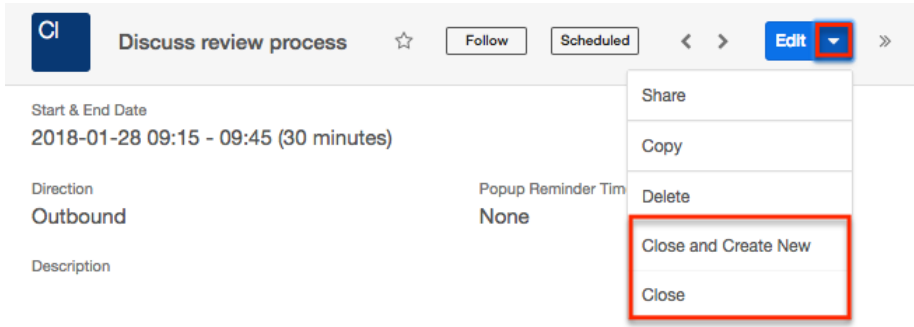
Once a call has taken place, a user can close the call record, which changes the call's status to "Held". The "Close" option only appears for meetings that are considered open, or not "Held". Open calls are shown in the Planned Activities dashlet on the record view of related records and guests (e.g. 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:

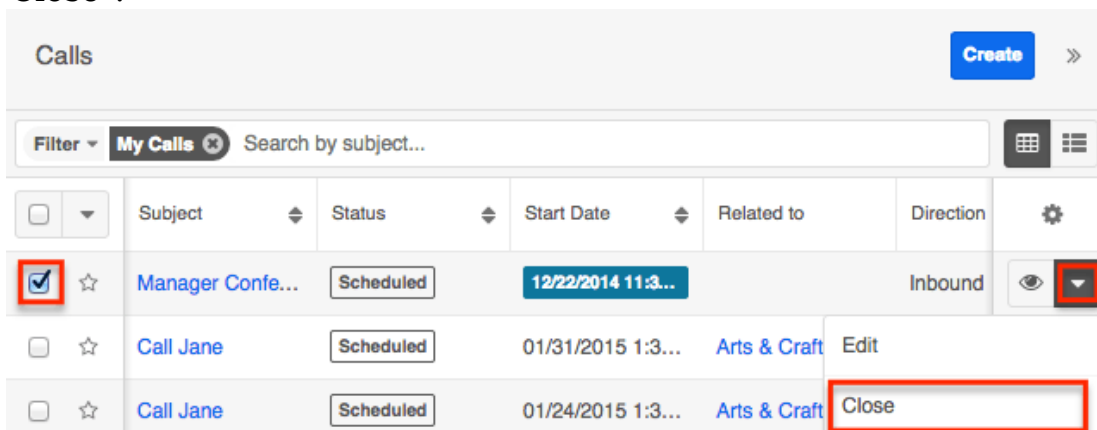
- Close : Instantly changes the call's status to "Held" and displays a Success message.
- Close and Create New : Instantly changes the call's status to "Held", displays a Success message, and opens a quick-create drawer for a new call record with the same values, guests, relationships. and other field 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.



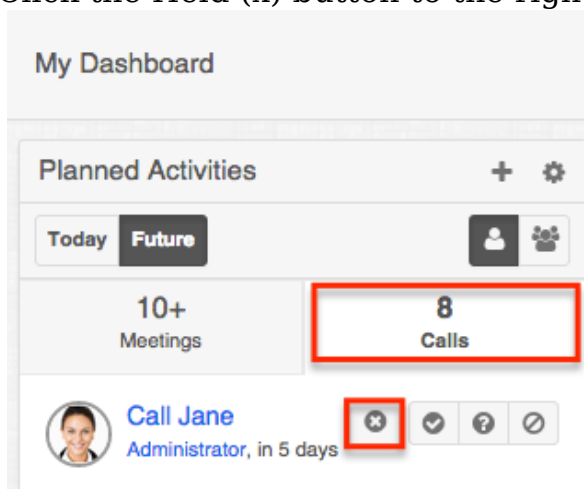
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## Closing via Dashlet

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".

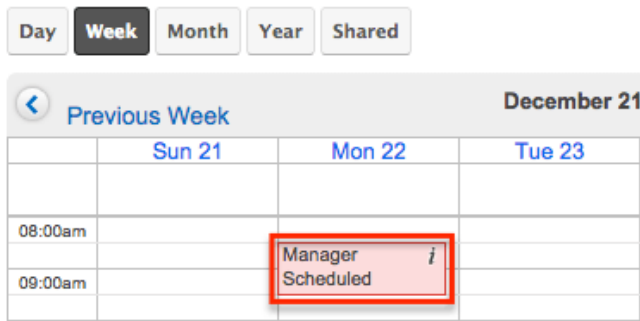
## Calendar Module and Calls

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.

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## 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.

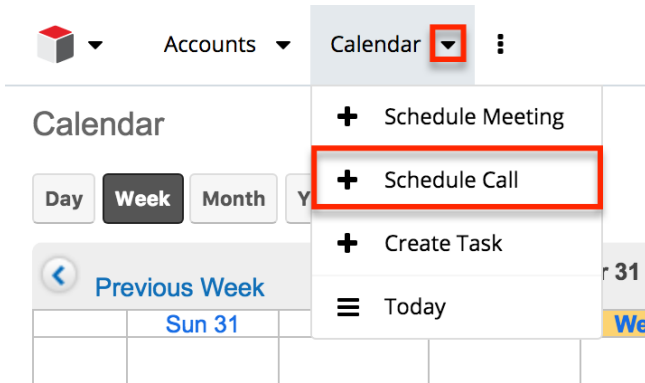


For more information on viewing and managing calls on the calendar, please refer to the Calendar documentation. Users also have the ability to view other user's scheduled activities via the shared calendar option. For more information on viewing the shared calendar, please refer to the Calendar documentation.

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

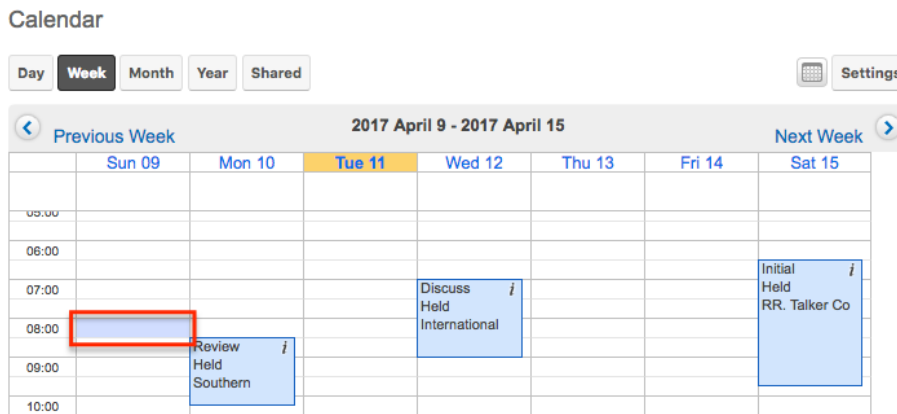
There are two ways to create calls in the Calendar module. The first method is to create a call via the Schedule Call option in the Calendar module tab. This will open up the call's record view in edit mode to create a new call record. For more information on creating calls via the Calls module, please refer to the User Interface documentation and the various call-specific sections above.



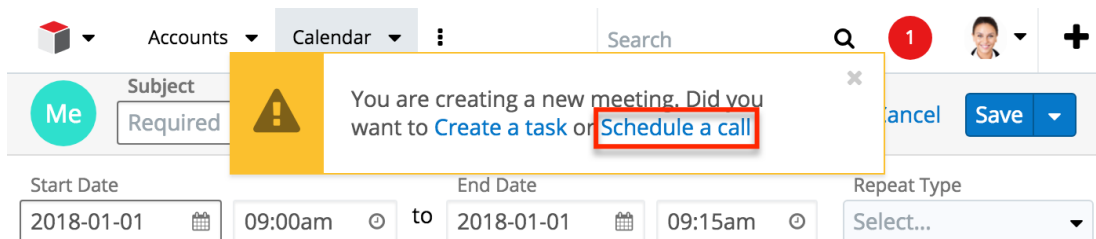
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The second method is to create the call directly within the Sugar calendar. For more information on navigating and viewing the calendar, please refer to the Calendar documentation. Use the following basic steps to create a call via the Calendar module:

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.



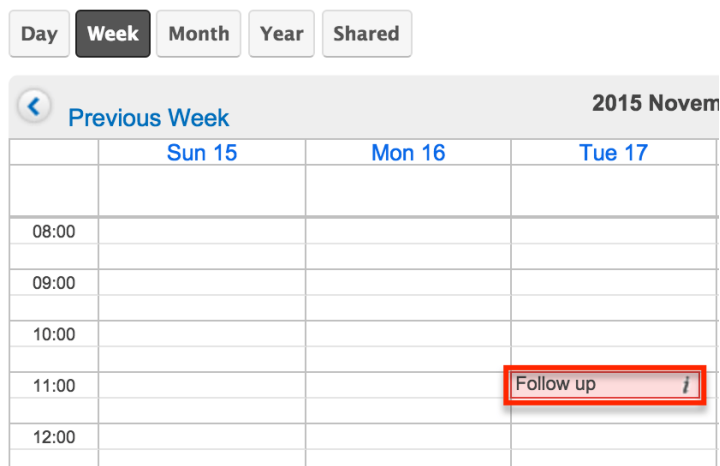
4. You will now see the call's record view in edit mode so that you can create a new call record. Complete the call's fields as described in the User Interface documentation and the various call-specific sections above.

## Editing via Calendar

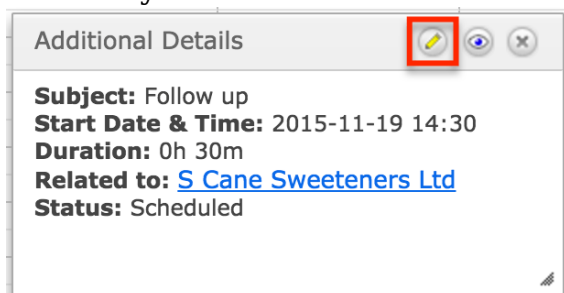
Once calls are scheduled in Sugar, they appear in the assigned user's calendar based on the specified due date and time. You can click the Info (i) icon on the call's calendar cell to view additional information about the call.

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## Calendar



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.

Last Modified: 2018-05-10 17:50:32

## 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

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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 Meetings 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. 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.
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	<p>Shown when Repeat Type does not equal "None", the number of units in the "Repeat Type" field that should pass between recurrences, for example:</p> <ul style="list-style-type: none"> <li>• Every three days : Repeat Type = "Daily"; Repeat Interval = "3"</li> <li>• Every other week : Repeat Type = "Weekly"; Repeat Interval = "2"</li> <li>• Each year : Repeat Type = Yearly; Repeat Interval = "1"</li> </ul>
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).

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 l...	2018-08-27 04:...	Canceled	Outbound	▼

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 Meetings

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 the Working With Meetings table describe Meetings-specific behaviors and functionality.

Content Link	Description
Creating Meetings Basic Meeting Creation Creating via Quick Create Creating via Subpanels Creating via Duplication Importing Meetings	The Creating Records section covers the various methods of creating new meeting records, including via the Create button in the Meetings module, the Quick Create menu on the upper right of every Sugar page, via the Meetings subpanel on related module records, duplication of an existing meeting record, and importing a list of meetings into Sugar using a .csv spreadsheet.
Viewing Meetings 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 meeting records, including via the Meetings list view and record view, the Recently Viewed menu in the Meetings module tab, list view dashlets showing meeting information, activity stream entries concerning meeting updates or where a user mentions a meeting, previewing meetings in the right-hand side panel, and reports displaying meeting data.
Searching for Meetings 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 meetings: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Meetings module.
Meetings 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	The List View section walks through the many elements of the Meetings List View layout, which contains a filterable list of all meeting 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 Meetings list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.

<p>Preview Record Actions Menu More Meetings Activity Stream Intelligence Pane</p>	
<p>Meetings 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</p>	<p>The Record View section walks through the many elements of the Meetings Record View layout, which contains detailed information about a single meeting record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Meetings record view are described in the Record View Actions Menu section of this page.</p>
<p>Editing Meetings Editing Inline via Record View Editing via Record View Editing Inline via Subpanels Editing Inline via List View Mass Editing via List View Editing Fields</p>	<p>The Editing Records section describes the various methods of editing existing meeting records, including inline via the Meetings record view, in full edit mode from the record view, inline via the Meetings subpanel on related module records, inline via the Meetings list view, and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.</p>
<p>Deleting Meetings Deleting via Record View Deleting via List View Mass Deleting via List View</p>	<p>The Deleting Records section describes the various methods of deleting unwanted meetings, including via the Meetings record view, an individual record's Actions menu on the Meetings list view, and the Mass Actions menu on the list view.</p>
<p>Exporting Meetings</p>	<p>The Exporting Records section provides an introduction to the export functionality which allows you to download a list of meetings and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).</p>
<p>Favoriting Meetings Favoriting via List View</p>	<p>The Favoriting Records section describes the various methods of</p>

<p>Favoriting via Record View Favoriting via Subpanel</p>	<p>marking meetings as favorites, including via the Meetings list view, Meetings record view, or any Meetings subpanel appearing on the record view of a related module. Favoriting a meeting allows you to easily access it from list views, dashlets, or the Meetings module tab.</p>
<p>Following Meetings Following via List View Following via Record View</p>	<p>The Following Records section describes the various methods of marking meetings as followed, including via the Meetings list view and record view. Following a meeting causes its activity stream updates to show on your Home page and Meetings list view activity streams so that you can easily keep up with changes and user posts on the record.</p>
<p>Sharing Meetings</p>	<p>The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the meeting record. If the recipient is logged into Sugar, clicking the link will bring them directly to the meeting's record view.</p>

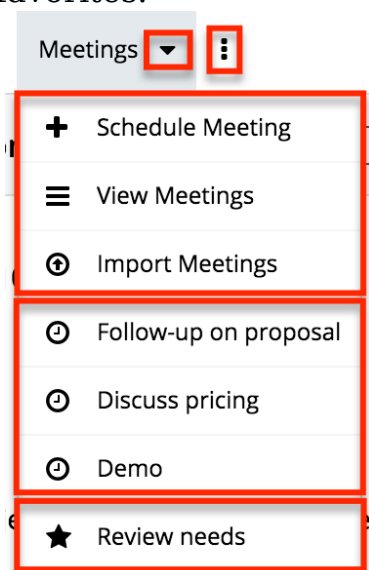
## Meeting Menus

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.

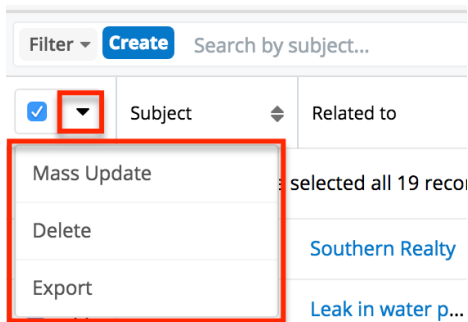
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## List View Menus

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.



<input type="checkbox"/>	<input type="checkbox"/>	Subject	Related to	Start Date	Status	Direction		
<input type="checkbox"/>	☆	Get more infor...	Southern Realty	2018-01-04 12:30pm	Scheduled	Outbound		
<input type="checkbox"/>	☆	CALL for Case ...	Leak in water p...	2017-12-19 05:40pm	Scheduled			
<input type="checkbox"/>	☆	CALL for Case ...	Leakage in cable	2017-12-19 05:...	Held			
<input type="checkbox"/>	☆	Discuss review ...	B.C. Investing I...	2018-08-27 04:...	Canceled			
<input type="checkbox"/>	☆	Get more infor...	EEE Endowme...	2018-04-09 07:...	Held			

- Edit
- Close
- Follow
- Delete

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

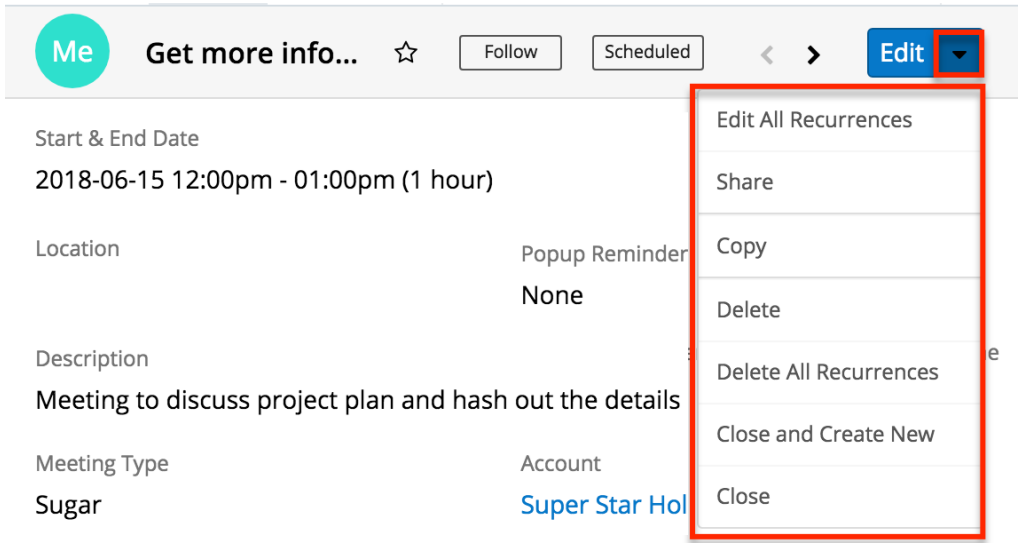
Menu Item	Description
Preview (Eye icon)	Preview this meeting in the intelligence pane
Edit	Edit this meeting
Close	Close this meeting Note: Shown only for meetings that do not have a status of "Held"
Follow	Follow this meeting
Delete	Delete this meeting
Delete All Recurrences	Delete this meeting and 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:

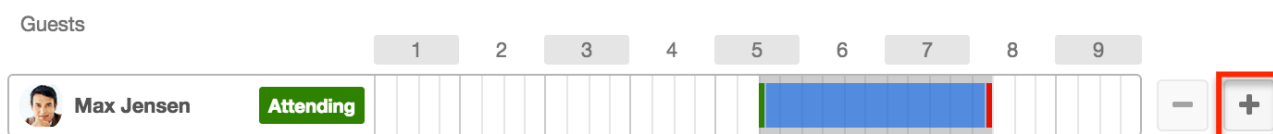
Automatic Guest	To Remove the Guest
The lead or contact in the "Related to" field, if any	This guest can be removed from the guest list at any time. If a lead or contact record is related to a meeting but is not on the guest list, then you will not see the meeting in the person's Meetings subpanel.
The 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:

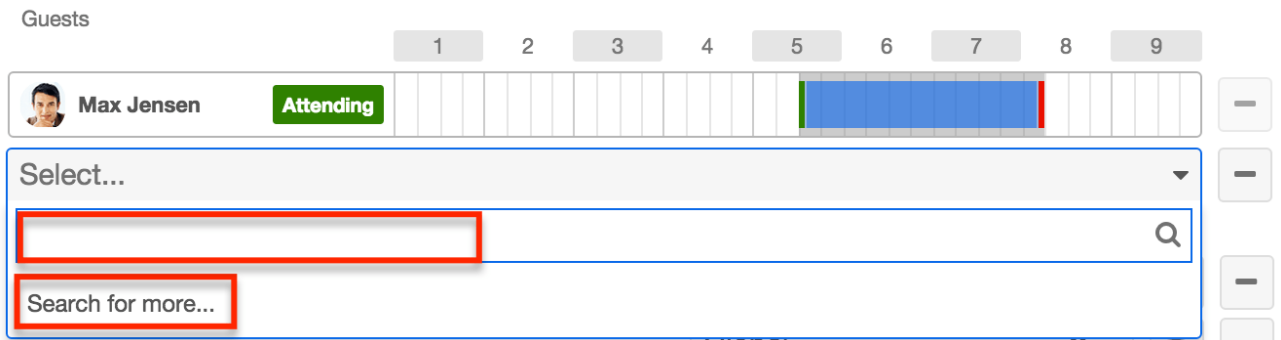
1. Navigate to the Meetings module and create a new record or edit an existing record.
2. Scroll to the Guests panel and click on the Add (+) button located on the far right.



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

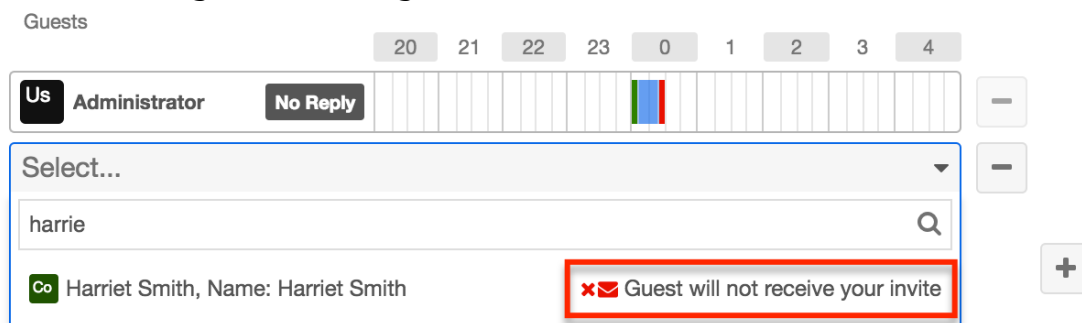
guest's row.

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.

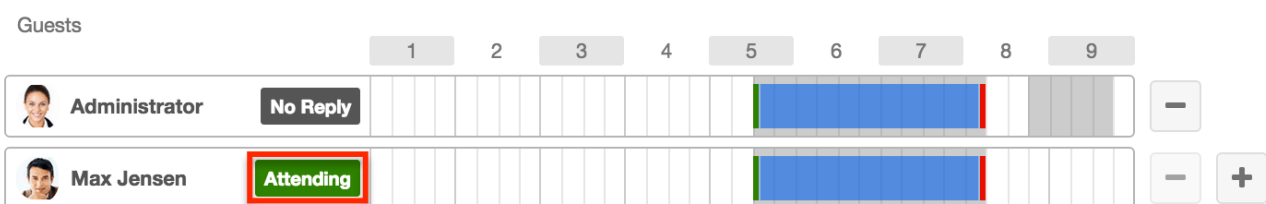


4. Click "Save" or "Save and Send Invites" if you would like Sugar to send email invitations to the guests.

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.

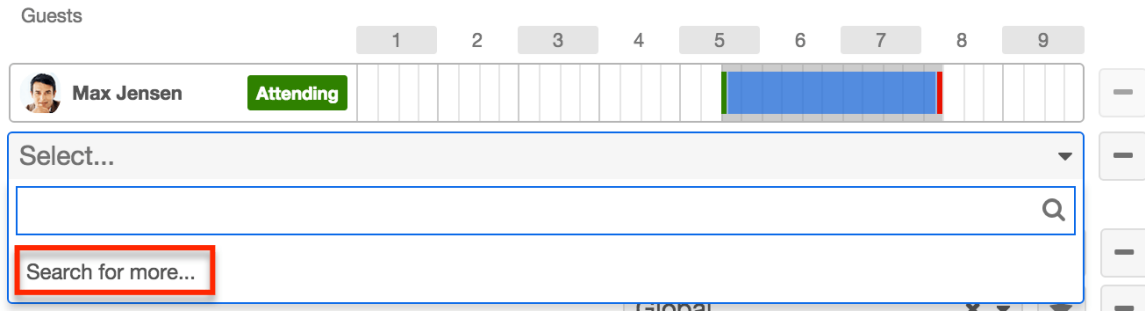


## Adding via Create a Guest

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

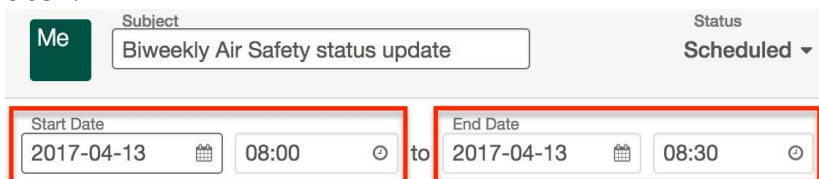
Meetings can be saved as recurring events so that users do not have to create individual meeting records for regularly occurring events. Recurrences may occur daily, weekly, monthly, or yearly. When a recurring meeting is saved, Sugar creates a series of individual meeting records so that all recurrences appear in the

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

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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.

The screenshot shows a meeting form with the following fields: Subject: "Biweekly Air Safety status update", Status: "Scheduled", Start Date: "2017-04-13", Time: "08:00", End Date: "2017-04-13", Time: "08:30". The "Repeat Type" dropdown menu is expanded, showing "Weekly" selected. The "Repeat Type" field is highlighted with a red box.

4. Upon choosing a Repeat Type value, a new row of fields will appear on the form to gather the series information.

The screenshot shows the same meeting form as above, but with additional fields for series information. The "Repeat Interval" is set to "1", "Repeat on Days of Week" is set to "Thu", "Repeat" is set to "Until", and "Repeat Until" is set to "yyyy-mm-dd". The "Repeat Type" dropdown menu is still expanded, showing "Weekly" selected. The "Repeat Interval" and "Repeat on Days of Week" fields are highlighted with a red box.

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:

- o Repeat Interval : 2
- o Repeat on Days of Week : Thu
- o Repeat : Until
- o Repeat Until : 2017-12-31

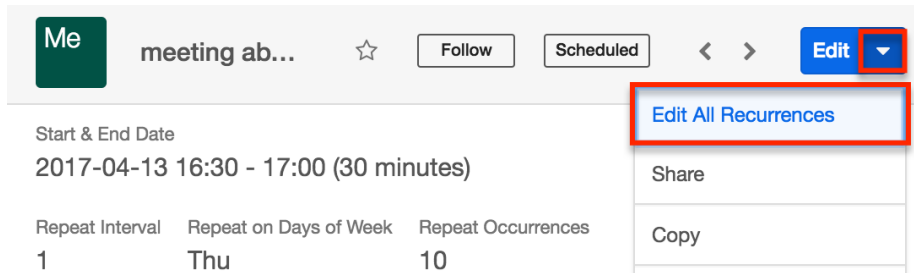
5. Confirm that the remaining fields and guests are configured appropriately.
6. Save the record and confirm that all recurrences appear as separate records in the Meetings module's list view.

## Editing All Recurrences via Record View

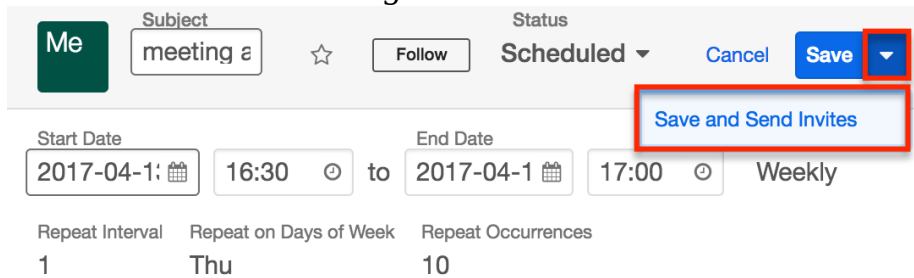
Recurring activities will display the option to edit all occurrences of the activity in the record's actions menu. This option will affect all of the meeting records in a series, even if some of the meetings have been closed and set to "Held". Use the following steps to edit all recurrences in a series 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.





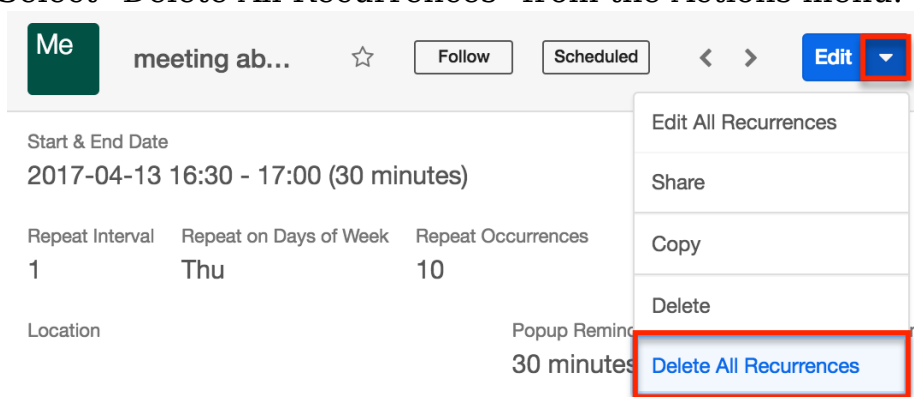
3. Edit the meeting record as needed.
4. Then click on "Save" or "Save and Send Invites" to apply the changes to all held and unheld meetings in the series.



## 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.

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## 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".

The screenshot shows a list view titled "Meetings (20 of 21+)" with a "Create" button and a search bar. The list has columns for Subject, Status, Start Date, and Related to. The first row is highlighted, and its actions menu is open, showing options like Edit, Close, Follow, Delete, and "Delete All Recurrences", which is highlighted with a red box.

	Subject	Status	Start Date	Related to	Actions
<input type="checkbox"/>	meeting about max	Scheduled	2017-06-15 16:...	Air Safety Inc	[Eye icon] [Dropdown arrow]
<input type="checkbox"/>	meeting about max	Scheduled	2017-06-08 16:	Edit	
<input type="checkbox"/>	meeting about max	Scheduled	2017-06-01 16:	Close	
<input type="checkbox"/>	meeting about max	Scheduled	2017-05-25 16:	Follow	
<input type="checkbox"/>	meeting about max	Scheduled	2017-05-18 16:	Delete	
<input type="checkbox"/>	meeting about max	Scheduled	2017-05-11 16:	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.



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## 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:

The screenshot shows a meeting record for 'Follow-up on proposal' on 2018-04-15 from 08:15am to 10:15am. The 'Email Reminder Time' dropdown menu is open, showing options: None, 1 minute prior, 5 minutes prior, 10 minutes prior (highlighted), 15 minutes prior, 30 minutes prior, and 1 hour prior. The 'Popup Reminder Time' is set to 'None'. The meeting description is 'Meeting to discuss project plan and hash out the details of implementation'. The account is 'White Cross Co'. The guest list includes 'Shanita Co...' (No Reply) and 'Sarah Smith' (Attending).

## 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:



The screenshot displays the 'Follow-up on proposal' meeting record. The 'Popup Reminder Time' dropdown menu is open, with '1 minute prior' selected. Other options include 'None', '5 minutes prior', '10 minutes prior', '15 minutes prior', '30 minutes prior', and '1 hour prior'. The meeting is scheduled for 2018-04-15 from 08:15am to 10:15am. Guests listed are Shanita Co... (No Reply) and Sarah Smith (Attending).

## Closing Meetings

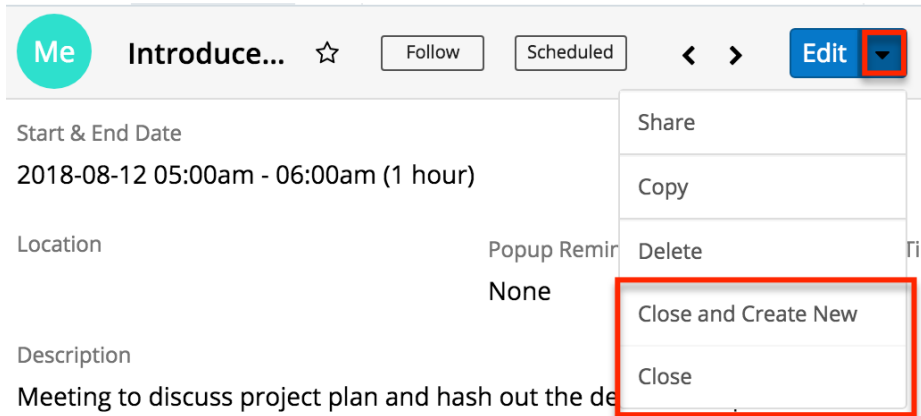
Once a meeting has taken place, a user can close the meeting record, which changes the meeting's status to "Held". The "Close" option only appears for meetings that are considered open, or not "Held". Open meetings are shown in the Planned Activities dashlet on the record view of related records and 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".



☆	Follow-up on p...	First National S...	2018-09-26 03:...	Schedu	👁️ ▼
☆	Discuss pricing	J.K.M. Corp (HA)	2018-07-14 0	Edit	
☆	Review needs	Tri-State Medic...	2018-01-27 1	Close	
☆	Demo	Dirt Mining Ltd	2018-06-30 0	Follow	
☆	Discuss pricing	AB Drivers Limi...	2018-05-23 0	Delete	

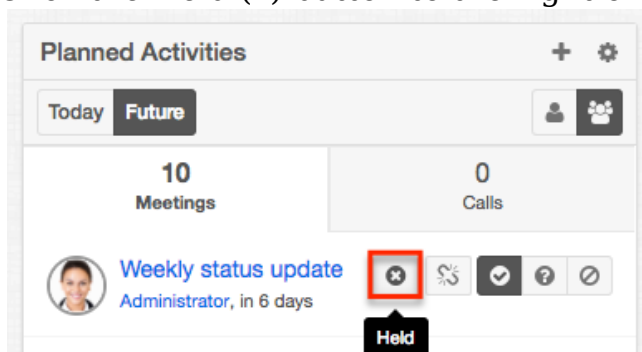
Sugar instantly changes the meeting's status to "Held" and displays a Success message.

## 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

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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.



December 14 2014 - December 20 2014		
Tue 16	Wed 17	Thu 18
	Meeting with Jane i Scheduled	

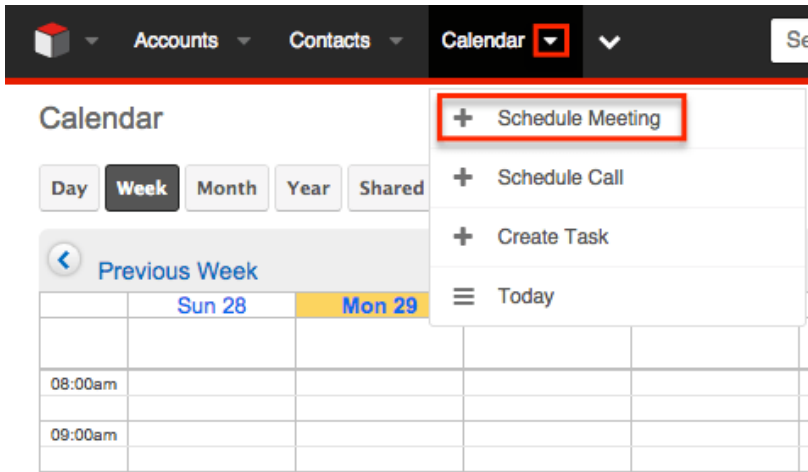
For more information on viewing and managing meetings on the calendar, please refer to the Calendar documentation. Users also have the ability to view other user's scheduled activities via the shared calendar option. For more information on viewing the shared calendar, please refer to the Calendar documentation.

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

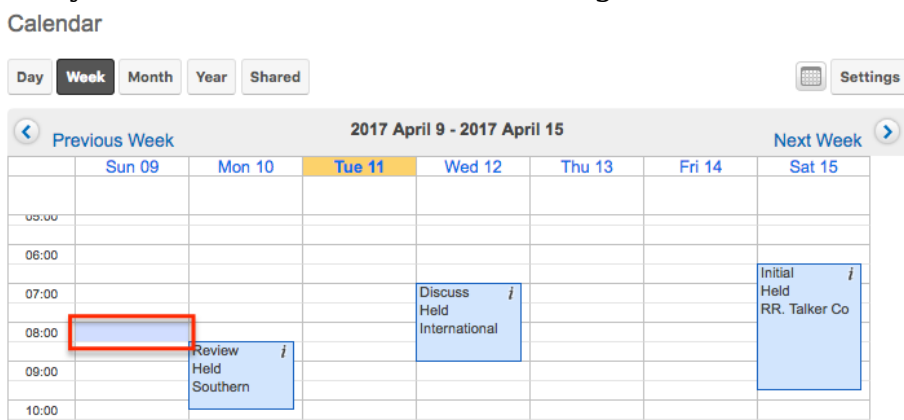
There are two ways to create meetings from the Calendar module. The first method is via the Schedule Meeting option in the Calendar's module tab. This will open the meeting's record view in edit mode so that you can create a new meeting record. For more information on creating meeting records, please refer to the User Interface documentation and the various meeting-specific sections above.



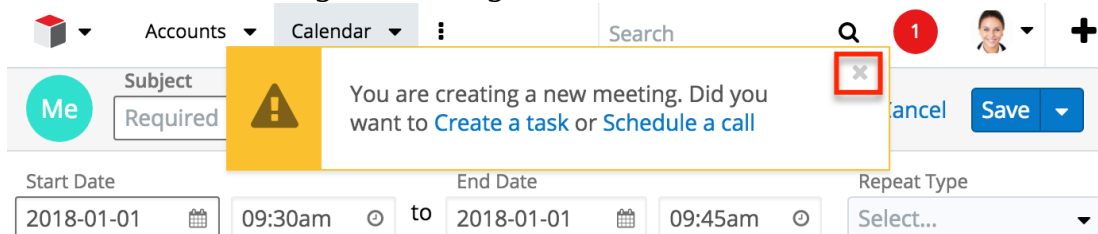


The second method is to create the meeting directly within the Sugar calendar. For more information on navigating and viewing the calendar, please refer to the Calendar documentation. Use the following basic steps to create a meeting via the Calendar module:

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.



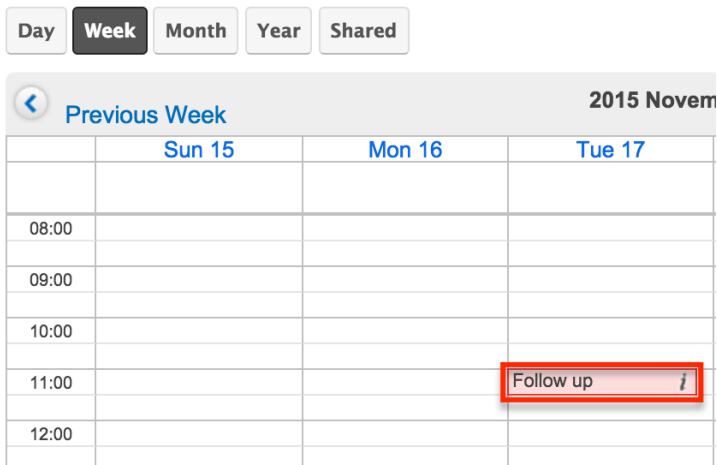
4. You will now see the meeting's record view in edit mode so that you can create a new meeting record. Complete the meeting's fields as described in the User Interface documentation and the various meeting-specific sections above.

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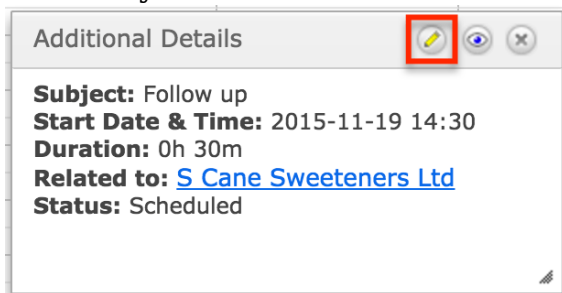
## Editing via Calendar

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.

### Calendar



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: 2018-01-03 23:52:09

## 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 or a system account

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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 this 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.

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## 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:

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
Date	The date the message was sent, received, or modified, depending on the email's status and direction	<ul style="list-style-type: none"> <li>• Archived (incoming) : The date the email was received</li> <li>• Archived (outgoing) : The date the email was sent</li> <li>• Draft : The last modified date</li> </ul>
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.
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	<ul style="list-style-type: none"> <li>• To : The email address(es) that the email was or will be sent to</li> <li>• Cc : The email address(es) that the email was or will be copied to</li> <li>• Bcc : The email address(es) that the</li> </ul>

		<p>email was or will be blind copied to</p> <p>For more information, please refer to the Working With Recipient Fields section of this page.</p>
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	<p>The state of the message:</p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• 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.</li> </ul>	Sugar does not differentiate between sent and received emails via the Status field, but users can find messages by direction using the "My Sent" and "My Received" filters in the Emails list view.
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	

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## 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
<a href="#">Emailing Sugar Records</a> <a href="#">Emailing via Emails Module</a> <a href="#">Emailing via Quick Create</a>	<p>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.</p> <p>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.</p>
<a href="#">Viewing Emails</a> <a href="#">Viewing via List View</a> <a href="#">Viewing via Record View</a> <a href="#">Viewing via Recently Viewed</a> <a href="#">Viewing via Dashlets</a> <a href="#">Viewing via Activity Streams</a> <a href="#">Viewing via Preview</a> <a href="#">Viewing via Reports</a>	<p>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.</p>
<a href="#">Searching for Emails</a> <a href="#">Global Search</a> <a href="#">List View Search</a> <a href="#">Creating a Filter</a> <a href="#">Saving a Filter</a>	<p>The Searching for Records section provides an introduction to the two searching methods for locating emails: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Emails module.</p> <p>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</p>

	<p>message. To restrict search results by the Group Inbound account that received them, create a filter using the "Inbound Account" field.</p>
<p>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</p>	<p>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</p>
<p>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</p>	<p>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.</p>
<p>Editing Emails  Editing Inline via Record View  Editing via Record View  Editing Inline via Subpanels  Editing Inline via List View  Mass Editing via List View  Editing Fields</p>	<p>The Editing Records section describes the various methods of editing existing email records, including inline via the Emails record view, in full edit mode on the record view, inline via the Emails subpanel on related module records, inline via the Emails list view, and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.</p> <p>Note: Users cannot edit an email's content, dates, or recipients once it has</p>



	<p>been archived. Users with appropriate role permissions can, however, edit the Assigned To, Teams, Related To, and Tags fields for archived emails.</p>
<p>Deleting Emails  Deleting via Record View  Deleting via List View  Mass Deleting via List View</p>	<p>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.</p> <p>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.</p>
<p>Exporting Emails</p>	<p>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).</p>
<p>Favoriting Emails  Favoriting via List View  Favoriting via Record View  Favoriting via Subpanel</p>	<p>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.</p>

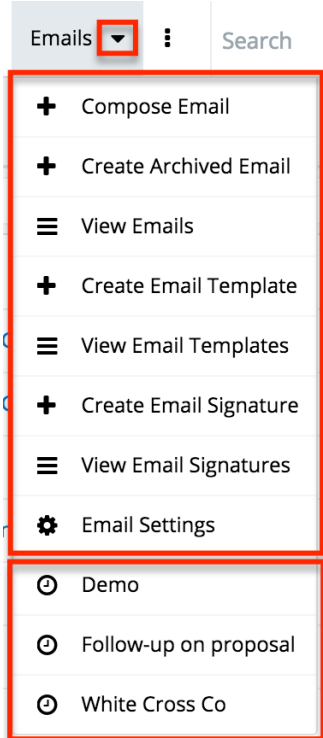
## Email Menus

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.

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## 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.

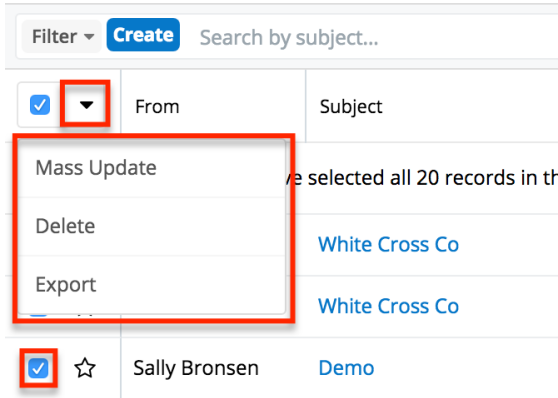
## List View Menus

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.



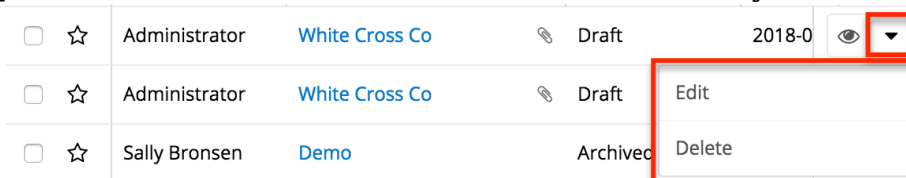


The Mass Actions menu allows you to perform the following operations:

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.



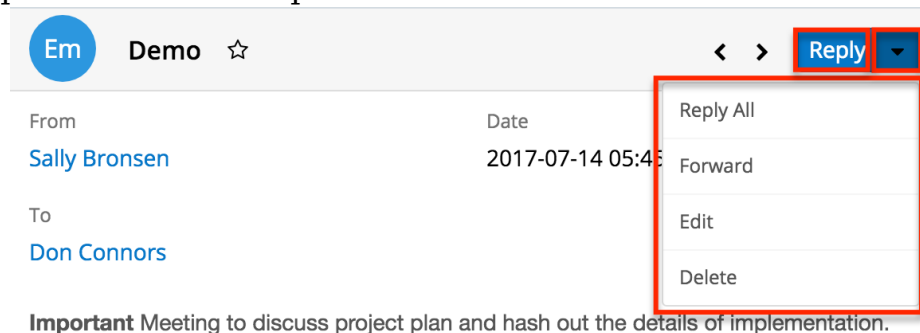
The list view's Record Actions menu allows you to perform the following operations:

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

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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 Advanced Workflow 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:

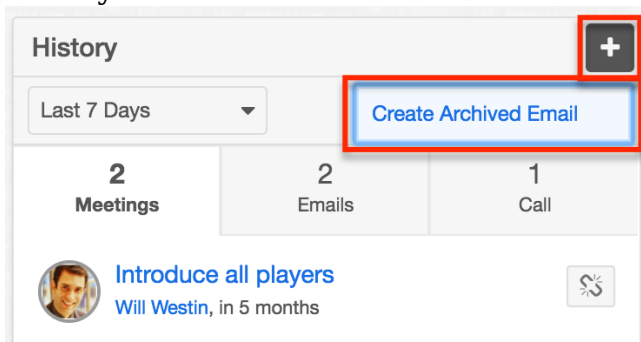
- Manually creating an archived email via "Create Archived Email"
- Composing and sending an email from Sugar via the Emails module
- Sending an email campaign via the Campaigns module
- Receiving a message to a Group Inbound Email account in Sugar

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- 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.





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Create Archived Email Cancel **Archive** >>

Date Sent  
2017-09-30 08:00am

From  
Jill Demo

To  
Eric Stoltz

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.

Compose Email Cancel

From Jill Demo <jill.demouser@gmail.com> [smtp.gmail.com] Cc **Bcc**

To

Bcc

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

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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.

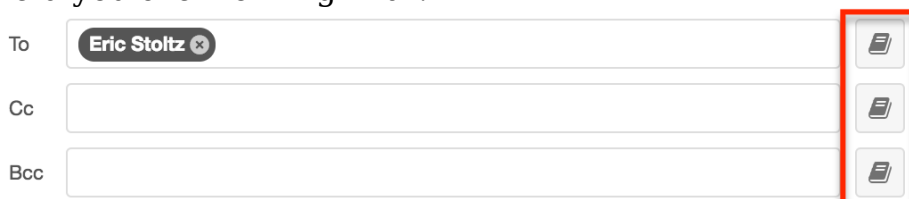


- To remove recipients from the message altogether, click the x inside the recipient's pill or select the recipient(s) and press the Delete key on your keyboard.
- To deselect recipient(s), click the blank space inside the field.

## Using the Address Book

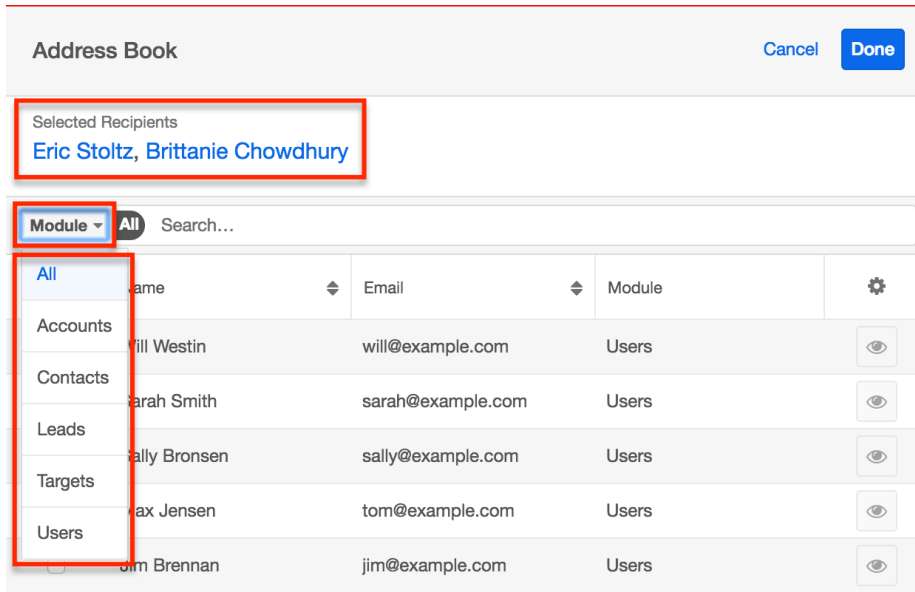
You can search across modules using the Address Book in the Emails module, which aggregates the users, contacts, leads, targets, and accounts in Sugar that have at least one valid email address.

To access the address book, click on the address book icon next to the recipient field you are working with.

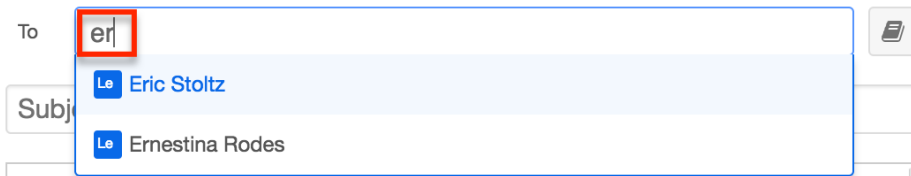


You can search for and select multiple recipients from the Address Book and filter the Address Book's list view to restrict results to a specific module such as

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

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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:

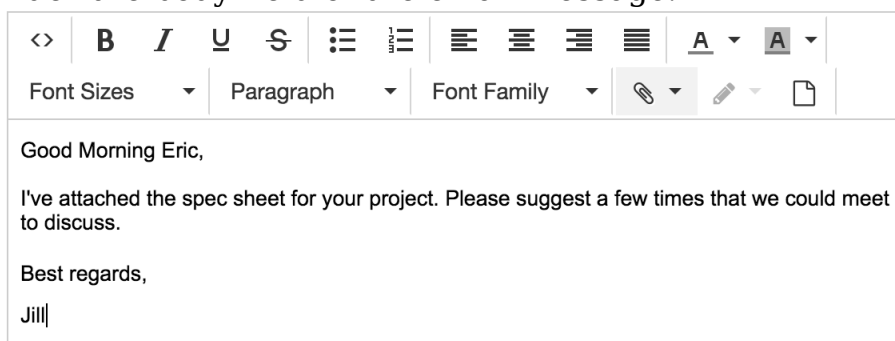


The Attachment menu provides two options:

- 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

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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.

The screenshot shows an email management interface. On the left, a table lists emails with columns for From, Subject, Status, and Date. The first row is highlighted, showing an email from 'Administrator' with subject 'White Cross Co' and status 'Draft'. A paper clip icon is next to the subject, and a red box highlights it. A red arrow points from this icon to the preview pane on the right. The preview pane shows the email details: 'Subject: White Cross Co', 'From: Administrator', 'Date: 2018-01-02 11:28am', and 'To: White Cross Co'. Below the text, there is an 'Attachments' section with a red box around the entry 'Email Attachment : ... (835K)'.

	From	Subject	Status	Date	
<input type="checkbox"/>	Administrator	White Cross Co	Draft	2018-01-02	
<input type="checkbox"/>	Administrator	White Cross Co	Draft	2018-01-02	
<input type="checkbox"/>	Sally Bronsen	Demo	Archived	2017-07-14	
<input type="checkbox"/>	Administrator	Discuss pricing	Draft	2017-12-29	
<input type="checkbox"/>	Sally Bronsen	Introduce all players	Archived	2017-10-12	
<input type="checkbox"/>	Administrator	Demo	Draft	2017-12-29	
<input type="checkbox"/>	Will Westin	Demo	Archived	2017-03-07	

## 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.

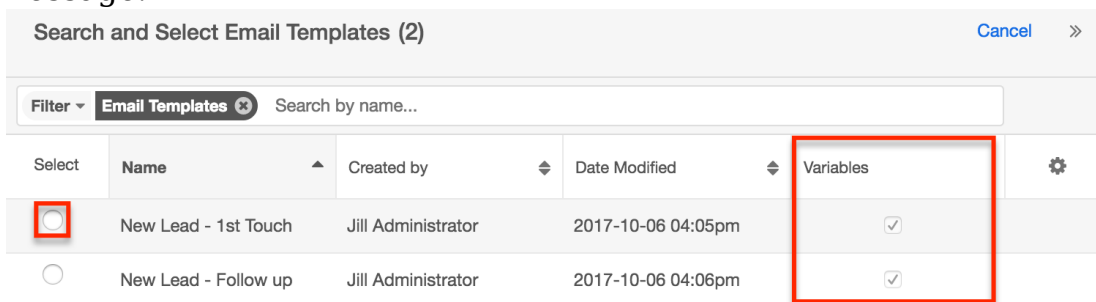
As a best practice, send templates that contain variables to a single recipient only. If the template has any variable fields defined in it (i.e. \$contact\_name), Sugar will replace the variables with corresponding values from a related record. If multiple records share the same email address or multiple 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

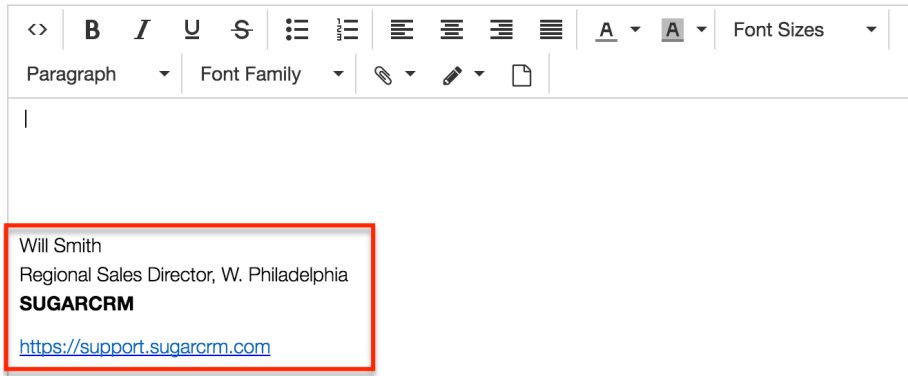
Email signatures are an easy way to standardize the messages you send with your contact details or other messaging. For more information on how to create an email signature, please refer to the Email Signatures section of this documentation.

Follow these steps to choose an email signature for a message:

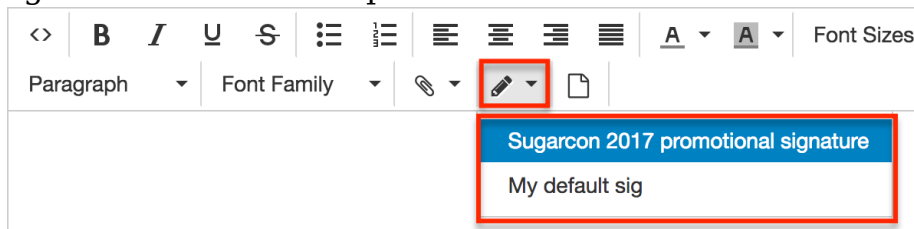
1. First, create a new email or edit a saved draft.
  - If you have created a default signature, it will automatically appear in the body of the message and you can simply type your message above the signature.







- 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

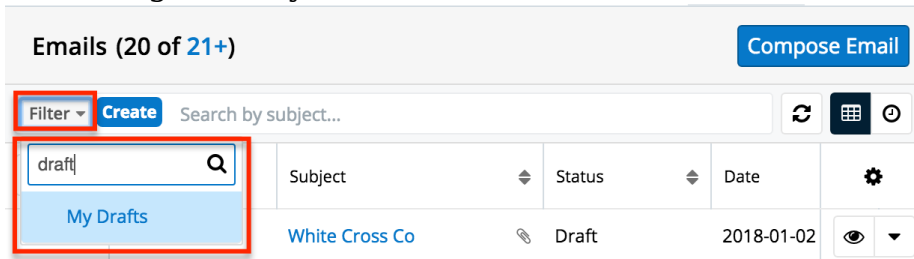
To save a draft of an email that you do not want to send right away, simply start composing a new email message and click "Save Draft" instead of using the Send button. Any content, recipients, templates, and signatures used in the email are saved with the draft. Only the administrator and the Assigned 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

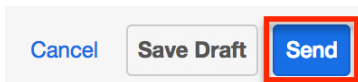
appear alongside archived emails in the Emails list view and can be isolated in list view using the "My Drafts" filter.



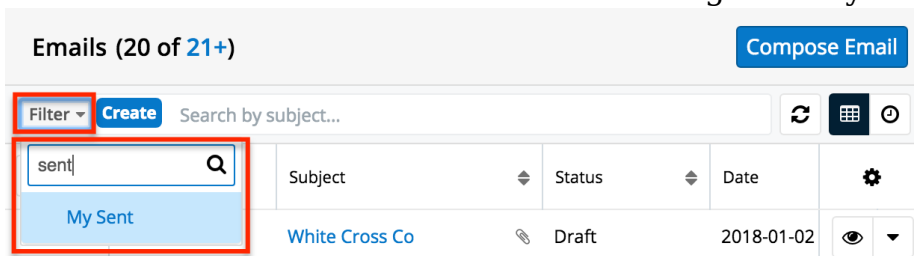
Click on the subject of a draft email to launch the Compose Email screen where the email's assigned user can continue editing the email and save the email as a draft again or send the email, which will change the email's status to "Archived".

## Sending Emails

To send an email to the recipients in an email's To, Cc, and Bcc fields, simply click the Send button.



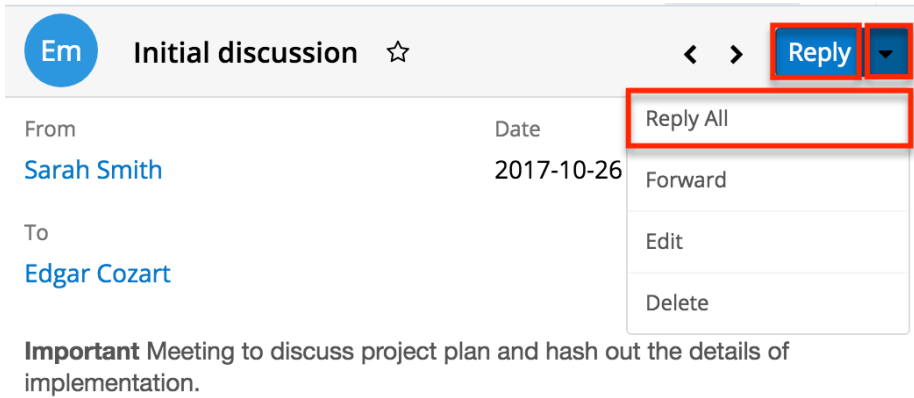
Sent emails will use the settings configured for the From account to send the email. A copy of the sent email will be saved to Sugar as "Archived" in the Emails module and can be isolated in list view using the "My Sent" filter.



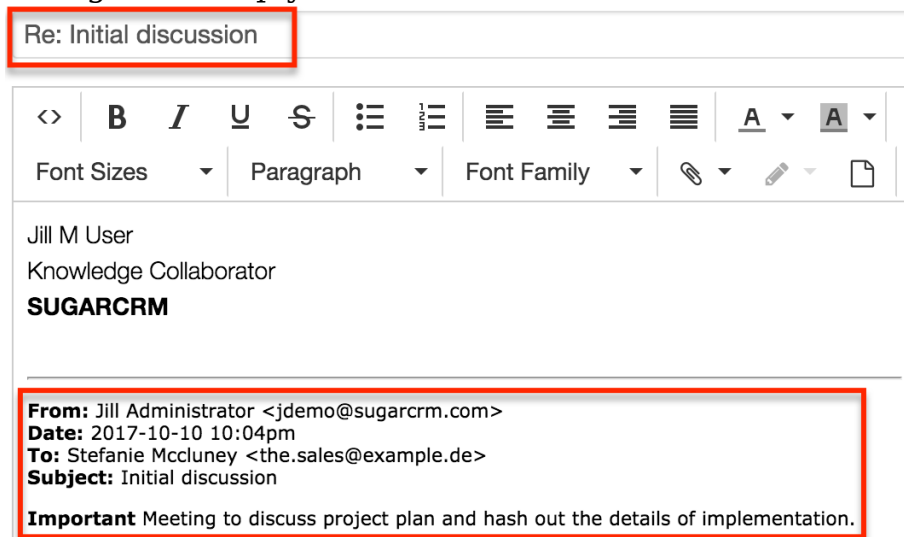
## Replying to Emails

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.

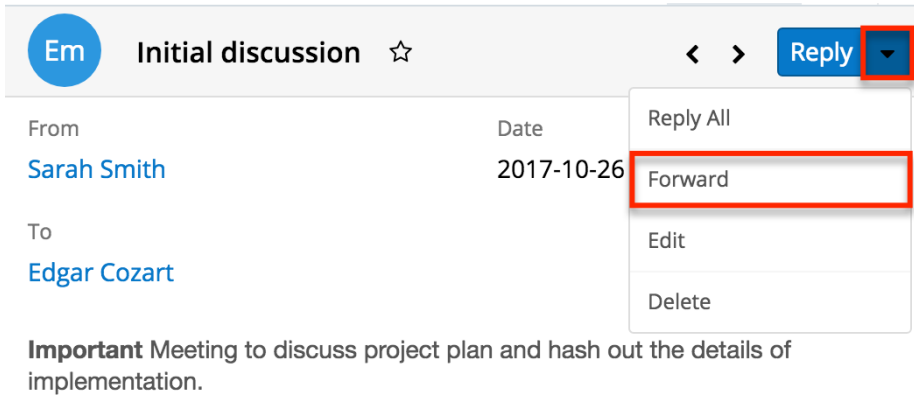


Enter your reply above the divider line in the compose email screen. For more information on how to compose an email, please refer to the Composing Emails section.

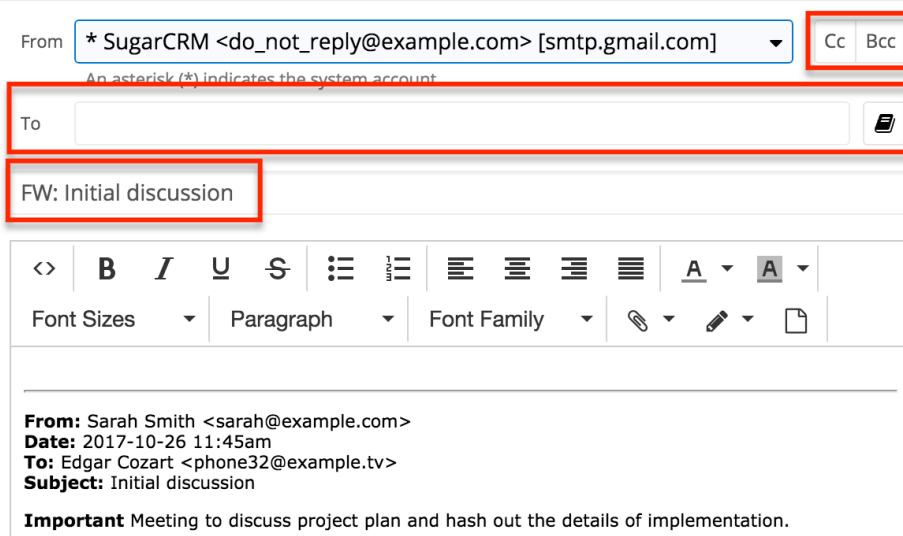
Note: If the original email contained any attachments, they will not copy to the reply email.

## 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.

Related ▾ All Filter All Records Search... [Refresh] [Grid] [Close]

Ac ACCOUNTS (1) [+ ▼]

Co CONTACTS (1) [+ ▼]

	Name	Account Name	Email	Link Existing Record
☆	Edgar Cozart	AB Drivers Limited	phone32@example.tv (587) €	[Eye] ▼

## Unlinking Emails

When an email is explicitly related to a record, users have the option of unlinking the email record via the Emails subpanel. Please note that the unlink option is not available for email records that are implicitly related via a matching email address or automated email importing. As a result, the unlink option is not available when viewing the Emails subpanel in the following modules: Accounts, Contacts, Leads, Targets, Cases, Opportunities, and Revenue Line Items. For more information on the different ways emails can be related to records in Sugar, please refer to the Relating Emails to Records section.

To delete the relationship between the record and the related email, simply navigate to the module record (e.g. Quotes) containing the related email and choose "Unlink" from the Actions menu on the far right of the desired record's row in the Emails subpanel. Please keep in mind that performing this action removes the relationship but does not delete the email record itself.

Em EMAILS (2) [+ ▼]

	From	Subject	Status	Date	
☆	Mary Thompson	Follow up on invoice	Archived	01/23/2018 04:44pm	[Eye] ▼
☆	Mary Thompson	Follow Up	Archived	01/23/	Unlink

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## 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 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 Advanced Workflow 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.

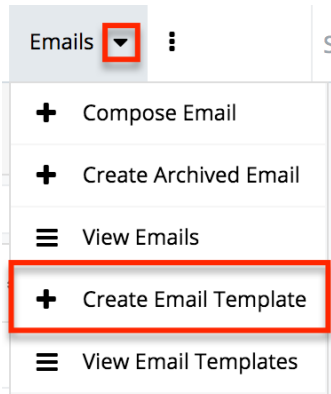
Note: If you are logged in as an administrator, you can view and edit the "Forgot Password email" and "System-generated password email" system templates via the Email Templates list view.

## 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	<p>The content of the message including any text, HTML content, images, or variables</p> <p>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.</p>
Date Created	The date the email template record was

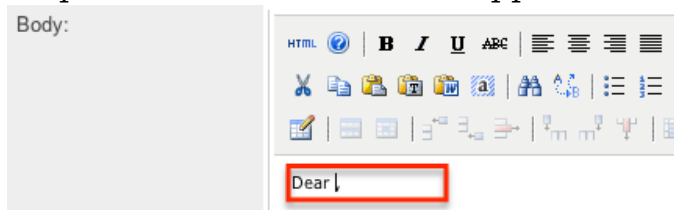
	created
Date Modified	The date the email template record or its content was last modified
Description	A description or other information about the email template
Name	A unique and descriptive name to help users find the template
Subject	The subject that recipients will see in their email inbox
Teams	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 documentations.

## Inserting Template Variables

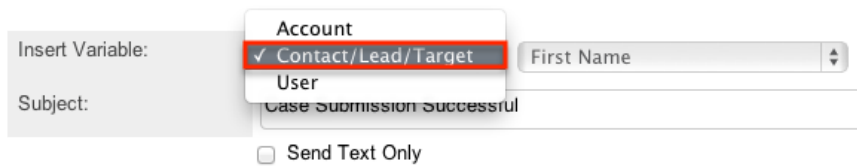
When constructing the subject and body of an email template, Sugar allows you to insert variables that correspond with Sugar fields on related records. The variables will be replaced with the related record's field values when the email is sent from Sugar. For example, you can insert a variable for the 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:

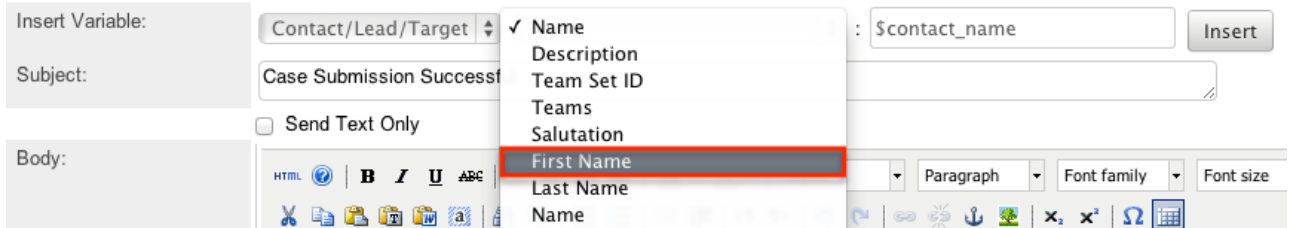
1. Click to place your cursor on the location in the subject or body where the recipient's first name should appear.



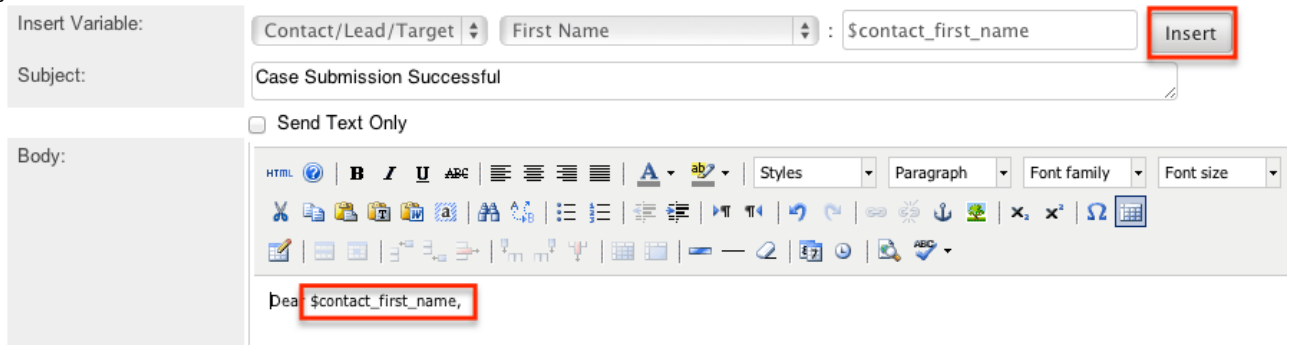
2. In the Insert Variable row, select the module you would like to insert a variable from.



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

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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.

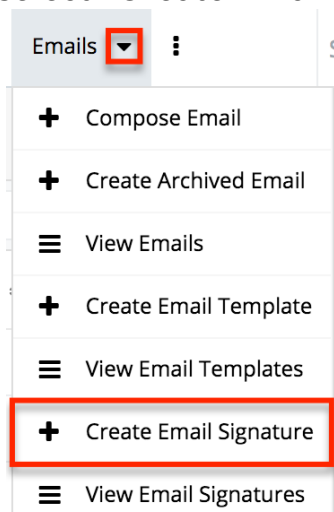
Note: You must have role access to the Emails module to view and create email signatures. For more information on roles, please refer to the Role Management documentation in the Administration Guide.

## 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.

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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

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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

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

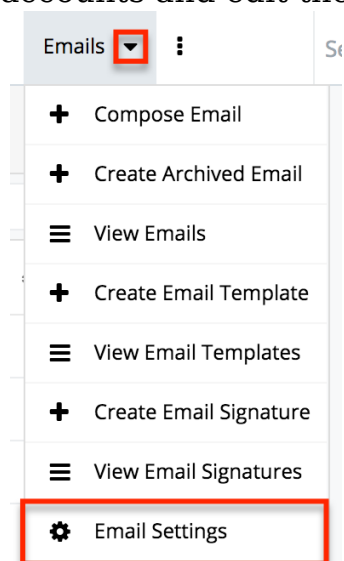
Like other records in Sugar, an email can only be assigned to one user. The Sugar Email Archiving service assigns emails to a user based on a match between the email address stored in the user's profile settings and an email address listed in the From, To, or CC fields. Sugar looks for users' email addresses 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



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Navigate to the Emails module and select "Email Settings" in the Emails module tab to open the Outgoing Email Accounts list view, where users can add email accounts and edit their configured email accounts.



The Outgoing Email Accounts list view is empty by default unless the administrator has enabled "Allow users to use this account for outgoing email" in Admin > System Email Settings, in which case the system email account should be shown with an asterisk to indicate that it is a system account. Once you have configured an outgoing user email account, the list will display it here along with any other user accounts you choose to configure.

Note: The Outgoing Email Accounts list view does not support filtering, preview, or mass actions.

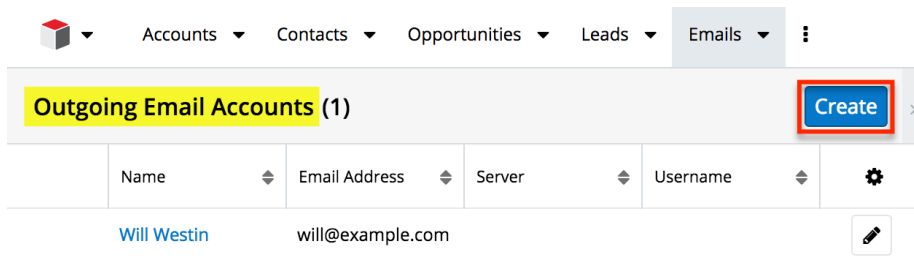
## Creating Outgoing Email Accounts

Sugar lets users configure one or more personal email accounts to send email messages. Email messages sent from Sugar will be automatically archived and linked to existing records throughout the application.

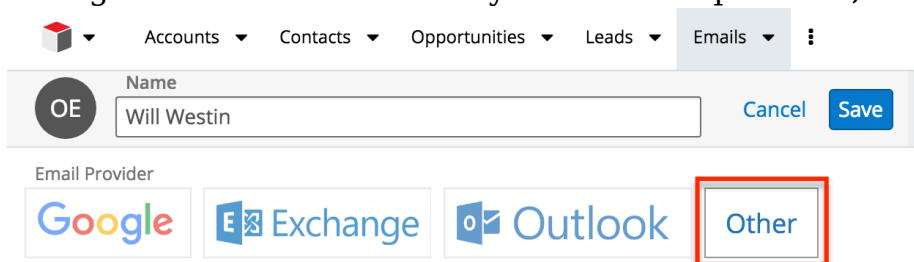
Note: To send messages through the Sugar application, you must select "Sugar Email Client" from the Email Settings section of your user profile. For more information, please refer to the Getting Started documentation.

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
  - Email Address : The email address used to send messages for this account
  - 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

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that cannot be edited and the following two required fields:

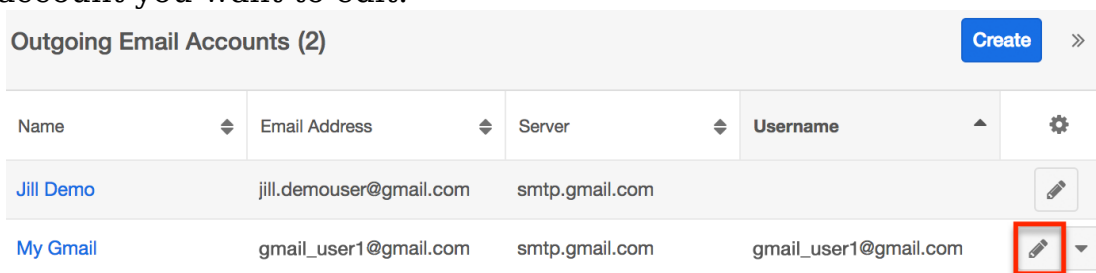
- New Password : Enter the account's existing password.
- Confirm Password : Re-type the account's existing password. This value must exactly match the "New Password" value in order to properly authenticate.



5. Once the necessary information is entered, click "Save" to preserve the changes. Sugar will automatically validate the settings and alert you if there has been 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 an outgoing email account that you created, navigate to the Emails module and select Email Settings from the module tab. Click the pencil icon next to the account you want to edit.



Name	Email Address	Server	Username	
Jill Demo	jill.demouser@gmail.com	smtp.gmail.com		
My Gmail	gmail_user1@gmail.com	smtp.gmail.com	gmail_user1@gmail.com	

Alternatively, click on the account's name and then click the Edit button on its record view.

**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 email account that you created, navigate to the Emails module and select Email Settings from the module tab. Expand the record's Actions menu in the list view and select "Delete".



Outgoing Email Accounts (2)				Create	>>
Name	Email Address	Server	Username		
Jill Demo	jill.demouser@gmail.com	smtp.gmail.com			
My Gmail	gmail_user1@gmail.com	smtp.gmail.com	gmail_user1@gmail.com		

Delete

Alternatively, click on the account's name and then select "Delete" from the Actions menu on its record view.

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.

Last Modified: 2018-05-25 23:06:31

## 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. 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
Contact Name	The contact record the task is related to  Note: The task will appear in either the contact's Active Tasks 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 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.

The screenshot shows a 'Tasks (20 of 21+)' list view. The table has columns for Subject, Contact, Related to, Due Date, and Assigned User. Three tasks are visible, with their due dates highlighted in a red box:

Subject	Contact	Related to	Due Date	Assigned User
Ship product	Don Connors	XY&Z Funding Inc	01/12/2018 11:30am	Sally Bronsen
Close out supp...	Trudie Kelton	Cloud Cover Trust	12/20/2017 03:00pm	Chris Olliver
Follow up on si...	Liana Phillips	Sales Team: Rene...	12/22/2017 01:00pm	Max Jensen

## 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 Create Creating 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 Streams Viewing 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.
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	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



Activity Stream Dashboards	
Tasks Record View Favorite Designation Following Designation Next or Previous Record Actions Menu Show More Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Activity Stream Dashboards	The Record View section walks through the many elements of the Tasks Record View layout which contains detailed information about a single task record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Tasks record view's menu is available in the Record View Actions Menu section of this page.
Editing Tasks Editing Inline via Record View Editing via Record View Editing Inline via Subpanels Editing Inline via List View Mass Editing via List View Editing Fields	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. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.
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	The Merging Records section provides

Merging via List View	instructions for merging duplicate tasks which will combine field values and related records into a single task.
Viewing Task Change Logs	The Viewing Record Change Logs section describes the View Change 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.

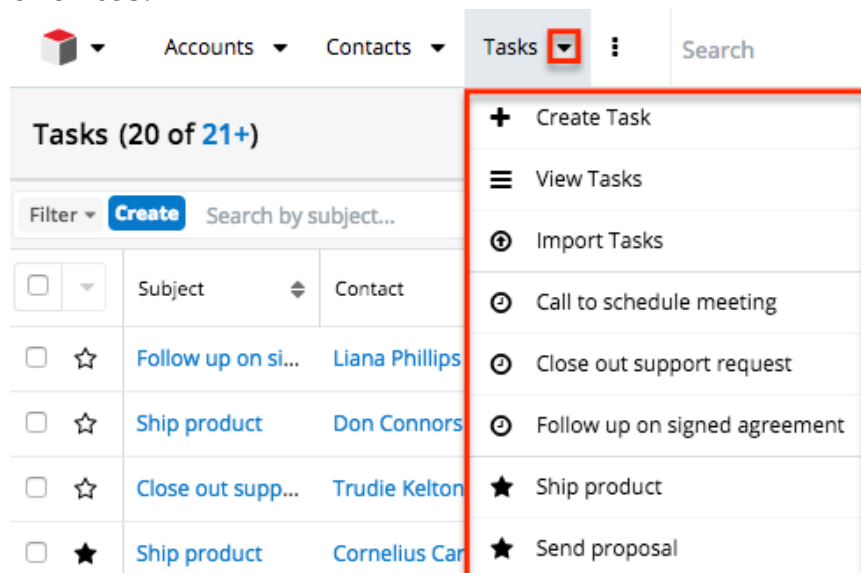
## Task Menus

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.

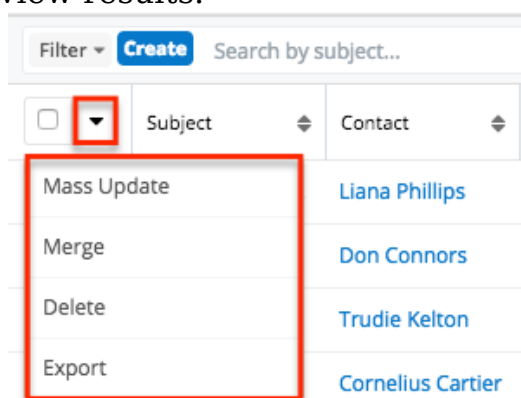
- The administrator may have disabled the Tasks module for your entire Sugar instance. Reach out to your Sugar administrator to have the Tasks module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the Administration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



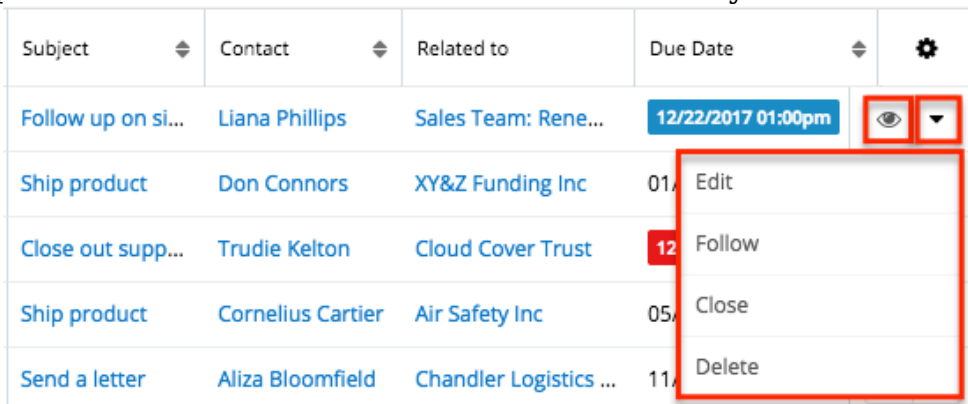
The Mass Actions menu allows you to perform the following operations:

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.

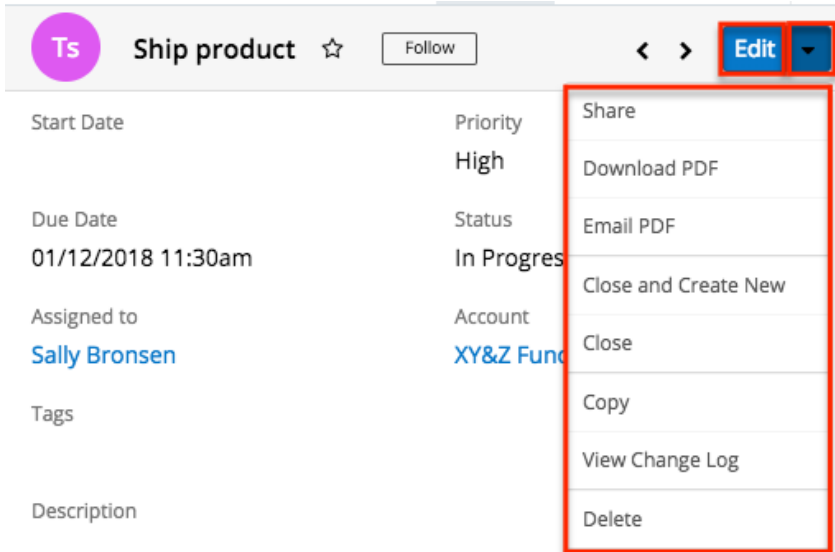


The list view's Record Actions menu allows you to perform the following operations:

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.  <ul style="list-style-type: none"> <li>• This menu option is only visible if the administrator has created a PDF template for the Tasks module via Admin &gt; PDF Manager.</li> <li>• Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul>
Email PDF	Email the record's information as a PDF attachment.  <ul style="list-style-type: none"> <li>• This menu option is only visible if the administrator has created a PDF template for the Tasks module</li> </ul>

	<p>via Admin &gt; PDF Manager.</p> <ul style="list-style-type: none"> <li>Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul> <p>Note: To send emails through Sugar, users must first configure a default user email account via Emails &gt; Email Settings.</p>
Close and Create New	<p>Close this task as "Completed" and duplicate to a new task.</p> <p>Note: This option only appears as long as the status does not equal "Completed".</p>
Close	<p>Close this task as "Completed".</p> <p>Note: This option only appears as long as the status does not equal "Completed".</p>
Copy	Duplicate this task to create a new task.
View Change Log	View a record of changes to this task.
Delete	Delete this task.

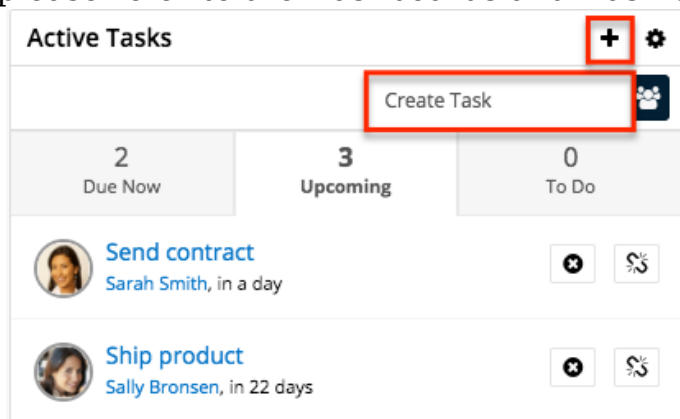
## Task Dashlets

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 which allows you to select the Tasks module and create a filter so that the dashlet displays tasks which meet your filter criteria. For more information, please refer to the Dashboards and Dashlets documentation. Sugar also offers two dashlets with specific tasks functionality: the Active Tasks dashlet and the Inactive Tasks dashlet. The dashlets may be added to a user's Home page as well as to a module's (e.g. Accounts, Contacts, etc.) intelligence pane. When on a related module's record view, they will only show tasks related to the current record. For example, if it is placed on the Account module's record view, when a user views ABC Account's record, the Active Tasks and Inactive Tasks dashlets will only show tasks related to ABC Account.

### Active Tasks Dashlet

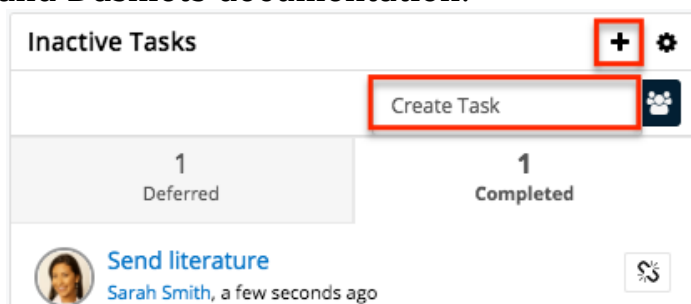
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The Active Tasks dashlet displays all tasks in a status of "Not Started", "In Progress", and "Pending Input" with the tasks broken into three tabs based on their due dates. Users can easily create new tasks, close tasks, and unlink tasks from the current record. For more 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. Users can easily create new tasks and unlink tasks from the current record. For more 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".

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



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cause it to instead appear in the Inactive Tasks dashlet along with deferred tasks. For more information on dashlets, please refer to the Dashboards and Dashlets documentation

## 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".

<input type="checkbox"/>	<input type="checkbox"/>	Subject	Contact	Related to	Due Date	
<input type="checkbox"/>	<input type="checkbox"/>	Send literature	Edgar Cozart	XY&Z Funding Inc	10/20/2017 01:30am	
<input type="checkbox"/>	<input type="checkbox"/>	Close out supp...	Miles Rux	XY&Z Funding Inc	12/21/2017 05:30pm	
<input type="checkbox"/>	<input type="checkbox"/>	Send a follow-u...	Stefan Constable	XY&Z Funding Inc	12/15/	Edit
<input type="checkbox"/>	<input type="checkbox"/>	Send contract	Muriel Ormond	XY&Z Funding Inc	12/22/	Follow
<input type="checkbox"/>	<input type="checkbox"/>	Arrange refere...	Jennie Hannum	XY&Z Funding Inc	01/15/	Close

## Closing via Record View

Use the following steps to close a task via the record view:

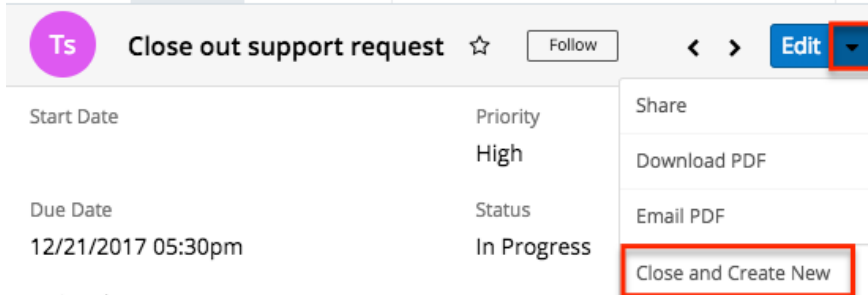
1. Navigate to a task's record view.
2. Select "Close" from the Actions menu.

The screenshot shows a task record view for "Close out support request". The task is assigned to Chris Olliver and has a due date of 12/21/2017 05:30pm. The priority is High and the status is In Progress. The account is XY&Z Funding. The "Edit" dropdown menu is open, showing options: Share, Download PDF, Email PDF, Close and Create New, and Close. The "Close" option is highlighted with a red box.

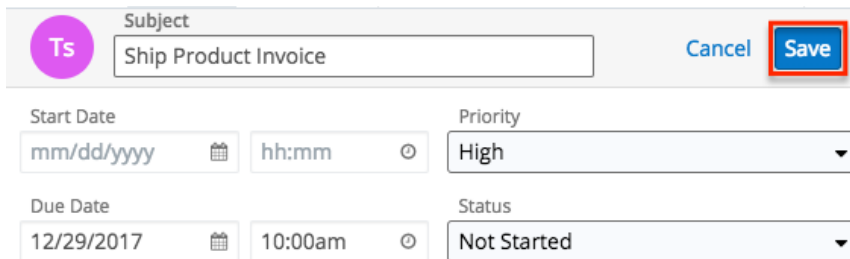
## Closing and Creating New via Record View

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.



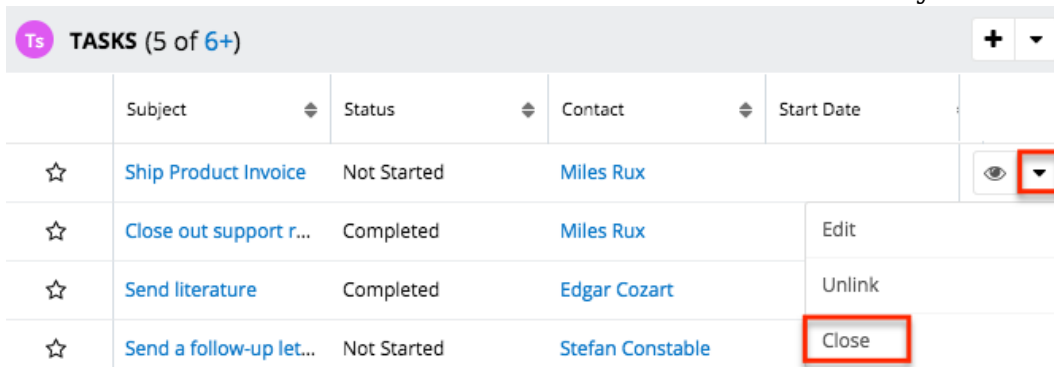
3. The displayed record view is pre-populated with the original task's values. By default, the new task's status is set to "Not Started". Update the necessary fields then click "Save".



## 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.

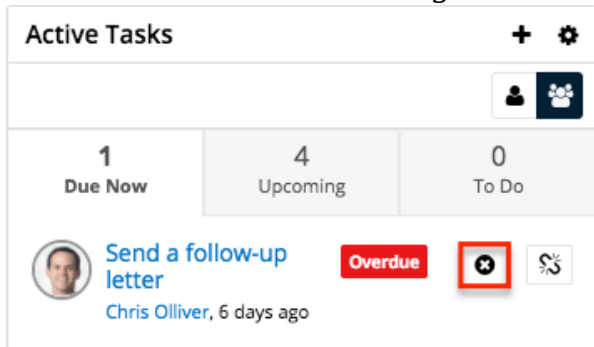


## Closing via Dashlet

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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.



## Calendar

Day **Week** Month Year Shared

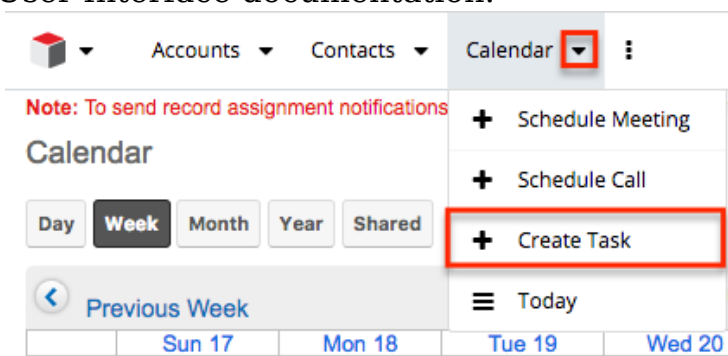
December 17 2017 - December 23 2017

	Sun 17	Mon 18	Tue 19	Wed 20	Thu 21	Fri 22
08:00am						
09:00am						
10:00am				Process Review <i>i</i>		
11:00am						Ship product <i>i</i>
12:00pm						

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

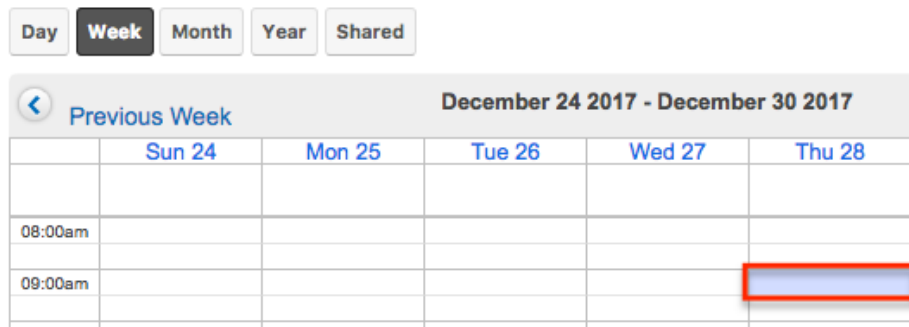
There are two methods of creating tasks in the Calendar module. The first method is to create a task via the Create Task option in the Calendar module tab. This will open up the Tasks record view in edit mode to create a new task record. For more information on creating tasks, please refer to the Creating Records section of the User Interface documentation.



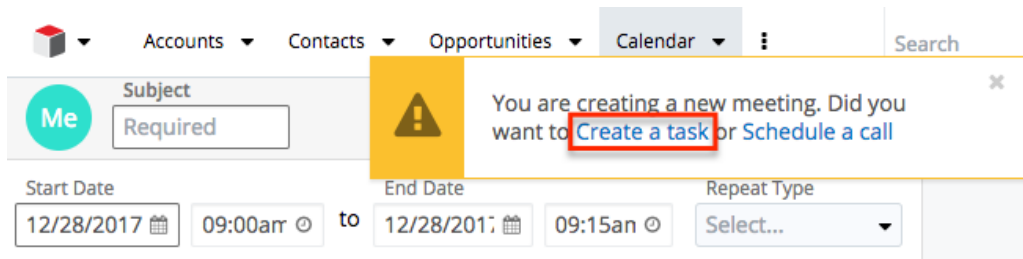
The second method is to create the task directly via the user's Sugar calendar using the following steps:

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.

## Calendar



3. When a cell is selected, a popup will appear at the top of the drawer. Select "Create a task".

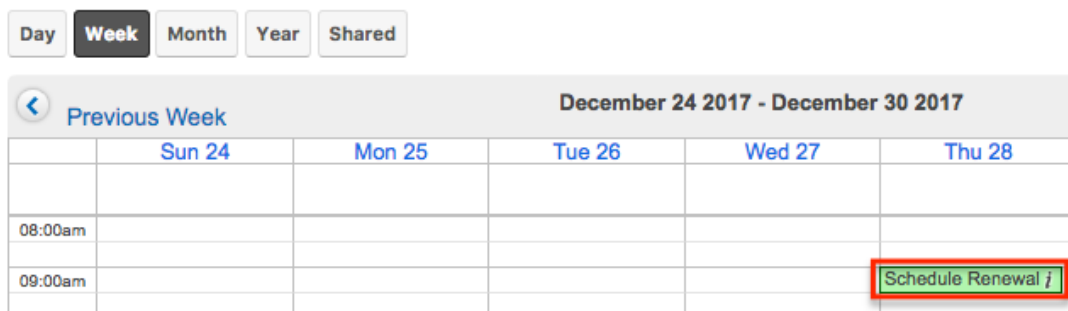


4. Refer to step 2 and beyond in the Basic Record Creation section of the User Interface documentation for additional instructions about creating task records.

## 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.

### Calendar



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.



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Additional Details





**Due Date & Time:** 12/28/2017 09:00am

**Priority:** High

**Status:** Not Started

Last Modified: 2018-01-03 20:02:04

## 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 Notes 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. 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.
Contact	The contact record the note is related to. Note: If populated, this note will show in the contact's History subpanel
Display in Portal?	Select this checkbox to allow the note to be displayed in the customer portal
Note	The details and content of the note
Related to	The module and record that is related to this note Note: This will decide which module this note will show in the History subpanel
Subject	The subject or designation of the note
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 Notes

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 Notes section describe Notes-specific behaviors and functionality.

Content Link	Description
<a href="#">Creating Notes</a> <a href="#">Basic Note Creation</a> <a href="#">Creating via Quick Create</a> <a href="#">Creating via Subpanels</a> <a href="#">Creating via Duplication</a> <a href="#">Importing Notes</a>	The Creating Records section covers the various methods of creating new note records, including via the Create button in the Notes module, the Quick Create menu on the upper right of every Sugar page, via the Notes subpanel on related module records, duplication of an

	existing note record, and importing a list of notes into Sugar using a .csv spreadsheet.
<p>Viewing Notes</p> <ul style="list-style-type: none"> <li>Viewing via List View</li> <li>Viewing via Record View</li> <li>Viewing via Recently Viewed</li> <li>Viewing via Dashlets</li> <li>Viewing via Activity Streams</li> <li>Viewing via Preview</li> <li>Viewing via Reports</li> </ul>	The Viewing Records section describes the various methods of viewing note records, including via the Notes list view and record view, the Recently Viewed menu in the Notes module tab, list view dashlets showing note information, activity stream entries concerning note updates or where a user mentions a note, previewing notes in the right hand side panel, and reports displaying note data.
<p>Searching for Notes</p> <ul style="list-style-type: none"> <li>Global Search</li> <li>List View Search</li> <li>Creating a Filter</li> <li>Saving a Filter</li> </ul>	The Searching for Records section provides an introduction to the two searching methods for locating notes: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Notes module.
<p>Notes List View</p> <ul style="list-style-type: none"> <li>Total Record Count</li> <li>Create Button</li> <li>List View Search</li> <li>Checkbox Selection</li> <li>Mass Actions Menu</li> <li>Favorite Designation</li> <li>Column Reordering</li> <li>Column Resizing</li> <li>Column Sorting</li> <li>Column Selection</li> <li>Preview</li> <li>Record Actions Menu</li> <li>More Notes</li> <li>Activity Stream</li> <li>Dashboards</li> </ul>	The List View section walks through the many elements of the Notes List View layout which contains a filterable list of all note 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 Notes list view are described in the
<p>Notes Record View</p> <ul style="list-style-type: none"> <li>Favorite Designation</li> <li>Following Designation</li> <li>Next or Previous Record</li> <li>Actions Menu</li> <li>Show More</li> <li>Activity Stream</li> </ul>	The Record View section walks through the many elements of the Notes Record View layout which contains detailed information about a single note record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically

Dashboards	available in the Notes record view are described in the Record View Actions Menu section of this page.
Editing Notes Editing Inline via Record View Editing via Record View Editing Inline via Subpanels Editing Inline via List View Mass Editing via List View Editing Fields	The Editing Records section describes the various methods of editing existing note records, including inline via the Notes record view, in full edit mode on the record view, inline via the Notes subpanel on related module records, inline via the Notes list view, and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.
Deleting Notes Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted notes, including via the Notes record view, an individual record's Actions menu on the Notes list view, and the Mass Actions menu on the list view.
Exporting Notes	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of notes 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 Notes Merging via List View	The Merging Records section provides instructions for merging duplicate notes which will combine field values and related records into a single note.
Note PDFs Downloading Note PDFs Emailing Note PDFs	The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of note information as configured by an administrator via Admin > PDF Manager.
Favoriting Notes	The Favoriting Records section

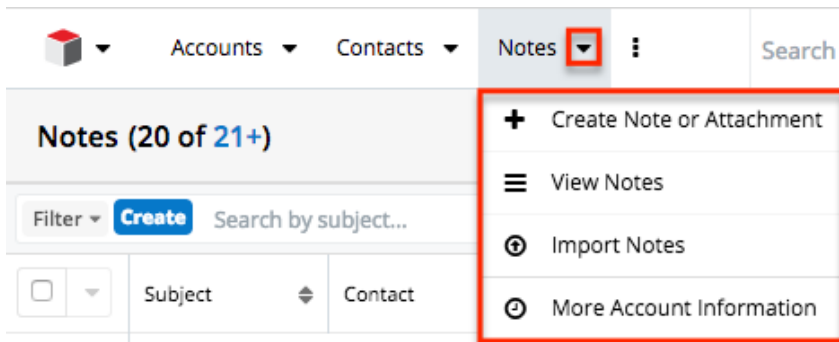
<p>Favoriting via List View  Favoriting via Record View  Favoriting via Subpanel</p>	<p>describes the various methods of marking notes as favorites, including via the Notes list view, Notes record view, or any Notes subpanel appearing on the record view of a related module. Favoriting a note allows you to easily access it from list views, dashlets, or the Notes module tab.</p>
<p>Following Notes  Following via List View  Following via Record View</p>	<p>The Following Records section describes the various methods of marking notes as "Following", including via the Notes list view and record view. Following a note causes its activity stream updates to be included on your Home page and Notes list view activity streams so that you can easily keep up with changes and user posts on the record.</p>
<p>Sharing Notes</p>	<p>The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the note record. If the recipient is logged into Sugar, clicking the link will bring them directly to the note's record view.</p>

## 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:

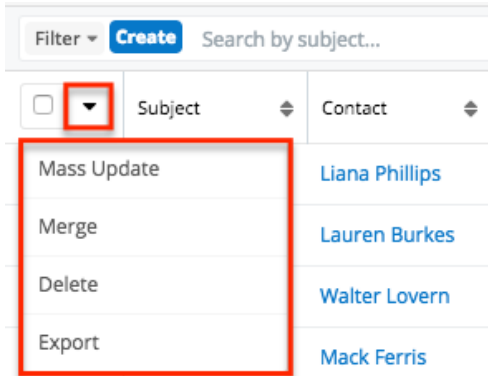
- The Notes module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Notes module in the Hide Modules list, simply 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.

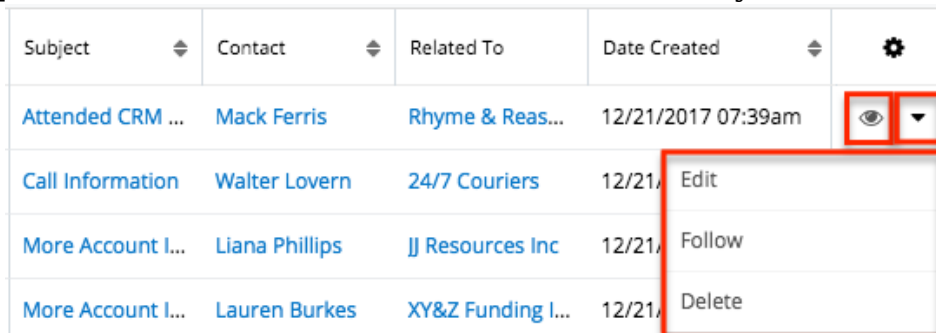


The Mass Actions menu allows you to perform the following operations:

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.

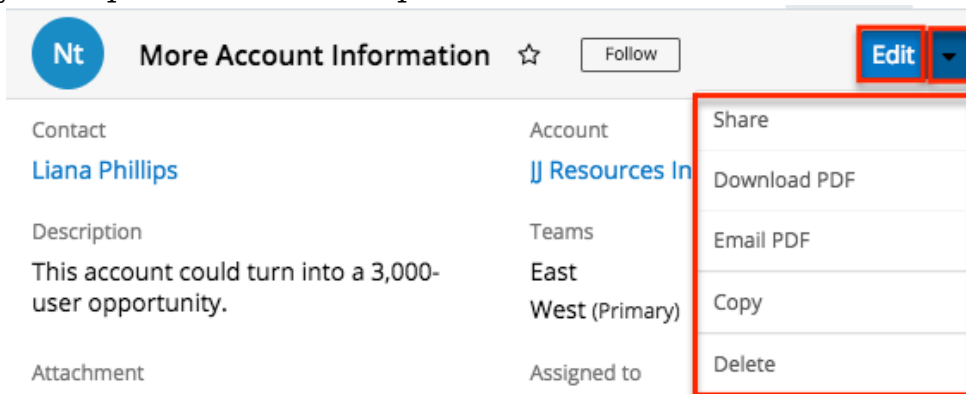


The list view's Record Actions menu allows you to perform the following operations:

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

Last Modified: 2017-12-22 00:05:02

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# Targets

## Overview

Sugar's Targets module consists of individual people who are unqualified prospects that you have some information on but who are not yet qualified leads. Information (e.g. name, email address) regarding these targets are normally acquired from business cards you receive while attending various trades shows, conferences, etc. Targets in Sugar are stand-alone records as they are not related to contacts, leads, accounts, or opportunities. Once the target is qualified according to your organization's practices, it can be converted into a lead record. This documentation will cover information and actions specific to the Targets module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting targets, please refer to the Working With Targets

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

## Target Fields

The Targets module contains a number of stock fields which come out-of-the-box with Sugar. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. Administrators or users with developer-level role access have the ability to alter, add, or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Studio documentation in the Administration Guide.

Field	Description
Account Name	The account to which the target belongs
Alternate Address	The target's alternate address (e.g. billing or shipping)
Assigned To	The Sugar user assigned to the target
Assistant	The name of the target's assistant within his or her company
Assistant Phone	The assistant's phone number
Birthdate	The target's date of birth
D&B Principal ID	Unique ID number associated to the



	individual in D&B
Date Created	The date the target record was created
Date Modified	The date the target record was last modified
Department	The target's department within their company
Description	A description or other information about the target
Do Not Call	Indication that the target should not be called
Email Address	The target's email address
Email Opt Out	Indication that the target has opted out of receiving emails
Facebook Account	The target's Facebook account information
Fax	The target's fax number
First Name	The target's first name
Google Plus ID	The target's Google Plus ID
Home	The target's residence number
Last Name	The target's last name
Mobile	The target's mobile number
Name	When viewing, the target's full name
Office Phone	The target's office number
Other Phone	The target's alternate phone number
Primary Address	The target's primary address
Salutation	Standard greeting for the target (e.g. Mr., Ms., Mrs., etc.)
Tags	<p>User-created keywords that can be used to identify records in filters, dashlets, and reports</p> <p>Note: For more information on creating and using tags, please refer to the Tags documentation.</p>
Teams	The Sugar team(s) assigned to the target record
Title	The target's business title

Twitter Account	The target's Twitter account information
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## Working With Targets

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 Targets section describe Target-specific behaviors and functionality.

Content Link	Description
Creating Targets Basic Target Creation Creating via Quick Create Creating via Subpanels Creating via Duplication Importing Targets	The Creating Records section covers the various methods of creating new target records, including via the Create button in the Targets module, the Quick Create menu on the upper right of every Sugar page, via the Targets subpanel on related module records, via duplication of an existing target record, and importing a list of targets into Sugar using a .csv spreadsheet.
Viewing Targets Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Preview Viewing via Reports	The Viewing Records section describes the various methods of viewing target records, including via the Targets list view and record view, the Recently Viewed menu in the Targets module tab, previewing targets in the right hand side panel, and reports displaying target data.
Searching for Targets Global Search List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to the two searching methods for locating targets: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Targets module.
Targets List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering	The List View section walks through the many elements of the Targets List View layout which contains a filterable list of all target records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Targets list view are described in

<p>Column Resizing  Column Sorting  Column Selection  Preview  Record Actions Menu  More Targets  Dashboards</p>	<p>the List View Mass Actions Menu and List View Record Actions Menu sections of this page.</p>
<p>Targets Record View  Favorite Designation  Next or Previous Record  Actions Menu  Show More  Subpanels  Related Record Subpanels  Filtering Subpanels  Reordering Subpanels  Dashboards</p>	<p>The Record View section walks through the many elements of the Targets Record View layout which contain detailed information about a single target record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Targets record view are described in the Record View Actions Menu section of this page.</p>
<p>Editing Targets  Editing Inline via Record View  Editing via Record View  Editing Inline via Subpanels  Editing Inline via List View  Mass Editing via List View  Editing Fields</p>	<p>The Editing Records section describes the various methods of editing existing target records, including inline via the Targets record view, in full edit mode on the record view, inline via the Targets subpanel on related module records, inline via the Targets list view, and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.</p>
<p>Deleting Targets  Deleting via Record View  Deleting via List View  Mass Deleting via List View</p>	<p>The Deleting Records section describes the various methods of deleting unwanted targets, including via the Targets record view, an individual record's Actions menu on the Targets list view, and the Mass Actions menu on the list view.</p>
<p>Emailing Targets  Emailing via Email Address Fields  Emailing via List View  Emailing via Quick Create  Emailing via Emails Module  Emailing via Workflows</p>	<p>The Emailing Records section describes the various methods of emailing target records as recipients, including clicking any email address within Sugar, via the Mass Actions menu on the Targets list view, via the Quick Create menu, via the Emails module using the Related To field, and via workflows which can</p>

	<p>automatically send emails according to conditions configured by administrator users.</p>
Exporting Targets	<p>The Exporting Records section provides an introduction to the export functionality which allows you to download a list of targets and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).</p>
Recalculating Calculated Values	<p>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 &gt; Studio.</p>
Finding Duplicate Targets	<p>The Finding Duplicate Records section provides instructions for locating duplicate target records. If searching on matching fields (e.g. Last Name) identifies one or more duplicates, they can be merged into a single record.</p>
Merging Targets Merging via List View	<p>The Merging Records section provides instructions for merging duplicate targets which will combine field values and related records into a single target.</p>
Viewing Target Historical Summaries	<p>The Viewing Record Historical Summaries section describes the Historical Summary record view option which displays quick details of the target record's related calls, meetings, emails, notes, and tasks.</p>
Target PDFs Downloading Target PDFs Emailing Target PDFs	<p>The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of target information as configured by an administrator via Admin &gt; PDF Manager.</p>
Favoriting Targets Favoriting via List View Favoriting via Record View Favoriting via Subpanel	<p>The Favoriting Records section describes the various methods of marking targets as favorites, including via the Targets list view, Targets record view, or any Targets subpanel appearing on the record view of a related module.</p>

	Favoriting a target allows you to easily access it from list views, dashlets, or the Targets module tab.
Sharing Targets	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the target record. If the recipient is logged into Sugar, clicking the link will bring them directly to the target's record view.

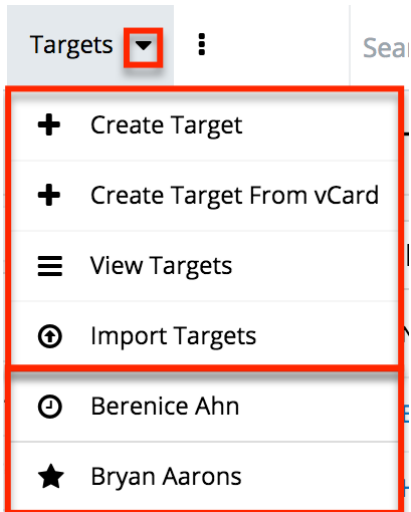
## Target Menus

The Targets 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 Targets-specific functionality, within this page.

### Module Tab Menus

The Targets module tab is typically located under the More tab of the navigation bar at the top of any Sugar screen. Sugar normally displays the top six modules shown in the Display Modules list of your user preferences, so the remaining displayed modules are grouped under the More tab. For more information on displayed modules for the navigation bar, please refer to the User Preferences section of the Getting Started documentation. Click the tab to access the Targets list view. You may also click the triangle in the Targets tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important operations within the module. The Recently Viewed menu displays the list of targets you most recently viewed. The Favorites Menu displays the list of targets you most recently marked as favorites.





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

Menu Item	Description
Create Target	Opens the record view layout to create a new target
Create Target From vCard	Opens the record view layout and populates fields from a vCard
View Targets	Opens the list view layout to search and display targets
Import Targets	Opens the import wizard to create or update targets using external data

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

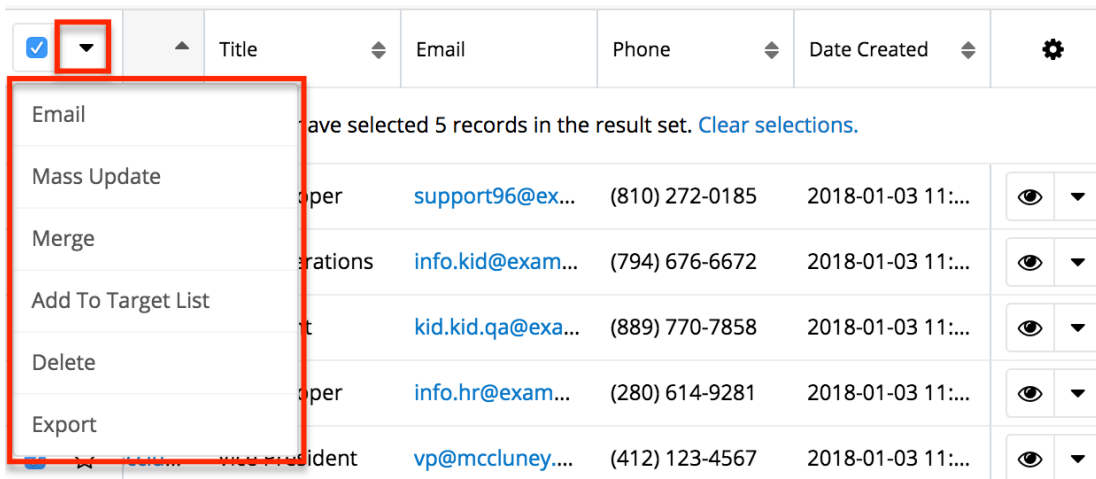
- The Targets module may be marked as hidden in your user preferences which will prevent the module tab from being displayed. Navigate to your user profile (upper right of Sugar), click the Advanced tab, and check the Layout Options section. If you see the Targets module in the Hide Modules list, simply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

## List View Menus

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

### List View Mass Actions Menu

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



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

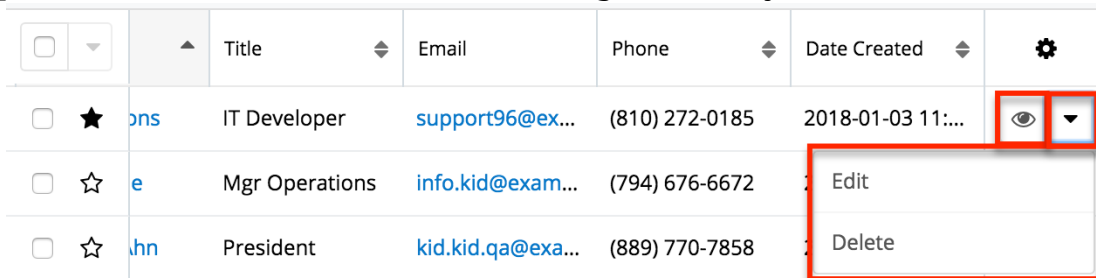
Menu Item	Description
Email	Email one or more targets at a time
Mass Update	Mass update one or more targets at a time
Merge	Merge two or more duplicate targets
Add to Target List	Add one or more targets to a target list
Delete	Delete one or more targets at a time
Export	Export one or more targets to a CSV file
Recalculate Values	(Available in certain circumstances) Updates calculated values to reflect changes to calculated fields made in Studio



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## List View Record Actions Menu

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



The screenshot shows a table with columns: Title, Email, Phone, and Date Created. The first row is highlighted. A red box highlights the Record Actions menu (eye icon and dropdown arrow) and the 'Edit' and 'Delete' options.

<input type="checkbox"/>	<input type="checkbox"/>	Title	Email	Phone	Date Created	Record Actions	
<input type="checkbox"/>	★	ons	IT Developer	support96@ex...	(810) 272-0185	2018-01-03 11:...	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	☆	e	Mgr Operations	info.kid@exam...	(794) 676-6672		Edit
<input type="checkbox"/>	☆	ohn	President	kid.kid.qa@exa...	(889) 770-7858		Delete

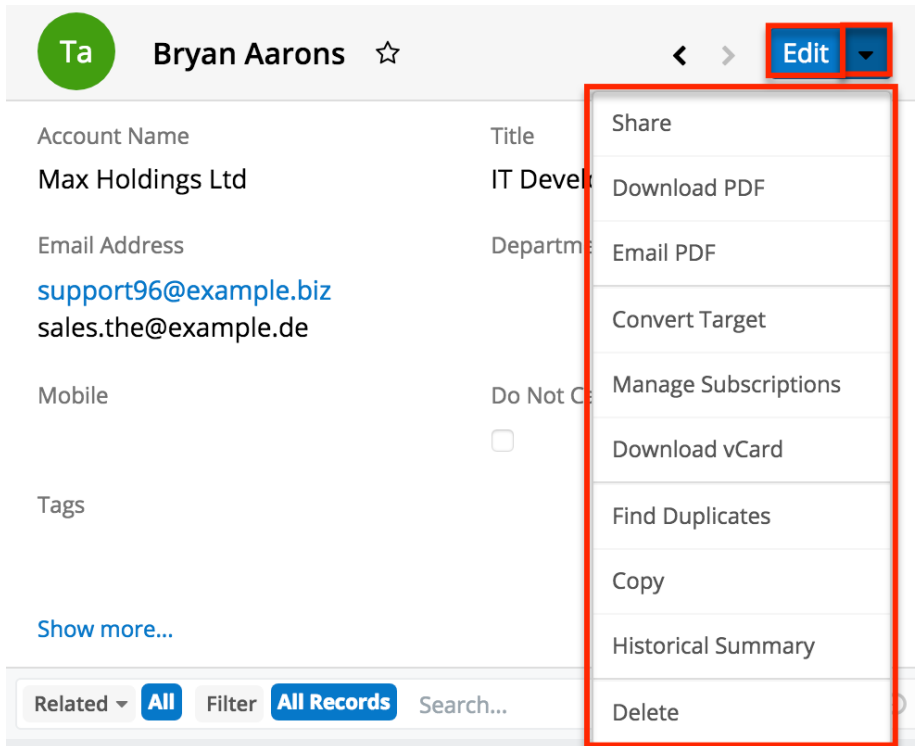
The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this target in the intelligence pane
Edit	Edit this target
Delete	Delete this target

## Record View Actions Menu

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





The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this target record.
Share	Share a link to this target record via email.
Download PDF	<p>Download the target information as a PDF file.</p> <ul style="list-style-type: none"> <li>• This menu option is only visible if the administrator has created a PDF template for the Targets module via Admin &gt; PDF Manager</li> <li>• Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul>
Email PDF	<p>Email the target information as a PDF attachment.</p> <ul style="list-style-type: none"> <li>• This menu option is only visible if the administrator has created a</li> </ul>

	<p>PDF template for the Targets module via Admin &gt; PDF Manager</p> <ul style="list-style-type: none"> <li>Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul> <p>Note: To send emails through Sugar, users must first configure a default user email account via Emails &gt; Email Settings.</p>
Convert Target	Convert this target to a lead.
Manage Subscriptions	Manage this target's newsletter campaign subscriptions.
Download vCard	Download a vCard from Sugar and transfer this target's information to another application (e.g. Outlook).
Find Duplicates	Locate potential duplicates of this target record.
Copy	Duplicate this target's information to create a new target record.
Historical Summary	View a historical summary of activities (e.g. calls, meetings, etc.) related to this target.
Delete	Delete this target record.

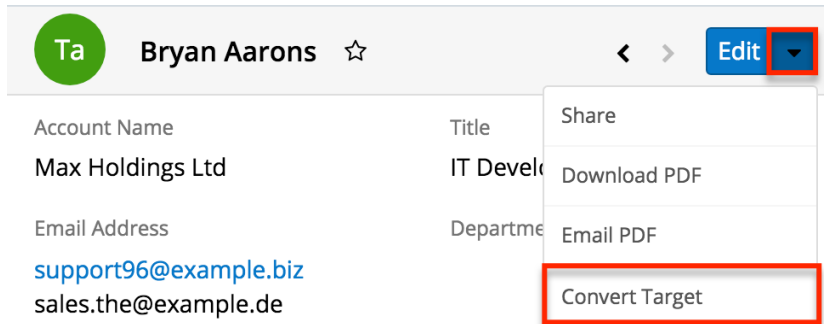
## Converting Targets to Leads

Sugar enables you to convert targets to leads as you determine they qualify for your organization's definition of a lead (e.g. after an evaluation/qualification process) and becomes a valid sales prospect. Please note that targets are only converted into leads in Sugar, and the new lead record will have a relationship to the original target record. Once the lead is qualified as a sales opportunity, they can be converted into contacts, opportunities, and accounts. For more information on lead conversions, please refer to the Leads documentation.

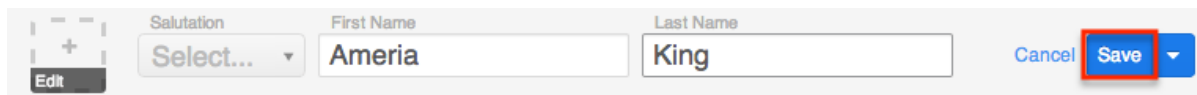
Use the following steps to convert a qualified target to a lead:

1. Navigate to a target's record view.
2. Select "Convert Target" from the Actions menu.

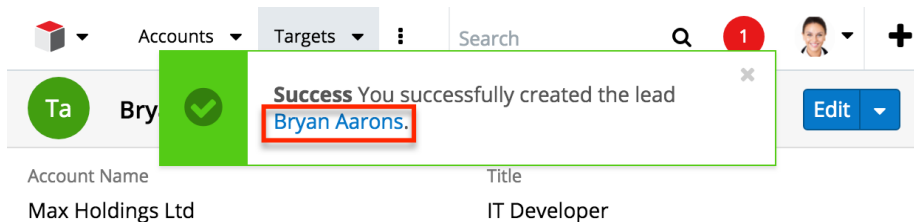




3. Enter appropriate values for the fields in the Leads record view layout then click "Save".
  - o Since targets only convert to a lead, the Leads record view displays all lead fields which are grouped by default into the Overview, More Information, and Other panels. Administrators have the ability to determine what fields are displayed on the Leads record view via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration Guide.



4. Once the conversion is complete, the target record will display the converted lead name at the top of the record view page. You can click the record's name to view the detail of the converted lead.



## Emails and Targets

Targets include an email address which can be used to email the target as a recipient. The methods for doing so are covered in the [Emailing Records](#) section of the [User Interface](#) documentation. Targets may also be recipients of campaigns which allow you to send email messages to a large group of recipients as well as to track the results of that message. Please refer to the [Campaigns and Targets](#) section of this page for more information. In addition to being a recipient or sender of an email, targets may be related to emails by being selected in the email's [Related To](#) field. These relationships allow the target to display all relevant email correspondence in the [Emails](#) subpanel and [History](#) dashlet on a target's record view.

## Emails Subpanel

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The Emails subpanel in the Targets module displays emails which are associated with the target record in a variety of ways:

- Explicitly related to the target : If the target is selected in the email's Related To field, the email and target are explicitly related, and the email will appear in the target's Emails subpanel and History dashlet. Instructions for using this flex relate field are available in the Emails documentation.
- Implicitly related to the target : If one of the target's email addresses appears in the email's From, To, or Cc fields, the email and target are implicitly related, and the email will appear in the target's Emails subpanel and History dashlet. This implicit relationship is made for emails sent from Sugar as well as any email imported into Sugar via Inbound email targets or email archiving.

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 target you are currently viewing. The email will automatically select the target in the Related To field as well as add the target'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.

	From	Subject	Status	Date	
☆	Sally Bronsen	Demo	Archived	2017-07-14 05:45am	👁️ ▼
☆	Administrator	Discuss pricing	Draft	2017-12-29 02:05pm	👁️ ▼
☆	Sally Bronsen	Introduce all players	Archived	2017-10-12 08:00am	👁️ ▼
☆	Administrator	Demo	Draft	2017-12-29 02:05pm	👁️ ▼
☆	Will Westin	Demo	Archived	2017-03-07 01:00pm	👁️ ▼

[More emails...](#)

## Campaigns and Targets

Sugar's Campaigns module can be used to send mass emails or a series of newsletter emails to Sugar accounts, contacts, leads, and targets. The results of each campaign are recorded to measure its impact. Targets are not related directly to campaigns. Rather, each campaign is related to several target list records, and each target list is related to targets and other recipients. To send a campaign email to a target, the target should belong to a default-type target list associated to the campaign. To prevent a target from receiving emails from a campaign, the target should belong to the campaign's suppression list-type target list. Once a campaign is sent, the results specific to a particular target will appear in the Campaign Log Subpanel on the target's record view as described in the Campaign Log Subpanel section of this page.

Targets can be added to target lists via the target list record itself, from the Targets list view using the Add To Target List option, or from the Targets record view using the Manage Subscriptions option. Instructions for using the Add To Target List and Manage Subscriptions options in the Targets module are provided in the sections below. For instructions on other available methods of adding to target lists, please refer to the Target Lists documentation.



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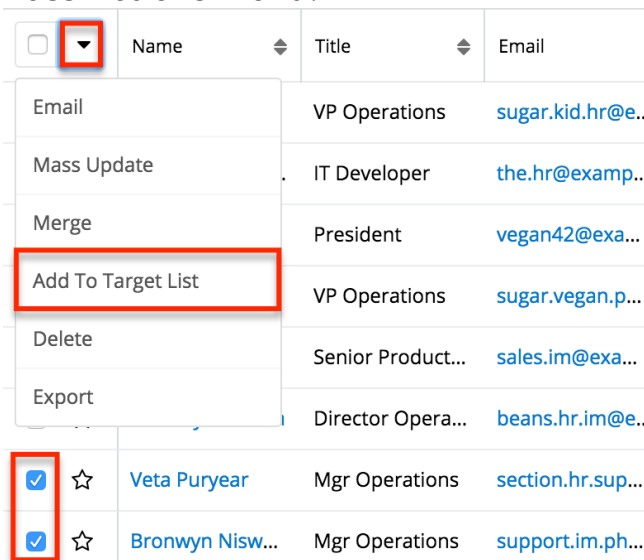
## Adding to a Target List via Targets List View

A target list consists of a group of individuals or organizations you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to add targets to a target list in Sugar including using the Add To Target List option from the Target list view's Mass Actions Menu. For more information on target lists and other methods of adding target, please refer to the Target Lists documentation.

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

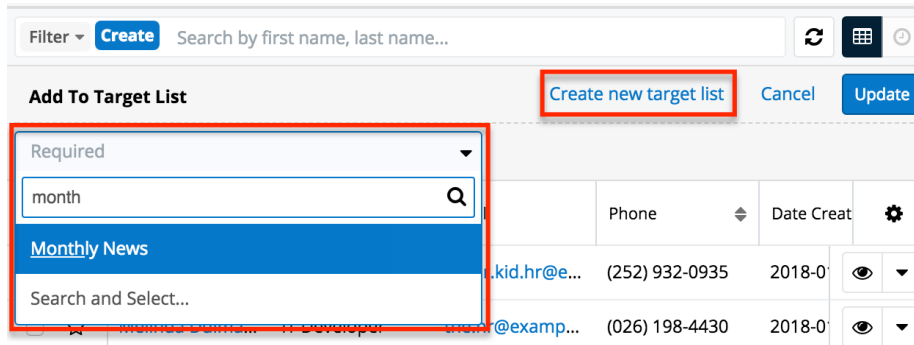
Use the following steps to add targets to a target list via the Targets list view:

1. Navigate to the Targets list view by clicking the Targets module tab.
2. Use the List View Search to find the Target records you wish to add to a target list.
3. Select the desired target records then choose "Add to Target List" from the Mass Actions menu.



4. Below the search bar, locate and select the desired target list in the dropdown list or click "Create new target list" to add the targets to a new target list. Click "Update" to add the record(s) to the target list.





In order to view the targets that have been added, you can navigate to the Target Lists module. Click the target list's name to open the record view, and you will see the target records within the Targets subpanel.

Ta TARGETS (2)					
	Name	Title	Email	Phone	
☆	Veta Puryear	Mgr Operations	section.hr.support...	(419) 462...	👁️ ▼
☆	Bronwyn Niswander	Mgr Operations	support.im.phone@...	(636) 09...	👁️ ▼

## Managing Target Subscriptions

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

Use the following steps to manage target subscriptions via a target's record view:

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



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

#### Manage Subscriptions

5. Click "Save" to preserve your changes.

## Campaign Log Subpanel

The Campaign Log subpanel contains historical information regarding a target's interaction with all Sugar campaigns. When a mass marketing campaign is sent to a target (or manually marked as sent in the case of non-email campaigns), the related campaign activity information will appear within the Campaign Log subpanel on the target's record view. This information mirrors the "View Status" page available from within each individual campaign and shows activities such as

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when a campaign was sent, when the recipient viewed the campaign message, when the recipient clicked a tracked link within the campaign, etc. Since this subpanel contains historical campaign interactions for the target, it cannot be used to associate a target with a campaign or otherwise manage a campaign or target list. For more information on associating a target with a campaign, please refer to the Adding to a Target List via Targets List View section of this page. For more information on campaigns, please refer to the Campaigns documentation.

The Campaign Log subpanel allows the following functions to be performed:

- Campaign Details : To view the details of a campaign, click its name to open it in detail view.
- Record Count : Subpanel headers display the total count of related records (e.g. "5 of 6+") next to the module name. The count captures the number of records currently displayed with an additional, hyperlinked number (e.g. "6+") where there are more records than currently displayed. Click the hyperlinked number to see the total count of related records.
- Collapse or Expand : Click anywhere in the subpanel's header to collapse or expand it. Subpanels will remain collapsed or expanded on future visits to the module.
  - Note: Administrators can choose to disable collapse stickiness or to collapse all subpanels by default via Admin > System Settings. For more information, please refer to the System documentation in the Administration Guide.
- Column Widths : Place your cursor on the column divider. When the double arrow cursor appears, click and drag the column to the desired size. Please note that the column width will not be preserved when you navigate away from the page.
- Column Sort : Click a column header to sort the subpanel's items by that value. Clicking the same header again will reverse the sorting order (e.g. from ascending to descending).
- More Records : By default, Sugar displays up to five records in each subpanel though administrators can alter the number via Admin > System Settings as described in the System documentation of the Administration Guide. If additional related records exist, click "More {Module Name}..." (e.g. "More campaign log...") at the bottom of the subpanel to load the next set of records.

Campaign	Activity Type	Activity Date	Related
<a href="#">Summer 2015 Specials</a>	Message Sent/Attempted	2015-08-05 09:51	<a href="#">Summer 2015 Specials</a>
<a href="#">Summer 2015 Specials</a>	Message Sent/Attempted	2015-08-05 09:51	<a href="#">Summer 2015 Specials</a>

[More campaign log...](#)

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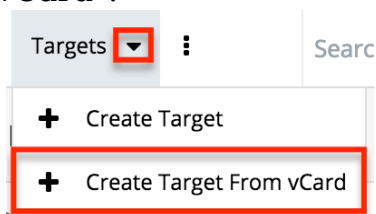
## vCards and Targets

vCards are electronic business cards that are exchanged between applications such as email and web browsers. Targets may be created from vCards generated by another application or saved as vCards for use in other software.

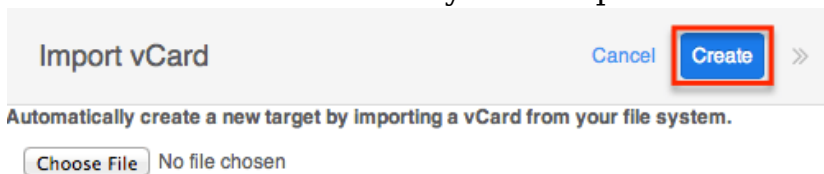
### Creating Targets via vCard

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

1. Click the triangle in the Targets module and select "Create Target From vCard".



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



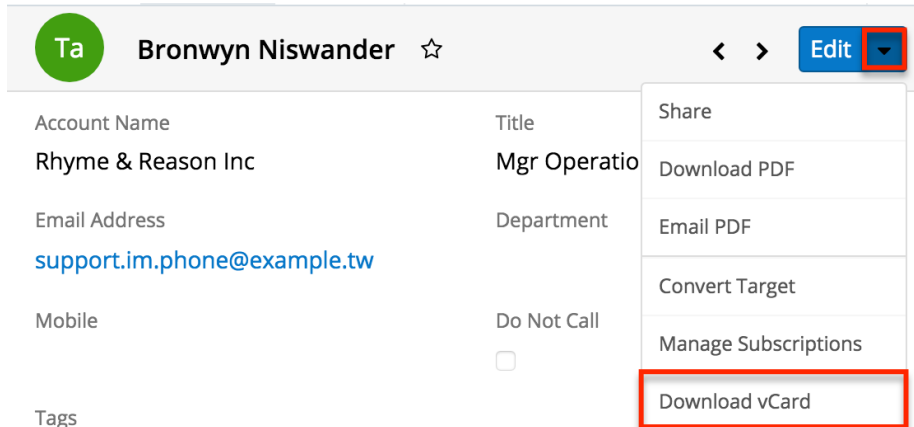
### Downloading a Target's vCard

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

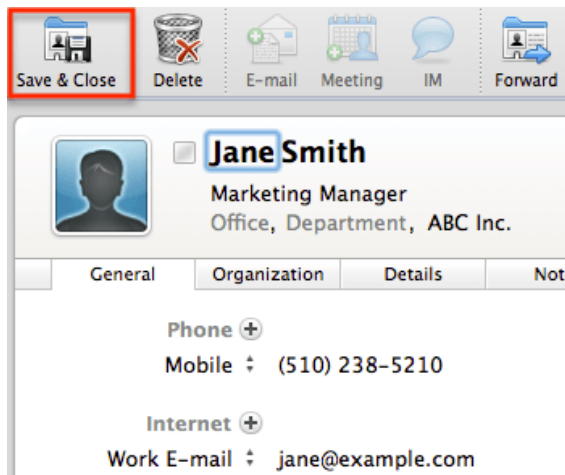
1. Navigate to a Targets record view.
2. Select "Download vCard" from the Actions menu to download the vCard file.







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



Last Modified: 2018-01-24 18:55:11

## Target Lists

### Overview

Target lists are used by Sugar's Campaigns module as collections of individuals or organizations you want to include or exclude in a campaign. Each campaign relates to several target lists, and each target list relates to any number and combination of targets, contacts, leads, users, and accounts. In turn, each of these records can be a part of multiple target lists, each of which may represent sound grouping of recipients based on relevant criteria such as age group, geographical location, or industry. The target list's type controls whether it is a list of recipients, a list of records who should be excluded, a list of test recipients, or a list of internal recipients. For more information regarding campaigns, please refer to the

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Campaigns documentation. This documentation will cover information and actions specific to the Target Lists module. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting target lists, please refer to the Working With Target Lists section of this page.

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

## Target Lists Fields

The Target Lists module contains a number of stock fields, which come out-of-the-box with Sugar. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

Field	Description
Assigned To	The Sugar user assigned to the target list
Date Created	The date the target list record was created
Date Modified	The date the target list record was last modified
Description	A description or other information about the target list
Name	The name or designation of the target list
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports Note: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the target list
Total Entries	The total count of records (contacts, leads, targets, users, and accounts) belonging to a target list. This number will update automatically and cannot be

	<p>edited manually.</p> <p>Note: You must refresh the record view page to update the Total Entries field after adding records to the target list.</p>
Type	The type of the target list (e.g. default, test, etc.)
Domain Name	<p>The name of the domain to exclude from the campaign recipient list (e.g. "example.com"). All email addresses containing the domain name will not receive the campaign email.</p> <p>Note: This field only displays when "Suppression List - By Domain" is selected for the Type field.</p>

## Target List Types

A target list can specify individuals or organization who need to be included in a campaign or excluded from a campaign. This can be controlled using the following target list types:

Target List Type	Description
Default	A list of people who are the primary recipients of the campaign email
Seed	<p>A list of people who need to receive the campaign email but not be tracked in the campaign statistics</p> <p>Note: This list is typically used for internal purposes where the individuals in this group need to approve the campaign before it is launched. The seed list is ignored in the campaign's View Status page.</p>
Suppression List - By Domain	<p>A list of people who should be excluded from the campaign email recipient list and whose email addresses share a common domain name, such as "website.com"</p> <p>Note: Suppression by domain can be used to prevent marketing to entire organizations such as competitors.</p>
Suppression List - By Email Address	A list of people who should be excluded

	<p>from the campaign email recipient list</p> <p>Note: This list typically consists of people who chose to opt out from receiving your campaign message.</p>
Suppression List - By Id	<p>A list of people who should be excluded from a Newsletter-type campaign email recipient list</p> <p>Note: The "Suppression List - By Id" must be related to the Newsletter campaign in order for the message's opt-out link to function properly.</p>
Test	<p>A list of people who receive test email campaigns to make sure that the message's layout is displayed properly before the campaign is finalized and sent to the default list</p> <p>Note: A campaign may be sent to the test list multiple times by using the Delete Test Entries button on the View Status page between re-sends.</p>

## Working With Target Lists

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 Target Lists section describe Target Lists-specific behaviors and functionality.

Content Link	Description
<p>Creating Target Lists</p> <p>Basic Target List Creation</p> <p>Creating via Subpanels</p> <p>Creating via Duplication</p>	<p>The Creating Records section covers the various methods of creating new target list records, including via the Create button in the Target Lists module, via the Target Lists subpanel on campaigns, and via duplication of an existing target list record.</p>
<p>Viewing Target Lists</p> <p>Viewing via List View</p> <p>Viewing via Record View</p> <p>Viewing via Recently Viewed</p> <p>Viewing via Preview</p>	<p>The Viewing Records section describes the various methods of viewing target list records, including via the Target Lists list view and record view, the Recently Viewed menu in the Target Lists module tab, and previewing target lists in the right hand side panel.</p>

<p>Searching for Target Lists  Global Search  List View Search  Creating a Filter  Saving a Filter</p>	<p>The Searching for Records section provides an introduction to the two searching methods for locating target lists: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Target Lists module.</p>
<p>Target Lists List View  Total Record Count  Create Button  List View Search  Checkbox Selection  Mass Actions Menu  Favorite Designation  Column Reordering  Column Resizing  Column Sorting  Column Selection  Preview  Record Actions Menu  More Target Lists  Dashboards</p>	<p>The List View section walks through the many elements of the Target Lists List View layout which contains a filterable list of all target list records in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Target Lists list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.</p>
<p>Target Lists Record View  Favorite Designation  Next or Previous Record  Actions Menu  Subpanels  Related Record Subpanels  Filtering Subpanels  Reordering Subpanels  Dashboards</p>	<p>The Record View section walks through the many elements of the Target Lists Record View layout which contain detailed information about a single target list record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Target Lists record view are described in the Record View Actions Menu section of this page.  Note: In the Users subpanel on a target list record view, regular users can link or unlink any active user record but can only inline edit their own user record. Administrators can inline edit, link, and unlink any active user record via the Users subpanel.</p>
<p>Editing Target Lists  Editing Inline via Record View  Editing via Record View  Editing Inline via List View  Mass Editing via List View</p>	<p>The Editing Records section describes the various methods of editing existing target list records, including inline via the Target Lists record view, in full edit mode on the record view, inline via the</p>

Editing Fields	Target Lists list view, and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.
Deleting Target Lists Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted target lists, including via the Target Lists record view, an individual record's Actions menu on the Target Lists list view, and the Mass Actions menu on the list view.
Exporting Target Lists	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of target lists and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).
Merging Target Lists Merging via List View	The Merging Records section provides instructions for merging duplicate target lists which will combine field values and related records into a single target list.
Favoriting Target Lists Favoriting via List View Favoriting via Record View	The Favoriting Records section describes the various methods of marking target lists as favorites, including via the Target Lists list view or Target Lists record view. Favoriting a target list allows you to easily access it from list views, dashlets, or the Target Lists module tab.
Sharing Target Lists	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the target list record. If the recipient is logged into Sugar, clicking the link will bring them directly to the target list's record view.

## Target Lists Menus

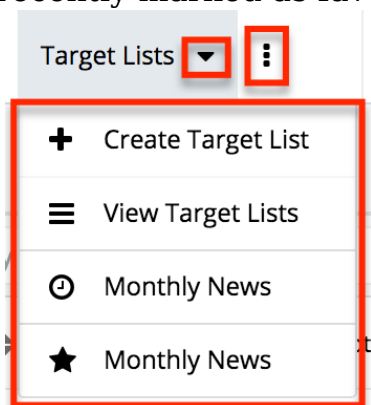
The Target Lists module contains various options and functionality which are available via menus in the module tab, list view, and record view. The following

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sections present each menu and its options with links to more information about each option in the User Interface documentation or, for Target Lists-specific functionality, within this page.

## Module Tab Menus

The Target Lists module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Target Lists" to access the list view. Once the Target Lists tab is visible in the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of target lists you most recently viewed. The Favorites menu displays the list of target lists you most recently marked as favorites.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Target List	Opens the record view layout to create a new target list
View Target Lists	Opens the list view layout to search and display target lists

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

- The Target Lists module may be marked as hidden in your user preferences, which will prevent it 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 Target Lists module in the Hide Modules list, simply move it to the Display Modules list. For more information on hiding and displaying modules, please refer to the Layout Options section of the Getting Started documentation.

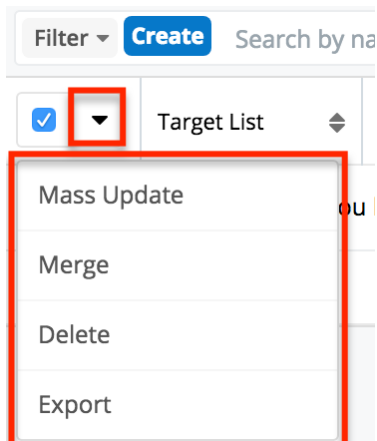
- The administrator may have disabled the Target Lists module for your entire Sugar instance. Reach out to your Sugar administrator to have the Target Lists module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation in the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

## List View Menus

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

### List View Mass Actions Menu

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



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

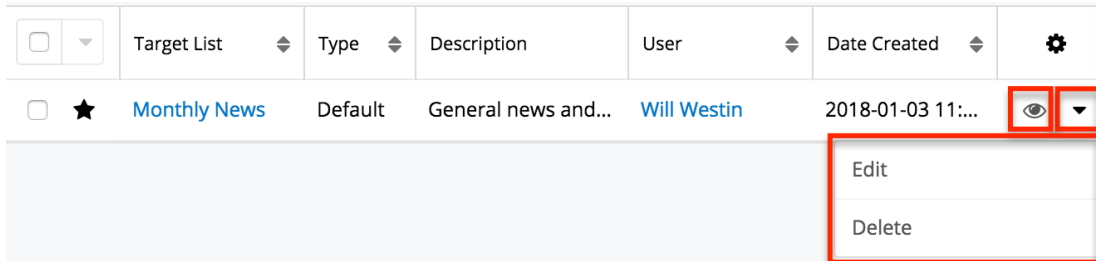
Menu Item	Description
Mass Update	Mass update one or more target lists at a time
Merge	Merge two or more duplicate target lists
Delete	Delete one or more target lists at a time
Export	Export one or more target lists to a CSV file



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## List View Record Actions Menu

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

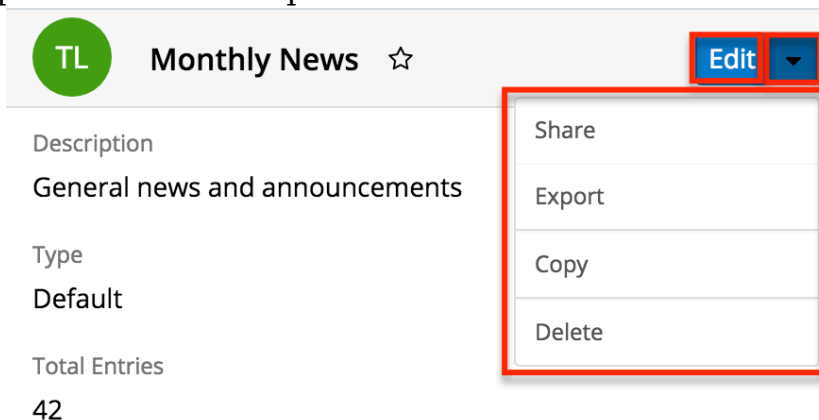


The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this target list in the intelligence pane
Edit	Edit this target list
Delete	Delete this target list

## Record View Actions Menu

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



The Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this target list
Share	Share a link to this target list via email
Export	Export the members (i.e. contacts, leads, targets, users, and accounts) of this target list to a .csv file
Copy	Duplicate this target list to create a new target list
Delete	Delete this target list

## Populating Target Lists

A target list consists of a group of individuals or organizations (e.g. targets, contacts, accounts, etc.) you wish to be included or excluded on a mass marketing campaign. These targets are typically identified based on a set of predetermined criteria such as being a prospect or existing customer, age group, industry, etc. There are various ways to populate a target list in Sugar including using the Add to Target List option from a module's list view, selecting records from the subpanel in the Target Lists record view, etc. You can use the Select All feature in the module's list view when adding to a target list, which will allow you to easily select the first 1000 records in the result set. If you wish to add more than 1000 records or add a specific group of records to the target list, please use the filter option in the list view search to perform the additions in smaller batches.

Please note that if you have multiple targets with the same email address, Sugar will send the campaign email to only one of the targets, chosen at random. The other email addresses which are considered duplicates will be suppressed even though they are not on the opt-out list.

### Populating via Individual Selection

The record view of each target list will display the Targets, Contacts, Leads, Users, and Accounts subpanels. Users have the option to select and add the desired targets directly via these subpanels.

The following steps cover populating a target list with contacts via the Target Lists record view as an example:

1. Navigate to a target list's record view.
2. Scroll to the Contacts subpanel and choose "Link Existing Record" from the

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subpanel's Action menu.

3. Locate and select the desired record from the Search and Select Contacts page.

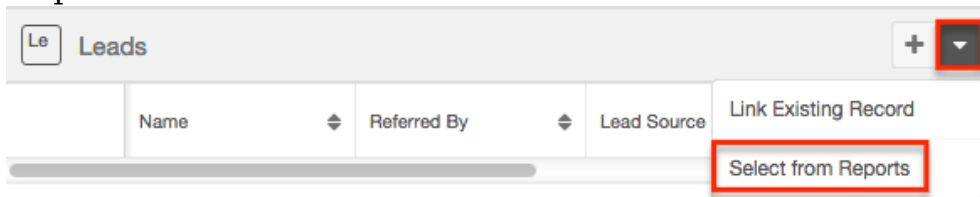
Once the contacts have been selected, you will see the records within the Contacts subpanel of your target list's record view.

## Populating via Reports

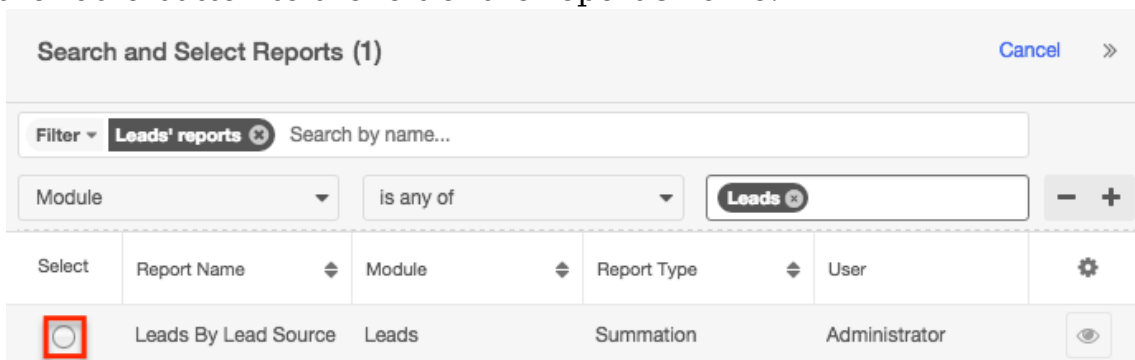
The record view of each target list will display the Targets, Contacts, Leads, Users, and Accounts subpanels. You can select and add the desired targets from an existing report directly to the target list via these subpanels.

The following steps cover populating a target list by selecting a report based on the Leads module as an example:

1. Navigate to a target list's record view.
2. Scroll to the Leads subpanel and choose "Select from Reports" from the subpanel's Action menu.



3. Reports based on the Leads module will display on the Search and Select Reports page. Select the report you wish to add to the target list by clicking the radio button to the left of the report's name.



Once the report has been selected, the lead records from the report results will display in the Leads subpanel. To add more records to the target list, simply use the Select from Reports option again and choose a different report.

Leads (5 of 6+)					+	▼
	Name	Referred By	Lead Source	Office Phone		
☆	Eneida Chiles		Campaign	(341) 264-5808	👁	▼
☆	Liana Beighley		Self Generated	(595) 528-9141	👁	▼
☆	Manie Hebron		Email	(503) 215-9979	👁	▼
☆	Hector Throneberry		Trade Show	(811) 688-6338	👁	▼
☆	Piedad Brow		Existing Customer	(840) 432-2266	👁	▼

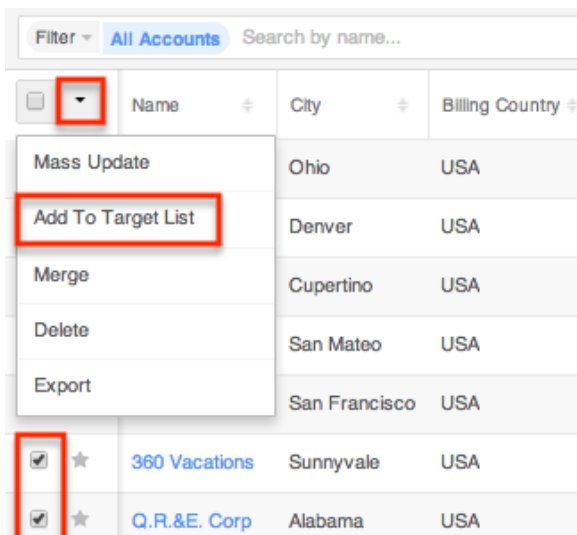
[More leads...](#)

## Populating via Module List View

You can select records directly from the Accounts, Contacts, Leads, and Targets list views to add them to a target list.

The following steps cover populating a target list by selecting records from the Accounts list view as an example:

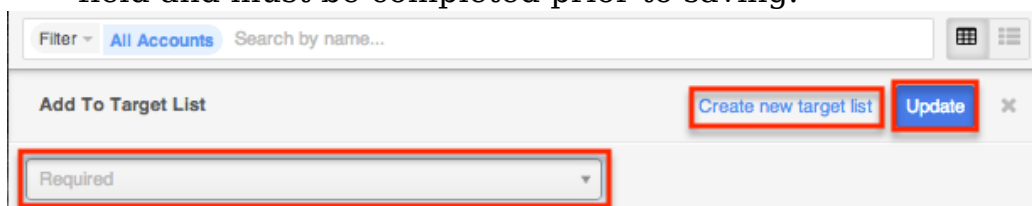
1. Navigate to the Accounts list view by clicking the Accounts module tab.
2. Use the List View Search to find the Account record(s) you wish to add.
3. Select the desired account record(s) then choose "Add to Target List" from the Actions menu.



4. The Add To Target List panel will appear below the search bar. Search and select the desired target list from the dropdown list or create a new target list by clicking "Create new target list".
  - If creating a new target list, enter appropriate values for the fields in the

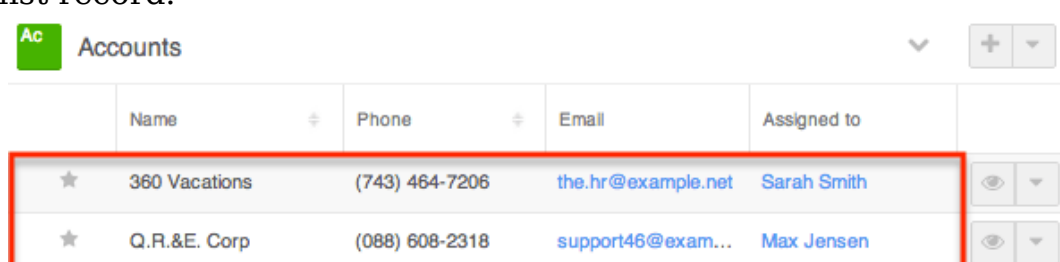
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record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.



5. Once the appropriate target list is selected or created, click "Update" to add the account records to the target list.

The selected account records will appear in the Accounts subpanel of the target list record.



	Name	Phone	Email	Assigned to	
★	360 Vacations	(743) 464-7206	the.hr@example.net	Sarah Smith	👁️
★	Q.R.&E. Corp	(088) 608-2318	support46@exam...	Max Jensen	👁️

## Populating via Importing Targets

The Target Lists module does not have an import option, but you can import targets via the Targets module. While performing the import, users have the option to add the targets to a target list. For more information on how to import records into Sugar, please refer to the Import documentation.

Use the following steps to populate a new or existing target list with newly imported targets:

1. Click the triangle in the Targets module tab and select "Import Targets".
2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. On Step 6 of the import process, click the Add to Target List button.

## Step 6: View Import Results

### Summary

20 records were created

### Targets

Email ▾

Name ⇅	Title ⇅
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7. A popup window will open with the option to select an existing target list or create a new target list.
  - If adding to an existing target list, search and select the desired target list from the window.
  - If creating a new target list, enter appropriate values for the fields in the record view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.

### Target Lists Search

Target List <input type="text"/>	Type <input type="text"/>	<input type="button" value="Default"/> <input type="button" value="Seed"/> <input type="button" value="Suppression List - By"/> <input type="button" value="Suppression List - By"/> <input type="button" value="Suppression List - By"/> <input type="button" value="Test"/>
<input type="checkbox"/> My Items	<input type="checkbox"/> My Favorites	<input type="button" value="Search"/> <input type="button" value="Clear"/>

### Target Lists

Target List ⇅	Type ⇅	Description ⇅	User ⇅
Direct Marketing-Indiana	Default	Direct marketing prospects for the state of Indiana	Administrator

Once the appropriate target list is selected or created, the newly imported targets will appear in the Targets subpanel of the target list record.

Targets					
	Name	Title	Email	Phone	
★	Fred Miller	Director of Sales	fred@example....	(415) 238-1860	👁️ ▼
★	John Smith	Marketing Man...	john@example....	(510) 615-7890	👁️ ▼

## Exporting Target List Members

In addition to exporting target list records from the Target Lists list view, Sugar allows you to export the members of a target list from the Target Lists record view. This allows users to download all fields for the members of the selected target list to their computers in a CSV format.

Use the following steps to export the members of a target list via the target lists record view:

1. Navigate to a target list's record view.
2. Click the Actions menu and select "Export".

The screenshot shows a record view for a target list named "Monthly News". The record details include a description "General news and announcements" and a type "Default". An "Edit" button is visible in the top right corner. A dropdown menu is open, showing options for "Share", "Export", and "Copy". The "Export" option is highlighted with a red box, indicating it is the selected action.

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

Last Modified: 2018-01-03 19:35:42

## Campaigns

### Overview

Sugar's Campaigns module can be used to create and manage email and non-email marketing and advertisement campaigns for your organization. Email-based

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campaigns can be used to send mass emails or a series of newsletter emails to individuals with whom you have an active or growing relationship. The results of each campaign are recorded to measure the success of your campaigns.

## Campaign Fields

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

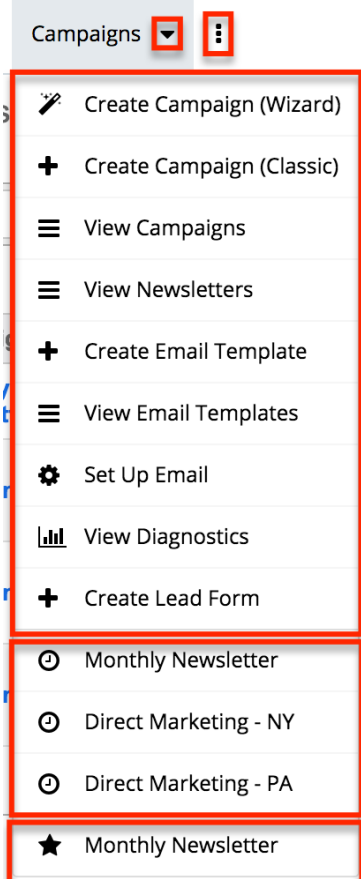
Field	Description
Actual Cost	The total cost of the campaign
Assigned To	The Sugar user assigned to the campaign record
Budget	The budgeted amount for the campaign's cost
Currency	The currency of the campaign costs
Description	A description or other information about the campaign
Date Created	The date the campaign record was created
Date Modified	The date the campaign record was last modified
End Date	The date the campaign is expected to end
Expected Cost	The expected cost of the campaign
Expected Revenue	The expected revenue stemming from the campaign
Frequency	For newsletter-type campaigns, the frequency the campaign is expected to be sent
Impressions	The expected number of recipient views
Name	The name of the campaign record
Objective	The objective or purpose of the campaign
Start Date	The date the campaign is expected to



	start
Status	The current status of the campaign  Note: This field is manually set, not automatic.
Teams	The Sugar team(s) assigned to the campaign
Type	The campaign's format or type (e.g. email, web)

## Campaigns Module Tab

The Campaigns module tab is typically found by clicking the "More" icon represented by three vertical dots to the right of the module tabs on the navigation bar. The additional modules will appear on the list and you can click "Campaigns" to access the list view. Once the Campaigns tab displays on the navigation bar, you can click the triangle within the tab to display the Actions, Recently Viewed, and Favorites menu. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the campaigns, target lists, and targets you last viewed in the module. The Favorites menu displays the list of campaigns you most recently marked as favorites in the module.



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

Menu Item	Description
Create Campaign (Wizard)	Opens the campaign wizard to create a new campaign
Create Campaign (Classic)	Opens the edit view layout to create a new campaign
View Campaigns	Opens the list view layout to search and display campaigns
View Newsletters	Opens the list view layout to search and display newsletter-type campaigns
Create Email Template	Opens the Email Templates edit view layout to create a new email template
View Email Template	Opens the Email Templates list view layout to search and display email templates
Set Up Email	For users with administrator access, opens the email setup for campaigns wizard
View Diagnostics	Displays your system's configuration status for sending email-based campaigns
Create Lead Form	Opens the Lead Form wizard to generate a web-to-lead form

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

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

## Prerequisites

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There are several key components involved when executing an email or newsletter campaign in Sugar. Before sending out an email-based campaign, an administrator must make sure the following items are set up properly:

- **Outbound Emails** : Configure Sugar to send outbound emails via Admin > System Email Settings. For more information on configuring outbound email, please refer to Set Up Email below or to the Email documentation in the Administration Guide.
- **Campaign Batch Size** : Specify the number of emails sent per batch via Admin > Campaign Email Settings. Due to some email providers throttling the number of emails allowed to be sent at one time, we recommend setting this to 200 and adjusting as necessary. For more information on configuring the campaign batch size, please refer to Set Up Email below or to the Email documentation in the Administration Guide.
- **Bounce Handling Account** : Create the bounce-handling inbox for bounced campaign emails via Admin > Inbound Email. For more information on configuring the bounce handling account, please refer to the Email documentation in the Administration Guide.
- **Campaigns Scheduler** : Configure the scheduler job that automatically sends campaign emails via Admin > Schedulers > Run Nightly Mass Email Campaigns Scheduler. The frequency of this scheduler should be determined in conjunction with the campaign batch size to ensure you do not exceed sending limitations imposed by your email provider. For more information on configuring schedulers, please refer to the Schedulers documentation in the Administration Guide.
- **Bounced Emails Scheduler** : Configure the scheduler job to process the bounced campaign emails via Admin > Schedulers > Run Nightly Process Bounced Campaign Emails Scheduler. For more information on configuring schedulers, please refer to the Schedulers documentation in the Administration Guide.

Note: The Run Nightly Mass Email Campaigns and Run Nightly Processed Bounced Campaign Emails schedulers are configured by default to run every night on the hour from 2:00 AM to 6:00 AM for the time zone of the admin user (User Id = 1). For quicker processing of campaign information we recommend changing both schedulers to run every 10 minutes throughout the day. Please note that if your email provider throttles the number of emails allowed to be sent in a given time period, you may need to reduce the frequency of sending.

## Set Up Email

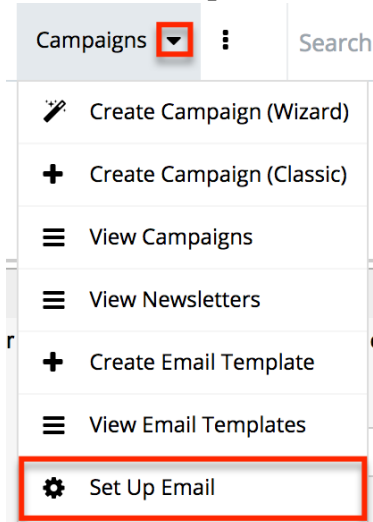
In addition to navigating directly to the email settings on the Administration page, you can also configure Sugar's email settings for campaigns via the Set Up Email

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option in the Campaigns module tab. This launches a wizard that walks through entering all of the relevant information for email set up. Please note that the Set Up Email option is only available to administrators and only needs to be configured once for your Sugar instance.

Use the following steps to configure email settings via the Campaigns module:

1. Click the triangle in the Campaigns module tab to open the Actions menu and select "Set Up Email".



2. Enter the appropriate values specific to your email server in the fields on the Setup Email page. Please note that any values entered on this page will affect the system-wide email settings in Admin > System Email Settings. Click "Next".
  - Note: All required fields (e.g. From Name, From Address, SMTP Server, etc.) are marked with a red asterisk and must be completed.

A screenshot of the 'Setup Email' configuration page. At the top, there are 'Cancel' and 'Next' buttons, with the 'Next' button highlighted by a red box. Below the buttons is a form with the following fields: 'From Name: \*' (text input with 'SugarCRM'), 'Mail Transfer Agent:' (dropdown menu with 'SMTP'), 'From Address: \*' (text input with 'abc@example.com'), 'SMTP Server \*' (text input with 'smtp.gmail.com'), and 'SMTP Port \*' (text input with '587'). The left sidebar shows 'Setup Email' as the active tab, with 'New Mail Account' and 'Summary' as sub-sections.

3. Enter the appropriate information to set up your bounce-handling email account on the New Mail Account page. Click "Next".
  - Note: A message will display if you already have an existing bounce-handling account, but you can mark the Create New Mail Account checkbox if you wish to create another one.

Back Cancel **Next**

[Setup Email](#)  
[New Mail Account](#)  
 Summary

**New Mail Account**

1 Mail account(s) with bounce handling were detected. You do not need to create a new one, but you can still do so below.

Mail Account Name:	User Name	Monitored Folder	Mail Server Address	Status
Bounce Handling	sugartest	INBOX	imap.gmail.com	Active

Create New Mail Account

Mail Account Name: \*  "From" Address:

Mail Server Address: \*  User Name: \*

Mail Server Protocol: \*  Password: \*

Mail Server Port: \*  Monitored Folder: \*

Use SSL:

4. The Summary page will display a summary of the information you entered on the previous steps. Click "Save" to preserve your changes.

Back Cancel **Save**

[Setup Email](#)  
[New Mail Account](#)  
 Summary

**Summary**

From Name: SugarCRM

From Address: admin@example.com

Number of emails sent per batch: 500

Location of campaign tracking files (like campaign\_tracker.php): Value of Config.php setting site\_url

SMTP Server: smtp.gmail.com

SMTP Port: 587

SMTP Username: admin@example.com

Enable SMTP over SSL or TLS?: TLS

Mail Account Name: SugarCRM

Mail Server Address: smtp.gmail.com



## Campaign Diagnostic Tool









The campaign diagnostic tool enables you to check if all pending administrative tasks have been completed before you attempt to launch the campaign. It is recommended that the Campaign Diagnostic tool be run prior to sending out campaigns to ensure any issues get resolved before the campaign emails need to be sent.

Use the following steps to run the campaign diagnostic tool:

1. Click the Actions menu in the Campaigns module tab and select "View

Diagnostics".

Campaigns   Search

-  Create Campaign (Wizard)
-  Create Campaign (Classic)
-  View Campaigns
-  View Newsletters
-  Create Email Template
-  View Email Templates
-  Set Up Email
-  View Diagnostics

- 2. Sugar will check your instance's email and scheduler configuration and display warnings if any additional configuration is necessary. Administrator users will also see links (e.g. Launch Email Setup) to appropriate sections of the Administration page to correct the issues.
  - o Note: If you are not an administrator user, please reach out to your system administrator to have the issues looked into and resolved accordingly. For more information on the required elements for campaigns, please refer to the Prerequisites section above.

Campaign Diagnostics



Email Components

Please configure your system email address. E-mail Settings have not been configured or are invalid.

1 Mail account(s) with bounce handling detected: .

Mail Account Name:	User Name	Monitored Folder	Mail Server Address	Status
Bounce Handling	sugartest	INBOX	imap.gmail.com	Active

[Launch Email Setup](#)



Scheduler Components

Schedulers detected

Scheduler	Status
Run Nightly Process Bounced Campaign Emails	Active
Run Nightly Mass Email Campaigns	Active

[Re-Check](#)

- 
3. Once all necessary configurations have been completed, click the Re-Check button to re-run the campaign diagnostic tool.

## Campaign Types

Sugar supports many different types of campaigns. The main types and their differences are as follows:

- **Newsletter** : A series of mass emails sent to a consistent or growing target list periodically or on a regular basis. Each newsletter is intended to be managed on a subscription basis and is normally targeted towards individuals with whom you have an existing relationship. The Frequency field is only available for campaigns with the type set to "Newsletter". Recipients opting out of newsletter-type campaigns are added to that campaign's unsubscription list but will still be able to receive other campaigns' emails.
- **Email Campaign** : A one-time or series of mass emails sent to a target list. Email campaigns are typically targeted towards a wide audience with the intention of lead generation. Recipients opting out of email-type campaigns have their email address marked as "opt-out" and are prevented from receiving any future campaign emails.
- **Non-email based Campaign** : A non-email mass marketing effort delivered via mail, web, radio, television, print, or telesales. These campaigns are not executed through Sugar, but you can create a campaign record and manually update send dates and results for record keeping and to assess return on investment.
  - **Note:** Non-email based campaigns will not display Tracker URLs and Email Marketing subpanels in the detail view.

## Creating Campaigns

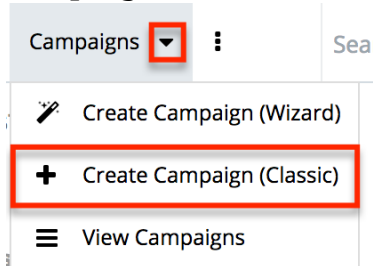
There are two primary methods for creating a campaign in Sugar: the Create Campaign (Classic) option and the Create Campaign (Wizard) option. When using the classic option, you will create the campaign record then add the target list and create tracker URLs as well as an email marketing record via the related subpanels below the campaign's detail. The classic option is recommended for simplicity and empowering users to make modifications to the campaign later. The campaign wizard option will walk you through getting the campaign created step-by-step. Each step of the campaign set-up process will guide users on the items (Tracker URLs, Target List, Marketing, etc.) that need to be completed.

### Creating Via Classic Option

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Creating a campaign using the classic method opens the Campaigns edit view where you may enter the basic campaign information. Use the following steps to create a campaign via the classic option:

1. Click the Actions menu in the Campaigns module tab and select "Create Campaign (Classic)".



2. Enter appropriate values for the fields in the edit view layout which will help identify the campaign. All required fields are marked with a red asterisk and must be completed prior to saving.
  - Note: The status, start date, and end date entered on this screen are for your records only and will not control when the actual email campaign will be executed.
3. Once the necessary information is entered, click "Save".

Create

^ Overview

Name: *	<input type="text" value="Direct Marketing-Ohio"/>
Start Date:	<input type="text" value="06/02/2014"/> <input type="button" value="Calendar"/> (mm/dd/yyyy)
End Date: *	<input type="text" value="06/13/2014"/> <input type="button" value="Calendar"/> (mm/dd/yyyy)

Once the campaign record is created, scroll to the related subpanels below the campaign's detail to add the target list and create the tracker URLs as well as an email marketing record.

## Creating Via Duplication

You can also create a new campaign by duplicating an existing campaign record. The Copy option is useful if the campaign you are creating has similar information to an existing campaign. When duplicating a campaign, the campaign data, and the related target lists will copy over, but the original campaign's tracker URLs and Email Marketing records will not be related to the new campaign.

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



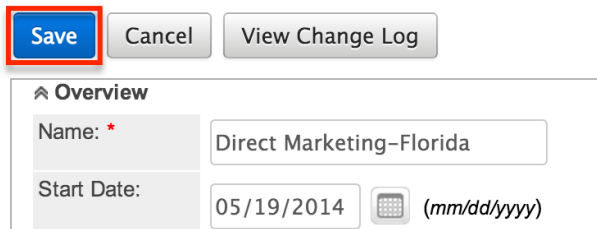
1. Navigate to a campaign record's detail view.
2. Click the Actions menu and select "Copy".

Direct Marketing-New York ☆



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

Create



Once the campaign record has been created, scroll to the related subpanels below the campaign's detail to add the target list and create the tracker URLs as well as an email marketing record.

## Creating Target Lists

A target list consists of a collection of individuals or organizations you want to include or exclude in a mass marketing campaign. Target lists can contain any number and combination of contacts, leads, targets, users, and accounts. You have the option to associate existing target lists with your new campaign or to create new target lists during the campaign creation process.

The target list type determines some specific functionality within the campaign. The available target list types are "Default", "Seed", "Suppression List", and "Test". Default and Seed-type target lists will receive emails when campaigns are sent. Test-type target lists will receive emails when campaigns are tested.

Sugar will also create some target lists for you by default. For example, when selecting a campaign type of "Newsletter", Sugar automatically generates three target lists for the campaign: default-type "Subscription List", suppression by ID-type "Unsubscription List", and test-type "Test List". Please note that these three target list types are required for the Newsletter campaign. You may add additional target list types to the campaign as necessary. If you wish to remove the system generated target list types (e.g. suppression by ID-type "Unsubscription

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List"), please keep in mind that you must replace it with the same target list type (e.g. Suppression List - By Id).

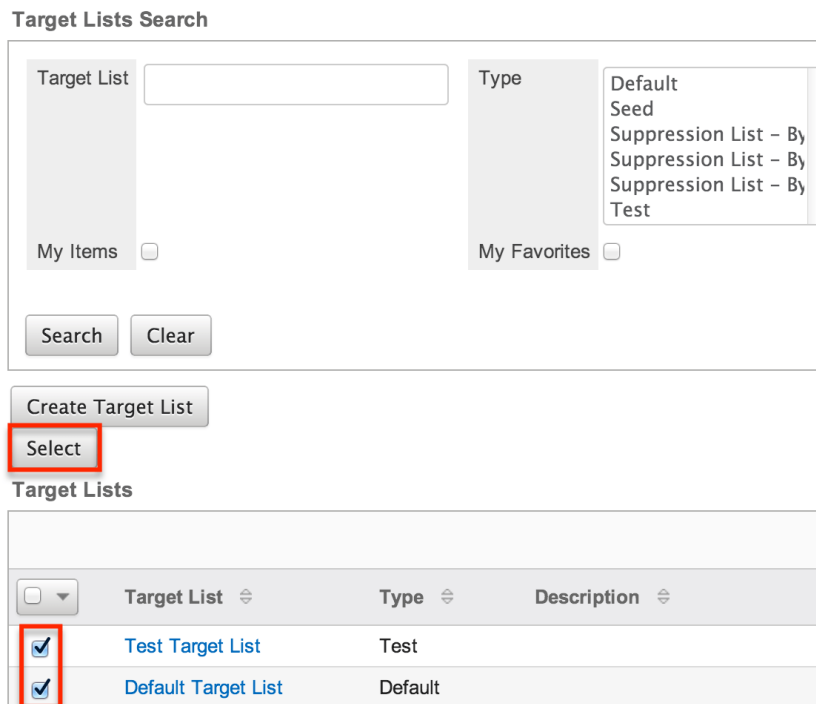
For more information about target lists, please refer to the Target Lists documentation.

Use the following steps to add an existing target list to your campaign via the Target List subpanel on the Campaigns detail view:

1. Navigate to the Target List subpanel.
2. Choose "Select" from the Actions menu.
  - Note: Click the Create button if you wish to create a new target list for the campaign.



3. Locate and select the name of the desired target list in the pop-up window. To add several target lists at once, mark the specific record's corresponding checkbox then click "Select".



## Creating Tracker URLs

Tracker URLs are special links for your email template that you can insert in place

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of standard links to help you understand how your recipients are engaging with the campaign message. If you choose to create your links as tracker links, then Sugar will log your recipients' clicks by assigning each tracker link a unique key and routing the link through Sugar before loading the final URL in their browser. The click-through results are reportable and visible via the Campaign Status page for your email campaign.

Tracker URLs can redirect recipients to public URLs such as a page on your website, to a Sugar web-to-lead form, or to an opt-out page which suppresses the recipient's email address from future mailings from the current list in Sugar. Once you send a campaign that contains tracker URLs, you can see how many recipients clicked each link and who those recipients are via the Campaign Response Subpanel on the View Status page for the campaign.

The following sections explain how to create different types of tracker URLs (i.e., redirect and opt-out) and insert them into your email template.

### Creating Redirect Tracker URLs

Tracker URLs pass clicks from the email message through your Sugar instance before arriving at their final destination. This allows the clicks to be tracked by your campaign, which provides visibility into how your recipients are responding to the campaign.

Redirect tracker URLs can appear as text or images in your campaign email and, when clicked, will steer your recipient to the URL of your choice: a page on your website, a targeted advertisement, or even a web-to-lead form where they can provide details that will be saved as a Sugar lead record. For more information on web-to-lead forms, please refer to the Web To Lead Forms documentation.

Use the following steps to create a redirect URL via your campaign's detail view:

1. Navigate to the Tracker URLs subpanel.
2. Click the Create button to create a new tracker URL.



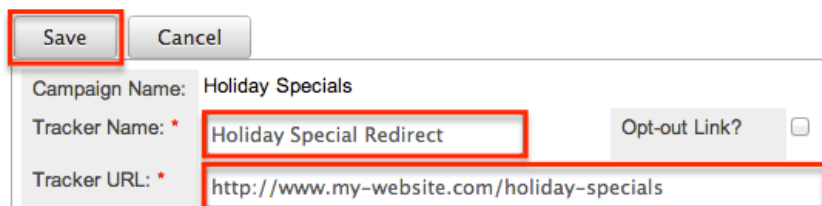
3. Enter appropriate values in the fields on the page. All required fields are marked with a red asterisk and must be completed.  
Tracker Name : Enter an internal name for the tracker URL.  
Opt-out Link : Leave this box unchecked.

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Tracker URL : Enter the destination URL where recipients will be directed to after clicking the link in the email.

4. Click "Save" to create the tracker URL record.

#### Campaign Trackers



The screenshot shows a form titled "Campaign Trackers". At the top left, there are two buttons: "Save" (highlighted with a red box) and "Cancel". Below the buttons, the form contains the following fields:

- Campaign Name: Holiday Specials
- Tracker Name: \* Holiday Special Redirect (highlighted with a red box)
- Opt-out Link?
- Tracker URL: \* http://www.my-website.com/holiday-specials (highlighted with a red box)

You can now insert this tracker URL into the email template of your choice. For more information on adding redirect URL links to your template, please refer to the Inserting Tracker URLs section of this documentation.

### Creating Opt-Out Tracker URLs

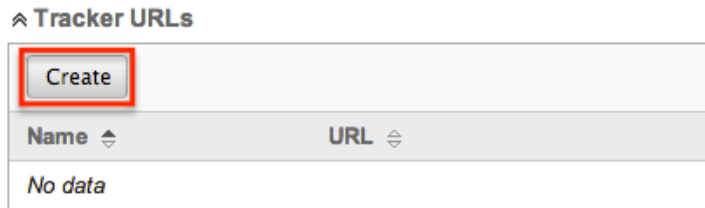
You can create an opt-out tracker URL to embed an Unsubscribe link in the campaign email which will allow the targets to opt out of your campaign mailing list. Please note that you will need to manually add the opt-out link by inserting the tracker URL in the email template. If an opt-out link is not included in the email template, Sugar will add a default opt-out link to the bottom of your campaign email.

Please note that both the newsletter-type and email-type campaigns include opt-out links, but the behavior of each is different. For more information on how the opt-outs work for each campaign type, please refer to the Understanding Campaign Opt Outs article.

When a recipient clicks the opt-out link in the email, a new browser tab will open to confirm that the recipient has elected to opt out of receiving campaign emails. Please note that administrators can modify the confirmation message that appears by changing the LBL\_ELECTED\_TO\_OPTOUT label via Admin > Studio > Campaigns > Labels. For more information on modifying labels, please refer to the Studio documentation in the Administration guide. Any recipients who have elected to opt out of receiving campaign emails will be listed in the Opted Out subpanel of the Campaign Status page.

Use the following steps to create an opt-out link via your campaign's detail view:

1. Navigate to the Tracker URLs subpanel.
2. Click the Create button to create a new tracker URL.



3. Enter appropriate values in the fields on the page. All required fields are marked with a red asterisk and must be completed.
  - Tracker Name : Enter an internal name for the tracker URL.
  - Opt-out Link : Mark the checkbox so that this link will be used to allow recipients to opt out.
  - Tracker URL : This is defaulted and disabled for opt-out links.

#### Campaign Trackers

4. Click "Save" to create the opt-out tracker URL record.

You can now insert this tracker URL into the email template of your choice. For more information on adding an opt-out link to your template, please refer to the Inserting Tracker URLs section of this documentation.

## Creating Email Marketing Records

When you create an email campaign, you must also create an Email Marketing record that specifies the body of the message in the form of an email template, which bounce-handling account will catch automated replies from invalid email addresses, and which target lists will receive this particular mass email of your campaign.

When you are sending more than once from a single campaign, both newsletter-type and email-type campaigns will need a new Email Marketing for each subsequent send. For example, a monthly newsletter campaign will have 12 Email Marketing records created in a year, each one with a different email template with the same target lists. Or, if you wish to send an introductory email to all of your newest prospects every 3 months, this email-type campaign will have 4 Email Marketing records created in a year, each one using the same email template but different target lists. Sugar will not allow the same Email Marketing record to be sent to a recipient more than once.

Use the following steps to create an Email Marketing record via your campaign's

detail view:

1. Click the Create button to create a new email marketing record.

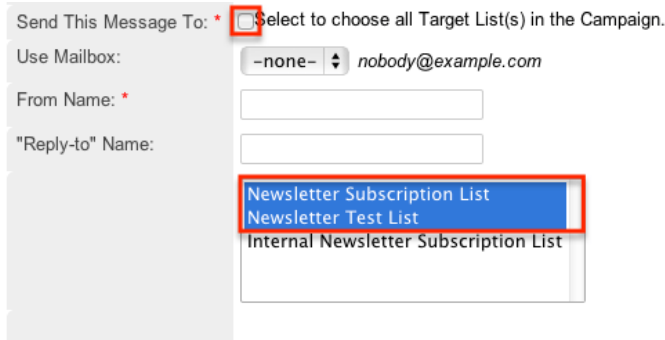


^ Email Marketing

Create

Name	Start Date
No data	

2. Complete the fields as follows. All required fields are marked with a red asterisk and must be completed.
  - o Name : Enter an internal name for the email marketing record.
  - o Status : Select "Active" from the dropdown. Only active Email Marketing records may be sent.
  - o Start Date & Time : Enter a date and time when the emails need to begin sending. This start date and time must have passed before the campaign may be queued for delivery.
  - o Email Template : Select or create an email template. For more information on creating an email template, please refer to the Creating Email Templates section of this documentation.
  - o Send This Message To : Check this box to send this email to all target lists that are associated with this campaign or select individual target lists via the multiselect box below.



Send This Message To: \*  Select to choose all Target List(s) in the Campaign.

Use Mailbox:  nobody@example.com

From Name: \*

"Reply-to" Name:

- Newsletter Subscription List
- Newsletter Test List
- Internal Newsletter Subscription List

- o Use Mailbox : Select the bounce handling account that will catch automated replies from invalid email addresses.
- o From Name : This will automatically populate based on the selected bounce handling account. You can enter a different name that will appear as the email's From name.
- o From Email Address : This will automatically populate based on the selected bounce handling account. You can override the field to enter a different email address that the campaign will be sent from. Please note that your system outbound email account may need to grant specific 'Send As' permissions if you wish to use a From email address that differs from the address set up in Admin > System Email Settings. If these permissions are not granted, emails may fail to send or the authenticated email account will be imposed in place of the address

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depending on your mail server settings. Also, if the From address entered is not configured as a bounce handling email address in Sugar, you will not see the results of the bounced emails in your campaign's Status page.

- "Reply-to" Name : This field will automatically populate if a Reply-to name is provided on the bounce handling account. You can override the Reply-to name to a different one so that any replies on the email campaign can be addressed to this name on the email.
- "Reply-to" Address : This field will automatically populate if a Reply-to address is provided on the bounce handling account. Please note that if any recipients reply back to the email campaign, it will be sent to this email address on the bounce handling account by default. You can override the Reply-to address for the campaign to a different one so that any replies can be sent to a specific email address where it can be better monitored.

3. Click the Save button to complete the creation of the Email Marketing record.

Create Email Marketing

The screenshot shows a form titled "Create Email Marketing". At the top, there are two buttons: "Save" and "Cancel". The "Save" button is highlighted with a red rectangular box. Below the buttons is a form field labeled "Name: \*" with a red asterisk indicating it is a required field. The text "Holiday Sales WK1" is entered into this field.

## Creating Email Templates

Email templates contain the design and content of the emails your campaign will send. Placeholder variables can be added to the template for field values like the target name so you can personalize the email to your recipients. Creating an email template through the Campaigns module rather than via the Emails module sets the template's type to "Campaign" and allows you to add redirect and opt-out tracker URLs.

Use the following steps to create an email template from the Email Marketing record:

1. While creating or editing your campaign's Email Marketing record, click "Create" to the right of the Email Template dropdown.

Create Email Marketing

The screenshot shows the "Create Email Marketing" form with several fields filled out. At the top, there are "Save" and "Cancel" buttons. Below them, the "Name: \*" field contains "Holiday Sales WK1". The "Start Date & Time: \*" field is set to "12/02/2013" at "5:00 pm". The "Status: \*" dropdown is set to "Active". The "Email Template: \*" dropdown is set to "-none-". A red box highlights the "Create" button at the end of the form. A small asterisk with the text "\* Indicates required fie" is visible in the top right corner.

2. Enter the appropriate values for the fields in the pop-up window. The

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required field is marked with a red asterisk and must be completed.

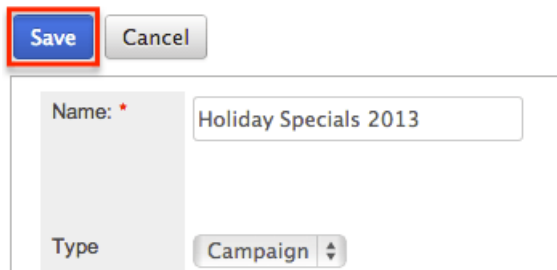
- Name : Enter an internal name for the email template.
  - Teams : Select the Sugar team(s) assigned to the email template.
  - Type : This will automatically populate as "Campaign".
  - Description : Enter a description or other information about the template.
  - Insert Variable : Insert variables or placeholders into the template. For more information regarding inserting variables, please refer to the Inserting Variables section.
  - Insert Tracker URL : Insert a tracker URL or opt-out link into the template. For more information regarding inserting tracker URLs, please refer to the Inserting Tracker URLs section.
  - Subject : Enter the subject of the emails that will be sent.
  - Body : Enter the body of the emails that will be sent.
3. Using the TinyMCE functions, add simple formatting to your email's content. For more advanced customization you can click the HTML button in the top left to access and edit the generated HTML code.

Note: Only inline CSS may be used in email templates. Inline CSS is a method of using CSS within your HTML content instead of storing it in an external CSS file. So, every HTML element must be styled using inline CSS by virtue of the "style=" declaration.



4. Click "Save" to preserve your changes to the email template.

Create

A screenshot of the 'Create' dialog box. At the top, there are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box. Below the buttons, there is a 'Name' field with a red asterisk and the text 'Holiday Specials 2013'. Below that is a 'Type' dropdown menu with 'Campaign' selected.

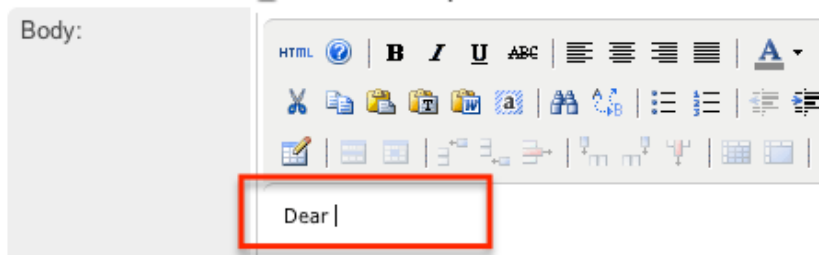
## Inserting Variables

When constructing the subject and body of your email, Sugar allows you to insert variables, or placeholders, into the template that will be populated with the record's information for that variable.

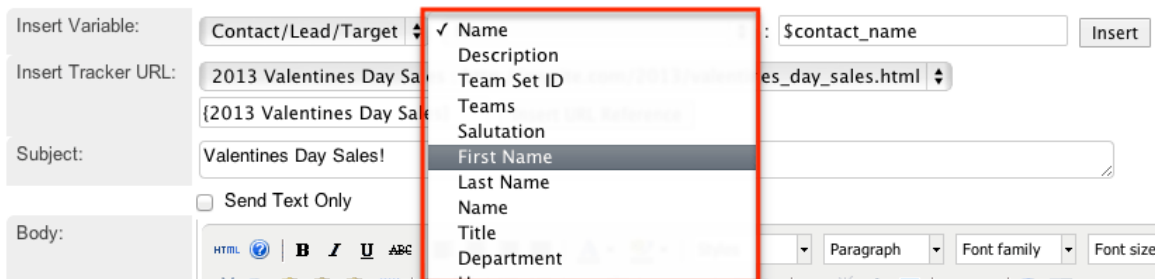
Use the following steps to insert a variable for the recipient's first name into the template:



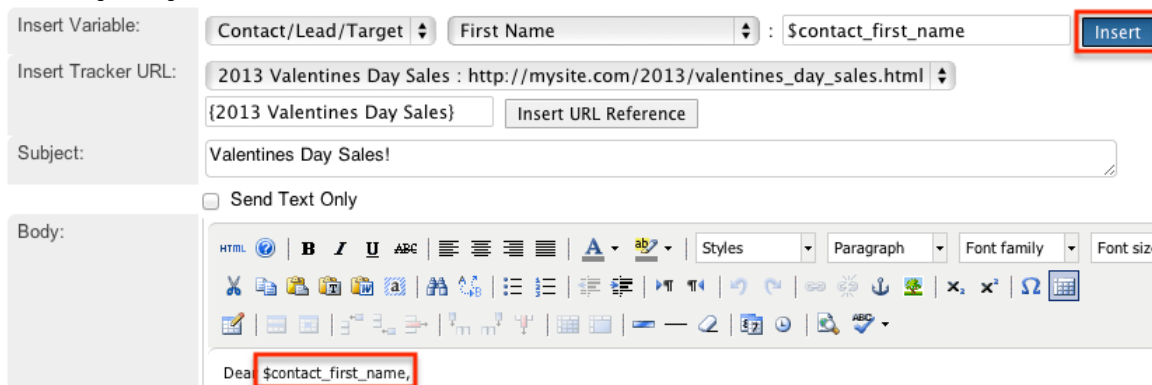
1. Click to place your cursor on the location in the subject or body where the recipient's first name should appear.



2. In the Insert Variable row, the first dropdown defaults to "Contact/Lead/Target" which will allow you to insert fields from the associated person-type recipient's record.
3. Set the second dropdown to the desired field (e.g. First Name) from the modules selected in the first dropdown.



4. Click the Insert button to insert the generated variable name to your subject or body at your cursor's location.

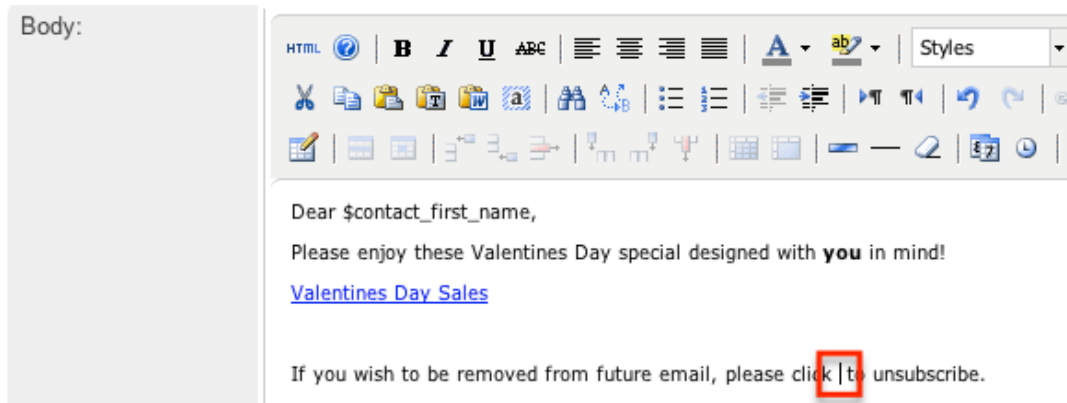


## Inserting Tracker URLs

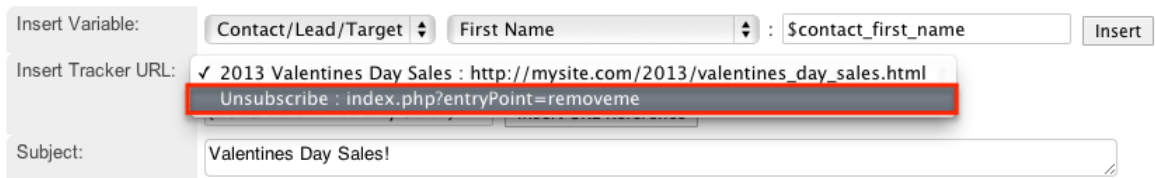
When constructing the body of your email, Sugar also allows you to insert redirect or opt-out tracker URLs.

Use the following steps to insert a tracker URL or opt-out link into the template.

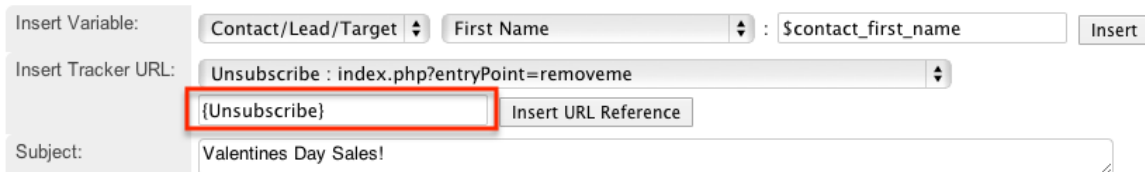
1. Click to place your cursor on the location in the body where the link should appear.



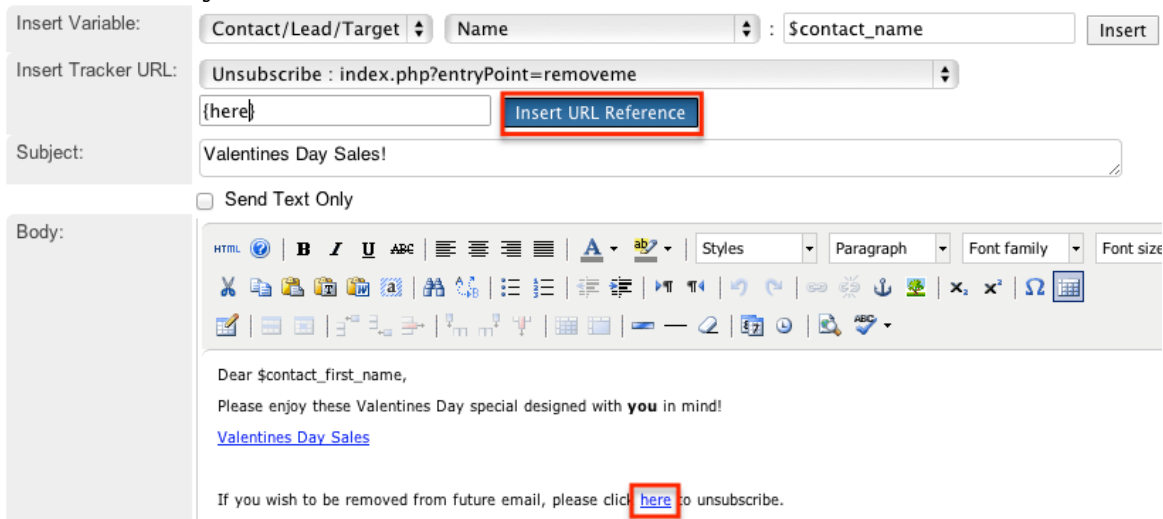
2. Select the link you wish to add from the Insert Tracker URL dropdown.
  - Note: For more information on creating tracker URLs, please refer to the Creating Tracker URLs section.



3. Type the text you wish to appear as a link between the curly brackets in the text box to the right of the dropdown.



4. Click the Insert URL Reference button to place the link in the body of the email where your cursor is located.



After sending the email campaign, you can see how many people and who exactly clicked on which links in your email message via the campaign's View Status page.

## Testing Campaigns

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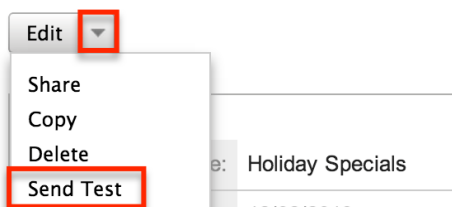
Before you launch an email or newsletter campaign, it is recommended that you perform tests to check how different email clients display the campaign message. A test-type target list must be selected under the Target Lists subpanel as well as in the Email Marketing record in order to test the campaign.

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

Use the following steps to test an email-based campaign:

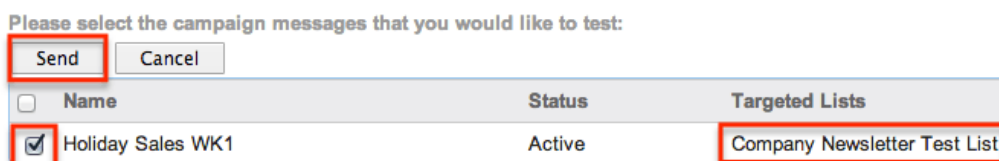
1. Navigate to a campaign record's detail view.
2. Select "Send Test" from the Actions menu.

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3. Select the Email Marketing record and test target list combination that you would like to test and click "Send".
  - Note: If an Email Marketing record does not have a test-type target list associated to it, then the Targeted Lists section will remain empty and no test emails will be sent.

Campaign: Send Test



You can send the campaign to the test target list multiple times by clicking the Delete Test Entries button on the View Status page. You will need to do this after each test in order to delete the log entries on the campaign status and allow Sugar to send to the test list recipients again. Please note that sending to these recipients again will be prevented until the previous test's entries have been deleted. Also, please be sure that the test entries are all deleted once the campaign is ready to be sent so that the statistics from the test will not be included in the actual campaign's results.

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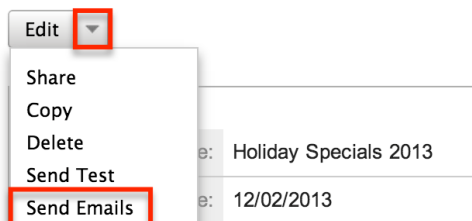
## Sending Campaigns

Once the Sugar email settings are configured and your campaign has been tested successfully, you are now ready to send the campaign. Upon sending a campaign, the emails are queued to be sent out at intervals. The administrator can configure how many emails are sent and when to send them. For more information on the relevant configurations, please refer to the Prerequisites section.

Use the following steps to send an email-based campaign:

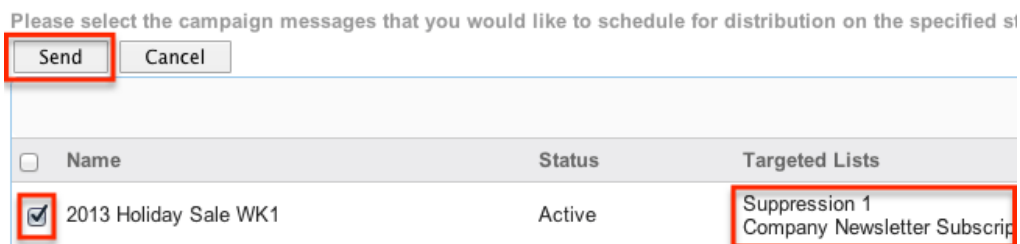
1. Navigate to a campaign record's detail view.
2. Select "Send Emails" from the Actions menu.

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3. Select the Email Marketing record and default target list that you would like to receive the email campaign then click "Send".
  - Note: If the email marketing record does not have a default-type target list associated to it, then the Targeted Lists section will remain empty and no emails will be sent.

Campaign: Send Emails



The specified start date and time on the email marketing record must have passed before the campaign will be queued for delivery. Once the emails enter the queue in Admin > Email Queue, the relevant scheduler will send the emails in set batches on an interval configured by an administrator. For more information on the email queue, please refer to the Email documentation in the Administration guide. For more information on the schedulers used by the Campaigns module, please refer to the Prerequisites section.

## Viewing Campaign Status

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After you launch a campaign, you can view its results on the Campaign Status page to gauge its impact and progress. The Campaign Status page includes several subpanels, which display information such as the recipients who viewed the message, the recipients who clicked a tracker URL in the email, how many leads and contacts were created from the campaign, etc. This enables you to evaluate the effectiveness of the campaign.

Use the following steps to view the Campaign Status page:

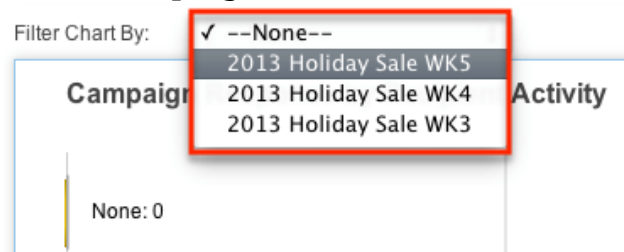
1. Navigate to a campaign record's detail view.
2. Click the View Status button on the upper right of the page.

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## Campaign Status Chart

This is a visual representation of the counts of your recipient's activities which are also detailed in the below subpanels. Use the dropdown to view a particular Email Marketing record's data or choose "--None--" to view the cumulative results of all of this campaign's sends.



## Message Queue Subpanel

The Message Queue subpanel shows the campaign emails waiting to be sent in the email queue. The emails will remain in the queue until the start time of the Email Marketing record has passed and the scheduler picks up and sends them in batches as specified in Admin > Campaign Email Settings. For more information on batch size, please refer to the Prerequisites section. For more information on monitoring this queue, please refer to the Email documentation of the Administration guide.

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#### Message Queue

Recipient Name	Recipient Email	Marketing Id	Send On
Carmella Belew	Carmella.Belew@email.co	2013 Holiday Sale WK1	02/11/2013 01:00am
Robert Smith	robert.smith@email.co	2013 Holiday Sale WK1	02/11/2013 01:00am

## Campaign Response Subpanels

The success of a campaign can be determined by analyzing the response statistics. Knowing how many of your targets saw your email, clicked its links, and became leads or contacts, for example, can provide insight into your campaign strategy.

#### Message Sent/Attempted

Recipient Name	Recipient Email	Marketing Id	Activity Type	Activity Date
Robert Smith	robert.smith@email.co	2013 Holiday Sale WK1	Message Sent/Attempted	02/26/2013 12:14pm

The following subpanels measure different aspects of your recipient's responses to the campaign or a specific send of the campaign based on your selection in the Filter Chart By dropdown at the top of the page:

- Message Sent/Attempted : The list of campaign emails that were sent out to targets.
- Viewed Message : The list of targets who viewed the emails that were delivered. Sugar includes a very small, invisible image in each email. Each time the recipient downloads this image, Sugar records that they viewed the email.
- Click-thru Link : The list of targets who clicked on a redirect tracker URL in the email. This does not include opt-outs. For more information on redirect tracker URLs, please refer to the Creating Tracker URLs section.
- Leads Created : The list of leads who have been generated from a web-to-lead form assigned to this campaign record.
- Contacts Created : The list of contacts who have been converted from a lead generated from a web-to-lead form assigned to this campaign record.
- Bounced Messages, Invalid Email : The list of campaign emails that bounced back due to invalid email addresses.
- Bounced Messages, Other : The list of campaign emails that failed to send despite having valid email addresses. After six failed attempts, these messages will be removed from the queue.
- Opted Out : The list of targets who chose to opt out of receiving campaign emails by clicking the opt-out link.
  - Note: Opt-out links for newsletter-type and email-type campaigns behave

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differently. When a target clicks an opt-out for a newsletter-type campaign, they are prevented from receiving future emails from that specific campaign by being added to the campaign's suppression-type list. When clicking an opt-out for an email-type campaign, they are prevented from receiving future emails from any campaign by having their email address marked as "Opted Out" on their Sugar record. For more information, refer to the Understanding Campaign Opt Outs article.

- **Suppressed by Email Address or domain** : The list of email addresses which were not sent the campaign email because they had previously opted out, were a member of a suppression list, or were invalid addresses.

Note: If you do not see the campaign response subpanels, the administrator may have disabled the Campaign Log subpanels for your entire Sugar instance. Reach out to your Sugar administrator to have the Campaign Log subpanels displayed. For more information on displaying and hiding subpanels throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Campaign Results Subpanels

The last three subpanels on the Campaign Status page can be used to demonstrate the broader effects of the campaign by showing what new accounts, leads, and opportunities were generated as a result of the effort.

### Accounts



Name	City	Billing Country:	Phone	
<a href="#">XY&amp;Z Funding Inc</a>	Cupertino	USA	(233) 381-4991	edit
<a href="#">Tortoise Corp</a>	Ohio	USA	(471) 905-7799	edit
<a href="#">T-Cat Media Group Inc</a>	Santa Fe	USA	(992) 954-1698	edit
<a href="#">NW Bridge Construction</a>	Los Angeles	USA	(021) 980-0180	edit

- **Accounts** : The list of accounts that are related to this campaign record either through lead generation and then conversion or manually related through the Campaign field on the account's record view.
- **Leads** : The list of leads that are related to this campaign record either through lead generation or manually related through the Campaign field on the lead's record view.
- **Opportunities** : The list of opportunities that are related to this campaign record either through lead generation and then conversion or manually related through the Campaign field on the opportunity's record view.

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## Viewing Campaign ROI

For campaigns (Email and Newsletter) that are executed through Sugar, you can view the campaign's return on investment by clicking the View ROI button in the Campaigns detail view. The return on investment chart displays the actual revenue you earned through the campaign versus the estimated expected revenue. It also reflects the actual cost you incurred by executing the campaign versus the budget that you set for the campaign. The budget, actual cost, and expected revenue amounts entered in the campaign overview screen are displayed as bars in the campaign return on investment chart. The actual revenue is calculated from the campaign's related opportunities that have a sales stage of "Closed Won".

Use the following steps to view a campaign's ROI:

1. Navigate to a campaign record's detail view.
2. Click the View ROI button on the upper right of the page.

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Edit ▾

Launch Wizard

View Status

View ROI

## Viewing Campaigns

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

### Viewing Via List View

The Campaigns list view displays all campaign records meeting the current search criteria. To access the list view, simply click the Campaigns tab. While list view shows key campaign fields, you can click the campaign's name to open the record in detail view. For more information on viewing campaigns via list view, please refer to the Campaigns List View section.

### Viewing Via Detail View



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

## Viewing Via Recently Viewed

As you work, Sugar will keep track of which campaigns you have recently viewed. Click the Actions menu in the Campaigns Module Tab to see a list of your most recently viewed campaigns and click each name to open the Campaigns detail view.

## Viewing Via Dashlets

Sugar dashlets allow users to get a quick view of various records, reports, etc. Dashlets may be added to a user's Home page or to the intelligence pane for modules (e.g. Accounts) using the Sidecar user interface. You can view campaign information in List View dashlets specific to the Campaigns modules (e.g. My Campaigns dashlet), as well as List View dashlets based on other modules such as "My Contacts". Clicking a campaign's name from any dashlet will open the Campaigns detail view. For more information on using dashlets and viewing campaign records via dashlets, please refer to the Dashboards and Dashlets documentation.

My Campaigns							My Contacts				
Name	Status	Type	End Date	Team:	User	Date C	Name	Title	Account Name	Email	Campaign
Direct Marke...	Active	Email	06/20/2014	Global	Max Jensen	05/14	Tonya Abhram	IT Developer	Powder Supp...	sugar.qa.inf...	Direct Marke...

## Viewing Via Reports

Users with access to the Reports module have the option to build, generate, and manage various reports in Sugar. You can generate reports to gather key data regarding your campaigns plus information for related records. You also have the option to filter the report based on the campaign and related module(s) to only include records that is of importance. The display columns will only show data for fields (e.g. campaign name, type, related leads etc.) that you choose specifically when creating the report. Once the report is run, you will be able to view the campaign record's detail view by clicking the campaign's name in the report

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results. Please note that you can only click into campaign records for Rows and Columns Report and Summation Report with Details Report type. The other two report types (Summation Report, Matrix Report) are summation reports and do not include display columns with hyperlinks (e.g. Campaign Name) to allow for navigating to campaign record detail views. For more information on viewing campaign records via the Reports module, please refer to the Reports documentation.

## Searching Campaigns

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

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

### Basic Search

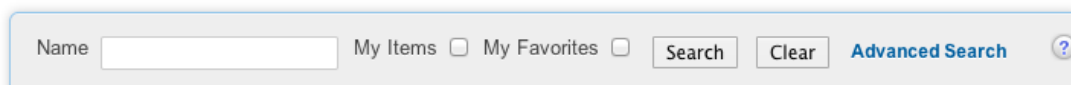
Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

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

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

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## Search Campaigns



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

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

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

## Advanced Search

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

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

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

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## Search Campaigns

The screenshot shows a search interface for campaigns. It includes several filter fields: 'Name' (text input), 'Start Date' (dropdown set to 'Equals' and a date input field with a calendar icon and '(mm/dd/yyyy)' placeholder), and 'End Date' (dropdown set to 'Equals' and a date input field with a calendar icon and '(mm/dd/yyyy)' placeholder). There are also multiselect dropdowns for 'Status' (options: Planning, Active, Inactive, Complete, In Queue), 'Type' (options: Telesales, Mail, Email, Print, Web), and 'Assigned to' (options: Administrator, Chris Olliver, Jim Brennan, Max Jensen, Sally Bronsen, Sarah Smith). Below these is a 'My Favorites' checkbox. At the bottom, there are 'Layout Options', a 'Save search as:' field with a 'Save' button, and a 'Modify current search:' section with 'Update' and 'Delete' buttons. At the very bottom, there are 'Search', 'Clear', 'Basic Search', and 'Saved Searches' (with a dropdown menu showing '-none-') buttons.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. For example, if you select "My Favorites" and enter a campaign's name to search, Sugar will only return campaign records with a matching name that you have marked as favorites. When searching by a multiselect or dropdown field (e.g. "Assigned to"), however, Sugar will return records matching any of these selections. Once the search completes, the relevant results will populate in the list view below the search panel. To see all campaign records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.

Please note that you will only be able to see campaign records as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. Administrators can configure what fields appear on the Campaigns Advanced Search via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Global Search

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

To use global search, you need to first enter the keyword into the search box and the pop-up results will begin appearing once you enter in at least one character. Clicking the magnifying glass icon or hitting your Return/Enter key will cause Sugar to return exact matches for your keyword rather than matches with words beginning with your keyword.

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For more information on using and configuring Global Search, please refer to the Global Search section of the Search documentation.

Regular Sugar users can configure some aspects of global search such as what modules are displayed in the search results by clicking the down arrow within the Search box then selecting the module(s) to include in the search. For more information on configuring your Global Search, please refer to the Search documentation.

Administrators can control additional elements of global search via Admin > Search and Admin > Studio. For more information on administrator configuration of Global Search, please refer to the Field Options section of the Studio documentation as well as the Search section of the System documentation in the Administration guide.

## Campaigns List View

The Campaigns list view displays all campaign records meeting the current search criteria to which your user has access. You can view the basic details of each campaign within the field columns. Please note that you will only be able to see campaign records as allowed by your team membership, user access type, and assigned roles.

For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide. You have the option to change what fields are displayed in list view by configuring your layout options in the Campaigns Advanced Search.

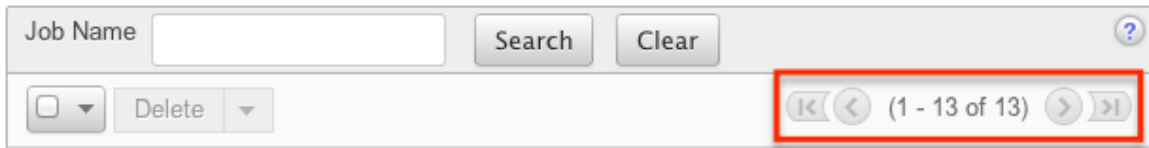
For more information on configuring your list view, please refer to the Layout Options section of the Search documentation. Users with administrator or developer access also have the ability to change what fields are visible in the list view via Admin > Studio. For more information on editing list view layouts, please refer to the Studio documentation in the Administration guide.

## Pagination

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

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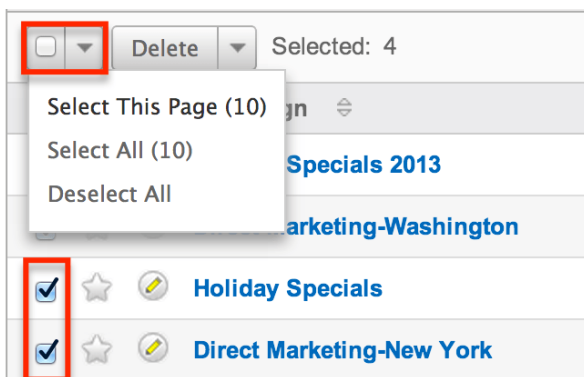
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.



## Checkbox Selection

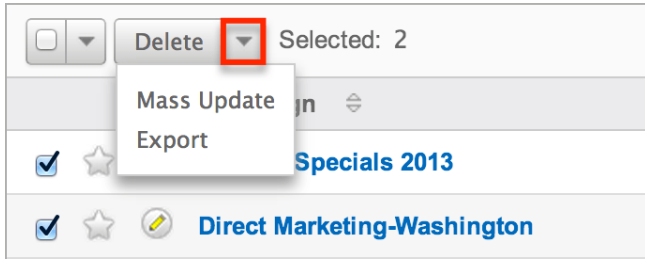
You can perform several actions on campaign records directly from the list view by first selecting the desired records. To select individual campaign records on the Campaigns list view, mark the checkbox on the left of each row. To select or deselect multiple campaign records on the list view, use the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

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



## Actions Menu

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

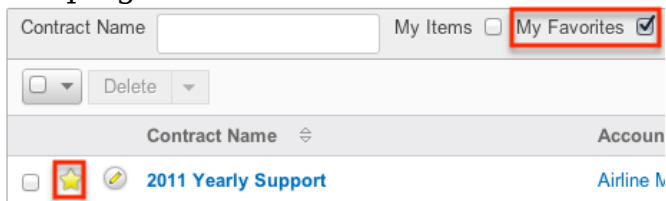


The options in the actions menu allow you to perform the following operations:

Menu Item	Description
Delete	Delete one or more campaigns at a time
Mass Update	Mass update one or more campaigns at a time
Export	Export one or more campaigns to a CSV file

## Favorite Designation

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



## Campaign Status

Each campaign's status page may be accessed directly from the list view by clicking the Chart icon on the right of each list view row. For more information on the campaign status page, please refer to the Campaign Status section of this documentation.

Campaign	Status	Type	End Date	User	Date Created
<input type="checkbox"/> <input type="star"/> <input type="pencil"/> Newsletter	Active	Newsletter	03/29/2013	Administrator	03/26/2013 12:06pm

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## Campaign Wizard

The Campaign Wizard may be directly accessed from the list view by clicking the Wand icon on the right far right of each list view row. For more information regarding the Campaign Wizard, please refer to the Using the Campaign Wizard section of this documentation.

Campaign	Status	Type	End Date	User	Date Created
<input type="checkbox"/> <input type="star"/> <input type="edit"/> Newsletter	Active	Newsletter	03/29/2013	Administrator	<input type="info"/> <input type="wand"/> 03/26/2013 12:06pm

## More Information

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

Campaign	Status	Type	End Date	User	Date Created
<input type="checkbox"/> <input type="star"/> <input type="edit"/> Newsletter	Active	Newsletter	03/29/2013	Administrator	<input type="info"/> <input type="wand"/> 03/26/2013 12:06pm

## 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.

	Document Name	File Name
<input type="checkbox"/> <input type="star"/> <input type="edit"/>	2013-04-Flight Plan	2013-04-Flight Plan.docx
<input type="checkbox"/> <input type="star"/> <input type="edit"/>	2013-05-Flight Plan	2013-05-Flight Plan.docx

## Campaigns Detail View

The Campaigns detail view displays thorough campaign information including all campaign fields which are grouped by default into the Overview and Other panels.



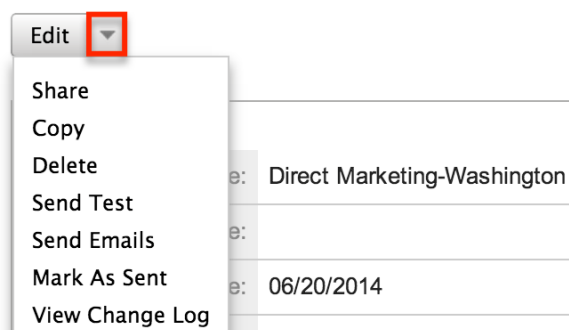
You can also view a campaign's related records which appear in subpanels beneath the campaign fields. The detail view can be reached by clicking a campaign record's link from anywhere in the application including from the Campaigns list view.

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

## Actions Menu

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

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


Menu Item	Description
Edit	Edit this campaign
Share	Share a link to this campaign via email
Copy	Duplicate this campaign
Delete	Delete this campaign
Send Test	Send test emails for this campaign
Send Emails	Send all emails for this campaign
Mark As Sent	Mark a non-email campaign as being

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	sent
View Change Log	View a record of changes to this campaign

## Favorite Designation

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

2013 Yearly Support 

Edit ▾



⌵ Overview  
Contract Name: 2013 Yearly Support

## Next or Previous Record

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

Direct Marketing-Ohio 

Edit ▾

 (1 of 2) 

## Related Record Subpanels

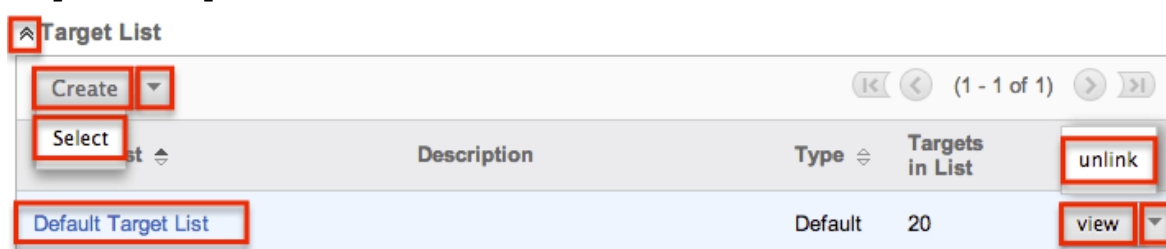
Every campaign record's detail view will display subpanels which list related records from other modules. Users with administrator or developer access have the ability to change the fields (e.g. Name, Assigned User, etc.) and labels of each subpanel by configuring the layout via Admin > Studio to provide visibility to the

---

most important fields. For more information on modifying subpanels, please refer to the Studio documentation in the Administration guide.

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

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



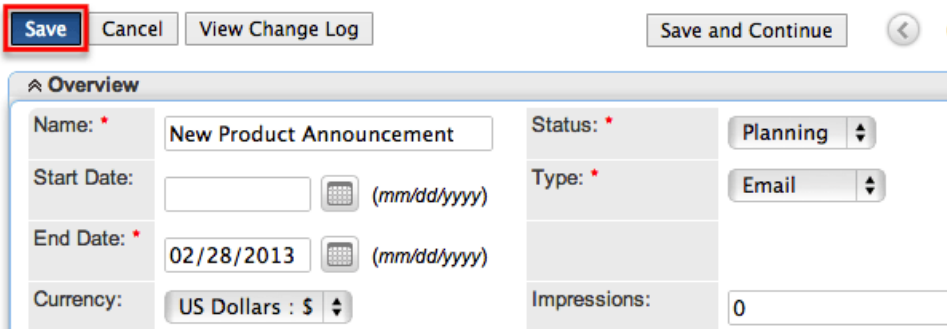
Please note that administrators can prevent users from moving subpanels to different locations in the detail view. For more information on preventing rearranging of subpanels, please refer to the System documentation in the Administration guide. Check with your system administrator if you are not able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

## Editing Campaigns

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

[New Product Announcement](#) »  Edit



Save Cancel View Change Log Save and Continue

**Overview**

Name: *	New Product Announcement	Status: *	Planning
Start Date:	<input type="text"/> (mm/dd/yyyy)	Type: *	Email
End Date: *	02/28/2013 (mm/dd/yyyy)		
Currency:	US Dollars : \$	Impressions:	0

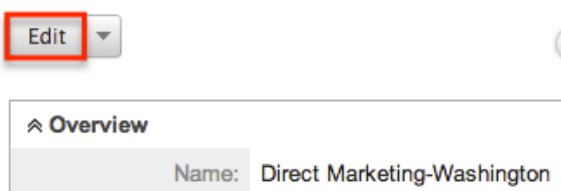
Please note that your ability to edit campaigns in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation. Check with your system administrator if you do not see the Edit options.

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

## Editing Via Detail View

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

[Direct Marketing-Washington](#) ☆



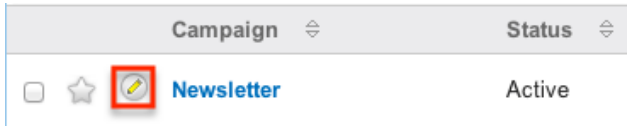
Edit

**Overview**

Name: Direct Marketing-Washington

## Editing Via List View

You can edit campaigns via the list view by clicking the pencil icon to the left of each campaign's name. The edit view layout will open and you can update the necessary fields then click "Save" to preserve your changes.



## Deleting Campaigns

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

Please note that your ability to delete campaigns may be restricted by a role.

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

### Deleting Via Detail View

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

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

Direct Marketing-New York ☆



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

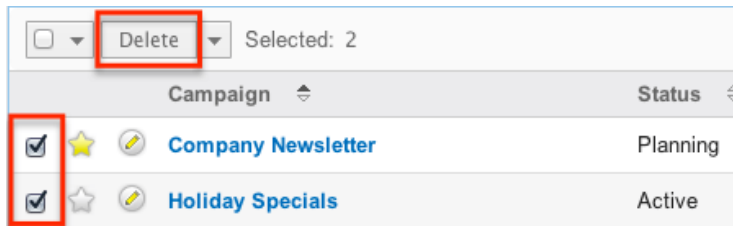
### Mass Deleting Via List View

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

1. Navigate to the Campaigns list view by clicking the Campaigns module tab.
2. Use the Basic or Advanced Search to find the campaign records you wish to

delete.

3. Select the desired campaign records individually or using the checkbox dropdown's options.
4. Choose "Delete" from the Actions menu.

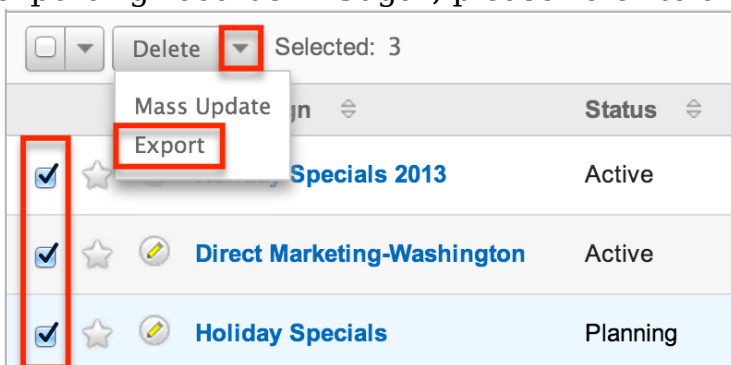


5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

## Exporting Campaigns

Sugar's Export option allows users to download all fields for the selected campaigns to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use campaign data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of campaign records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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



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

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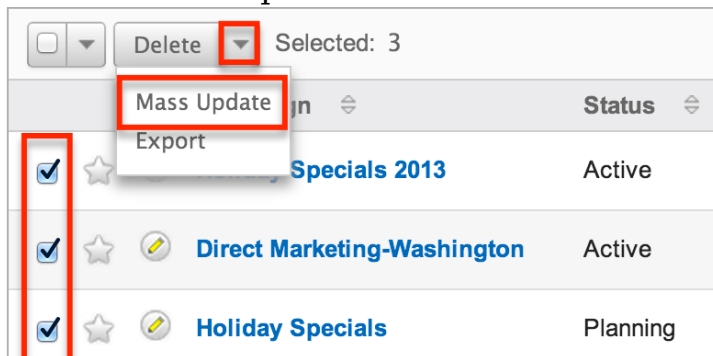
## Mass Updating Campaigns

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

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

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

1. Navigate to the Campaigns list view by clicking the Campaigns module tab.
2. Use the list view's Basic or Advanced Search to find campaigns you wish to modify.
3. Select the desired campaigns individually or using the checkbox dropdown's options.
4. Choose "Mass Update" from the Actions menu.



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

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

## Favoriting Campaigns

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

### Favoriting Via List View

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

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

Target List	Type
<input type="checkbox"/> <input checked="" type="checkbox"/> <span style="color: blue;">Current Clients-California</span>	Default
<input type="checkbox"/> <input type="checkbox"/> <span style="color: blue;">Current Clients-Indiana</span>	Default

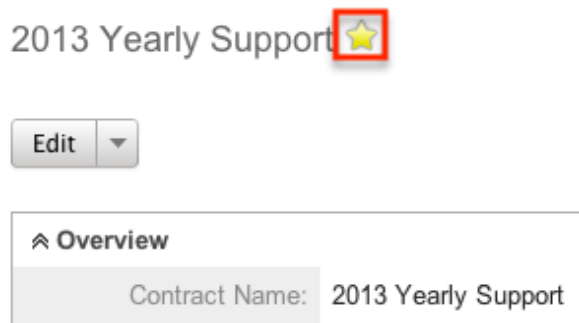


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## Favoriting Via Detail View

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

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



## Sharing Campaigns

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

Direct Marketing-Washington ☆



Users can simply click the link in the email to access the campaign 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 in the Administration guide.

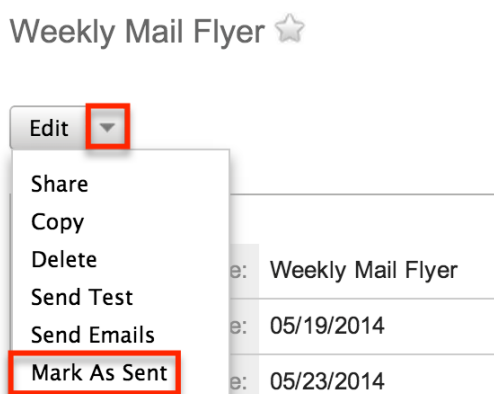
## Marking Campaigns As Sent

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When launching a non-email campaign such as a telesales or mail campaign, Sugar will need to be told that the campaign has been sent since the sending is performed outside of the application. Once you mark the campaign as "sent," the Campaigns subpanel on the detail view of each member of the campaign's target populates with a row indicating an activity of "Message Sent" to indicate that the campaign material was sent to that individual. The Campaign's status page will then display these recipients in the Message Sent/Attempted subpanel. For more information on the Campaigns status page, please refer to the Viewing Campaign Status section of this documentation.

Use the following steps to mark a campaign as sent via the Campaigns detail view :

1. Navigate to a campaign record's detail view.
2. Select "Mark As Sent" from the Actions menu.

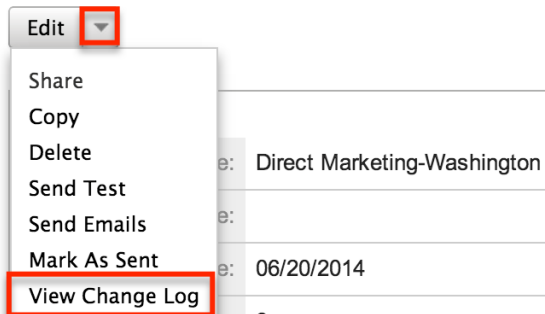


## Viewing Campaign Change Logs

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

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Direct Marketing-Washington ☆



## Using the Campaign Wizard

You can use the Campaign Wizard to guide you through the process of creating a campaign, however, it is recommended to create and modify campaigns using the classic interface instead. For instructions on creating and editing campaign records using the classic interface, please refer to the [Creating Campaigns](#) and [Editing Campaigns](#) sections of this documentation.

Last Modified: 2018-05-10 18:48:04

## Web-To-Lead Forms

### Overview

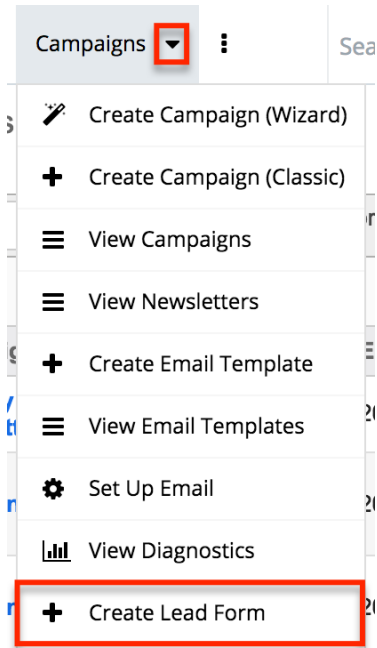
Sugar provides a simple way to allow visitors to your website or other online locations to become leads in your Sugar instance. You can generate a web-to-lead form in Sugar and place the form on an external website. When a visitor to your site completes and submits the form, their information is entered into Sugar as a new lead record. You can use this lead information to generate more opportunities for your organization.

### Creating Web-To-Lead Forms

The Sugar Campaigns module contains a lead form wizard to assist in generating a custom web-to-lead form. Use the following steps to create a web-to-lead form via the Campaigns module:

1. Click the triangle in the Campaigns module tab and select "Create Lead

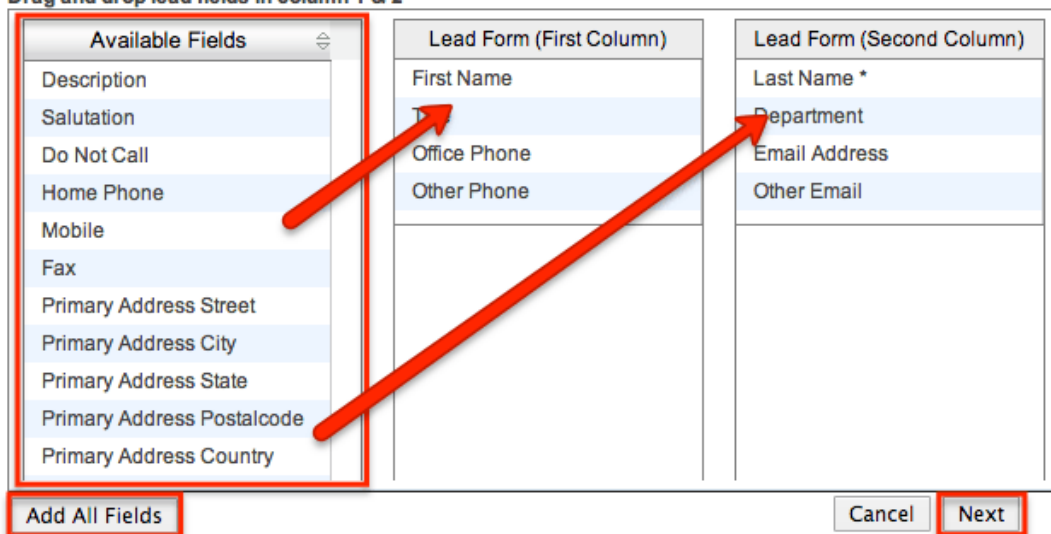
Form".



2. Click and drag the desired fields from the Available Fields list to the Lead Form (First Column) or Lead Form (Second Column) lists.  
Note: You can also choose to add all fields to either column by clicking the Add All Fields button.
3. All required fields marked with an asterisk must be added to a column on the lead form prior to continuing.
4. Once the fields you desire have been moved to the appropriate columns, click the Next button to continue.

### Lead Form Wizard

Drag and drop lead fields in column 1 & 2



5. Enter appropriate values for the fields in the next page of the wizard:  
Form Header : This will be the title at the top of your form. A generic title has been populated; modify or remove this to suit your needs.

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Form Description : This will be a brief description of the form and will show below the form header, but before the form begins. A generic description has been populated; modify or remove this to suit your needs.

Submit Button Label : Enter in the label for the button that will be used to complete the form. Submit is the default; you may change this to say "Sign Up", "Save", "Complete", or any other label to suit your needs.

Post URL : This is the location the form will send the data entered and is defaulted to your instance of Sugar. Select "Edit Post URL" to edit this field.

Note : If you change this location to be anything other than your Sugar instance then a lead will not be generated when the form is completed.

Redirect URL : This is the location your visitors will be directed to after completing the form. You may enter the location of your corporate website, a custom "Thanks for signing up" page, or any URL to suit your needs.

Note : Leaving this field empty will display a message that says: "Thank You For Your Submission".

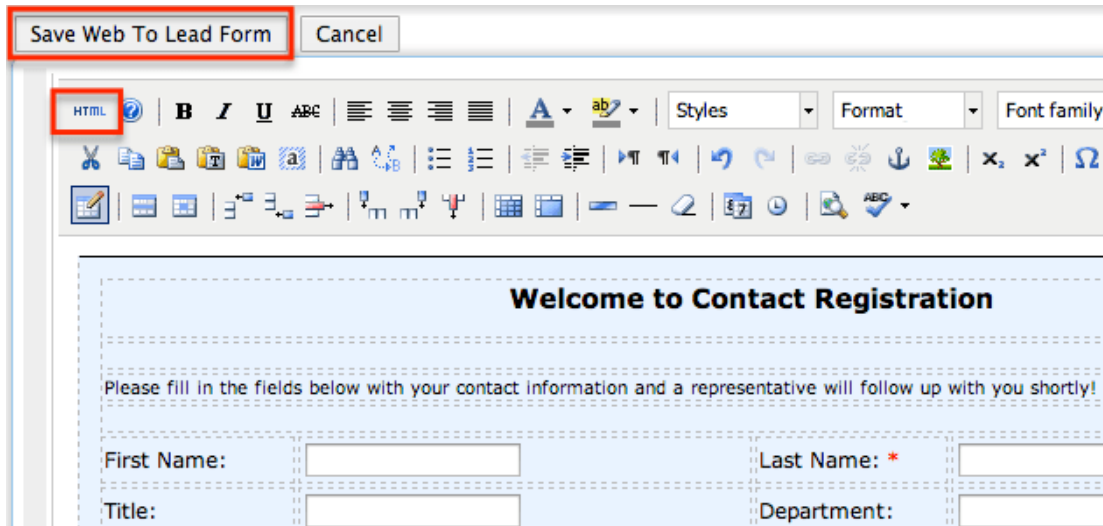
Related Campaign : Use the Select button to enter an existing campaign that is related to this lead form. Leads generated from this form will automatically be associated to this campaign.

Assigned to : Use the Select button to enter the user to be assigned to the new lead record when the form is submitted. By default, this field is populated with the current user who is generating the form.

Team : Enter the name of the team that is allowed access to the leads generated from this form. To change the primary team, either enter the team name here or select the team. By default the primary team selected will be Global. More than one team can be assigned simultaneously. For more information on teams, please refer to the Team Management documentation.

Form Footer : The form footer displays the text entered here below the form inputs, but before the submit button.

6. All required fields are marked with a red asterisk and must be completed prior to continuing.
7. Once the necessary information is entered, click "Generate Form".
8. Sugar then generates the HTML needed for your form and shows you a preview in a TinyMCE editor. At this point you can continue to add text and images and change the layout of your form.
9. For more advanced customization you can click on the HTML button in the top left to access and edit the generated HTML code.
10. Once any additional changes have been completed, click "Save Web To Lead Form".

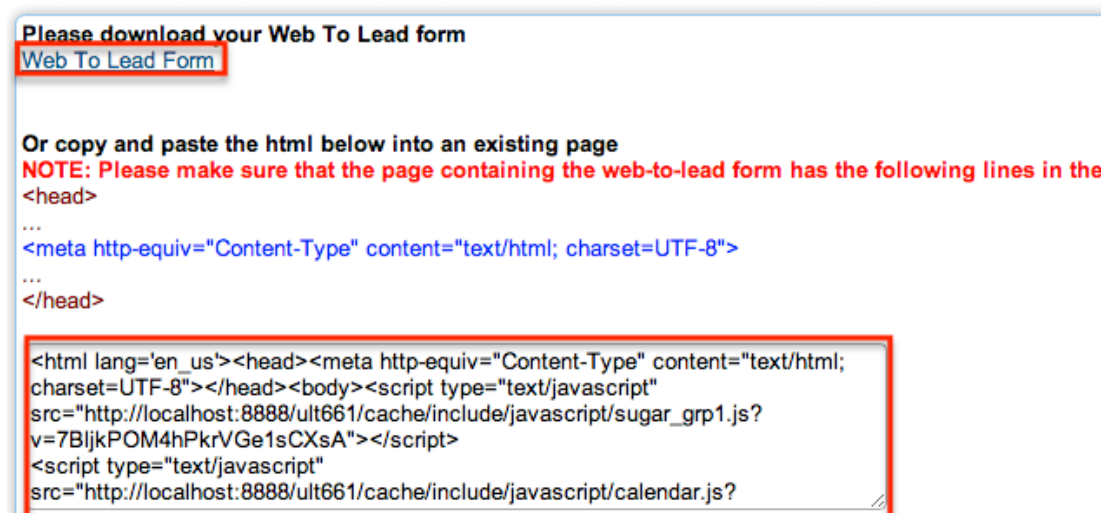


## Saving Web-To-Lead Forms

Since your web-to-lead form will be hosted outside of Sugar, you will need to save the generated HTML to a different hosting location. Your generated form will not be saved or accessible through Sugar after leaving this screen. If you need to add or remove fields to your form after generation, you will have to go through the steps to generate a new form.

Use the following steps to save your generated web-to-lead form:

1. You may download the generated HTML file by clicking on the Web to Lead Form link.
2. This will download the HTML file to your local computer. Simply transfer this file to the final hosting destination.
3. Alternatively, you may copy the HTML directly out of the text box on this screen and add it to a preexisting HTML file of your choosing.



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- Once the web-to-lead form is accessible to your potential customers, include a link to the form on your corporate website, social media websites, or add as a tracker URL in a campaign. For more information regarding adding tracker URLs to a campaign, please refer to the Campaigns documentation in the Application guide.

## Lead Generation

Once a web-to-lead form is submitted the data entered in the form becomes a lead record in your instance of Sugar tied to the campaign selected during form generation. Leads can be converted to contacts, accounts, and opportunities. For more information on the Leads module, please refer to the Leads documentation in the Application guide.

The campaign selected during form generation is linked to the created lead via the Campaign field under the More Information panel:

More Information

Status: Converted

Status Description:

Opportunity Amount:

Campaign: [WebtoLead](#)

As well as a subpanel called Campaigns:

Campaigns

Campaign	Activity Type	Activity Date	Related
<a href="#">WebtoLead</a>	Leads Created		<a href="#">Robert Smith</a>

Leads created from the web-to-lead form can be tracked in the Campaigns status page via the Status Chart:



And the subpanel titled Leads Created:

Leads Created

Add To Target List

Recipient Name	Recipient Email	Marketing Id	Activity Type	Activity Date	Rel
Chris Cornell			Leads Created		<a href="#">Chr</a>

If the lead that was captured in the web-to-lead form is converted to a contact, this will be shown in the Campaigns status page as well:

Contacts Created: 1

Contacts Created

Add To Target List

Recipient Name	Recipient Email	Marketing Id	Activity Type	Activity Date	Rel
Robert Smith			Contacts Created	02/14/2013 11:14am	Rot

For more information regarding the Campaigns status page, please refer to the Viewing Campaign Status section in the Campaigns documentation in the Application guide.

Last Modified: 2018-01-04 15:59:59

## 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.

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.

### Case Fields

The Cases module contains a number of stock fields which come out-of-the-box with Sugar. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.



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
Assigned To	The Sugar user assigned to the case  Note: Case owners receive an email whenever a case is assigned to them if the administrator has enabled email notification
Case Number	An automatically incremented number to identify every case, which cannot be edited through Sugar
Date Created	The date the case was created
Date Modified	The date the case was last modified
Description	Explanation of the cause and details of the case when submitted
Priority	Specify the urgency of the problem from this dropdown list
Resolution	Results of the investigation into the problem.
Show In Portal	Check this checkbox if the customer should be able to view this via the Portal
Status	Specifies the status of the case as the support representative moves the case along the process from submission to resolution
Subject	Brief statement of the problem
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
Type	Type of categorization that this case

	falls into
Work Log	Free form 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	The List View section walks through the many elements of the Cases List View

<ul style="list-style-type: none"> <li>Create Button</li> <li>List View Search</li> <li>Checkbox Selection</li> <li>Mass Actions Menu</li> <li>Favorite Designation</li> <li>Column Reordering</li> <li>Column Resizing</li> <li>Column Sorting</li> <li>Column Selection</li> <li>Preview</li> <li>Record Actions Menu</li> <li>More Cases</li> <li>Activity Stream</li> <li>Dashboards</li> </ul>	<p>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</p>
<ul style="list-style-type: none"> <li>Cases Record View</li> <li>Favorite Designation</li> <li>Following Designation</li> <li>Next or Previous Record</li> <li>Actions Menu</li> <li>Show More</li> <li>Subpanels</li> <li>Related Record Subpanels</li> <li>Filtering Subpanels</li> <li>Reordering Subpanels</li> <li>Activity Stream</li> <li>Dashboards</li> </ul>	<p>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.</p> <p>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.</p>
<ul style="list-style-type: none"> <li>Editing Cases</li> <li>Editing Inline via Record View</li> <li>Editing via Record View</li> <li>Editing Inline via Subpanels</li> <li>Editing Inline via List View</li> <li>Mass Editing via List View</li> <li>Editing Fields</li> </ul>	<p>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 subpanel on related module records, inline via the Cases list view, and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.</p>
<ul style="list-style-type: none"> <li>Deleting Cases</li> <li>Deleting via Record View</li> <li>Deleting via List View</li> </ul>	<p>The Deleting Records section describes the various methods of deleting unwanted cases, including via the Cases</p>

Mass Deleting via List View	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 Change Logs	The Viewing Record Change Logs section describes the View Change Log record view option which displays a history of changes to the case's audited fields.
Cases PDFs Downloading Cases PDFs Emailing Cases PDFs	The Record PDFs section provides instructions for these record view options which allow you to download or email .pdf files of case information as configured by an administrator via Admin > PDF Manager.
Favoriting Cases	The Favoriting Records section

<p>Favoriting via List View  Favoriting via Record View  Favoriting via Subpanel</p>	<p>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.</p>
<p>Following Cases  Following via List View  Following via Record View</p>	<p>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.</p>
<p>Sharing Cases</p>	<p>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.</p>

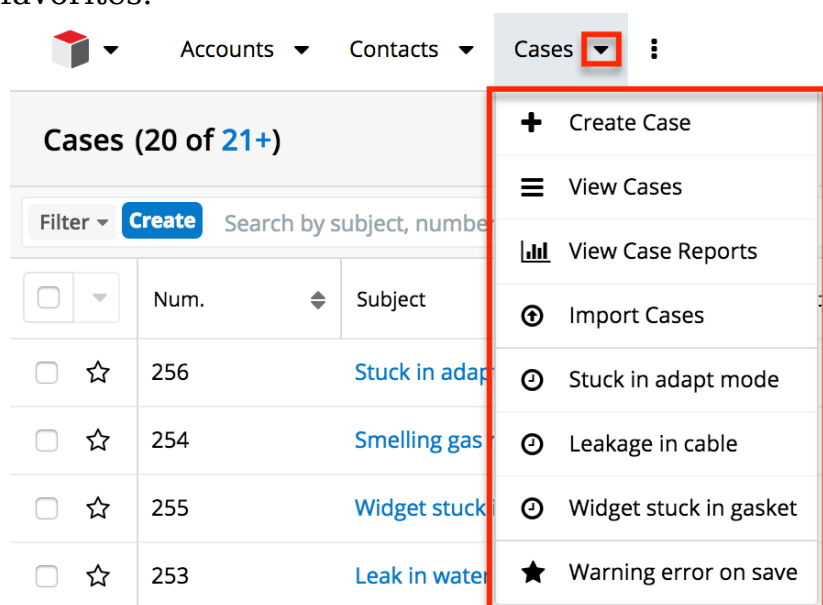
## Case Menu

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.

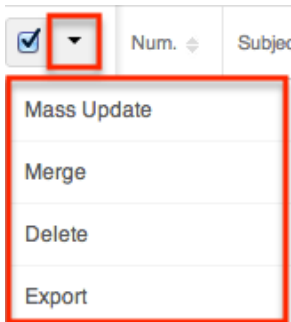
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## List View Menus

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 screenshot shows a table with columns: Num., Subject, Account Name, Priority, Status, Assign, and a menu icon. The first row is highlighted. A dropdown menu is open for the first row, showing options: Edit, Unfollow, and Delete. Red boxes highlight the menu icon and the dropdown menu.

Num.	Subject	Account Name	Priority	Status	Assign	...
251	New Test Ca...	Calm Sailing...	High	New	Admin	<ul style="list-style-type: none"> <li>Edit</li> <li>Unfollow</li> <li>Delete</li> </ul>
90	Need assista...	T-Squared T...	Medium	New		
149	Warning me...	XY&Z Fundi...	Medium	Reje		
89	Need assista...	T-Squared T...	High	Clos		

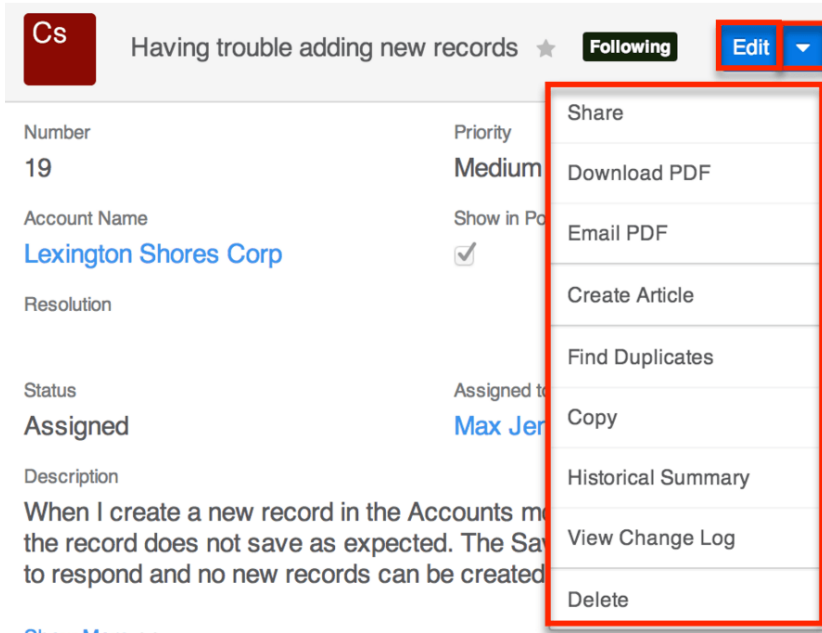
The list view's Record Actions menu allows you to perform the following operations:

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.  <ul style="list-style-type: none"> <li>This menu option is only visible if the administrator has created a PDF template for the Cases module via Admin &gt; PDF Manager.</li> <li>Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul>
Email PDF	Email the record's information as a PDF attachment.  <ul style="list-style-type: none"> <li>This menu option is only visible if</li> </ul>

	<p>the administrator has created a PDF template for the Cases module via Admin &gt; PDF Manager.</p> <ul style="list-style-type: none"> <li>Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul> <p>Note: To send emails through Sugar, users must first configure a default user email account via Emails &gt; Email Settings.</p>
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 Change Log	View a record of changes to this case.
Delete	Delete this case.

## 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.

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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 account 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

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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

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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.

Subject	Status	Date Created	Date Modified
[CASE:231] Warning...	Sent	2015-11-19 13:07	2015-11-19 13:07
[CASE:231] Warning...	Sent	2015-11-19 13:06	2015-11-19 13:06
[CASE:231] Warning...	Sent	2015-11-19 13:05	2015-11-19 13:05

More emails...

## 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

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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 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 for cases created in Sugar, the Show in Portal checkbox must be marked in the case's record view in order for it to appear in the portal. 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 note that the Display in Portal checkbox must be marked in the note in order for it to appear in the portal. These notes will only be visible to other portal users in your organization.

The screenshot displays a Sugar CRM case record view. At the top, there is a header bar with a blue 'Nt' icon, the text 'Additional information' with a star icon, a 'Following' button, and an 'Edit' dropdown menu. Below the header, the record is organized into two columns. The left column contains 'Contact' (Margarett Bristol), 'Description' (Hello Margarett, Please let me know if this issue is affecting all users in the system or only yourself. In addition, if you could please let me know if you would have some time to meet and discuss this further that would be great. Thank you, Max Jensen), and 'Attachment'. The right column contains 'Case' (Cannot access the Accounts module) and 'Teams' (Global (Primary)). Below the main content, there is an 'Assigned to' field showing 'Max Jensen'. At the bottom left, there is a 'Display in Portal?' checkbox which is checked and highlighted with a red box.

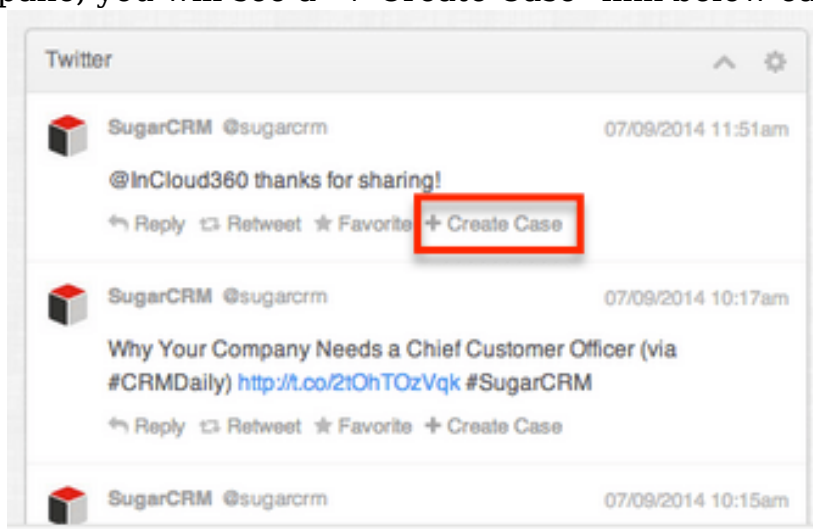
## Twitter Dashlet and Cases

Users can create cases directly from the Twitter dashlet via the Home page or from within any sidecar module's intelligence pane using Sugar's Tweet to Case

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feature. Follow the instructions below to get started with Tweet to Case:

1. Before enabling or using Tweet-to-Case, an administrator must first configure the Twitter connector for your instance.
2. Once the Twitter connector is configured, an administrator must then enable the Tweet to Case feature. Please refer to the Tweet to Case section of the System documentation for instructions on how to enable this feature.
3. Now you can add the Twitter dashlet to your Home page or to any Sidecar module's intelligence pane. For more information, please refer to the Dashboards and Dashlets documentation.
4. When the Tweet to Case feature is enabled and the Twitter dashlet is successfully added to your Home page or to a sidecar module's intelligence pane, you will see a "+ Create Case" link below each incoming tweet.



5. To create a case, simply click on this link and a new case drawer will open. Please note that the tweet ID will automatically be populated in the Subject field.

## 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.





Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Cases ▾

**Cs** Leak in water pipe ☆ Following

Number: 253      Priority: High

Account Name: Powder Suppliers      Show in Portal:

Show more...

Related ▾ All Filter All Records Search...

**Co** CONTACTS + ▾

**ci** CALLS (1) Link Existing Record

**Me** MEETINGS + ▾

The available contacts are automatically filtered to show those related to the case's account:

Search and Add Contacts (3) Cancel Add

Selected: (0) Reset

Filter ▾ Powder Suppliers Search by first name, last name...

Account Name ▾ is any of ▾ Powder Su... - +

<input type="checkbox"/>	Name	Title	Account Name	Email Address	⚙️
<input type="checkbox"/>	Trent Scroggins	VP Operations	Powder Suppliers	beans.im.im	👁️
<input type="checkbox"/>	Sho Arvizu	Mgr Operations	Powder Suppliers	the.vegan@e	👁️

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:

Selected: (0) Reset

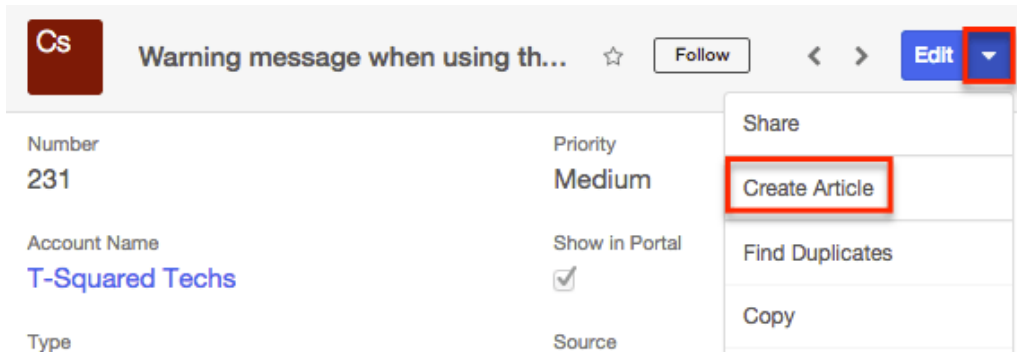
Filter ▾ Powder Suppliers Search by first name, last name...

Account Name ▾ is any of ▾ Powder Su... - +

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## 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 exists. 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.

Last Modified: 2018-01-03 19:59:01

## 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 case resolutions 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

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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 Articles 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. 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




Status	The current status of the article (e.g. Draft, Expired, In Review, Published) Note: The Status field must be set to "Published" for an article to be visible through the Sugar Portal.
Tags	User-created keywords that can be used to identify records in filters, dashlets, and reports Note: For more information on creating and using tags, please refer to the Tags documentation.
Teams	The Sugar team(s) assigned to the article
Title	The name of the article Note: This field will be visible to readers when the article is published.

## 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 Developer Tools documentation in the Administration guide.

Please note that the below values are only guidelines for defining your status and that you can skip one or more statuses based on your organization's needs.

Color	Status	Label	Description
White	Draft	<input type="text" value="Draft"/>	The article is currently undergoing changes
Yellow	In Review	<span style="background-color: yellow; padding: 2px;">In Review</span>	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		The article has been approved for publish
Green	Published		The article is live in the knowledge base
Gray	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 Articles

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 Knowledge Base documentation describe Knowledge Base-specific behaviors and functionality.

Content Link	Description
<a href="#">Creating Articles</a> <a href="#">Basic Article Creation</a> <a href="#">Creating via Subpanels</a> <a href="#">Creating via Duplication</a>	The Creating Records section covers the various methods of creating new articles including via the Create button in the Knowledge Base module, via the Knowledge Base subpanel on related module records, and duplication of an existing article.
<a href="#">Viewing Articles</a> <a href="#">Viewing via List View</a> <a href="#">Viewing via Record View</a> <a href="#">Viewing via Recently Viewed</a> <a href="#">Viewing via Dashlets</a> <a href="#">Viewing via Activity Streams</a> <a href="#">Viewing via Preview</a>	The Viewing Records section describes the various methods of viewing articles including via the Knowledge Base list view and record view, the Recently Viewed menu in the Knowledge Base module tab, list view dashlets showing article information, activity stream

Viewing via Reports	entries concerning article updates or where a user mentions an article, previewing articles in the right hand side panel, and reports displaying article data.
Searching for Articles Global Search List View Search Creating a Filter Saving a Filter	The Searching Records section provides an introduction to the two searching methods for locating articles: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Knowledge Base module.
Knowledge Base List View Total Record Count Create Button Module Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing Column Sorting Column Selection Preview Record Actions Menu More Articles Activity Stream Dashboards	The List View section walks through the many elements of the Knowledge Base List View layout which contains a filterable list of all articles in Sugar. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Knowledge Base list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of this page.
Knowledge Base 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 Knowledge Base Record View layout which contains detailed information about a single article. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Knowledge Base record view are described in the Record View Actions Menu section of this page.
Editing Articles Editing Inline via Record View Editing via Record View Editing Inline via Subpanels	The Editing Records section describes the various methods of editing existing articles including inline via the article record view, in full edit mode on the

<p>Editing Inline via List View  Mass Editing via List View  Editing Fields</p>	<p>record view, inline via the Knowledge Base subpanel on related module records, inline via the Knowledge Base list view, and via the Mass Update option on the list view. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.</p>
<p>Deleting Articles  Deleting via Record View  Deleting via List View  Mass Deleting via List View</p>	<p>The Deleting Records section describes the various methods of deleting unwanted articles including via the articles record view, an individual record's Actions menu on the Knowledge Base list view, and the Mass Actions menu on the list view.</p>
<p>Viewing Article Change Logs</p>	<p>The Viewing Record Change Logs section describes the View Change Log record view option which displays a history of changes to the article's audited fields.</p>
<p>Article PDFs  Downloading Article PDFs  Emailing Article PDFs</p>	<p>The Article PDFs section provides instructions for these record view options which allow you to download or email .pdf files of article information as configured by an administrator via Admin &gt; PDF Manager.</p>
<p>Favoriting Articles  Favoriting via List View  Favoriting via Record View</p>	<p>The Favoriting Records section describes the various methods of marking articles as favorites including via the Knowledge Base list view or an article's record view. Favoriting an article allows you to easily access it from list views, dashlets, or the Knowledge Base module tab.</p>
<p>Following Articles  Following via List View  Following via Record View</p>	<p>The Following Records section describes the various methods of marking articles as "Following" including via the Knowledge Base list view and the article's record view. Following an article causes its activity stream updates to be included on your Home page and Knowledge Base list view activity streams so that you can easily keep up with changes and user posts on</p>



	the record.
Sharing Articles	The Sharing Records section provides instructions for this record view option which composes an email with a link to the article. If the recipient is logged into Sugar, clicking the link will bring them directly to the article's record view.
Using the TinyMCE Text Editor	The Using the TinyMCE Text Editor section describes how to use the built-in WYSIWYG to build and customize the contents of your knowledge base articles.

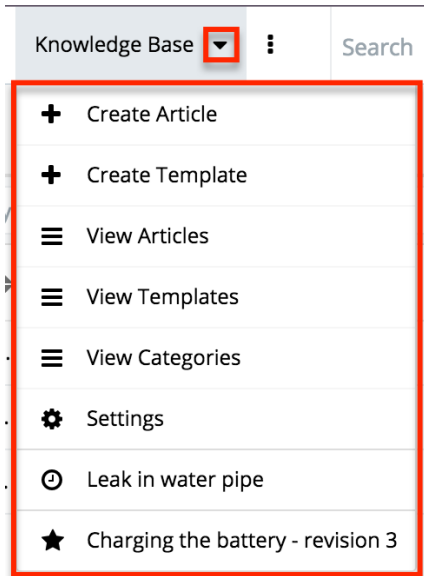
## Article Menus

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

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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.

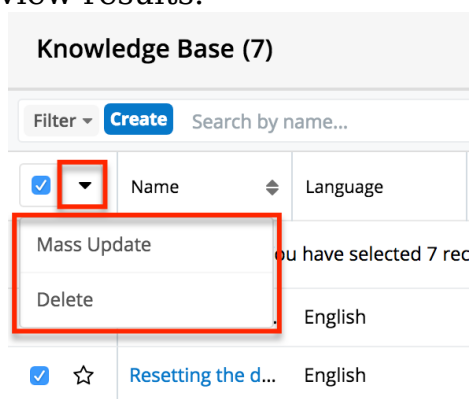
- The administrator may have disabled the Knowledge Base module for your entire Sugar instance. Reach out to your Sugar administrator to have the Knowledge Base module displayed. For more information on displaying and hiding modules throughout Sugar, please refer to the Developer Tools documentation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



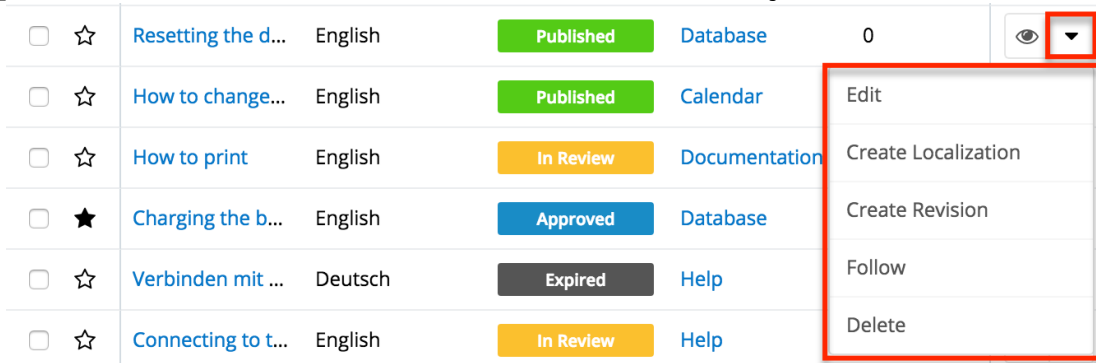
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more articles at a time
Delete	Delete this article

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## 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 screenshot shows a table of records with columns for checkboxes, star icons, article titles, languages, status buttons, categories, and counts. A dropdown menu is open for the first record, listing actions: Edit, Create Localization, Create Revision, Follow, and Delete. The dropdown menu is highlighted with a red border.

Checkbox	Star	Title	Language	Status	Category	Count	Actions
<input type="checkbox"/>	☆	Resetting the d...	English	Published	Database	0	▼
<input type="checkbox"/>	☆	How to change...	English	Published	Calendar		Edit
<input type="checkbox"/>	☆	How to print	English	In Review	Documentation		Create Localization
<input type="checkbox"/>	★	Charging the b...	English	Approved	Database		Create Revision
<input type="checkbox"/>	☆	Verbinden mit ...	Deutsch	Expired	Help		Follow
<input type="checkbox"/>	☆	Connecting to t...	English	In Review	Help		Delete

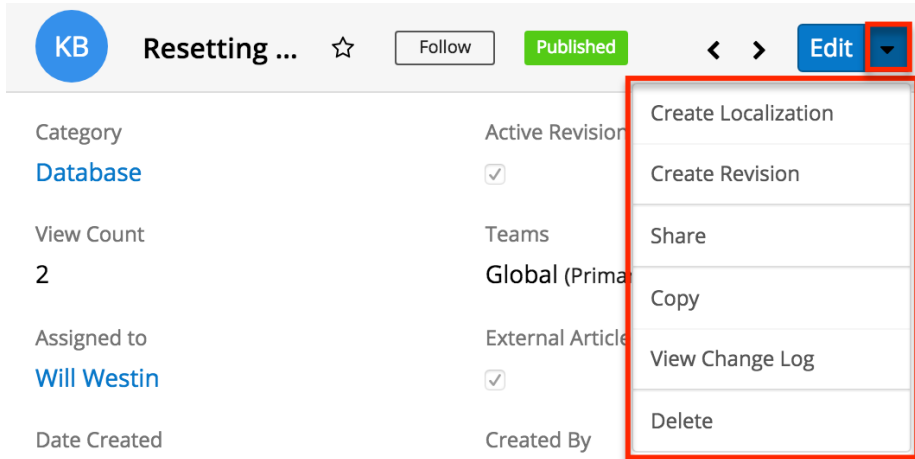
The list view's Record Actions menu allows you to perform the following operations:

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.  <ul style="list-style-type: none"> <li>• This menu option is only visible if the administrator has created a PDF template for the Knowledge Base module via Admin &gt; PDF Manager.</li> <li>• Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul>
Email PDF	Email the record's information as a PDF attachment.

	<ul style="list-style-type: none"> <li>• This menu option is only visible if the administrator has created a PDF template for the Knowledge Base module via Admin &gt; PDF Manager.</li> <li>• Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul> <p>Note: To send emails through Sugar, users must first configure a default user email account via Emails &gt; Email Settings.</p>
Copy	Duplicate this article.
View Change 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".





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**KB** **Resetting the device** ☆   < >  ▾

Category <a href="#">Database</a>	Active Revision <input checked="" type="checkbox"/>
View Count 2	Teams Global (Primary)
Assigned to <a href="#">Will Westin</a>	<input checked="" type="checkbox"/> External Article
Date Modified 2017-12-28 05:10pm	Approved By
Publish Date 2017-12-28	Related Case
<input checked="" type="checkbox"/> Expiration Date 2018-12-31	

[Show less](#)

## 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

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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.

The screenshot shows the top portion of a Knowledge Base article edit form. At the top left is a 'KB' logo. To its right is the text 'How to print' followed by a star icon and a 'Follow' button. Further right is the 'Status' field, which is a dropdown menu currently set to 'Published'. To the right of the status field are 'Cancel' and 'Save' buttons. Below this header, the 'Author' field is set to 'Will Westin'. The 'External Article' checkbox is checked. The 'Date Created' is '2015-07-13 15:50' and the 'Created By' is 'Administrator'.

## 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.

The screenshot shows the full article edit form. The 'Name' field contains 'How to print'. The 'Status' dropdown is set to 'Approved'. The 'Author' is 'Will Westin'. The 'External Article' checkbox is checked. The 'Date Created' is '2015-07-13 15:50' and the 'Created By' is 'Administrator'. The 'Date Modified' is '2015-07-16 14:27'. The 'Approved By' field is a dropdown menu with 'Select User...' selected. The 'Publish Date' field is set to '2015-07-22' and is highlighted with a red box. The 'Related Case' field is a dropdown menu with 'Select Case...' selected. The 'Expiration Date' is '2015-12-31'.

## 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

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Base record view and you are viewing a published article, it will automatically open to display the current article. This is a convenient way to confirm the placement of a published article in your category hierarchy.

Folder icons represent categories while document icons represent articles. Blue folders indicate that a category contains child categories or published articles; clicking the blue folder will expand it to display the category's contents. White folders, on the other hand, may not be expanded since they indicate that the category has no child categories or published articles. To collapse an expanded category, simply click the open folder icon. Clicking an article's name will open the article in record view.

The screenshot shows the Knowledge Base interface. The main area displays a table of articles with columns for Name, Language, Status, Category, and Frequency. The Status column shows 'Draft' and 'Published' buttons. The Category column shows 'Database', 'Calendar', and 'Video'. The Frequency column shows values like 0, 7, 5, and 7. The sidebar on the right shows the Knowledge Base Categories & Published Articles hierarchy, with 'Charging the battery - revision 2' highlighted under the 'Calls' category.

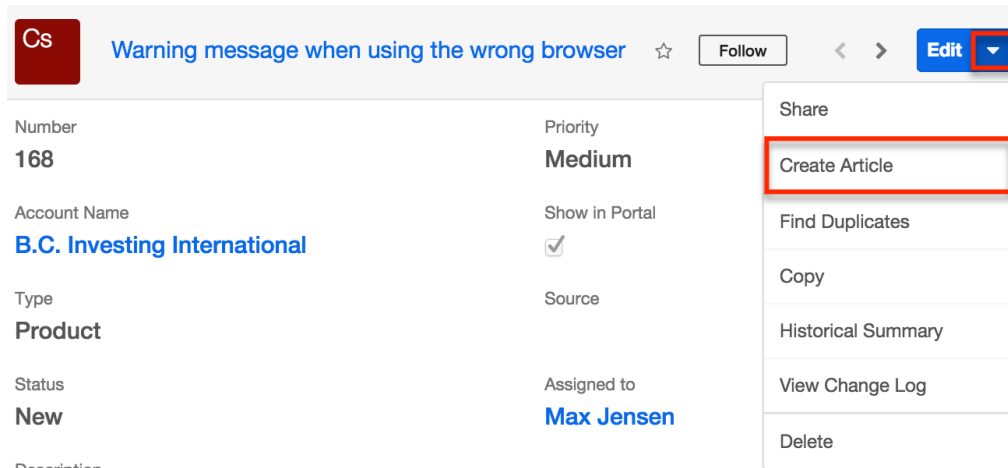
<input type="checkbox"/>	Name	Language	Status	Category	Freq	
<input type="checkbox"/>	Verbinden mit ...	Deutsch	<input type="button" value="Draft"/>	Database	0	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	Resetting the d...	English	<input type="button" value="Draft"/>	Calendar	0	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	How to print	English	<input type="button" value="Published"/>	Video	7	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	How to print	Greek	<input type="button" value="Published"/>	Video	5	<input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	How to print	Chinese	<input type="button" value="Published"/>	Video	7	<input type="checkbox"/> <input type="checkbox"/>

## 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. Navigate to a case's record view.
2. Select "Create Article" from the Actions menu.



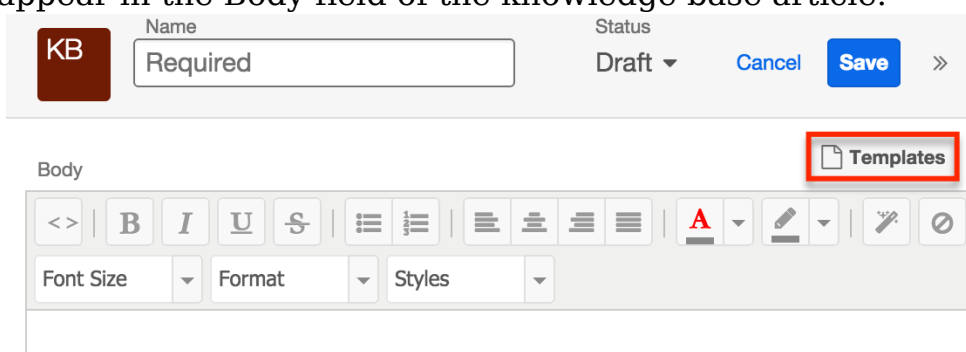
3. Update the necessary fields and then click "Save".

## 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

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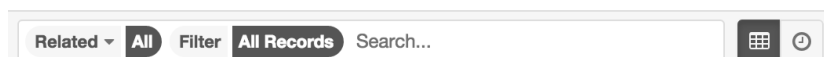
be applied. Select "Cancel" to disregard the template or "Confirm" to overwrite any existing content with the template's content.

## 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](#)



## 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.

**KB**
How to print ☆ Follow **Published**
Edit ▾ >>
My Dashboard ▾ Create ▾

<p>Language English</p> <p>Category <a href="#">Database</a></p> <p>View Count 8</p> <p>Assigned to <a href="#">Will Westin</a></p> <p>Date Created 2016-04-12 10:41</p> <p>Date Modified 2016-04-12 17:51</p> <p>Publish Date 2016-04-12</p> <p>Expiration Date 2017-04-07</p>	<p>Revision 1</p> <p>Active Revision <input checked="" type="checkbox"/></p> <p>Teams Global (Primary)</p> <p>External Article <input type="checkbox"/></p> <p>Created By <a href="#">Administrator</a></p> <p>Approved By</p> <p>Related Case</p>
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**Usefulness for Articles** ▲ ⚙

Useful	66.7	2.00
Not Useful	33.3	0.00

## 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.

**KB**
Resetting the device ☆ Follow **Published**
< > Edit ▾ >>
My Dashboard ▾ Create ▾

<p>Language English</p> <p>Category <a href="#">Help</a></p> <p>View Count 2</p> <p>Assigned to <a href="#">Will Westin</a></p>	<p>Revision 1</p> <p>Active Revision <input checked="" type="checkbox"/></p> <p>Teams Global (Primary)</p> <p>External Article <input type="checkbox"/></p>
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**Most Useful Published Knowledge Base Articles** ▲ ⚙

[How to print](#)  
Administrator 7 hours ago

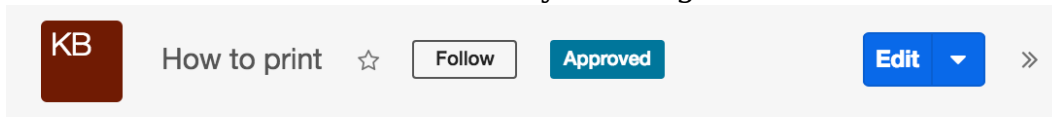
[Resetting the device](#)  
Administrator 7 hours ago

## 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

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the name of the attached file or by clicking "Download".



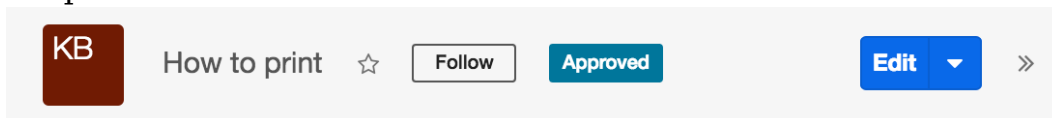
Body

In order to print, you first need to send your file to your computer. Access and print the file from your computer.

Attachments



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.



Body

In order to print, you first need to send your file to your computer. Access and print the file from your computer.

Attachments



## 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.

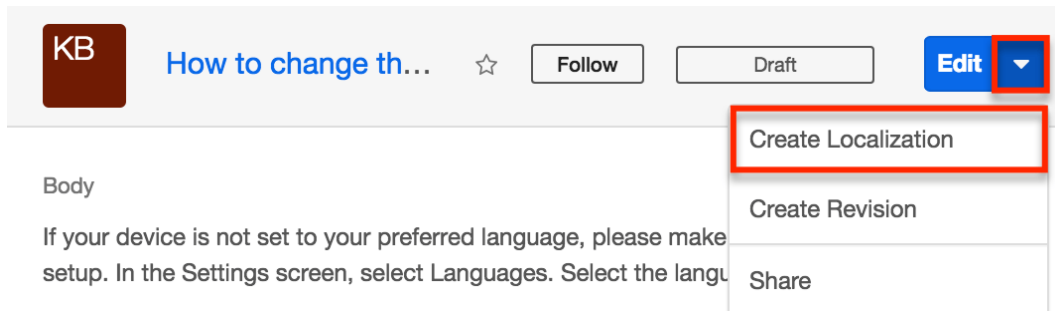


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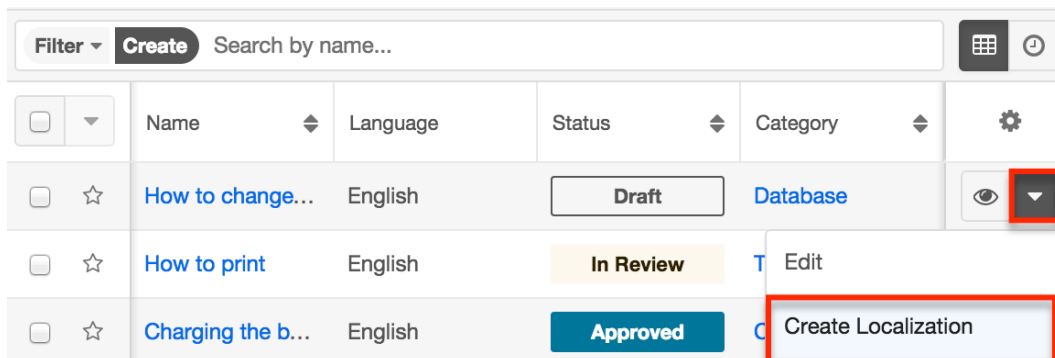
## Creating Localization Articles

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:

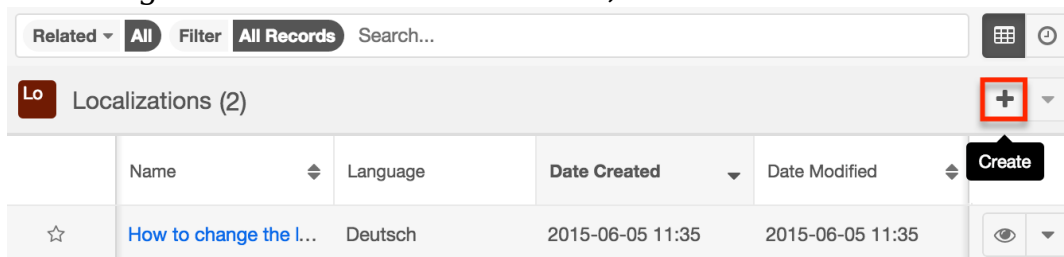
- To create a localization article from a Knowledge Base article's record view, click the Actions menu and select "Create Localization".



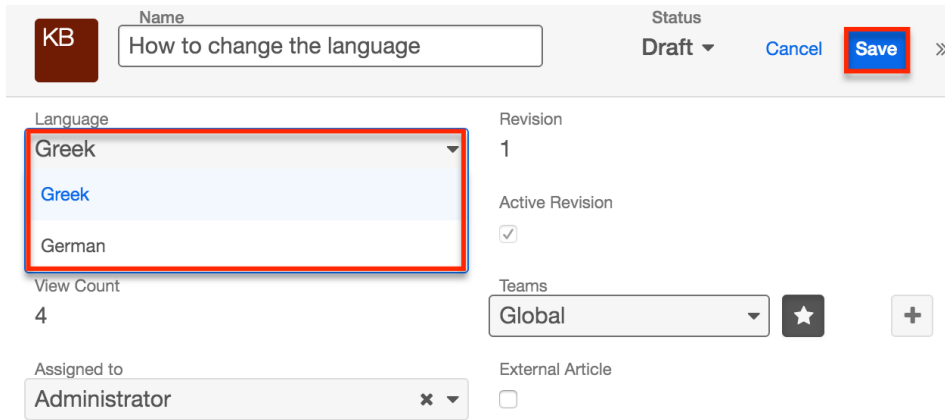
- To create a localization article from the Knowledge Base article list view, click the article row's Actions menu and select "Create Localization".



- 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

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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.

	Name	Language	Date Created	Date Modified	
☆	<a href="#">How to print</a>	Greek	2015-07-13 15:50	2015-07-17 1	👁️ ▼
☆	<a href="#">How to print</a>	Chinese	2015-07-13 15:50		Create Revision
☆	<a href="#">How to print</a>	English	2015-07-13 15:50		Edit

## 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.

The screenshot shows the record view for an article titled "How to change t...". The article is in English, has 1 revision, and is categorized as "Documentation". It has a view count of 9 and was created and modified on 2016-04-12 10:41. The assigned user is Will Westin, and it was created by Administrator. The dashlet on the right, titled "Published Articles in Other Languages", shows three translations of the article: "How to change the language" in German (de), Spanish (es), and Greek (gr). Each translation is created by Administrator and is 8 hours old. The German and Greek translations are highlighted with red boxes.

## Article Revisions

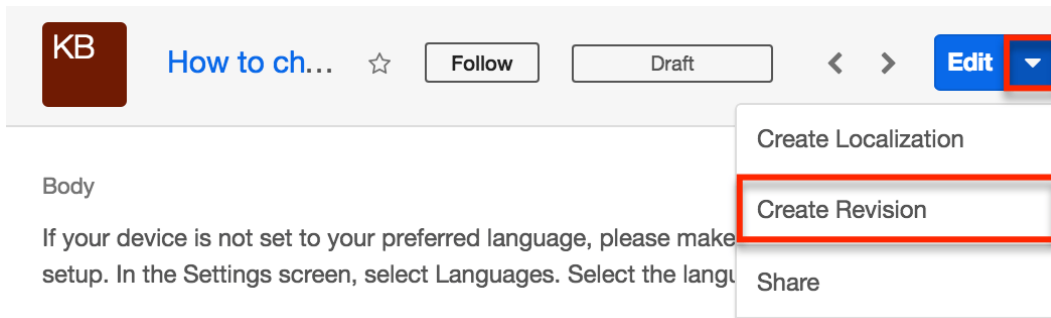
As you improve or update your knowledge base content, Sugar allows you to create revisions. Revisions are a set of articles that are versions of the same content. They allow you to keep a history of past versions as well as to make content changes without affecting the published version. One revision 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

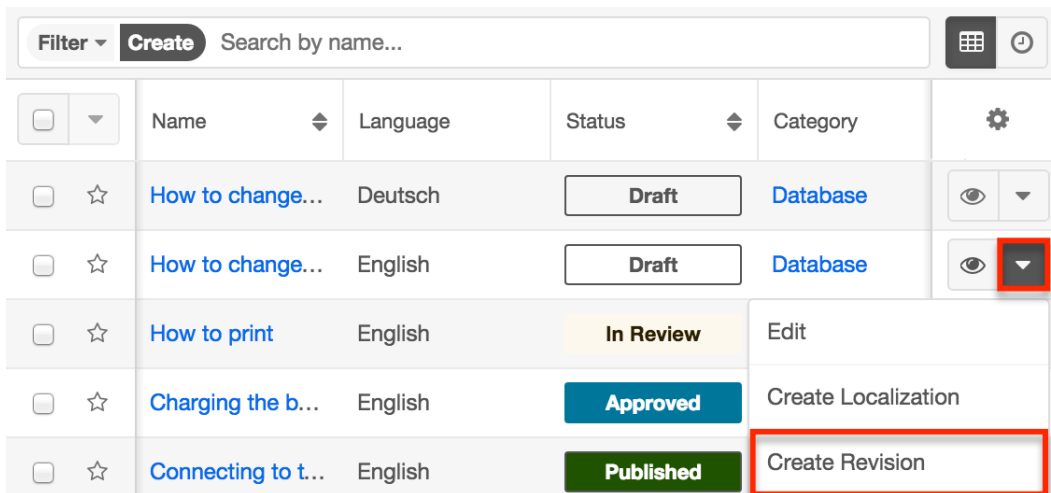
When a revision is created, it duplicates all fields from the original article except for the Status field, which will default to "Draft". Please note that the Date Created field of all revisions will match the date the original article was created. The Date Modified fields will, however, reflect the 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.

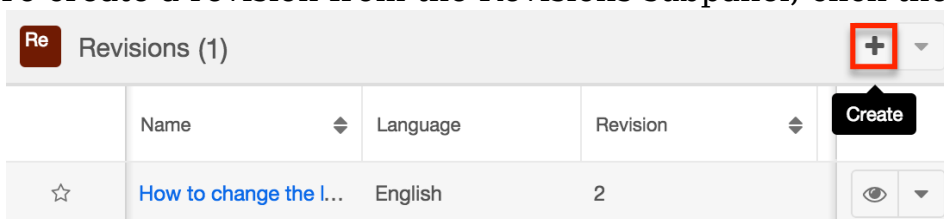
To create a revision from an article's record view, click the Actions menu and select "Create Revision".



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".

Lo Localizations (3)				+	▼
	Name	Language	Date Created		
☆	<a href="#">How to change the l...</a>	Deutsch	2015-07-13 15:50	👁	▼
☆	<a href="#">How to change the l...</a>	Chinese	2015-0	Create Revision	
☆	<a href="#">How to change the l...</a>	Greek	2015-0	Edit	

## 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.

**KB**
How to change the langu...
☆
Following
Draft
Edit ▼

<p>Language English</p> <p>Category <a href="#">Documentation</a></p> <p>View Count 12</p> <p>Assigned to <a href="#">Administrator</a></p> <p>Date Created 2016-04-12 10:41</p>	<p>Revision <b>2</b></p> <p>Active Revision <input type="checkbox"/></p> <p>Teams Global (Prim...</p> <p>External Article <input type="checkbox"/></p> <p>Created By <a href="#">Administrat</a></p>	<ul style="list-style-type: none"> <li>Create Localization</li> <li>Create Revision</li> <li>Share</li> <li>Download PDF</li> <li>Email PDF</li> <li>Copy</li> <li>View Change Log</li> <li style="border: 2px solid red; padding: 2px;">Delete</li> </ul>
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## 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.

Revisions (2) <span style="float: right;">+</span>					
	Name	Language	Revision	Active Revision	
<span style="border: 1px solid red; padding: 2px;">☆</span>	<span style="border: 1px solid red; padding: 2px;">How to print</span>	Deutsch	1	<input checked="" type="checkbox"/>	<span style="border: 1px solid red; padding: 2px;">👁️ ▼</span>
☆	How to print	Deutsch	1		<span style="border: 1px solid red; padding: 2px;">Edit</span>

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.

**Knowledge Base** Cancel >>

Filter Create Search by name...

Category ▼ is ▼ Tutorials - +

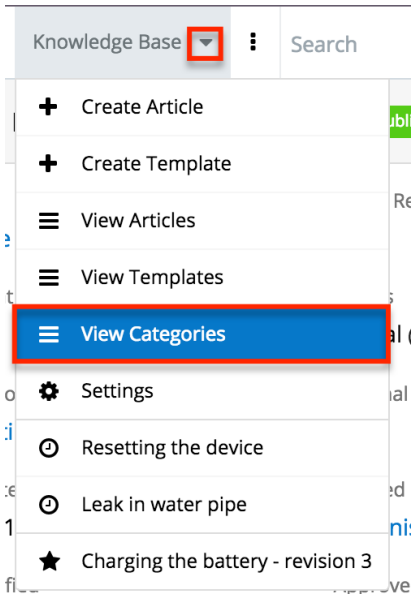
	Name	Language	Status	Category	
☆	<a href="#">Resetting the d...</a>	English	Draft	Tutorials	<span>👁️ ▼</span>
☆	<a href="#">How to change...</a>	English	Published	Tutorials	<span>👁️ ▼</span>

## Categories List View

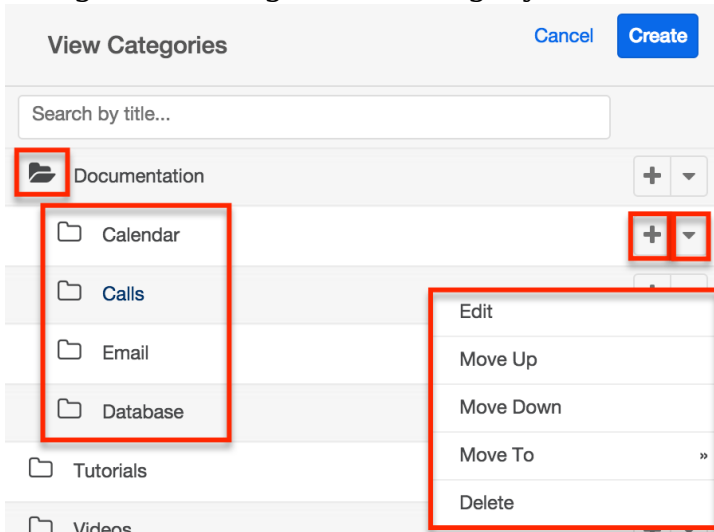
Click the triangle in the Knowledge Base module tab then select "View Categories" from the menu to open the Categories list view.







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

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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

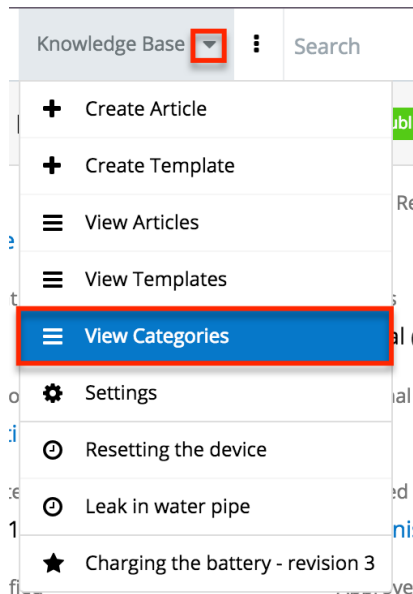
## Creating Categories

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.

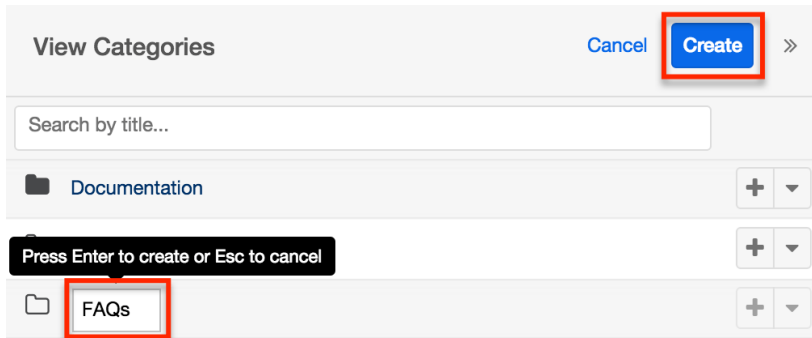
### Creating via Categories List View

Use the following steps to create a category from the Categories list view:

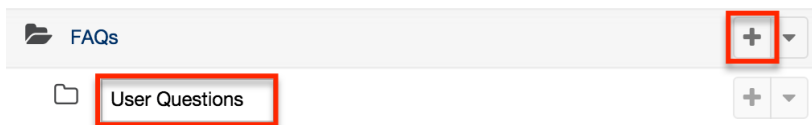
1. Select "View Categories" from the Knowledge Base module tab's Actions menu.



2. Click "Create" and enter the category name in the new row which appears. Press the Enter key to save.



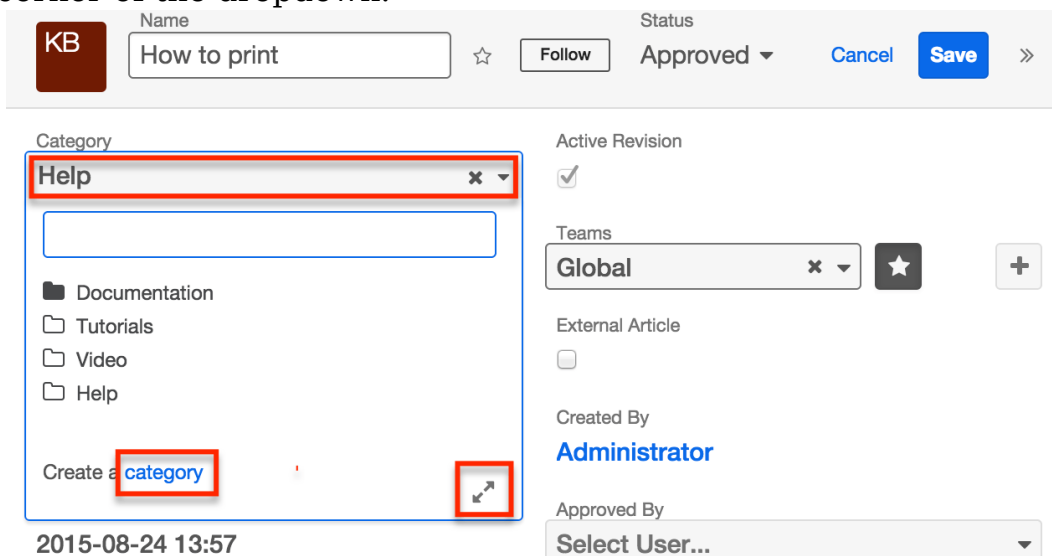
3. To create a subcategory, select the "+" to the far right of the category's row and enter the name of the new child row which appears. Press the Enter key to save.



## 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.

KB Name: How to print Status: Approved

Category: Help

- Documentation
- Tutorials
- Video
- Help
- FAQ

Active Revision:

Teams: Global

External Article:

Created By: Administrator

Approved By: Select User...

2015-08-24 13:57

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.

View Categories

Search by title...

- Documentation
- Calendar
- Calls
- Email
- Database
- Tutorials

Dropdown menu for Calendar:

- Edit
- Move Up
- Move Down
- Move To
- Delete

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.

KB Name: How to print Status: Approved

Category: Help

- Documentation
- Tutorials
- Video
- Help

Active Revision:

Teams: Global

External Article:

Created By: Administrator

Approved By: Select User...

2015-08-24 13:57

## Moving Categories

Users can change the order and hierarchy of categories via the Categories list view

### 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.

View Categories

Search by title...

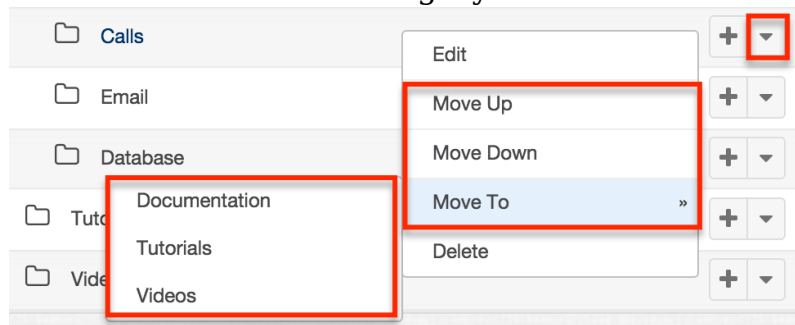
- Documentation
  - Calendar
  - Calls
  - Email
  - Tutorials
  - Database
  - Tutorials

### Moving via Record Actions Menu

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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

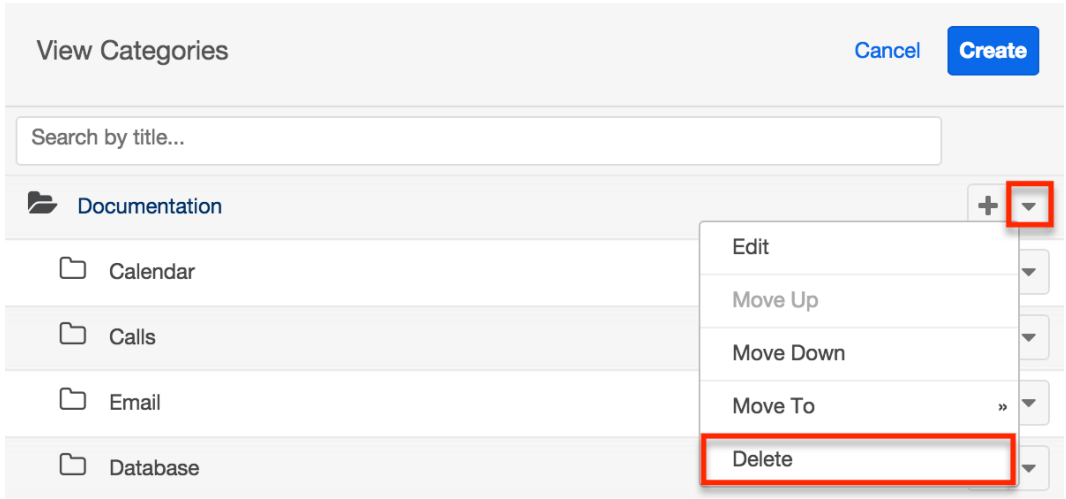


## Deleting Categories

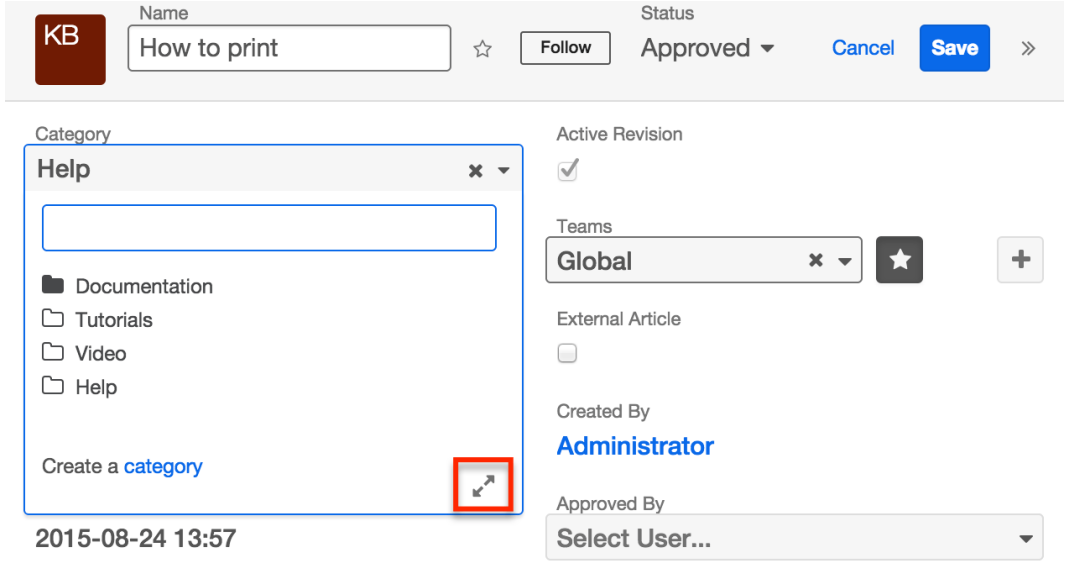
Categories can be deleted via the Categories list view and the Category field in an article's record view. Use caution when deleting a category because it will not only delete the current category, it will also delete all of its subcategories. When a category is deleted, any articles belonging to the 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.



Last Modified: 2018-01-03 20:20:51

# 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



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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.

## Bug Fields

The Bugs module contains a number of stock fields which come out-of-the-box with Sugar. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

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
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
Found in Release	The version of product where the bug was found
Number	An automatically incremented number to identify every bug, which cannot be edited through Sugar
Priority	Specify the urgency of the bug from this

	dropdown list
Resolution	Results of the investigation of the bug and how it can be fixed
Show in Portal	Check this checkbox if customers should be able to view this record via the Portal
Source	The method in which this bug was submitted, (e.g. internal, customer email, etc.)
Status	Specify the status of the bug as it moves along the process from submission to resolution
Subject	Brief statement of the problem
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
<a href="#">Creating Bugs</a> <a href="#">Basic Bug Creation</a> <a href="#">Creating via Quick Create</a> <a href="#">Creating via Subpanels</a> <a href="#">Creating via Duplication</a> <a href="#">Importing Bugs</a>	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.
Viewing Bugs 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 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.
Searching for Bugs 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 bugs: global search, which searches across all Sugar modules, and list view search, which searches and filters within the Bugs module.
Bugs 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 Bugs Activity Stream Dashboards	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	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

Reordering Subpanels Activity Stream Dashboards	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 Editing Fields	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. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.
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 Change Logs	The Viewing Record Change Logs section describes the View Change 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.

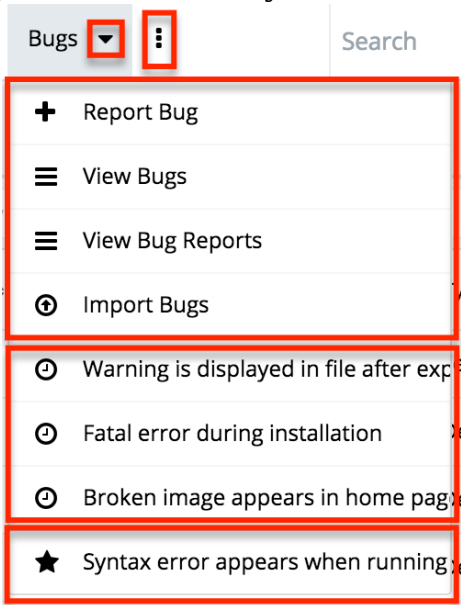
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## Bug Menus

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

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Import Bugs	Opens the import wizard to create or update bugs using external data
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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

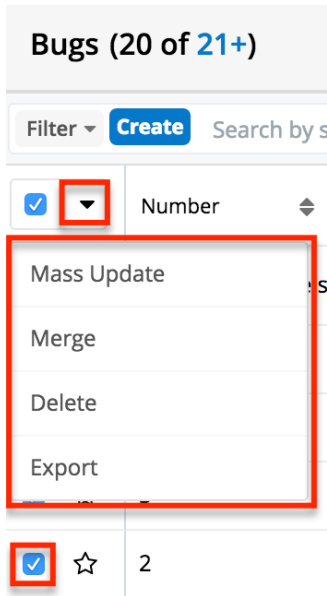
The Bugs list view displays all bug records and allows for searching and filtering to locate specific bugs. You can view the basic details of each record within the field columns of the list view or click a bug's name to open the record view. To access a module's list view, simply click the module's 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







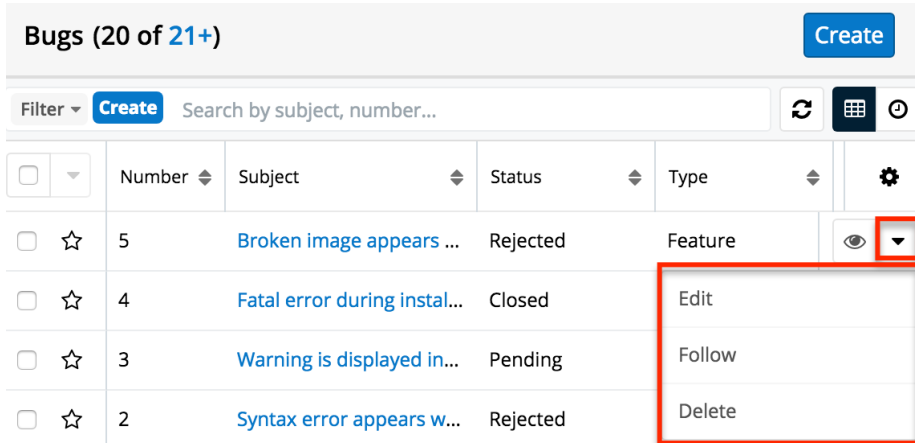
The Mass Actions menu allows you to perform the following operations:

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.





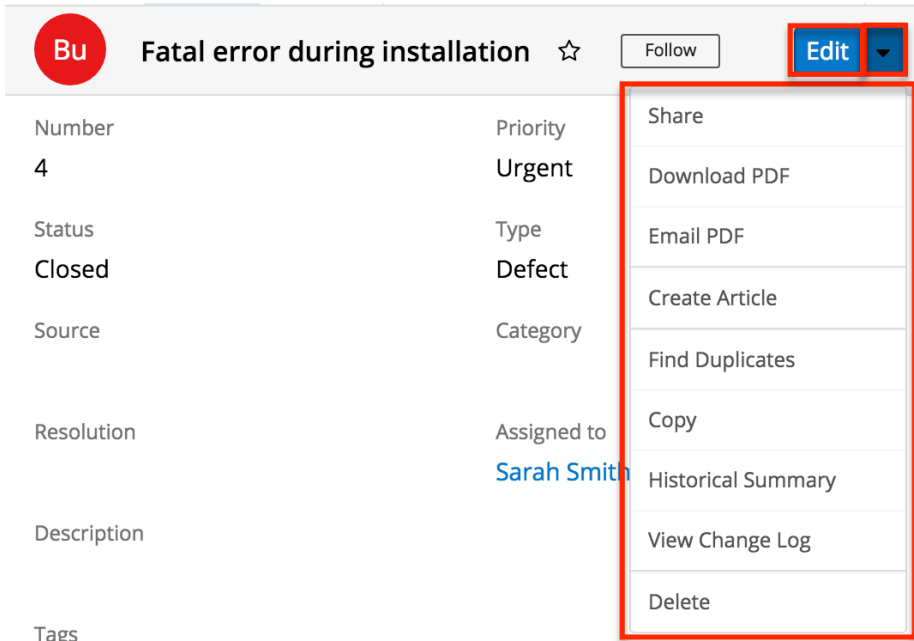
The list view's Record Actions menu allows you to perform the following operations:

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.  <ul style="list-style-type: none"> <li>• This menu option is only visible if the administrator has created a PDF template for the Bugs module via Admin &gt; PDF Manager.</li> <li>• Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul>
Email PDF	Email the record's information as a PDF attachment.  <ul style="list-style-type: none"> <li>• This menu option is only visible if</li> </ul>

	<p>the administrator has created a PDF template for the Bugs module via Admin &gt; PDF Manager.</p> <ul style="list-style-type: none"> <li>Clicking on this menu item will expand and contract the menu to reveal or hide the available PDF templates.</li> </ul> <p>Note: To send emails through Sugar, users must first configure a default user email account via Emails &gt; Email Settings.</p>
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 Change 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 for bugs created in Sugar, the Show in Portal checkbox must be marked in the bug's record view in order for it to appear in the portal. Customers can

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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 note that the Display in Portal checkbox must be marked in the note in order for it to appear in the portal. These notes will be visible to anyone with access to the portal.

The screenshot shows a bug record interface. At the top, there is a header with a profile icon 'Nt', the title 'Additional Information', a star icon, a 'Following' button, and an 'Edit' button with a dropdown arrow. Below the header, the record is divided into two columns. The left column contains: 'Contact' with the name 'Johanne Bramwell'; 'Description' with the text 'Hello Johanne, Please provide a screenshot of the error along with detailed steps to reproduce. Thank you, Max Jensen'; and 'Attachment'. The right column contains: 'Bug' with the title 'Fatal error during installation'; 'Teams' with 'Global (Primary)'; and 'Assigned to' with 'Max Jensen'. Below these columns, there are 'Tags' 'error' and 'service call', and 'Date Created' and 'Date Modified' both set to '2018-01-04 01:47pm by Administrator'. At the bottom left, a checkbox labeled 'Display in Portal?' is checked and highlighted with a red border.

## 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:

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- **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.





Related ▾ All Filter All Records Search...

Em **EMAILS (5 of 6+)** +

	From	Subject	Status	Date	
☆	Sally Bronsen	Demo	Archived	2017-07-14 05:45am	👁️ ▾
☆	Administrator	Discuss pricing	Draft	2017-12-29 02:05pm	👁️ ▾
☆	Sally Bronsen	Introduce all players	Archived	2017-10-12 08:00am	👁️ ▾
☆	Administrator	Demo	Draft	2017-12-29 02:05pm	👁️ ▾
☆	Will Westin	Demo	Archived	2017-03-07 01:00pm	👁️ ▾

[More emails...](#)

## 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.

**Bu** Fatal error during insta... ☆ Follow Edit ▾

Number	Priority	Share
4	Urgent	Download PDF
Status	Type	Email PDF
Closed	Defect	<b>Create Article</b>
Source	Category	

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.

# Projects

## Overview

Sugar's Projects module is used to track a variety of tasks in order for a project manager to properly organize and complete a given project. Projects are tracked using both a project grid and a Gantt chart. Resources (e.g. contacts and users) can be allocated to the tasks of each project to help ensure your deadlines are met.

Projects are also able to be associated to different accounts, contacts, opportunities, or other modules so that if a project is a direct result of one of these modules, such as the project being performed that was purchased through an opportunity, the relationship will show and alternate details be made available.

Note: This module is hidden by default. The administrator must enable it for your use.

## Project Fields

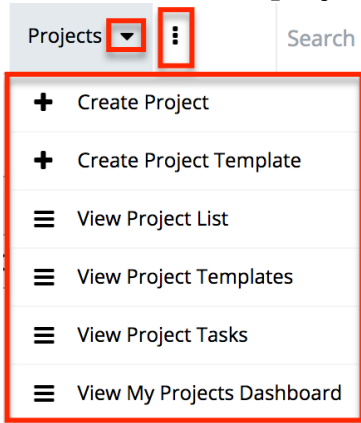
The Projects module contains the following fields which enable users to create and properly organize projects.

Field	Description
Assigned to	Enter the name of the user who has ownership of the project, which is assigned to you by default
Date Created	The date the project record was created
Date Modified	The date the project record was last modified
Description	Enter a brief description of the project
End Date	q1
Name	Enter a name for the project
Priority	Select the importance of the project from the dropdown list, such as Low, Medium, or High
Start Date	Click the Calendar icon and select the project start date

Status	Select a value from the dropdown list such as Draft, In Review, or Published to show the approval status of the project
Team	The Sugar team(s) assigned to the project

## Projects Module Tab

The Projects module tab is typically located on the navigation bar at the top of any Sugar screen. Click the tab to access the Projects list view. You may also click the triangle on the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of projects you last viewed in the module.



The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Project	Opens the edit view layout to create a new project
Create Project Template	Opens the edit view layout to create a new project template
View Project List	Opens the list view layout to search and display projects
View Project Templates	Opens the list view layout to display project templates
View Project Tasks	Opens the list view layout to search and display project tasks
View My Projects Dashboard	Opens the Projects Dashboard

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

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

## Creating Projects

There are three methods for creating projects in Sugar including via the Projects module, quick create, and Project Templates. The full edit view layout opens when creating the project directly from the Projects menu as well as via the Quick Create menu and includes all of the relevant fields for your organization. You can quick create a project while viewing an existing record (e.g. Accounts) of another module and Sugar will automatically create a relationship between both records. For example, if you are viewing an account record (e.g. ABC Company) and create a new project via the Projects subpanel, the project record's Accounts subpanel will automatically populate with "ABC Company", thus creating the relationship. Please note that administrators can configure both the Edit View and Quick Create layouts via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation in the Administration guide.

### Creating via Projects Module

One of the most common methods of project creation is via the Create Project option in the Projects module tab. This opens up the edit view layout, which allows you to enter all the relevant information for the project.

Use the following steps to create a project via the Projects module:

1. Click the triangle on the Projects module and select "Create Project".
2. Enter appropriate values for the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

---

## Create

^ Overview

Name: \*

Start Date: \*

## Creating via Quick Create

The Quick Create menu allows you to easily create new records from anywhere in Sugar. Simply click the quick create button on the upper right of all Sugar pages to access the menu. You can also easily create new records from any Projects subpanel on related module records.

Use the following steps to create a project via Quick Create:

1. Open the Quick Create menu on the upper right of any Sugar page and select "Create Project". You can also quick-create projects using the following methods:
  - o From Projects Subpanel (Sidecar modules):

Name	Assigned To	Start Date	End Date
Quarterly Sales Project	Max Jensen	10/01/2014	11/03/2014

- o From Projects Subpanel (Legacy modules):

^ Projects

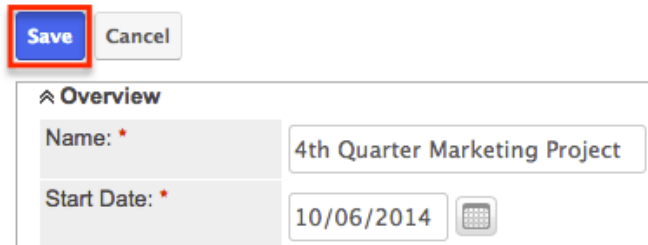
Name	Assigned To	Start Date
Quarterly Sales Project	Max Jensen	10/01/2014

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 project via the Projects subpanel in a Legacy module and additional fields are desired, click the Full Form button to use edit view instead.

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

[4th Quarter Marketing Project](#) » [Edit](#)



Save Cancel

Overview

Name: \* 4th Quarter Marketing Project

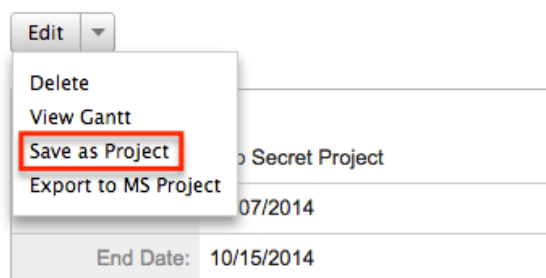
Start Date: \* 10/06/2014

## Creating via Project Template

Project Templates are used when a similar project is going to be configured time and time again. See Project Templates for more information. After you have a template already created, you can use the template to create additional projects, following these steps:

1. Click the triangle on the Projects module tab and select "View Project Templates".
2. While on the Project Template list view, click the name of your template to open the template's detail view.
3. Select "Save as Project" from the Actions menu.

[Top Secret Project](#) » [Project Template](#)



Edit

Delete

View Gantt

Save as Project

Export to MS Project

Name: Top Secret Project

Start Date: 07/2014

End Date: 10/15/2014

4. Change the name of your new project as need be and click "Save as New Project", where you will be brought to the detail view of your new project.

## Viewing Projects

There are various options available for viewing projects in Sugar including via Projects list view, Projects detail view, Projects Recently Viewed menu, the Project Dashboard, dashlets, and reports. Please note that you will only be able to see projects records as allowed by your team membership, user access type, and

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assigned roles. For more information on teams and roles, please refer to the Teams

## Viewing via List View

The Projects list view displays all project records meeting the current search criteria. To access the list view, simply click the Projects module tab. While list view shows key project fields, you can click the project's name to open the record in detail view. For more information on viewing project via list view, please refer to the Projects List View section.

## Viewing via Detail View

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

## Viewing via Recently Viewed

As you work, Sugar will keep track of which projects and project templates you have recently viewed. Click the triangle on the Projects module tab to see a list of your most recently viewed projects and click each name to open the project in detail view.

## Viewing via Project Dashboard

The Project Dashboard allows users to view upcoming and overdue project tasks, as well as any support cases related to projects the user is assigned to. It also allows an option for users to view any upcoming or overdue project tasks that are assigned to the user. The Project Dashboard can be reached by clicking the appropriate link in the Projects module tab.

The "My Projects Dashboard" panel shows four columns, showing projects that are assigned to you, any overdue project tasks where the Finish Date is in the past, any upcoming project tasks where the Start Date is within the next week, and any cases that are open related to the project.

The "My Project Tasks" panel shows two columns, showing any overdue project tasks assigned to you where the Start Date is in the past, any upcoming project



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tasks assigned to you where the Finish Date is within the next week.

All record references, for projects, project tasks, or cases, on either panel, are clickable and will bring you to either the detail view for the specific record or the Gantt chart of the parent project.

#### My Projects Dashboard

Project	Overdue Tasks	Upcoming Tasks (1 Week)	Open Cases
<a href="#">Top Secret Project</a> 01/25/2014	<a href="#">Receive funding</a> 02/28/2013	<a href="#">Prepare draft</a> 07/05/2013 <a href="#">Execute proposal</a> 10/29/2013	—
<a href="#">Create new plan for the annual audit</a> 12/31/2014	<a href="#">Perform field studies to collect data</a> 03/28/2013 <a href="#">Create draft of the plan</a> 04/01/2013	<a href="#">Update draft of the plan</a> 04/04/2013 <a href="#">Gather data from meetings</a> 04/04/2013	<a href="#">57</a> <a href="#">149</a> <a href="#">59</a>

#### My Project Tasks

Overdue Tasks	Upcoming Tasks (1 Week)
<a href="#">Review requirements</a> 03/14/2013	<a href="#">Identify resources</a> 04/03/2013 <a href="#">Secure workspace</a> 04/03/2013

## 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 of any module. You can view account information in List View dashlets specific to the Projects module (e.g. My Projects dashlet). Clicking a project's name from any dashlet will open the Project record view. For more information on using dashlets and viewing account records via dashlets, please refer to the Intelligence Pane documentation.

## Viewing via Reports

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

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## All Project Tasks

Title: All Project Tasks

Run Report 

Hide Details

**Name:** All Project Tasks **Type:** Rows and Columns Report  
**Modules:** Project Tasks **Teams:** Global  
**Display Columns:** Name, % Complete, Duration, Duration Unit, Start Date, Finish Date **Assigned to:** Administrator  
**Schedule:** None  
**Filters:** None

Name	% Complete	Duration	Duration Unit	Start Date	Finish Date
Gather data from meeting	50	3	Days	10/13/2014	10/15/2014
Update draft of plan	0	5	Days	10/13/2014	10/17/2014

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

## Searching Projects

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

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

Note: Projects is hidden from Global Search by default. The administrator must enable it for your use.

## Basic Search

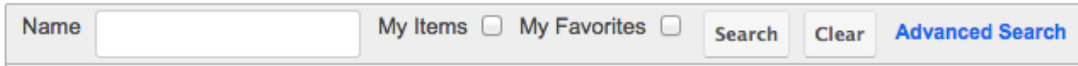
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Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

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 your favorite records.

#### Search Projects



The screenshot shows a search interface with a text input field labeled "Name". To the right of the input field are two checkboxes: "My Items" and "My Favorites". Further right are three buttons: "Search", "Clear", and "Advanced Search". The "Advanced Search" button is highlighted in blue.

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

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

## Advanced Search

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

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

- Search : Click the Search button or press your Return/Enter key to perform

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the search.

- **Clear** : Click the Clear button to clear all criteria from the searchable fields.
- **Layout Options** : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- **Saved Searches** : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.

The screenshot shows a search interface with several filter fields: 'Name' (text input), 'Start Date' (calendar icon), 'Status' (multiselect dropdown with options: Draft, In Review, Published), and 'Priority' (multiselect dropdown with options: High, Medium, Low). Below these is an expandable 'Layout Options' section. At the bottom, there are 'Search' and 'Clear' buttons, a 'Basic Search' link, a 'Saved Searches' dropdown menu (currently showing '-none-'), and a 'Save search as:' field with a 'Save' button.

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

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

## Global Search

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

To use global search, you need to first enter the keyword into the search box. With

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

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

## Projects List View

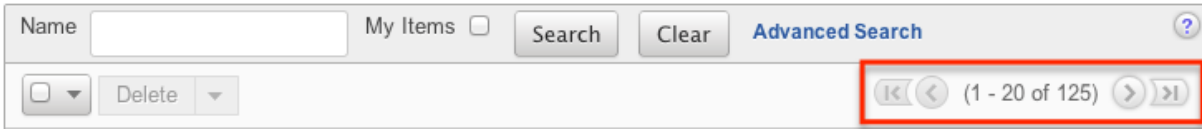
The Projects list view displays all projects meeting the current search criteria and to which your user has access. You can view the basic details of each project within the field columns. Please note that you will only be able to see projects as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

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

## Pagination

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

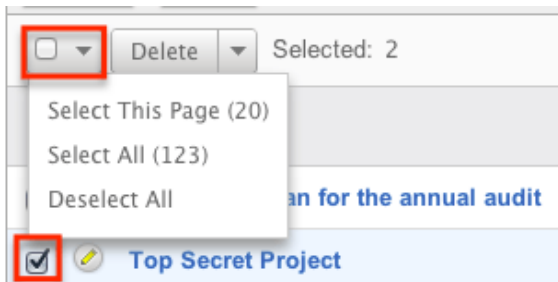
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.



## Checkbox Selection

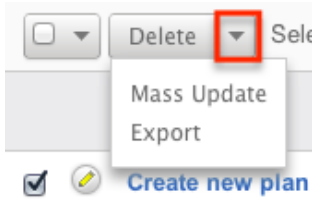
You can perform several actions on projects directly from the list view by first selecting the desired records. To select individual projects on the Projects list view, mark the checkbox on the left of each row. To select or deselect multiple projects on the list view, use the options in the checkbox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

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



## Actions Menu

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



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

Menu Item	Description
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Delete	Delete one or more projects at a time
Mass Update	Mass update one or more projects at a time
Export	Export one or more projects to a CSV file

## Favorite Designation

Users have the option to mark project 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 Projects module tab. In the Projects list view, the star on the left of each record's row is yellow once marked to indicate a favorite project. For more information on how to mark records as favorites, please refer to the Favoriting Projects section of this documentation.


## More Information

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

Name	Start Date	End Date	Status	Assigned To
<a href="#">Create new plan for the annual audit</a>	11/01/2010	12/31/2014	Draft	Administrator 

## 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.

Name	Start Date	End Date	Status
<input type="checkbox"/>  <a href="#">Create new plan for the annual audit</a>	11/01/2010	12/31/2014	Draft

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## Projects Detail View

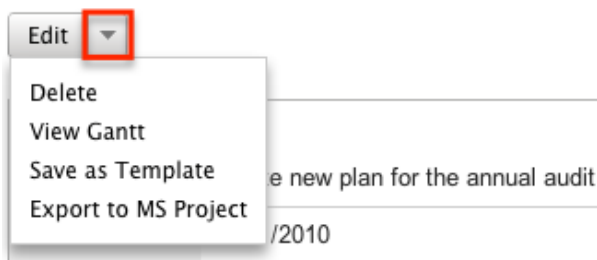
The Projects detail view displays thorough project information including all project fields, which are grouped by default into the Overview and Other panels. You can also view a project's related records (Activities, Opportunities, Cases, etc.), which appear in subpanels beneath the project fields. The detail view can be reached by clicking a project's link from anywhere in the application including from the Projects list view.

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

## Actions Menu

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

Create new plan for the annual audit



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

Menu Item	Description
Edit	Edit this project
Delete	Delete this project
View Gantt	View the project's Gantt chart
Save As Template	Save this project as a template for future use



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Export To MS Project	Export this project to an MPX file for use with Microsoft Project
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## Favorite Designation

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

## Next or Previous Record

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

Create new plan for the annual audit

Edit ▾

◀ (1 of 123) ▶

⌵ Overview

Name: Create new plan for the annual audit    Status: Draft

## Subpanels

Beneath a project's fields are subpanels containing all of the users and contacts that are working on the project, the project's tasks that need to be done, any holidays or days off of the project so they will not be included in the date and time calculations, and related records from various modules.

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

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## Resources Subpanel

The Resources subpanel is used to add specific Sugar users and contacts to the project. When these users and contacts are added to the project, they will be available to be added as resources on project tasks via the Gantt chart, meaning they are the responsible party for the task. For more information on project resources, please review the Project Resources section of this documentation.

The Resources subpanel allows the following operations to be performed:

- To view the details of a related user or contact, click the Users or Contacts icon in the subpanel to open it in detail view.
- To relate an existing user or contact to the project, choose the appropriate "Select" option from the subpanel's Action menu, then locate and select the desired record.
- To remove the resource from the project, click "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete any actual records.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.



Note: If you are not able to view this subpanel, the administrator may have disabled the Projects subpanel for your entire Sugar instance. Reach out to your Sugar administrator to have the subpanel displayed. For more information on displaying and hiding subpanels throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Project Tasks Subpanel

The Project Tasks subpanel lists all of the project's Project Tasks and basic details of each task. When a task is added to the project via the Gantt chart, the project task will appear on this subpanel. The Project Tasks subpanel allows the following operations to be performed:

- 
- To view the details of a project task, click the record's name in the subpanel to open it in detail view.
  - To add additional tasks to the project, click the "View Gantt" button from the subpanel's header and follow the information provided in Creating Project Tasks section of this documentation.
  - To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
  - To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

### Project Holidays Subpanel

The Project Holidays subpanel lists all of the resources' days that they will not be working. The subpanel includes columns showing the resource's name, the date of the holiday, and a description of the holiday. For more information on Project Holidays, please refer to the Project Holidays section of this documentation. The Project Holiday's subpanel allows the following operations to be performed:

- To add additional holidays to the project, click the "Create" button from the subpanel's header and fill in the necessary fields.
- To remove the holiday from the project, click "Unlink" from the dropdown on the far right of the record's row.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.

### Activities and History Subpanels

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

The screenshot displays two subpanels. The top subpanel, titled 'Activities', features a dropdown menu with the following options: 'Create Task', 'Schedule Meeting', 'Log Call', and 'Compose Email'. Below the menu is a table with columns: 'Status', 'Contact', 'Due Date', and 'Assigned User'. A single record is visible with 'Planned' status, contact 'Joseph Kelly', due date '05/04/2013 11:00am', and assigned to 'Administrator'. The bottom subpanel, titled 'History', has a dropdown menu with 'Create Note or Attachment'. Its table has columns: 'Subject', 'Status', 'Contact', 'Date Modified', 'Date Created', and 'Assigned User'. A record is shown with subject 'New product specs', status 'Note', date modified '04/04/2013 03:50pm', date created '04/04/2013 03:50pm', and assigned to 'Administrator'.

## Related Record Subpanels

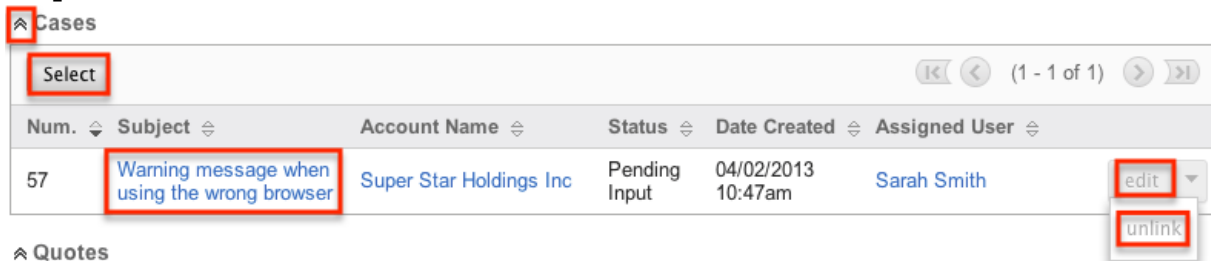
The most common type of subpanels displayed on a project's detail view contain the project's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. Out-of-the-box, the Projects module does not include any relationships to other modules that would cause a related record to be displayed in the field listing. However, for example, a project may be related to multiple cases. This means that the cases will be displayed in a subpanel beneath the fields listing.

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

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

- To view the details of a related record, click the record's name in the subpanel to open it in record view (for Sidecar modules) or detail view (for Legacy modules).
- To relate an existing record to the project, choose "Select" from the subpanel's Action menu, then locate and select the desired record.
- To relate a new record to the project, choose the Create option (e.g. Create Task) from the subpanel's Action menu, then complete the record view layout and click "Save".
- To edit the project's related record, choose "Edit" on the far right of the record's row.

- To delete the project's relationship to a record, choose "Unlink" from the dropdown on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To collapse or expand the subpanel, click the double arrow to the left of the subpanel's name.
- To move the subpanel to a new location on the detail view, drag and drop the subpanel's header.



## Editing Projects

Projects may be edited at any time to update or add information to the record. You can make changes to existing project records via the Projects edit view and quick create forms (for Legacy modules). Edit view is available within the Projects module and includes all of the Project fields you should need. To edit the Project Tasks related to this project, please refer to the Editing Project Tasks section of this documentation.

[Top Secret Project](#) » [Edit](#)

Quick create is available for editing projects from outside the Projects module and opens as a pop-up without navigating away from your current page. It generally contains fewer fields, but the Full Form button may be used to access the full edit view should you need to edit additional fields. Please note that the quick create form is only available when viewing Legacy module records (e.g. Quotes).

## Projects

Save Cancel Full Form

Name: *	Create new plan for the annual .	Status:	Draft
Start Date: *	12/01/2013	End Date: *	01/25/2014
Priority:	Medium		
Assigned to:	Administrator	Teams: *	
			Global
Description:	The annual audit is coming up next month.		

Save Cancel Full Form

Name	Assigned To	Start Date	End Date
Create new plan for the annual audit	Administrator	12/01/2013	01/25/2014

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

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

## Editing via Detail View

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

Create new plan for the annual audit


Edit

Overview	
Name:	Create new plan for the annual audit
Start Date:	12/01/2013

## Editing via List View

---

You can edit projects via the list view by clicking the Pencil icon to the left of each project's name. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.

Name	Start Date	End Date	Status
 Create new plan for the annual audit	12/01/2013	01/25/2014	Draft

## Deleting Projects

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

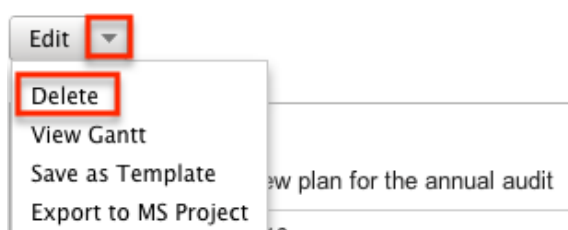
Please note that your ability to delete projects may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

### Deleting via Detail View

Use the following steps to delete a project via the detail view:

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

Create new plan for the annual audit



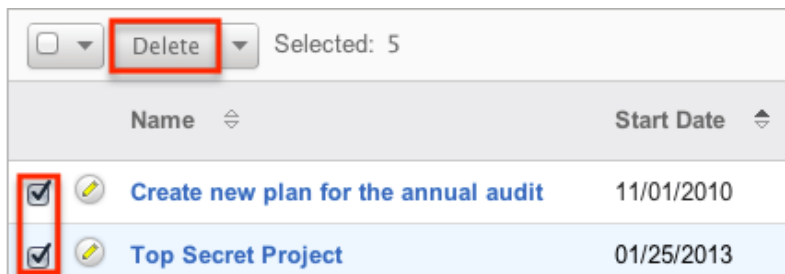
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

---

## Mass Deleting via List View

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

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



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

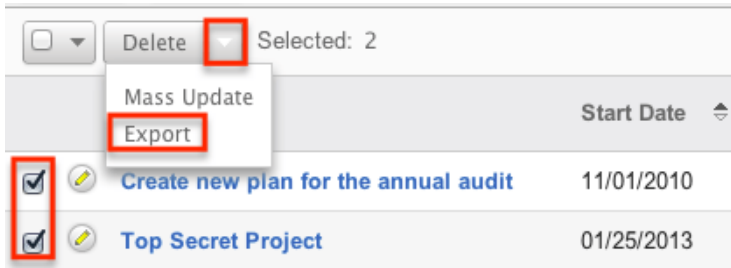
Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of project records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

## Exporting Projects

Sugar's Export option allows users to download all fields for the selected projects to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Project data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of project records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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





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

## Exporting to Microsoft Project

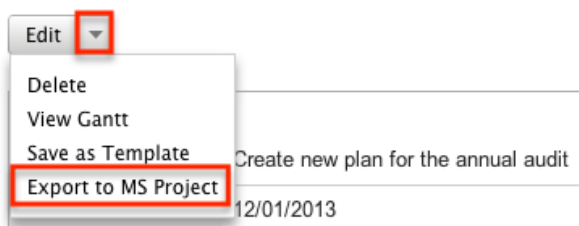
Sugar includes the functionality to export projects not just in CSV format, but also in .MPX format. MPX is the standard format used by Microsoft Project. Upon exporting this file, you will be able to open the file in Microsoft Project, which allows people who are not Sugar users to be able to view this project information.

Note: MPX file format is not supported by MS Project 2013.

The following steps cover exporting a project to Microsoft Project:

1. Navigate to a project's detail view.
2. Select "Export to MS Project" from the Actions menu.

Create new plan for the annual audit



3. Open the downloaded file in Microsoft Project.

## Mass Updating Projects

Mass Updating allows users to make the same change to multiple projects at once from the Projects list view. Users with administrator or developer access can control which fields are available to change during mass update via Admin > Studio. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. For more information

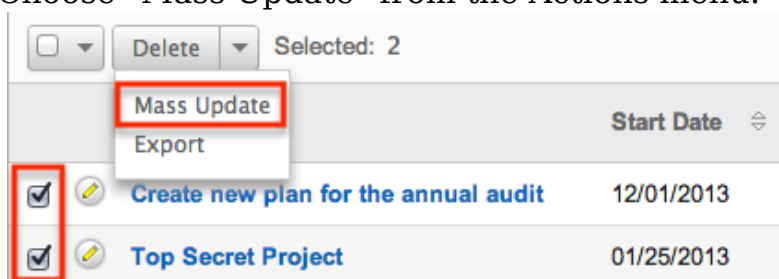
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on configuring mass update, please refer to the Studio documentation in the Administration guide. Due to the PHP memory limitations on the server, there may be occasions when the application times out while mass updating a large number of project records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

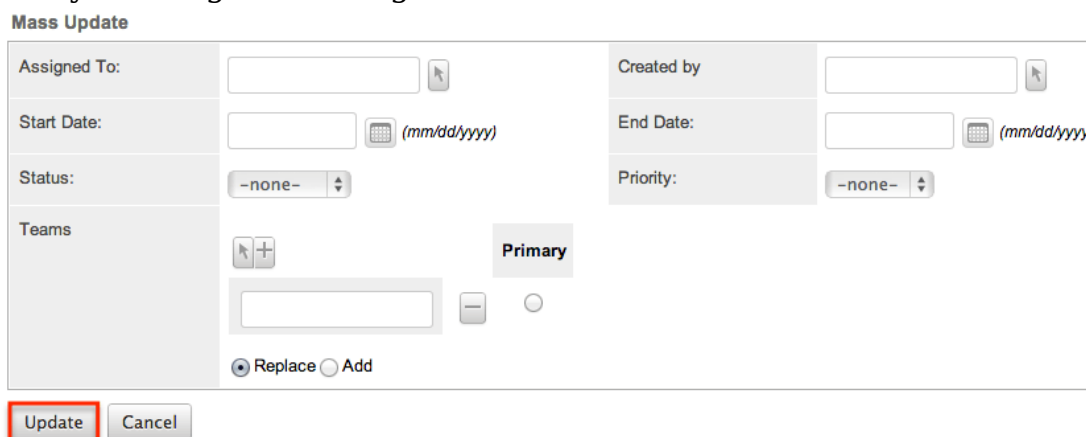
Please note that your ability to mass update projects may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

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

1. Navigate to the Projects list view by clicking the Projects module tab.
2. Use the list view's Basic or Advanced Search to find projects you wish to modify.
3. Select the desired project individually or using the Checkbox Dropdown's options.
4. Choose "Mass Update" from the Actions menu.



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

A screenshot of the 'Mass Update' panel in the application. The panel has a title 'Mass Update' and contains several input fields: 'Assigned To:', 'Created by:', 'Start Date:', 'End Date:', 'Status:', and 'Priority:'. The 'Status' and 'Priority' fields are dropdown menus with '-none-' selected. Below these fields is a 'Teams' section with a text input field, a '+', a '-', and a radio button labeled 'Primary'. At the bottom of the panel, there are two radio buttons: 'Replace' (selected) and 'Add'. Below the panel, there are two buttons: 'Update' and 'Cancel'. The 'Update' button is highlighted with a red box.

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

---

## Favoriting Projects

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

### Favoriting via List View

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

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

### Favoriting via Detail View

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

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

### Favoriting via Subpanel

Use the following steps to mark project records as favorites via the subpanel in related modules:

1. Navigate to a related module's record view (e.g. Contacts).
2. Click the star icon to the left of the desired record's row in the Projects subpanel.
3. To remove the project as a favorite, click the star again to revert it to gray.

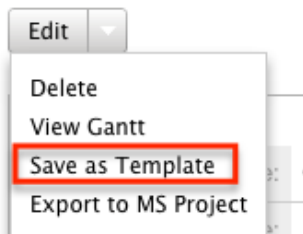
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## Project Templates

Project Templates are used when a similar project is used multiple times. Project Templates will save you from recreating the project each time. Instead, the template can be used to create a new project which will have the same information from the detail view and the same Project Tasks. Templates can be reused as often as need be. They can be created using two different ways:

- The module tab's Action Menu
- Replicating an existing project using the Detail View's Action Menu

Create new plan for



Choosing this option will bring you to a screen to define a new name for the template so that it can be made unique before saving the template and being mixed with others.

When creating a project from a Project Template, the Project Tasks carry over from the template to the new project. In addition, all of the fields within the module carry over.

To see a list of all project templates, navigate to the Project Templates list view. To access the list view, simply click the triangle over the Projects module tab and select "View Project Templates".

While list view shows key project template fields, you can click the project template's name to open the record in detail view. For more information on the Project Template's list view, please review the Projects List View section of this documentation.

To create a project from a template, please review the Creating via Project Template section of this documentation.

## Project Resources

Project Resources are a list of users and contacts that can be assigned Project

Tasks. On a project where you are the assigned user, you will see a subpanel on the Projects detail view called "Resources". The subpanel will provide options to Select User, Select Contact, or unlink an existing relationship. In addition any related user or contact resource will have a corresponding icon allowing you to view the user's detail view or contact's record view. For more information on viewing a contact's record view, please refer to the Viewing via Record View section of the User Interface documentation.



When a resource has been added to the project, the resource will show on the Gantt chart as an available option for Project Tasks to be assigned. For more information on the Gantt chart, please review the Project Tasks Gantt Chart section of this documentation.

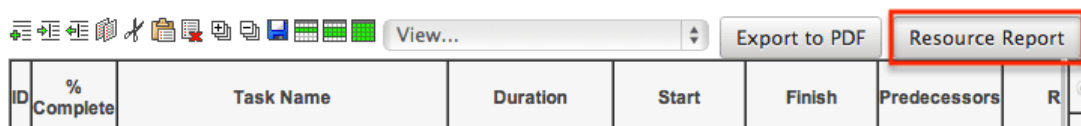
Note: If you are not able to view project resources, the administrator may have disabled the Projects subpanel for your entire Sugar instance. Reach out to your Sugar administrator to have the subpanel displayed. For more information on displaying and hiding subpanels throughout Sugar, please refer to the Developer Tools documentation in the Administration guide.

## Project Resource Reports

From the Gantt chart, a resource report can be created showing a specific user's or contact's assigned tasks across all projects and the user or contact's workload for a given timeframe.

[Audit Preparation](#)


### View Gantt





The report is filtered by each resource and filters for tasks starting or finishing after a date, and before another given date. This allows an overall view of the resource's time relative to all projects, not just one specific project.

---

## Resource Report

Resource:\*  

Tasks that Start or Finish After:\*  

And Before:\*  

This report shows the following information:

- **Daily Report** : This section shows a daily breakdown of all weekday dates for the report for the resource. The section also shows a "% Busy" section showing what percentage of an 8 hour day is being taken up for this resource by project tasks. If the resource has a Project Holiday scheduled, the % Busy will show as "Holiday".

### Daily Report

Date	% Busy
04/01/2013	0
04/02/2013	100
04/03/2013	100
04/04/2013	Holiday
04/05/2013	Holiday

- **Project Tasks** : This section shows a list of all project tasks associated with the resource in the given timeframe. This includes tasks across all projects, not just the project from which the report was generated. This shows details for each task so that you can see each task assigned to the user, as well as the project that the task is for.

### Project Tasks

ID	Project	Task Name	% Complete	Duration	Start	Finish
1	Create new plan for the annual audit	Communicate with internal stakeholders	100	3 Days	04/02/2013	04/04/2013

- **Holidays** : This section shows a list of all of the resource's project holidays for the given timeframe. This will show all holidays, regardless of which project they are associated.

### Holidays

Date	Project
04/04/2013	Audit Preparation
04/05/2013	Create new plan for the annual audit

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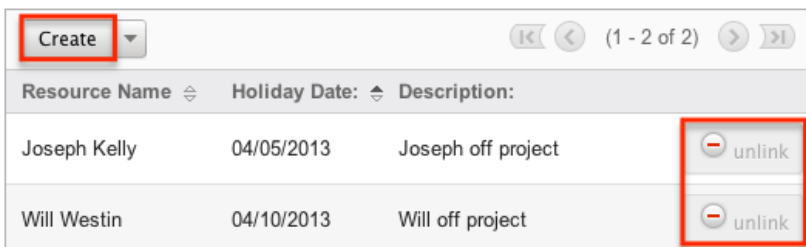
## Project Holidays

The Project Holidays subpanel allows you to list any days that a user or contact resource will not be working on a given project. This links with the project tasks to ensure that timing of tasks is not affected by a resource taking a holiday. The holidays are marked for specific days for specific project resources. Project Holidays contain three fields:

Field	Description
Description	A brief description or reason for the holiday.
Holiday Date	The holiday or vacation date for this resource on the project.
Resource Name	The user or contact taking the holiday, selected from a dependent dropdown list.

Holidays created from this subpanel are specific to the project. Holiday records can be deleted and removed from the project by clicking "Unlink" on the corresponding line on the subpanel.

### Project Holidays



## Project Tasks

Project Tasks are a list of each task that needs to be performed to complete the project. Project Tasks is a separate module than the Projects module, but it can only be accessed via Projects. Each task can be tracked and monitored via the Gantt chart. Each task can also be assigned a specific resource and is given a planned start and finish date allowing the timing to be tracked and planned.

## Project Task Fields

The Project Tasks module contains the following fields, which enable users to properly organize and track each task.

Field	Description
% Complete	A numerical value to indicate what percentage of the task has been completed.
Actual Duration	After the task is completed, enter a numerical value for the actual duration of the task.
Description	Found only in the edit and detail views, enter a brief description of the task and any necessary details.
Duration	<p>Only editable from the Gantt chart, enter a numerical value to indicate how long it would take to complete the task which can be specified in days or in hours.</p> <p>Note: Changes to this field will affect the Finish Date as well.</p>
Estimated Effort (hrs)	Found only in the edit and detail views, enter a numerical value for the estimated amount of work needed for this task.
Finish Date	<p>Only editable from the Gantt chart, this field will populate based on the Start Date and Duration. Clicking on this field on the Gantt chart will produce a calendar popup to easily select a date.</p> <p>Note: Changes to this field will affect the Duration as well, and will be affected by changes to the Start Date and/or Duration fields.</p>
Milestone	Mark tasks as milestones if they are an important and measureable landmark on the way to completing the project. Tasks can be marked with a checkbox on the edit view or by clicking the task ID to highlight the entire row and then right clicking in the Gantt chart. Milestone tasks will include an asterisk next to the task ID on the Gantt chart.
Order	The project task's detail view and edit view display an Order field. This field,



	<p>which was used in the application prior to version 5.0, has been replaced by the Task ID field. If you are not using an order number, you can safely remove this field from the Project Task layouts in Studio.</p>
Predecessors	<p>If the completion of this task depends on the completion of other tasks, enter the Task ID in this column. This field must be edited and viewed from the Gantt chart.</p> <p>Note: Multiple tasks can be predecessors and the IDs can be separated by commas.</p>
Priority	<p>Choose a value of Low, Medium, or High for the task which can be edited and viewed from the edit and detail views.</p>
Project	<p>The name of the parent project that can be viewed from both the edit and detail views. This value cannot be edited.</p>
Resource	<p>Select the individual who is assigned to the task from the Resources dropdown list.</p>
Start Date	<p>Only editable from the Gantt chart, this field will automatically populate with today's date. Clicking on this field on the Gantt chart will produce a calendar popup to easily select a date.</p>
Status	<p>Found only in the edit and detail view, choose a value representing the current stage of the task. This field also shows on the Project Tasks subpanel.</p>
Task ID	<p>When viewing the Gantt chart, the tasks are ordered by Task ID. Task IDs cannot be directly edited from the Gantt chart or the edit and detail views. To move a task to a different section of the list, and therefore change its Task ID, click on the existing ID to highlight the row, then right click to "Cut" and then "Paste" it in the new location.</p>
Task Name	<p>Enter the name for the project task</p>

	here.
Task Number	The project task's detail view and edit view display a Task Number field. This field, which was used in the application prior to 5.0, has been replaced by the Task ID field. If you are not using task number, you can safely remove this field from the Project Task layouts in Studio.
Teams	The Sugar team(s) assigned to the task. This is only viewable from the edit and detail view.
Utilization (%)	From the dropdown list, select the percentage of a day that the resource should dedicate their work hours towards the assigned task. This field is only found in the edit and detail views of the project task.  Note: The value of this field is not reflected in the Resource Report.

## Project Tasks Module Tab

The Project Tasks module tab is located on the navigation bar at the top of the Project Task detail view, Project Task edit view, or Project Task list view. Click the tab to access the Project Task list view. You may also click the triangle on the tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of project tasks you last viewed in the module.

The Actions menu allows you to perform the following operations:

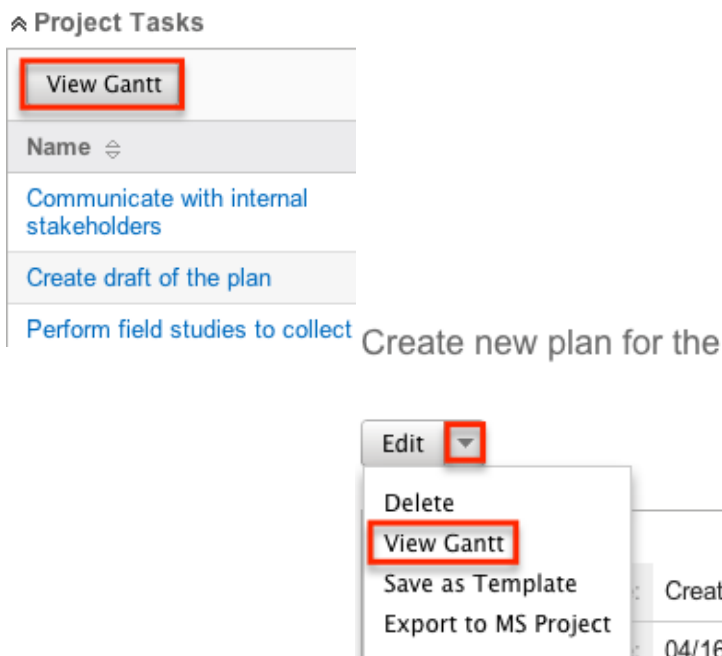
Menu Item	Description
Create Project	Opens the edit view layout to create a new project
Project List	Opens the list view layout to search and display projects
Project Tasks	Opens the list view layout to search and display project tasks

## Creating Project Tasks

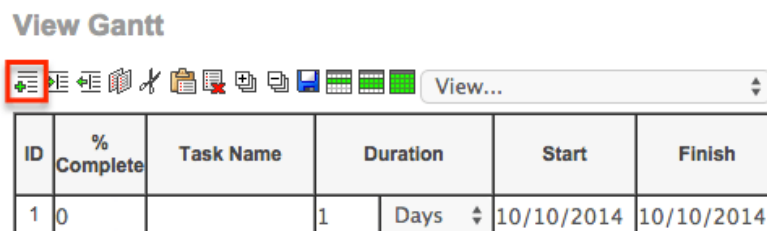
Project Tasks can only be created from the Gantt chart's project grid. The tasks are specific to each project, so they must be created directly from the project. When creating a Project Task from the grid, you will be able to put in basic information about the task. To add additional information later, please review the Editing Project Tasks section of this documentation.

Use the following steps to create a project task via the Projects module:

1. Navigate to the detail view of the project where you would like to add tasks.
2. From the detail view, select "View Gantt" from either the Project Tasks subpanel or the Action Menu.



3. Add a row to the grid next to the Gantt chart. This can be done using the icon in the toolbar or by right clicking on the grid.



4. Fill in the grid columns on the new row that you created. When complete, click the save icon the toolbar.

## View Gantt

ID	% Complete	Task Name	Duration
1	0	Prepare initial filings	2 Days

## Viewing Project Tasks

There are various options available for viewing project tasks in Sugar including via the grid and Gantt chart, the My Projects Dashboard, Project Tasks list view, Project Tasks detail view, Project Tasks Recently Viewed menu, dashlets, and reports.

### Viewing Project Tasks via Gantt Chart

The Projects module includes a grid and Gantt chart, which allows you to view all project tasks related to a specific project in one place. The grid, on the left of the screen, outlines each task with pertinent information regarding each project task. The Gantt chart, on the right, shows a timeline of each task and how they overlap. For more information on the Gantt chart, please review the Project Tasks Gantt Chart section of this documentation.

[Create new plan for the annual audit](#)

### View Gantt

ID	% Complete	Task Name	Duration	Start	Finish	Predecessors	Res
1	100	Communicate with internal stakeholders	2 Days	04/15/2013	04/16/2013		Joseph
2	38	Create draft of the plan	7 Days	04/17/2013	04/25/2013	1	Joseph
3	75	Perform field studies to collect data	18 Days	04/18/2013	05/13/2013		Will We
4	0	Update draft of the plan	6 Days	04/26/2013	05/03/2013	2	Admini
5	50	Gather data from meetings	2 Days	05/14/2013	05/15/2013	3	Joseph

### Viewing Project Tasks via My Projects Dashboard

The Project Dashboard allows for users to view any upcoming or overdue project tasks that are assigned to the user, or are related to any projects for which the user is the assigned user. The Project Dashboard can be reached by clicking the appropriate link in the Projects module tab.

The "My Projects Dashboard" panel shows four columns, showing projects that are assigned to you, any overdue project tasks where the Finish Date is in the past, any upcoming project tasks where the Start Date is within the next week, and any

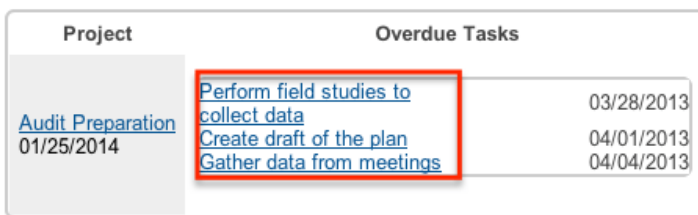
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cases that are open related to the project.

The "My Project Tasks" panel shows two columns, showing any overdue project tasks assigned to you where the Start Date is in the past, any upcoming project tasks assigned to you where the Finish Date is within the next week.

Any project task link is clickable and will take you to the grid and Gantt chart for the given project. Next to the task name, Sugar also displays the Finish Date for the task.

#### My Projects Dashboard



The screenshot shows a dashboard section titled "My Projects Dashboard". It contains a table with two columns: "Project" and "Overdue Tasks". The "Project" column lists "Audit Preparation" with a start date of "01/25/2014". The "Overdue Tasks" column lists three tasks: "Perform field studies to collect data" (03/28/2013), "Create draft of the plan" (04/01/2013), and "Gather data from meetings" (04/04/2013). The task names are hyperlinks, and the first three characters of each link are highlighted with a red box.

Project	Overdue Tasks
<a href="#">Audit Preparation</a> 01/25/2014	<a href="#">Perform field studies to collect data</a> 03/28/2013
	<a href="#">Create draft of the plan</a> 04/01/2013
	<a href="#">Gather data from meetings</a> 04/04/2013

#### Viewing Project Tasks via List View

The Project Tasks list view displays all project records meeting the current search criteria. To access the list view, click the "View Project Tasks" option from the Projects module tab. While list view shows key project fields, you can click the project task's name to open the record in detail view. For more information on viewing project via list view, please refer to the Project Tasks List View section.

#### Viewing Project Tasks via Detail View

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

#### Viewing Project Tasks via Recently Viewed

As you work, Sugar will keep track of which project tasks you have recently viewed. Click the triangle on the Project Tasks module tab to see a list of your most recently viewed project tasks and click each name to open the project task in detail view.

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## Viewing Project Tasks 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 of any module. You can view project task information in List View dashlets specific to the Project Tasks module (e.g. My Project Tasks dashlet), as well as List View dashlets based on other modules such as "My Calls". Clicking a project task's name from any dashlet will open the Project Tasks detail view. For more information on using dashlets and viewing project task records via dashlets, please refer to the Intelligence Pane documentation.

The screenshot shows a dashboard titled "My Dashboard" with two side-by-side dashlets. The left dashlet is titled "My Project Tasks" and has a table with columns: Name, Project Name, and Start Date. The right dashlet is titled "My Calls" and has a table with columns: Subject, Related to, and Start Date. In both tables, the first row has a "Create Draft of the..." button highlighted with a red box.

My Project Tasks			My Calls		
Name	Project Name	Start Date	Subject	Related to	Start Date
<a href="#">Create Draft of the...</a>	<a href="#">My Test Project</a>	2015-06-11	<a href="#">Call with John (Pro...</a>	<a href="#">Create Draft of the...</a>	2015-06-15 11:00

## Viewing Project Tasks via Reports

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

## All Project Tasks ☆

Title: All Project Tasks

Run Report ▾

Hide Details

**Name:** All Project Tasks **Type:** Rows and Columns Report  
**Modules:** Project Tasks **Teams:** Global  
**Display Columns:** Name, % Complete, Duration, Duration Unit, Start Date, Finish Date **Assigned to:** Administrator  
**Schedule:** None  
**Filters:** None

Name	% Complete	Duration	Duration Unit	Start Date	Finish Date
Gather data from meeting	50	3	Days	10/13/2014	10/15/2014
Update draft of plan	0	5	Days	10/13/2014	10/17/2014

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

## Searching Project Tasks

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

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

Note: Project Tasks is hidden from Global Search by default. The administrator must enable it for your use.

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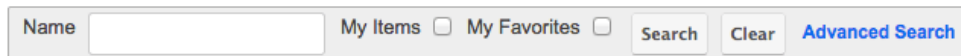
## Project Tasks Basic Search

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

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

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

Project Task: Home



The screenshot shows a search interface with a text input field labeled "Name". To the right of the input field are two checkboxes: "My Items" and "My Favorites". Further right are three buttons: "Search", "Clear", and "Advanced Search". The "Advanced Search" button is highlighted in blue.

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

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

## Project Tasks Advanced Search

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

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

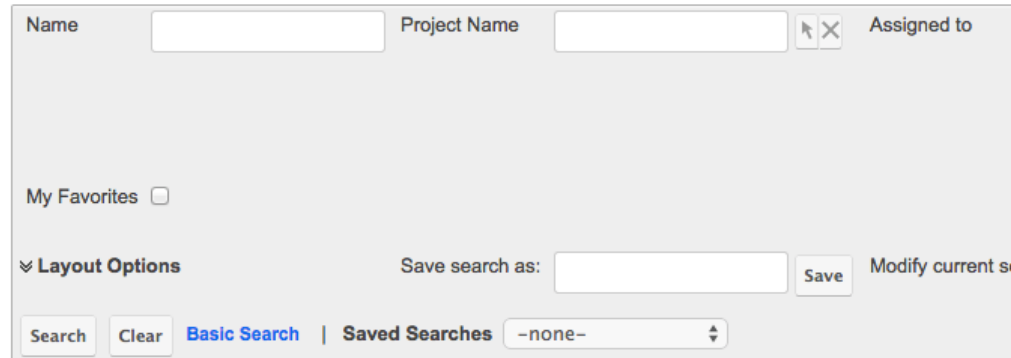
- Search : Click the Search button or press your Return/Enter key to perform



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the search.

- **Clear** : Click the Clear button to clear all criteria from the searchable fields.
- **Layout Options** : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- **Saved Searches** : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation. [Project Task: Home](#)



The screenshot shows a search panel with the following elements:

- Input fields for "Name", "Project Name", and "Assigned to".
- A "My Favorites" checkbox.
- An expandable "Layout Options" section.
- A "Save search as:" field with a "Save" button.
- Buttons for "Search" and "Clear".
- A navigation bar with "Basic Search" (highlighted) and "Saved Searches" (with a dropdown menu showing "-none-").

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

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

## Project Tasks List View

The Project Tasks list view displays all project tasks meeting the current search criteria and to which your user has access. You can view the basic details of each project task within the field columns. Please note that you will only be able to see project tasks as allowed by your team membership, user access type, and assigned roles. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide.

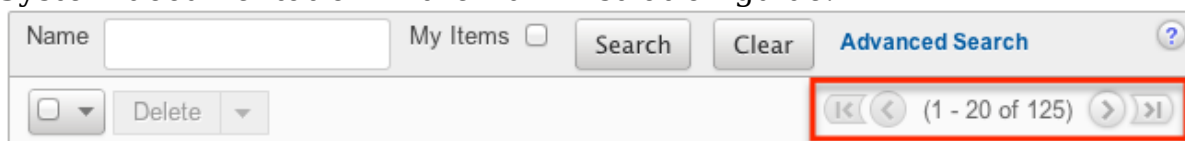
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You have the option to change what fields are displayed in list view by configuring your layout options in the Project Tasks Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the Search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

## Project Tasks Pagination

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

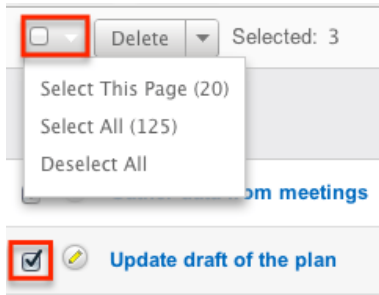
By default, Sugar displays 20 records per list view page, but administrators can change the number of records displayed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the System documentation in the Administration guide.



## Project Tasks Checkbox Selection

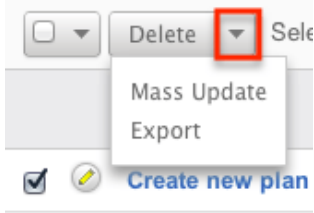
You can perform several actions on project task records directly from the list view by first selecting the desired records. To select individual project tasks on the Project Tasks list view, mark the checkbox on the left of each row. To select or deselect multiple project tasks on the list view, use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

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



## Project Tasks Actions Menu

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



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


Menu Item	Description
Delete	Delete one or more project tasks at a time
Mass Update	Mass update one or more project tasks at a time
Export	Export one or more project tasks to a CSV file

## Favorite Designation

Users have the option to mark project tasks 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 Project Tasks module tab. In the Project Tasks list view, the star on the left of each record's row is yellow once marked to indicate a favorite record. For more information on how to mark records as favorites, please refer to the Favoriting Projects Tasks section of this documentation.


## Project Tasks More Information

Additional details for each project task can be viewed by clicking the "i" icon to the far right of each list view row. This provides users a quick view of additional project task information in addition to what appears in the display column fields. The resulting pop-up window will show the Description field by default. The list of fields appearing here may only be configured through a code-level customization.

Name	Project Name	Start Date	Finish Date	Priority	% Complete	Assigned To
<a href="#">Gather data from meetings</a>	<a href="#">Create new plan for the annual audit</a>	05/15/2013	05/15/2013	Low	50	Administrator 

## Project Tasks Column Sorting

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

Name	Project Name	Start Date	Finish Date
<input type="checkbox"/>  <a href="#">Gather data from meetings</a>	<a href="#">Create new plan for the annual audit</a>	05/15/2013	05/15/2013

## Project Tasks Detail View

The Project Tasks detail view displays thorough project task information including all project task fields which are grouped by default into one panel. You can also view a project task's related records (Activities, History, etc.), which appear in subpanels beneath the project task fields. The detail view can be reached by clicking a project task's link from within Sugar including from the Project Tasks list view.

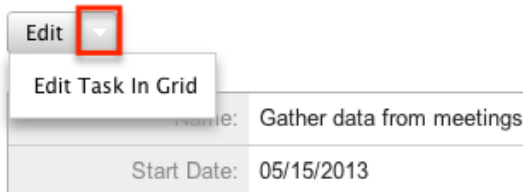
Please note that you will only be able to view a project task record according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Teams and Roles documentation in the Administration guide. Users with administrator or developer access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

## Project Tasks Actions Menu

The Actions menu on the top left of each project's detail view allows you to perform two actions on the current record. Administrator users can change the

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

#### Gather data from meetings



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

Menu Item	Description
Edit	Edit this project task
Edit Task In Grid	View the project task's parent project's Grid and Gantt chart

#### Favorite Designation

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

#### Next or Previous Project Task Record

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

#### Gather data from meetings



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## Project Tasks Subpanels

Beneath a project task's fields are subpanels containing related records from various modules, including different activities such as calls and meetings, as well as a history of notes and emails.

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

## Project Tasks Related Record Subpanels

The most common type of subpanels displayed on a project task's detail view contain the project task's related records belonging to various modules. The relationship type determines whether a related record will be displayed in the field listing or in a subpanel. Out-of-the-box, the Project tasks module does not include any relationships to other modules that would cause a related record to be displayed in the field listing. However, a project task may be related to multiple notes which means that the related notes will be displayed in a subpanel beneath the fields. Please note that the Project Tasks module displays the Activities and History subpanels by default. Administrators can create new relationships between various modules in Sugar to create additional subpanels. For more information on creating relationships, please refer to the Studio documentation in the Administration guide.

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

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

- To view the details of a related record, click the record's name in the subpanel or choose "View" from the Actions menu on the far right of the record's row to open it in record view.
- To relate a new record to the project task, choose the Create option (e.g. Create Task) from the subpanel's Action menu, then complete the record view

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layout and click "Save".

- To delete the project task's relationship to a record, choose "unlink" from the Actions menu on the far right of the record's row. This removes the relationship, but does not delete the record itself.
- To close an activity (e.g. Tasks) from the Activities subpanel, choose "close" from the Actions menu on the far right of the record's row. This moves the record to the History subpanel within the Project Tasks record.
- 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.

The screenshot shows the 'Activities' subpanel header with a 'Create Task' button. Below is a table with columns: Subject, Status, Contact, Due Date, and Assigned User. Two rows are visible: 'Follow up with client' (Not Started, Heidi Breit, 2015-06-24, Administrator) and 'Team Meeting' (Scheduled, 2015-06-16 14:30, Administrator). Action buttons 'view', 'close', and 'unlink' are shown on the right side of the rows.

Subject	Status	Contact	Due Date	Assigned User	Actions
Follow up with client	Not Started	Heidy Breit	2015-06-24	Administrator	view
Team Meeting	Scheduled		2015-06-16 14:30	Administrator	close unlink

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

#### Project Tasks Activities and History Subpanels

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

**Activities**

Create Task  (1 -)

Schedule Meeting  
Log Call  
Compose Email

Status	Contact	Due Date	Assigned User
Planned	Meeting	04/19/2013 03:00pm	Administrator

**History**

Create Note or Attachment (1 -)

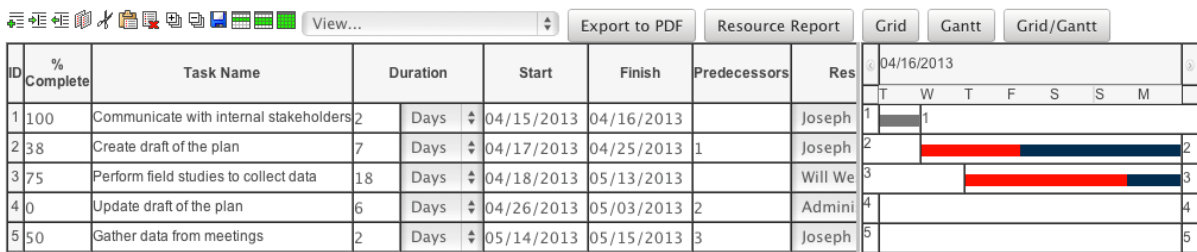
Subject	Status	Contact	Date Modified	Date Created	Assigned User
Notes from meeting	Note		04/18/2013 11:58am	04/18/2013 11:58am	Administrator

## Project Tasks Gantt Chart

The Projects module includes a grid and Gantt chart to allow you to visualize, track, and easily make changes to your project tasks all in one place. This menu is accessible from each project's detail view through the Actions Menu or the Project Tasks subpanel. The page consists of a grid which shows each project task, as well as information on the timing, % complete, preceding tasks, and who is responsible for completing the task. Project tasks on the grid can be edited by clicking on the specific cell and making in-line changes. Whole rows can be selected by clicking the Task ID number in the ID column on the far left column. The Gantt chart shows a timeline of each task represents which tasks are being worked on at a given time.

[Create new plan for the annual audit](#)

### View Gantt



## Gantt Chart Toolbar

The Gantt Chart Toolbar allows you to make changes to both what tasks are showing on the grid, but also how they are displayed. The icons and menus perform the following actions, from left to right:

Toolbar Option	Description
Add New Row	Adds a new row to the end of the task



	list, unless a row is selected, when the button will add the row above the selection
Indent Row	When a row is selected, this button will make it a subordinate function of the above row, causing any subordinate tasks to be grouped under the parent task
Outdent Row	When a row is selected and already indented, this button will move it out from being a subordinate function of the above row and making it its own task
Copy Row	When a row is selected, the Copy button will allow the data in the row to be placed in another row while keeping the original intact
Cut Row	When a row is selected, the Cut button will delete the entire row, but allow it to be pasted into another as an ensuing action
Paste Row	Adds currently copied or cut row to the end of the task list, unless a row is selected, when the button will place the row above the selection
Delete Row	When a row is selected, the Delete button will remove the entire row and delete the project task
Expand All	This button will affect the entire grid by expanding all hidden rows created by indenting to show all rows on the grid
Collapse All	This button will affect the entire grid by collapsing all visible indented rows on the grid
Save	Saves all changes to the grid and updates the related project task records
Week View	Changes the Gantt chart to show one week of events at a time
2 Week View	Changes the Gantt chart to show two weeks of events at a time
Month View	Changes the Gantt chart to show one month of events at a time

View...	Dropdown list to provide filters to change which project tasks are showing on the grid
Export to PDF	Exports a PDF from Sugar containing the information shown in the task grid
Resource Report	Opens the Resource Report popup
Grid	Changes the view of the page to only show the task grid and releted toolbar buttons
Gantt	Changes the view of the page to only show the Gantt chart and releted toolbar buttons
Grid/Gantt	Changes the view of the page to show both the task grid and Gantt chart

## Editing Project Tasks

Project Tasks may be edited at any time to update or add information to the record. You can make changes to existing project task records via the Gantt chart and Project Tasks edit view. Edit view is available within the Project Tasks module and includes all of the Project Task fields you should need.

[Gather data from meetings](#) » Edit

**Save**
Cancel
View Change Log
Save and Continue

Name: \*

Duration: \* 2 Days

Start Date: 05/15/2013

Status:

% Complete: 50

Task ID: 5

Finish Date: 05/15/2013

Priority:

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

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

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## Editing Project Tasks via Detail View

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

Gather data from meetings



Name:	Gather data from meetings
Start Date:	05/15/2013

## Editing Project Tasks via Gantt Chart

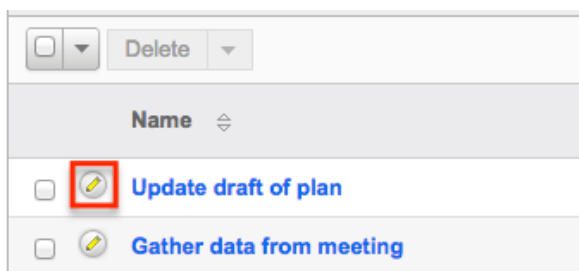
Project Tasks can be edited one at a time via the task grid and Gantt Chart. The Gantt chart can be accessed via the Projects detail view and Project Tasks detail view. Project Task fields can be edited by clicking on the field, either if it is empty or if it contains existing data, and edits can be made directly inline on the grid. Selecting the entire row can be done by clicking the ID number for the row of each project task. Multiple tasks can be selected by holding the Shift key on your keyboard while clicking.

The following fields can be edited from the task grid and Gantt chart:

- % Complete
- Task Name
- Duration
- Start
- Finish
- Predecessors
- Resource
- Actual Duration

## Editing Project Tasks via List View

You can edit project tasks via the list view by clicking the Pencil icon to the left of each project task's name. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.



## Deleting Project Tasks

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

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

### Deleting Project Tasks via Gantt Chart

Use the following steps to delete a project task via the Gantt chart:

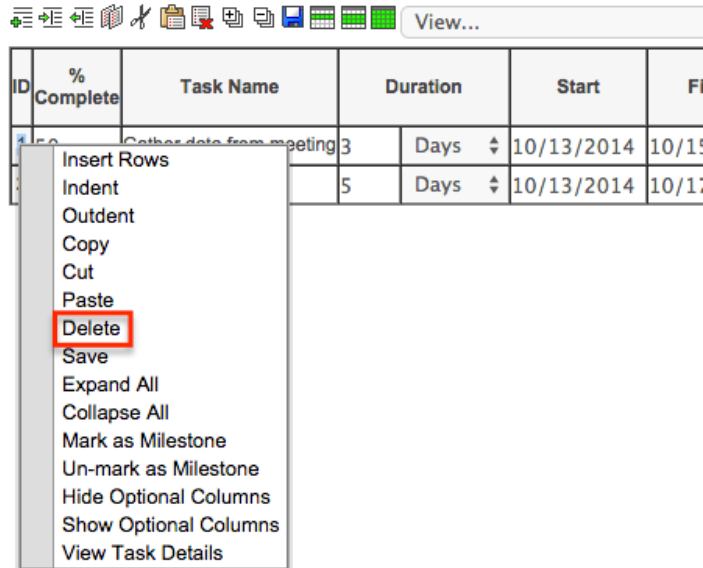
1. Navigate to the project's Gantt chart
2. Select the project task's row by clicking on the ID number for the task

#### View Gantt

ID	% Complete	Task Name	Duration	Start	Finish
1	50	Gather data from meeting	3 Days	10/13/2014	10/15/2014
2	0	Update draft of plan	5 Days	10/13/2014	10/17/2014

3. Right click on the selected row and select the "Delete" option from the action menu, or click the "Delete" button from the Gantt toolbar

## View Gantt



ID	% Complete	Task Name	Duration	Start	End
3		Gather data from meeting	3 Days	10/13/2014	10/13/2014
5			5 Days	10/13/2014	10/13/2014

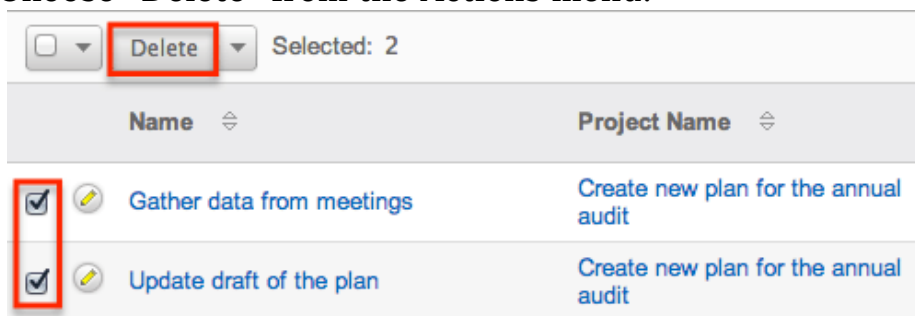
- Insert Rows
- Indent
- Outdent
- Copy
- Cut
- Paste
- Delete**
- Save
- Expand All
- Collapse All
- Mark as Milestone
- Un-mark as Milestone
- Hide Optional Columns
- Show Optional Columns
- View Task Details



4. Save the Gantt chart to confirm the change to the project.

## Mass Deleting Project Tasks via List View

Use the following steps to delete one or more project tasks via the list view:

1. Navigate to the Project Tasks list view by clicking the triangle on the Projects module tab and selecting "View Project Tasks".
2. Use the Basic or Advanced Search to find the project task records you wish to delete.
3. Select the desired project tasks individually or using the checkbox dropdown's options.
4. Choose "Delete" from the Actions menu.



Selected: 2	
Name	Project Name
<input checked="" type="checkbox"/>  Gather data from meetings	Create new plan for the annual audit
<input checked="" type="checkbox"/>  Update draft of the plan	Create new plan for the annual audit

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

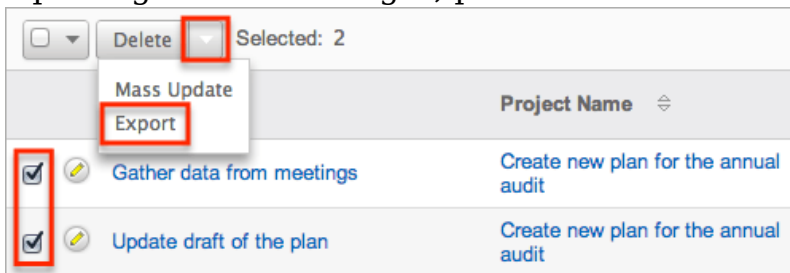
Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of project task records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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## Exporting Project Tasks

Sugar's Export option allows users to download all fields for the selected project tasks to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use Project data with other software such as Microsoft Excel. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of project tasks. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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



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

## Mass Updating Project Tasks

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

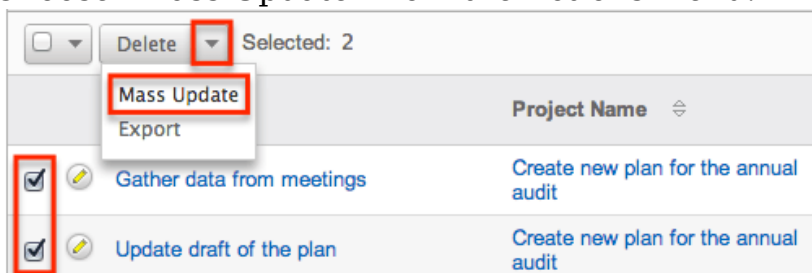
Please note that your ability to mass update project tasks may be restricted by a role. For more information on roles, please refer to the Role Management

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documentation in the Administration guide. Check with your system administrator if you do not see the Mass Update option.

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

1. Navigate to the Project Tasks list view by clicking the triangle on the Projects module tab and selecting "View Project Tasks".
2. Use the list view's Basic or Advanced Search to find project tasks you wish to modify.
3. Select the desired project tasks individually or using the checkbox dropdown's options.
4. Choose "Mass Update" from the Actions menu.



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

Mass Update

Status:	<input type="text" value="-none-"/>	Start Date:	<input type="text"/>
Finish Date:	<input type="text"/> (mm/dd/yyyy)	Due Date:	<input type="text"/>
Assigned To:	<input type="text"/>	Priority:	<input type="text" value="-none-"/>
Created by:	<input type="text"/>	Milestone:	<input type="text" value="-none-"/>
Teams	<input type="text"/> <input type="button" value="+"/> <input type="button" value="-"/> <input type="radio"/> Primary		
	<input checked="" type="radio"/> Replace <input type="radio"/> Add		

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

## Favoriting Project Tasks

Each Sugar user has the option to designate their own favorite project tasks which are important or will be viewed often so that they can easily be accessed via search or from the Project Tasks module tab. Once records are marked as favorites, use

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the My Favorites checkbox in the Project Tasks Basic or Advanced Search to retrieve your favorites or select from your most recent favorites directly from the Project Tasks module tab.

## Favoriting via List View

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

1. Navigate to the Project Tasks list view by clicking "View Project Tasks" from the Projects module tab.
2. Use the Basic or Advanced Search to find the Project Tasks 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 gray.

## Favoriting via Detail View

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

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

Last Modified: 2018-01-04 20:21:51

# 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



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across most Sugar modules, such as viewing, editing, etc., please refer to the Working With Reports section of this page.

Note: Some of the examples in this documentation contain steps to create Opportunity reports. Users with Revenue Line Items enabled should adapt the steps to target the Revenue Line Items module.

## Report Fields

The Reports module contains a number of stock fields which come out-of-the-box with Sugar. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs. The following fields below 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
Schedule Report	The scheduled date and time for the scheduled report
Tags	User-created keywords that can be used to identify, organize, and group report records by common attributes

	Note: For more information on tags in Sugar, please refer to the Tags 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
<a href="#">Viewing Reports</a> <a href="#">Viewing via List View</a> <a href="#">Viewing via Recently Viewed</a> <a href="#">Viewing via Dashlets</a> <a href="#">Viewing via Preview</a>	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.
<a href="#">Searching for Reports</a> <a href="#">List View Search</a> <a href="#">Creating a Filter</a> <a href="#">Saving a Filter</a>	<p>The Searching for Records section provides an introduction to list view search, which searches and filters within the Reports module.</p> <p>Note: The Report module's Filter option includes the Recently Modified option as well which returns only records you have modified in the module within the last 7 days.</p>
<a href="#">Reports List View</a> <a href="#">Total Record Count</a> <a href="#">Create Button</a> <a href="#">List View Search</a> <a href="#">Checkbox Selection</a> <a href="#">Mass Actions Menu</a> <a href="#">Favorite Designation</a> <a href="#">Column Reordering</a>	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

<p>Column Resizing  Column Sorting  Column Selection  Preview  Record Actions Menu  More Reports  Intelligence Pane</p>	<p>the List View Mass Actions Menu and List View Record Actions Menu sections of this page.</p>
<p>Editing Reports  Editing Inline via List View  Editing via List View Preview  Mass Editing via List View  Editing Fields</p>	<p>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. The Editing Fields section provides instructions for modifying the different field types available in Sugar records.</p>
<p>Deleting Reports  Deleting via List View  Mass Deleting via List View</p>	<p>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.</p>
<p>Favoriting Reports  Favoriting via List View</p>	<p>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.</p>

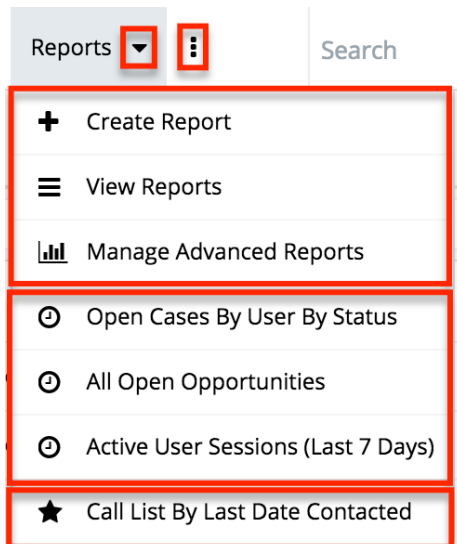
## Report Menus

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 to create a new report
View Reports	Opens the list view layout to search and display reports
Manage Advanced Reports	Opens the Advanced Reports tab to create and view advanced reports

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.

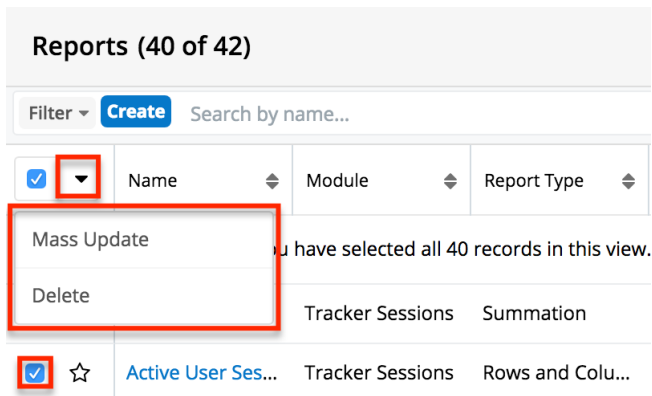
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## List View Menus

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.



<input type="checkbox"/>	<input type="checkbox"/>	Name	Module	Report Type	User		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	User Sessions ...	Tracker Sessions	Summation	Adminis		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Active User Ses...	Tracker Sessions	Rows and			<ul style="list-style-type: none"> <li>Edit</li> <li>Edit Report</li> <li>Delete</li> </ul>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Records Modifi...	Trackers	Rows and			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	My Recently M...	Trackers	Rows and			

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
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.

### Customer Account List

**Title: Customer Account List**

Run Report

- Share
- Edit
- Copy
- Schedule
- Print as PDF
- Export
- Delete

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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
Schedule	Schedule this report to be delivered via email
Print as PDF	Download this report as a PDF file
Export	Export this report's result to a CSV file  Note: Only available for Rows and Columns-type report
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. Please note that only Rows and Columns-type reports can be exported as a CSV (comma-separated values) file in Sugar. For more information on creating a Rows and Columns report, please refer to the Rows and Columns Report section.



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## 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.

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## Creating via Reports Module

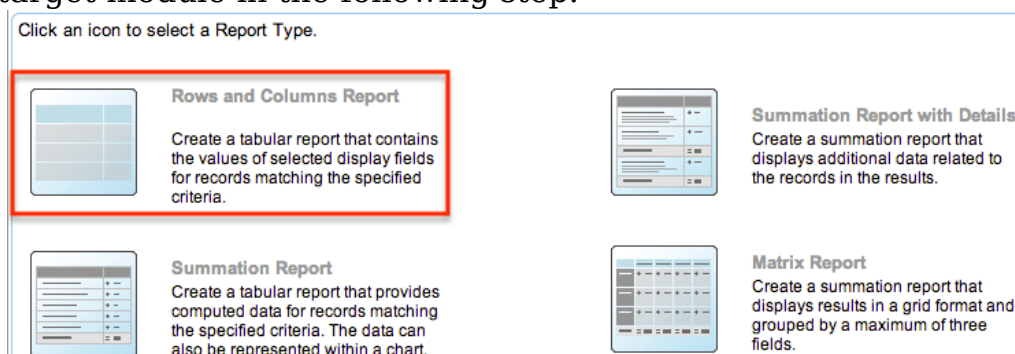
The most common method of report creation is via the Reports module using the Create button in the list view or the Create Report option in the module tab. This opens the Report Wizard which allows you to build the necessary report and generate the results accordingly. The following sections cover creating the four different report types via the Reports module.

### 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. Please note that only Rows and Columns-type reports have the ability to be exported to a CSV file in Sugar.

The following steps cover creating a Rows and Columns report for calls with a status of "Held" as an example:

1. Click the triangle in the Reports module tab and select "Create Report".
2. Choose "Rows and Columns Report" as the report type and "Calls" as the target module in the following step.



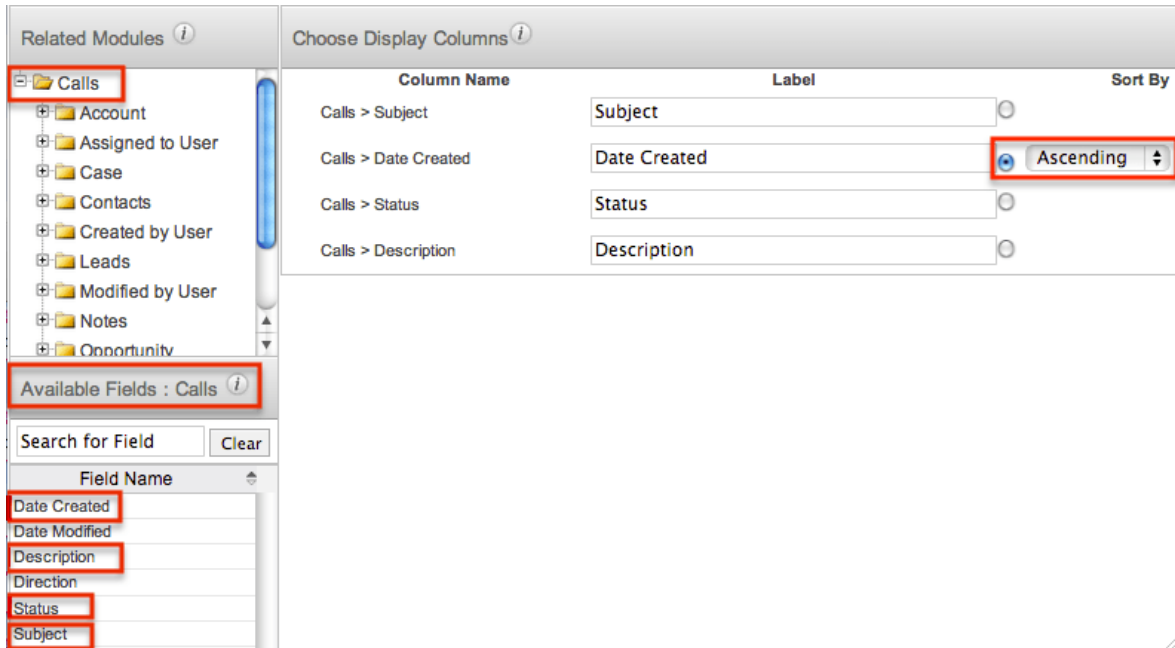
3. To filter on a field related to the target module, select it from the Available Fields list on the bottom left to add it to the list of filters. In this example, select "Status" to filter the report based on call records already held. Click "Next".
  - o For more information on report filters, please refer to the Report Filters section.

< Back **Next >** Cancel

The screenshot shows a software interface with two main panels. The left panel, titled 'Related Modules', contains a tree view with 'Calls' selected and expanded. Under 'Calls', several sub-modules are listed: Account, Assigned to User, Case, Contacts, Created by User, Leads, Modified by User, Notes, and Opportunity. Below this tree is a section for 'Available Fields : Calls' with a search box and a 'Clear' button. A list of fields is shown, with 'Subject' and 'Status' highlighted with red boxes. The right panel, titled 'Define Filters', shows a 'Select Operator' dropdown set to 'AND'. Below this, a filter rule is defined: 'Calls > Status' is followed by a dropdown set to 'Is' and another dropdown set to 'Held', which is also highlighted with a red box. A 'Run-time' checkbox is visible to the right of the filter rule.

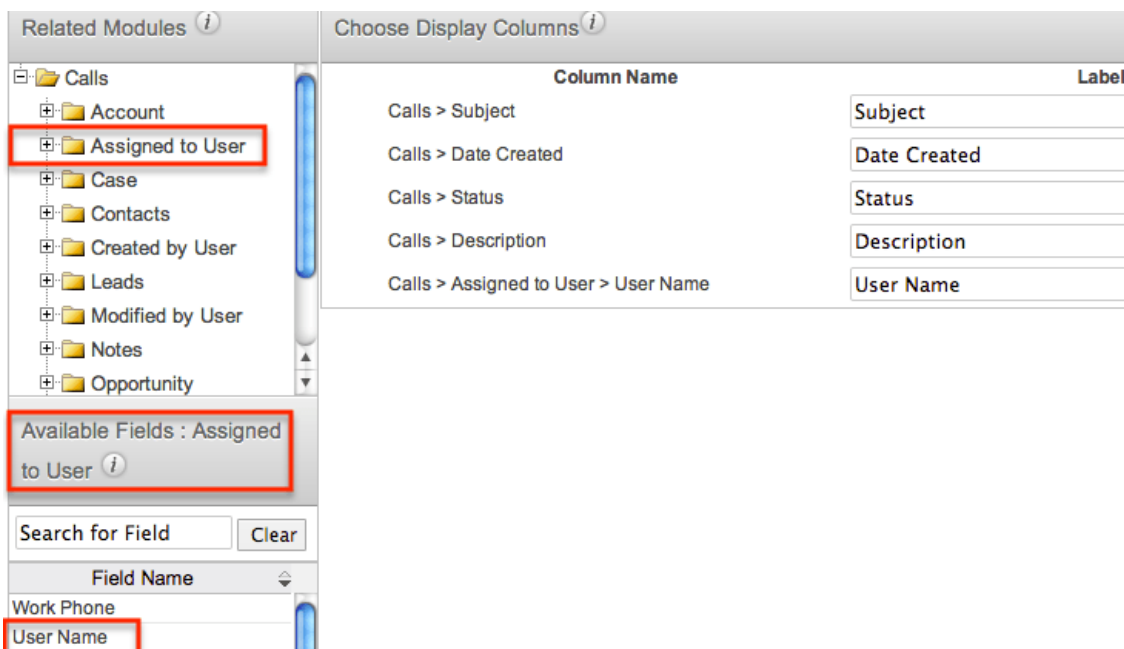
4. On the Choose Display Columns step, select the fields you would like included in the report results from the Available Fields list then click "Next". We are adding the following fields as an example: Subject, Status, Description, Date Created, User Name, Contacts Name, and Account Name.
  - For more 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
  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.

The screenshot shows a form for configuring a report. At the top, there are five buttons: "< Back", "Save", "Preview", "Save and Run", and "Cancel". The "Save and Run" button is highlighted with a red border. Below the buttons, the form has several sections. On the left, there are fields for "Report Name: \*", "Assigned to: \*", and "Teams: \*". On the right, there is a section titled "Calls with Held Status" with a dropdown menu showing "max" and a "Select" button. Below that, there is a "Primary" button and a "Global" dropdown menu with a minus sign and a blue circle icon. At the bottom, there is a section titled "Optional Related Modules: i" with three checked items: "Calls > Assigned to User", "Calls > Contacts", and "Calls > Account". This section is also highlighted with a red border.

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.

<b>Name:</b> Calls with Held Status <b>Modules:</b> Calls, Calls > Assigned to User, Calls > Contacts, Calls > Account <b>Display Columns:</b> Subject, Date Created, Status, Description, User Name, Contacts Name, Account Name <b>Schedule:</b> None <b>Filters:</b> A					<b>Type:</b> Rows and Columns Report <b>Teams:</b> Global <b>Assigned to:</b> Max Jensen	
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(1 - 4 of 4)						
Subject	Date Created	Status	Description	User Name	Contacts Name	Account Name
Follow up call	02/28/2013 03:20pm	Held	Call with Sheena regarding new account.	max	Sheena Rathbone	
Contract Renewal	03/04/2013 11:21am	Held	Call with Waverly Trading House regarding contract renewal.	max		Waverly Trading House

## Summation Report

The Summation Report 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.

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. Next, define the report filters as follows then click "Next":
  - o 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.
  - o 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.

### Report Wizard

Summation Report : [Select Module](#) > [Define Filters](#) > [Define Group By](#) > [Choose Display Summaries](#) > [Chart Options](#) > [Report Details](#)

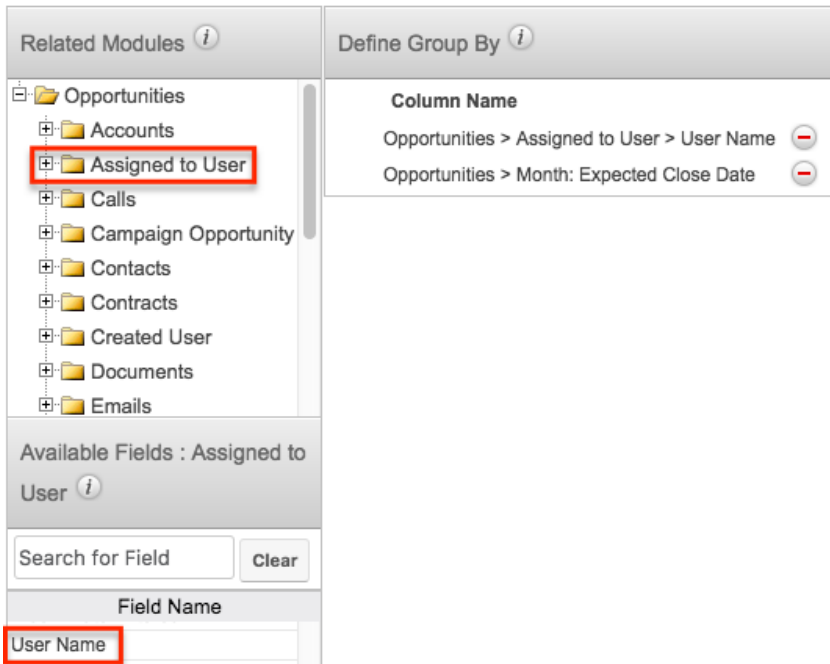
< Back **Next >** Save Preview Save and Run Delete Cancel

The screenshot shows the 'Define Filters' step of a report wizard. On the left, under 'Related Modules', 'Opportunities' is selected. Below it, 'Available Fields' for 'Opportunities' are listed, with 'Expected Close Date' and 'Sales Stage' selected. On the right, the 'Define Filters' panel shows two filters: 'Opportunities > Expected Close Date' with the operator 'Is Between' and dates '04/01/2017' and '06/30/2017', and 'Opportunities > Sales Stage' with the operator 'Is' and the value 'Closed Won'. The 'Run-time' checkbox is unchecked.

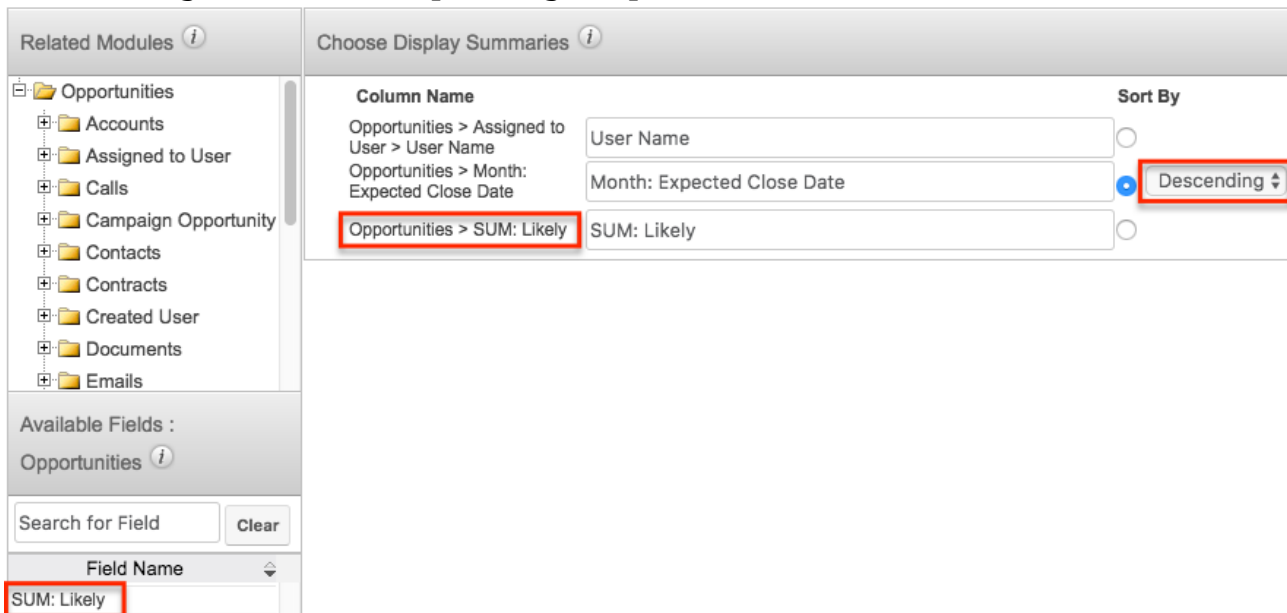
4. On the Define Group By step, select "User Name" and "Month: Expected Close Date", which will group the closed won opportunity records by the assigned user and month it was closed. Click "Next".
  - o You must click the related Assigned to User module to select the User Name field because user names are not direct fields of the Opportunities module. Note: When there are multiple group-by fields, their order in the Define Group By step determines which becomes the Y-axis of a chart and which field appears as different colors in a chart legend. You can drag and drop the fields within the Define Group By step to change which field ends up on the Y-axis of a chart.







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.

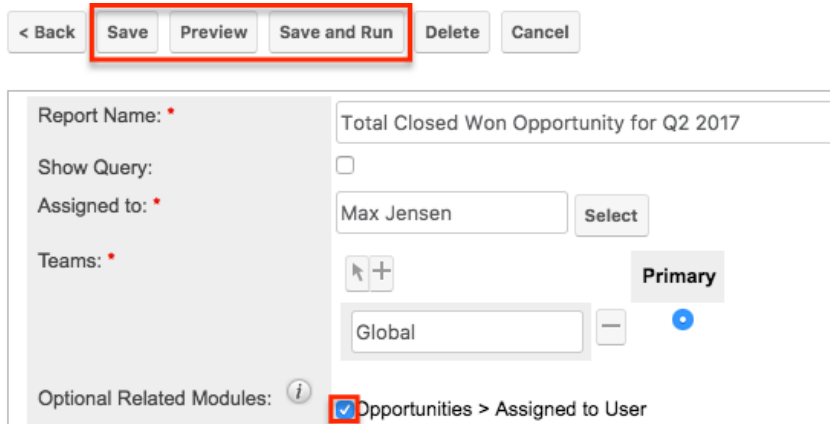


6. On the Chart Options step, select the chart type (e.g. Vertical Bar) you wish to display in the report as well as how the data should be summarized on the chart, then click "Next". For more information on setting up the chart options, please refer to the Report Chart Options section.
7. On the Report Details step, enter a name for the report and assign it to the

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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.

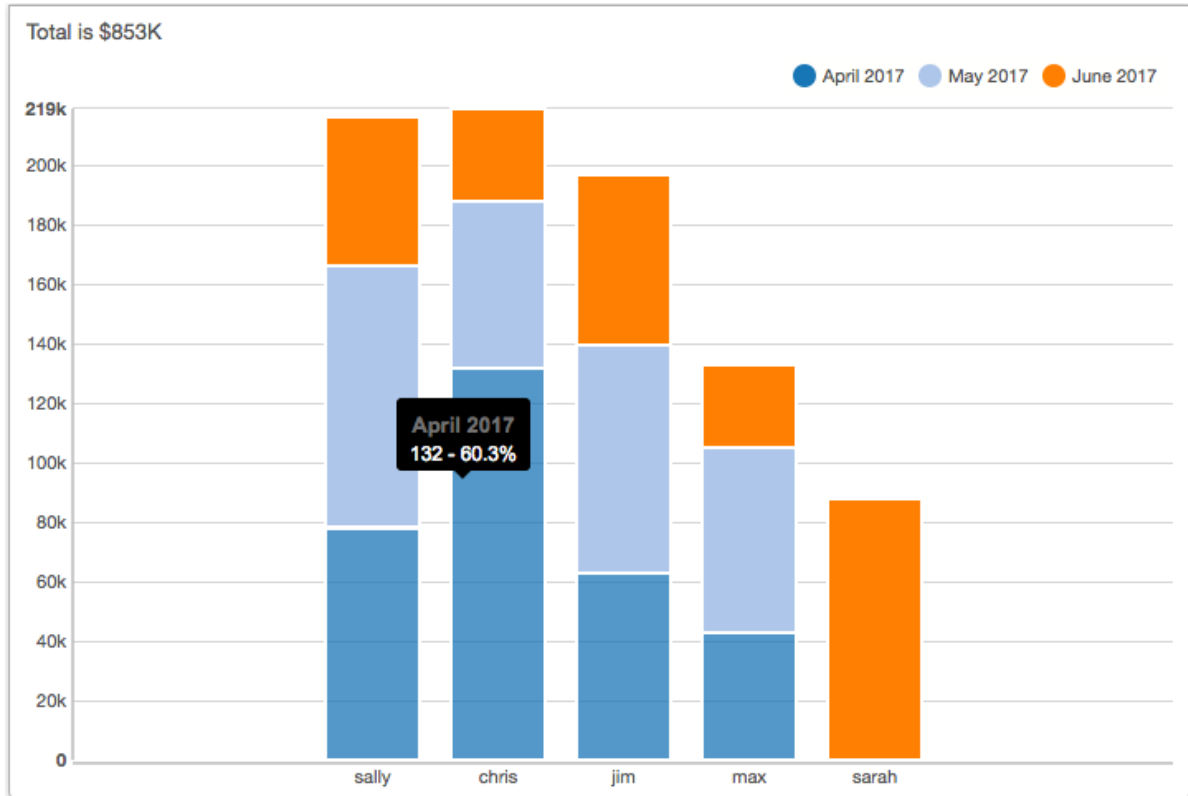


The screenshot shows a report configuration interface. At the top, there is a row of buttons: "< Back", "Save", "Preview", "Save and Run", "Delete", and "Cancel". The "Save and Run" button is highlighted with a red box. Below this is a form with the following fields:

- Report Name:** Total Closed Won Opportunity for Q2 2017
- Show Query:**
- Assigned to:** Max Jensen (with a "Select" button)
- Teams:** Global (with a "Primary" button and a blue plus icon)
- Optional Related Modules:**  Opportunities > Assigned to User

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

## 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"

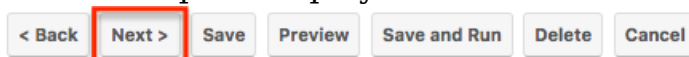
- Choose Display Summaries : Select "SUM: Likely" from the Available Fields panel then click "Next"

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.



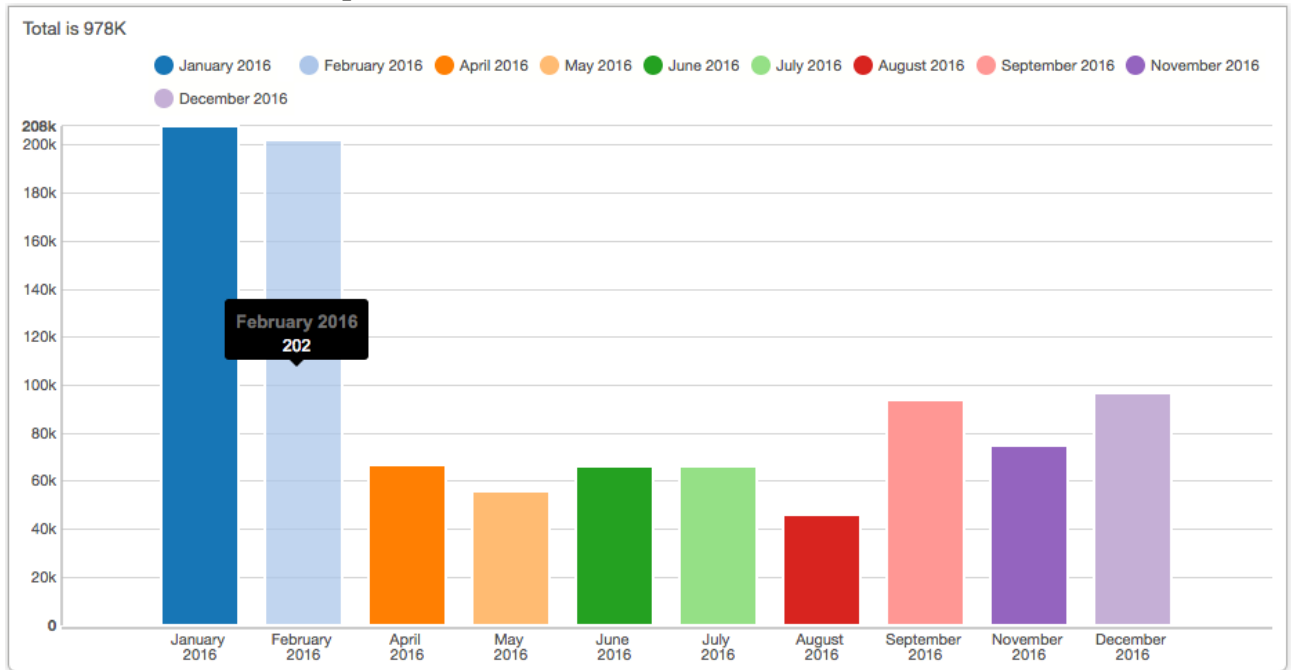
3. On the Chart Options step, select the chart type (e.g. Vertical Bar) you wish to display in the report as well as how the data should be summarized on the chart then click "Next".

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.
  - o Click the Preview button to preview the report before saving.
  - o Click the Save button to save the report without running it immediately.
  - o To view the corresponding chart values, simply hover your mouse over the bar in the report chart.



Collapse All

Month: Expected Close Date = January 2016, SUM: Likely = \$208,272.56				
Opportunity Name	Expected Close Date	Opportunity Amount	Sales Stage	User Name
<a href="#">Spindle Broadcast Corp.</a>	01/30/2016	\$50,950.00	Closed Won	<a href="#">will</a>
<a href="#">Chandler Logistics Inc</a>	01/27/2016	\$51,683.00	Closed Won	<a href="#">chris</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.

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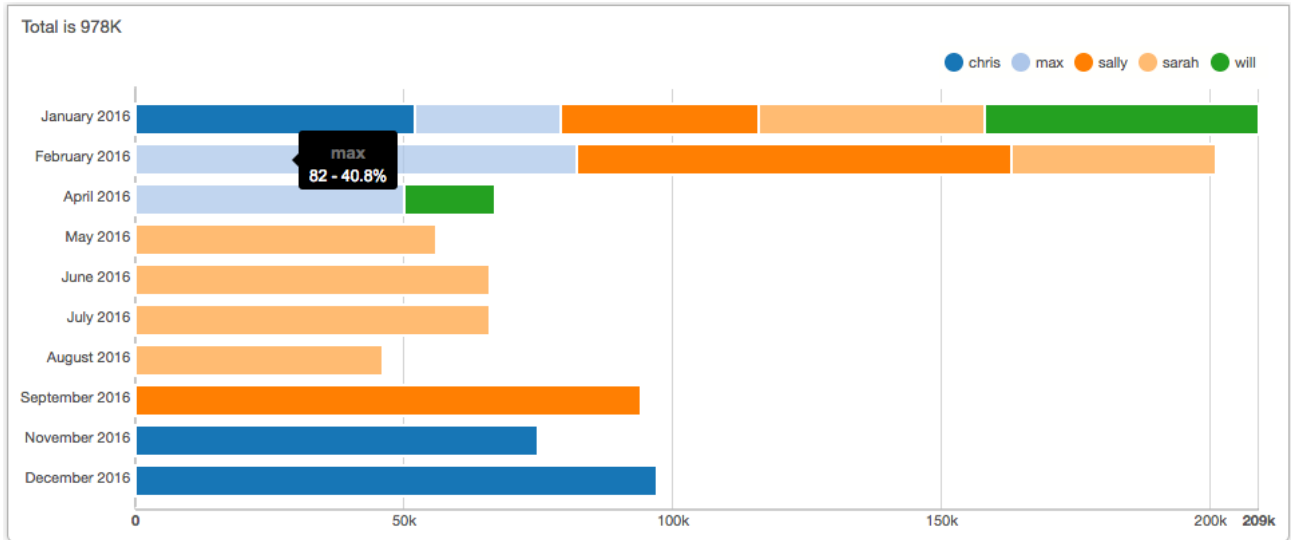
The 2x1 layout option displays the data for the first two group-by fields in rows and displays the data for the third group-by field in a column. If you only have two group-by columns, you can manually change the report layout by dragging and dropping the group-by fields to a different order on the Define 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 (e.g. Horizontal Bar) 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.
  - 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

displayed on the report grid.

4. After entering the report details, click "Save and Run" to save and generate the report immediately.
  - o Click the Preview button to preview the report before saving.
  - o Click the Save button to save the report without running it immediately.
  - o To view the corresponding chart values, simply hover your mouse over the bar in the report chart.



SUM: Likely

Month: Expected Close Date	User Name					Grand Total
	chris	max	sally	sarah	will	
January 2016	\$51,683.00	\$27,472.00	\$36,522.00	\$41,645.56	\$50,950.00	\$208,272.56
February 2016		\$82,423.33	\$80,942.22	\$38,284.00		\$201,649.55

## Creating 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. Please note that you have the option of duplicating the report as the original report type you are currently viewing or any of the other three report types.

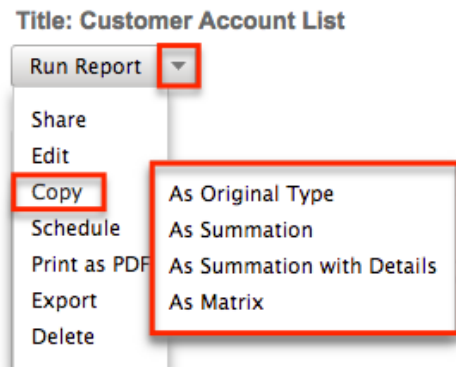
The following steps cover creating a report by duplicating an existing Rows and Columns-type report as an example:

1. Navigate to a report's detail view.
2. Click the Actions menu and select "Copy".
3. Choose the report type (e.g. As Summation) you would like the duplicated report to be.



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## Customer Account List ☆



4. Go through the Report Wizard to select and enter new data as necessary then enter a new name for the report and save.
  - Please note that if you select 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 as necessary to meet the specific report type requirements.

## Report Options

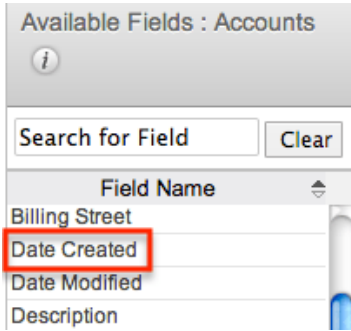
There are various steps involved when creating reports in Sugar and the steps can vary slightly depending on the report type (e.g. Summation report) chosen. The following sections below provide additional detail regarding some of the steps (e.g. Define Filters, Choose Display Columns) involved when creating reports.

## Report Filters

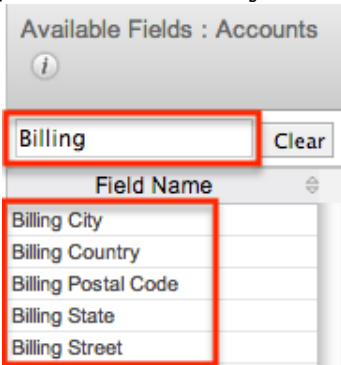
The Define Filters step of the report wizard determines which records the report includes or filters out. Filter groups and operators allow for additional levels of complexity as you combine filters to get the precise result set you desire.

## 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.

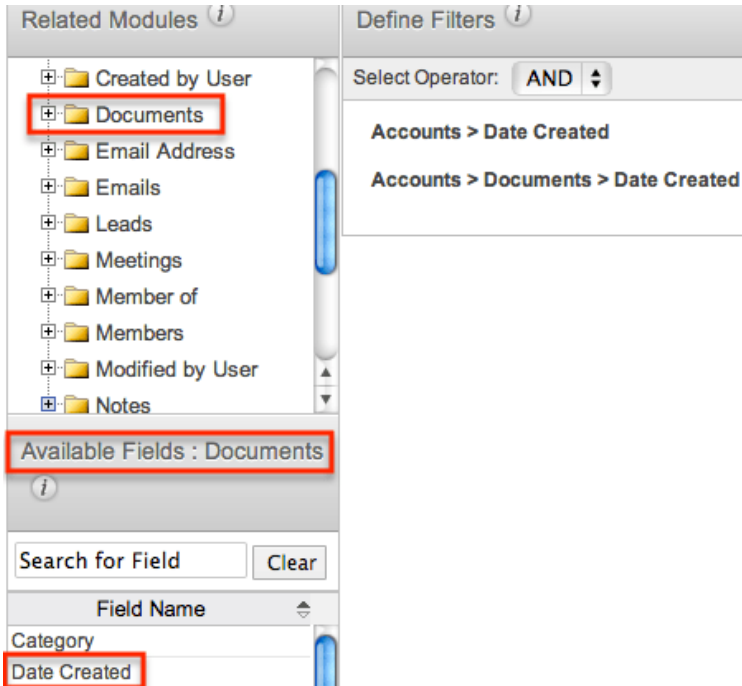


You can also use the search feature above the Available Fields list to easily locate a field. Enter the appropriate keyword (e.g. billing, date) in the search field and the matching results will display in the Available Fields list. Sugar automatically appends the wildcard character (%) to the beginning and end of your search phrase, so the system will return all fields that contain the keyword.

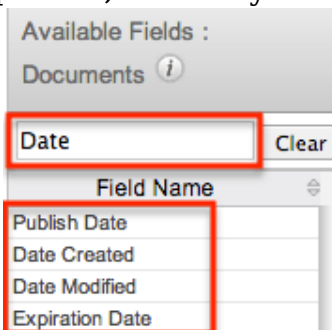


## Related Module Filters

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.

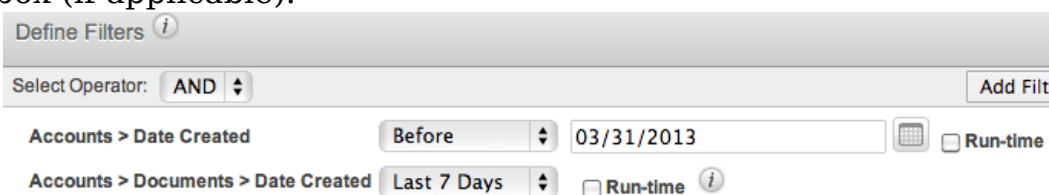


You can also use the search feature above the Available Fields list to easily locate a field. Enter the appropriate keyword (e.g. billing, date) in the search field and the matching results will display in the Available Fields list. Sugar automatically appends the wildcard character (%) to the beginning 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).



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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.

### Customer Account List ☆

Title: Customer Account List

Run Report ▾

Report filters have been modified since last run.

Hide Details

Name: Customer Account List

## 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.

The screenshot shows the 'Define Filters' interface. At the top, there is a 'Select Operator' dropdown set to 'AND' and an 'Add Filter' button. Below this, two filter entries are visible: 'Accounts > Date Created' with a 'Before' dropdown and a date field '03/31/2013', and 'Accounts > Documents > Date Created' with a 'Last 7 Days' dropdown. Both filter entries have a 'Run-time' checkbox, with the first one checked and highlighted by a red box.

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.

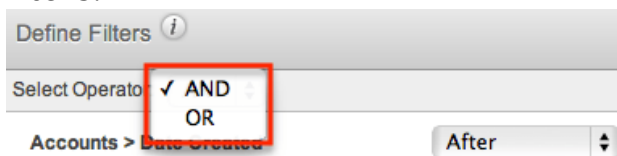
The screenshot shows the 'Run-time Filters' interface. It displays a single filter entry: 'Accounts > Date Created >' with a 'Before' dropdown and a date field '03/31/2013'. Below the filter entry, there are two buttons: 'Apply' and 'Reset', with the 'Apply' button highlighted by a red box.

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.

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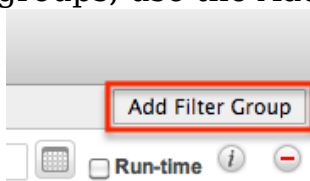
## Operators

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.

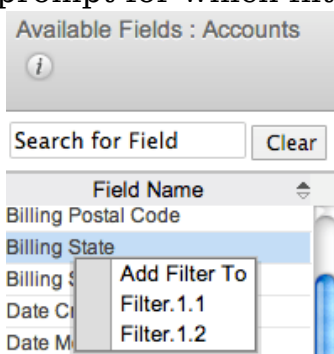


## Filter Groups

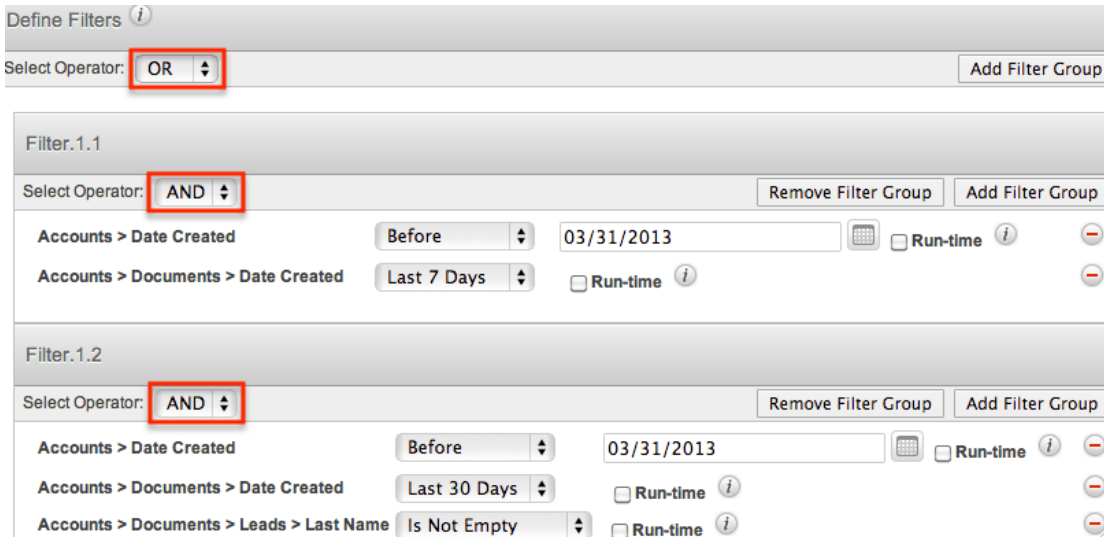
By default, all filters will be added to a single group. To split filters into multiple groups, use the Add Filter Group button.



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.

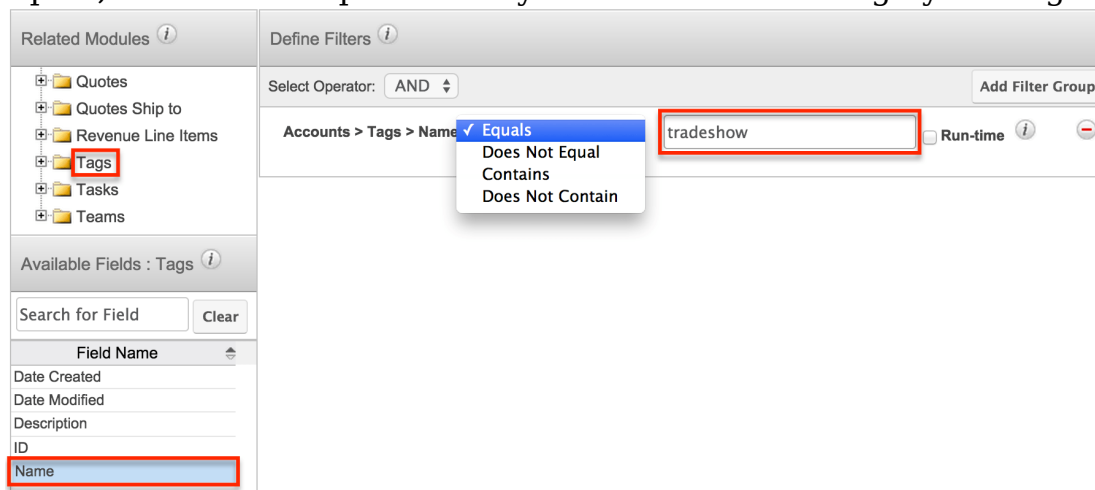


Filter groups and operators can be combined to achieve complex filtering situations. For example, if we need a report for documents belonging to accounts created prior to the first quarter where the document is either new this week or new this month is connected to a lead, we would use the following 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). Therefore, 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).

Select Operator: **OR** Add Filter Group

Accounts > Tags > Name	Equals	manufacturing	<input type="checkbox"/> Run-time <i>i</i>	<span>⊖</span>
Accounts > Tags > Name	Equals	laser	<input type="checkbox"/> Run-time <i>i</i>	<span>⊖</span>
Accounts > Tags > Name	Equals	hot prospect	<input type="checkbox"/> Run-time <i>i</i>	<span>⊖</span>

In the next example, choosing "AND" as the operator means the report will only display accounts that meet all of the specified criteria:

- The account is tagged "manufacturing".
- The account is tagged with a tag that contains the term "laser" such as "laser processing" or "high-speed laser".
- The account has not been tagged with any tag that contains the term "edu" such as "education" or "educator".

Select Operator: **AND** Add Filter Group

Accounts > Tags > Name	Equals	manufacturing	<input type="checkbox"/> Run-time <i>i</i>	<span>⊖</span>
Accounts > Tags > Name	Contains	laser	<input type="checkbox"/> Run-time <i>i</i>	<span>⊖</span>
Accounts > Tags > Name	Does Not Contain	edu	<input type="checkbox"/> Run-time <i>i</i>	<span>⊖</span>

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.

Name	Tag	Office Phone	Type
<a href="#">Cumberland Trails Inc</a>	<a href="#">laser</a>	(190) 868-0957	Customer
<a href="#">Cumberland Trails Inc</a>	<a href="#">manufacturing</a>	(190) 868-0957	Customer

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 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 Forecasting module, please refer to the Forecast Configuration documentation in the Administration guide.

Note: When generating reports with datetime filters, Sugar will always adjust the results to ensure they are accurate according to the time zone settings of the user accessing the report. For instance, a user on Eastern Standard Time (-5 GMT) may see a different set of results for a report than would a user on Pacific Standard Time (-8 GMT) because the date ranges are adjusted for the user's time zone.

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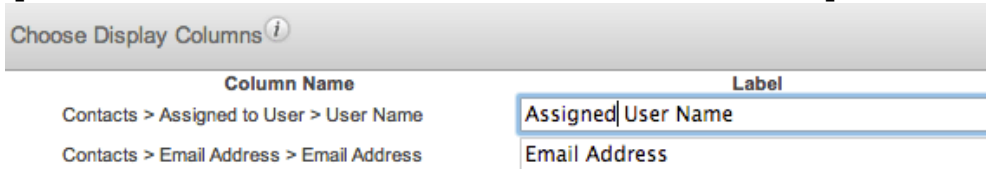
## Report Display Columns

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

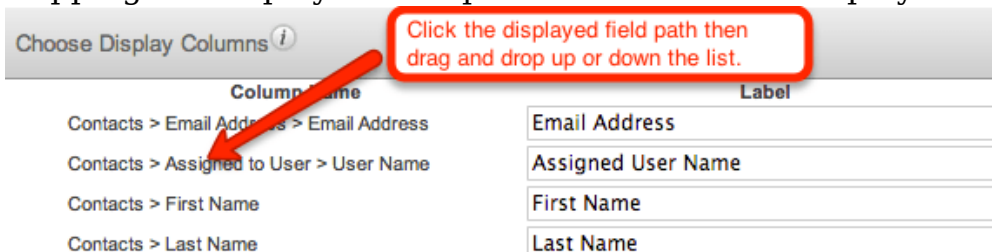
By default, the selected display column fields will display stock labels which can be changed if you desire. To change the label, simply enter the new label name in the open text field then click outside of the text box to preserve the change.



Column Name	Label
Contacts > Assigned to User > User Name	Assigned User Name
Contacts > Email Address > Email Address	Email Address

### 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.



Click the displayed field path then drag and drop up or down the list.

Column Name	Label
Contacts > Email Address > Email Address	Email Address
Contacts > Assigned to User > User Name	Assigned User Name
Contacts > First Name	First Name
Contacts > Last Name	Last Name

### 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.

Column Name	Label	Sort By
Contacts > First Name	First Name	<input type="radio"/>
Contacts > Last Name	Last Name	<input type="radio"/>
Contacts > Email Address > Email Address	Email Address	<input type="radio"/>
Contacts > Assigned to User > User Name	Assigned User Name	<input checked="" type="radio"/> Ascending

## 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.

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:	<input type="checkbox"/>
Assigned to: *	Max Jensen <a href="#">Select</a>
Teams: *	<a href="#">+</a> <a href="#">-</a> <a href="#">Primary</a>
	Global <a href="#">-</a> <a href="#">+</a>
<b>Optional Related Modules:</b> <a href="#">i</a>	<input checked="" type="checkbox"/> Accounts > Assigned to User

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

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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: *	<input type="text" value="Customer Account List"/>
Show Query:	<input type="checkbox"/>
Assigned to: *	<input type="text" value="Max Jensen"/> <a href="#">Select</a>

## 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 you will only be able to view a report according to your team membership, user type, and role restrictions. For more information on teams and roles, please refer to the Team Management and Role Management documentation in the Administration guide.

## 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

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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.

Title: 2013 Accounts Report


Run Report 

Report filters have been modified since last run.

Hide Details

**Name:** 2013 Accounts Report  
**Modules:** Accounts, Accounts > Assigned to User, Accounts > Documents, Accounts > Documer  
**Display Columns:** Name, User Name  
**Schedule:** None  
**Filters:** 

Run-time Filters: 

Accounts > Date Created > Before  03/31/2013 

Apply  Reset

## 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.

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Hide Details

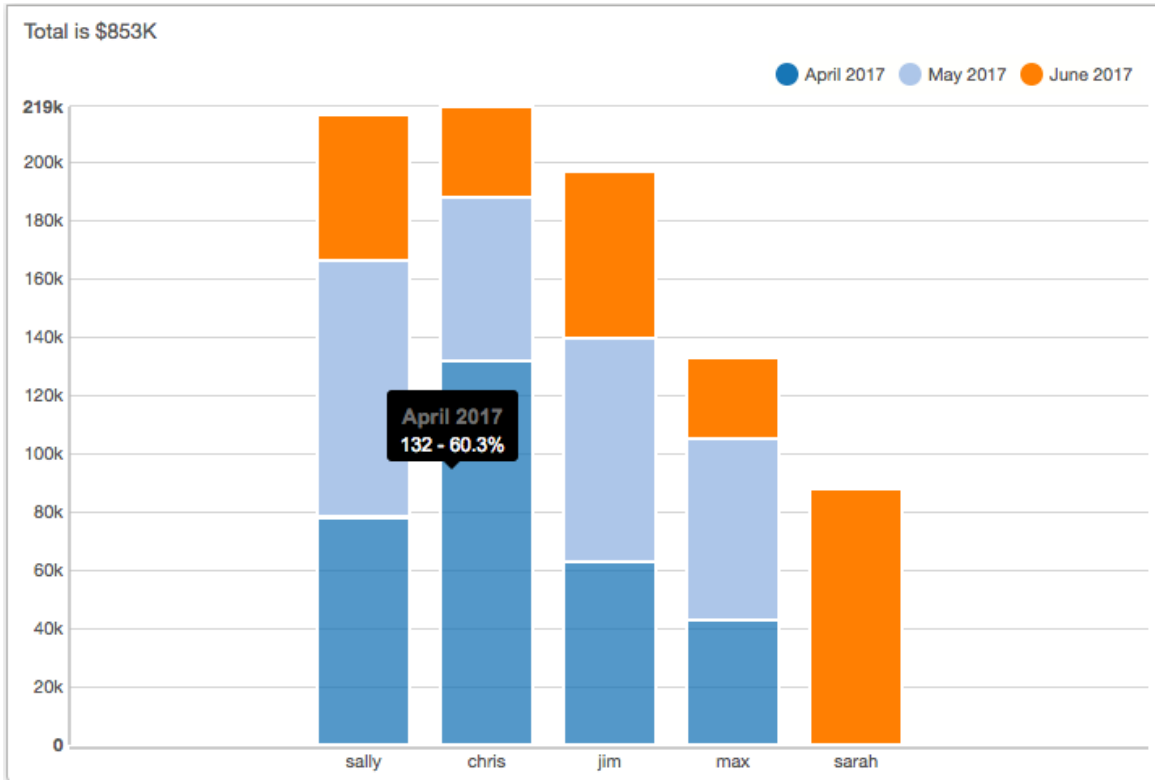
**Name:** Products Reports                      **Type:** Rows and Columns Report  
**Modules:** Products, Products > Account      **Teams:** Global  
**Display Columns:** Product, Cost, Account Name      **Assigned to:** Administrator  
**Schedule:** None  
**Filters:** None

## 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 the chart type (e.g. Vertical Bar, Horizontal Bar) to 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 on 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.

The 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, 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, the chart will display with the currently selected segment highlighted. The current selection will also be indicated in text to the far right of the record count.

The screenshot displays a report interface with two main components: a table of opportunities and a bar chart. The table, titled "Opportunities (11)", has columns for Name, Account Name, Status, and Likely. A drawer is open for the record "Coolview Net Ltd - 145 Units", showing a filtered list of actions: Edit, Follow, and Delete. The bar chart, titled "Opportunities Won by User", shows the total value for each user: chris (\$788K), jim, max, and sally. A red arrow points from the "max" segment in the chart to the "max" user name in the table header.

Name	Account Name	Status	Likely	
Mass Update	LTD - 344 U...	ABC Incorporat...	Closed Won	\$9,511.00
Recalculate Values	Inc - 112 U...	Cumberland Tr...	Closed Won	\$8,531.11
Merge	- 87 Units	Start Over Trust	Closed Won	\$8,341.11
Delete	- 152 Units	Trait Institute Inc	Closed Won	\$7,023.00
Export	- 248 Units	Start Over Trust	Closed Won	\$9,024.44
<input checked="" type="checkbox"/> ☆	Air Safety Inc - 290 Units	Air Safety Inc	Closed Won	\$12,565.56
<input checked="" type="checkbox"/> ☆	Gifted Holdings AG - 202 Units	ABC Incorporat...	Closed Won	
<input type="checkbox"/> ☆	JAB Funds Ltd. - 110 Units	ABC Incorporat...	Closed Won	
<input type="checkbox"/> ☆	Coolview Net Ltd - 145 Units	ABC Incorporat...	Closed Won	
<input type="checkbox"/> ☆	Start Over Trust - 253 Units	Start Over Trust	Closed Won	\$7,128.89
<input type="checkbox"/> ☆	Jones & Sons - 303 Units	ABC Incorporat...	Closed Won	\$9,279.00

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

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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 they want 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 chart type you want the data to be displayed on your report.
  - No Chart : No chart will be generated for the report result.
  - Horizontal Bar : The report data will be displayed in horizontal bars.
  - Vertical Bar : The report data will be displayed in vertical bars.
  - Pie : The report data will be displayed as a pie chart.
  - Funnel : The report data will be displayed as a funnel chart.
  - Line : The report data will be displayed as a line chart.

At least one Group By and one Summary column are requ



The screenshot shows a form with a dropdown menu for 'Chart Type'. The dropdown is open, showing the following options: 'No Chart' (selected with a checkmark), 'Horizontal Bar', 'Vertical Bar', 'Pie', 'Funnel', and 'Line'. The 'Chart Type' label and the dropdown list are highlighted with red boxes. Below the dropdown, there are other form fields: 'Data Series: (i)', 'Description:', and 'Round Numbers Over 100000: (i)'.

- Data Series : Select how you want the chart data to be summarized. The

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field(s) you select in the Choose Display Summaries step will be available to choose in this dropdown list.

At least one Group By and one Summary column are required to render a chart.

Chart Type:	Vertical Bar
Data Series: <i>i</i>	SUM: Likely
Description:	
Round Numbers Over 100000: <i>i</i>	<input checked="" type="checkbox"/>

- Description : Enter a brief description to label the chart if you wish.
- Round Numbers Over 100000 : Check this box if you want numbers over 100,000 to be rounded in the report charts. For example, 150,000 will be displayed as 150K.

## Report Results

The report's detail view will display the report results with relevant data and report chart (if applicable) for all records that meet the specified criteria. Please note that each report type will display the report results differently and users should consider how they would like to view the data prior to creating the report.

### Rows and Columns Report Result

The report results for this report type displays the data in a simple rows and columns format. The display column field values for all records that meet the specified criteria will appear on the report result. You can record's details by clicking the record name. You can also sort the report results by a display column in either ascending or descending order. To sort by a field or switch the sort direction, click the column header noting that the fields which allow sorting will have a pair of arrows. Please note that the report may be sorted by only one column at a time. To view an example Rows and Columns report result, please refer to the creating Rows and Columns Report section.

Subject	Status	Date Created	User Name
Discuss review process	Scheduled	04/10/2017 16:43	chris

### 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

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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
<a href="#">Spindle Broadcast Corp.</a>	01/30/2016	\$50,950.00	Closed Won
<a href="#">Chandler Logistics Inc</a>	01/27/2016	\$51,683.00	Closed Won
<a href="#">Complete Holding</a>	01/29/2016	\$36,522.00	Closed Won
<a href="#">Cumberland Trails Inc</a>	01/29/2016	\$41,645.56	Closed Won
<a href="#">Tortoise Corp</a>	01/29/2016	\$27,472.00	Closed Won

Month: Expected Close Date = February 2016, SUM: Likely = \$201,649.55			
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## 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
<b>Grand Total</b>	\$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.

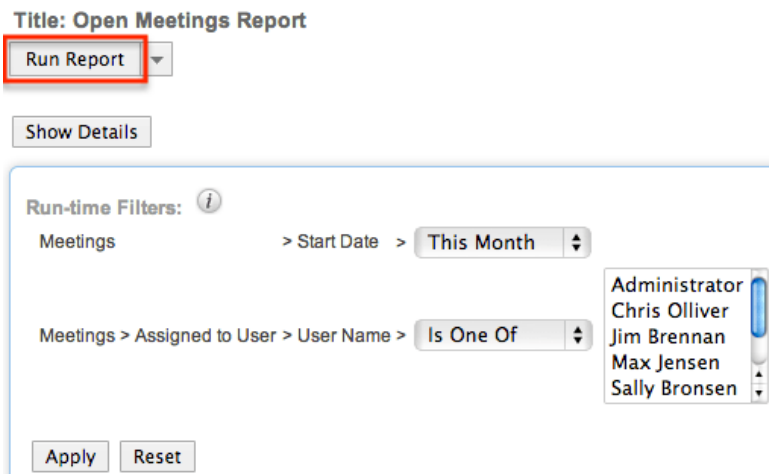
When the user does not have this option selected, reports will display all currency values in the system's default currency. To keep amounts historically accurate, the conversion rate will only update on on currency fields when the business is still open and under the following scenarios:

- 
- 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 update or add information to the report. There are various methods of editing the report from the Reports detail view and Reports list view. Regardless of where you initiate the edit from, you will always go through the Report Wizard to make the necessary changes to your report. You can edit the report by going through the Report Wizard step-by-step by clicking the

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Back and Next button or clicking the link (e.g. Define Filters, Choose Display Columns, Choose Display Summaries) at the top of the Report Wizard to edit a specific step. Once the changes are complete, click "Save and Run" to preserve the changes made and generate the report.

### Report Wizard

Rows and Columns Report [Select Module](#) > [Define Filters](#) > [Choose Display Columns](#) > [Report Details](#)

[< Back](#) [Next >](#) [Save](#) [Preview](#) [Save and Run](#) [Cancel](#)

Related Modules <i>i</i>	Define Filters <i>i</i>
<ul style="list-style-type: none"><li>Accounts</li><li>Assigned to User</li></ul>	Select Operator: <input type="text" value="OR"/>

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.

Calls By Team By User ☆

Title: Calls By Team By User

Run Report
Share
Edit
Copy

### 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.



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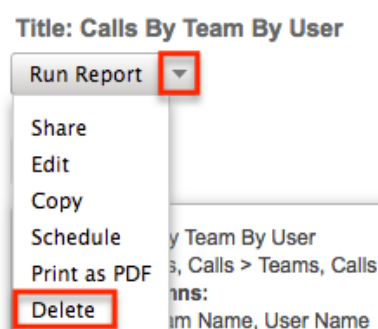
Please note that your ability to delete reports in Sugar may be restricted by a role. For more information on roles, please refer to the Role Management documentation in the Administration guide. Check with your system administrator if you do not see the Delete options.

## 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.

Calls By Team By User ☆



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

## Exporting Reports

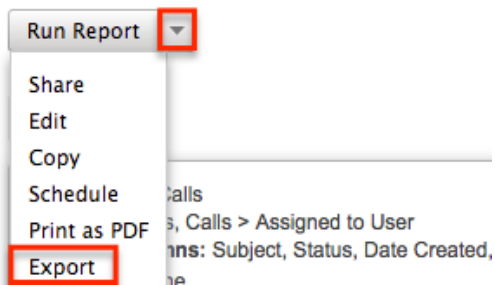
Sugar's Export option allows users to download the data in reports as a .CSV (comma-separated values) file. Please note that only Rows and Columns-type reports have the ability to be exported. For more information on exporting records in Sugar, please refer to the Export documentation. This may be useful when needing to use the report data with other software such as Microsoft Excel or to update existing records by creating a report (including Record ID's), exporting, making changes, then importing the altered data back into Sugar. For more information on updating existing records via import, please refer to the Import documentation. Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a report with a large amount of data. If you encounter an error when performing this action, we recommend breaking up the report in smaller batches.



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## Open Calls ☆

Title: Open Calls



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.

## Printing Reports as PDFs

Sugar's Print as PDF option in the Reports module allows users to download the reports to PDF files and save on their local machine. This may be useful when needing to email the file to other members of the team to share the report data or to keep track of key historical data from the system. You can also view charts on the downloaded PDF files for Report types (e.g. Summation Report with Details, Summation Report, Matrix Report) with chart options.

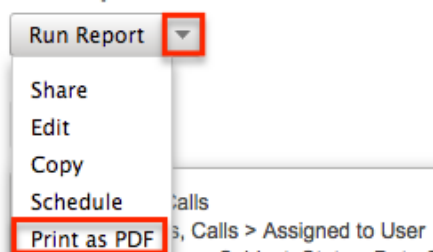
Please note that your ability to print PDF reports from Sugar may be restricted by a role preventing export of data. For more information on roles, please refer to the

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.

## Open Calls ☆

Title: Open Calls



- 
3. Open the downloaded PDF file to view the report and save to your local machine if you wish.

## Scheduling Reports

Reports in Sugar can be scheduled to be emailed to users periodically based on specified date and time intervals. Please note that each individual user has to schedule the report in their Sugar account in order for the reports to be delivered to them. Sugar will run the report at the specified interval based on the set time zone in user preferences and sends it as a PDF file to your email address on file. Please note that the outbound mail server for the system as well as the user's email settings must be configured properly in order for the reports to be delivered successfully. For more information on setting up the system email settings, please refer to the Email documentation in the Administration guide. For more information on setting up your user preferences' email settings, please refer to the

The Run Report Generation Scheduled Tasks scheduler in Sugar processes all scheduled reports to be delivered to the user at the scheduled interval. By default, the report scheduler is set as "Inactive" for new Sugar installations. Administrators must check to make sure that the Run Report Generation Scheduled Tasks scheduler is active and the settings (e.g. interval) are configured properly. For example, if the scheduler is set to trigger once per day and a user schedules a report to be delivered every hour, the report will only be delivered once each day due to the set interval in the scheduler. The administrator must change the interval for the scheduler to run every 1 hour in order for the users report to be processed and delivered per their scheduled interval. For more information on configuring schedulers, please refer to the Schedulers section of the System documentation.

## Scheduling via Detail View

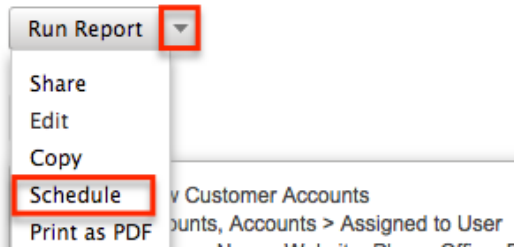
Use the following steps to schedule the report via the detail view:

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

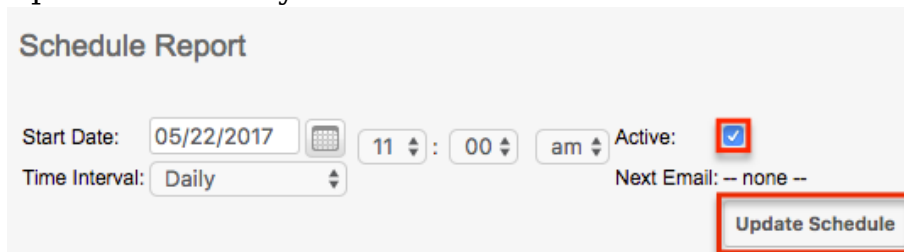


## My New Customer Accounts

Title: My New Customer Accounts



3. Enter the start date and time then select the time interval for report delivery. Check the Active box then click "Update Schedule" to schedule your report. Note: You must mark the Active checkbox in order to enable the scheduled report for delivery.



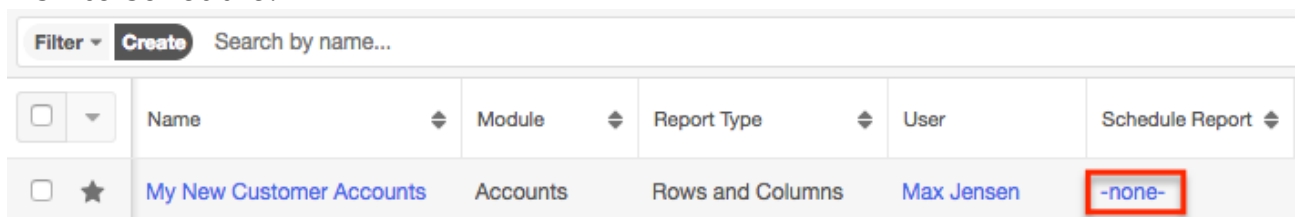
Once the report is scheduled successfully, the date and time for the scheduled report will appear in the list view's Schedule Report column for the specific report. If you do not see the scheduled date and time appear in the list view, then check your scheduled report again to make sure it was set up properly.

Name	Module	Report Type	User	Schedule Report
My New Customer Accounts	Accounts	Rows and Columns	Max Jensen	05/22/2017 11:00 am

## Scheduling via List View

Use the following steps to schedule the report via the list view:

1. Navigate to the Reports list view by clicking the Reports module tab.
2. Use the List View Search to find the report(s) you wish to schedule.
3. Click the "-none-" link under the Schedule Report column for the report you wish to schedule.



Name	Module	Report Type	User	Schedule Report
My New Customer Accounts	Accounts	Rows and Columns	Max Jensen	-none-

- 
4. Enter the start date and time then select the time interval for report delivery. Check the Active box then click "Update Schedule" to schedule your report. Note: You must mark the Active checkbox in order to enable the scheduled report for delivery.

**Schedule Report**

Start Date: 05/22/2017  Active:

Time Interval: Daily Next Email: -- none --

11 : 00 am

**Update Schedule**

Once the report is scheduled successfully, the date and time for the scheduled report will appear in the list view's Schedule Report column for the specific report. If you do not see the scheduled date and time appear in the list view, then check your scheduled report again to make sure it was set up properly.

Name	Module	Report Type	User	Schedule Report
My New Customer Accounts	Accounts	Rows and Columns	Max Jensen	05/22/2017 11:00 am

## 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.

2013 Accounts Report 

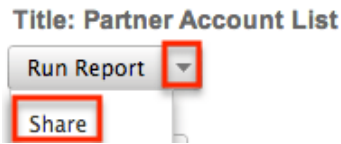
Title: 2013 Accounts Report

Run Report

## Sharing Reports

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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".

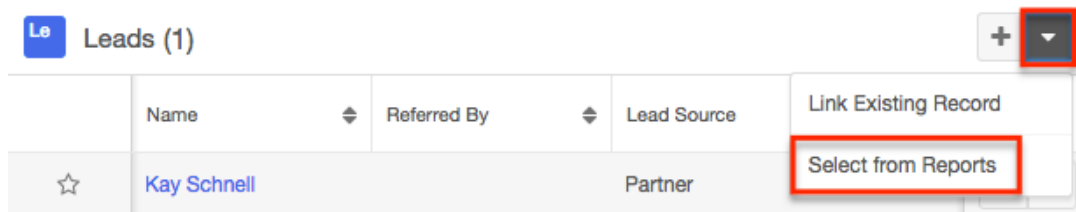


Users can simply click the link in the email to access the report in Sugar. Please note that the user must be logged into Sugar in order to access the record, and its visibility will depend upon their team membership, user access type, and assigned roles. For more information on teams and roles, please 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 your target list, you can create a report based on the Leads module filtered by the Primary Address State field (e.g. CA). Once the report is created and saved, 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 then 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 result 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



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to a target list, you will need to create the reports in several batches.

Last Modified: 2018-04-02 21:27:27

## 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:

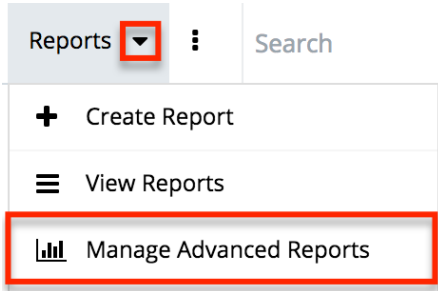
- **Custom Queries** : Custom query records contain the SQL statement used to pull information from the database.
- **Data Formats** : Data format records describe how to format and display the results of the related custom query. Data formats may also be interrelated to create child/parent combinations 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. Data formats and the advanced report structure may be created and manipulated by non-admin users according to their team access, but they will be unable to link these to the custom queries. 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.

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## 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.

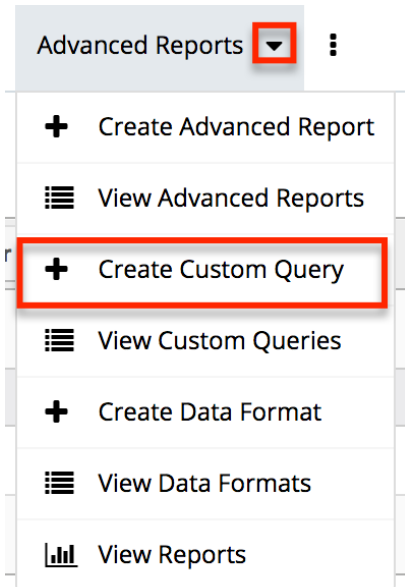
Field	Description
Custom Query	The SQL select statement which will retrieve information from the database
Description	A description or other information about the custom query
Lock Query	Option to toggle editability of the Custom Query field
Query Name	The name of the custom query
Teams	The Sugar team(s) 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".

**Custom Query:**

**Save** (highlighted with a red box)

---

Query Name: \* Opportunity Query 1

Lock Query:

Team:   Primary

Description: Opportunities by Type

Custom Query: (  
SELECT  
'New Business' "Opportunity Type",

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

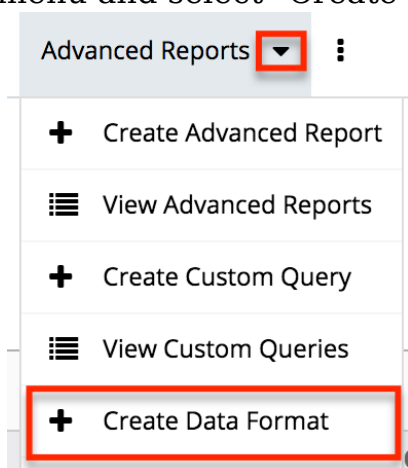
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Teams	The Sugar team(s) assigned to the data format record
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## Creating Data Format Records

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".



## Create

**Save** Cancel

Data Format Name:	<input type="text" value="Opportunity Data Set 1"/>	Report Name:	
Query Name: *	<input type="text" value="Opportunity Query 1"/> ↕ ✕	Sub/Child Query:	None
Parent Data Format:	<input type="text"/> ↕ ✕	Teams: *	<input type="text" value="Global"/> + Primary
Description:	<input type="text"/>	Font Size:	Smaller (-5) ▾
Table Width %:	<input type="text" value="100"/> Percent (%) ▾	Header Text Color:	Default ▾
Exportable (CSV File Only):	<input type="checkbox"/>	Body Text Color:	Default ▾
Show Header:	<input type="checkbox"/>	Header Background Color:	Default ▾
Combine with previous Data Format:	<input type="checkbox"/>	Body Background Color:	Default ▾
Group with Previous Header:	<input type="checkbox"/>		

## Advanced Report Fields

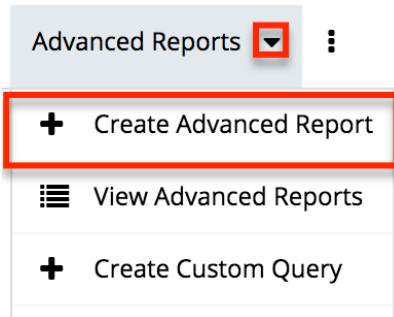
The Advanced Reports module contains a number of stock fields which come out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

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".

Create

## 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

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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

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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

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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.

**Activities Query - 1 Month - Sally Bronsen**

Export		
activity_type	Contact Name	Account Name
Call	Britt Jefferson	Sea Region Inc
Meeting	Britt Jefferson	Sea Region Inc

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".

Layout Type:       Modify Header Attributes:

Default Value:       Modify Body Attributes:

Hide Column in Report:

**Add/Edit Header Attributes:**

Header Background Color:       Wrap Text:

Header Text Color:       Font Style:

Font Size:

Display Type:       Display Name:

Format Type:

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".

Export		
Sally Bronsen's Activities	Contact Name	Account Name
Call	Britt Jefferson	Sea Region Inc
Meeting	Britt Jefferson	Sea Region Inc

## Formatting a Column's Body

Once you have created a data format record including choosing a custom query

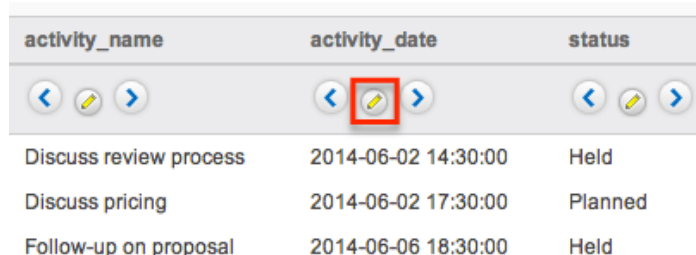
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record which will return at least one row of data, a table will be displayed at the bottom of the data format record's detail view. The following options are available for formatting a particular column's data cells:

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.



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. 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".



Layout Type:       Modify Header Attributes:

Default Value:       Modify Body Attributes:

Hide Column in Report:

---

**Add/Edit Body Attributes:**

Body Background Color:       Wrap Text:

Body Text Color:       Font Style:

Font Size:       Table Width %:

Format Type:

After closing the pop-up window, the table will refresh to show the changes you made to the column. For our example, the column of database datetime values will now be displayed as simple date values.

activity_name	activity_date	status
Discuss review process	06/02/2014	Held
Discuss pricing	06/02/2014	Planned
Follow-up on proposal	06/06/2014	Held

## Hiding Columns

If an individual column should not be displayed in a report's output, the column may be marked as hidden on the data format record. This will prevent it from being displayed when running an advanced report which includes the data format.

Use the following steps to hide a column from a report's output:

1. Navigate to the detail view of a data format record 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".

Layout Type:     Modify Header Attributes:

Default Value: activity\_date    Modify Body Attributes:

Hide Column in Report:

## 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 Activities	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

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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.

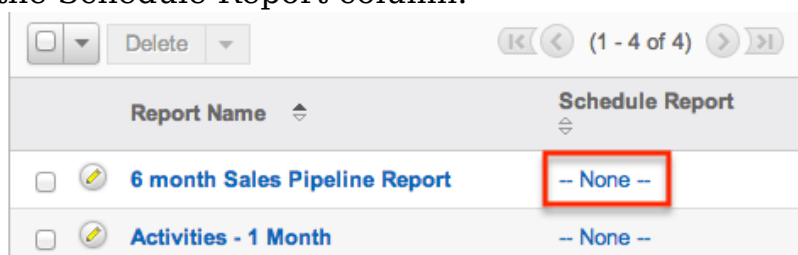
The outbound mail server for the system as well as the user's email settings must be configured properly in order for the reports to be delivered successfully. For more information on setting up the system email settings, please refer to the Email



The Run Report Generation Scheduled Tasks scheduler in Sugar processes all scheduled advanced reports to be delivered to the user at the scheduled interval. By default, this report scheduler is set as "Inactive" for new Sugar installations. Administrators must check to make sure that the Run Report Generation Scheduled Tasks scheduler is active and the settings (e.g. interval) are configured properly. For example, if the scheduler is set to trigger once per day and a user schedules a report to be delivered every hour, the report will only be delivered once each day due to the set interval in the scheduler. The administrator must change the interval for the scheduler to run every 1 hour in order for the user's report to be processed and delivered per their scheduled interval. For more information on configuring schedulers, please refer to the Schedulers section of the System documentation.

## Scheduling Via List View

Use the following steps to schedule an advanced report via the list view:

1. Navigate to the Advanced Reports list view.
2. Click "-- None --" in the Schedule Report column of the report you wish to schedule. If you wish to update an existing schedule, click the date shown in the Schedule Report column.



Report Name	Schedule Report
<input type="checkbox"/>  6 month Sales Pipeline Report	-- None --
<input type="checkbox"/>  Activities - 1 Month	-- None --

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.
  - o Please note that you must mark the Active box in order to activate the report schedule.

**Schedule Report**

Start Date: 06/16/2014  09 : 00 am Active:

Time Interval: Weekly Next Email: 06/16/2014 09:00am

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.

Report Name	Schedule Report
<input type="checkbox"/> <input type="checkbox"/> 6 month Sales Pipeline Report	06/16/2014 09:00am

## 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)".

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## 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)".

Last Modified: 2018-06-08 17:57:17

## 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.

### Viewing Stock Reports

All of Sugar's stock reports can be accessed via the Reports module. 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.

### 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

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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 Module

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.

In addition to the following stock reports, users can create their own reports. For more information on creating reports, please refer to the Reports documentation.

## Account Reports

Name	Type	Description
Accounts By Type By Industry	Summation	Shows the total count of all accounts for each industry grouped by account type
Customer Account List	Rows and Columns	Lists accounts where the type is "Customer"
Customer Account Owners	Summation	Lists accounts that are assigned to the user specified in the report's run-time filter
My New Customer Accounts	Rows and Columns	Lists accounts assigned to the current user where the type is "Customer" and the date created is in the time period specified in the run-time filter
Partner Account List	Rows and Columns	Lists accounts where the type is "Partner"

## Call Reports

Name	Type	Description
Calls By Team By User	Summation	Shows the total count of all calls for each user grouped by primary team
Open Calls	Rows and Columns	Lists calls where the status does not equal "Held" and the start date occurred in the last 7 days for the user specified in the run-time filter

## Case Reports

Name	Type	Description
Open Cases By Month By User	Summation with Details	Shows the count of all cases with an open status (e.g. New, Assigned, etc.) for each user grouped by when the case was created
Open Cases By Priority By User	Summation with Details	Shows the count of all cases with an open status (e.g. New, Assigned, etc.) for each case priority grouped by assigned user
Open Cases By User By Status	Summation with Details	Shows the count of all cases with an open status (e.g. New, Assigned, etc.) grouped by assigned user
New Cases By Month	Summation	Shows a summary of cases that have a status of "New" grouped by the month when the case was created

## Contact Reports

Name	Type	Description
Call List By Last Date Contacted	Rows and Columns	Lists the names, phone numbers, and related account name of contacts

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		who are not marked "Do Not Call"
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## Lead Reports

Name	Type	Description
Leads By Lead Source	Summation	Shows the total number of leads grouped by each lead source

## Meeting Reports

Name	Type	Description
Meetings By Team By User	Summation	Shows the total count of all meetings for each user grouped by primary team
Open Meetings	Rows and Columns	Lists meetings where the status does not equal "Held" and the start date occurred in the last 7 days for the user specified in the run-time filter

## Opportunity Reports

Name	Type	Description
All Closed Opportunities	Rows and Columns	Lists opportunities with a sales stage that is either "Closed Won" or "Closed Lost"
All Open Opportunities	Rows and Columns	Lists opportunities with a sales stage that is neither "Closed Won" nor "Closed Lost"
Current Quarter Forecast	Rows and Columns	Lists opportunities with an expected close date in the current quarter
Detailed Forecast	Rows and Columns	Lists all opportunities in Sugar



Opportunities By Lead Source	Summation with Details	Shows the total number of opportunities grouped by each lead source
Opportunities By Sales Stage	Summation with Details	Shows the average and total amount of all opportunities grouped by sales stage
Opportunities By Type	Summation with Details	Shows the average and total amount of opportunities for each sales stage grouped by opportunity type
Opportunities Won By Account	Summation with Details	Lists opportunities, grouped by account name, where the sales stage is "Closed Won"
Opportunities Won By Lead Source	Summation	Displays a horizontal bar chart representing the total amount of opportunities with a sales stage of "Closed Won" for each lead source
Opportunities Won By User	Summation with Details	Shows all opportunities with a sales stage of "Closed Won" grouped by each Sugar user
Pipeline By Team By User	Summation	Displays a horizontal bar chart, grouped by primary team, representing the sum of all opportunities with a sales stage that is neither "Closed Won" nor "Closed Lost" for each Sugar user
Pipeline By Type By Team	Summation	Displays a horizontal bar chart, grouped by primary team, representing the sum of all opportunities with a sales stage that is neither "Closed Won" nor "Closed Lost" for each opportunity type

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## Task Reports

Name	Type	Description
Open Tasks	Rows and Columns	Lists tasks with an open status (e.g. "Not Started", "In Progress", etc.) created in the last 7 days for the user specified in the run-time filter
Tasks By Team By User	Summation	Shows the total count of all tasks for each user grouped by primary team

## Tracker Reports

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 descriptions of each stock tracker report.

## 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.

Note: Customers with instances hosted on Sugar's cloud service do not have direct access to the database and, therefore, cannot restore stock reports once they have been deleted. A support-authorized contact for your organization can file a case with the Sugar Support team for assistance in trying to restore the report that has been deleted from your Sugar instance.

Last Modified: 2018-06-29 14:43:12

## Processes

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## Overview

Sugar's Processes module is the user-facing portal to Sugar's Advanced Workflow

Sugar's Advanced Workflow empowers Sugar administrators to automate vital business processes for their organization. Some examples of business processes that can be automated using Sugar's Advanced Workflow 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 Advanced Workflow documentation in the Administration Guide.

Note: Sugar's Advanced Workflow is exclusive to Enterprise and Ultimate editions of Sugar 7.6.x and later.

## 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
<a href="#">Searching for Processes</a> <a href="#">List View Search</a> <a href="#">Creating a Filter</a> <a href="#">Saving a Filter</a>	The Searching for Records section provides an introduction to list view search, which searches and filters within the Processes module.
<a href="#">Processes List View</a> <a href="#">Total Record Count</a> <a href="#">List View Search</a> <a href="#">Column Reordering</a> <a href="#">Column Resizing</a> <a href="#">Column Sorting</a> <a href="#">Column Selection</a> <a href="#">More Processes</a> <a href="#">Dashboards</a>	The List View section walks through the many elements of the Processes List View layout, which contains a list of all running processes that require action (e.g. approve, reject, etc.) from the logged-in user. Unlike other Sidecar modules, you will only see processes in the list view if there is anything requiring your approval or review. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the Processes list view are described in the List View Record Actions Menu section of this page.
<a href="#">Processes Record View</a> <a href="#">Favorite Designation</a> <a href="#">Following Designation</a>	The Process record view displays the Sugar record that is awaiting action in full detail including its module name,

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Next or Previous Record  
Actions Menu  
Show More  
Subpanels  
Related Record Subpanels  
Filtering Subpanels  
Reordering Subpanels  
Activity Stream  
Dashboards

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.

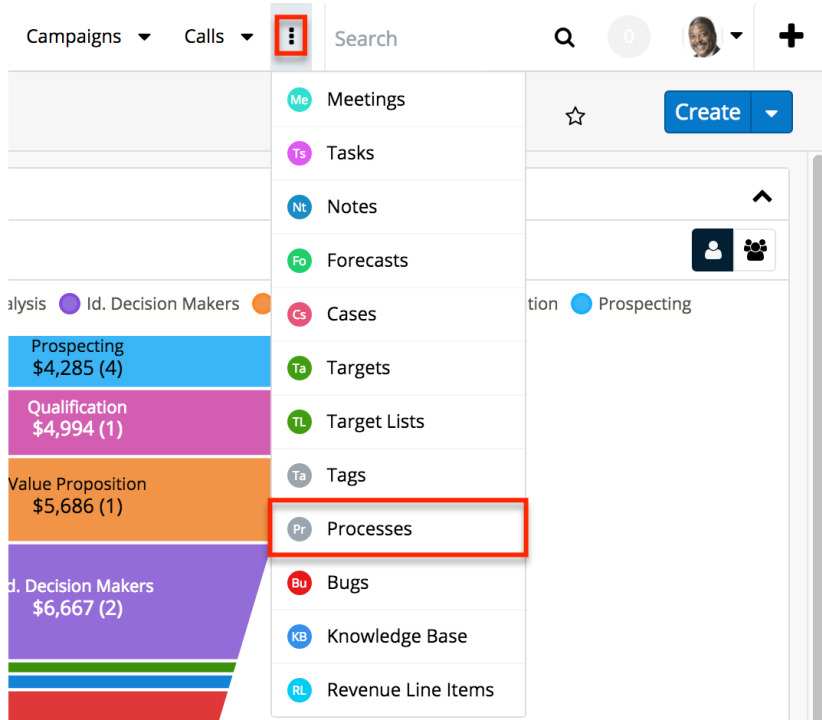
## Process Menus

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.

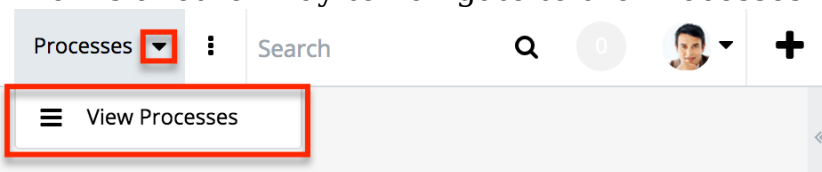
## Module Tab Menu

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 Advanced Workflow documentation in the Administration Guide.

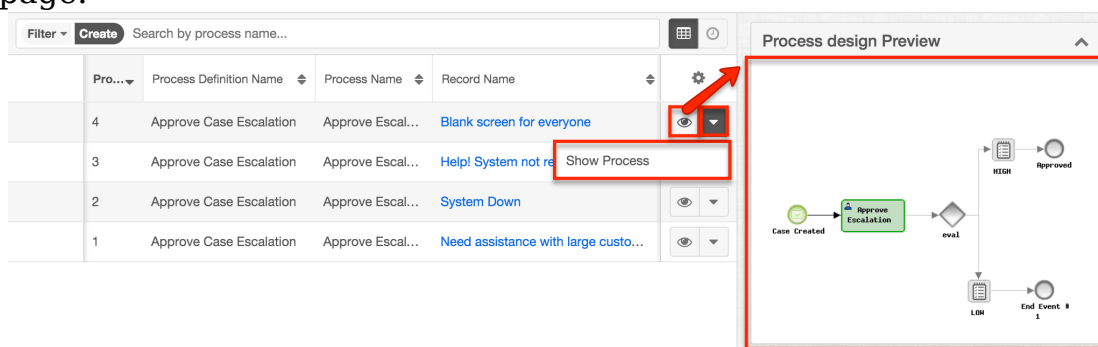
If you do not see the Processes module tab in Sugar, please check the following:

- 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

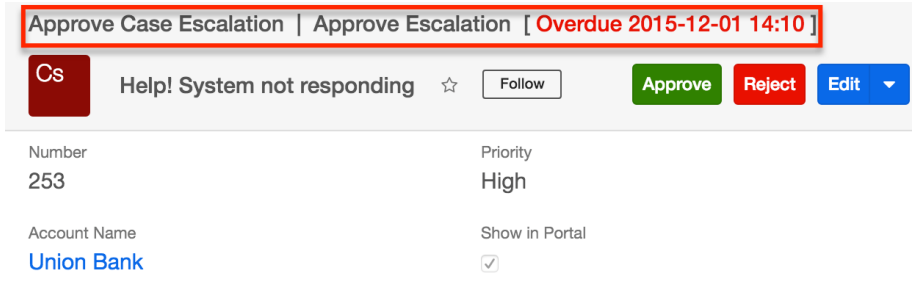
The Process record view displays the Sugar record that is awaiting action in full detail including its module name, fields, process buttons, and subpanels of related records. To access a process' record view, click on the process name in the Processes dashlet or select "Show Process" from the process 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 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 Advanced Workflow 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.

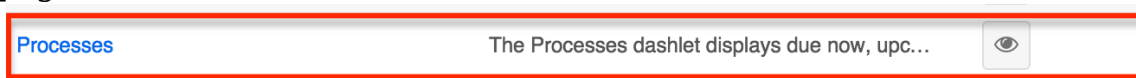
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## Viewing Via Dashlet

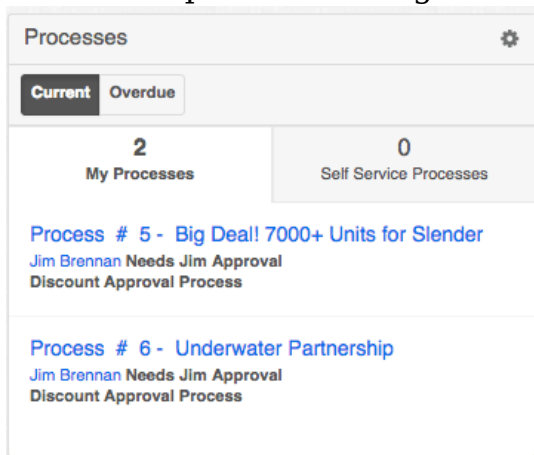
All users who may be engaged in a process should place the Processes dashlet on their home screens. Process users will not receive an email notification when an activity is ready for them (unless the administrator has explicitly configured this within the process definition). The dashlet makes it easy for users to know when it is their turn to participate in a process and to take the appropriate action.

Note: Users (including administrators) will see only the processes that immediately require their attention in the Processes dashlet.

To add the Processes dashlet, please refer to the Adding Dashlets section of the Intelligence Pane documentation, choosing "Processes" from the Add a Dashlet page.



After saving the dashlet and its containing dashboard, the dashlet will offer several Processes-specific filtering tools:



- **Current** : Click on this button to view processes that are running within the expected timeframe.
- **Overdue** : Click on this button to view processes that have a due date in the past. The label "Overdue" and the due date will be displayed adjacent to the Process description.
- **My Processes** : Enable this tab to view only the running processes upon which the logged-in user must act. To execute the Process, click on the name of the process. Please note that admin users can not see processes running for other users via the dashlet. To access the system's exhaustive list of running and completed processes, please refer to the Process Management section of the Administration Guide.
- **Self Service Processes** : Enable this tab to view only the running processes in the queue to be claimed by a user. Self-Service processes are configured

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- 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.

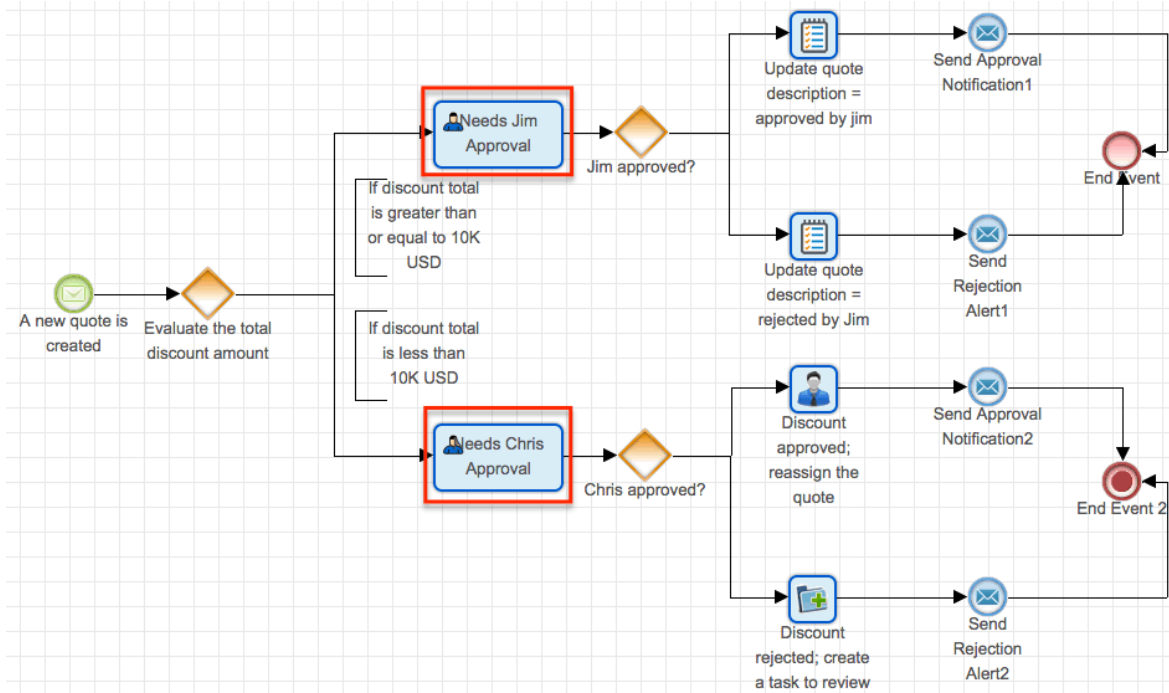
## Executing Processes

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.

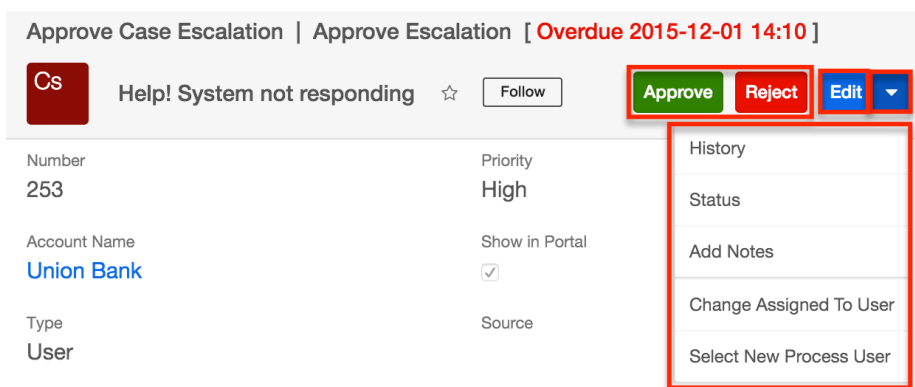
As an example, an organization may require a different manager's approval depending on the discount total. The following image portrays how a Sugar process could automate this approval:



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:

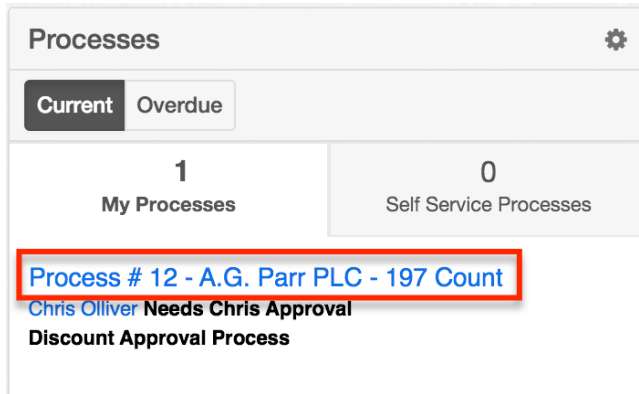
Menu Item	Description
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Approve	Allow the process to continue to the next step along the approval path
Reject	Allow the process to continue to the next step along the rejection path
Edit	Edit the fields on the record to be approved
History	Display the 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.

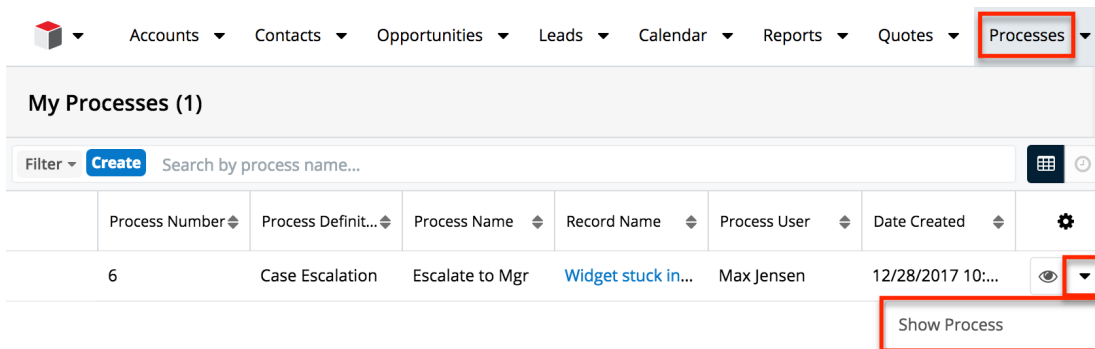
## Executing an Approval Process

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.



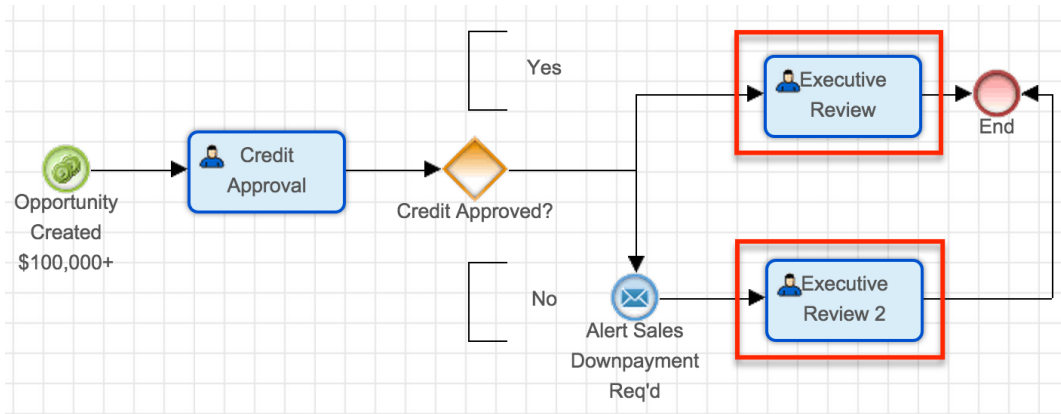
Alternatively, navigate to Processes list view and choose "Show Process" from the Actions menu of the record:



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.

High Value CREDIT CHECK | Set Credit Score [ Due Date 2015-12-16 18:13 ]

**Op** Powell Funding - 358 Units ☆ Follow **Route** **Edit** ▾

Account Name: Powell Funding  
 Expected Close Date: 2015-12-19

Likely: \$22,912.00  
 Best: \$30,000.00  
 Worst: \$11,456.00

History  
 Status  
 Add Notes  
 Change Assigned To User  
 Select New Process User

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

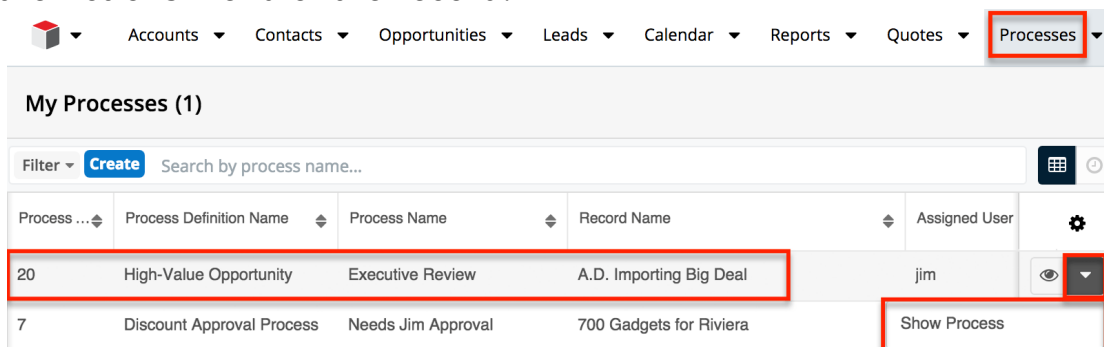
Follow these steps to execute a process that has been routed to you:

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.

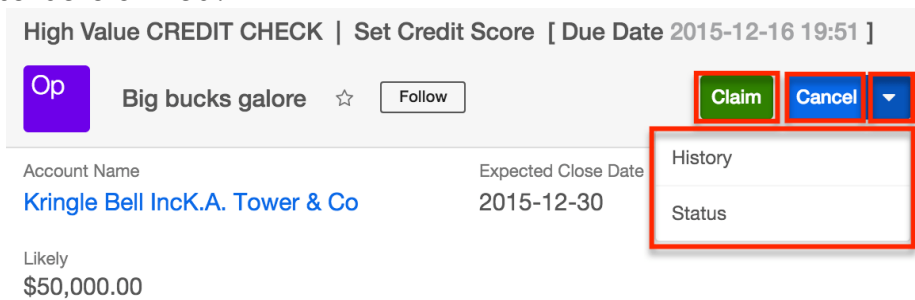
4. When you have completed making edits and reviewing the record, click "Route" to complete the process. This will redirect you to your dashboard, where the executed process will no longer be visible in your Processes dashlet.

## 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:

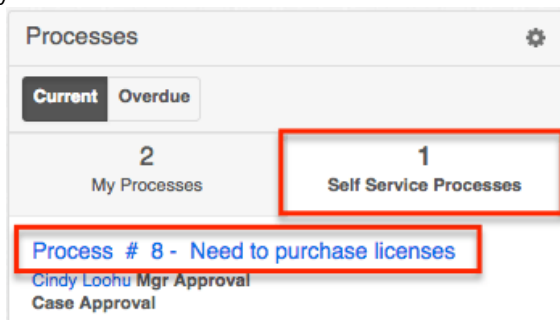
Menu Item	Description
Claim	Volunteer to execute this process and remove it from view of other team members. The process can be immediately executed after claiming it, or you can navigate away and find the process later in the My Processes tab of your Processes dashlet.

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

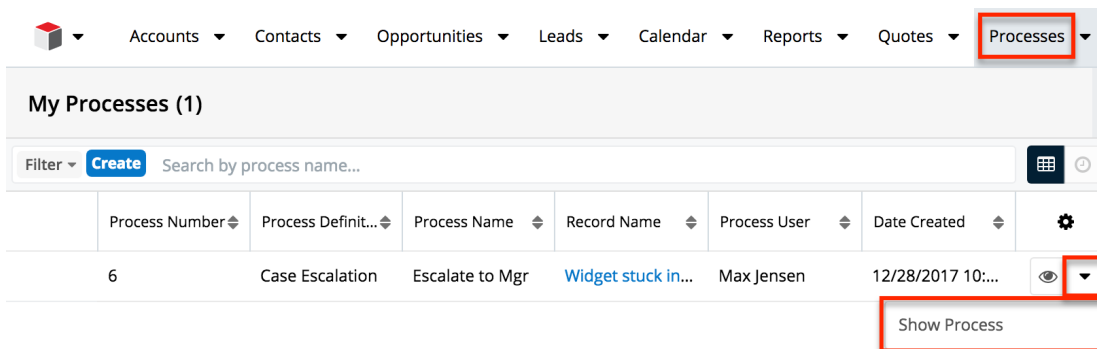
### Claiming a Self-Service Process

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

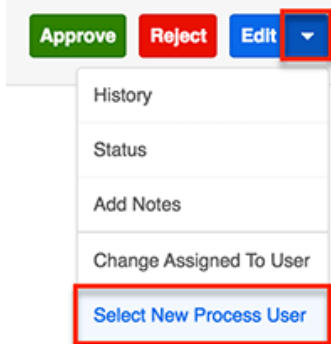
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page will reload and expose the Approve/Reject or Route buttons, depending on what type of process activity has been configured. The process can be immediately executed after claiming it, or you can navigate away and find the process later in the My 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.

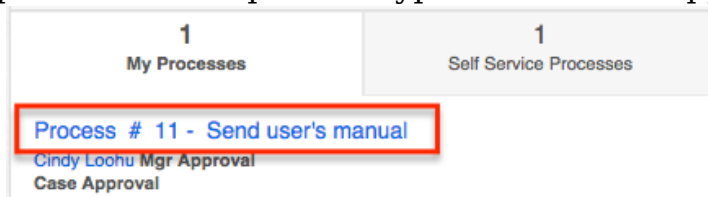
## Choosing a New Process User

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:



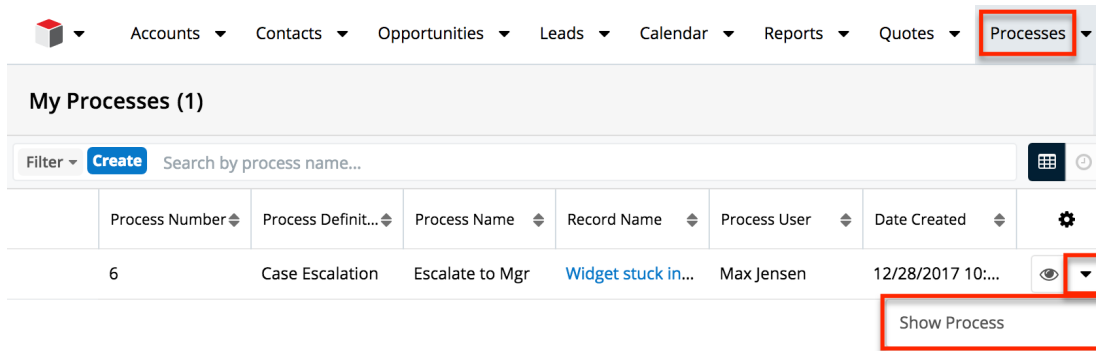
Follow these steps to reassign a process:

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.

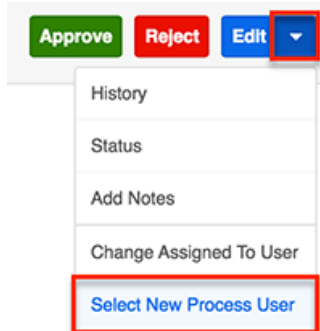


Alternatively, navigate to Processes list view and choose "Show Process" from the Actions menu of the record:



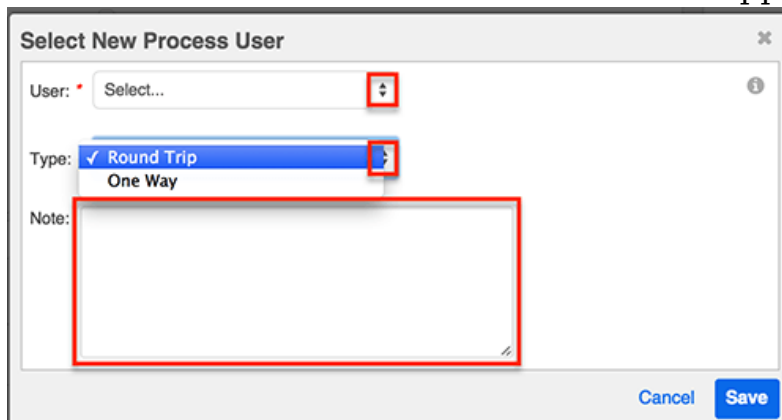


2. The process landing page is the record view of the affected Sugar record.  
Note: Legacy user-interface modules will display the record's edit view.
3. Click on the triangle next to the Edit button to reveal the Actions menu. Click on "Select New Process User".



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

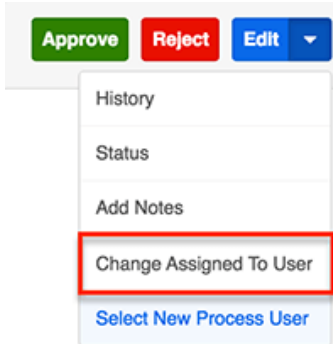
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you.

- 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:



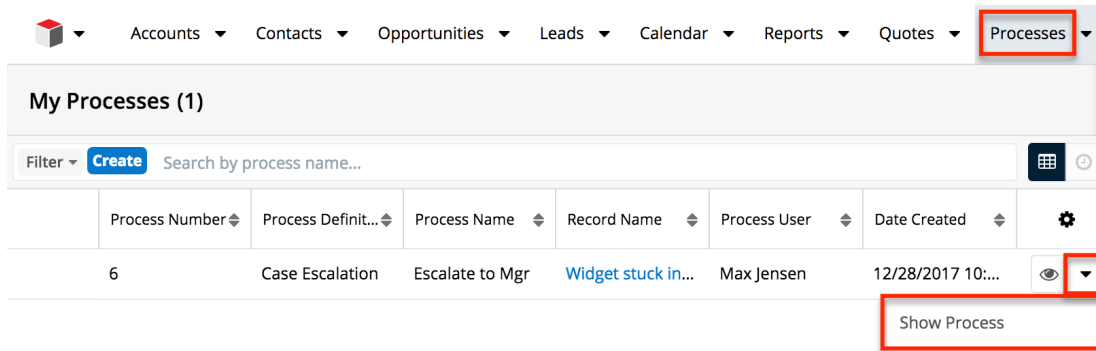
Follow these steps to designate a new assigned user:

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.

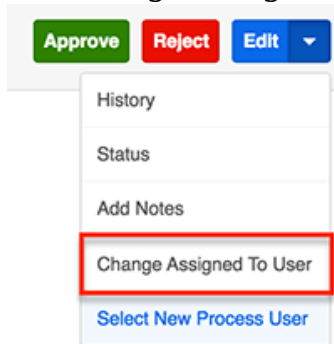


Alternatively, navigate to Processes list view and choose "Show Process" from the Actions menu of the record:



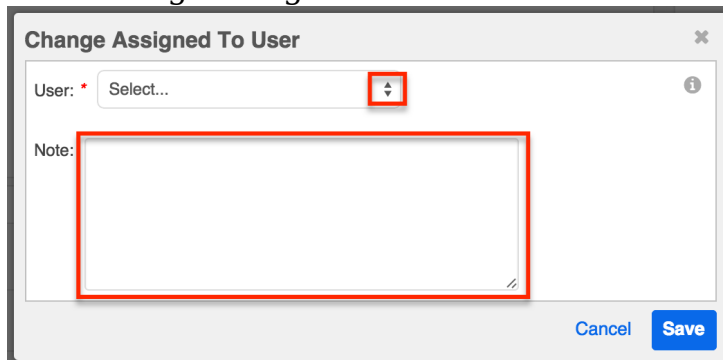


2. The process landing page is the record view of the affected Sugar record.  
Note: Legacy user-interface modules will display the record's edit view.
3. Click on the triangle next to the Edit button to reveal the Actions menu. Click on "Change Assigned To User".



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".

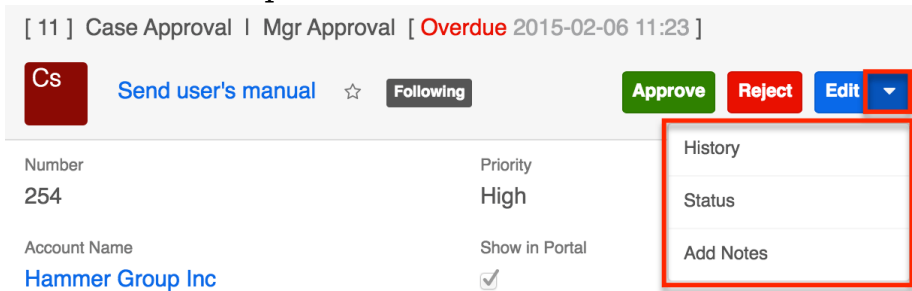
5. Click on "Save" to update the Sugar record. The page will reload to reflect the change. You can now execute the process as explained in either the Executing



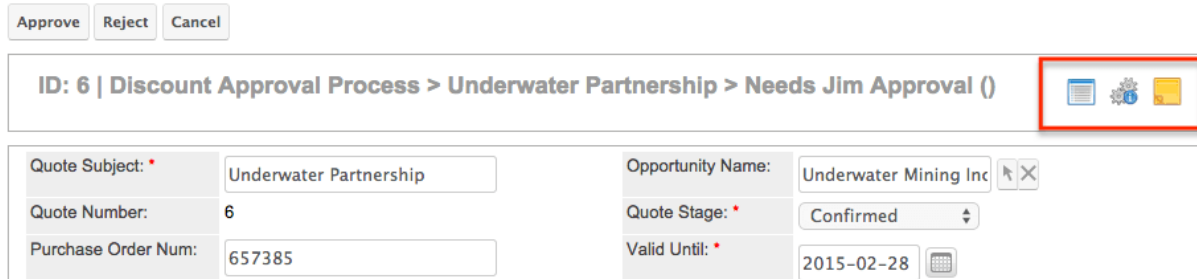
Approval Processes or Executing Routed Processes sections of this page.

## 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: Show 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 Advanced Workflow 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.
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## 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 an Advanced Workflow administrator.


**# 17: Process History** ✕



**Chris Olliver** has created Process #17 on the Opportunity record with the event 'A new quote is created'. ( 3 days ago ) ✓  
2015-12-18 17:43



**Process Author** has been assigned to continue the task. ( 3 days ago ) ✓  
2015-12-18 17:43






**Chris Olliver** currently has Process #17 'Needs Chris Approval' The task is still assigned. (not yet started)  
2015-12-18 17:43

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 "Show History". In legacy user-interface modules, click on the Show History icon in the corner of the screen. 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 Advanced Workflow engine.

**# 17: Process History**

-  **Chris Olliver** has created Process #17 on the Opportunity record with quote is created'. ( 3 days ago )
-  **Process Author** has been assigned to continue the task. ( 3 days ago )
-  **Chris Olliver** currently has Process #17 'Needs Chris Approval' on the Opportunity record (task has been created). The action performed was: **[REJECTED]**. ( a few seconds ago )

- Explanation of the transition that occurred:

 **Chris Olliver** has been assigned Process #17 'Needs Chris Approval' on the Opportunity record (task has been created). The action performed was: **[REJECTED]**. ( a few seconds ago )

- Transition status indicator (checkmark):

w quote is created'. ( 3 days ago )	<input checked="" type="checkbox"/>
( 3 days ago )	<input checked="" type="checkbox"/>
ity record (task has been (not yet started)	<input type="checkbox"/>

- Checkmark  : The action has been executed.
- No Checkmark  : The action has not yet been executed. A popup window will appear over the current page outlining the transition history of the current process.

3. Click on the X in the corner of the window to return to the process record view.


## Viewing Process Notes

A process user who is engaged in a process activity can add notes for people who will engage with the process later in its flow. When a different user engages in that same process later, he can see the earlier user notes and choose to add his own. Users who executed process activities at the beginning will not see the notes added by subsequent process users unless the process is routed back to them for review or approval later.

Note: Admin users can see all notes and add notes to any running process at any time from the Process Management page.

To create a note and view process notes from other users, follow these steps:

1. From the Processes dashlet, click on the hyperlinked process name to view the process record view.

- 
2. Click on the triangle next to the Edit button to reveal the Actions menu, and then click "Show Notes".  
Note: In legacy user-interface modules, click on the Notes  icon in the corner of the screen.
  3. A popup window will appear over the current page that displays time-stamped notes from earlier users of the current process.
  4. At the top of the window, there is also a composition area where you can add more notes. Simply type a message in the empty field and then click on "Add Note" to add it to the Notes window.




5. Click on the X in the corner of the window to return to the process' record view.

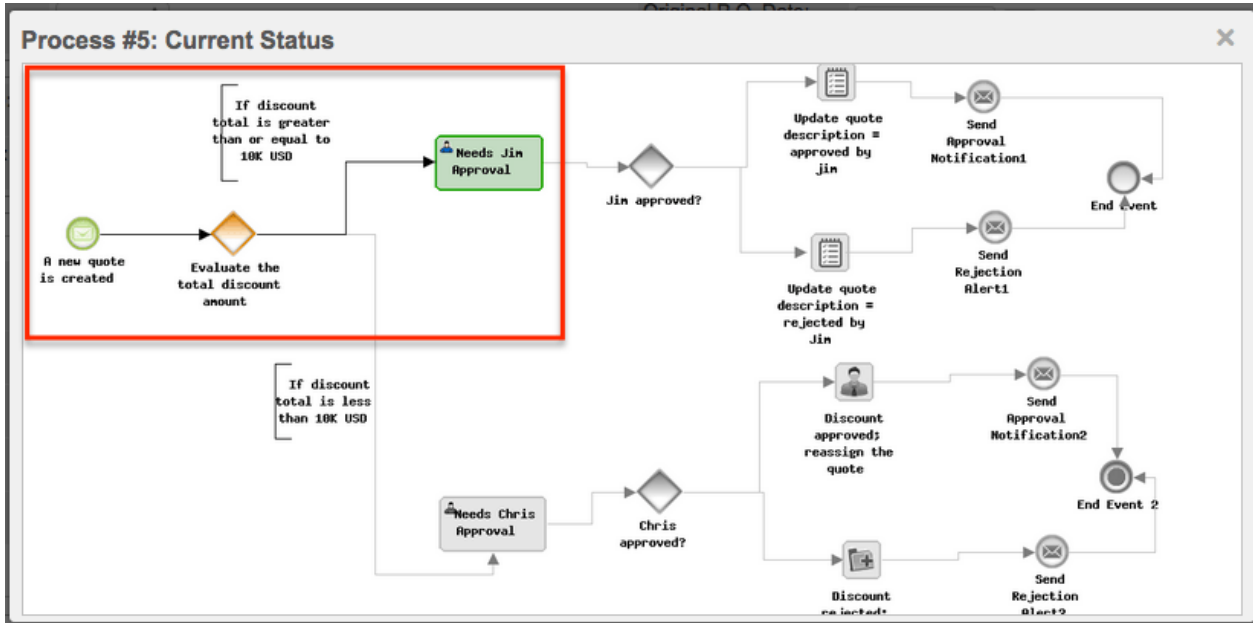
Every person that may be involved in a process will not see the process throughout its entire flow. Regular users can only see the process in list view when they have a record to approve, reject, or review. Therefore, only one regular user (non-admin) can see the notes at any given time. In other words, the notes will only be seen by users who approve/reject/review the process after the note is added.

## Previewing the Process Design

Users can view the progression of a process within the overall flow directly from the process' record view. Click on the triangle next to the Edit button to reveal the Actions menu, and then click "Show Process".

Note: In legacy user-interface modules, click the Status  icon in the upper right corner.

The process' visual design layout will open in a pop-up window, providing key information regarding the stages that have already been completed, the current stage of the process, and the stages that have yet to execute. The executed and in-progress stages of the process will be displayed in color, while bypassed or not-yet-executed stages will be presented in a grayed out style.



Visual Element	Example	Description
Colorized shapes		This element has been executed or is in progress
Gray shapes		This element has been bypassed or occurs in the future
Green-outlined activity		The activity is waiting for you (the viewing user) to respond
Red-outlined activity		The activity is waiting for a user to respond, but not the viewing user
Red glowing shape		This element is in progress
Shape containing a small crossed-out circle		The process was terminated or canceled on this element
Numeric value in parentheses		This element was triggered by multiple events concurrently  Note: This parenthetical notice may indicate that there is a flaw in the design of the process definition. Please review the conditions on the

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		triggering event to eliminate the possibility of overlapping triggers.
--	--	--

## Terminated vs. Cancelled Processes

The Advanced Workflow 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.

Last Modified: 2018-01-03 20:10:38

## 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.

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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.).

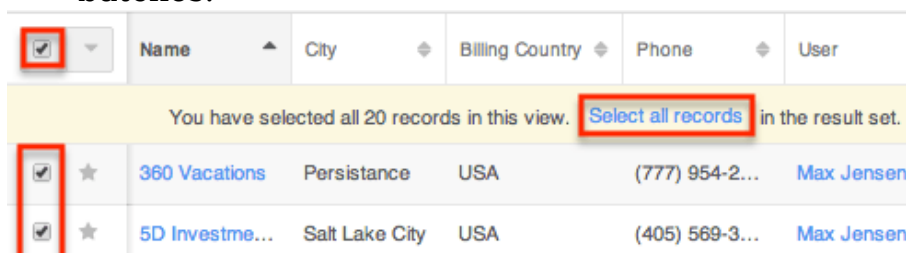
This export method is most useful when performing a type of data migration, needing an excess of detail, or performing a comprehensive import and update of the data, since this method exports all fields within a module. It is recommended the Export From Reports functionality be used for any other export 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.



The screenshot shows a table with columns: Name, City, Billing Country, Phone, and User. A header row has a checkbox with a dropdown arrow. Below the header, a yellow banner states "You have selected all 20 records in this view. [Select all records](#) in the result set." Two rows of data are visible, each with a checked checkbox in the first column. The first row is "360 Vacations" by "Max Jensen" in "Persistance", USA, with phone "(777) 954-2...". The second row is "5D Investme..." by "Max Jensen" in "Salt Lake City", USA, with phone "(405) 569-3...".

<input checked="" type="checkbox"/>	Name	City	Billing Country	Phone	User
You have selected all 20 records in this view. <a href="#">Select all records</a> in the result set.					
<input checked="" type="checkbox"/>	360 Vacations	Persistance	USA	(777) 954-2...	Max Jensen
<input checked="" type="checkbox"/>	5D Investme...	Salt Lake City	USA	(405) 569-3...	Max Jensen

4. Choose "Export" from the Actions menu.

<input checked="" type="checkbox"/>	Name	City	Billing Country	Phone	User
You have selected all 58 records in the result set. <a href="#">Clear selections.</a>					
<input type="checkbox"/>	Persistance		USA	(777) 954-2...	Max Jensen
<input type="checkbox"/>	Salt Lake City		USA	(405) 569-3...	Max Jensen
<input type="checkbox"/>	Alabama		USA	(814) 408-2...	Sarah Smith
<input type="checkbox"/>	Los Angeles		USA	(008) 217-7...	Sarah Smith

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.

### Search Calls

The screenshot shows a search interface for 'Calls'. At the top, there is a search bar and filters for 'My Items', 'My Favorites', and 'Open Items'. Below the search bar, there is a 'Delete' button and a 'Selected: 3' indicator. A dropdown menu is open, showing options: 'Select This Page (11)', 'Select All (11+)', and 'Deselect All'. The 'Export' option is highlighted in the dropdown. Below the dropdown, there are three rows of call records, each with a checkbox, a star icon, a pencil icon, and a link. The first row is 'Outbound' with the link 'Left a message'. The second row is 'Outbound' with the link 'Discuss review process'. The third row is 'Outbound' with the link 'Get more information on the proposed deal'.

4. Choose "Export" from the Actions menu.

This screenshot is similar to the previous one, but the dropdown menu is open, and the 'Export' option is highlighted. The 'Delete' button and 'Selected: 3' indicator are still visible. The call records below are the same as in the previous screenshot.



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The CSV file will be downloaded to your local machine to a location defined by your browser settings. The file can be read and manipulated as necessary.

## Exported Files From List View

When data is exported from Sugar, the file that is produced is a CSV, or "Comma Separated Value" file. When viewed in a plain text editor, a CSV file looks like a long string of text with groupings of text separated with quotation marks and commas (e.g. "First Name", "Last Name", "Title"). The file first lists out all columns that are in the file, and then the corresponding rows follow, also separated by quotation marks and commas (e.g. "Dusty", "Connor", "IT Developer").

However, most spreadsheet software, such as Microsoft Excel, will read this file and convert the quotation marks and commas into rows and columns. This makes your data much easier to read and turns it into a useful format that can be manipulated and re-purposed as need be.

	A	B	C
1	First Name	Last Name	Title
2	Dusty	Connor	IT Developer

The records that appear in your spreadsheet are dependent on what type of search, if any, you did prior to your export.

When exporting from list view, the user is left with every part of the module database information, which is often not all readable by the user. This file will only contain information specific to the module where the export was performed. This exported data will comprise of all stock and custom fields from the module. No data that would normally be found in a subpanel will appear on this export.

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. Using a Rows and Columns report, users can select the specific fields they would like to see on the export file and filter the module data however they would like. The advantage to using reports is that users will only be presented

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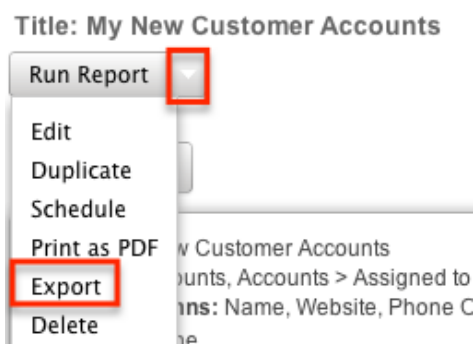
with the data that they need, and no excess data. In addition, users can also export data from related modules using reports, which is not possible when Exporting From Module List Views. Finally, because the reports are much more focused and specific, there is a higher threshold of the quantity of records that can be exported before encountering a timeout or any other such issues.

Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a 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 Rows and Columns report from the Report module's listview, or create a new one based on the information that you would like to export.
2. Click on the actions menu of the report details and select "Export".



3. The CSV file will be downloaded to your computer to a location defined by your browser settings. The file can then be read and manipulated at will.

When exporting from a report, the data is more well-rounded for a user to review. The user is allowed to determine what fields should be included on the export. This means that while reviewing it in a spreadsheet, the information appears exactly as it does in Sugar. This makes for a more positive user experience and a more focused export file. In addition, the user is able to utilize related modules 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

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long string of text with groupings of text separated with quotation marks and commas (e.g. "First Name","Last Name","Title"). The file first lists out all columns that are in the file, and then the corresponding rows follow, also separated by quotation marks and commas (e.g. "Dusty","Connor","IT Developer").

However, most spreadsheet software, such as Microsoft Excel, will read this file and convert the quotation marks and commas into rows and columns. This makes your data much easier to read and turns it into a useful format that can be manipulated and repurposed as need be.

	A	B	C
1	First Name	Last Name	Title
2	Dusty	Connor	IT Developer

The information that appears in your spreadsheet is dependent on what filters you added to your report and what display columns that you had showing. Only the information that shows in the display columns when you view your final report is what will be included in your CSV export.

Last Modified: 2017-12-14 00:57:14

## 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 and/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
- Calls
- Cases
- Contacts
- Contracts
- Custom modules (if applicable)
- Leads
- Meetings

- 
- Notes
  - Opportunities
  - Revenue Line Items
  - Targets
  - Tasks

Users with an administrator or developer role can import records into the following admin-only modules:

- Advanced Workflow modules:
  - Process Definitions
  - Process Business Rules
  - Process Email Templates
- Products modules:
  - Manufacturers
  - Products
  - Product Catalog
  - Product Category
  - Product Types
  - Tax Rates
- 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

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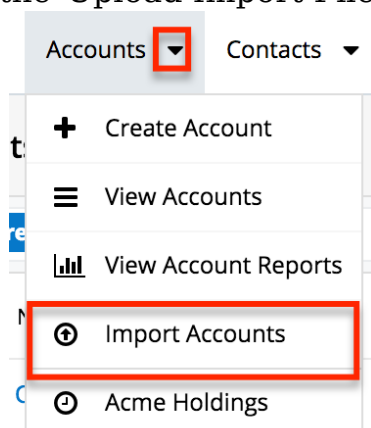
of Rows. Administrators can also limit what modules users are allowed to import into through the use of Roles.

- **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.

Select file:  No file chosen i

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.

To use pre-set import settings, select from below: i

None

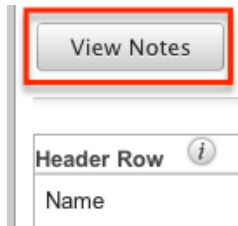
Standard Account Import Publish Delete

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.

i

File Encoding:	<input type="text" value="UTF-8"/>	Fields Delimited By:	<input type="text" value=","/> <span style="float: right;">i</span>
Fields Qualified By:	<input )"="" type="text" value="Double Quote ("/> <span style="float: right;">i</span>	Header Row:	<input checked="" type="checkbox"/> <span style="float: right;">i</span>
Date Format:	<input type="text" value="12/23/2010"/>	Time Format:	<input type="text" value="11:00 pm"/>
Time Zone:	<input type="text" value="America/Los Angeles (GMT-7:00)"/>	Currency:	<input type="text" value="US Dollars : \$"/>
Currency Significant Digits:	<input type="text" value="2"/>	Example:	<input type="text" value="123,456,789.00"/>
1000s separator:	<input type="text" value=","/>	Decimal symbol:	<input type="text" value="."/>
Name Display Format:	<input type="text" value="s f l"/> <small>"s" Salutation, "f" First Name, "l" Last Name</small>	Example:	

9. If the file was exported from either Salesforce.com or Microsoft Outlook, select the corresponding option under "If the import file data was exported from any of the following sources, select which one". If not, leave this as "None". This option will set up your mapping properly on the next screen.
10. Click "Next" to access the Confirm Field Mappings screen.
11. Click the View Notes button for any relevant information, specific to this module, to the import that you are performing.



12. This screen presents you with four columns:

- Header Row : This is the column header from your import file. This column will let you reference your file to make sure your column mapping is correct. If your import file does not have a header row, this column will not show.
- Module Field : This column contains a dropdown list of all importable fields for the module. The Import Wizard tries to match the Header Row with the corresponding Sugar field. If the suggested mapping is incorrect, use the dropdown list to change the mapping. Required fields are marked with an asterisk (\*).
- Row 1 : This column contains the values from the first row of data in your import file. This is another aid to help ensure you have your mapping correct, so that you can see the mapping using real data and not just the headers. If your import file does not have column headers, there will be an additional column for Row 2.
- Default Value : This column is hidden by default, but can be expanded if needed. When expanded, you have the option to fill in a value that will populate all records where a value for that field does not exist. For example, if you do not have anything populated in the Accounts Industry field, but you know this is a list of Technology companies, you can populate all blank values in the Industry field with the value of "Technology".



13. Click "Add Field" if any data needs to be added to the import that is not on your import file. This can be used if you would like to assign a value to a record when the column is not on your import file. This is used in conjunction with the Default Value column. For example, if you are importing these accounts, but would like to assign them all to another user, John Smith, you would click the Add Field button, select the field from the Module Field column, and populate the desired value in the Default Value column. Now, all records will be assigned to John Smith upon import.





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	
<input type="button" value="Add Field"/>			

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.

Fields to Check	Available Fields
Name	Assigned To
	Email Address
	Parent Account ID

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 bottom 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.

To save the import settings, provide a name for the saved settings: i

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.

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## Summary

5 records were created

Undo Import

Import Again

Exit

Created Records

Duplicates

Errors

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	

	A	B	C	D	E	F
1	Name	Billing City	Billing State	Billing Postal Code	Billing Country	Date_modified
2	SugarCRM	New York	NY	14402	USA	Yesterday
3		Los Angeles	CA	69904	USA	

22. Once you have downloaded the desired lists and reviewed the import, the buttons mentioned in Step 20 can be used to complete your import.

## Importing Updates to Existing Records

In addition to importing new records, Sugar's Import Wizard also has the functionality to use an import file to update existing Sugar records. The process runs very similarly to the new record import process described above.

The most important aspect to importing updates to existing records is that Sugar will only update records where there is a matching ID in the import file. Every Sugar record, regardless of what module it is in, is defined with an alphanumeric ID field. This field is typically a 36-character alphanumeric value but may be less if imported from a previous CRM. This field is the only way that the Import Wizard will know which record to update.

Note: All other fields (name, email address, etc.) are not considered unique and can have duplicates, so only the ID field will work to differentiate records for an update from import.

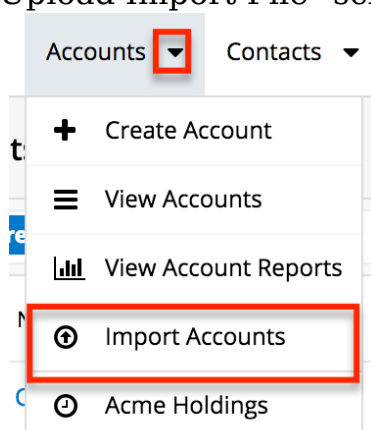
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The ID field is not usually shown in Sugar and must be found either by running a report or an export within the module.

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.

Select file:  No file chosen i

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.

To use pre-set import settings, select from below: i

None

Standard Account Import Publish Delete

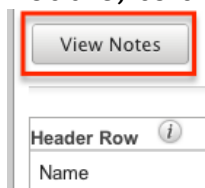
7. Click "Next" to access the "Confirm Import File Properties" screen. Before the "Confirm Import File Properties" screen opens, you will be prompted with an alert informing you that updates made to existing records cannot be undone. Read, and then click "OK" to proceed.
8. This screen will show you 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.

i

File Encoding:	<input type="text" value="UTF-8"/>	Fields Delimited By:	<input type="text" value=","/> <span style="float: right;">i</span>
Fields Qualified By:	<input )"="" type="text" value="Double Quote ("/> <span style="float: right;">i</span>	Header Row:	<input checked="" type="checkbox"/> <span style="float: right;">i</span>
Date Format:	<input type="text" value="12/23/2010"/>	Time Format:	<input type="text" value="11:00 pm"/>
Time Zone:	<input type="text" value="America/Los Angeles (GMT-7:00)"/>	Currency:	<input type="text" value="US Dollars : \$"/>
Currency Significant Digits:	<input type="text" value="2"/>	Example:	<input type="text" value="123,456,789.00"/>
1000s separator:	<input type="text" value=","/>	Decimal symbol:	<input type="text" value="."/>
Name Display Format:	<input type="text" value="s f l"/> <small>"s" Salutation, "f" First Name, "l" Last Name</small>	Example:	

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 the Confirm Field Mappings screen.
12. Click the View Notes button for any relevant information, specific to this module, to the import that you are performing.



13. This screen presents you with four columns:
  - Header Row : This is the column header from your import file. This column will let you reference your file to make sure your column mapping is correct. If your import file does not have a header row, this column will not show.
  - Module Field : This column contains a dropdown list for each row that contains the name of a field in Sugar. The Import Wizard tries to match the Header Row with the corresponding Sugar field. If the suggested mapping is incorrect, use the dropdown list to change the mapping. Required fields are marked with an asterisk (\*).
  - Row 1 : This column contains the values from the first row of data in your import file. This is another aid to help ensure you have your mapping correct, so that you can see the mapping using real data and not just the headers. If your import file does not have column headers, there will be an additional column for Row 2.
  - Default Value : This column is hidden by default, but can be expanded if needed. When expanded, you have the option to fill in a value that will populate all records where a value for that field does not exist. For example, if you do not have anything populated in the Accounts Industry field, but you know this is a list of Technology companies, you can populate all blank values in the Industry field with the value of "Technology".

Header Row <i>i</i>	Module Field <i>i</i>	Row 1 <i>i</i>	< Default Value <i>i</i>
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	

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 bottom 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: i

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.

**Summary**

5 records were created

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:
  - o 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



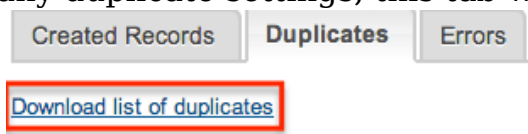
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re-accessed for this import. As soon as you navigate away from this page, the import is considered complete. This button will not show if there were no new records created.

- 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.



Here are the rows in the import file that were not imported due to errors.



Note: Similar to the option to download duplicate records, you also have the option to download the list of errors using the two links provided:

- The "Download list of errors" option will produce a new CSV file with columns showing (from left to right) the error, the field affected, the value, and the line in your original import file where the error occurred.

	A	B	C	D
1	Invalid datetime	Date Modified: (date_modified)	Yesterday	2
2	Required value missing	Name: (name)	NULL	3

- The "Download list of rows that were not imported" option will download a new CSV file with the same format of your original one,

containing only the rows that were not imported so that you can correct the errors and then re-import.

	A	B	C	D	E	F
1	Name	Billing City	Billing State	Billing Postal	Billing Count	Date_modified
2	SugarCRM	New York	NY	14402	USA	Yesterday
3		Los Angeles	CA	69904	USA	

The screenshot shows an import error log with two rows. The first row is for 'SugarCRM' with 'Date Modified' set to 'Yesterday', which is highlighted with a red box. An error message 'Error: Invalid datetime' is shown next to it, with 'Field Name: Date Modified: (date\_modified)' and 'Value: Yesterday' also highlighted. The second row is for 'Los Angeles' with 'Name' set to 'NULL', which is highlighted with a red box. An error message 'Error: Required value missing' is shown next to it, with 'Field Name: Name: (name)' and 'Value: NULL' also highlighted.

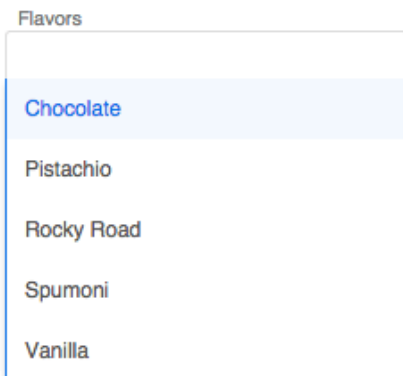
23. Once you have downloaded the desired lists and reviewed the import, the buttons mentioned in Step 21 can be used to complete your import.

## 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

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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.

	A	B	C	D
1	First Name	Last Name	ID	Flavors
2	Benny	Blackmore	aa7fb471-d90d-3beb-3b03-5488b9f99170	Chocolate
3	Wes	Lathrop	aaf2441d-6598-4db5-300b-5488b99e6636	Chocolate
4	Kate	Treack	d7d8e000-55f1-f310-5c43-5488b90a4462	Chocolate,Rocky Road
5			4717-60c8-01dd-5488b93b4c65	Chocolate,Rocky Road
6			36bf-107b-bf88-5488b91f1f1f	Chocolate,Rocky Road
7			8cbd-912a-eab2-5488b98dc7dc	Chocolate,Rocky Road
8			d8d7-15ad-6054-5488b919ba23	Chocolate,Rocky Road
9			df10-9560-5354-548f6440dd91	Vanilla
10			ad5a-b55e-e325-548f64ff3f9a	Vanilla
11			b391-ef04-1adf-548f64973ede	Vanilla
12			5a4-9972-52de-548f646d3850	Vanilla
13			073e-c429-d9e2-548f644fd267	Vanilla
14			789f-b3f1-45b0-5488b9a2236d	Vanilla
15			0052-10e9-bfca-5488b98c6fa4	Vanilla
16			2572-bbed-91ff-5488b9969bcd	Vanilla
17			58cf-0241-d686-5488b9001c7d	Vanilla
18			cbc6-e1f9-e265-5488b99fb2b7	Vanilla
19			e3b4-f925-069a-5488b92062c0	Vanilla
20	Shanene	Denman	ef750c4dd-fe2d-364b-9726-5488b96e0e6c	Vanilla

- If the Flavors column contains any empty cells, type the word Chocolate in those cells. In the remaining cells of the Flavors column, add ,Chocolate (with a leading comma but no extra spaces) to the end of the existing character string.

	A	B	C	D
1	First Name	Last Name	ID	Flavors
2	Justine	Cambra	f3192b55-09ce-65a7-8a57-5488b9595d78	Vanilla,Chocolate
3	Hugo	Bork	e6280f35-6c18-1b8a-f786-5488b95a56a3	Vanilla,Pistachio,Chocolate
4	Jewell	Haas	f0eae666-a073-6209-4c29-5488b965d593	Vanilla,Pistachio,Spumoni,Chocolate
5	Beulah	Randel	d1cb0162-83da-2fb2-1b1f-5488b91ba650	Chocolate
6	Abdul	Ducote	d3c422fd-105a-8f74-5bed-5488b9aee0db	Chocolate
7	Royal	Dockins	d789f052-968d-8ae0-c781-5488b9465c56	Chocolate
8	Toney	Denman	dc9ae08d-6c17-94ee-3fe7-5488b948499e	Chocolate
9	Hilda	Mire	dcc7362b-fb2c-24e0-78c7-5488b950e1ab	Chocolate

- Save this file for import.
- Follow the steps in the Importing Updates to Existing Records section of this documentation to complete the import and update process.

## Importing Relationships

There are many situations where imports need to forge a relationship between two modules. A common example of this would be how importing contacts without an account name would leave the contacts orphaned and not linked to any parent account. To solve this problem, Sugar allows one-to-many and one-to-one relationships to be imported during the standard import process. The available fields will vary depending on the module being imported and will show on the Import Template.

Please note that when an opportunity is imported into Sugar, a revenue line item must also be imported and related to the opportunity in order to populate the amounts (e.g. best, likely, etc.) on the opportunity record. Be sure to include the opportunity ID and amounts on the revenue line item import file.

When importing a relationship, Sugar will need the related record's unique ID, or, in some cases, will accept the record's Name field. Examples of the fields that relate one module to another are explained below. For additional tips and steps to import related records, please refer to the Importing Related Records article.

Module	Module Related To	Field(s) Used For Relationship	Instructions For Import
Accounts	Accounts	Member Of	<p>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.</p> <p>Using an account name that Sugar does not recognize will create an additional new account record.</p> <p>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.</p>
		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	<p>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.</p> <p>Related To Module: The Sugar module's plural name for the record that you are going to relate (Accounts, Contacts, etc.).</p> <p>Related To ID: The ID for the record you are relating.</p>
Cases	Accounts	Account ID	Use the existing Sugar account record ID to relate the case to the account record.
		Account Name	<p>Use the existing Sugar account name or record ID to relate the contact to the account record.</p> <p>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</p>

			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	<p>Use the existing Sugar account name or record ID to relate the contact to the account record.</p> <p>Using an account name that Sugar does not recognize will create a new account record with a relationship to the contact.</p> <p>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.</p>
	Campaigns	Campaign	Use the existing Sugar campaign name or campaign record ID to relate the contact to the



		<p>campaign record.</p> <p>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.</p>
	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	<p>Email Address</p> <p>Non-Primary Email Address</p>	Importing an existing email address into Sugar's Contacts module will cause all email messages related to that email address may match the contact's primary or non-primary email address and must be exact for the relationship to form properly.

			Note: Importing an update to a contact with an existing email address, the Opt-Out and Invalid checkboxes will not be disabled if they are checked on the existing email address.
Leads	Accounts	Account ID	Use the existing Sugar account record ID to relate the lead to an existing account record. This is not a relationship that can be forged from the Leads module in Sugar. This can be created from an Account record, though. This relationship is usually formed through the Lead Conversion process.
		Account Name	In Leads, this is just a text field. This will not create any relationships. Upon conversion, an Account can be created. For more information on converting leads, please review the Lead Conversion documentation.
	Campaigns	Campaign	Use the existing Sugar campaign name or campaign record ID to relate the lead to the campaign record.

		<p>Note: If you are using the campaign name, it must be exactly as it shows in Sugar. For example, if your campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the lead will not relate properly.</p>
	<p>Campaign ID</p>	<p>Use the existing Sugar campaign record ID number to connect the campaign name into the new lead record.</p>
<p>Contacts</p>	<p>Contact ID</p>	<p>Use the existing Sugar contact record ID to relate the lead to an existing contact record. This is not a relationship that can be forged from the Leads module in Sugar. This can be created from a contact record, though. This relationship is usually formed through the Lead Conversion process. For more information on converting leads, please review the Lead Conversion documentation.</p>

Opportunities	Opportunity ID	Use the existing Sugar opportunity record ID to relate the lead to an existing opportunity record. This is not a relationship that can be forged from the Leads module in Sugar. This can be created from an opportunity record, though. This relationship is usually formed through the Lead Conversion process. For more information on converting leads, please review the Lead Conversion documentation.
	Opportunity Name	In Leads, this is just a text field. This will not create any relationships. Upon conversion, an opportunity can be created. For more information on converting leads, please review the Lead Conversion documentation.
Emails	Email Address  Non-Primary Email Address	Importing an existing email address into Sugar's Leads module will cause all email messages related to that email address may match the lead's primary or

			<p>non-primary email address and must be exact for the relationship to form properly.</p> <p>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.</p>
Meetings	Contacts	Contact ID	<p>Use the existing Sugar contact record ID number to connect the contact name into the new meeting record.</p>
	Flex Relate	<p>Related To Module</p> <p>Related To ID</p>	<p>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.</p> <p>Related To Module: The Sugar module's plural name for the record that you are going to relate (Accounts, Contacts, etc.).</p> <p>Related To ID: The ID for the record you are relating.</p>

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	<p>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.</p> <p>Related To: The Sugar module's plural name for the record that you are going to relate (Accounts, Contacts, etc.).</p> <p>Related To ID: The ID for the record you are relating.</p>
Opportunities	Accounts	Account ID	Use the existing Sugar account record ID to relate the opportunity to the account record.
		Account Name	<p>Use the existing Sugar account name or record ID to relate the opportunity to the account record.</p> <p>Using an account name that Sugar does not recognize will create a new account record with</p>

		<p>a relationship to the opportunity.</p> <p>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.</p>
Campaigns	Campaign	<p>Use the existing Sugar campaign name or campaign record ID to relate the opportunity to the campaign record.</p> <p>Note: If you are using the campaign name, it must be exactly as it shows in Sugar. For example, if your campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the opportunity will not relate properly.</p>
	Campaign ID	<p>Use the existing Sugar campaign record ID number to connect the campaign name</p>

			into the new opportunity record.
Revenue Line Items	Accounts	Account ID	Use the existing Sugar account record ID to which the revenue line item's opportunity belongs Note: The Account Name field in revenue line items is normally populated based on the selected opportunity's related account and cannot be manually modified on the record view. If you import using the Opportunity ID and Opportunity Name, the related account name will automatically populate in the Account Name field.
		Account Name	Use the existing account name related to the revenue line item's opportunity Note: The account name must be entered exactly as it appears in Sugar in order for the records to be related properly.
	Campaigns	Campaign ID	Use the existing Sugar campaign record ID number from which the revenue line item's



		opportunity originated
	Campaign	Use the existing Sugar campaign name that is related to the revenue line item's opportunity  Note: The campaign name must be entered exactly as it shows in Sugar. For example, if your campaign in Sugar is "End of Year Newsletter", but your import file contains "End of Year News" or "End of Year Promotion", the revenue line item will not relate properly.
Opportunities	Opportunity ID	Use the existing Sugar opportunity record ID number to relate the revenue line item to the opportunity record
	Opportunity Name	Use the existing opportunity name as it appears in Sugar to relate the revenue line item
Products	Product Template ID	Use the existing Sugar product catalog record ID number to relate to the revenue line item
	Product	Use the existing product catalog

			name as it appears in Sugar to relate to the revenue line item
Targets	Accounts	Account Name	In Targets, this is just a text field. This will not create any relationships.
	Campaigns	Campaign ID	Use the existing Sugar campaign record ID number to connect the campaign name into the new target record.
	Leads	Lead ID	Use the existing Sugar lead record ID to relate the target to an existing lead record. This is not a relationship that can be forged from either module in Sugar. This relationship is usually formed through the target conversion process. For more information on converting targets, please review the Lead Conversion documentation.
Tasks	Contacts	Contact ID	Use the existing Sugar contact record ID number to connect the contact name into the new Task record.
	Flex Relate	Related To ID	On the import

		Related To Module	<p>template, there are columns for both "Related To ID" and "Related To Module". Both need to be used to form the proper relationship.</p> <p>Related To ID: The ID for the record you are relating.</p> <p>Related To Module: The Sugar module's plural name for the record that you are going to relate (Accounts, Contacts, etc.).</p>
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## 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,

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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.

To use pre-set import settings, select from below: ⓘ

None

Standard

Account Import

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.

To save the import settings, provide a name for the saved settings: ⓘ

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".

To use pre-set import settings, select from below: ⓘ

None

Standard

Account Import

- 
- **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 and/or a matching email address to an existing contact in Sugar will be marked as a duplicate.

Fields to Check	Available Fields
Last Name	Assigned User ID
Email Address	First Name
	Full Name
	Reports To ID

The duplicate check fields used in each module differ depending on what fields are available to the module. Not all fields are used or available in the duplicate check and are pre-determined based off of system-defined indexes.

If your import file has any duplicate records based off the fields you elect to verify against, the first record will be imported, and then all subsequent records in the file matching the duplicate criteria will be flagged.

Any duplicates will show as such on the final page of the import. You will also have 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

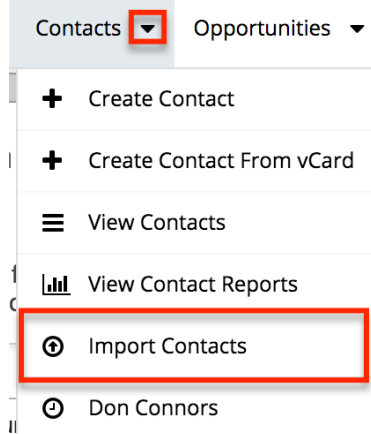
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outside application or service through the Import Wizard and have Sugar pull the information directly from the source. This functionality is currently only available for Google Contacts.

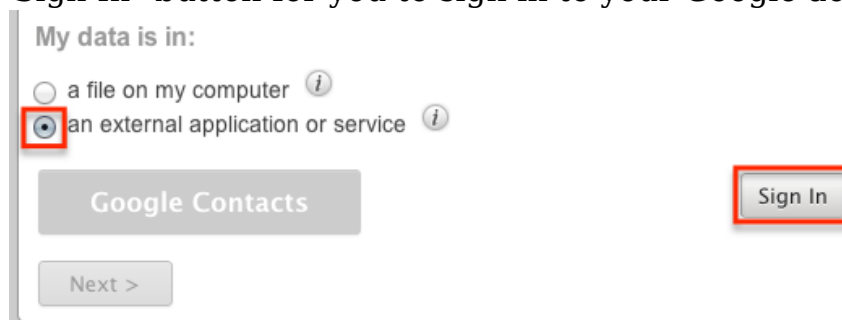
The import process is very similar to what is described above, but with some differences to speed up the process for users who would like to import all contact data into Sugar

## Importing Data From Google

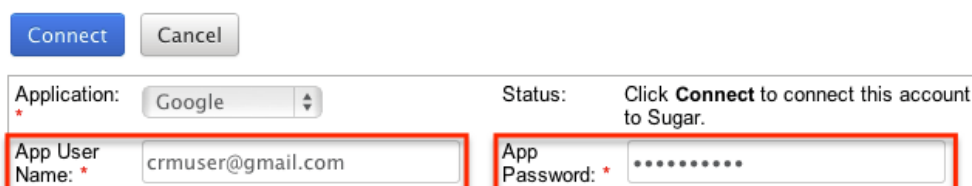
1. Navigate to the module tab for the person-type module (e.g. Contacts) that you are importing into and select the import option. This will open the Import Wizard and bring you to the "Select Data Source" screen.



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.



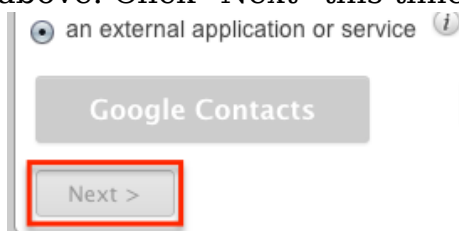
3. Fill in your user name and password for the Google account you would like to connect to and click "Connect".



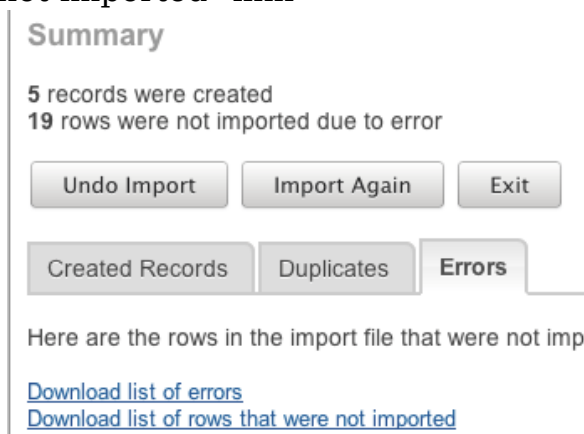
4. Upon connecting, you will be brought to your user profile, on the "External Accounts" tab. Navigate back to the import screen, repeating steps 1 and 2

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above. Click "Next" this time, instead of Sign In.



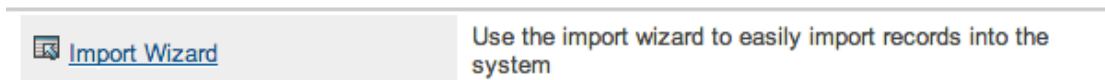
5. This will direct you to the "Confirm External Source Properties" page, which is very similar to the mapping screen from a data import from a file on your computer. Change any mapping necessary specific to your Google account and your Sugar instance. Any field in the Module Field column marked with 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

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you will need to select the module you wish to import data. The dropdown provided includes options for all importable modules in one convenient location. Once you select the module from the list, click "Next" and you will be directed to the standard import wizard where you can import new records or update existing ones

Last Modified: 2018-03-23 17:40:48

## Employees

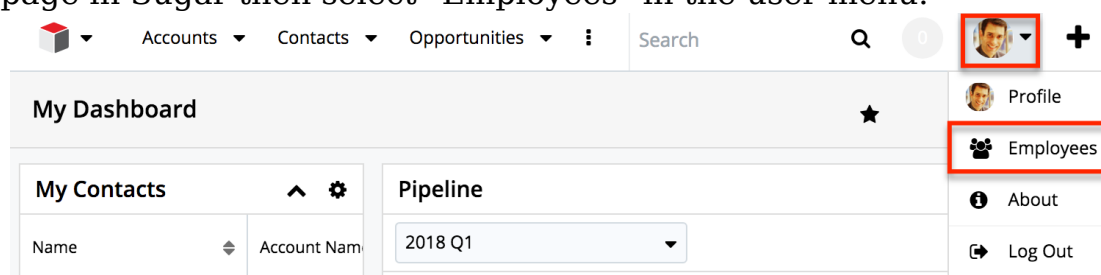
### Overview

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,



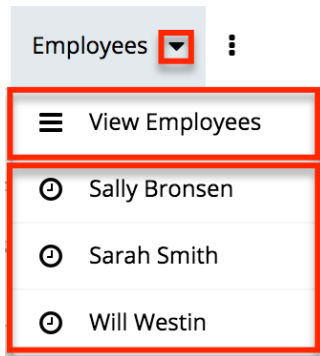
or remove fields via Admin > Studio. For more information on configuring fields, please refer to the Fields documentation in the Administration guide.

Field	Description
City	The city of the employee's address
Country	The country of the employee's address
Department	The department where this employee works
Email Address	The employee's email address
Employee Status	The employee's employment status in the organization, either: Active, Terminated, or Leave of Absence
Fax	The employee's fax number
First Name	The employee's first name
Home Phone	The employee's home phone number
IM Name	The employee's instant message screen name
IM Type	The employee's instant message client type
Last Name	The employee's last name
Mobile	The employee's mobile phone number
Notes	A description or other information about this employee
Office Phone	The employee's office phone number and extension
Other	An additional phone number for the employee
Picture	A picture, headshot, or identifying image of the employee
Primary Address	The number and street of the employee's address
Postal Code	The postal code of the employee's address
Reports to	This field 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

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## 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.

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## 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.

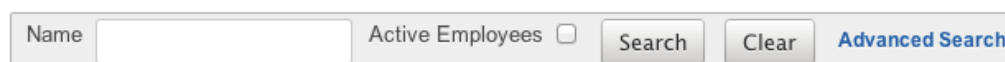
### Basic Search

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



The screenshot shows a search interface with the following elements: a text input field labeled 'Name', a checkbox labeled 'Active Employees', a 'Search' button, a 'Clear' button, and a blue 'Advanced Search' link.

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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.

The screenshot displays the Advanced Search interface for Employees. It features several search criteria fields arranged in a grid:

- First Name, Last Name, Employee Status (dropdown menu with options: Active, Terminated, Leave of Absence)
- Title, Any Phone, Department
- Any Email, Any Address, City
- State, Postal Code, Country

At the bottom, there is a "Layout Options" section with a "Save search as:" field and "Save", "Update", and "Delete" buttons. Below that are "Search" and "Clear" buttons, a "Basic Search" link, a "Saved Searches" dropdown menu (currently showing "-none-"), and a help icon.

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When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "Active Employees" and enter an employee's name, Sugar will only return employee records with a matching name that are active. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all employee records, simply click "Clear" and then "Search" to perform a blank search with no filters.

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

## Employees List View

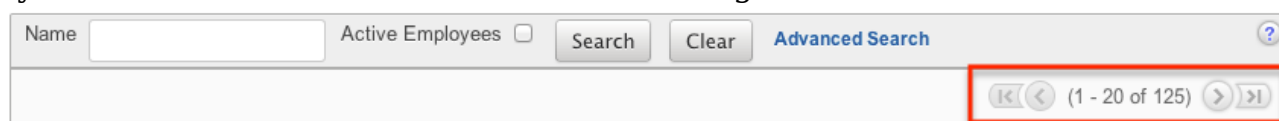
The Employees list view displays all employee records meeting the current search criteria. You can view the basic details of each employee within the field columns.

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

## Pagination

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

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



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## 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.

Name ↕	Department ↕	Title ↕	Reports To
Jim Brennan	Sales	VP Sales	Chris Olliver

## Employees Detail View

The Employees detail view displays thorough employee information by way of all employee fields grouped into one page.

Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

## Next or Previous Record

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

» Jim Brennan



Employee Status: Active	Picture: 
Name: Jim Brennan	

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# Mobile Browser

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 SugarCRM 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 SugarCRM Mobile User Guide for your specific mobile device (i.e. Android, iOS).

Note: Please be aware that some features covered in the SugarCRM Mobile user guides may be unavailable in the mobile browser view.

Last Modified: 2018-01-24 23:55:51

## 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 champlon 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: Visibility of tagged records when viewing related records (e.g. accounts) will be subject to team and role restrictions. 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	<a href="#">SugarCon 2016 Visitor</a>	Opens the tag's record view
Report Results	Hyperlink	<a href="#">SugarCon 2016 Visitor</a>	
My Tags Dashlet	Hyperlink	<a href="#">SugarCon 2016 Visitor</a>	
Related Module List View Dashlet	Hyperlink	<a href="#">SugarCon 2016 Vi...</a>	Opens global search View All Results page
Related Module List View	Hyperlink	<a href="#">SugarCon 2016 Visitor</a>	
Related Module Record View	Pill	<span>SugarCon 2016 Visitor</span>	
Intelligence Pane (Preview)	Pill	<span>SugarCon 2016 Visitor</span>	
Subpanel List View	Hyperlink	<a href="#">SugarCon 2016 Visitor</a>	
Global Search Bar	Tag Ribbon	 <span>SugarCon 2016 Visitor</span>	Adds the tag as a Global Search filter

Note: When editing a record, the tag pills displayed in the Tags field are not

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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 to 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 Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Dashlets Viewing via Reports	There are various options available for viewing tag records in Sugar including via Tags list view, Tags record view, Tags Recently Viewed menu, dashlets, and reports. Unlike other Sugar modules, users can see all tag records regardless of their team membership,

	<p>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.</p>
<p>Searching for Tags List View Search Creating a Filter Saving a Filter</p>	<p>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.</p>
<p>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</p>	<p>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.</p>
<p>Tags Record View Favorite Designation Next or Previous Record Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Dashboards</p>	<p>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.</p>
<p>Exporting Tags</p>	<p>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).</p>
<p>Viewing Tag Change Logs</p>	<p>The Viewing Record Change Logs</p>

	<p>section describes the View Change Log record view option which displays a history of changes to the tag's audited fields.</p> <p>Note: Only the Assigned User Id field is audited for the Tags module and will, therefore, be the only field displayed in the change log.</p>
<p>Favoriting Tags  Favoriting via List View  Favoriting via Record View  Favoriting via Subpanel</p>	<p>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.</p>
<p>Sharing Tags</p>	<p>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.</p>

## 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.

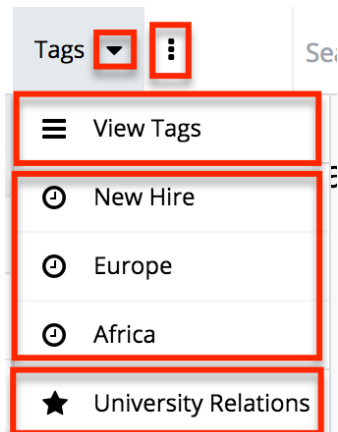
### Module Tab Menus

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.

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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

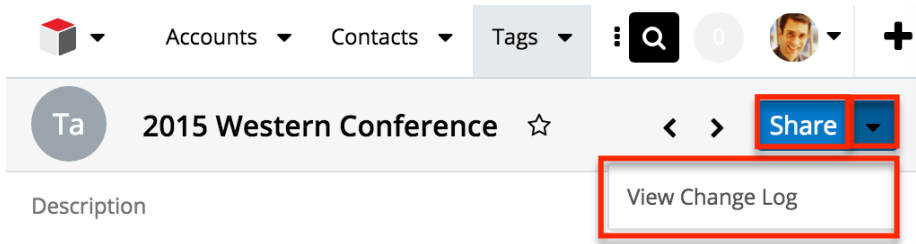
If you do not see the Tags module tab in Sugar, please check the following:

- 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 Change 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

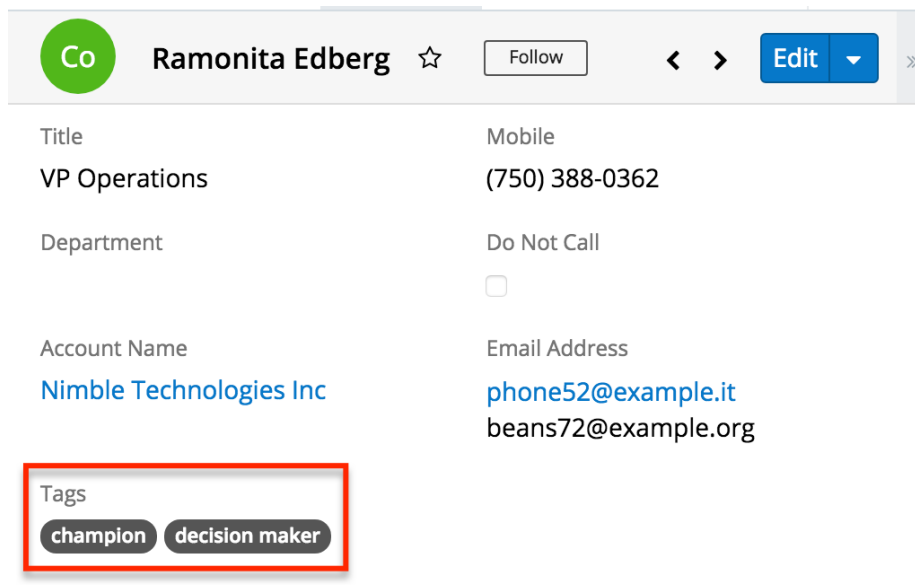
### Creating via Tags Module

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.

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## 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.



The screenshot shows a record view for Ramonita Edberg. The header includes a profile picture (a green circle with 'Co'), the name 'Ramonita Edberg', a star icon, a 'Follow' button, and navigation arrows. Below the header, there are two columns of fields: 'Title' (VP Operations), 'Mobile' ((750) 388-0362), 'Department' (Do Not Call), and 'Account Name' (Nimble Technologies Inc). The 'Email Address' field contains two addresses: phone52@example.it and beans72@example.org. At the bottom, the 'Tags' field is highlighted with a red box and contains two tags: 'champion' and 'decision maker'.

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.





Title	Mobile
VP Operations	(750) 388-0362
Department	Do Not Call
	<input type="checkbox"/>
Account Name	Email Address
Nimble Technologies Inc	phone52@example.it
	beans72@example.org

Tags  
  
 Please enter 1 or more character  
[Show more...](#)

- 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.

Tags  
 biking   
 s (New Tag)  
 scrum  
**shuffleboard**  
 soccer  
 sports

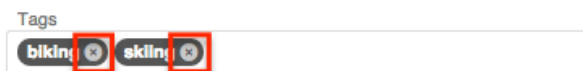
- To ignore the recommendations and create an entirely new tag, completely type out the word or phrase and then click on the New Tag menu option. Alternatively, use a comma or the Enter key to indicate the end of a tag. Take care not to create duplicate or synonymous tags unintentionally. Please note that new tags will not be saved to the database until you save the record that contains the new tag.

Tags  
 biking   
**skiing (New Tag)**  
[Show more...](#)

- 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

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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.

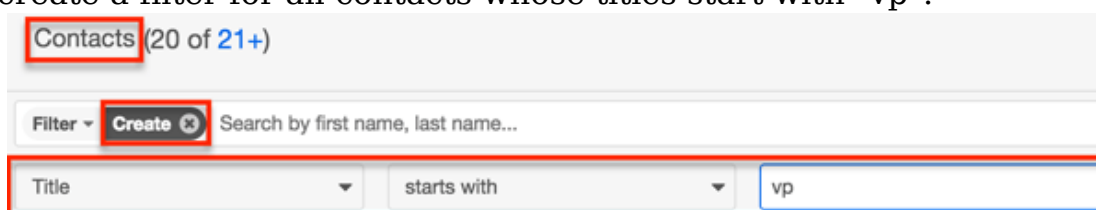
## Tagging via Mass Update

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:

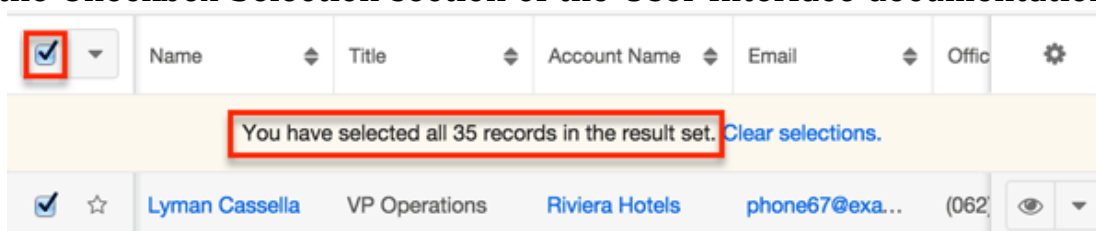
- Add one or many tags to a group of records
- Use any combination of new and existing tags
- Replace existing tags or append additional tags to existing tag lists

Follow these steps to tag multiple contact records via mass update as an example:

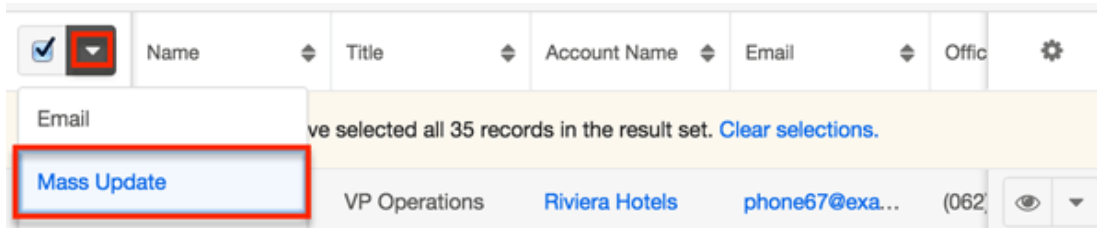
1. Navigate to the Contacts list view.
2. Filter or search for the set of records you would like to tag. For example, create a filter for all contacts whose titles start with "vp".



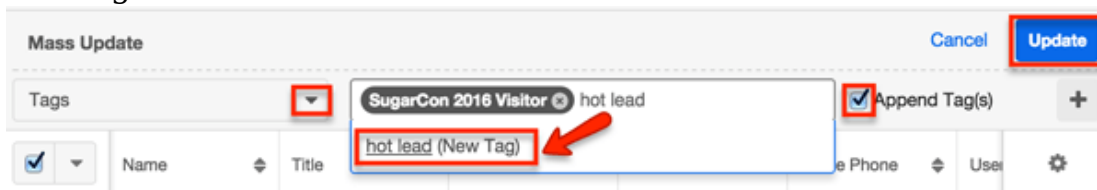
3. Select all results or select the checkboxes next to the appropriate records. For more information about selecting multiple records at once, please refer to the Checkbox Selection section of the User Interface documentation.



4. Click on the list view Actions menu and select "Mass Update".



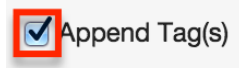
- In the mass update bar, choose the Tags field and begin typing the phrases you would like to use as tags one at a time in the empty text box. When you enter the first letter of a tag, Sugar will begin to display recommended tags that begin with the same letter.



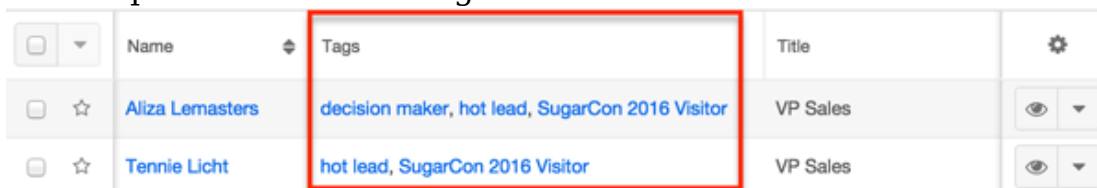
- Click on the tag suggestion to add the pill to the mass-update text box, or click the New Tag suggestion to create a new tag. Alternatively, press enter or the comma key. Continue adding tags if desired. For more information on tagging records, please refer to the Tagging via Record View section of this documentation.



- 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.



- 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

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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
3			

For more information on importing records with the Tags field, please refer to the [Importing Data](#) documentation.

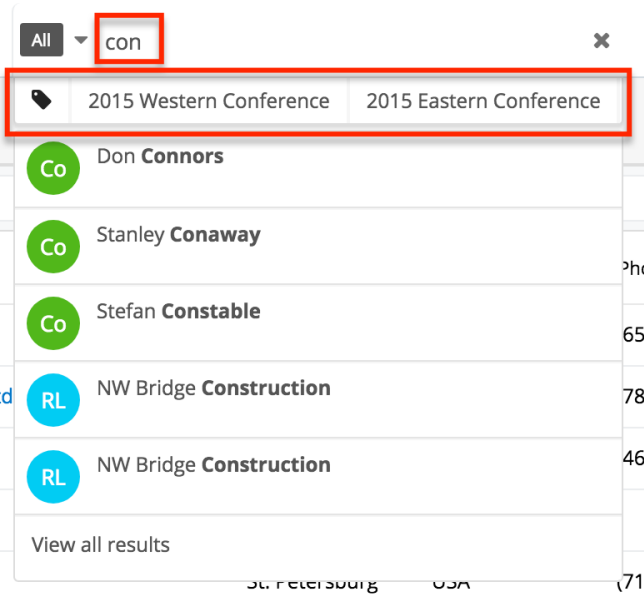
## Using Tags in Global Search

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.

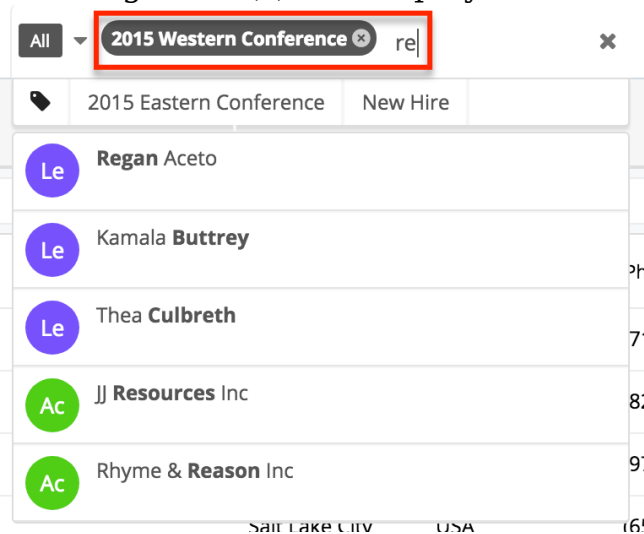


Users can locate and select tags as global search filters to easily locate groups of records that are tagged by common attributes. For example, if you have a set of leads that were acquired from a specific conference (e.g. 2015 Western Conference) and you wish to locate all the lead records tagged with 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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