Sugar Professional 10.3 Administration Guide

Sugar Professional 10.3 Administration Guide

This guide describes options that enable Sugar administrators to configure the application to meet their organization's requirements.

Last Modified: 2020-11-30 17:17:29

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. Manage your relationships from inception to fruition and beyond with Sugar's built-in modules and fields as well as custom configurations that are available to Sugar administrators.

Core Admin Features

- [User](), [Password](), [Team](), and [Role]() management to manipulate user access
- [Email]() management to configure incoming and outgoing system email accounts and behaviors
- [System]() management to control functional aspects and system-wide preferences within Sugar
- [PDF Manager]() to create templates controlling the appearance of generated PDF files
- [Studio]() to tailor existing modules to your organization's needs by adding or modifying fields, relationships, and layouts
- [Module Builder]() to create new, custom modules as needed to fully match your organization's processes

Last Modified: 2020-11-30 17:17:29

Admin Wizard

Overview

Sugar offers administrators a wide range of configuration options to set up their account. Upon your initial log into Sugar, you will go through configuring some basic settings (i.e. Your Information, Your Locale, etc.) for your user profile. You may skip these steps and configure these settings in your user preferences at a later time. Once your user profile set up is complete, you will be able to navigate to a specific area of Sugar to perform various administrative functions (e.g. importing data, creating users, configuring the application via Studio, etc.) as well. Please note that system administrators can also set up each user's basic settings when creating a user in Sugar. This documentation will cover the various options available when first accessing your Sugar account.

Note: For instances that use SugarIdentity, the administrator will need to access [SugarIdentity](#) via the SugarCloud Settings console to create and manage [user records](#) as well as configure [password requirements](#) and set up [LDAP/SAML authentication](#).

Login Screen

The Sugar login screen is where you enter your login credentials (User Name, Password) to access your instance. Please note that this applies to instances that do not use SugarIdentity as well as instances that use [SugarIdentity](#). To access Sugar's login screen, enter in your Sugar instance URL (e.g., https://example.sugarondemand.com) in your web browser. If you do not know your instance URL or login credentials, please reach out to another system administrator in your organization for assistance. Sugar's Admin Wizard will launch upon your first successful login allowing you to configure various system-wide settings as well as some personal settings. For more information on logging in to Sugar, refer to the [Getting Started](#) documentation.

Note: If your organization uses multiple [SugarIdentity-enabled instances](#) (e.g. production, sandboxes) and you have accessed different user accounts in the tenant(s) (e.g. ABC Production, ABC Test Sandbox), the login screen will display an [account selector](#) with the list of users you have logged in as for the current instance you are accessing.
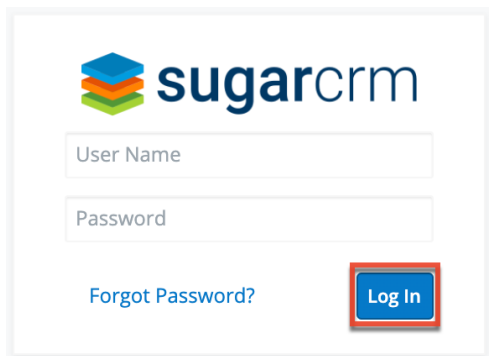
Note: If your instance has more active users than is allowed by your Sugar license, a warning is displayed on the login screen and regular users will not be able to log in. Admin users will be able to log in but will be redirected to the Users module. For more information, see the [Understanding User Types, License Types, and Sugar Licenses](#) article.

Language

Users have the option to choose the primary language they want to be displayed in Sugar by clicking the Language icon on the bottom right of the Login screen. The Language dropdown list will appear allowing you to select the appropriate language you want to be displayed in your Sugar account. The out-of-the-box default language in Sugar 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 [Locale](#) section of the System documentation. Once the default language is changed, it will display as the default selection on the login screen for all users.

Please note that you must select the language that you want to be displayed each time you log in, otherwise the default language will display in Sugar.

Administrators can also configure what languages are available to select in the Language dropdown list via Admin > Languages. For more information on managing the available languages, please refer to the [Languages](#) section of the System documentation.
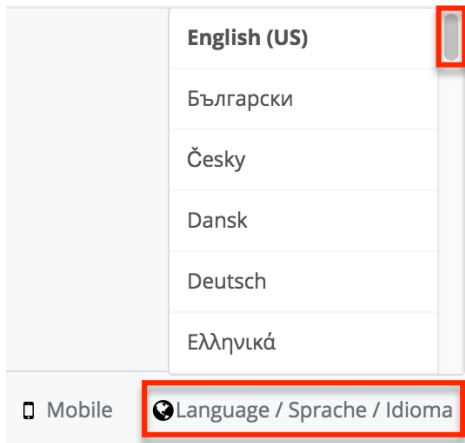
The following languages are available to display in Sugar:

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
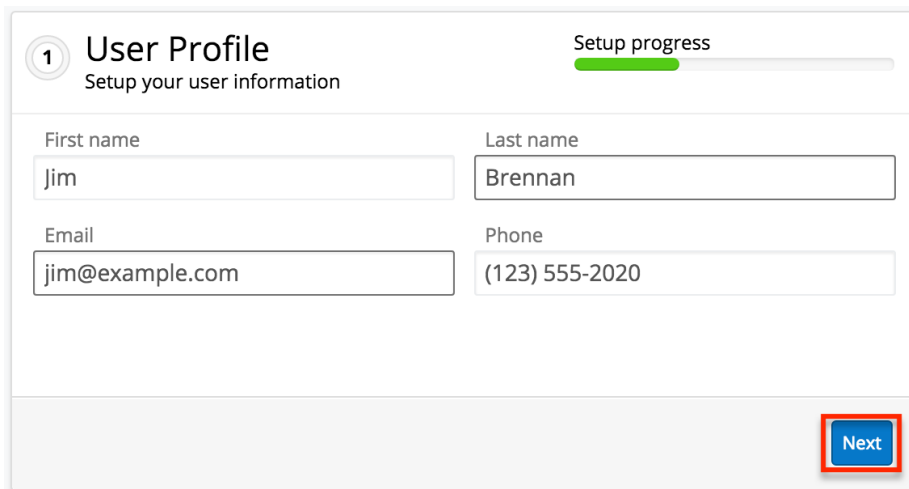
Your Information

Once the Admin Wizard is completed, you will have the option to configure some of your personal settings via the User Wizard. The User Profile step is where you can enter key information (i.e. name, email address, and phone) about yourself to be stored in your user profile. Please note that the information you provide on this step can be updated in your user preferences at a later time if desired. For more information on configuring your personal information under user preferences, refer to the [Getting Started](#) documentation.

Note: For instances that use SugarIdentity, the User Profile step of the User Wizard is read-only and the displayed fields (e.g. First Name, Last Name) can only be edited in [SugarIdentity](#) via the SugarCloud Settings console.

The following options are available to configure your user profile:

- **First Name** : Enter your first name.
- **Last Name** : Enter your last name.
- **Email** : Enter your email address.
- **Office 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".

Your Locale

The Your Locale step is where you can configure the date, time, and name format you want to be displayed in Sugar based on your current geographical location. Please note that the information you provide on this page will override the system locale settings and can be updated in your user preferences at a later time if

desired. For more information on configuring your locale settings, please refer to the [Locale Settings](#) section of the Getting Started documentation.

The following options are available to configure your locale settings:

- **Time Zone** : Select the time zone based on your current location.
- **Date Format** : Select the format you want the date stamps displayed in Sugar.
- **Time Format** : Select the format you want the time stamps displayed in Sugar.
- **Name Format** : Select the format you want the concatenated name fields displayed in Sugar's list view and record view.

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

The following page confirms that you are ready to use Sugar and allows you to perform various administrative functions (e.g. importing data, creating users, configuring the application via Studio, etc.). Selecting the action item(s) will take you directly to the specific area of the Admin page to create new users, import data from external sources, etc. Please note that you can click "Start Sugar" to go directly to your Sugar account if you wish to configure these settings at a later time.
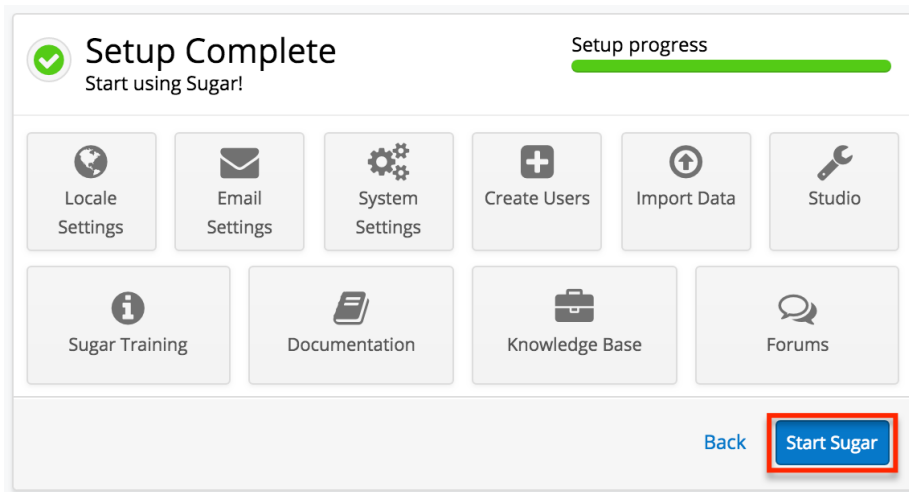
Last Modified: 2021-08-23 19:07:28

SugarCloud Management

Overview

The SugarCloud section of Sugar's Admin page allows administrators to view, access, and manage key information and data pertaining to your instance hosted in Sugar's cloud environment. Please note that the options in the SugarCloud section are only available for SugarCloud customers.

The SugarCloud section contains the following menus:

Menu	Description
SugarCloud Settings	Create and manage user records, manage password requirements, and set up LDAP, SAML, or OIDC authentication

	in SugarIdentity via the SugarCloud Settings console
[SugarCloud Insights](#)	Monitor your instance's database and file system storage usage, license usage, and gain access to PHP error logs and access logs
[Download Backups](#)	Access and download backup files of your Sugar instance via the Backups module
[Notification Settings](#)	Manage the email addresses that should receive important SugarCloud service notifications (e.g. upgrade notifications)

SugarCloud Settings

SugarIdentity allows customers to securely manage user identities as well as access applications and services in the SugarCRM ecosystem. SugarIdentity provides a federated identity solution based on industry standards and supports comprehensive single sign-on for the Sugar application, [Sugar Plug-in for Outlook](#), [Sugar Connect](#), [Sugar Discover](#), and [Sugar Mobile](#). The SugarIdentity service is managed via the SugarCloud Settings console which can be accessed by clicking "SugarCloud Settings" on the Admin page. When a SugarCloud instance uses SugarIdentity, the administrator will access SugarIdentity in the SugarCloud Settings console to [create and manage user records](#), [manage password requirements](#), as well as set up [LDAP](#), [SAML](#), or [OIDC](#) authentication. For more information on SugarIdentity, refer to the [SugarIdentity Guide](#).

Note: Only some SugarCloud instances use SugarIdentity. Refer to the [SugarIdentity Guide](#) to determine if yours is configured to do so. Existing customers will be notified before their instances begin using the service.

SugarCloud Insights

SugarCloud Insights allows administrators of instances hosted on Sugar's cloud servers (i.e., sugarondemand.com) to easily monitor their instance's database and file system storage usage, license usage, as well as gain access to PHP error logs and access logs.

Administrators can access the SugarCloud Insights page via Admin > SugarCloud Insights. Here, they can view storage and license usage information such as the total amount of storage being used across their cloud instances, a breakdown of

the current database and file system storage usage for each cloud instance, the total number of active users counting against their Sugar license, etc. In addition, administrators will have the ability to generate PHP error logs and access logs directly from the page which can help provide useful information when troubleshooting certain issues. For more information, refer to the [SugarCloud Insights Guide](#).

Download Backups

Customers with instances hosted on Sugar's cloud environment may request their backup files for various reasons such as local sandbox development, in-depth analytics, or data auditing. Sugar Support can schedule and provide backups on a one-time or recurring basis, based on your organization's need. For some SugarCloud customers, backup files are available to access and download via the Backups module in Sugar. For more information on downloading your instance's backups, refer to the [Downloading Backups From the Backups Module](#) article.

Notification Settings

For critical events such as major upgrades and maintenance windows, SugarCRM sends an email notification to all system administrator users with a valid email address configured in the SugarCloud instance. Administrators can add additional email addresses for other individuals (e.g. your Sugar partner, IT team members, sales managers) so that they can stay abreast of key events without occupying an administrative license in their instance. For more information on managing SugarCloud communications, refer to the [SugarCloud Policy Guide](#).

Last Modified: 2021-02-25 17:15:09

Team Management

Overview

Team Management is used in Sugar to define permissions and groupings for users. These permissions cover 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. Users can use team settings on specific records to allow different users within Sugar the option to view these given records. Team settings can also

be used as a form of organization, thereby separating records to be associated with specific teams for better tracking. Teams can be based on departments, geographic regions, or whatever else works best in a given organization.

Teams Module Tab

The Teams module tab can be accessed by navigating to the Administration page and clicking "Team Management" in the Users section. Once in the Teams list view, you can click the triangle in the Teams 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 teams you last viewed in the module. Please note that clicking the module tab allows you to access the Teams list view.
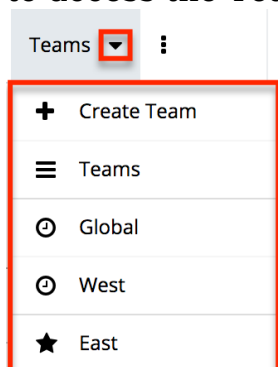
Teams ▼ ⋮

+ Create Team
≡ Teams
⊘ Global
⊘ West
★ East

The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Team	Opens the edit view to create a new team
Teams	Opens the list view layout to search and display teams

Team Types

From an administrative standpoint, teams will be handled differently based on their types. From a user standpoint, all teams will be treated pretty much the same. Each team type has their own special set of characteristics that aid in defining it. The team types defined as:

- [The Global Team](#)
- [Standard Teams](#)
- [Private Teams](#)

The Global Team

The Global team is created automatically when a Sugar instance is created. Global is the default team for all new users, and every user is a member of the team by default. Global is a universal team, so any records associated to the global team will be viewable by the users on this team. The global team is intended to be available for all users and a shared team for all users in Sugar.

Note: You cannot delete the Global team.

Standard Teams

Standard Teams can be created by administrators via Team Management. These are to be used throughout Sugar to organize and grant access on organizational specifics to your organization. Standard teams are often broken out into groups by departments, geographical regions, or duties. For example, you may have an East and West team, and also a Sales and Support team.

Private Teams

For every user that is created in Sugar, a corresponding private team is automatically created in the Teams module. By default, the private team name is the user's first and last name. A private team name will be updated any time the corresponding user's profile is edited and re-saved, even if the change was not made to the user's first or last name. For example, the private team for Jane Smith will be automatically named "Jane Smith". If the administrator edits private team "Jane Smith" to "Jane Smith-HR", and then user Jane Smith later updates the phone number on her user profile, Sugar will revert the private team name back to the user's first and last name, "Jane Smith".

If your organization plans to edit private team names, you must disable the automatic update feature. Navigate to Admin > System Settings and select the checkbox next to "Prevent private team names from inheriting the user's name fields". For more information on this setting, please refer to the [System](#) documentation.

Note: Private teams are not deleted in the same method as other teams. For more information on deleting private teams, please review the [Deleting Teams](#) section of

this guide.

Team Membership Types

Team memberships are given to users in one of two ways, either by an explicit or implicit membership. Regardless of the type, membership will control what records regular users are able to see. Each membership can be granted in different ways and can constitute different functionality. Team membership is represented in the team's detail view, as well as the user's detail view.

Note: Administrators do not adhere to team security and therefore can see all records.

Explicit team membership is forged when the relationship is defined from either the team's or user's detail view. In addition, explicit relationships are also represented with private team memberships. Explicit memberships, other than private teams, can be removed as necessary from the team's or user's detail view. Explicit memberships will also include membership functionality for actions such as workflows, SugarBPM processes, and inbound email.

Implicit team membership is used for record visibility. Implicit membership relies on the "Reports To" field in the User Profile. When one user reports to another, the hierarchy of the "Reports To" field is kept intact. The user being reported to will inherit the team membership of the subordinate user and be able to see any records on both his or her own team, and the teams of which the subordinate user is a member. The subordinate's teams can either be explicit or implicit teams in this scenario.

Note: Implicit relationships cannot be removed, but the cause for their relationship can be broken by changing the reporting hierarchy.

In the Team's detail view, the user's subpanel will showcase which relationships are explicit and which are implicit. In the "Membership" column of the Users subpanel, the user will either be marked as a "Member", meaning that they are an explicit member, or "Member Reports-to", meaning they are an implicit member. In addition, the users marked with the "Member Reports-to" will not include an "Unlink" button, as they have another user (or users) reporting to them on this team.

Creating Teams

There are two methods that can be used to create teams in Sugar. These are via the Teams module tab's action list or by duplicating an existing team and then editing it. After initially creating the team, the administrator will need to associate users to the newly created team.

For information on creating Private Teams, please review the Repairing Teams section of this documentation.

Creating Via Teams Module

The most common way to create a new team is via the Create Team option in the Teams module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the team.

Use the following steps to create a team via the Teams module:

1. Navigate to Admin > Team Management.
   Note: The Teams list view will open displaying all existing teams that are currently available.
2. Click the triangle in the Teams module tab and select "Create Team".
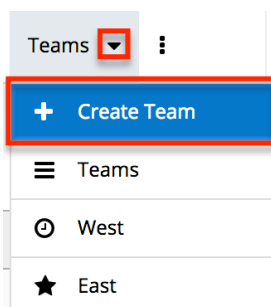
3. Enter a name and description of the team on the edit view screen that you are now presented with.Enter the appropriate values for fields in the edit

view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
4. On the team's detail view, add users that are members of this team.

Creating Via Duplication

You can also create a new team by duplicating an existing team. The Copy option is useful if the team you are creating has a similar set of members or a similar description to an existing team

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

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

Teams: West

Edit ▾
Copy
Delete

Team Name: West
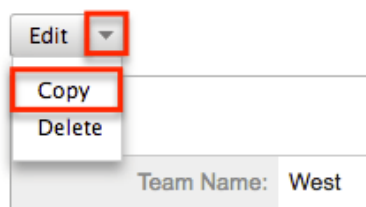
3. The displayed edit view is pre-populated with the original team's values. Update the name field, and description if need be, then click "Save".
4. On the team's detail view, add any users that are members of this team that are not on the original team, and remove any unwanted users.

Adding Users to Teams Via Teams Module

A user has to be associated to a team to be able to view records that are associated to the specific team. Assigning a team is much like any other many to many relationship in Sugar, where many users can be associated to one particular team, and one user can also be assigned to multiple teams. From Team Management, a user can be associated to a team via the Users subpanel at the bottom of the detail view. To associate users to a team, follow the following steps:

1. Navigate to Admin > Team Management
2. From the Teams list view, select the team that you are working with
3. At the bottom of the page, click "Select User" from the Users subpanel
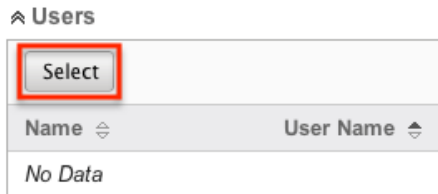
4. Use the popup search menu to search for and select the user(s) you would like to add to this team where you can either click on the user's name or, if selecting multiple users, click their corresponding checkboxes and then click "Select"
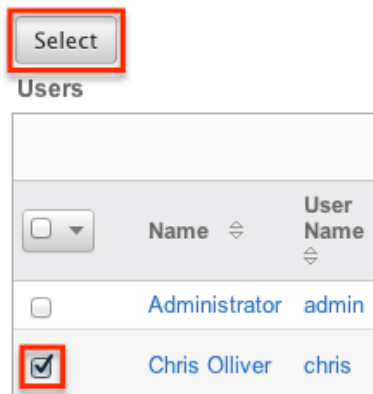
5. After selecting the user(s) the popup search box will close and the user(s) will now be displayed in the Users subpanel for the team to complete the relationship
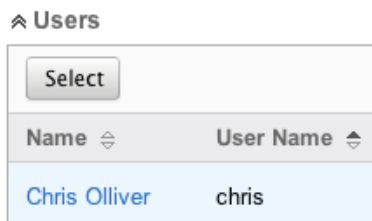
Adding Users to Teams Via Users Module

A regular user must be associated to a team to be able to view records that are associated to that team. Assigning a team is much like any other many to many relationship in Sugar, where many users can be associated to one particular team, and one user can also be assigned to multiple teams. From User Management, a user can be associated to a team via the user's detail view. For more information on User Management, please refer to the [User Management](#) documentation. To associate a team to a user via User Management, follow the following steps:

1. Navigate to Admin > User Management

2. From the Users list view, open the user record that you would like to edit
3. From the user's detail view, click on the "Access" tab
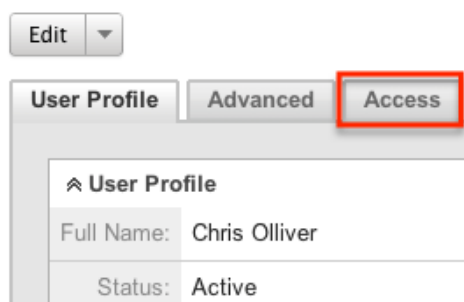
4. Scroll past the role chart to the "My Teams" subpanel and click "Select"
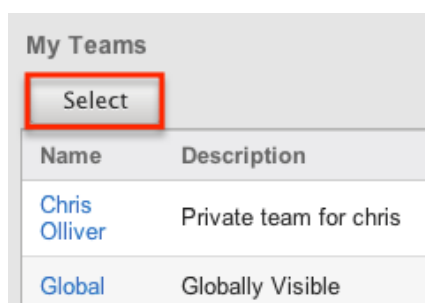
5. Use the popup search menu to search for and select the team(s) you would like to add to this user where you can either click on the team's name or, if selecting multiple teams, click their corresponding checkboxes and then click "Select"
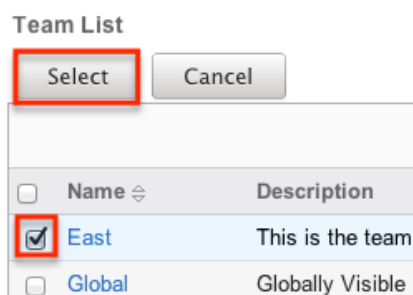
6. After selecting the team(s) the popup search box will close and the team(s) will now be displayed in the My Teams subpanel for the user to complete the relationship

Viewing Teams

There are various options available for viewing team records in Sugar including via the Teams list view, Teams detail view, Teams Last Viewed menu, from dashlets, and from reports.

Viewing Via List View

The Teams list view displays all team records meeting the current search criteria. To access the list view, simply navigate to Admin > Team Management. Alternately, if you are looking at a team's detail view, you can click the Teams module tab to return to the list view. You can click the team's name to open the record in detail view. For more information on viewing teams via list view, please refer to the Teams List View section of this documentation.

Viewing Via Detail View

The Teams detail view displays thorough team information showing the name and description of the team, followed by a subpanel of the users associated to the team. The detail view can be reached by clicking a team's link from anywhere in the application including from the Teams list view. For more information on viewing teams via detail view, please refer to the Teams Detail View section.

Viewing Via Recently Viewed

As you access different teams, Sugar will keep track of which teams you have recently viewed. Click the triangle in the Teams module tab to see a list of the 3 records you most recently viewed in the module. Clicking the record's name within the list will open it in detail view.
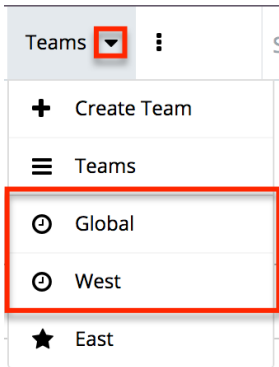
Viewing Via Dashlets

The Home page displays a collection of Sugar Dashlets which allow users to get a quick view of various records, activities, reports, etc. You can view team information in most module specific dashlets. Clicking a team's name from any dashlet will open the team in detail view. For more information on using dashlets, please refer to the [Dashlets](#) section of the Home documentation.

Viewing Via Reports

Administrators have the option to build, run, and manage reports to gather key data from records within Sugar. When building a report, there are options to either run the report from the Teams module or add links to teams related to the records that are being reported on. Once the report is run, you will be able to view the team record's detail view by clicking the team's name in the report results. Please note that you can only directly access team detail views with Rows and Columns and Summation with Details-type reports as Summation and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.

Name: Teams report
Modules: Teams, Teams > Users
Display Columns: Primary Team Name, Private, Description, User Name
Schedule: None
Filters: None

Primary Team Name ⇕	Private ⇕	Description
Administrator ✎	☑	Private team for admin
Jim ✎	☑	Private team for Jim
Global ✎	☐	Globally Visible

Searching Teams

The Teams list view search function searches for the name of the team to help you locate records easily and effectively. Once the search is performed, the relevant results will be displayed in the Teams list view below.

The buttons in the 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

To see all Team records, simply click "Clear" and then "Search" to perform a blank search with no name filter.

Search Teams

Team Name		Search	Clear

☐ ▾ Delete ▾

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. %Administrator). This will pull up any record that has the word "administrator" 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, please refer to the [Search](#) documentation.

Teams List View

The Teams list view displays all teams meeting the current search criteria, if any. You can view the name and description of each team within the field columns. Click on the name of the team to access the [detail view](#) for the team and review the settings further.

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

Teams can be deleted in a mass-delete fashion via the list view by selecting all of the team records. To select individual team records on the Teams list view, mark the checkbox on the left of each row. To select or deselect multiple teams on the list view, use the options in the checkbox dropdown menu:

- **Select This Page** : Selects all records shown on the current page of results
- **Select All** : Selects all records in the current search results across all pages of results
- **Deselect All** : Deselects all records that are currently selected
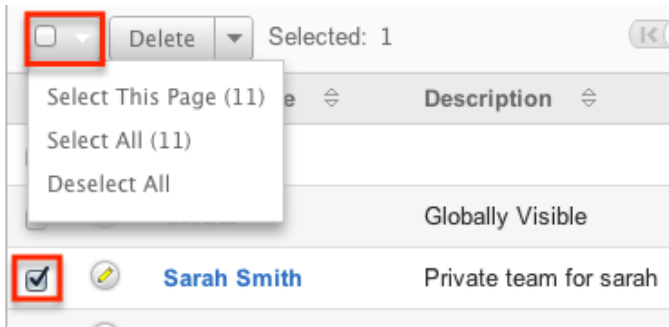
For more information on deleting teams, please refer to the [Deleting Teams](#) section of this documentation.

Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.
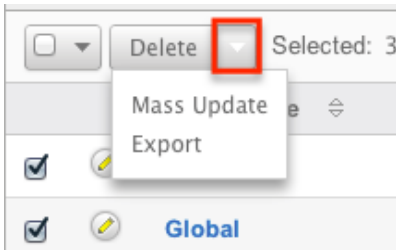
The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Delete	Delete one or more teams at a time
Mass Update	Mass update one or more teams at a time
Export	Export one or more teams to a CSV file

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 for either "Name" or "Description". The list view may be sorted by only one column at a time.

Teams Detail View

The Teams detail view displays thorough information about the team, as well as the ability to perform most actions related to team management. The detail view also includes a Users subpanel where users can be associated to the team and will therefore take on the team's properties.

Actions Menu

The Actions menu on the top left of each team's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the [System](#) documentation in the Administration guide.
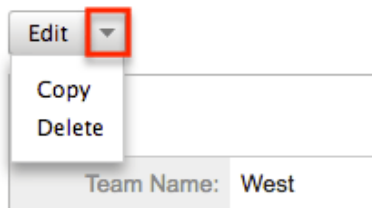
The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit the name and description of this team
Copy	Duplicate this team to create a new team
Delete	Delete this team

Users Subpanel

A user has to be associated to a team to be able to take on the team's membership

settings. Assigning a user is much like any other many to many relationship in Sugar, where many users can be associated to one particular team, and one user can also be assigned to multiple teams. From Team Management, a user can be associated to a team via the Users subpanel at the bottom of the page. To associate uses to a team, follow the following steps:

1. Navigate to the detail view of the team that you would like to edit.
2. At the bottom of the page, click "Select User" from the Users subpanel
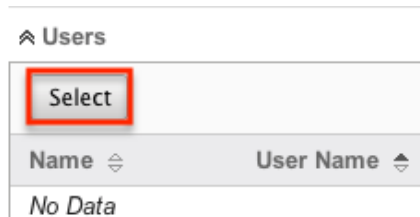
3. Use the popup search menu to search for and select the user(s) you would like to add to this team. You can either click on the user's name or, if selecting multiple users, click their corresponding checkbox and then click "Select"
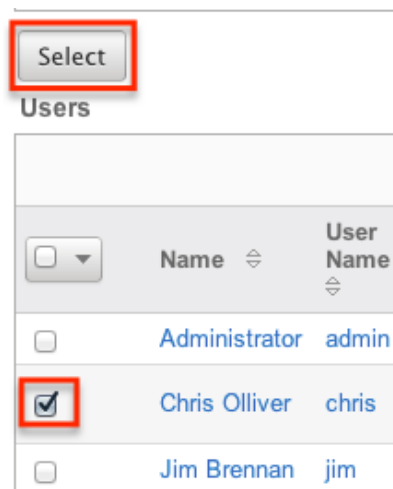
4. After selecting the user(s) the popup search box will close and the user(s) will now be displayed in the Users subpanel for the team to complete the relationship
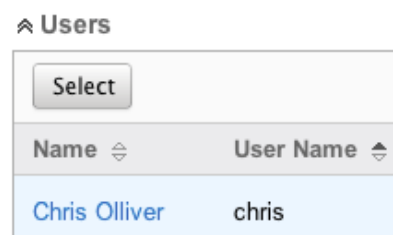
Next or Previous Record

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

Teams: Chris Olliver

Edit ▾

(8 of 11)

Team Name: Chris Olliver

Editing Teams

Teams may be edited at any time to update or add information to the record or to edit existing information. You can make changes to existing team records via the Teams detail view and edit view, or from the Users module. Edit view is available within the Teams module and includes the Name and Detail fields.

Editing Via Detail View

You can edit teams via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update either the Name or Description fields, then click "Save" to preserve the changes made.

Teams: Chris Olliver

Edit ▾

Team Name: Chris Olliver

Description: Private team for chris
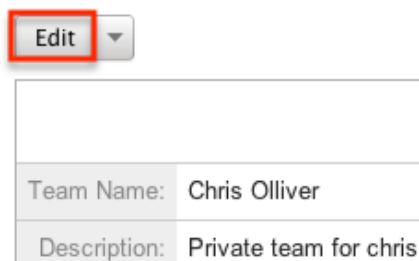
Editing Via List View

You can edit teams via the list view by clicking the Pencil icon to the left of each team's name. After clicking the pencil, the window will move to the edit view. Update the necessary fields, then click "Save" to preserve the changes. After saving from the edit view, you will be returned to the detail view for the record that you just updated. Because this method brings you to the edit view, the Name and Description fields can be updated.
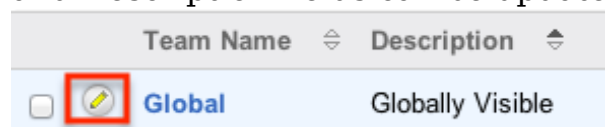
Editing Via Users Module

The Users module allows you to see all of the teams associated with a specific user in one place under the "Access" tab. The page will show the "My Teams" subpanel with a list of all of the teams associated with the user. For more information about viewing the teams from the Users module, please review the [User Management](#) documentation.

On the "My Teams" subpanel, there is an option to edit the team. After clicking the "Edit" button, the window will move to the edit view. Update the necessary fields, then click "Save" to preserve the changes. After saving from the edit view, you will be returned to the detail view for the record that you just updated. Because this method brings you to the edit view, only the Name and Description fields can be updated.

Deleting Teams

If a team record is invalid or is no longer being used in your organization's Sugar instance, it may be deleted from either the Teams 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 team records will not delete any related user records and will only remove the relationship.

The exception to this is found when trying to delete any private teams. Private teams are only able to be deleted when the user that the team is for has been deleted. To delete a private team, first delete the user via the user's detail view, following the steps from User Management.

Deleting Via Detail View

Use the following steps to delete a team via the detail view:

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

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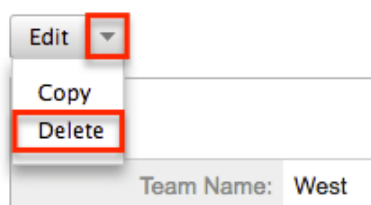
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Deleting Via List View

Use the following steps to delete one or more teams via the list view:

1. Navigate to the Teams list view by navigating to Admin > Team Management.
2. Use the Search functionality to search to find the Team records you wish to delete.
3. Select the desired team records individually or using the checkbox dropdown's options.
4. Choose "Delete" from the Actions menu.
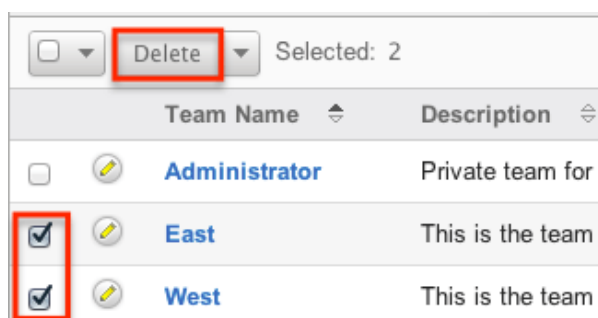
5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.
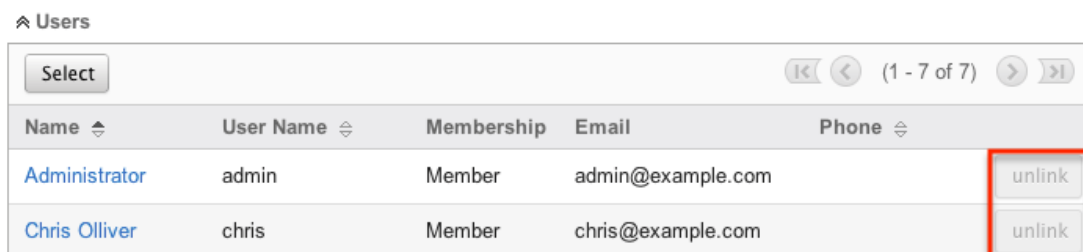
Due to PHP memory limitations on the server, there may be occasions when the application times out while deleting a large number of team records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Removing Users From Teams

Users can be associated to multiple teams, and one team can also be associated to many users. As changes occur within an organization, there may be times that users need to be removed from specific teams. Breaking the relationship between a team and a user can be done both from the Teams detail view and from the Users detail view. Both modules include a subpanel to represent the relationship to the other module.

To remove a user from a team, use the following steps:

1. Navigate to the team record's detail view
2. Click "unlink" to the right of the user's row

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

To remove a team from a user, use the following steps:

1. Navigate to the user's detail view
2. From the user's detail view, click on the "Access" tab

Chris Olliver

Edit ▼

| User Profile | Advanced | Access |

3. Scroll past the role chart to the "My Teams" subpanel and click "Remove" on the row of the team you would like to remove

My Teams

Select

Name	Description		
Chris Olliver	Private team for chris		edit
East	This is the team for the East		edit remove
West	This is the team for the West		edit remove
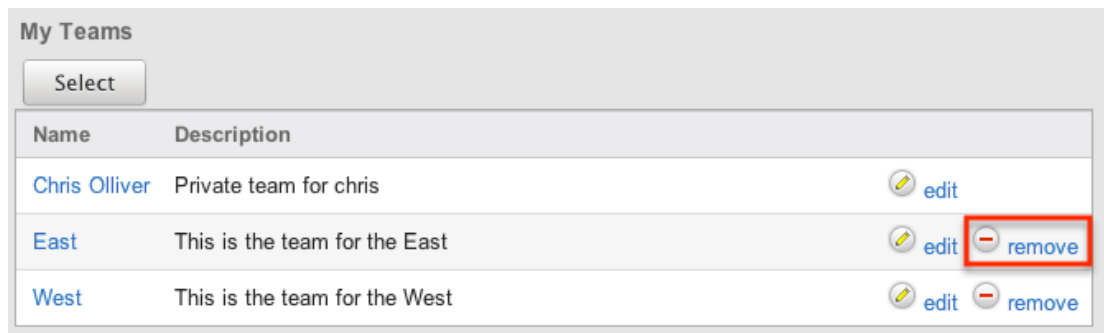
4. A pop-up message will display asking for confirmation. Click "Ok" to proceed

Repairing Teams

Sugar's Repair menu includes two options for administrators to improve team structures and functionality. These processes should not be needed often, and are only used when the necessary changes are to be made. The repair options are as follows:

Type	Description
Upgrade Teams	Checks to make sure that all users have associated private teams
Repair Teams	A combination of four different repair functions to rebuild team accesses

Last Modified: 2020-11-30 17:17:29

Role Management

Overview

Roles in Sugar determine which users can access modules as well as which operations the users are allowed to perform within those modules. When configuring role settings in Sugar, an administrator may choose to enforce restrictions for entire modules or for selected fields on the records in a module, as explained in the following sections. To fully leverage Sugar's security model, both permission types can be used together for a given role and should be considered in conjunction with the Team Management settings used by your organization.

Administrators have the ability to create different roles and assign regular users to the roles. A user can be related to any number of roles, and when multiple roles or role settings are applied, Sugar adheres to a most-restrictive policy to determine the user's appropriate access levels. Administrators cannot be related to roles, as their administrative rights supersede any restrictions imposed by Role Management. For more information on System Administrator users, please review the User Management documentation.

Roles control multiple layers of actions and access for users within Sugar:

- Module-Level Permissions
- Field-Level Permissions

Exceptions

The following modules respond uniquely to role settings in Sugar:

- **Forecasts Module** : For the Forecasts module, roles will allow or deny access at the module level with no further layers of access. Because the Forecasts module uses data from the Opportunities, Products, Quotas, Worksheet and Time Period modules, the Forecasts module does not respect the module- or field-level ACLs for those modules. For example, the opportunity data that is shown in the Forecasts module worksheets will be displayed and editable regardless of whether or not the user has access to the Opportunities module or has field-level restrictions in that module.
- **Reports Module** : Sugar's Reports module does not respect certain field-level role restrictions, meaning that generated reports may display field data for which a user's role is set to restrict visibility.

Roles Module Tab

The Roles module tab can be accessed by navigating to the Administration page and clicking "Role Management" in the Users section. Once in the Roles list view, you can click the triangle in the Roles 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 roles you last viewed in the module. Please note that clicking the module tab allows you to access the Roles list view.
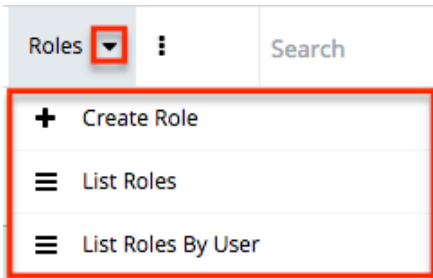
The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Role	Opens the edit view to create a new role
List Roles	Opens the list view layout to search and display roles
List Roles By User	Opens a page for viewing each user's access according to their combined roles

Creating Roles

Sugar's roles specify which users can access modules, as well as which operations the users are allowed to perform within those modules. When configuring role settings in Sugar, an administrator may choose to enforce restrictions for entire modules or for selected fields on the records in a module, as explained in the following sections. To fully leverage Sugar's security model, both permission types can be used together for a given role and should be considered in conjunction with the team access settings used by your organization.

Creating Roles via Role Management

The most common way to create a role is via the Create Role option in the Role Management module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the role.

Use the following steps to create a role via Role Management:

1. Navigate to Admin > Role Management.
     ◦ **Note**: The Roles list view will open displaying all existing roles that are currently available.
2. Click the triangle in the Roles module tab and select "Create Role".
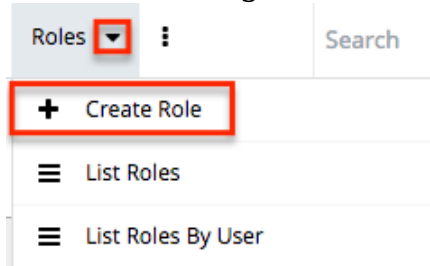
3. Enter the appropriate values for fields in the edit view layout. All required fields will indicate "Required" in the field and must be completed prior to saving.
4. On the Role Chart screen, configure the module and field permissions, and assign users to the role.

Creating Roles via Duplication

You can also create a new role by duplicating an existing role. The duplicate option is useful if the role you are creating has similar information to an existing role.

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

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

3. The displayed edit view is pre-populated with the original role's values. Update the necessary fields, then click "Save".
4. On the Role Chart screen, update the module and field permissions, and assign users to the role.

Setting Module-Level Permissions

Sugar's Role Chart contains ten columns and has a row for each module down the left-hand side. The columns represent an access level or a type of operation within Sugar, and the corresponding points between the columns and module rows define the role's permission setting for the operation within the given module.

	Access	Access Type	Delete	Edit	Export	Import	List	Mass Update	Record View
Accounts	**Enabled**	**Admin & Developer**	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Bugs	**Enabled**	**Admin & Developer**	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Business Centers	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set

To configure or make changes to a role, follow the steps below:

1. On the Role Chart, find the intersection of the operation and the module that you would like to adjust and click inside the corresponding table cell.
2. A dropdown list displays the options available for that configuration. Select the appropriate security option based on the [access and operation definitions](#) explained later on this page.

3. Repeat steps 1 and 2 for any other fields you would like to change in this module for the current role.
4. When complete, click "Save" to secure the changes.

Note: The most restrictive role setting always takes precedence when Sugar has to choose between two or more settings.

The following table explains the Role Chart's components in detail. Please scroll [beyond this table](#) for descriptions of each configuration option.

Role Chart Column Header	Configuration Options	Description	Additional Comments
Module (blank header row)	N/A	Identifies which module the row's settings will affect	

Access	• Enabled • Not Set • Disabled	Controls access to the entire module for users in this role	When access to a module is disabled, the user is prohibited from viewing any records in this module. They cannot see a tab for the module in the navigation bar, and other module records do not reveal this module's subpanel to the user. For more information, please refer to the Module Access definitions below this table.
Access Type	• Normal • Not Set • Admin • Developer • Admin & Developer	For enabled modules, Access Type determines how much control users in this role have over the module	Please refer to the Module Access Type definitions below this table.
Delete	• All • Owner • Not Set • None	Restricts users from deleting or merging records in this module	Restricting a user's ability to delete records also restricts a user's ability to merge records in the module since merging results in deleting one or more records.
Edit	• All • Owner • Not Set • None	Restricts users from editing, creating, or merging records in this module	Although it is labeled "Edit", this role setting also affects the Create functionality because the process of creating a record functions

			the same way as editing. It also restricts the merge functionality in Sugar, which modifies existing records.
Export	• All • Owner • Not Set • None	Restricts users from exporting data from this module to their local computers	This role setting affects usage of the Sugar API, which is the framework used for external connections, such as the Outlook Plug-in. For more information on exporting, please refer to the [Export](#) documentation in the Application guide.
Import	• All • Not Set • None	Restricts users from importing data into this module	This role setting affects usage of the Sugar API, which is the framework used for external connections, such as the Outlook Plug-in. For more information on importing, please refer to the [Import](#) documentation in the Application guide.
List	• All • Owner • Not Set • None	Restricts a user's ability to see records in a list view or subpanel	A module's list view is not visible to users where "List" is set to "None".
Mass Update	• All • Not Set • None	Restricts users from using the Mass Update functionality in this module's list view	The Mass Update option is not visible on the list view's Actions menu when "Mass Update" is

			set to "None". If "List" is set to "None", the Mass Update configuration is inconsequential. To entirely prohibit users in a role from updating many records at once, set "Import" to "None" as well to prevent mass updates via import.
Record View	• All • Owner • Not Set • None	Restrict access to the record view which displays an individual record's details	When "Record View" is set to "None", the module's list view displays record's names, but the names are not hyperlinked to their corresponding record views like they are for users with the Record View permission enabled. When a module's Record View setting is "None" or "Owner", the access level for "Edit" and "List" must be set to the same value to ensure desired functionality for [Sugar Mobile](#) and other API-based applications.

The following sections explain the various configuration options available in the Role Chart.

Module Access Definitions

The Access column provides the following options:

- **Enabled** : The user can access this module in Sugar.
- **Not Set** : The user is neither restricted nor granted access to this module. When permission is "Not Set", the users within this role default to "Enabled" access.
- **Disabled** : The user cannot access this module, view any of its records, or see any trace of its existence in Sugar.

Module Access Type Definitions

The Access Type column provides the following options:

- **Normal** : The user can perform standard functions in this module barring restrictions from other roles or team settings. The user cannot access the Administration functions for this module.
- **Not Set** : The user is neither restricted nor granted access to this module. When permission is "Not Set", users within this role default to "Normal" access.
- **Admin** : The user is not subject to any [Teams](#) restrictions for this module and can view all records, barring other role restrictions. Admin access also forces "All" access for that module's action-related columns (e.g. Edit, Delete, etc.) if the row's operation-related columns remain "Not Set". However, any more restrictive options you may choose will supersede the Admin access. Please note that the module-level Admin access type does not grant access to the Administration functions for this module.
- **Developer** : The user has access to the module-specific sections of Studio, Workflow Management, Dropdown Editor, and any other Administration functions that are specific to the module. The user's access to Sugar records is not affected; access remains subject to [Teams](#) restrictions and action-related role restrictions for this module. For more information on developer tools, please refer to the [Developer Tools](#) documentation.
- **Admin & Developer** : The user is not subject to any [Teams](#) restrictions for this module and can access Administration functions for this module. For more information, please refer to the descriptions for the "Admin" and the "Developer" access types above.

For more information on Admin, Developer, and Admin & Developer roles, please

refer to the article [Understanding Admin and Developer Access in Roles](#).

Record Operation Definitions
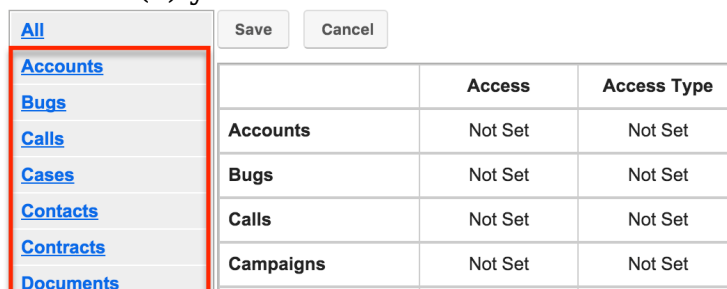
The operation columns (e.g. Edit, Delete, etc.) provide the following configuration options:

- **All** : The user can perform this action on any and all records that they can access in Sugar per their team memberships.
- **Owner** : The user can perform this action only if they are the "Assigned To" user on the record.
- **Not Set** : The user is neither restricted nor granted access to this function. When permission is "Not Set", users within this role default to "All" access.
- **None** : The user cannot perform this action on any records within this Sugar module.

Setting Field-Level Permissions

Role Management also provides the option to set permissions and restrictions on specific fields within modules. To change the field-level permissions for a role, follow these steps:

1. Navigate to Admin > Role Management.
2. Create and save a new role or select an existing role to edit.
3. On the left side of the screen, click on the name of the module that contains the field(s) you would like to restrict.

4. On the next screen, find the field that you would like to restrict and then click inside the table cell to the right of that field name. In this example, click on the words "Not Set" next to the word "Type" to edit access to the Type field.

Note: Some fields may be part of a group and the access setting will affect all of the fields in the group. To see which fields, if any, are in a group with the field you are editing, click the Plus (+) sign next to the field's name. Any fields listed as part of a group will also be restricted at the level you choose. Grouped fields cannot be controlled independently. If you cannot find the field that you would like to restrict in the fields table, it may be grouped within another field. Try expanding fields that are likely to be grouped with the field you are looking for (e.g. the Billing City field for Accounts is grouped under the Billing Street field as part of the billing address group).

5. From the dropdown list, select a level of field access for this role's members based on the [field-access definitions](#) explained below.

6. Repeat steps 4 and 5 for any other fields you would like to change in this module for the current role.
7. When complete, click "Save" to secure the changes.

Field Access Definitions

- **Not Set** : The user is neither restricted nor granted access to this field. When permission is "Not Set", users within this role default to "Read/Write" access.
- **Read/Write** : The user can see the value of this field and can edit it.
- **Read/Owner Write** : The user can see the value of this field but can only edit the field's value if they are the "Assigned To" user on the record.
- **Read Only** : The user can see the value of this field but cannot change its value.
- **Owner Read/Owner Write** : The user can only see and edit this field if they are the "Assigned To" user on the record.
- **None** : For Sidecar modules, the user can see this field on layouts (e.g. Record View) but cannot see its value. Instead, Sugar displays "No Access" as the field's value. For Legacy modules (e.g. Documents), the user cannot see the field on any layout. Instead, Sugar displays a blank space on the

edit and detail views.

Assigning Users to Roles

A user must be associated with a role to take on the role's permission settings. Assigning a role is much like any other many-to-many relationship in Sugar, where many users can be associated with any particular role, and one user can also be assigned to multiple roles.

If a user is assigned to multiple roles, the most restrictive option for each setting is respected. For example, if a user is assigned to two roles, one which restricts Edit access for the Accounts module to "Owner" and the second which restricts editing to "All", the "Owner" setting will be respected. View the Access tab on each user's profile to see the cumulative effect of all of their assigned roles.

Assigning Roles via Role Management

From Role Management, a user can be related to a role via the Users subpanel at the bottom of the detail view. To relate users to a role, use the following steps:

1. Navigate to Admin > Role Management.
2. From the Roles list view, select the desired role.
3. At the bottom of the page, click "Select User" from the Users subpanel.

4. Use the pop-up search menu to search for and select the user(s) you would like to add to this role where you can either click on the user's name or, if selecting multiple users, click their corresponding checkbox and then click "Select".
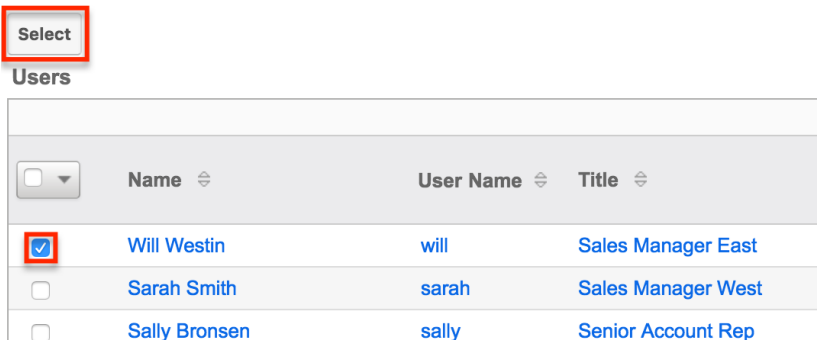
After selecting the user(s), the pop-up search box will close and the user(s) will now be displayed in the Users subpanel for the role to complete the relationship.

Assigning Roles via User Management

From User Management, a user can be related to a role via the user's detail view. For more information on User Management, please refer to the User Management documentation. To relate a role to a user via User Management, follow the following steps:

1. Navigate to Admin > User Management.
2. From the Users list view, open the user record that you would like to edit
3. From the user's detail view, click on the "Access" tab
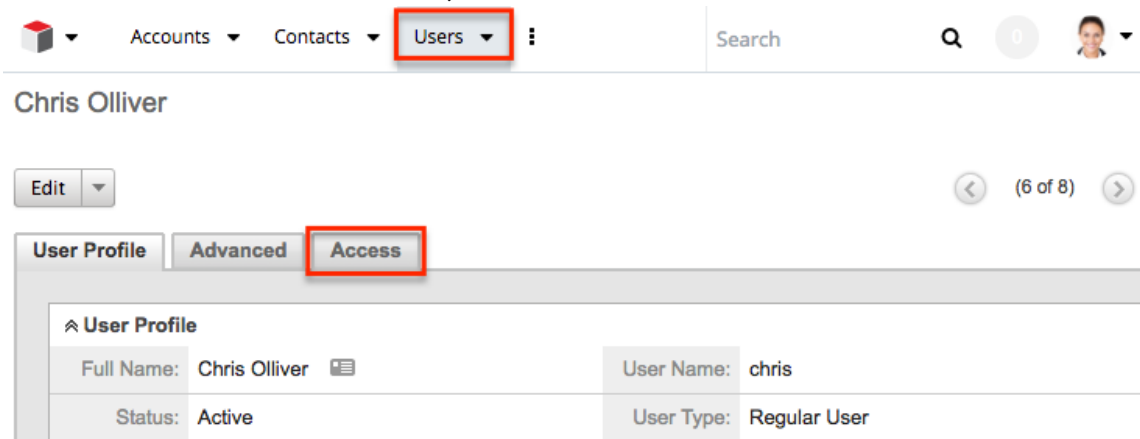
4. Scroll past the Role Chart to the subpanel for "Roles" and click "Select"

5. Use the pop-up search menu to search for and select the role(s) you would like to add to this user where you can either click on the role's name or, if selecting multiple roles, click the corresponding checkboxes and then click "Select"
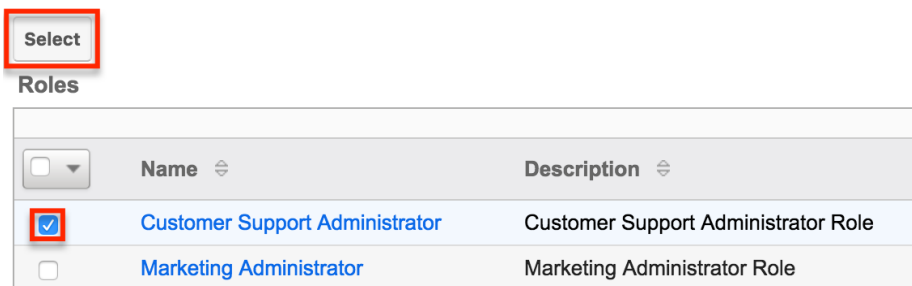
After selecting the role(s), the pop-up search box will close and the role(s) will now be displayed in the Roles subpanel for the user to complete the relationship.

Viewing Roles

There are various options available for viewing role records in Sugar including via the Roles list view, Roles detail view, Roles Recently Viewed menu, the List Roles by User function, and from the Users module.

Viewing via List View

The Roles list view displays all role records meeting the current search criteria. To access the list view, simply navigate Admin > Role Management. Alternately, if you are looking at a role's detail view, you can click the Roles module tab to return to the list view. You can click the role's name to open the record in detail view. For more information on viewing roles via list view, please refer to the Roles List View section of this documentation.

Viewing via Detail View

The Roles detail view is where all of the modifications to the role settings can be made. This page includes the name and description of the role, the chart where module settings can be manipulated, links to the field-level action settings, and the Users subpanel where users can be added to the role. For more information on viewing roles via detail view, please refer to the Roles Detail View section of this documentation.

Viewing via Recently Viewed

As you access different roles, Sugar will keep track of which roles you have recently viewed. Click the triangle in the Roles module tab to see a list of the 3 roles you most recently viewed in the module. Clicking the role's name within the list will open it in detail view.
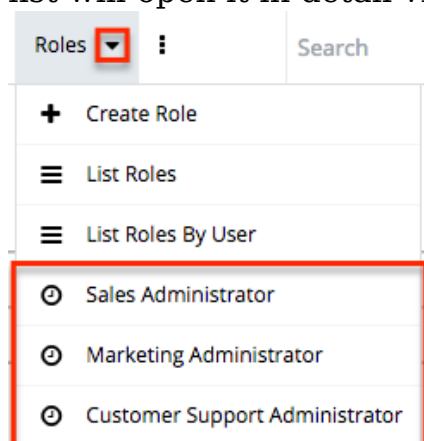
Viewing Roles by User

Role Management offers the option to view all roles assigned to specific users. Click the triangle in the Roles module tab and select "List Roles By User" to view these roles.
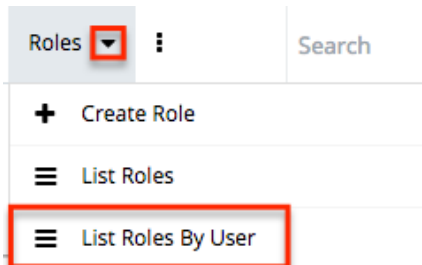
You will be redirected to the [Users](#) module and a screen will appear with a dropdown list with all users' names included. Select the user you would like to view and a chart will show which is a compilation of all of the roles listed for the user in the Roles subpanel, at the bottom of the page.

Viewing via Users Module

User profiles show which roles the user is related to and how the user's roles work together. When viewing a user profile, all role information can be found by navigating to the "Access" tab. For information about accessing the Users module, please refer to the [Users](#) documentation.
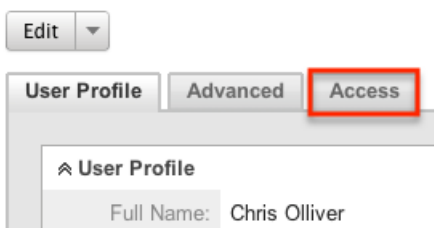
The access tab contains a chart showing all of the modules and actions available in

Role Management. This chart is a compilation of all of the roles listed for the user in the Roles subpanel at the bottom of the page.

Chris Olliver

When viewing the chart, the most restrictive setting for the specific intersection will take precedence, and will represent the option for the user. Therefore, if the user has two roles assigned, one of which allows him or her to delete a record and another which does not, Sugar will enforce the option where the user cannot delete the record. The table shown in User Management cannot be edited. Instead, the role itself must be edited which will change the setting for any other users related to the role.

To view the role settings from User Management and make any necessary changes, simply click the role's name from the Roles subpanel, which will take you to the role's detail view.

Searching Roles

The Roles list view search function allows you to search for the name of the role to help you locate records easily and effectively. Once the search is performed, the relevant results will be displayed in the Roles list view below.

The buttons in the 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

To see all Role records, simply click "Clear" and then "Search" to perform a blank search with no name filter.

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. %Administrator). This will pull up any record that has the word "administrator" 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, please refer to the Search documentation.

Roles List View
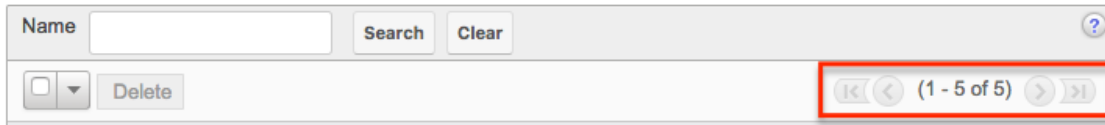
The Roles list view displays all roles that meet the current search criteria (if any). You can view the name and description of each role within the field columns. Click on the name of the role to access the [detail view](#) for the role and review the settings further.

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 the System menu in Admin. For more information on changing the number of displayed records, please refer to the [System](#) documentation in the Administration Guide.

Checkbox Selection

Roles can be deleted in a mass-delete fashion via the list view by selecting all of the role records. To select individual role records on the Roles list view, mark the checkbox on the left of each row. To select or deselect multiple roles on the list view, use the options in the checkbox dropdown menu:

- **Select This Page** : Selects all records shown on the current page of results
- **Select All** : Selects all records in the current search results across all pages of results
- **Deselect All** : Deselects all records that are currently selected
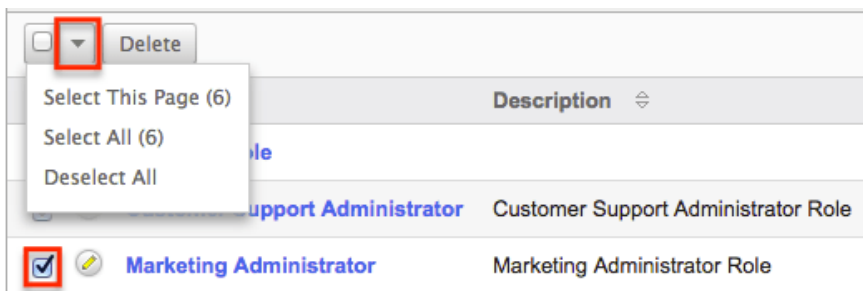
For more information on deleting roles, please refer to the [Mass Deleting via List View](#) section of this documentation.

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 for either "Name" or "Description". The list view may be sorted by only one column at a time.
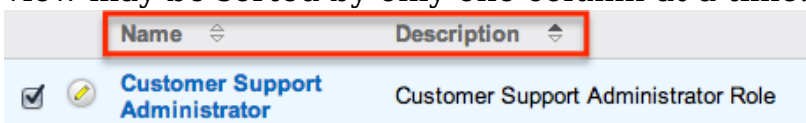
Roles Detail View

The Roles detail view displays thorough information about the role, as well as the ability to perform most actions related to role management. It comprises of a chart showing all modules in Sugar and actions that the user can have access to or be restricted from. The detail view also provides links that, when clicked, drill down into each module to make field-level permission changes. Finally, the detail view includes a Users subpanel where users can be related to the role and will, therefore, take on the role's properties.

Actions Menu

The Actions menu on the top left of each role's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration Guide.
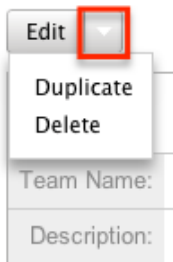
The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit the name and description of this role
Duplicate	Duplicate this role to create a new role
Delete	Delete this role

Role Chart

The Role Chart comprises of ten columns and a row for each module down the left-hand side. The columns each represent a type of action within Sugar, and the corresponding point between the columns and module roles defines the role's permissions. The role permissions can be updated from the detail view of each role. For an explanation of each action and how to update roles, please review the

[Setting Module-Level Permissions](#) section of this documentation.

	Access	Access Type	Delete	Edit	Export	Import	List	Mass Update	Record View
Accounts	Enabled	**Admin & Developer**	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Bugs	Enabled	**Admin & Developer**	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Business Centers	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set

Field Permissions

To the left of the Role Chart is a list of hyperlinked Sugar module names:

Click on a module name to access the Field Permissions view for the module. For an explanation of each action and how to update field-level permissions, please review the [Setting Field-Level Permissions](#) section of this page.

Users Subpanel

Beneath the Role Chart, the Users subpanel is available for the Administrator to relate one or more users to the current role. A user must be related to a role to take on the role's permission settings. One user can be related to multiple roles. If a user is related to multiple roles, the most restrictive option for each setting is respected.

To relate users to a role, use the following steps:

1. Navigate to the detail view of the role that you would like to edit.
2. At the bottom of the page, click "Select User" from the Users subpanel.

3. Use the pop-up search menu to search for and select the user(s) you would like to add to this role. You can either click on the user's name or, if selecting multiple users, click their corresponding checkbox and then click "Select".
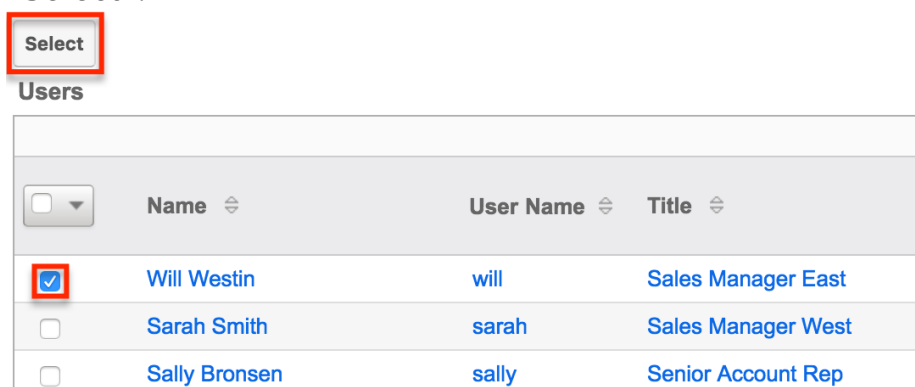
After selecting the user(s), the pop-up search box will close and the user(s) will now be displayed in the Users subpanel for the role to complete the relationship.

Editing Roles

Roles may be edited at any time to update or add information to the record or to edit the role restrictions. You can make changes to existing role records via the Roles detail view and edit view, depending on the change being made. Changes via the detail view are made directly on the role permission chart. Edit view is available within the Roles module and includes the Name and Detail fields.

Editing via Detail View

You can edit roles via the detail view by clicking the Edit button on the upper left of the page. Once the edit view layout is open, update either the Name or Description fields, then click "Save" to preserve the changes made.

Edits to the settings on the role are also performed via the detail view. Below the Name and Description fields, is where you will find the role permission chart. This chart is made up of rows representing the different modules in Sugar, and columns representing each of the action types Sugar users can perform. Edits to this table are made by clicking the box at the intersection of a row and column, which produces a dropdown list of available options. For more information on module permission changes, please review the information in the [Setting Module-Level Permissions](#) section of this documentation.

Editing via List View

You can edit roles via the list view by clicking the Pencil icon to the left of each role's name. After clicking the pencil, the window will move to the edit view. Update the necessary fields, then click "Save" to preserve the changes. After saving from the edit view, you will be returned to the detail view for the record that you just updated. Because this method brings you to the edit view, only the Name and Description fields can be updated.

Editing via Users Module

The Users module allows you to see all of the roles related to a specific user in one place under the "Access" tab. The page will show a subpanel with a list of all of the roles related to the user. For more information about viewing the roles from the Users module, please review [Viewing via Users Module](#).

On the "Roles" subpanel, there is an option to edit the role. After clicking the "Edit" button, the window will move to the edit view. Update the necessary fields, then click "Save" to preserve the changes. After saving from the edit view, you will be returned to the detail view for the record that you just updated. Because this method brings you to the edit view, only the Name and Description fields can be updated.

Deleting Roles

If a role record is invalid or is no longer being used in your organization's Sugar instance, it may be deleted from either the Roles 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 role records will not delete the related user records and will only remove the relationship.

Deleting via Detail View

Use the following steps to delete a role via the detail view:

1. Navigate to the role record's detail view.
2. Select "Delete" from the Actions menu.
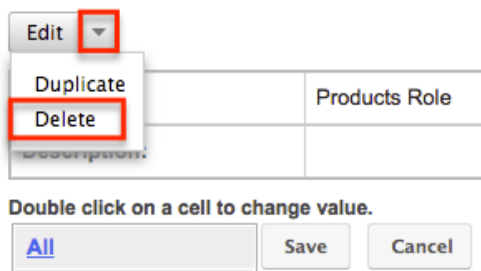
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting via List View

Use the following steps to delete one or more roles via the list view:

1. Navigate to Admin > Role Management.
2. Use the search functionality to find the Role records you wish to delete.
3. Select the desired role records individually or using the checkbox

[dropdown's](#)options.

4. Choose "Delete" from the Actions menu.

	Name ⇕	Description ⇕
☑ 🖉	**Customer Support Administrator**	Customer Support Administrator Role
☑ 🖉	**Marketing Administrator**	Marketing Administrator Role
☐ 🖉	**Sales Administrator**	Sales Administrator Role

5. A pop-up message will ask 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 role records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Last Modified: 2020-12-09 17:57:59

Password Management

Overview

Password Management is used to administer requirements and other policies about user passwords in Sugar. Sugar allows administrators to set up system-generated passwords versus manually created passwords for new users, failed login lockout attempts, and configure the email templates used to send password information to users. Password management is not used to change user's passwords, which can be done via their [User Profile](#).

Note: For instances that use SugarIdentity, an administrator will need to access [SugarIdentity](#) via the SugarCloud Settings console to configure [password requirements](#) as well as set up [LDAP](#) or [SAML](#) authentication.

Password Requirements

The Password Requirements panel lets you configure minimum and maximum lengths of passwords, as well as what characters are required in passwords. Filling in either of the first two fields, Minimum Length and Maximum Length, will force a requirement for your users to have passwords be more than or less than a given

amount of characters. Additionally, use any of the four checkboxes to force character requirements on users' passwords. This can force users to include upper case letters, lower case letters, numbers, or special characters in their passwords.

Note: For instances that use SugarIdentity, password requirements are configured in SugarIdentity via the SugarCloud Settings console.

Advanced Options

You can also specify words or other strings that are not allowed in a password, called Regex Requirements. The configurations for Regex Requirements are found in the Advanced Options section of the Password Requirements panel.

Note: For instances that use SugarIdentity, regex password controls are not available.

To set a Regex Requirement, type in code of characters that are not allowed. In the Regex Description field, write a message to users that will show when they try to edit their passwords, explaining what strings are not allowed. For more information on Regex usage, please review the Regular Expressions website at http://www.regular-expressions.info/.

Some examples of regular expressions in password rules are listed below:

Sample Expression	Password Rule
Sugar	Password cannot contain the word Sugar.

([A-Za-z0-9])\1	Password cannot repeat a letter or number consecutively; for example, AA or 88.
([a-zA-Z]){4,}	Password cannot repeat any two consecutive letters; repeat characters or letters must be separated by a special character such as %.
[\t]	Password cannot contain spaces and tabs.
[@#$]	Password cannot contain @, #, or $.

System-Generated Passwords

When enabled, the System-Generated Passwords feature will allow users to receive a randomly generated password via email. This functionality is utilized either when a new user is created or when an administrator activates the Reset Password button in the user's profile.

Note: For instances that use SugarIdentity, the System-Generated Passwords feature is not available.

The two requirements to utilize system-generated passwords are:

- A user has a valid primary email address configured in their User Profile.
- A system outbound email server (SMTP) is configured in Email Settings.

For security reasons, when the System-Generated Passwords feature is enabled, you also have the option to set an expiration for the system-generated password. You can specify when the temporary password expires, either after a certain amount of days, months, or weeks, or after a specified number of logins. Simply click the radio button next to the expiration you would like to use and enter the login or length of time variable as necessary, or click "None" for the password to never expire. Once the temporary password expires, users will see a message upon login, informing them that the password has expired and to create a new password. The user will need to enter the temporary password along with the new password and confirm the password as well.

User Reset Password

The forgot password feature allows administrators to enable the Forgot Password link to display in the Sugar login window. If a user does not remember their password, they can click this option, enter their user name and their primary email address in Sugar, and a Reset Password link will be emailed, guiding them through the process to reset their forgotten password. For more information on how a user resets his or her password, please view the Getting Started documentation.

Note: For instances that use SugarIdentity, the "Forgot Password?" link is available on the Sugar login screen, but the feature cannot be configured.

The two requirements to utilize Forgot Password feature are:

- A user has a valid primary email address configured in their User Profile.
- A system outbound email server (SMTP) is configured in Email Settings.

CAPTCHA Validation

As an additional precaution, you can enable CAPTCHA validation to prevent automated programs from gaining unauthorized access to user accounts. When enabled, when a user attempts to use the Forgot Password feature, they will have to confirm a CAPTCHA, in addition to providing their user name and primary email address.

Note: For instances that use SugarIdentity, CAPTCHA validation is not available.

Use the following steps to enable CAPTCHA for the Forgot Password menu:

1. Create an account with reCAPTCHA from the reCAPTCHA website at https://www.google.com/recaptcha.
2. After creating an account, save your Public Key and Private Key, which will be entered into Sugar.
3. In Sugar, navigate to Password Management and the "User Reset Password" panel.
4. Click the checkbox to "Enable reCAPTCHA Validations".
5. Enter the Public Key and Private Key in the fields provided.

Honeypot Validations

Honeypots are a nonintrusive method of human form submission confirmation that is more effective than traditional CAPTCHA. Enabling the honeypot validation option will add an invisible input field to the Forgot Password form which only bots reading the HTML will be able to see. When the bots fill in the honeypot field, Sugar knows to disregard the submission since it was not created by a human, thus preventing unauthorized access to your Sugar instance.

Note: For Sugar instances that use SugarIdentity, Honeypot validation is not available.

Email Templates

Sugar comes standard with two password templates. One is for the [System-Generated Password](#) emails that are sent out, and the other is for the [Reset Password](#) email. The templates are editable through Password Management and new ones can also be created. To create a new version of either template, click the Create button on the specific line. To edit the existing template, click the Edit button on the specific line.

Note: For instances that use SugarIdentity, email templates cannot be created or edited.

Templates can also be viewed via the Emails module by navigating to the Email Templates list view. The templates are easily found as the Type is blank, whereas any other template will be either a Campaign, Email, or Workflow template. For more information on [Email Templates](#), please review the appropriate section of the application guide.
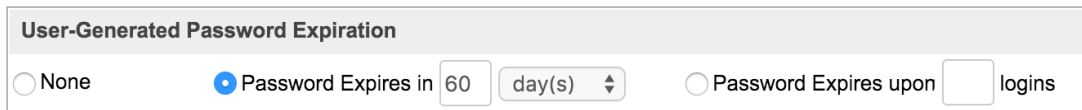
Note: If you choose to create your own templates to send passwords, copy the variables provided in the default template. The variables "$contact_user_link_guid" from the "Forgot Password Email" and the " $contact_user_user_hash" and "$config_site_url" are not available from the variable dropdowns when creating the templates.

User-Generated Password Expiration

Sugar can force users to create new passwords after a given period. Admins can configure this for either specific amounts of time in days, weeks, or months, or after a specific amount of logins. To configure a password expiration, select the radio button next to the expiration period you would like to use and enter the timeframe or amount of logins that the user will be allotted. Once the password expiration is reached, users will see a message upon login, informing them that their password has expired and to create a new password. The user will need to enter their current password along with their new password and confirm the password as well.

Note: For instances that use SugarIdentity, password expiration rules are configured in SugarIdentity via the SugarCloud Settings console.

Login Lockout

To prevent against unauthorized logins, Sugar includes a configurable lockout function. This means that you will define a specific amount of unsuccessful attempts that a user name can be used to log in before the user name will not be able to log in. You also configure a given amount of time before the restriction is listed in either minutes, hours, or days. To configure Login Lockout, click the radio button next to "Lockout users after {blank} unsuccessful login attempts", fill in the maximum number of attempts allowed and define the timeframe.

Note: For instances that use SugarIdentity, login lockout rules are configured in SugarIdentity via the SugarCloud Settings console.

Note: When a user has been locked out, the user must wait until the given timeframe has passed. The only way to manually allow a user to log back in is by clicking the Reset User Preferences button in the user's profile.
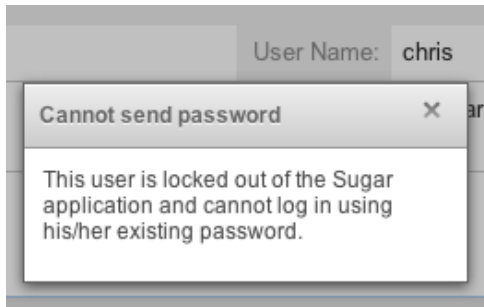
External Authentication

Sugar can respect external authentication protocols (i.e. LDAP and SAML) to give users a seamless login process via single sign-on (SSO) services. LDAP and SAML configuration options are located in the last two panels of the Password Management page. Click the checkbox next to the external authentication type that you would like to enable. Upon selection, the page's contents will refresh and the chosen protocol will supersede any other Password Management settings.

Note: For instances that use SugarIdentity, LDAP and SAML authentication are configured in SugarIdentity via the SugarCloud Settings console.

Note: If a user logs out of their single sign-on account from outside of Sugar, they will continue to be logged into Sugar.

The following sections explain LDAP and SAML options in more detail.

Note: Team Management and Role Management are still taken into account when External Authentication is active.

LDAP

Sugar can be configured to accept Lightweight Directory Access Protocol (LDAP) authentication if your organization has implemented LDAP or Active Directory authentication. When users in your system attempt to log into Sugar, the application will authenticate their credentials against your LDAP directory or

Active Directory. If authentication is successful, the user is granted access to Sugar. If the authentication is unsuccessful, Sugar will then attempt to verify the provided credentials against its own database of valid user names and passwords. Please note that for instances that use SugarIdentity, LDAP is configured in SugarIdentity via the SugarCloud Settings console.

To configure LDAP, navigate to Admin > Password Management, and enable the "Enable LDAP Authentication" checkbox in the LDAP Support panel. Sugar will then display some additional fields where you can enter information specific to your LDAP or Active Directory account.

Once you have completed the form, you will then need to enable LDAP for users by navigating to Admin > User Management, selecting the desired user, then clicking the Advanced tab in their user profile. Enable the "LDAP Authentication Only" checkbox then click "Save". Sugar will then synchronize the user's Active Directory user name and present the password on the LDAP port. When the user next logs into Sugar, they will enter their Active Directory username and password.

LDAP Fields

Fill in the appropriate options in the following fields, and then click "Save" to commit the changes. The following are suggested values for each field, but these may vary depending on your LDAP configuration.

Field	Suggested Values	Description
Authentication	Enter "username@MYSERVER.MYDOMAIN.com" or "domain\\userfirstname.userlastname" for the User Name, and the corresponding Password. **Note**: The latter username format requires double backslashes after the	Check this box to enable the User Name and Password fields. **Note**: You must add a service account user (read-only access) to your Active Directory to authenticate via Sugar.

	domain. Sugar will automatically remove one backslash upon Save.	
Auto Create Users	Typically, this box remains disabled.	Select this checkbox to create the username in the Sugar database if it does not already exist. **Note**: When enabled, a Sugar user is created for every LDAP user logging into the application. This will occupy an active Sugar license for each created user.
Bind Attribute	For Active Directory, enter userPrincipalName	A case-sensitive value
Enable LDAP Authentication		Uncheck this box if you would like to disable LDAP in your instance.
Encryption Key		If you are using LDAP with SOAP, enter the encryption key to encrypt user passwords in the [Sugar Plug-in for Microsoft Outlook](#). **Note:** The "php_mcrypt" extension must be enabled in the php.ini file.
Group Membership	**Group DN :** Enter the group DN name • ou=groups • dc=example • dc=com **Group Name :** Enter the group name • cn=sugarcrm **User Attribute :** A unique identifier used to check if	Select this checkbox if you wish to specify that the user is a member of a specific group.

	the user is a member of the group • uid **Group Attribute :** The attribute of the group that will be used to filter against the User Attribute • MemberUid	
Login Attribute	For Active Directory, enter sAMAccountName	A case-sensitive value
Port Number	389	Enter the port number. 389 is the default port. If you are using a secure TLS connection, the default is 636.
Server	MYSERVER.MYDOMAIN.com	Enter the FQDN of your Active Directory Server which should be your Domain Controller.
User DN	ou=people, dc=example, dc=com	Enter the user DN name.
User Filter	is_user_id=1	Enter any additional parameters to apply when authenticating users.

SAML

Sugar can be configured to accept Security Assertion Markup Language (SAML) for single sign-on if it is implemented at your organization. When users in your system attempt to log into Sugar, the application will authenticate them against SAML. If authentication is successful, the user is granted access to Sugar. If the authentication is unsuccessful, Sugar will then attempt to verify the provided credentials against its own database of valid user names and passwords. Sugar supports the use of SAML version 2.0.

Note: For instances that use SugarIdentity, [SAML](#) is configured in SugarIdentity

via the SugarCloud Settings console.

Use the following steps to configure SAML authentication:

1. Navigate to Admin > Password Management and click the "Enable SAML Authentication" checkbox in the SAML Authentication panel.
2. Enter appropriate values in the fields on the SAML Authentication page. If you have downloaded a metadata file from the identity provider (e.g. Okta, Google, ADFS), then skip to step 3.

3. If you have obtained a metadata file from the identity provider (e.g. Okta, Google, ADFS), then you can import the file by clicking the "Import IdP Metadata File" button. Locate the metadata file you saved then click "Open". Certain fields (e.g. Login URL, SLO URL, Entity ID, X509 Certificate) on the page will be auto-populated with data from the file. Optionally, complete any other desired fields on the configuration page based on your needs.

Note: If you are using Okta with single logout enabled, then you will need to complete the "Sign Logout Request", Request Signing Private Key", and "Request Signing Certificate" fields in order to digitally sign the logout request.
4. Once the necessary fields have been completed, click "Save" to preserve the settings.

When using ADFS, you will need to export an XML metadata file containing the SAML settings which you will need in order to configure a new trust relationship between Sugar and ADFS to allow communication between the two services. Simply click the "Export Metadata File" button to download the necessary file. Please note that you will only be able to export a file if the required fields have been completed and saved. Once you have the metadata file, follow the steps in the [Configuring SSO With Active Directory's ADFS](#) article to configure a new ADFS trust relationship.

SAML Fields

The available fields to configure on the SAML Authentication page are as follows:

Field	Description
Enable SAML Authentication	Uncheck this box if you would like to disable SAML Authentication in your instance.
Login URL	Enter the SAML URL for authentication. **Note**: This is the path to the SAML server to which you are authenticating.
SLO URL	Enter the single logout endpoint to which Sugar will send logout requests. When Sugar sends a logout request to the identity provider (e.g. Okta), it will extend that request and terminate active sessions for all other service providers that are sharing the session established via SAML. **Note**: Single logout requests can be initiated from either the identity provider or Sugar.
Entity ID	Enter a valid URI for the IdP (identity provider) entity. **Note**: Sugar will only accept SAML assertions from this ID.
SugarCRM Entity ID	Enter a valid URI for the service

	provider entity.
X509 Certificate	Enter the SAML X509 certificate public key.
Auto-create user	Check this box to automatically create a new username in the Sugar database if it does not already exist. When enabled, a new Sugar user is created for every SAML user logging into the application. **Note**: This will occupy an active Sugar license for each created user.
Load login screen in same window to avoid pop-up blocking	Enable this option to load the SAML login screen in the current window to prevent pop-up blockers from preventing single sign-on.
Request Signing Private Key	Upload the PEM file containing the private key to be used to sign the AuthN and Logout requests. **Note**: The private key must be uploaded in order to sign the logout request, logout response, and/or AuthN request.
Request Signing Certificate	Upload the CRT file containing the X.509 certificate to be used to sign the AuthN and Logout requests. **Note**: The certificate should match the uploaded private key.
Request Signing method	Select the digital signing method for the logout request, logout response, and/or AuthN request. The recommended options are either "RSA-SHA256" or "RSA-SHA512".
Sign AuthN Request	Check the box to sign the AuthN request using the private key and certificate. **Note**: The "Request Signing Private Key", "Request Signing Certificate", and "Request Signing method" fields must be completed in order to sign the AuthN request.
Sign Logout Request	Check this box to sign the logout request using the private key and certificate. **Note**: The "Request Signing Private Key", "Request Signing Certificate", and "Request Signing method" fields must

	be completed in order to sign the logout request.
Sign Logout Response	Check this box to sign the logout response using the private key and certificate. **Note**: The "Request Signing Private Key", "Request Signing Certificate", and "Request Signing method" fields must be completed in order to sign the logout response.

If you are using OneLogin, please ensure that only the email address user field is mapped to Sugar's email address field in OneLogin's parameters configuration. Mapping to other fields such as user name is not supported and may prevent authentication.

Note: You must disable the [Forgot Password](#) option if you are using SAML authentication.

Setting User Passwords

Administrators have the option to manually set or reset user's passwords as need be. Setting a regular user's password is done simply through the Users module via Admin > User Management. This method will vary depending on the [System-Generated Passwords](#) option. For more information on changing a user's password from the Users module, please review the [Resetting User Passwords](#) section of the Users documentation.

Note: For instances that use SugarIdentity, administrators will not be able to manually change or reset a user's password via the user's profile. Users can instead click the "Forgot Password?" link on the Sugar login screen to reset their passwords.

Last Modified: 2021-07-06 23:14:11

User Management

Overview

The User Management module provides administrators access to create, edit, activate, and deactivate the profiles of all the users in their Sugar instance. This module and underlying settings control each individual's login credentials as well as some personalized settings. During the installation process, Sugar creates one system administrator by default. The system administrator can log in and create additional users, in a variety of capacities, to be able to access Sugar and utilize all of the other CRM functionality. In combination with the role and team security, administrators can fully establish a profile for each user in Sugar.

Note: For instances that use SugarIdentity, the administrator will need to access [SugarIdentity](#) via the SugarCloud Settings console to create and manage user records.

Licensed User Limits

If an instance has more active users of a particular license type than is allowed by its Sugar license, regular users will not be able to log in. Admin users will be able to log in but will be redirected to the Users module. Once they have [deactivated](#) enough users, reduced the users assigned to over-limit license types, or purchased additional seats, regular users will be able to log in again. Users with an inactive status and Group users do not count toward these limits. [User types](#) and [license types](#) are described in more detail below. For more information on how Sugar's licensed user limits work, refer to the [Understanding User Types, License Types, and Sugar Licenses](#) article. SugarCloud customers can monitor the number of active users counting against their license via the [SugarCloud Insights](#) page.

User Types

There are three types of users in Sugar: Regular User, System Administrator, and Group User. Each user type has different functions in Sugar which will vary for each instance. Depending on an organization's use of Sugar, not all of these user types will be necessary. Only regular users and system administrators in an Active status count towards [licensed user limits](#). The purpose of each user type is explained in the following sections.

Regular User

A regular user is the most common of the user types. A majority of employees of an organization will be regular users. This user can access most Sugar modules and perform most standard functions by default. Regular users are subject to be

restricted in their abilities and what records they can access by an administrator using the [Teams](#) and [Roles](#) functionalities in Sugar.

Regular Users will appear in the [Employees](#) module. To create a Regular User, please review the [Regular and Admin Users](#) section of this page.

System Administrator

System Administrator users, or "admins," have all of the abilities and functionality of a regular user, but also have administrative privileges as well. Admins can perform functions such as creating and editing users, editing system-wide settings, and have access to diagnostic and troubleshooting tools. In addition, admins can access all modules and records and are not subject to team or role restrictions. All instances of Sugar require at least one administrator, but it is also recommended to have more than one in case the original admin is unavailable or is no longer with the company.

System Administrators will appear in the [Employees](#) module. To create a System Administrator, please review the [Regular and Admin Users](#) section of this page.

Note: All administrators where the user status is active count as a licensed user.

Group User

A Group User is a bucket that is used for assigning records to a non-specific user (e.g. Sales, Support) in the organization. Unlike a Regular or System Administrator user, a Group user does not have access to log in to Sugar. Due to this, they do not have the same profile settings available, including the option to set a password. Since Group users cannot log in to Sugar, they do not count against an organization's license count.

Examples of uses for a Group user would be to assign all new leads to a group user named "Sales" or assign all newly-created support cases to "Support" before they are delegated to specific users (e.g., John Smith) in the organization.

Please note that Group users will not appear in the [Employees](#) module. For more information on how to create a Group user, please review the [Group Users](#) section of this page.

License Types

For two of the user types, regular users and system administrators, an additional

field appears on user records called "License Type". This field determines what functionality the user may access. The options which appear in this field are determined by the product(s) which an organization has purchased from SugarCRM. When an organization has purchased more than one product, such as Sugar Sell and Sugar Serve, both will appear as options in the License Type field. Each user must have at least one license type selected, and selecting multiple products enables the user to access the combined functionality of all selected options. Select multiple options by clicking while holding the control or command key. Licensed user limits are calculated per each license type, and an active user assigned to multiple license types will be counted against each.

Note: If a user has license access to a module but not to a specific field on the module, the field value is replaced with a pill containing the text "License Required".

The following table describes what functionality is available for each license type in Sugar 10.3.x. In addition, some stock reports are only available to certain license types as described in the Stock Reports page. If your organization has purchased Hint, Hint will be included in the License Type field in Sugar versions 10.3.0 and higher. The Hint license cannot be selected alone and must be applied in conjunction with one of the CRM licenses (e.g. Sell or Serve) shown in the following table:

Functionality (Sugar 10.3.x)	Sell	Serve	Ultimate	Enterprise	Professional
Accounts[1] Activity Streams Calendar Calls[2] Contacts Data Privacy Documents Emails Employees Holidays Knowledge Base Meetings Notes Notifications Product Catalog[1] Reports	☐	☐	☐	☐	☐

[Tags](#) [Tasks](#)				
Advanced Reports Holidays Role-Based Dropdown Lists Role-Based Record Views Shift Exceptions Shifts Sugar Portal [2] SugarBPM Tile View Comment Log Dashlet Interactions Dashlet [2] Record View Dashlet	☐	☐	☐	☐
Business Centers Purchases Purchased Line Items Active Subscriptions Dashlet Purchase History Dashlet Knowledge Base Search Dashlet Focus	☐	☐		

Drawer				
[SugarPredict](#) Sales SugarBPM Templates Renewals Console	☐			
Change Timers Console List View Dashlet for SugarLive Customer Service SugarBPM Templates Messages Service Console SugarLive Sugar Portal Chat		☐		
[Bugs](#) [Cases](#)[2] [Releases](#) [Cases Summary Dashlet](#)		☐	☐	☐	☐

	□		□	□	□
Campaigns Contracts Forecasts Leads Opportunities[1] Quotes Quoted Line Items[1] Shipping Providers Target Lists Targets Tax Rates Web-to-Lead Forms Top 10 Sales Dashlet Forecast Bar Chart Dashlet Sales Pipeline Chart Dashlet In Forecast Dashlet Opportunity Metrics Dashlet Product Catalog Dashlet Product Catalog Quick Picks Dashlet					
Revenue Line Items [1]	□		□	□	

			☐	☐	☐
[Legacy Workflow Projects](#)					

[1] This module includes [enhanced functionality for Sugar Sell](#) license types.
[2] This module includes [enhanced functionality for Sugar Serve](#) license types.

Enhanced Module Functionality for Sugar Sell License Types

The following functionality is included on top of base module functionality for users with a Sugar Sell license type in Sugar 10.3.x.

- **Pipeline renewal automation**: When you close an opportunity containing a renewable service, Sugar Sell will automatically create a renewal opportunity with an expected close date that aligns with the end date of the renewable service. Modules that are enhanced by pipeline renewal automation are Accounts, Opportunities, Revenue Line Items, Quoted Line Items, and Product Catalog.
- **Automatic purchase creation**: Sugar Sell includes additional functionality within the Revenue Line Items module that allows for the automatic generation of purchase and purchased line item records.
- **Coterminous Add-ons**: Sugar Sell streamlines the process of adding additional services or products onto existing business by keeping dates consistent and automatically updating the related renewal opportunity and revenue line item(s).

Enhanced Module Functionality for Sugar Serve License Types

The following functionality is included on top of base module functionality for users with a Sugar Serve license type in Sugar 10.3.x.

- **Sugar Portal case deflection**: Knowledge base article search from Sugar Portal's Home page allows portal users better access to self-service issue resolution prior to creating cases.
- **Sugar Portal case and knowledge base dashlets**: The All Open Cases, Recently Resolved Cases, and Knowledge Base Categories & Published Articles dashlets allow portal users to view their company's current and

recent cases and search for knowledge base articles.

- **Sugar Portal request to close case**: The Request To Close button on cases in the portal allows customers to easily communicate that it is safe to close their case.
- **Case SLA and resolution trends**: Several fields are included on cases to track trends in first response SLAs and case resolution time, using both calendar hours and business hours.
- **Messages in the Interactions dashlet**: The Interactions dashlet includes records from the Messages module.
- **SugarLive call recordings**: If an admin has configured call recordings to be saved in Sugar using AWS Lambda, a link to the recording of calls completed in SugarLive is saved on the call record.
- **SugarLive call transcripts**: If an admin has configured call transcripts to be saved in Sugar using Contact Lens in Amazon Connect, the transcript of calls completed in SugarLive is saved on the call recording, including a sentiment value for each entry.

User Fields

The Users module contains a number of stock fields, which are included out-of-the-box with Sugar. The below definitions are suggested meanings for the fields, but many of the fields can be leveraged differently to best meet your organization's needs. System Administrators have the ability to alter, remove, or add fields in the User Profile tab via Admin > Studio, minus a few noted exceptions. For more information on adding or modifying fields, please refer to the [Studio](#) documentation.

For instances that use SugarIdentity, the following user fields are read-only and can only be edited in [SugarIdentity](#) via the SugarCloud Settings console:

- Username
- Status
- User Type
- First Name
- Last Name
- Title
- Department
- Work Phone
- Address Street
- Address City
- Address State
- Address Postal Code
- Address Country

- Primary Email Address

The User Profile tab contains the contact information for the user and other important user-specific settings. The User fields are as follows:

Field	Description
Address City	The city of the user's address
Address Country	The country of the user's address
Address Postal Code	The postal code of the user's address
Address State	The state of the user's address
Address Street	The street name and number of the user's address
Avatar	Upload an image to this field to represent the user that will be shown on the Activity Stream and next to the user's name on the navigation bar
Department	The department where this user works
Description	A description or other information about this user
Display Employee Record	Check this box if the user should have an employee record show in the Employees module
Email Address	The user's email addresses, where a primary address is selected to receive email notifications and if this should be a reply to address when using Sugar's outbound email (SMTP) functionality **Note**: This field is not editable in Studio
Email Client	When clicking on an email address in Sugar, this will determine if Sugar's email composer will open or if the user's primary email program on this computer (e.g. Microsoft Outlook, Apple Mail, etc.) will open **Note**: This field is not editable in Studio
Employee Status	The user's employment status in the organization (Active, Terminated, or Leave of Absence)

	Note: The Employee Status and Status fields are managed separately, so consider choosing a new employee status when the Status field changes.
Fax	The user's fax number
First Name	The user's first name
Home Phone	The user's home phone number
IM Name	The user's instant message screen name
IM Type	The user's instant message service type
Last Name	The user's last name
License Type	Determines what Sugar functionality the user may access **Note**: For more information, refer to the License Types section above.
Mobile	The user's mobile phone number
Other Phone	An additional phone number for the user
Reports to	The user's manager. The user that this user reports to will become an implicit member of this user's Teams. The "Reports To" field is also leveraged by several features in Sugar. For more information, refer to the Understanding the Reports To Field section of this page. **Note**: This field is not editable in Studio
SMTP Password	If an outgoing email server is defined in Admin > System Email Settings, the user's SMTP password can be input here to send mail through Sugar **Note**: This field is not editable in Studio
SMTP Username	If an outgoing email server is defined in Admin > System Email Settings, the user's SMTP user name can be input here to send mail through Sugar **Note**: This field is not editable in Studio
Status	Making a user inactive will make it so this user cannot log in to Sugar. This

	will also remove the user from taking a license seat, without having to [delete](#) the user. When making a user inactive, the admin is prompted to use the [Reassign Records](#) function. **Note**: The Employee Status and Status fields are managed separately, so consider choosing a new employee status when the Status field changes.
Title	The user's job title
User Name	The user name will be what the user logs in to Sugar with on the login page. It will also show for other users when they view fields such as "Assigned to" and "Created By". This is the name that will define the specific user in Sugar and should be unique for every user. **Note**: Spaces may not be included in user names.
User Type	Specifies what type of user this is which, a system administrator, regular user, etc as described in the [User Types](#) section above **Note**: This field is not editable in Studio
Work Phone	The user's work phone number

The Advanced tab in the user's profile includes settings to configure how Sugar will function for that specific user. The fields in the Advanced tab cannot be edited in Studio.

Field	Description
1000s Separator	Select a character to use as a 1000's separator, with an example showing in the "Example" box
Data Font Size	The default font size of the PDF body when generated by this user
Date Format	How date fields will appear for the user, with the ability to control month, day,

	and year formatting
Decimal Symbol	Select a character to use as a decimal symbol, with an example showing in the "Example" box
Default Teams	A default team defines the team set when this user creates a record. Whenever this user creates a record, the team is set as the user's default team, similar to how the "Assigned To" field is set to be the created user. **Note**: Users can be assigned any number of default teams
Export Delimiter	Character or characters used to delimit exported data by this user
Field Name Placement	Choose whether field names are displayed above or beside field values in record view; by default, field names are displayed beside the field value. This option does not apply to the Record View dashlet.
First Day of Week	Which day of the week will show as the first day when the user views the Sugar calendar
Font for Footer	Select a font for the footer in PDF documents when generated by this user
Font for Header and Body	Select a font for the header and body of PDF documents when generated by this user
iCal integration URL	URL in which someone can subscribe to the user's Sugar calendar within iCal or other programs that support iCal integrations
Import/Export Character Set	The default character set used for imports, exports, and vCard generation for this user
Main Font Size	The default font size in the PDF header when generated by this user
Name Display Format	How concatenated name fields will appear for the user, with the ability to control first name, last name, and salutation formatting

Notify on Assignment	When this box is checked, the user will receive an email notification when a record is assigned to them by another user **Note**: A system outbound mail account must be enabled in Admin > System Email Settings
Preferred Currency	Select the user's default currency to be used when creating new records. Additional currencies can be defined in Admin > Currencies.
Publish at my Location	Used to share free/busy information between Sugar and Microsoft Outlook calendars
Publish Key	Alphanumeric code entered by the user to uniquely identify his or her calendar and populate the iCal integration URL, Publish at my location site, and Search Location
Reminders	This field sets the default reminder settings for calls and meetings created by this user so that when the user creates a call or meeting, the reminder settings will be pre-populated to the configuration defined in this field. **Popup**: Users that are invited to a call or meeting created by this user to receive a browser popup notification for the call or meeting at a given time interval before the activity. **Email all invitees**: Invitees invited to a call or meeting created by this user to receive an email notification for the call or meeting at a given time interval before the activity.
Search Location	Used to share free/busy information between Sugar and Microsoft Outlook calendars
Select Modules for Navigation Bar	The order of the module navigation bar is defined by the order in the Display Modules column and modules listed in

	the Hide Modules column will not appear in the bar
Show Full Names	When this box is checked, the user will see users' full names ("John Smith") instead of user names ("jsmith") when using Sugar
Show Preferred Currency	Mark the checkbox to convert the base currency to user-preferred currency in list views and record views **Note**: User-preferred currency is not used in the Quotes record view or for quoted line items. For more information, refer to the Quotes and Quoted Line Items documentation in the Application Guide.
System Significant Digits	Define how many digits will appear after the decimal point when the user views a currency field, with an example showing in the "Example" box
Time Format	How time fields will appear for the user, with the ability to control hour, minute, and 12 versus 24-hour clock formatting
Time Zone	Select the local time zone for this user based on geographical location **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.
User Wizard Prompt	Mark the checkbox to have users go through the New User Wizard upon their first login

Understanding the Reports To Field

The Reports To field on the User record is used by various parts of Sugar to determine who a user's manager (i.e. supervisor) is. Some examples of how Sugar uses this relationship are described below:

- **Workflow Management**: Alerts and actions in Sugar's Workflows module allow you to send an alert to or assign a record to a user's manager. For example, you may wish to notify a user's manager when that user creates a new high-priority case. Refer to the [Workflow Management](#) documentation for more information.
- **Forecasts**: Managers aggregate the forecast amounts of their reportees with their own forecast amounts to predict their total team's sales and work towards the team's quota. Refer to the [Forecasts](#) documentation for more details on how sales managers use forecasts.
- **Teams**: Managers are an implicit member of all of their reportees' teams, which gives them access to all of their reportees' records. Refer to the [Team Management](#) documentation for more details on implicit and explicit team membership.
- **Organization Chart Dashlet**: This dashlet visually outlines the hierarchy of Sugar users under the current user according to the Reports To field. The dashlet includes reportees that are two or more levels below them.

Note: Only administrators can edit the Reports To field.

Users Module Tab

Administrators can access the Users module tab via Admin > User Management. Click the triangle in the Users module tab to open the Actions menu and Recently Viewed menu. You can also click the Users tab to access the Users list view. The Actions menu allows you to perform important actions within the module. The Recently Viewed menu displays the list of users you last viewed in the module. For more information on records last viewed, please refer to the [Viewing Via Recently Viewed](#) section of this page.
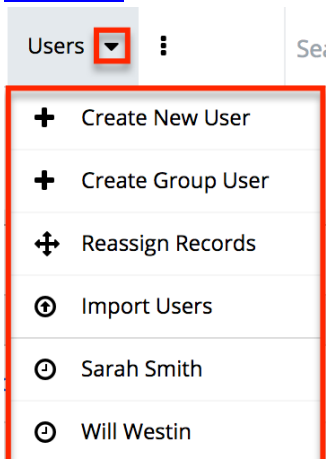
The options in the Actions menu allow you to perform the following types of action:

Option	Description
[Create New User](#)	Opens the edit view layout to create a new user **Note**: For instances that use SugarIdentity, the SugarCloud Settings Console opens in a new browser tab to [create](#) a new user.
[Create Group User](#)	Opens the edit view layout to create a new Group User
[Reassign Records](#)	Opens the Reassign Records tool
[Import Users](#)	Opens the import wizard to create or update users using external data **Note**: For instances that use SugarIdentity, the import option can only be used to [update](#) existing user records. Administrators can access SugarIdentity via the SugarCloud Settings console to [import](#) a list of new users using a CSV file.

Creating Users

There are various methods for creating new users in Sugar. These are via the Users module, duplication, or import. Creating users is an imperative function in Sugar as it allows for other members of your organization to log in and work in Sugar. Please note that you will not be able to add more users of a particular license type than is allowed by your Sugar license. For more information on how Sugar's licensed user limits work, refer to the [Understanding User Types, License Types, and Sugar Licenses](#) article.

Note: For instances that use SugarIdentity, an administrator will need to access SugarIdentity via the SugarCloud Settings console in order to [create](#) new users.

Creating via Module Tab

The most common method for creating users in Sugar is via the Users module. The edit view layout opens when creating the user directly from the Users menu and includes all of the relevant fields to create a new user. The fields and options on the Create page will vary depending on the [type of user](#) you are creating.

Regular and Admin Users

Regular and Admin users are the most common users that will be created in a Sugar instance and contain the most detail and fields compared to the other user types. For more information about the use of Regular and Admin users, please review the Regular User and System Administrator sections of this page.

Note: For instances that use SugarIdentity, administrators will need to create SugarIdentity user records via the SugarCloud Settings console. In addition, administrators will not be able to manually change or reset the user's password via the user's profile. Users can instead click the "Forgot Password?" link on the Sugar login screen to reset their passwords or change their password directly in Sugar via the Change Password option.

Use the following steps to create a new user:

1. Navigate to Admin > User Management.
2. Click the triangle in the Users module tab to open the Actions menu and select "Create New User".
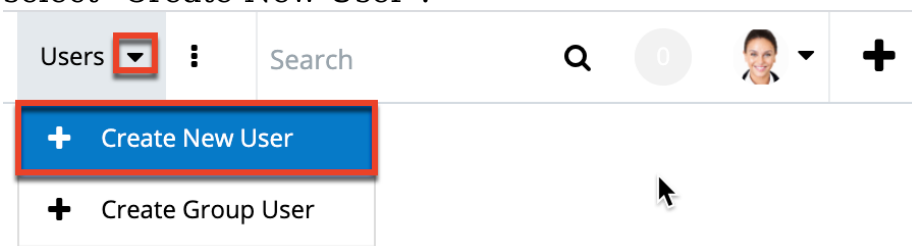
3. Enter appropriate values for the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
    - Enter the following information under the User Profile tab:
        - In "User Profile" enter a user name for this user which will define the specific user in Sugar and should be unique for every user. Sugar will default the user to being Active and a Regular User, which can be updated if the user is going to be an administrator.
        - In "Employee Information", contact information and other specific information about the user can be added. This will include phone numbers, contact address, the user's department and job title, and any description information.
        - In "Email Settings" the user's email address or addresses can be added. The email addresses can also be marked as "Primary", meaning that this will be the first email address that shows for the user, and "Reply-to", where automatic notifications from Sugar will be sent. In this section, the user's outbound email client will be selected to default to Sugar or an external program, such as Microsoft Outlook. If

a mail server is configured in Admin > System Email Settings, additional options will display here for SMTP Username and SMTP Password.

- ○ The Advanced tab includes preference-type settings (User Settings, Layout Options, Locale Settings, PDF Settings, Calendar Options) for the user. These are all specific to the user's account and will not affect system-wide settings or other users. Options such as assignment notifications, date and time formats, time zone, preferred currency, etc. are available to configure under this tab.
4. If the system-generated password feature is not enabled in Password Management, a Password tab will appear to the right of the User Profile tab. The administrator can manually enter a password for the user under this tab and provide it to the user. Please note that the password requirements listed on the right will be checked off as the new password meets the required conditions.
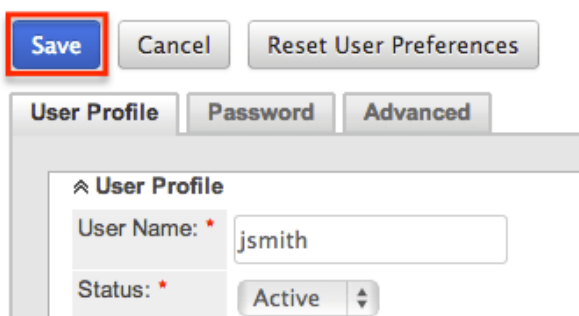
Note: If the system-generated password feature is enabled, this tab will not be available. Instead, a system-generated password will be sent to the user upon completion of the creation process.
5. After entering the necessary information click the Save button.

Upon saving, an email will be sent to the user with the user's system-generated password (if applicable) and a corresponding Employee record will be created for the user. Once the user is created, the administrator can assign Teams and Roles to the user via the Access tab.

Group Users

A Group user cannot log in to Sugar, but new and existing records can be assigned to the Group user. The Create page for the Group user consists of the User Name, Status, Name, User Type, and Email Address fields. For more information on how to use Group users in Sugar, please review the Group User section of this page.

Use the following steps to create a Group user:

1. Click the triangle in the Users module tab to open the Actions menu and select "Create Group User".
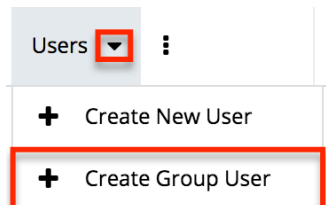
2. Enter a name and user name (e.g. Support) for this user.
3. In the Email Settings section, enter an email address or addresses for the Group user. The group user's primary email address will be marked as "Primary" and you can also mark "Reply-to" if any automatic notifications from Sugar will be sent to this address.
    ○ **Note**: If your organization has a group inbox or alias for a team represented by the group inbox, the email address can be added here for all notifications to be sent to the entire team.
4. Click "Save" to create the user.

Creating via Duplication

Often, administrators will find themselves in situations where multiple users must be created at once, whether it be when they are first setting up Sugar, a new group of employees is going to be using Sugar, etc. For situations such as these, one user can be configured and additional users can be quickly set up using the Copy option available on the record's detail view. When duplicating a user, all fields are populated from the original record to the duplicated one, except for the User Name field and password fields.

Note: The Copy option is not available for instances that use SugarIdentity.

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

1. Navigate to the detail view of the user you would like to duplicate.
2. Click the Actions menu and select "Copy".
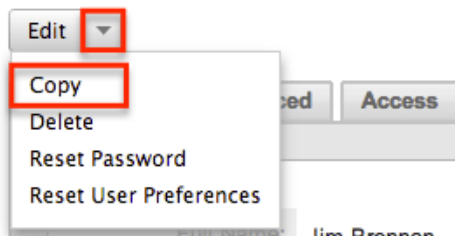
3. The displayed edit view is pre-populated with the original user's values, except for the user name and password.
4. Populate the "User Name" for the new user and edit any other fields or preferences to be specific to the new user. Fill in any information for the new user that did not exist on the original user.

5. If the system-generated password feature is not enabled in [Password Management](#), a Password tab will appear to the right of the User Profile tab where administrators can manually create a password for the user. Please note that the password requirements listed on the right will be checked off as the new password meets the required conditions.
Note: For instances that use [SugarIdentity](#), administrators will not be able to manually change or reset the user's password via the user's profile. Users can instead click the "Forgot Password?" link on the Sugar login screen to reset their passwords.

Note: If the system-generated password feature is enabled, this tab will not be available. Instead, a system-generated password will be sent to the user upon completion of the creation process.
6. Click "Save".

The new user is now created and available for use. This process is applicable to all [user types](#).

Creating via Import

The import function in Sugar allows you to push multiple user records into Sugar using a comma (or another character) delimited file instead of creating them one-by-one. Use the following steps to import users via the Import Users option. For more information on importing records to Sugar, please refer to the [Import](#) documentation.

Note: For instances that use SugarIdentity, the import option can only be used to update existing user records. Administrators can access the SugarCloud Settings console to [import](#) a list of new users using a CSV file.

The following steps cover importing new user records as an example:

1. Click the triangle in the Users module tab to access the Actions menu and select "Import Users".
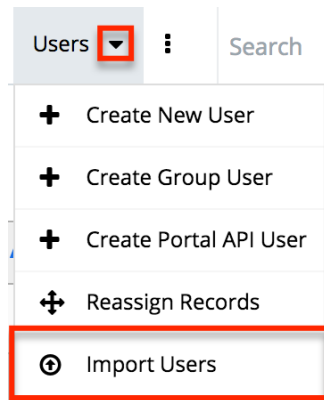
2. In Step 1, select the source of the data you are importing. Click "Next".
3. In Step 2, select the import file and choose "Create new records only". Click "Next".
4. In Step 3, confirm the import file properties. Click "Next".
5. In Step 4, confirm the field mappings for the import. Click "Next".
6. In Step 5, configure any fields you would like to use for duplicate checking.
7. In Step 6, view the import results.
   - The Created Records tab will show all of the new user records.
   - The Duplicates tab will show any records in the file that were detected as a duplicate and thus not imported from the duplicate check in Step 5 of the Import Wizard.
   - The Errors tab will show records that were not imported due to errors detected during import.

Viewing Users

There are various options available for viewing user records in Sugar including via Users recently viewed, Users list view, Users detail view, dashlets, and reports.

Note: If your instance uses SugarIdentity, then you can also view the user's basic and employment-related information in [SugarIdentity](#) via the SugarCloud Settings console.

Viewing via Recently Viewed

As you work, Sugar will keep track of which users you have recently viewed. Click the Actions menu in the Users module tab to see a list of your most recently viewed users, and click each name to open the user in detail view.
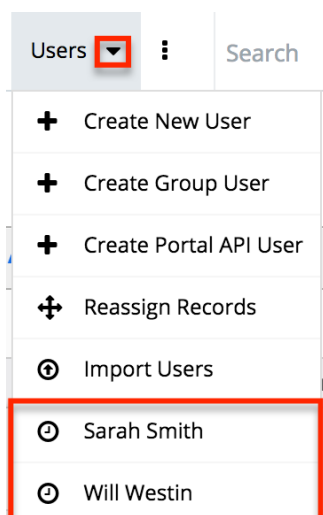
Viewing via List View

The Users list view displays all user records meeting the current search criteria. To access the list view, navigate to Admin > User Management. While the list view shows key user fields, you can click the user's name to open the record in detail view. For more information on viewing users via list view, please refer to the Users List View section of this page.

Viewing via Detail View

The Users detail view displays thorough user information including all user fields followed by subpanels of the user's related records belonging to various modules. The detail view also provides the Access tab, which allows Teams and Roles to be related to the user. Any admin user can click a user record's link from anywhere in the application, including from the Users list view to access the user's detail view. For more information on viewing the user's detail view, please refer to the Users Detail View section of this page.

Viewing via Dashlets

The Home page displays a collection of Sugar dashlets that allow users to get a quick view of various records, activities, reports, etc. Clicking a user's name from any dashlet will open the user in detail view and administrators can make changes to the user's profile as necessary. For more information on using dashlets, please refer to the Dashboards and Dashlets documentation.

Viewing via Reports

Administrators have the option to build, run, and manage reports to gather key data from records within Sugar. When building a report, you may either create a report based on the Users module or add links to the Users module in a report based on a module related to Users. Once the report is run, you can view the user record's detail view simply by clicking the user's name in the report results. Please note that you can only access user detail views via the Rows and Columns and Summation with Details-type reports as Summation and Matrix-type reports do not include hyperlinks in their display columns. For more information on using reports, please refer to the [Reports](#) documentation.

Searching Users

The Users module's list view includes Basic and Advanced Search functionality to help you locate users easily and effectively. Once the search is performed, the relevant search results will be displayed in the Users list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to pull up all records that include 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. %manager). This will pull up any record that has the word "manager" in the name, regardless of how it starts or ends (e.g. "Department Manager", "Product Manager" or "Project Manager").

For more information on using the various search methods as well as how wildcards are used, please refer to the [Search](#) documentation.

Basic Search

Basic search offers only Full Name as a searchable field. From the Basic search panel, you can click "Advanced Search" to access additional search functionality.

The buttons available in the Basic Search panel are also available in Advanced Search.

- **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.

When you run a search, Sugar will return records matching the criteria you typed in the Full Name search box. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all user records, simply click "Clear" and then "Search" to perform a blank search with no filters.

Administrators can also configure what fields appear on the Users Basic Search via Admin > Studio. For more information on editing the Basic Search layout, 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 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.
- **Layout Options**: Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the [Search](#) documentation.
- **Saved Searches**: Save, recall, update, and delete searches that you use often. For more information, please refer to the Saved Search section of the [Saved Search](#) documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given values. For example, if you select "Is Administrator" as "Yes" and enter in a "First Name" to search, Sugar will only return the user records that have a matching first name and are admins. Once the search completes, the relevant results will populate in the [list view](#) below the search panel. To see all user records, simply click "Clear" and then "Search" to perform a blank search with no filters.

Administrators can configure what fields appear on the Users Advanced Search via Admin > Studio. For more information on editing the Advanced Search layout, please refer to the [Studio](#) documentation.

Users List View

The Users list view displays all user records meeting the current search criteria. You can view the basic details of each user within the columns of fields.

You have the option to change what fields are displayed in list view by configuring your layout options available in Users Advanced Search. For more information on configuring your list view, please refer to the Layout Options section of the [Search](#) documentation. You can also change what fields are visible in the list view via Studio. For more information on editing list view layouts, please refer to the [Studio](#) documentation.

Checkbox Selection

You can perform actions on user records directly from the list view by first selecting the desired records. To select individual user records on the Users list view, mark the checkbox on the left of each row. To select or de-select multiple user 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 user results.

- **Select All**: Selects all records in the current search results including all pages of user results.
- **Deselect All**: De-selects 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
Mass Update	Mass update one or more users at a time **Note**: For instances that use SugarIdentity, the administrator will need to access SugarIdentity via the SugarCloud Settings console to mass update the Status and User Type fields.
Export	Export one or more users to a CSV file

Pagination

List view displays the current search results broken into pages that you can scroll through rather than potentially displaying 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 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.
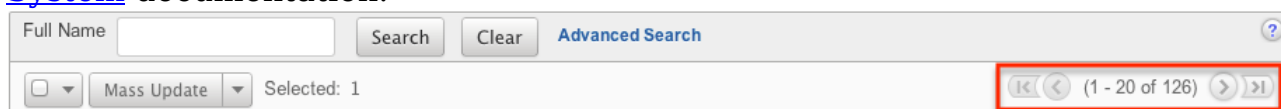
Column Sorting

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 in the column header. 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 to specify which field to automatically sort results by in the list view. For more information on setting a default column sort, please refer to the Layout Options section of the Search documentation.
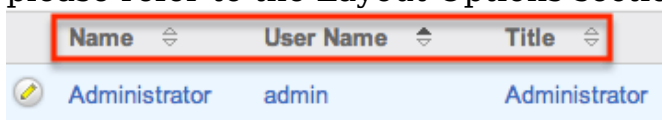
Users Detail View

The Users detail view displays thorough user information including all user fields which are grouped by default into the User Profile, Advanced, and Access panels. You can also view information from records related to the Users module as subpanels below the detail view. For more detailed information about adding relationships, please refer to the Studio documentation. The detail view can be reached by clicking a user record's link from anywhere in the application including from the Users list view.

Note: If your instance uses SugarIdentity, then you can also view the user's basic and employment-related information in SugarIdentity via the SugarCloud Settings console.

Administrators have the ability to change what fields are visible in the detail view by configuring the field groupings via Admin > Studio. For more information on editing detail view layouts, please refer to the Studio documentation.

Actions Menu

The Actions menu on the top left of each user's detail view allows you to perform various actions on the current record. Please note that administrators in Sugar can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on how to configure the actions menu, please refer to the System documentation.

Note: The Copy, Delete, and Reset Password options are not available for instances that use SugarIdentity.
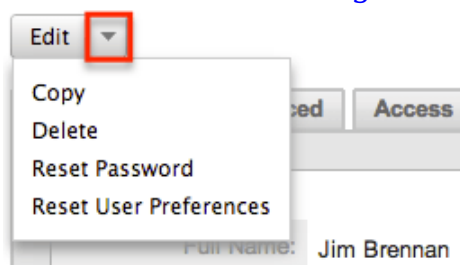
The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this user **Note**: For instances that use SugarIdentity, certain user fields (e.g. First Name, Last Name, Title, Work Phone) can only be edited in SugarIdentity via the SugarCloud Settings console.
Copy	Duplicate this user **Note**: The Copy option is not available for instances that are SugarIdentity-enabled.
Delete	Delete this user **Note**: The Delete option is not available for instances that are SugarIdentity-enabled. Administrators can access

	SugarIdentity via the SugarCloud Settings console to [delete](#) a user from Sugar.
[Reset Password](#)	Remove the user's current password and email a new one **Note**: The Reset Password option is not available for instances that are SugarIdentity-enabled. Users can instead click the "Forgot Password?" link on the Sugar login screen to reset their passwords.
[Reset User Preferences](#)	Revert all user preferences back to system-wide settings

Tabs

The detail view for a user is broken up into multiple tabs to better organize the different fields available in the Users module. Some of the available tabs in the user's profile are "User Profile", "Advanced", and "Access". A Downloads tab is also available when viewing your own profile. For more information on viewing your personal user profile, please review the [User Preferences](#) documentation.

User Profile

The User Profile tab displays information specific to the user such as the user's name, user type, employment status, contact information, etc. Administrators have the ability to configure the User Profile layout via Admin > [Studio](#). For more information on editing the user's profile in the Users module, please refer to the [Editing Via Detail View](#) section of this page.

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

Advanced

The Advanced tab shows information specific to the user's preferences in Sugar. Information such as the user settings, locale settings, PDF settings, etc. can be easily viewed under this tab. Please note that the layout of this tab cannot be edited in Studio. However, you can edit the information under the tab by clicking

the Edit button on the user's detail view. For more information on editing the user's profile, please refer to the [Editing Via Detail View](#) section of this page.

Access

The Access tab summarizes the user's Team and Role settings so that it can easily be viewed in one place. The Access table, Roles subpanel, and My Teams subpanel will appear under the tab.

- **Access Table**: The Access table summarizes the set of permissions assigned to the user and allows you to view the type of access they have along with the actions (e.g. View, Edit, Delete, etc.) they can perform in Sugar. This table is very similar to what appears in Admin > Role Management, but this table is not editable in the Users module.
  Note: Users with more than one role assigned will have the more restrictive role setting prevail on the access table. For example, if one role allows the user to delete records in the Contacts module, but the other role does not allow record deletion, the user will not be able to delete records in the Contacts module.
  The table will list the modules in rows on the far left with column headers representing the type of action (e.g. Delete, Edit, Export, etc.) users can perform in each module. For more information on role settings, please refer to the [Roles](#) documentation.

	Access	Access Type	Delete	Edit	Export	Import	List	Mass Update	View
Accounts	Enabled	Normal	None	Owner	None	None	All	None	All

- **Roles Subpanel**: The Roles subpanel will list all of the roles assigned to the user along with the description of each role. 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. System administrators can easily assign roles to the user as well as remove roles via the Roles subpanel.
- **Teams Subpanel**: The Teams subpanel will list all of the teams assigned to the user along with the description of each team. 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. System administrators can easily assign teams to the user as well as remove teams via the My Teams subpanel. For more information on team settings, please refer to the [Teams](#) documentation.

Subpanels

Subpanels can be added to the Users module by creating relationships via Admin >

Studio. All available subpanels will appear at the bottom of the user's detail view. For more information on adding relationships, please refer to the [Relationships](#) section of the Studio documentation.

The User Holidays subpanel is the only subpanel available for the Users module out of the box. This subpanel allows administrators to select specific days that the user will not be working. This is used when calculating project timelines in the Projects module. Holidays can be added using the Create button and inputting a date and description of the holiday.

Editing Users

The user's profile can be easily edited by the user or the administrator by clicking the Edit button on the user's detail view. In addition, changes to the user's profile can be made via the Users list view as well by clicking the Pencil icon to the left of the user's name. Editing the user's profile from the detail view and list view opens the full edit view layout which includes all of the relevant fields that can be updated as necessary.

Note: If your instance uses SugarIdentity, then you will need to access SugarIdentity via the SugarCloud Settings console to [update](#) certain [user fields](#).

Editing via Detail View

You can edit users by clicking the Edit button on the upper left of the user's detail view. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve the changes made. For more information on the detail view, please refer to the Users Detail View section of this page.

External Accounts

When viewing the edit view of a user, the External Accounts tab appears to the right of the Advanced tab. The External Accounts functionality allows you to connect external applications to Sugar, such as GoToMeeting, Google Drive (Google Docs), and WebEx. To create an external account record, follow the following steps:

1. Navigate to the [detail view](#) of the user to whom you would like to add the account.
2. Click on the External Accounts tab then click "Create".

3. Select the application you will be connecting to from the Application dropdown field. The fields available to complete will vary depending on the application (GoToMeeting, Google, WebEx) selected. Please note that additional external applications will appear on the list if they are enabled via Admin > Connectors.
4. Enter the necessary information for the external application and click "Connect".

Should you wish to prevent users from creating external accounts, you can remove the Create button for users in the External Accounts tab of their profiles by disabling the External Accounts module via a [role](#) assigned to those users. Please note the "Access Type" setting will not affect this module. Furthermore, editing or deleting the external account can be done by clicking the account's name on the External Account list view. This brings you back to the edit view with the necessary options and available fields.

The out of the box connectors perform the following functions:
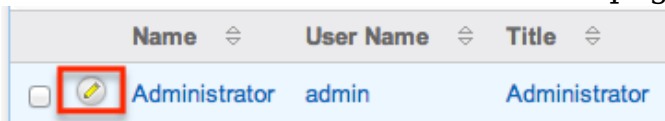
- **GoToMeeting**: The GoToMeeting connector allows you to create meetings in Sugar that are tied to your GoToMeeting account and will show as such on your GoToMeeting account. This allows the user to, after creating the Sugar meeting record, start the GoToMeeting directly from within Sugar's [Meetings](#) module.
- **Google**: The Google connector allows you to create [documents](#) within Sugar that, instead of uploading a file to the server hosting Sugar, allows the user to link to an existing Google document from Google Drive or to upload a file to that account. When clicking on a document name in the Documents module or any Documents subpanels, the user will be brought

to Google Drive instead of the download being initiated.

- **WebEx**: The WebEx connector allows you to create meetings in Sugar that are tied to your WebEx account and will show as such on your WebEx account. This allows the user to, after creating the Sugar meeting record, start the WebEx meeting directly from within Sugar's Meetings module.

Editing via List View

You can edit users via the list view by clicking the Pencil icon to the left of each user's name. The full edit view layout will open allowing you to make any changes to the user's profile as necessary. Once the user's profile has been updated, click "Save" to preserve the changes. For more information on the list view, please refer to the Users List View section of this page.

Editing via Import

You can also update existing user records via import using a CSV file. To update existing records, simply select the "Import Users" option under the Users module tab. Please note that the import process will vary between instances that use SugarIdentity and instances that do not use SugarIdentity. For instances that do not use SugarIdentity, refer to the Import documentation for more information on updating existing records via import. For instances that use SugarIdentity, refer to the Importing Updates to Existing User Records section of this page for more information.

Deactivating Users

When a user is no longer a member of your organization, it is best practice to deactivate them instead of deleting them. This ensures that the user will no longer be able to log in to Sugar, but any historical information tied to the user will still be available. While deactivating user records will not update any related records, the Reassign Records tool will be presented and can be used to reassign all of the user's records. If needed, you can filter list views to show records that are assigned to or created/modified by inactive users by filtering the user list on the Status field.

Note: Users that have been deactivated do not count towards your licensed user count.

Note: If your instance uses SugarIdentity, you will need to access <u>SugarIdentity</u> via the SugarCloud Settings console in order to <u>deactivate</u> a user from Sugar.

Use the following steps to deactivate a user and reassign their records:

1. Navigate to Admin > User Management and click the user you wish to deactivate.
2. Edit the user record and change the Status field to "Inactive". Click "Save".
3. A pop-up message will display asking if you would like to reassign all of the user's records. Click "Yes" if you wish to proceed.

4. You will then be presented with the Reassign Records tool. Follow the steps on this page to complete the deactivation. For more information, please review the <u>Reassigning Records</u> section.

5. Once the reassignment is complete, the user will be deactivated and no longer able to log in to Sugar.

Please note that you can also filter list views to show records that are assigned to inactive users by <u>filtering the user list on the Status field</u> and then mass updating the records to be assigned to an active user.

Deleting Users

If a user record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Users detail view. Please note that deleting user records will not delete any related records and will only prevent the user from being selected (e.g. Assigned to). When a user is no longer a member of your organization, it is best to <u>deactivate</u> them by changing the Status field to "Inactive" instead of deleting them. This way, any historical information tied to the user will still be available, but the user will no longer be able to log in to Sugar.

Note: If your instance uses SugarIdentity, you will need to access <u>SugarIdentity</u> via the SugarCloud Settings console in order to <u>delete</u> a user from Sugar.

Use the following steps to delete a user and reassign their records:

1. Navigate to Admin > User Management and click the user you wish to delete.
2. Select "Delete" from the <u>Actions Menu</u>.
3. A pop-up message will display asking for confirmation. Click "OK" to proceed.
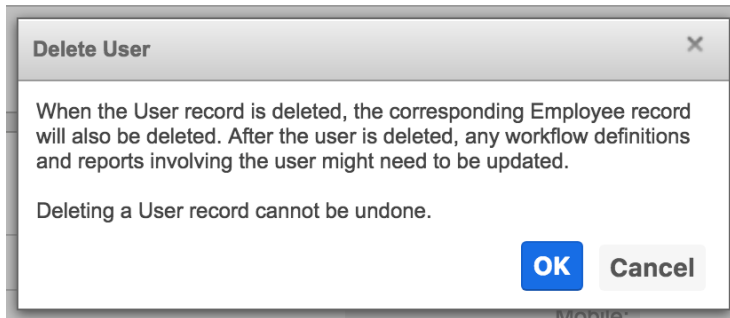
4. You will then be presented with the Reassign Records tool. Follow the steps on this page to complete the deletion. For more information, please review the Reassigning Records section.

5. Once your reassignment is complete, the user will be deleted, and you can freely navigate around Sugar.

Exporting Users

Sugar's Export option allows users to download all fields for the selected users to their computers as a .CSV (comma-separated values) file. This may be useful when needing to use User data with other software such as Microsoft Excel or to update existing records by exporting, making changes, and then importing the altered users back into Sugar. For more information on updating existing records via import, refer to the Import documentation.

Users may be exported from the Users list view by selecting "Export" from the Actions menu. User data can also be exported via the Reports module by creating or accessing reports containing specifically chosen fields for users and their related record(s). For more information on exporting records in Sugar, please refer to the Export documentation.
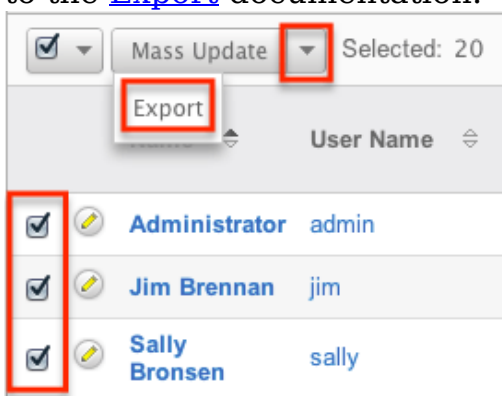
Due to PHP memory limitations on the server, there may be occasions when the application times out while exporting a large number of user records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Importing Updates to Existing User Records

In addition to importing new user records via Sugar's Import Wizard, you can also import updates to existing user records in Sugar using a CSV file. Please note that the import process will vary between instances that use SugarIdentity and instances that do not use SugarIdentity.

For instances that **do not use SugarIdentity**, refer to the Import documentation for more information on updating existing records via import.

For instances that **use SugarIdentity**, use the following steps to update existing user records via import:
Note: Fields that are only editable in SugarIdentity cannot be updated via import in Sugar.
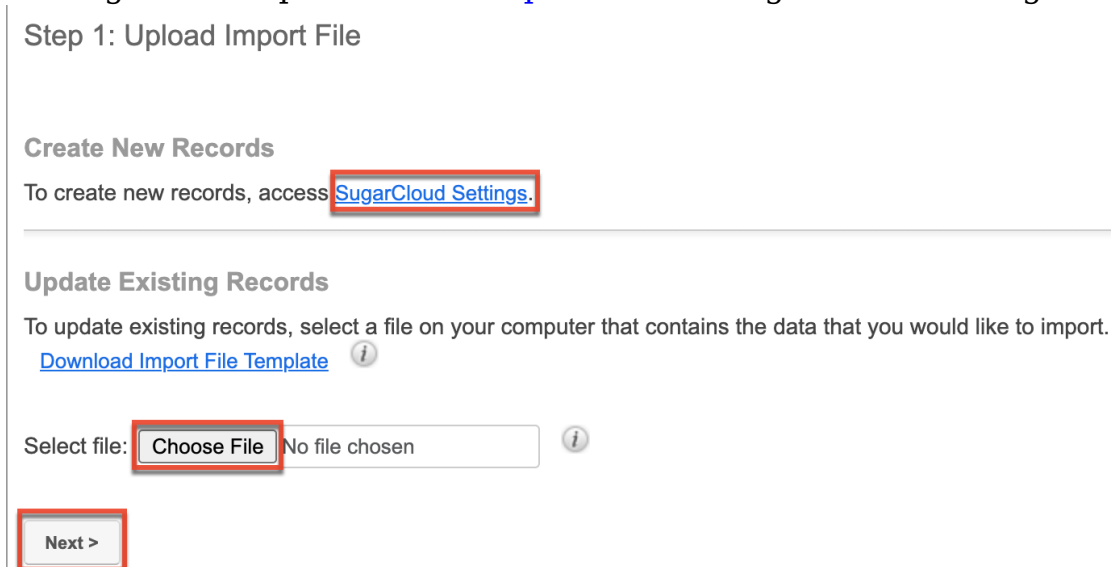
1. Click the triangle in the Users module tab to access the Actions menu and select "Import Users".
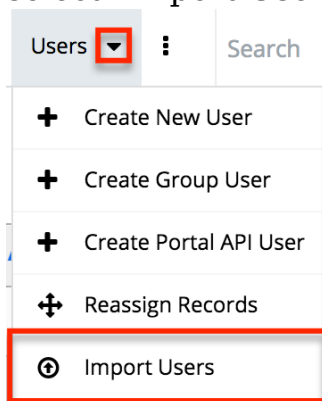
2. In Step 1, select the import file and click "Next".
   Note: To create new user records via import, click the "SugarCloud Settings" link to perform the import via the SugarCloud Settings console.

3. In Step 2, confirm the import file properties. Click "Next".
   Note: Configuring the import file properties (e.g. Name Display Format) for fields (e.g. First Name, Last Name) that are not editable in Sugar will not apply to the data in the import file.
4. In Step 3, confirm the field mappings for the import then click "Import Now".
   Note: [Fields](#) that are only editable in SugarIdentity via the SugarCloud Settings console will not be available to map.
5. In Step 4, view the import results. The Errors tab will show records that were not imported due to errors detected during import.
   Note: If the import file includes any changes to fields that are only editable in SugarIdentity via the SugarCloud Settings console, it will not get updated in the record.

Mass Updating Users

Mass Updating allows users to make the same change to multiple user records at once from the Users 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. Due to PHP memory limitations on the server, there may be occasions when the application times out while updating a large number of user records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches. For more information on configuring mass update, please refer to the [Studio](#) documentation in the Administration Guide.

Note: For instances that use SugarIdentity, the administrator will need to access SugarIdentity via the SugarCloud Settings console to [mass update](#) the Status and User Type fields.

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

1. Navigate to the Users list view via Admin > User Management.
2. Use the list view's [Basic](#) or [Advanced Search](#) to identify users you wish to modify.
3. Select the desired users individually or using the [checkbox dropdown's](#) options.
4. Choose "Mass Update" from the Actions menu.
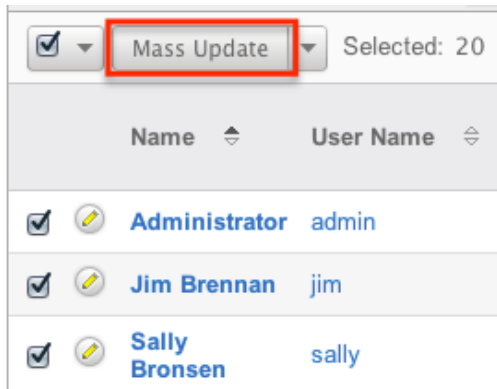
5. Scroll to the Mass Update panel and set values for the fields you wish to alter.
6. Click "Update" to save the changes to all of the currently selected user records.

Resetting User Preferences

As users make changes while navigating around Sugar, their preferences are stored in the Sugar database. This includes preferences such as sort orders on list view, previous searches on both basic and advanced searches, and settings in the Advanced tab of the user profile. Users can reset their preferences back to the default out-of-the-box settings, which will revert the user's changes made in Sugar. Please note that this action cannot be undone. If the user is currently logged in, the changes will not take effect until the user is logged out and then back in.

Note: Resetting a user's preferences is the only way to allow a user access to Sugar if they have been locked out using the Login Lockout feature in Password Management.

Use the following steps to reset a user's preferences:

1. Navigate to the user's detail view via Admin > User Management and select the user (e.g. Jim Brennan) from the list view.

2. Select "Reset User Preferences" from the Actions menu.
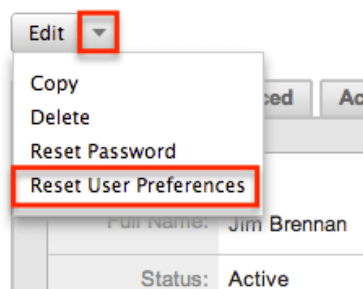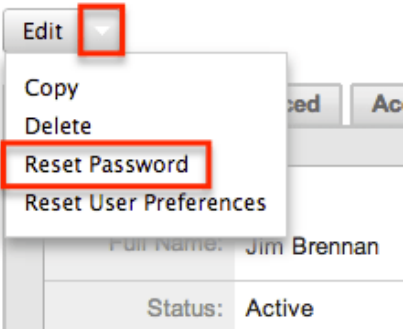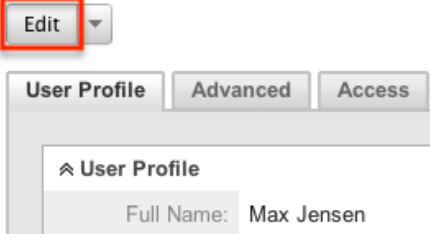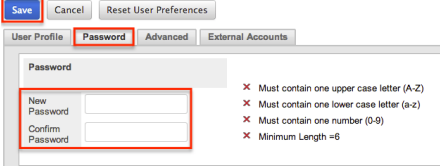
3. A pop-up box will appear confirming the reset. Click "OK" to proceed.

Resetting User Passwords

Administrators have the option to manually set or reset users' passwords as necessary. First, determine the state of the system-generated password feature in Admin > Password Management, and then choose one of the following methods:

System-generated password feature enabled	System-generated password feature disabled	SugarIdentity enabled
1. Navigate to the user's detail view via Admin > User Management. 2. Select "Reset Password" from the Actions menu. 3. Click "OK" in the confirmation pop-up.	1. Navigate to the user's detail view via Admin > User Management. 2. Click the Edit button on the upper left of the detail view. 3. On the Password tab, enter the new password. 	Users click the "Forgot Password?" link on the Sugar login screen to reset their own passwords.

	4. Click "Save" to confirm your change.	

Note: The user needs to log out and then back in for the change to take effect.

Reassigning Records

Reassign Records is a tool available in the Users module for administrators to change the Assigned To and Team fields for a specific user's records. This is best used when a user is changing departments, teams, or roles within the organization, or if the user is no longer an employee or using Sugar. The Reassign Records tool is automatically presented when [deleting](#) or [deactivating](#) a user. Please note that reassigning records cannot be undone in Sugar.

Note: You can [locate records assigned to Inactive users](#) by filtering the module's list view.

Use the following steps to reassign records:

1. Navigate to the Users module via Admin > User Management.
2. Click the triangle in the Users module tab to open the Actions menu and select "Reassign Records".
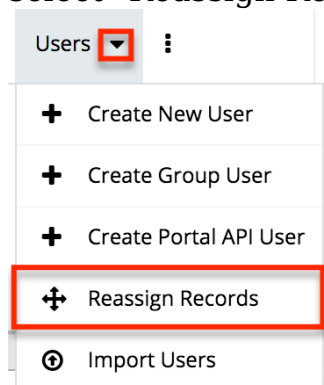
   The Reassigning Records tool can also be accessed during the process of [deleting](#) or [deactivating](#) a user, where it is used to reassign a user's records before deleting or deactivating them.

3. Select the user to whom the records are already assigned in the From User field.
4. Select the user to whom the records will be assigned to in the To User field.
   Note: You can select the same user in both fields if you are just changing the team for all of the user's records.
5. Select which team(s) the records will be assigned to in the Set Teams to field.

6. Select the module(s) you wish to include in the record reassignment. Multiple modules can be selected by holding down the Control key when using a PC or the Command key when using a Mac.

7. Selecting certain modules will display specific filters (e.g. Type) which can be applied to the module. Use these filters if you do not want to include all records assigned to the user. The list of modules and their filter fields are as follows:

Module	Filter Field
Accounts	Type
Bugs	Status
Calls	Status
Cases	Priority Status
Dashboards	Default Dashboard
Opportunities	Sales Stage Type
Tasks	Status

8. After selecting any filters, click "Next" to access the reassignment summary.
9. If you would like to see a detailed list of the changes that were made, click "Verbose Output". This list will include a link to the changed records and a summary of changes that were made.
10. If you would like the changes to show in the Change Log for the changed record, have any relevant workflows fire, or have assignment notifications sent out, please click the Include Workflow/Notifications/Audit checkbox. **Note**: This process performs a large set of actions at once and may take a long amount of time to complete.

Assessing Accounts

8 records from Accounts will be updated.
☑ Include Workflow/Notifications/Audit (significantly slower)

Assessing Calls

6 records from Calls will be updated.
☐ Include Workflow/Notifications/Audit (significantly slower)

Assessing Contacts

23 records from Contacts will be updated.
☐ Include Workflow/Notifications/Audit (significantly slower)

11. Click "Next" to complete the reassignment.
12. The final summary page will show how many records were affected and if any errors occurred during the reassignment. Click "Return" to return to the main screen of the Reassigning Records tool.

Processing Contacts

Update complete: 23 affected

Return

Due to PHP memory limitations on the server, there may be occasions when the application times out while reassigning a large number of user records. If you encounter an error when performing this action, we recommend reassigning records in smaller batches via each module's mass update option.

Last Modified: 2021-07-16 15:52:09

System

Overview

Sugar comes with the ability to configure many different system settings to personalize the way Sugar works. The System section is only available to administrative users and can be accessed via the Admin screen. The following sections are available options from the System section.

System contains the following menus:

System Settings	Configure system-wide settings
Locale	Set default localization settings for your system
Currencies	Set up currencies and conversion rates
Repair	Check and repair Sugar
Diagnostic Tool	Capture system configuration for diagnostics and analysis
Tracker	Enable/Disable tracking
PDF Manager	Manage templates for generated PDF files
Mobile	Select modules to appear in the Mobile applications
OAuth Keys	OAuth key management
Sugar Updates	Check for the latest available Sugar version
Import Wizard	Import records easily into the system
Upgrade Wizard	(On-site only) Upload and install Sugar upgrades
Languages	Manage which languages are available for users
Search	Select modules for the Global Search and configure full-text searching
Connectors	Manage connector settings
Scheduler	Set up scheduled events
Archive Records	Archive data from active tables in the system using the Data Archiver module
Web Logic Hooks	Configure actions to call out to code hosted outside of your Sugar instance to process specified actions.
License Management	Manage license properties

System Settings

System Settings allows administrators to configure system-wide settings to your organization's specifications. The system settings are split across a few different panes of related information. Change the values in any of the panels and click "Save" to preserve your changes.
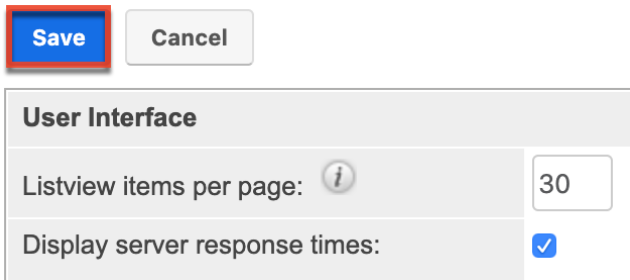
User Interface

The User Interface pane consists of a group of settings that affect the interface of Sugar. Use the following settings to configure the different aspects of the interface:

- **Listview items per page**: The maximum number of records to display per list view results set, as well as the search results set on the View All Results page for Global Search. By default, this is set to 20 records per results set. If additional related records exist, click "More <Module Name>..." (e.g. "More Accounts...") at the bottom of the list view.
    - **Note**: The recommended setting is below 50 for acceptable performance levels. As additional fields are added to the list view, this number should be at the lower end of the recommended setting.
- **Subpanel items per page**: The maximum number of records to display on a page in subpanels. By default, this is set to 5. If additional related records exist, click "More <Module Name>..." (e.g. "More Accounts...") at the bottom of the subpanel to load the next set.
    - **Note**: The recommended setting is no more than 25 with lower values recommended when subpanels include many fields.
- **System Name**: The name of this instance of Sugar (e.g. "My Company CRM") that displays in the browser's title bar after the current page's title.
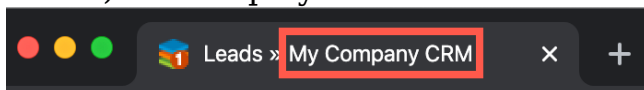
- **Show Full Names**: Select this option to set the default value for new users

to display the full name of users instead of login names throughout Sugar. **Note**: For instances that use SugarIdentity, when the [OpenID Connect authentication](#) is configured, the User Name field will be populated with a unique alphanumeric ID (e.g. User ID). So, it is recommended that the Show Full Names option be enabled to avoid having the alphanumeric IDs display in Sugar.

- **Current Logo**: The current logo being used in the bottom left-hand corner of the footer bar.
- **Select Logo**: Click "Choose File" to navigate to and select a new logo for your system. Logo dimensions should be 212x40 pixels, with the standard transparent background color, in PNG or JPG format.
- **Display Downloads Tab**: Select this option to display the Download tab in the User settings and provide users with access to Sugar plug-ins and other available files.
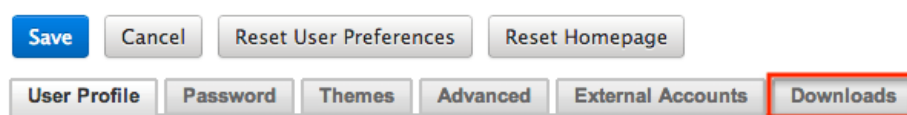
- **Lead Conversion Options**: Select an option from the dropdown menu to determine the handling of related activity records (e.g. calls, tasks, etc.) during lead conversion. For more information, please refer to the [Leads](#) documentation in the Application Guide.
  - **Move**: This option moves all of the lead's activities to the contact record created during conversion.
  - **Do Nothing**: This option does not alter the lead's activities during conversion. The activities remain related only to the lead. This is the default setting.
- **Display actions within menus**: Select to display detail view and subpanel actions within a dropdown menu. If disabled, the actions will display as separate buttons.
  - **Note**: Only applies to legacy modules.
- **Collapse all subpanels and disable sticky feature** : Select this option to collapse all subpanels in the record view by default and disable automatically expanding previously-expanded subpanels in order to improve performance. Once enabled, users wishing to view subpanel data will need to expand the subpanel each time they return to a module.
  - **Note**: Only applies to Sidecar modules.
- **Prevent user customizable subpanel layout**: Select this option to prevent users from dragging and dropping subpanels to a different location in the detail view layout.
  - **Note**: Only applies to [legacy modules](#).

Proxy Settings
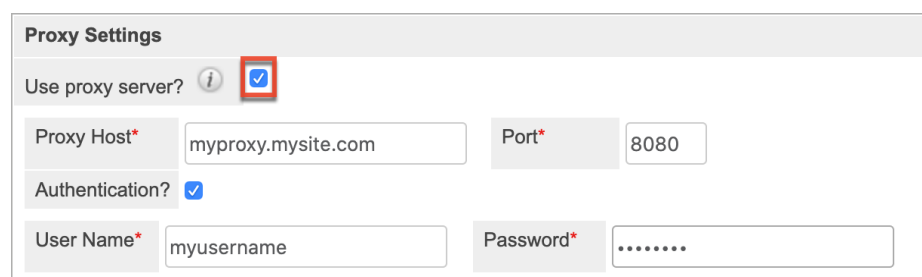
Proxy servers redirect Internet traffic coming from and to the server running

Sugar. If you are using a proxy server, you will need to enter proxy information into the system settings to allow the Sugar instance to communicate with the internet. This is necessary to allow the system licensing to validate and update. For more information on system licenses, please refer to the [License Management](#) section.

Note: Proxy settings should not be used for instances hosted on Sugar's cloud service.

Use the following settings to configure proxy settings:
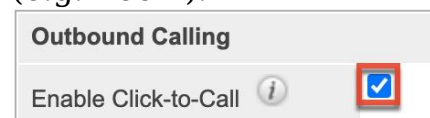
- **Use Proxy Server?**: Select this option to use a proxy server and to reveal the following fields.
- **Proxy Host**: The host name or IP address of the proxy server to use.
- **Port**: The communication port of the proxy server.
- **Authentication?**: Select this option if the proxy server requires authentication and to reveal the following fields.
- **User Name**: The user name to authenticate to the proxy server.
- **Password**: The password to authenticate to the proxy server.

Outbound Calling

If the Enable Click-to-Call setting is enabled, Sugar displays all stock and custom fields that have a type of "Phone" as a link in Sidecar modules. Click the link to dial the phone number using your default computer telephony integration software (e.g. Zoom).

Tweet to case

Tweet to case allows a user to convert a customer tweet shown in the Twitter [Dashlet](#) into a case record. Select "Enable Tweet to case integration" to enable this feature.

Preview Pane Settings

The preview edit feature allows users to edit records directly from the intelligence pane on list views. Please note that the "Enable edit in Preview pane" setting is enabled by default, but administrators can disable the preview edit feature based on their organization's needs by removing the checkmark from the box. For more information on using this feature, please refer to the User Interface page in the Application Guide.

Activity Streams

Sugar's activity streams are disabled by default, but administrators can globally enable the functionality based on their organization's needs. To enable the activity stream in Sugar, simply place a check in the Enable Activity Streams box. When the feature is enabled, record posts will be generated in the system when performing actions such as creating records, updating records, linking records, unlinking records, etc. In addition, users will be able to access activity streams from anywhere within Sugar including via the home page, My Activity Stream dashlet, module's list view, etc. Please note that when the activity stream is disabled, Sugar will display a message in each of these locations indicating that the activity stream is not enabled. For the intelligence pane, the record's related activity stream posts will not appear.

Comment Log Settings

The Comment Log Settings panel contains a field that allows admins to configure the maximum number of characters shown per comment log entry. If an entry is longer than this value, it is truncated with a "Show more..." link to display the full text. Once the entry is expanded, a "Show less..." link is displayed to collapse the

text so that only the configured number of characters is shown again. The default value is 500 characters.

Comment Log Settings	
Maximum characters to show per comment entry	500

Advanced

The Advanced panel consists of the following group of settings for advanced configuration of Sugar:

- **Validate user IP address**: Select this option to validate the user's IP address while accessing Sugar. If the IP address of a user changes in mid-session, Sugar will log them out and force them to log back in for security reasons. Please note that this setting is disabled by default out-of-the-box.

  - **Note**: Some high-availability systems, VPNs, and switching Wi-Fi and wired connections may change IP addresses and thus cause your users to be logged out when they have not changed their configuration.
- **Log slow queries**: Select this option to log queries that take longer than the slow query time threshold. This is useful for performance debugging.

  - **Note**: There is an inherent overhead to logging slow queries. If the threshold is set too low, it may cause performance issues.
- **Maximum upload size**: Specifies the maximum file size in bytes that is allowed to be uploaded to Sugar. This setting affects images, import files, and module uploads.
  - **Note**: The file upload size is also dependent on the php.ini upload_max_filesize and post_max_size directives. This admin setting will not affect the maximum cumulative file size for email attachments, which is set to 10MB per message via the max_aggregate_email_attachments_bytes configuration attribute.
- **vCal Updates Time Period**: Determines the number of months the Free/Busy data is published to vCal. Specify the number of months in advance of the current date that Free/Busy information for calls and meetings to be published. To turn Free/Busy publishing off, enter "0". The maximum is 12 months.
- **Log memory usage**: Select this option to log memory usage per action performed in Sugar. The data will be stored in the ./memory_usage.log file.
- **Slow query time threshold (msec)**: Specify a threshold in milliseconds to begin logging slow queries at. If "Log slow queries" is selected, queries that take longer than the threshold to process will be logged. If you have enabled the Tracker Queries option on the [Tracker](#) page, you can run the

pre-defined Slow Queries report to view slow queries.
- **Display stack trace of errors**: Select this option to display where errors occur in the application's stack trace. This option is for debugging purposes and should not be left on in a production instance.
- **Developer Mode**: Select this option to disable caching to immediately view changes made to language, vardefs, and template files. This option is for debugging purposes and should not be left on in a production instance.
- **Import - Maximum Number of Rows**: Specify how many rows are allowed within import files. If the number of rows in an import file exceeds this number, the user will be alerted. If no number or zero is entered, an unlimited number of rows are allowed.
  - **Note**: Header rows count towards the total number of rows in the import file.
- **Prevent private team names from inheriting the user's name fields** : Select this option if private team names may be different from the user's first and last name. By default, Sugar will update a private team name to [Firstname Lastname] any time the corresponding user's profile is edited and re-saved, even if the change was not made to the user's first or last name. Enable this option to ensure that edited private team names do not revert to the system default.

Logger Settings

Sugar comes with a built-in logging system to log information or errors that occur in the application. By default, the logs are written to sugarcrm.log in the Sugar root directory. If a problem arises, you can refer to the log file for information that may help in troubleshooting the issue. The Logger Settings panel consists of a group of settings that affect the Sugar logs. Please note that SugarCloud customers can generate PHP error logs and access logs via the [SugarCloud Insights](#) page.

Note: The Logger Settings panel is hidden for instances on Sugar's cloud service. Should you require a log level to be temporarily changed on a SugarCloud production environment, you must open a [support case](#). For more information about default configuration settings for Sugar's cloud environments, please refer to the [SugarCloud Policy Guide](#).

Use the following settings to configure the different aspects of Sugar logging:

- **Log File Name**: Specify a name for the log file. Defaults to sugarcrm.
- **Maximum log size**: Specify the maximum size of the log file in megabytes (MB). The default is 10MB. Once a log file reaches the specified size it is renamed to have an incrementing number and a new file will be created to contain new logs.

- **Log Level**: Select the event level that you want to capture in the log file. The levels are listed below in order of the most log records to the least. The default level is fatal. When specifying a logging level, the system will create log files for the specified level as well as higher levels. For example, if you select "error", the system creates log files for "error", "fatal", and "security". Please note that there is an inherent overhead to logging. If the log level is set too high, it may cause performance issues. The "info" and "debug" settings are not recommended for continuous use in a production environment.
    - **debug**: Logs events that help debug the application
    - **info**: Logs informational messages
    - **warn**: Logs potentially harmful events
    - **deprecated**: Logs a function in the application that will be removed in an upcoming release
    - **error**: Logs error events in the application
    - **fatal**: Logs severe error events that cause the application to abort
    - **security**: Logs events that may compromise the security of the application
    - **off**: The logger will not log any events
- **Append after filename**: Select a time period from the dropdown list to append to the file name (None, Month_Year, Day_Month, Month_Day_Year). This makes it easier to identify the log that you want to view.
- **Default date format**: The date format for the log file. This format must be supported by strftime. Defaults to %c.
- **Maximum number of logs (before rolling)**: The maximum number of log files to save. When the number of log files exceeds this limit, Sugar deletes the log file that was created first. Defaults to 10.

View Log

The Sugar log is stored in the root directory of Sugar and is accessible from the operating system. Administrators who do not have access to the operating system running Sugar do have the ability to view the log through Sugar. Navigate to Admin > System Settings and find the "View Log" link at the bottom of the screen:

Logger Settings	
Log File Name *	./sugarcrm
Maximum log size *	10MB
Log Level	Warn

View Log

Save   Cancel

This opens the log viewer for the current log file. You have the following options for navigating the log file:

- **All**: Select this option to view the entire log.
- **Mark Point**: Select this option to mark a starting point in the current log file.
- **Refresh From Mark**: Select this option to view any entries made in the log after the most recent mark.
- **Next**: Select this option to view new entries in the current log file.
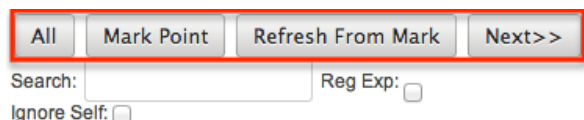
A common method for utilizing these options to debug a problem would be to click "Mark Point", perform the action causing problems, and then select "Refresh From Mark" to see any log entries caused by the action being debugged.

You also have the ability to search within the log file for keywords. To perform a search, simply enter a keyword into the search box and press Enter on your keyboard to execute the search.

Locale

Locale allows administrators to configure localization settings to your organization's specifications. Some of the settings specified here can be overridden by user-level personalizations such as date and time formats on the User Preferences page. The locale settings are split across a few different panels of related information. Change the values in any of the panels and click "Save" to preserve your changes.
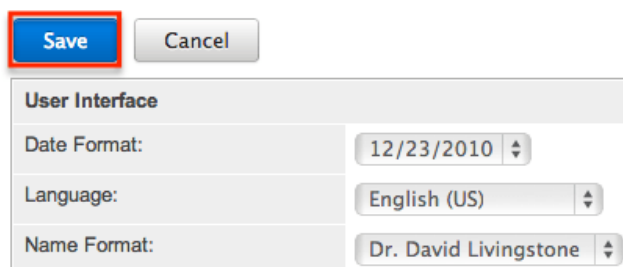
User Interface

The User Interface panel consists of a group of locale settings that affect the interface of Sugar. Use the following settings to configure the different aspects of the interface:

- **Date Format**: Select a format from the dropdown for displaying the date throughout the application.
- **Language**: Select a default language from the dropdown for use throughout the application. Users can select a different language from the login page. For more information regarding enabling or disabling languages, please refer to the [Languages](#) section.
- **Name Format**: Select a format from the dropdown for displaying people names throughout the application. You can specify any combination of salutation, first name, and last name.
- **Time Format**: Select a format from the dropdown for displaying the time throughout the application.

Users have the ability to override the default date, time, and name formats through their user profiles. For more information on how to set locale settings per user, please refer to the [Locale Settings](#) section of the Getting Started documentation in the Application Guide.

System Currency

The System Currency panel consists of a group of currency settings that affect the interface of Sugar. The system currency is displayed in addition to a record's original currency in most places across Sugar. The value is displayed in the system currency with a grey box containing the value in the record's currency next to it. However, the system currency can be overridden by the user's preferred currency if "Show Preferred Currency" is enabled in their [Locale Settings](#) and the user's preferred currency is different from the system currency. Use the following settings to configure the different currency options:

- **Currency**: The name of the default currency your organization uses to conduct business.
- **ISO 4217 Currency Code**: The ISO code for the currency.
  - **Note**: This setting must be populated in order for the currency (e.g. EUR) to display in the Quotes detail view.
- **Decimal Symbol**: The default decimal symbol.
- **Currency Symbol**: The default symbol for the currency.
- **1000s Separator**: The default delimiter to separate thousands.

Users have the ability to override the currency defaults through their user profiles. For more information on how to set currency settings per user, please refer to the [Locale Settings](#) section of the Getting Started documentation in the Application Guide.

Export Settings

The Export Settings panel consists of a group of export settings that affect different aspects of exporting in Sugar. Use the following settings to configure the different export options:

- **Export Delimiter**: The delimiter used to separate fields while exporting data. Defaults to a comma.
- **Disable export**: Select this option to disable the export option for all users, including administrators.
- **Default Character Set for Import and Export**: Select a default character set from the dropdown that handles the expected characters in an import and export. Defaults to ISO-8859-1.
- **Admin export only**: Select this option to disable the export option for standard users, administrators will be allowed to export.

Users have the ability to override the default export delimiter and character set through their user profiles. For more information on how to set export settings per user, please refer to the User Preferences section of the Getting Started documentation in the Application Guide.

Note: Locales that use character encoding other than ISO-8859-1 must specify the appropriate character set.

Database Collation

The Database Collation panel only shows if running on a MySQL database and contains an option to change the collation of the connection Sugar makes to the database. Select the desired collation from the dropdown. Defaults to utf8_general_ci.

Note: Changing this setting will not change existing tables, but only new tables going forward. If this setting does not match the collation of the current tables in the database then the database will return errors when accessing those tables.

Currencies

Currencies allow administrators to create and manage currencies and exchange rates in Sugar. The defined currencies in the system can be viewed in the Currencies list view which can be accessed by selecting "Currencies" under the System panel of the Admin page. Please note that the default system currency (e.g. USD) will always display first in the Currencies list view. The default system

currency cannot be edited via the Currencies module and will need to be edited via Admin > Locale. For more information on configuring the default currency, please refer to the System Currency section.

Note: For additional information regarding the basics of performing common tasks or operations (e.g. creating records, editing records, deleting records) in the application, please refer to the User Interface documentation in the Application Guide.
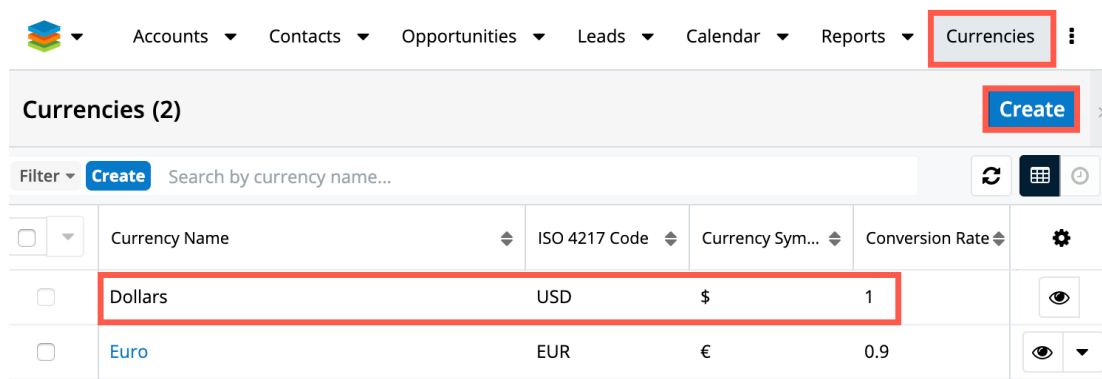
To create a new currency in the system, simply click the Create button on the upper right of the Currencies list view. Enter appropriate values for the fields in the record view layout then click "Save".
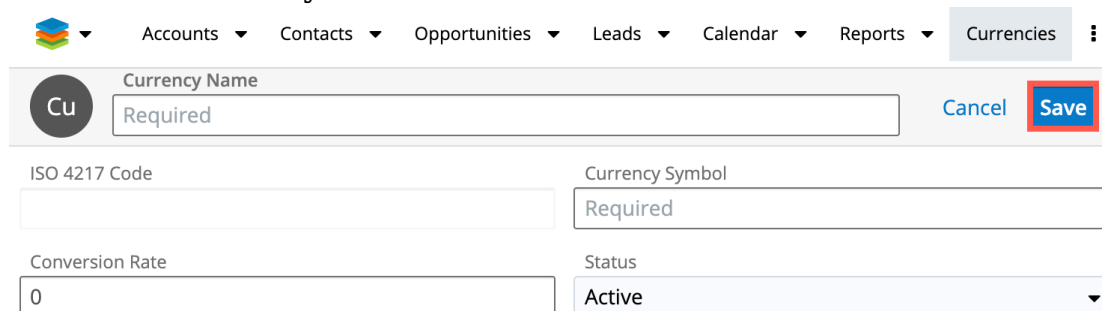
Field	Description
Currency Name	The name or designation of the currency **Note**: The currency name auto-populates based on the value entered in the ISO 4217 Code field.
ISO 4217 Code	The ISO code for the currency **Note**: This setting must be populated in order for the currency (e.g. EUR) to display in the Quotes module.
Currency Symbol	The default symbol for the currency **Note**: The currency symbol auto-

	populates based on the value entered in the ISO 4217 Code field.
Conversion Rate	The conversion rate to get to this currency from the system's default currency.
Status	The current status of the currency (e.g. Active, Inactive) **Note**: Selecting "Inactive" will remove this currency from currency fields throughout the application.

Updating Conversion Rates

Users may use the currencies defined in Admin > Currencies when populating any currency amount field in stock or custom modules. When doing so, the exchange rate for the selected currency is stored on the record itself. The conversion rate stored on each record will update to match the current rate specified in Admin > Currencies under the following scenarios:

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

To keep closed-business amounts historically accurate, opportunity and quote records will not update if they are in a closed status. For more information about updating opportunity currency rates, please refer to the Opportunities documentation in the Application Guide. For more information about updating quote currency rates, please refer to the Quotes documentation in the Application Guide.

Languages

The Languages section allows administrators to configure which languages are available for users to log in with. To disable a language, simply drag the language from the Enabled Languages panel to the Disabled Languages panel and click "Save".

Any languages in the Disabled Languages section will not be in the Languages dropdown while logging in.

Search

Global search allows users to search for information across their entire Sugar database as opposed to restricting search within a specific module. For more information on how to use global search, please refer to the Global Search section of the Search documentation in the Application Guide. The Search administration settings allow administrators to configure, enable, and index full-text search. Global searches in the desktop application and Sugar Mobile will be returned by full-text search.

Configuring Full-Text Search

Sugar's global search is enabled with full-text searching abilities that use the ElasticSearch engine. Full-text search allows users to search throughout various fields and modules for an enhanced search experience. In order for results to return for a particular module, the module must be enabled on the Full-Text Search Configuration page. To enable or disable a stock or custom module for global search, simply drag and drop the module between the Enabled Modules or Disabled Modules column and click "Save".
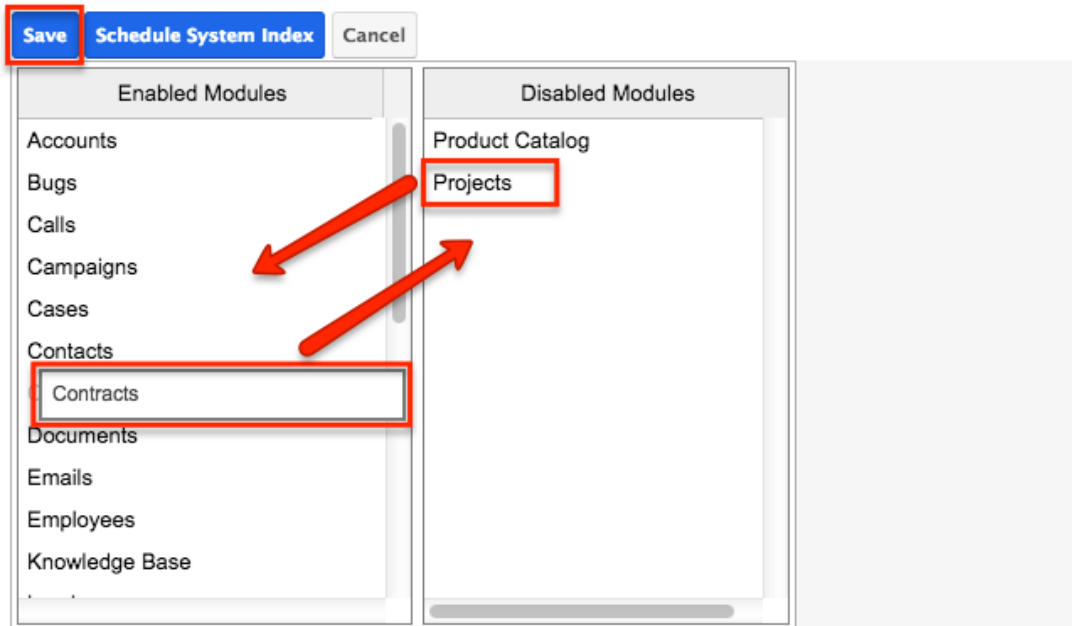
Disabled modules will not be included in the global search results nor available to select in the Modules list on the Global Search bar in the desktop application. For more information on filtering the global search by modules, please refer to the Filtering by Module section of the Search documentation in the Application Guide.

After enabling modules for Global Search, a full system index must be performed in order for the module to appear in the search results. For more information on performing a system index, please refer to the Indexing Full-Text Search section of this documentation.

Individual module fields must be enabled for full-text search in the field attributes via Studio > {Module Name} > Fields > {Field Name}. For more information, please refer to the Studio documentation.
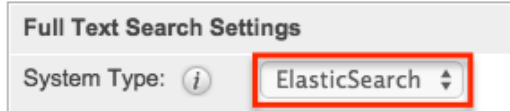
Note: Only modules enabled for Full-Text Search can be referenced in user posts on the activity stream. For more information on referencing record's in posts, please refer to the Activity Stream documentation in the Application Guide.

Activating Full-Text Search

Sugar's global search is enabled with full-text searching abilities using the ElasticSearch engine. Full-text search (FTS) allows users to search throughout various fields and modules for an enhanced search experience. Please note that ElasticSearch is required to be set up when installing Sugar for on-site instances and it is automatically enabled by default for instances on Sugar's cloud service.

Use the following steps to configure full-text search:
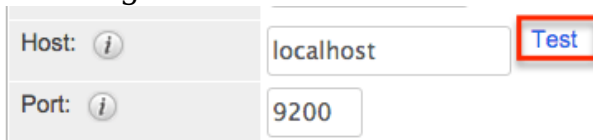
1. The ElasticSearch server is selected by default for the System Type field.
   - **Note**: For more information on ElasticSearch, please refer to www.elasticsearch.org.

2. Enter the host name or IP address of the full-text search engine.
   - **Note**: Defaults to "localhost" assuming you are running the search engine on the same server as Sugar.
3. Enter the port number for Sugar to connect to the search engine.
   - **Note**: Defaults to "9200", which is ElasticSearch's default port number.
4. Click "Test" to verify that the settings are entered correctly and confirm that Sugar connects to the search engine successfully.
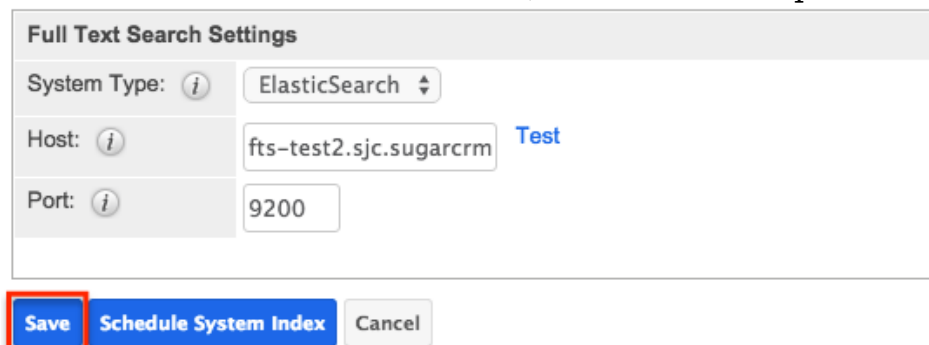
   A pop-up message will confirm if the connection was successful or not.
5. If the connection was successful, click "Save" to preserve your changes.

Each enabled module has a set of fields that are enabled for full-text searching by default. Administrators can enable or disable specific fields for full-text search via Admin > Studio. For more information on how to enable or disable fields for full-text search, please refer to the Studio documentation.

Note: Once a new module or field is added to full-text search, you must perform a system index in order for that field or module to be included in the full-text search results.

Indexing Full-Text Search
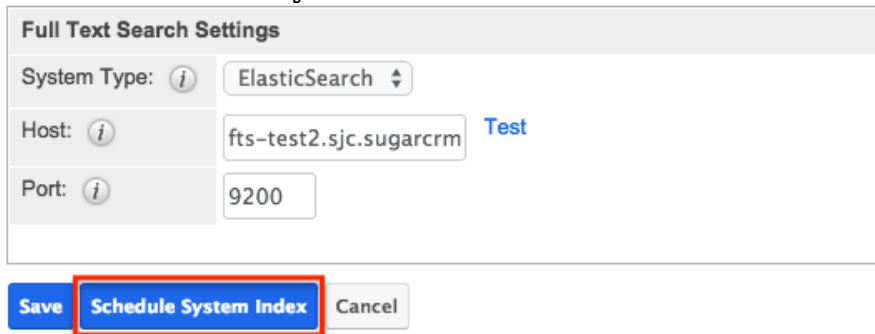
Full-text search relies on an index of the records and data to be able to quickly locate results. After enabling full-text search, or enabling a module or field, you

should perform a full index of your system.

Note: System performance can be affected while the index is being performed. It is recommended to run a system index during low usage or off-hours.

Use the following steps to perform a full system index:

1. Click "Schedule System Index".

2. A pop-up message will display warning of potential performance issues during the index. Click "OK" to proceed.
3. The list of available full-text search modules will display. Simply select one or more module(s) to perform the index. You may also select "All" to index all full-text search enabled modules.

4. Select the checkbox to delete the current index data before the index operation runs. If this is the first index being performed on the system, you do not need to select this option. If you have added fields to a module's index, then this checkbox should be selected or the new field may not show in the results.
5. Click the Index button to schedule the index.
6. The next time the scheduler runs, it will rebuild the index based on the selected options. For more information on schedulers, please refer to the

[Schedulers](#) documentation.

Note: The time and resources required to perform an index are directly proportional to the number of modules selected for the indexing. It is recommended that you choose only the modules that require indexing and perform the index during low usage or off-hours.

Configuring Legacy Global Search

Legacy global search has been deprecated and is no longer applicable to any parts of Sugar. To enable modules for global search in the desktop application or Sugar Mobile, use the [Full-Text Search Configuration](#) instead.

License Management

The License Management section allows administrators to edit and revalidate their Sugar license as well as view information such as the download key, expiration date, number of users, etc. Sugar is purchased with a set number of user seats for each Sugar product (e.g. Sugar Professional, Enterprise, Sell, and Serve). Sugar users, including administrators, are then assigned to one or more products via the [License Type field](#) on each's user record. If an instance has more active regular and administrator users than have been purchased for each license type, regular users will not be able to log in. Admin users will be able to log in but will be redirected to the Users module in order to correct the issue. Once enough users have been deactivated or additional seats have been purchased, regular users will be able to log in again. For more information, refer to the [Understanding User Types, License Types, and Sugar Licenses](#) article. SugarCloud customers can monitor the number of users counting against their license via the [SugarCloud Insights](#) page.

Download Key

The download key is a 32 digit alphanumeric key that is unique to your Sugar account. The number of user licenses your organization purchased, as well as the subscription expiration date is tied to your download key. Upon purchasing Sugar, you will receive a Welcome email containing your download key information which will need to be entered during installation of the Sugar application. Once the download key is entered in the system, the corresponding information such as the expiration date, number of users, number of offline client licenses, and number of concurrent self-service portal users will automatically populate and be displayed in Admin > License Management.

Editing the License Key

Although rare, there may be times when system administrators will need to edit their license key via Admin > License Management. For example, some product changes (e.g. Sugar Enterprise to Sugar Serve) may result in a new license key being provided by SugarCRM. You will need to update the License Management page with the new license key to associate your account with the new Sugar product.

The fields in the License Management panel are as follows:
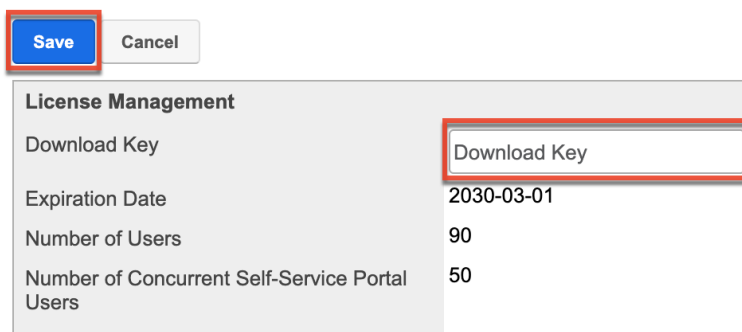
- **Download Key**: The download key associated with your Sugar subscription.
- **Expiration Date**: The date your Sugar license expires.
- **Number of Users**: The number of users allowed to access Sugar based on the number of purchased licenses.
- **Number of Offline Client Licenses**: The number of offline clients associated with your license key.
- **Number of Concurrent Self-Service Portal Users**: The number of self-service portal users associated with your license key.

The following steps cover editing the license key for your account when changing Sugar products as an example:

1. Navigate to Admin > License Management.
2. Click the Edit button and enter the download key associated with your new Sugar product.
3. Once the download key is entered, click "Save".
   Note: The expiration date, number of users, etc. will automatically be updated based on the new download key.

Please note that when you save the new license key information, the system automatically checks it against the information in the SugarCRM database to make sure it is valid.

License Validation

The License Validation panel of the License Management page allows administrators to re-validate their license as necessary. Sugar automatically re-validates your license once every 90 days as long as a system administrator logs into Sugar within the 90 day period. However, if your system fails to communicate with the License Validation server through the internet or you are behind a firewall, you will have to re-validate the license via Admin > License Management. If the re-validation is successful, the Status field in the License Validation panel will display the timestamp of the successful validation. The validation key expiration date will be 90 days from the date of the last successful validation date.

License Expiration

Typically, Sugar licenses are purchased for a one year period (e.g. 01/03/2020 to 01/03/2021). Please note that you will be notified of your upcoming subscription renewal via email or call and a notification will appear in the Sugar cube on the upper left of your Sugar account regarding your license expiration. If the subscription is renewed past the expiration date, then administrators must re-validate their license via Admin > License Management in order to update the account with the new subscription. If the administrator does not re-validate the license, regular users will be prohibited from logging into Sugar until the license is successfully validated by the administrator.

Re-validating the License

Although Sugar automatically re-validates your license once every 90 days, there may be special circumstances where administrators must re-validate the license via License Management. For example, if you renew your subscription after the expiration date or if you purchase additional users or license types mid-term, you will have to re-validate the license via Admin > License Management in order to update your Sugar account with the new subscription.

The fields in the License Validation panel are as follows:

- **Validation Key**: System generated validation key associated with your Sugar subscription.
- **Validation Key Expiration**: The date the validation key expires. The expiration date is typically 90 days from the last successful validation date.
- **Status**: The status displaying the timestamp of the last failed or successful validation.

Use the following steps to re-validate the license in Sugar:

1. Navigate to Admin > License Management.
2. Click the Re-validate button.

The system will communicate with the License Validation server to validate your license based on your Sugar subscription. If the re-validation is successful, then the status will reflect the date and time of the successful validation. If the system fails to connect successfully with the License Validation server and you cannot re-validate your license, use the Manual Validation option at the bottom of the License Validation panel.

Manual Validation

If your system fails to communicate successfully with the License Validation server through the internet, you have the option to perform a manual validation via Admin > License Management.

Use the following steps to perform a manual validation in Sugar:

1. Navigate to Admin > License Management.
2. Click the Manual Validation link located at the bottom of the License Validation panel.
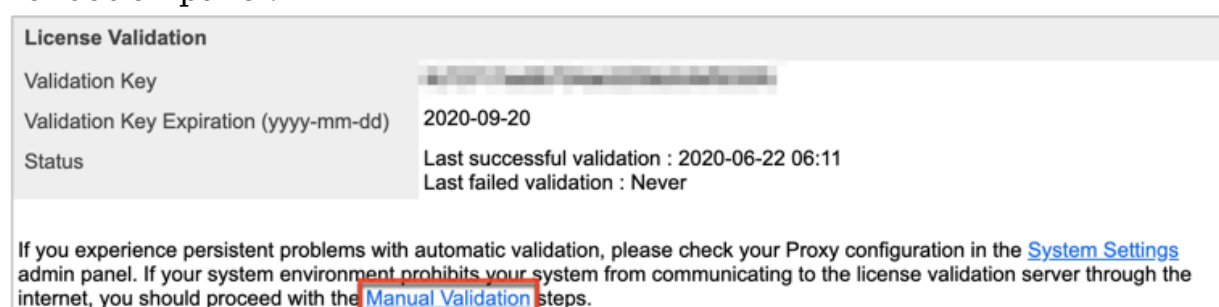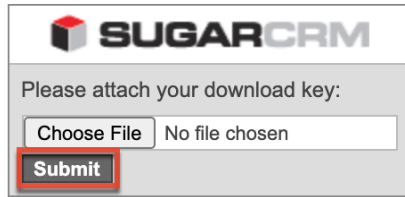
3. Click the Export Download Key button to export the sugarkey.lic file. Click "Save" in the pop-up window to save the file to your local machine.
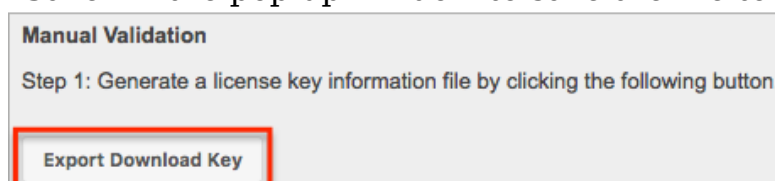
4. Go to http://updates.sugarcrm.com/license and submit the sugarkey.lic file
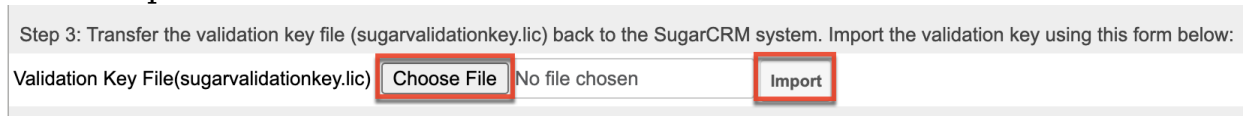
for validation.

Note: If the validation is successful, the validation key file (sugarvalidationkey.lic) will be generated, and the system will prompt you to save the file.

5. Log back into your instance and navigate to the Manual Validation page (Admin > License Management > Manual Validation).
6. On Step 3, choose the sugarvalidationkey.lic file on your local machine and click "Import".

Once the validation key is imported successfully, you have completed the manual validation process. Sugar will update the validation status along with the Validation Key Expiration date for the license key.

Connectors

The connector settings page allows administrators to configure and manage the various types of connectors to external data sources that integrate with Sugar. A number of different connectors (e.g. Citrix GoToMeeting) come out-of-the-box with Sugar and are enabled by default to allow users to easily view external data via their instance.

Please note that connectors can be disabled and configured accordingly via Admin > Connectors. Developers in your organization can also create connectors to other data sources, which can be uploaded via Module Loader. For more information on how to upload and install packages in Sugar, please refer to the Module Loader documentation. You can also search for other available connectors via Sugar Exchange (https://sugarexchange.sugarcrm.com).

Setting Connector Properties

Many connectors use web services and require certain connector properties (e.g. API Key, API Secret) to be configured prior to use. To configure the connector properties, simply click the Set Connector Properties button on the Connector Settings page.

The Set Connector Properties page displays a tab for each connector that must be configured in order to use in Sugar. The tabs will include the necessary steps or a link for you to obtain the information (e.g. API Key, API Secret) needed to set up the connector. Once the necessary information has been entered, click "Save" to preserve your settings.

The following connectors and their properties are available to configure:

Connector	Property	Description
Twitter	API Key	The API Key provided by Twitter
	API Secret	The API Secret provided by Twitter
Microsoft	Client ID	The Client ID provided by Microsoft
	Client Secret	The Client Secret provided by Microsoft
Google	Client ID	The Client ID provided by Google

	Client Secret	The Client Secret provided by Google
[GoToMeeting](#)	Consumer Key	The Consumer Key provided by GoToMeeting
IBM SmartCloud	OAuth Consumer Key	The OAuth Consumer Key provided by IBM
	OAuth Consumer Secret	The OAuth Consumer Secret provided by IBM

Please note that Sugar's WebEx integration is configured via the External Accounts tab of the user's profile. Since WebEx does not have global properties to configure, it will not appear on the Set Connector Properties page.

For more information on configuring the WebEx application, please refer to the [Getting Started](#) documentation in the Application Guide.

Enabling Connectors

In order to utilize the connectors in Sugar, administrators should ensure that they are enabled properly. Please note that certain connectors are enabled for the entire application while some allow you to enable specific modules for the connector. Simply click the Enable Connectors button on the Connector Settings page to configure the modules that should be enabled for certain connectors.

Enable Connectors
Select which modules are enabled for each connector.

The Enable Connectors page will display a tab for each connector that is available in your Sugar instance. Connectors, where you can enable specific modules for, will display the Enabled and Disabled columns where you can drag and drop the desired module from the Disabled column to the Enabled column. Please note that you can enable the connector for any modules (e.g. Accounts, Contacts) that have a standard record view (for Sidecar modules) or detail view (for legacy modules) layout in Sugar.

Mapping Connector Fields

Some connectors query external services based on fields in Sugar. These mappings can be customized to use different fields based on your organization's needs. To configure the field mappings, simply click the Map Connector Fields button on the Connector Settings page.

Map Connector Fields
Map connector fields to module fields in order to determine what connector data can be viewed and merged into the module records.

The Map Connector Fields page has a tab for each connector that has field mappings available. Each of the enabled module(s) will display the connector fields and will need to have the corresponding Sugar field selected from the dropdown list. If the connector is enabled for multiple modules, be sure to select the proper fields for each module. Once the field mapping is set up properly, click "Save" to preserve your changes.

Please note that the connector fields may not always match up with a stock field in Sugar. If you wish to capture and map certain fields from the connector to Sugar, you will need to create new fields via Admin > Studio. For more information on how to create fields in Studio, please refer to the [Studio](#) documentation.

Managing Connector Search

Connectors that have multiple fields for mapping need to specify which fields are to be used when searching for data in the module. To designate the connector fields for search, click the Manage Connector Search button on the Connector Settings page. Please note that there are no connectors that come out-of-the-box with Sugar that have search fields defined, so no connectors will be available to configure on this page.

Manage Connector Search
Select the connector fields to use to search for data for each module.

The Manage Connector Search page will normally display a tab for every connector that needs connector fields defined for search. The available search fields are limited to the input parameters of the connector being used. To enable a field for search, simply drag and drop the desired field from the Available column to the Default column. Once the necessary field(s) have been selected, click "Save" to preserve your changes.

OAuth Keys

OAuth is an open standard for authorization that enables users to share private resources stored on one site with another site without divulging personal credentials such as user name and password. OAuth works with a public consumer key and a private consumer key. Together, these keys identify which application connects to the service. It is the choice of the Sugar administrator to decide how

many different keys to have and whom to give them to. Please refer to the [User Interface](#) documentation for more information on working with the OAuth Keys module and performing actions such as searching, editing, and deleting records.

Note: The system generated OAuth Support Portal Key cannot be modified and should not be deleted.

OAuth Keys Fields

The OAuth Keys module contains a number of stock fields that 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
Consumer Key Name	The name or designation of the OAuth Key.
Consumer Key	Public key. A user name is a suitable consumer key value.
Consumer Secret	Private key. A password is a suitable consumer secret value. **Note**: The private key is not sent when making a connection.
OAuth Version	The version of the OAuth protocol/framework to use. (OAuth 1.0, OAuth 2.0)
Description	A description or other information about the OAuth key.

Creating OAuth Keys

There are various methods for creating OAuth keys in Sugar including via the OAuth Keys module and via duplication. The full edit view layout opens when creating the OAuth keys directly from the OAuth menu and includes all of the relevant fields for your organization's OAuth keys. The quick-create form is a shortened version of the OAuth Keys edit view and typically contains fewer fields.

Creating via OAuth Keys Module

One of the most common methods of OAuth key creation is via the Create OAuth

Key option in the OAuth Keys module tab. This opens up the edit view layout which allows you to enter all the relevant information for the OAuth key.

Use the following steps to create an OAuth key via the OAuth Keys module:

1. Navigate to Admin > OAuth Keys.
2. Click the triangle in the OAuth Keys module tab and select "Create OAuth Key".
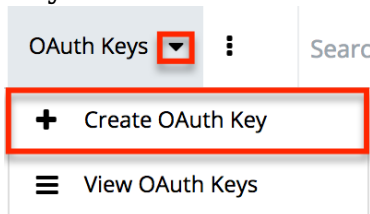
3. Enter appropriate values for the [Fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
4. Once the necessary information is entered, click "Save".

Creating via Duplication

You can also create a new OAuth key by duplicating an existing record. The duplicate option is useful if the key you are creating has similar information to an existing OAuth key.

Note: The system-generated OAuth Support Portal Key cannot be duplicated.

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

1. Navigate to an OAuth key record's detail view.
2. Select "Duplicate" from the Actions menu.
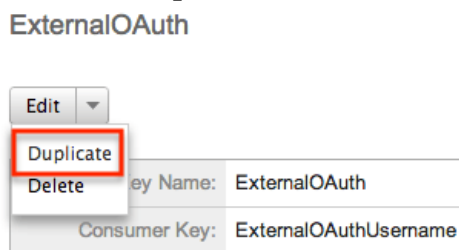
3. The displayed edit view is pre-populated with the original key's values.
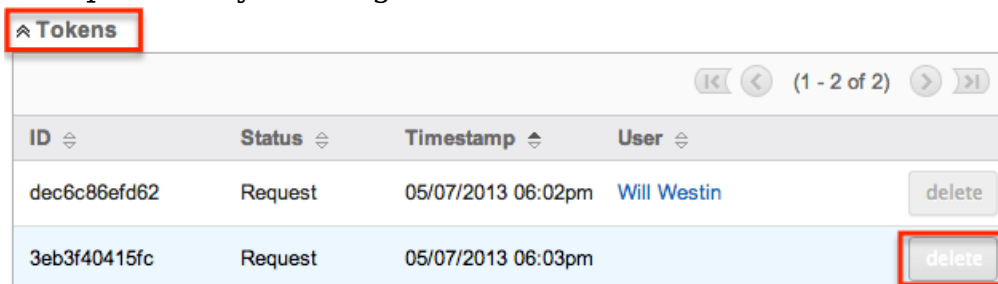
Update the necessary fields, then click "Save".

Note: Consumer Key and OAuth Version fields cannot be edited after creation. If either of these fields needs to be changed, you must create a new OAuth key.

Tokens

Beneath an OAuth key record's fields is a subpanel containing related token records. Tokens are created when the user establishes an OAuth connection with the OAuth key pair. These are connections between the Sugar user, the OAuth keys, and the permissions to enable the external application to access data. Tokens created for each OAuth connection are listed in the Tokens subpanel of the corresponding OAuth Keys detail view page. The Tokens subpanel can be collapsed or expanded by clicking the double arrow to the left of the subpanel's name.

To delete a token from an OAuth key, choose "Delete" from the far right of the record's row.

Sugar Updates

The Sugar Updates page allows administrators to check for the latest available Sugar versions. By default, Sugar automatically checks for updates on a periodic basis to see if any version updates are available for your instance. If a new version update is available, the Sugar Updates link in the Administration page will appear red and display the latest Sugar version next to it. Administrators can uncheck the automatic updates option in the Sugar Updates page if they do not wish to have the system automatically check for updated version releases.

Use the following steps to perform a manual check for Sugar updates:

1. Navigate to Admin > Sugar Updates.
2. Click the Check Now button to see if a new update of Sugar is available.

If there is an available version update, a message will appear below the Check Now button with the latest version along with a message to visit store.sugarcrm.com/download to retrieve and download the latest version. Please note that clients hosted on Sugar's cloud service are normally upgraded by the SugarCRM team on a predetermined schedule as releases are made available. On-Site clients will need to perform the upgrade themselves as Sugar is hosted on their servers. If the system detects that you have the latest version of Sugar, then the message will inform you that you have the latest version available.

Import Wizard

Import Wizard allows administrators to launch an import for any import enabled module without navigating to the module itself. After selecting "Import Wizard" from the Admin menu, you can select a module to perform an import on.

After selecting the module, click "Next" to continue the import. The steps to complete the import are identical to performing an import from the module. For more information on how to perform an import, please refer to the Import documentation in the Application Guide.

Upgrade Wizard

The Upgrade Wizard allows on-site customers to upgrade their Sugar instance to the latest software version. The Upgrade Wizard is only available for administrators of on-site installations. For steps to complete an on-site upgrade using the wizard, please refer to the Installation and Upgrade Guide for your on-site version of Sugar.

Repair

Repair allows administrators to perform common maintenance routines on their instance of Sugar. The repair menu is available to only administrative users and can be accessed through Admin > Repair.

For more information on the different repair options available, please refer to the Repair documentation in the Administration Guide.

Diagnostic Tool

Diagnostic Tool allows administrators to create a file with many diagnostic and configuration details. This tool will collect basic system information regarding Sugar and server configuration and place it all into a zip file to help debug or diagnose issues. The Diagnostic Tool has options that you can turn on and off to include only specific configuration data. Select one or more of the following available options:

Option	Description
SugarCRM config.php	Includes a copy of the config.php file from the root directory of Sugar. This file contains many useful system settings options in Sugar. **Note**: The database password contained in this file is replaced with asterisks before sending for security purposes.
SugarCRM Custom directory	Includes a copy of the entire custom directory in Sugar
Phpinfo()	Includes the output of the PHP function phpinfo() saved to an HTML file. The phpinfo() function returns information about how PHP is configured on the server running Sugar including the version of PHP, the loaded Extensions,

	and more.
MySQL - Configuration Table Dumps	Includes an HTML file for each configuration table in Sugar. The file has three sections: field definitions, indexes, and data.
MySQL - All Tables Schema	Includes an HTML file titled MySQLTablesSchema.html which has two sections for each table in Sugar: field definitions and indexes.
MySQL - General Information	Includes an HTML file titled MySQL-General-info.html. This file contains some basic information about the MySQL database Sugar is running on such as version number and character sets.
MD5 info	Includes a PHP file that shows any file in your instance of Sugar that has a different hash than the stock file. This can indicate which files are customized and where they are located in your file system.
Copy files.md5	Includes the list of all files and their original MD5 hash in a file titled files.md5 **Note**: Only available when the MD5 info option above is selected.
Copy MD5 Calculated array	Includes the list of all files and their current hash in a PHP file titled md5_array_calculated.php **Note**: Only available when the MD5 info option above is selected.
BeanList/BeanFiles files exist	Includes an HTML file titled beanFiles.html. This file contains a list of the modules in Sugar and checks all the references for that module to make sure they are correct.
SugarCRM Log File	Includes a copy of the current log file for Sugar.
Sugar schema output (VARDEFS)	Includes an HTML file titled vardefschema.html which contains detailed metadata on each table in Sugar.

The more options selected, the bigger the resulting zip file will be. Select the desired options and click "Execute Diagnostic".

Once the diagnostic tool is finished, select "Download the diagnostic file" to download the zip file containing the results to your computer.

Optionally, you can then select "Delete the Diagnostic file" to remove it from the server. Large diagnostic files should be deleted from the server as they can pile up and take necessary disk space.

Tracker

Tracker allows administrators to configure the system to track certain user actions and information for Sugar modules. This information is used in tracker reports and dashlets. By default the tracker options are disabled.
Use the following options to record tracker data:

- **Tracker Actions**: Tracks user actions such as modules accessed and records saved.
- **Tracker Sessions**: Tracks active users' session data such as session length.
- **Tracker Performance**: Tracks system performance such as database round trips, number of files accessed, server response time, and memory usage.
  Note: This option can cause performance issues and should not be enabled in a production environment.
- **Tracker Queries**: Tracks any query that takes longer than the specified slow query time threshold and saves the data to the database. Tracker queries logs the query, how many times it has been run, the last time ran, and the average seconds the query took. "Log slow queries" also needs to be selected before this option tracks data.
  Note: This option can cause performance issues and should not be enabled in a production environment.
- **Log slow queries**: Select this option to log queries that take longer than the slow query time threshold to the sugar log. This is useful for performance debugging.
  Note: This option can cause performance issues and should not be enabled in a production environment.
- **Number of days of Tracker data to store when Scheduler prunes the tables**: Specify the number of days of data to be retained. The Prune Tracker Tables scheduler will remove any tracker records older than the specified number of days. For more information on the Prune Tracker Tables scheduler, please refer to the [Prune Tracker Tables](#) section of the Scheduler documentation in the Administration Guide.
- **Slow query time threshold (msec)**: Specify a threshold in milliseconds to begin logging slow queries at. If "Log slow queries" is selected, queries that take longer to process than the threshold duration will be recorded in the Sugar Log. If "Tracker Queries" is selected, queries will be logged to the database.

Select the desired settings and click "Save" to preserve your changes.

Note: Changing the Log slow queries and Slow query time threshold values will also change them in Admin > System Settings.

Scheduler

Scheduler provides administrators with a method to automate the execution of custom and system processes. The Scheduler menu is available to only administrative users and can be accessed through Admin > Scheduler.

For more information on the different schedulers available, please refer to the Schedulers documentation in the Administration Guide.

PDF Manager

PDF Manager allows administrators to create and manage templates for generated PDF files for any deployed module, custom or standard. The PDF Manager is available to only administrative users and can be accessed through Admin > PDF Manager.

For more information on the PDF Manager, please refer to the PDF Manager documentation in the Administration Guide.

Mobile

The Mobile settings on the Administration page allow administrators to configure what modules they want enabled or disabled for Sugar Mobile and the browser-based Sugar mobile application. In addition, you can enable the mobile offline capability for your instance for Sugar Mobile.

The browser-based Sugar mobile application allows users to access various Sugar modules (stock and custom modules) via a web browser on a smartphone or PDA. Sugar Mobile is a native mobile application that enables users to access Sugar from mobile devices. For a list of supported devices for Sugar Mobile, please refer to the [Mobile Supported Platforms](#) page.

You can add, edit, and remove fields, including Calculated Value fields, to customize the mobile layouts via Admin > Studio. For more information on configuring fields, please refer to the [Fields](#) section of the Developer Tools documentation. For more information on configuring the mobile layouts, please refer to the [Mobile Layouts](#) section of the Developer Tools documentation.

Note: Calculated Value fields will not be updated in real-time for mobile edit view layouts.

Configuring Sugar Mobile

You can configure what modules are available for use in Sugar Mobile via Admin > Mobile. Please note that the Bug Tracker, Campaigns, Knowledge Base, Products, and Targets modules are not available for Sugar Mobile. For more information on enabling modules for Sugar Mobile, please refer to the [Enabling Modules for Mobile Access](#) section of this documentation.

Configuring Mobile Browser Access

The modules enabled for use via Admin > Mobile will also apply to the browser-based Sugar mobile application. For more information on enabling modules for the browser-based Sugar mobile application, please refer to the [Enabling Modules for Mobile Access](#) section of this documentation. Please note that the Reports module is not available for the browser-based Sugar mobile application.

Enabling Modules for Mobile Access

Use the following steps to enable modules for mobile access:

1. Navigate to Admin > Mobile.
2. To enable a module for the browser-based and native Sugar mobile application, drag and drop the module from the Disabled Modules column to the Enabled Modules column.
3. To disable a module, drag and drop the module from the Enabled Modules column to the Disabled Modules column.
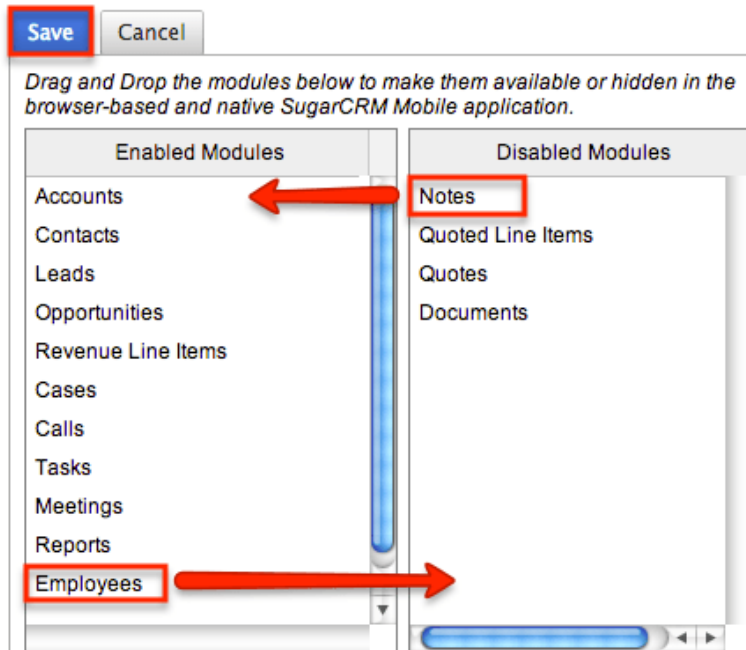
4. Click "Save" to apply the changes made to Sugar Mobile and the browser-based Sugar mobile application.

Enabling Offline Mobile Access

You can also allow mobile offline capabilities for your instance in Sugar Mobile by marking the Offline enabled checkbox in Admin > Mobile. Enabling offline access allows the user's mobile device to cache records for offline viewing as well as buffer changes they make to records while offline. The changes made will be synced once they are reconnected. Please note that the offline option must be enabled in Sugar first before users can enable the offline capabilities on their devices. For more information on enabling offline access for mobile devices, please refer to the [Sugar Mobile User Guide](#) for your specific mobile device type (iOS, Android).

Drag and Drop the modules below to make them available or hidden in the browser-based and native SugarCRM Mobile application.

Last Modified: 2021-07-20 14:09:34

Repair

Overview

The repair functions in Sugar allow administrators to perform common maintenance routines on their instance of Sugar. The repair menu is available to only administrative users and can be accessed through Admin > Repair. The following sections are available options from the repair menu.

Quick Repair and Rebuild

The quick repair and rebuild is the most commonly used repair option and should be performed after significant changes have been made to your instance of Sugar. If you notice inconsistencies with module layouts or fields as you have customized them via Studio, this option is normally the best first course of action to try and correct the issue. Sugar caches files to help access necessary files quickly. This option clears out many of the cached files in Sugar which allows new versions of the files to be loaded. The quick repair and rebuild option performs the following

actions:

- **Clear Vardefs From Cache** : Deletes any *vardefs.php file in the cached modules folder
- **Clear Language Files From Cache** : Deletes any {Module Name}.lang.php file in the cached modules folder
- **Clear Template Files From Cache** : Deletes any *.tpl files in the cached modules folder
- **Clear JavaScript Files From Cache** : Deletes any *.js files in the cached modules folder
- **Clear JavaScript Language Files From Cache** : Deletes any *.js files in the cached jsLanguage folder
- **Clear Dashlet Files From Cache** : Deletes any *.php files in the cached dashlets folder
- **Clear Sugar Feed Files From Cache** : Deletes the Sugar Feed files in cached modules folder
- **Clear Smarty Template Files From Cache** : Deletes any *.tpl.php files in the cached smarty templates folder
- **Clear Theme Files From Cache** : Deletes theme files in the cached theme folder for all themes in Sugar
- **Clear XML Files From Cache** : Deletes any *.xml files in the cached xml folder
- **Clear Search Files From Cache** : Deletes the unified_search_modules.php file in the cached module folder
- **Clear External API Cache Files** : Deletes the external API cache PHP and JavaScript files in the cached include folder
- **Clear Additional Cache Files** : Loops through the cached API folders and deletes any *.php files as well as the cached clients folder
- **Clear PDF Font Cache Files** : Deletes the cached PDF font list file
- **Rebuild Extension Files** : Rebuilds language files, extensions, dashlet containers, relationships, and the table dictionary; this step also clears any cached files by APC or WinCache, resets the Zend accelerator, clears eAccelerator's cache, and clears XCache cached files
  Note : These functions will only run if the associated systems are installed and running.
- **Rebuild Audit Tables** : Creates audit tables for any module that has audit enabled and where the audit table does not already exist; the results for each table are printed on the page
- **Repair Database Tables** : Checks to make sure the database is in synch with the table dictionary and vardef files; any missing tables, columns, and indexes will be scripted to be recreated as well as any column properties that are incorrectly set in the database. The screen will display any database changes that should be made. Click "Execute" to execute the script to apply the changes to the Sugar database or click "Export" to save the script to a SQL file.

```
/* Table : accounts */
/*COLUMNS*/
/* INDEXES */
/*MISSING INDEX IN DATABASE - idx_accnt_assigned_del -index  ROW */
ALTER TABLE accounts   ADD INDEX idx_accnt_assigned_del (deleted,assigned_user_id);
/*Checking Custom Fields for module : Accounts */
CREATE TABLE accounts_cstm (id_c char(36)  NOT NULL  , PRIMARY KEY (id_c)) CHARACTER SET utf8 COLLATE utf8_general_ci;
/*MISSING IN DATABASE - test_c -  ROW*/
ALTER TABLE accounts_cstm add COLUMN test_c varchar(100)  NULL ;
/*MISSING IN DATABASE - testint_c -  ROW*/
ALTER TABLE accounts_cstm add COLUMN testint_c int(150)  NULL ;
```

Execute   Export

Upgrade Teams

The Upgrade Teams option performs some cleanup regarding team records in Sugar. This can be useful to restore the private teams for all users in the event they become corrupted or are removed for any reason. The upgrade teams option performs the following actions:

- **Global Team** : Creates or restores the global team if it does not exist or has been deleted. All users are then assigned to the global team if not already.
- **Private Teams** : Creates a private team for every user in the system that does not already have a private team and assigns the user to their private team.

The results are printed on the screen as to what teams already existed and what teams were created.

Expand Column Width

The expand column width option provides a fix for some limitations of MSSQL when requiring multi-byte characters in the database. This limitation only exists for systems running on a MSSQL database while using the MSSQL Drivers for PHP. This function is not available and not necessary to be run on any of the currently supported database platforms.

Note: We recommend running Sugar on at least version 2.0.1 of the SQLSRV

Drivers.

Use the following steps to run the Expand Column Width repair option:

1. Select "Expand Column Width" from the Admin > Repair screen.
2. Select from the dropdown which of the following actions you would like to take:
   Display SQL : Displays the appropriate sql commands on the screen.
   Export SQL : Creates a .sql file containing the appropriate SQL commands.
   Execute SQL : Executes the SQL commands on your database.
3. Select "Go" to perform the selected action.

What action would you like to take?
Execute SQL   Go
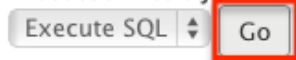
4. The script takes any field in the database that is type varchar, char, or text and increases the length of the field. The new length is set to three times the current length, or if that is higher than 255, the length is set to 255.

Rebuild .htaccess File

Rebuild .htaccess File option creates or updates the .htaccess file in the root of the Sugar directory. The .htaccess file contains specific commands to prevent unauthorized access to certain files and directories on your webserver. File permissions need to be configured correctly in order for Sugar to write to the .htaccess file. If writing to the file fails, the expected contents for the file will be printed on the page.

Note: If you have additional lines to add to the .htaccess file, place them outside of the "# BEGIN SUGARCRM RESTRICTIONS" and "# END SUGARCRM RESTRICTIONS" lines or they will be removed when running this repair function.

Rebuild Config File

The Rebuild Config File option takes the config.php file in the root directory of Sugar and rebuilds it to have all default values for any options not specified directly. It first runs a check to make sure Sugar can write to the config.php file and will return to you if it can or not. When ready to rebuild the config file select "Rebuild".

Config Check	The config.php file is ready for rebuild.
Rebuild Config File	Rebuild
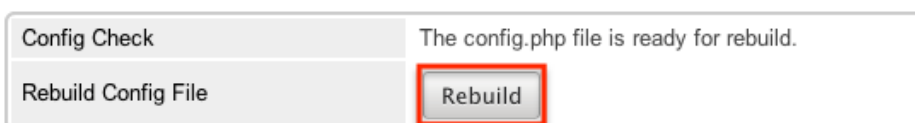
The default values for the config will be merged with any custom values currently

set and will be loaded into the config.php file.

Rebuild Sugar Logic Functions

The Rebuild Sugar Logic Functions rebuilds the cache files for all Sugar logic functions in the system. The Sugar logic functions are primarily used as formulas in field definitions. The results of the repair are shown on the screen.

Rebuild Relationships

Rebuild Relationships clears out the relationship cache and data and rebuilds it from the vardef files. Custom and stock relationships are all rebuilt. This repair option is good to run after an upgrade or when installing or uninstalling custom modules. The results of the repair are shown on the screen.

Rebuild Schedulers

The Rebuild Schedulers option removes all schedulers and recreates schedulers that come with Sugar by default. If you have customized the Active/Inactive flag, the frequency the job runs, or even deleted a job this repair option will restore all settings back to their original default value and recreate any deleted default schedulers.

Note: This also deletes any custom schedulers added to Sugar. If you have made changes to the default schedulers or created custom schedulers, please backup the details of each scheduler before running this repair.
The schedulers and their default settings are listed below:

Name	Interval	Range	Status
Process Workflow Tasks	As often as possible.	01/01/2005 05:30am - 12/31/2020 06:59pm	Active
Run Report Generation Scheduled Tasks	On the hour; 06:00am	01/01/2005 02:15am - 12/31/2020 06:59pm	Inactive

Prune Tracker Tables	On the hour; 02:00am; 1st	01/01/2005 12:00pm - 12/31/2020 06:59pm	Active
Check Inbound Mailboxes	As often as possible.	01/01/2005 02:00am - 12/31/2020 06:59pm	Active
Run Nightly Process Bounced Campaign Emails	On the hour; From 02:00am to 06:00am	01/01/2005 02:00pm - 12/31/2020 06:59pm	Active
Run Nightly Mass Email Campaigns	On the hour; From 02:00am to 06:00am	01/01/2005 08:15am - 12/31/2020 06:59pm	Active
Prune Database on 1st of Month	On the hour; 04:00am; 1st	01/01/2005 02:15am - 12/31/2020 06:59pm	Inactive
Update tracker_sessions Table	As often as possible.	01/01/2005 01:00am - 12/31/2020 06:59pm	Active
Run Email Reminder Notifications	As often as possible.	01/01/2008 08:30am - 12/31/2020 06:59pm	Active
Clean Jobs Queue	On the hour; 05:00am	01/01/2012 04:15am - 12/31/2030 06:59pm	Active
Create Future TimePeriods	On the hour; 11:00pm	01/01/2012 01:30am - 12/31/2030 06:59pm	Active

Rebuild WorkFlow

Rebuild Workflow deletes files in the custom workflows folder for each module and

then rebuilds the files from the workflow data in the database. This repair also verifies the proper logic hooks are in place to properly fire the workflows and rebuilds any plug-ins that are installed.

Rebuild Javascript Languages

The Rebuild Javascript Languages function deletes all files in the cached jsLanguage folder and deletes any {Module Name}.lang.php file in the cached modules folder. The cached files will be rebuilt when they are needed.

Rebuild JS Grouping Files

Rebuild JS Grouping Files takes the many different JavaScript files that are required with Sugar and concatenates them together into the cache directory.

Note: The process will continue working if you navigate away from this page, but if you wait you will see a notification on the page when it is complete.

Rebuild Sprites

Rebuild Sprites takes images in the following directories:

- ./include/images
- ./themes
- ./custom/themes

Creates the sprites and metadata files in the ./cache/sprites/ folder.

Note: The process will continue working if you navigate away from this page, but if you wait you will see a notification on the page when it is complete.

Repair Non-Lowercase Fields

The Repair Non-Lowercase Fields option takes any custom field defined in Sugar and, if the field contains an upper case letter, it will change the field to be lowercase. The database, vardef files, and views are all searched through and corrected for and uppercase fields. This option also clears any vardef files from the cache when finished.

Repair Teams

The Repair Teams option runs a quick check against the database for every user. It performs the following checks:

- Users not in the global team
- Users who do not have a private team
- Users who are not a member of a team that a user who reports to them is a member of

If any of the checks return true, the page will indicate that records were found and the associated action will be selected by default. Select the options you wish to perform and click "Rebuild".

The selected options will perform the following:

🔧 Repair Non-Lowercase Fields	Repair mixed-case custom table(s) and metadata file(s) to fix issues wh lowercase field names
🔧 Repair Teams	Rebuilds private team memberships based on user reporting hierarchy
🔧 Repair Roles	Repairs Roles by adding all new modules that support Access Controls, new Access Controls to existing modules

- **Rebuild access to global team** : Create a global team if one does not exist and loops through every user and adds them to the global team.
- **Rebuild access to private team** : Loops through every user and creates a private team if one does not exist, and then adds the user to their private team.
- **Rebuild team hierarchy** : Loops through every user and makes sure every manager is included in their employees' teams. This ensures that if Sally reports to Jim, that Jim can see all of Sally's records.
  Note : Sugar prevents a loop from being created via the Reports To field. For more information on setting the Reports To field, please refer to the User Management documentation.
- **Clean up unused combinations of teams** : Searches the database for unused combinations of teams and deletes the records from the database.

The users looped through are displayed on the screen when complete.

Repair Roles

Repair Roles goes through every ACL enabled module and ensures that there are appropriate database records to allow roles to be used on the specified module. This repair is important to run after adding new modules via Module Loader or Module Builder to make sure all of the role options are available for the new

module. If there is a module that has ACL enabled for it, but the module does not show in the Roles section, then this repair option will add the module. The results of the modules accessed are printed on the screen.

Repair Inbound Email Accounts
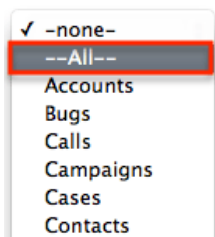
Repair Inbound Email Accounts loops through every active inbound email account in Sugar and verifies the settings configured. Any Inbound email account that fails to successfully repair will be listed on the page and will require someone to manually repair them by reentering a valid user name and password.

Remove XSS

The Remove XSS repair loops through the database and removes any malicious scripts from specified field types. Select a module from the dropdown, or select "All" to run for all modules.

Removes XSS Vulnerabilities from the database

Select a module to remove potential XSS strings. Select "All" to address every module.
Press execute to start the detection and removal process.

✓ –none–
--All--
Accounts
Bugs
Calls
Campaigns
Cases
Contacts

The page will then display the count of records that will be scanned, and repaired if necessary. Click "Execute" to being the repair.

Removes XSS Vulnerabilities from the database

Select a module to remove potential XSS strings. Select "All" to address every module.
Press execute to start the detection and removal process.

--All--   ▲▼   Execute

1768   Object(s) found

You will see the count of Object(s) Repaired incrementing as it is running. Once the repair is complete you will get a popup message saying "Done." and the count repaired should match the count of objects found.
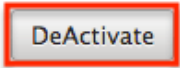
Repair Activities

Repair Activities takes Call or Meeting records where the status field does not equal "Held" and updates the end date based on the duration of the activity. If the status equals "Held" or the record is marked as deleted, this repair will skip it. The screen will show "Done" when complete.

Enable/Disable Seed Users

The Enable/Disable Seed Users option will either enable or disable the default users that are installed with Sugar when selecting a demo installation. If the first seed user retrieved from the database is set to "Active" then this option will give you the option to "Deactivate" the seed users, otherwise, you have the option to "Activate" the seed users.

Enable/Disable Seed Users   [DeActivate]

This option will set the status based on the option presented for all users that have an id that starts with "seed".

Note: If you did not populate Sugar with demo data when installing, this repair will return "No seed users" and will not do anything.

Clear Additional Cache

The Clear Additional Cache option loops through the cached API folders and deletes any *.php files as well as the cached clients folder. This option is also performed by the Quick Repair and Rebuild option. The screen will show "Done" when complete.

Last Modified: 2021-07-07 21:38:14

Schedulers

Overview

Schedulers in Sugar provide users with a method to automate the execution of

custom and system processes. Sugar comes with many default schedulers to perform jobs such as monitoring inbound emails, executing workflows, running reports and dispatching campaign emails. Schedulers are available only to administrative users and can be accessed through Admin > Schedulers.

Schedulers Fields

The Schedulers module contains a number of stock fields that come out of the box with Sugar. The following definitions are suggested meanings for the fields, but the fields may be leveraged differently to best meet your organization's needs.

Field	Description
Active From	Time the scheduler begins to be active per day
Active To	Time the scheduler stops being active per day
Date & Time End	Date and Time the scheduler will stop running on the specified interval
Date & Time Start	Date and Time the scheduler will begin running on the specified interval
Execute If Missed	Specifies if a scheduler should be executed during the next cron run in the event that cron did not run at the exact time a job is scheduled for
Interval	How often and when the schedule will run, defaults to every day, every minute
Job	The job to execute on the defined schedule
Job Name	The name or designation of the scheduler
Status	The current status of the scheduler (i.e. Active, Inactive)

Note: Any times configured for schedulers will be based on the admin user's time zone (user id = '1').

Default Schedulers

The default schedulers that packaged with Sugar are required for different

activities throughout the application. The following lists the default schedulers and their default settings:

Name	Interval	Status
Activity Stream Purger	On the hour	Inactive
Check Inbound Mailboxes	As often as possible.	Active
Clean Jobs Queue	On the hour; 05:00am	Active
Create Future TimePeriods	On the hour; 11:00pm	Active
Elasticsearch Queue Scheduler	As often as possible.	Active
Process Time-Aware Schedules	On the hour	Active
Process Workflow Tasks	As often as possible.	Active
Prune Database on 1st of Month	On the hour; 04:00am; 1st	Inactive
Prune Old Record Lists	As often as possible	Active
Prune Tracker Tables	On the hour; 02:00am; 1st	Active
Publish approved articles & Expire KB Articles	On the hour; 05:00am	Active
Rebuild Denormalized Team Security Data	Every 15 minutes	Inactive
Remove diagnostic tool files	On the hour; 04:00am; Sunday	Active
Remove temporary files	On the hour; 04:00am	Active
Remove temporary PDF files	On the hour; 04:00am	Active
Run Active Data Archives/Deletions	On the hour; 10:00PM; Saturday	Active
Run Email Reminder Notifications	As often as possible.	Active
Run Nightly Mass Email Campaigns	On the hour; From 02:00am to 06:00am	Active
Run Nightly Process Bounced Campaign Emails	On the hour; From 02:00am to 06:00am	Active
Run Report Generation Scheduled Tasks	On the hour; 06:00am	Inactive
Sugar Heartbeat	On the hour; 04:00am	Active

[Update tracker_sessions Table](#)	As often as possible.	Active

Activity Stream Purger

The Activity Stream Purger scheduler can help manage the number of activity stream records in the database. The scheduler is inactive by default with an interval set to run on the hour when enabled. As your company uses Sugar, the number of activity records will grow considerably over time which can result in performance degradation. For this reason, it is strongly recommended to enable the scheduler and set it to run at least weekly, if not daily, to prune older records from the activities table. By default, the scheduler will remove records that are older than 6 months as of the current date from the activities table. Please note that user posts, comments, and attachments are preserved but all other activity stream records generated from field updates, new record creation, linking/unlinking records will be removed by the scheduler.

Note: The number of months to keep activity records is configurable through the sugar config files by modifying the value of [$sugar_config['activitystreamcleaner']['months_to_keep']](#). In addition, you can modify the value of [$sugar_config['activitystreamcleaner']['keep_all_relationships_activities']](#) if you wish to keep link/unlink-type activity records in the table.

Check Inbound Mailboxes

The Check Inbound Mailboxes scheduler is active and runs as often as possible by default. This scheduler will retrieve any unread email from active group inbound email accounts configured in the system. Personal and bounce mail accounts are not checked by this scheduler. If the group email account is configured to create cases or to send auto-reply emails, then this scheduler will handle those tasks as well. For more information on how to set up and configure a group inbound email account, please refer to the [Email](#) documentation.

Clean Jobs Queue

The Clean Jobs Queue scheduler is active and runs every day at 5:00 AM by default. The jobs queue is essentially a log of when each scheduler has run. This scheduler will go through the job queues and either soft or hard delete old records in the jobs queue. A soft delete is simply hiding the record from Sugar, but keeping it in the database for recovery if necessary. A hard delete is permanently deleting

it from the database. Job queue records will be soft and hard deleted by this scheduler with the following criteria:

- **Soft Delete** : Completed more than 7 days ago.
- **Hard Delete** : Completed more than 21 days ago.

Note: The number of days for a soft and hard delete are configurable through the sugar config files by modifying the values of $sugar_config['jobs']['soft_lifetime'] and $sugar_config['jobs']['hard_lifetime'].

Create Future TimePeriods

The Create Future TimePeriods scheduler is active and runs every day at 11:00 PM by default. When setting up the Forecasts module for the first time, you are prompted with what type of time period (Yearly or Quarterly) and how many future and past time periods you would like. This scheduler runs based off of those settings and creates new time period records as needed for forecast data entry.

For more information about configuring the time periods for forecasting, please refer to the Forecast Configuration documentation.

Elasticsearch Queue Scheduler

The Elasticsearch Queue Scheduler job is active and runs as often as possible by default. New records, revised records, and deleted records are queued to be processed by this scheduler and added to the full-text search index. Though this scheduler is set to run as often as possible, it can take a few moments before changes are available in global search results. For more information about Search, please refer to the Search documentation.

Process Time-Aware Schedules

The Process Time-Aware Schedules job is active and runs hourly. This scheduler processes entries in the time_aware_schedules table, which monitors and regulates time-based functions (e.g. the Status field on purchased line Item records).

Process Workflow Tasks

The Process Workflow Tasks scheduler is active and runs as often as possible by default. This scheduler processes and runs any time elapsed workflows are due to

run. If you utilize time-elapsed workflows, it is highly recommended to run this scheduler as often as possible to ensure the workflows are executed quickly.

For more information on creating workflows, please refer to the [Workflow Management](#) documentation.

Note: Workflows processed by this scheduler will be run by the admin user (user id = '1') unless the admin user is disabled.

Prune Database on 1st of Month

The Prune Database on 1st of Month scheduler is inactive and runs at 4:00 AM on the first day of every month. Sugar implements a soft delete feature when deleting records through the application. Instead of deleting the record right away, the system marks a field called deleted in the database for the record. This scheduler runs through every table in the Sugar database and deletes any record that has this deleted flag. This is beneficial to keep the database small and efficient but will remove the ability to recover accidentally deleted records. If you have a large database, we recommend activating this scheduler and running it once a month for performance.

Prune Old Record Lists

The Prune Old Record Lists scheduler is active and runs as often as possible by default. This scheduler job will clean up backend database entries Sugar uses when generating export files. Such entries that are older than 1 hour from the current date and time will be removed from the record_list database table.

Keeping this scheduler active will help prevent exports from failing due to size limitations.

Prune Tracker Tables

The Prune Tracker Tables scheduler is active and runs at 2:00 AM on the first day of every month by default. This scheduler will delete data in the tracker tables based on the tracker prune interval. This interval can be set from Admin > Trackers and defaults to 30 days if not set. Any record older than the specified amount of days will be deleted from the following tables:

- tracker
- tracker_sessions

- tracker_perf
- tracker_queries
- tracker_tracker_queries

Keeping this scheduler active helps ensure overall system performance is kept at optimum levels, as these tables are continually updated via common actions in the application. For more information on trackers and setting this interval, please refer to the [Tracker](#) documentation.

Publish Approved Articles & Expire KB Articles

The Publish Approved Articles & Expire KB Articles scheduler is active and is set to run daily at 5:00 AM by default. This scheduler publishes any Knowledge Base articles that have a status of "Approved" and were scheduled for a later publish date. It also checks for any articles that have reached their expiration date and changes their statuses to "Expired".

Rebuild Denormalized Team Security Data

The Rebuild Denormalized Team Security Data scheduler is inactive by default with an interval set to run every 15 minutes when activated. Team Security denormalization can significantly improve SQL query performance when there are a large number of Teams in an on-site Sugar instance. This feature relies on a separate Team security denormalization table that needs to be updated as records change to ensure Sugar's team security visibility rules are applied properly. When denormalization is enabled via the [perfProfile.TeamSecurity.default.use_denorm](#) configuration and inline updates are disabled via [perfProfile.TeamSecurity.inline_update](#), then the Rebuild Denormalized Team Security Data scheduler must be turned on to make sure the table is regularly updated.

Remove Diagnostic Tool Files

The Remove Diagnostic Tool Files scheduler is active and runs Sundays at 4:00 AM by default. The ./cache/diagnostic directory serves as a temporary directory for data generated by Sugar's Diagnostic Tool, which allows administrators and developers to capture basic system and server configuration details in order to diagnose problems in a Sugar instance. The tool places this data into a zip file on the server. The Remove Diagnostic Tool Files scheduler will remove any of these temporary files from the directory once a week during off-peak hours. For more information about the Diagnostic Tool, please refer to the [Diagnostic Tool](#) documentation.

Remove Temporary Files

The Remove Temporary Files scheduler is active and runs daily at 4:00 AM by default. Sugar uses a cache directory to store files such as images, documents, and installable modules uploaded by users. Some of these documents may be large in size and can cause performance issues. This scheduler will remove any unused files that are found in the ./uploads/tmp directory or in most user-configured upload directories. For more information about temporary file storage, please refer to the [Advanced Configuration Options](#) documentation.

Remove Temporary PDF Files

The Remove Temporary PDF Files scheduler is active and runs daily at 4:00 AM by default. The ./cache/pdf/ directory serves as a temporary directory for in-progress PDF files generated from reports, quotes, and other parts of Sugar. Upon successful completion of the PDF operation, the file is typically removed from the directory, but there may be circumstances where orphaned PDF files could remain in the directory. This scheduler will remove any PDF files from the directory during off-peak hours.

Run Active Data Archives/Deletions

The Run Active Data Archives/Deletions scheduler is active and runs weekly on Saturdays at 10:00 PM by default. This scheduler will look at the current list of data archive records configured from the [Data Archiver](#) module and, for each one that is marked as active, it will perform the specified archive or deletion. The completed jobs will be registered as records in the Archive Runs module and can be viewed from the subpanel of their parent data archiver records.

Run Email Reminder Notifications

The Run Email Reminder Notifications scheduler is active and runs as often as possible by default. This scheduler will send out email reminders for meetings and calls that have met or passed the reminder time. Meetings and calls need to have a status that does not equal "Held" in order for the email reminder to be sent to invitees.

Run Nightly Mass Email Campaigns

The Run Nightly Mass Email Campaigns scheduler is active and runs on the hour,

every hour from 2:00 AM to 6:00 AM by default. This scheduler will process any campaign emails waiting to be sent from the email queue up to the configured batch amount. If the number of emails to send per batch is set to 500, and this scheduler is set to run once an hour, then you will be sending 500 emails per hour. Please configure this scheduler and the number of emails to send per batch to allow the proper amount of email to be sent.

Note: Many email providers place limitations on email send rates such as emails per hour, emails per day, unique recipients, etc. Please check with your email provider to ensure that they will be able to process the volume of emails you desire to send through campaigns.

For more information on setting the number of emails sent per batch, please refer to the Email documentation.

Run Nightly Process Bounced Campaign Emails

The Run Nightly Process Bounced Campaign Emails scheduler is active and runs on the hour, every hour from 2:00 AM to 6:00 AM by default. This scheduler will retrieve any unread email from active bounce inbound mail accounts configured in the system. Bounce email accounts are important for receiving any bounced emails from a campaign. Emails in the bounce mail account must match all of the following criteria to be classified as a bounced email:

- 'From' email address must contain MAILER-DAEMON or POSTMASTER.
- 'Remove me' link from the original email must be in the email body.
- The originating email does not have a campaign activity log type of invalid email or send error.

We recommend setting this scheduler to run at the same time and interval as the Run Nightly Mass Email Campaigns scheduler. For more information on how to set up and configure a bounce inbound email account, please refer to the Email documentation.

Run Report Generation Scheduled Tasks

The Run Report Generation Scheduled Tasks scheduler is inactive by default with an interval set to run daily at 6:00 AM when activated. This scheduler executes any scheduled reports and emails the results to the designated user. If you want to utilize scheduled reports, please enable this scheduler, otherwise, the reports will not be emailed. We recommend running this scheduler as often as possible, this way if someone schedules a report for 6:15 AM, they will not have to wait until 7:00 to receive the report. For more information on scheduling reports, please

refer to the [Scheduled Reports](#) documentation.

Sugar Heartbeat

The Sugar Heartbeat scheduler is active with an interval set to run daily at 4:00 AM by default. This scheduler ensures that Sugar continues to receive heartbeat information even if no users have logged into your instance in the last three days. When this occurs, the Sugar heartbeat information will be sent automatically when cron runs.

Update tracker_sessions Table

The Update tracker_sessions Table scheduler is active and runs as often as possible by default. This scheduler updates the tracker_sessions table, setting all records that have a date older than six hours to not active. This ensures any user that is inactive for six hours or more will be logged out and their sessions will no longer be active. Please keep in mind that PHP settings on the server may be more restrictive than the six-hour limitation on inactivity this scheduler imposes.

Schedulers Module Tab

The Schedulers module tab can be accessed by navigating to the Administration page and clicking "Scheduler" in the System section. Once in the Schedulers list view, you can click the triangle in the Sugar Scheduler module 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 schedulers you last viewed in the module. The [Favorites menu](#) displays the list of schedulers you most recently marked as favorites in the module.
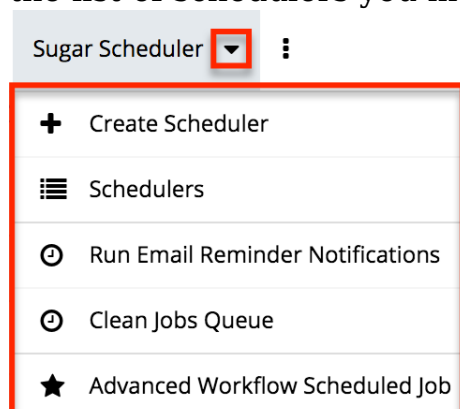
The Actions menu allows you to perform the following operations:

Menu Item	Description

Create Scheduler	Opens the edit view layout to create a new scheduler
Schedulers	Opens the list view layout to search and display schedulers

Creating Schedulers

There are various methods for creating schedulers in Sugar including via the Schedulers module and via duplication. The full edit view layout opens when creating the scheduler directly from the Schedulers menu and includes all of the relevant fields for your organization's schedulers. Schedulers can be created for built-in jobs within the application or they can be created to call a URL outside of Sugar.

Creating via Schedulers Module

One of the most common methods of scheduler creation is via the Create Scheduler option in the Sugar Scheduler module tab. This opens up the edit view layout which allows you to enter all the relevant information for the scheduler.

Use the following steps to create a scheduler via the Scheduler module:

1. Navigate to Admin > Scheduler.
2. Click the triangle in the Sugar Scheduler module tab and select "Create Scheduler".
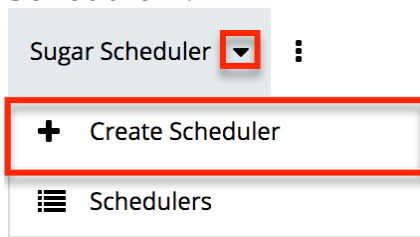
3. Enter appropriate values for the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
   Note: For more information on setting the advanced options for the interval, please refer to the Advanced Options section.
4. Once the necessary information is entered, click "Save".

Creating via Duplication

You can also create a new scheduler by duplicating an existing scheduler record. The Copy option is useful if the scheduler you are creating has similar information to an existing scheduler.

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

1. Navigate to a scheduler record's detail view.
2. Select "Copy" from the Actions menu.

3. The displayed edit view is pre-populated with the original scheduler's values. Update the necessary fields, then click "Save". For more information on setting the advanced options for the interval, please refer to the Advanced Options section.

Viewing Schedulers

There are various options available for viewing scheduler records in Sugar including via Schedulers list view, Schedulers detail view, and Schedulers Recently Viewed menu.

Viewing via List View

The Schedulers list view displays all scheduler records meeting the current search criteria. To access the list view, simply click the Schedulers module tab. While list view shows key scheduler fields, you can click the scheduler's name to open the record in detail view. For more information on viewing scheduler via list view, please refer to the [Schedulers List View](#) section.

Viewing via Detail View

The Schedulers detail view displays thorough scheduler information including all scheduler fields followed by the log records of when this scheduler has run. The detail view can be reached by clicking a scheduler record's link from anywhere in the application including from the Schedulers list view. For more information on viewing scheduler via detail view, please refer to the [Schedulers Detail View](#) section.

Viewing via Recently Viewed

As you work, Sugar will keep track of which scheduler you have recently viewed. Click the triangle in the [Sugar Scheduler module tab](#) to see a list of the three schedulers you most recently viewed. Clicking the scheduler name will open the scheduler in detail view.
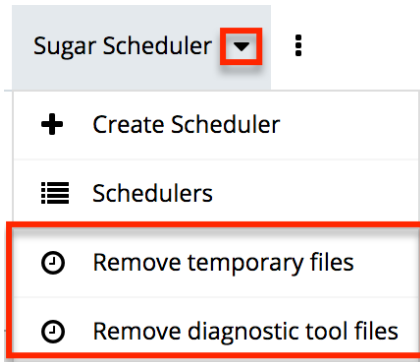
Searching Schedulers

The Schedulers list view includes a Basic 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 Schedulers 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 offers a few, commonly used fields for a simplified search experience. The buttons 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.

Schedulers

Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all scheduler records, simply click "Clear" and then "Search" to perform a blank search with no filters.

Schedulers List View

The Schedulers list view displays all scheduler records meeting the current search criteria. You can view the basic details of each scheduler within the field columns.

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.

Checkbox Selection

You can perform several actions on scheduler records directly from the list view by first selecting the desired records. To select individual scheduler records on the Schedulers list view, mark the checkbox on the left of each row. To select or deselect multiple scheduler records in the list view, use the options in the checkbox dropdown menu:

- **Select This Page** : Selects all records shown on the current page of scheduler results.
- **Select All** : Selects all records in the current search results across all pages of scheduler results.
- **Deselect All** : Deselects all records that are currently selected.
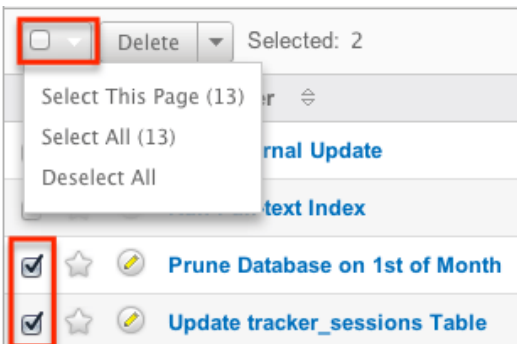
Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform various actions on the currently selected records.
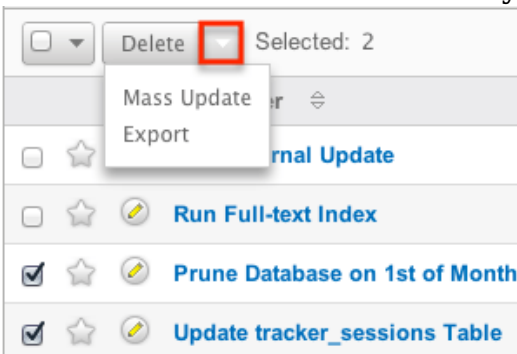
The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Delete	Delete one or more schedulers at a time
Mass Update	Mass update one or more schedulers at a time
Export	Export one or more schedulers to a CSV file

Favorite Designation

Users have the option to mark scheduler 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 Schedulers module tab. In the Schedulers list view, the star on the left of each schedule's row is yellow once marked to indicate a favorite schedule. For more information on marking records as favorites, please refer to the Favoriting Schedulers section of this documentation.
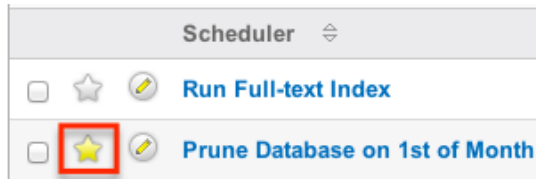
Column Sorting

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.
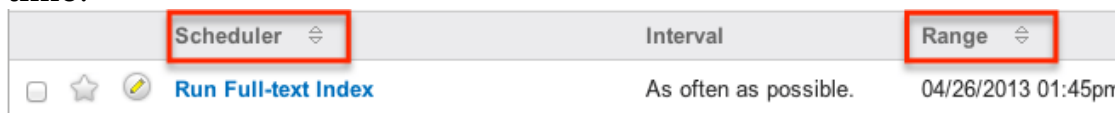
Schedulers Detail View

The Schedulers detail view displays thorough scheduler information including all scheduler fields which are grouped by default into the Overview, More Information, and Other panels. You can also view a scheduler's log which appears in beneath the scheduler fields. The detail view can be reached by clicking a

scheduler record's link from anywhere in the application including from the Schedulers list view.

Actions Menu

The Actions menu on the top left of each scheduler'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.

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

| Menu Item	Description
[Edit](#)	Edit this scheduler
[Copy](#)	Duplicate this scheduler
[Delete](#)	Delete this scheduler

Favorite Designation

Users have the option to mark scheduler 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 Schedulers module tab. In the Schedulers detail view, the star on the right of the scheduler's name is yellow once marked to indicate a favorite scheduler. For more information on how to mark records as favorites, please refer to the [Favoriting Schedulers](#) section of this documentation.

Next or Previous Record

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

Job Log

Beneath a schedule record's fields is a subpanel containing the logs of when the scheduler has run. Each record will contain a Job Status field indicating the outcome of the job and an Execute Time field to show when the job started.

Editing Schedulers

Schedulers may be edited at any time to update or add information to the record. You can make changes to existing scheduler records via the Schedulers edit view and quick-create forms. Edit view is available within the Schedulers module and includes all of the Scheduler fields you should need.

Quick Create is available for editing schedulers from outside the Schedulers 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.

For more information on setting the advanced options for the interval, please refer to the Advanced Options section.

Editing via Detail View

You can edit schedulers 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.

Prune Database on 1st of Month ⭐

Edit ▼

Job Name:	Prune Database on 1st of Month
Date & Time Start:	01/01/2005 02:30pm
Date & Time End:	12/31/2020 06:59pm

Editing via List View

You can edit schedulers via the list view by clicking the Pencil icon to the left of each scheduler's name. A pop-up window will open with the quick create form which is a shortened version of the edit view layout. Update the necessary fields, then click "Save" to preserve your changes.

Scheduler ⇕	Interval
☐ ☆ ✐ **Run Full-text Index**	As often as possible.

Deleting Schedulers

If a scheduler record is invalid and should no longer appear in your organization's Sugar instance, it may be deleted from either the Schedulers 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.

Note: If you wish to disable a scheduler but do not want to delete it, you can set the status to Inactive and it will not run.

Deleting via Detail View

Use the following steps to delete a scheduler record via the detail view:

1. Navigate to a scheduler record's detail view.
2. Select "Delete" from the Actions menu.
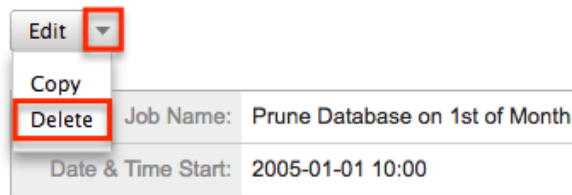
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting via List View

Use the following steps to delete one or more scheduler records via the list view:

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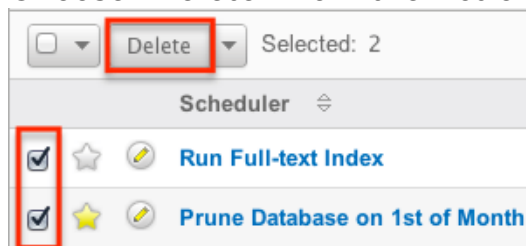
5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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

Exporting Schedulers

Sugar's Export option allows users to download all fields for the selected schedulers to their computers as a CSV (comma-separated values) file. This may be useful when needing to use Scheduler 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 scheduler records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

Schedulers may be exported from the Schedulers list view by selecting "Export" from the Actions menu.
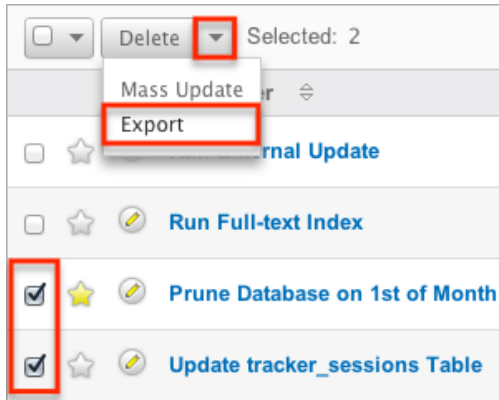
Mass Updating Schedulers

Mass updating allows users to make the same change to multiple scheduler records at once from the Schedulers list view. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. 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 scheduler records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.
Use the following steps to mass update scheduler records from the list view:

1. Navigate to the Schedulers list view by clicking the Schedulers module tab.
2. Use the list view's Search to find schedulers you wish to modify.
3. Select the desired schedulers individually or using the checkbox dropdown's options.
4. Choose "Mass Update" from the Actions menu.
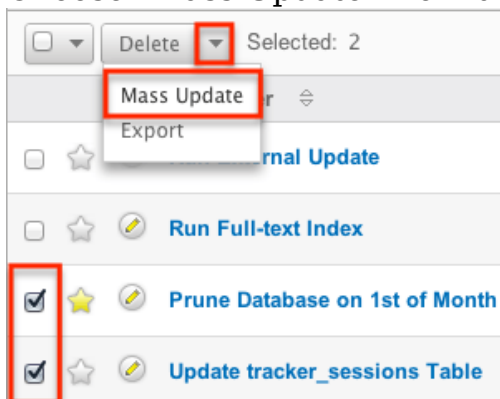
5. Scroll to the Mass Update panel and set values for the fields you wish to alter.

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

Favoriting Schedulers

Each Sugar administrator has the option to designate their own favorite schedulers that are important or will be viewed often. Once records are marked as favorites, you can select your most recent favorites directly from the Sugar Scheduler module tab.

Favoriting via List View

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

1. Navigate to the Schedulers list view by clicking the Schedulers module tab.
2. Use Search to find the scheduler records you wish to mark as favorites.
3. Click the star icon on the left of each desired scheduler's row.
4. To remove the scheduler 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 Schedulers detail view:

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

white.

Advanced Options

From the edit view of a scheduler, you can select the Advanced Options checkbox to refine the interval of the scheduler as well as configure the Advanced Options panel.

This opens up the crontab notation for the interval field. Crontab notation gives administrators more flexibility to define when and how often the scheduler runs. Crontab notation allows you to enter a value for each time part for the job to run on. You can specify complex values by using the following notations:

Character	Description
*	Asterisk is used to represent every value for the specified time part. For example, * in the mins field will run every minute.
/	Forward slash is used to represent increments. For example, */15 in the mins field will run every 15 minutes. 30/5 in the mins field will run starting at the 30th minute of the hour and every 5

	minutes after.
,	Comma is used to specify multiple values. For example, 18,20 in the hrs field will run at 6:00 PM and 8:00 PM.
-	Hyphen is used to specify a range of values. For example, 1-6 in the mo field will run from January through June.

Specify the values to run in the following interval fields using cron tab notation:

- **min** : Specify the minute of the hour to run on (0-59).
- **hrs** : Specify the hour of the day to run on (0-23).
- **date** : Specify the day of the month to run on (1-31).
- **mo** : Specify the month of the year to run on (1-12).
- **day** : Specify the day of the week to run on (0-6).

You may specify any combination of the fields to create the schedule needed to run the job.

Setting up Cron Scheduler

In order for the schedulers to run at the designated times, there needs to be a process running on the server to initiate the schedulers. This backend process will call the cron.php file in Sugar with some specific parameters, and the cron.php file will execute the schedulers as necessary.

Sugar instances hosted on Sugar's cloud service have the cron scheduler set up automatically, but it must be configured for on-site instances. In UNIX systems (MAC and Linux) you can configure crontab to run the schedulers. Navigate to Admin > Scheduler to get the system information necessary to set up the crontab.

Note: The scheduler is throttled by default to prevent it from running more often than every 30 seconds. This value is configurable by setting the $sugar_config['cron']['min_cron_interval'] value in the config_override.php file.

Setting Up in Unix/Linux

Use the following steps to set up crontab to run the Sugar schedulers:

1. From a command prompt, execute the following command:

```
crontab -u apache -e
```

2. The text editor will launch as the user "apache". If your web server is running under a different user, please adjust the line accordingly.
3. Add the commands displayed on the Admin > Schedulers page of your Sugar application into the crontab file:

```
* * * * * cd /var/www/sugar123; php -f cron.php > /dev/null 2>&1
```

Note: Make sure that the path to the root directory of Sugar and to PHP is correct.
4. Save the changes to the file. This will run the cron job every minute.

You can check crontab to see what commands are being run by executing the following command:

```
crontab -u apache -l
```

Last Modified: 2021-07-08 04:24:24

PDF Manager

Overview

The PDF Manager is used to create and manage templates for generated PDF files for any deployed module, custom or standard. Sugar comes with two PDF templates out of the box (Quote and Invoice).

Note: Legacy Quote PDF Templates (custom Quote templates created through code customizations) are not displayed in the PDF Manager but are still available in the Quotes module provided the templates were built off the TCPDF engine.

PDF Manager Fields

The PDF Manager 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
Author	The author name to be placed in the PDF properties
Description	A description or other information about the template
Footer Text	The text to be placed in the template's footer
Header Logo File	Click "Choose File" to upload a header image to the template **Note**: The image will display as 454 pixels wide by 45 pixels high; the uploaded image should be sized relative to these dimensions.
Header Text	The text to be placed in the template's header
Header Title	The title of the template header
Keyword(s)	The keywords to be placed in the PDF properties
Module	The module this template will work in **Note**: Once a template is created, the module cannot be changed.
Name	The name or designation of the template
Published	Determines if a template is available to users or not
Subject	The subject to be placed in the PDF properties
Teams	The Sugar team(s) assigned to the template record
Template	The content of the template
Title	The title to be placed in the PDF properties

PDF Manager Module Tab

The PDF Manager module tab can be accessed by navigating to the Administration page and clicking "PDF Manager" in the System section. Once in the PDF Manager list view, you can click the triangle in the PDF Manager 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 templates you last viewed in the module. Please note that clicking the module tab allows you to access the PDF Manager list view.
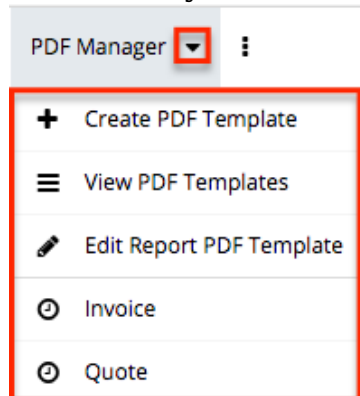
The Actions menu allows you to perform the following operations:

Menu Item	Description
[Create PDF Template](#)	Opens the edit view layout to create a new template
[View PDF Templates](#)	Opens the list view layout to search and display templates
[Edit Report PDF Template](#)	Opens the edit view layout to modify the report template

Creating PDF Templates

There are various methods for creating PDF templates in Sugar including via the PDF Manager module and duplication. The full edit view layout opens when creating the template directly from the PDF Manager menu and includes all of the relevant fields for your organization's templates.

Note: It is generally recommended to create a new template via duplication and then modify the copy to suit your needs.

Creating Via PDF Manager Module

You can create a new template via the Create PDF Templates option in the PDF Manager module tab. This opens up the edit view layout which allows you to enter all the relevant information for the template.
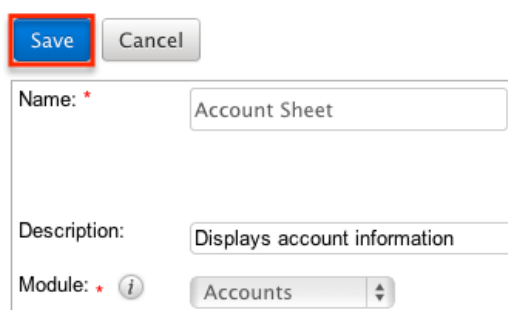
Use the following steps to create a template via the PDF Manager module:

1. Navigate to Admin > PDF Manager.
2. Click the triangle in the PDF Manager module tab and select "Create PDF Template".

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

Creating Via Duplication

You can also create a new template by duplicating an existing template record. The Copy option is useful if the template you are creating has a similar layout to an existing template.

Use the following steps to create a template by duplicating an existing record:
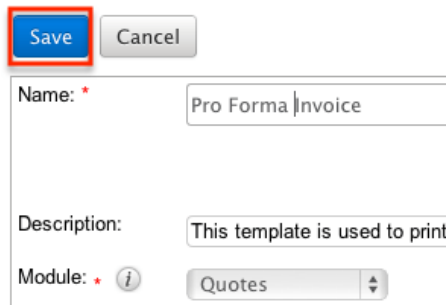
1. Navigate to a template record's detail view.
2. Click "Copy" from the Actions menu.
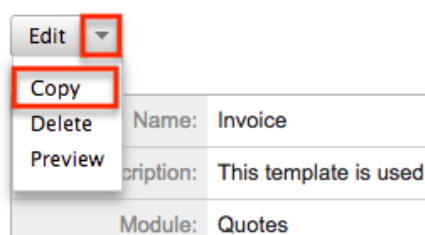
3. The displayed edit view is pre-populated with the original template's values. Update the necessary [fields](#), then click "Save".
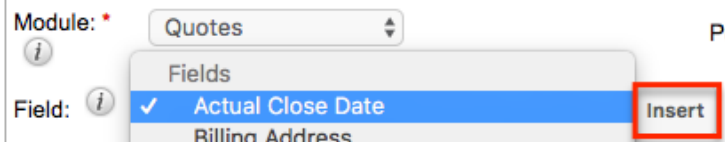
Note: If you change the module field during duplication, you will have to remove all variable references to the old module in the layout before saving.

Creating Content

The PDF template can contain images and HTML formatting as well as variable fields from the assigned module. TincyMCE is the rich text editor for formatting your template using HTML. For more information on using TinyMCE, please refer to the [TinyMCE](#) section in the User Interface in the Application guide.

To add variable fields from the assigned module, simply select the desired field from the Field dropdown and then click "Insert".

The variable will be placed wherever your computer's cursor is located in the template and can be moved around as necessary.

Note: The Link section provides all one-to-one and one-to-many relationships to provide linked data in the template.
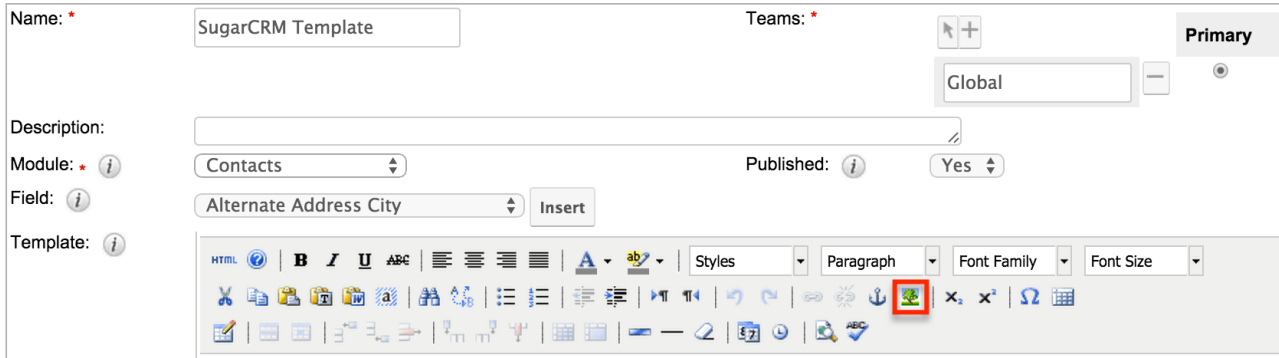
For modules that have a subset of data in the template (e.g. Product line items in Quotes), there are special containers in the template that indicate where the repeating areas start and stop. These containers are designated by the following commands:

- **Start** : {foreach from=$product_bundles item="bundle"}
- **End** : {/foreach}

Note: These lines are important and if removed can cause errors when generating a PDF. If you encounter an error when generating a PDF, we recommend checking

the template for these start and end placeholders.

To add images to a PDF template, simply select the image icon in the toolbar. Fill out the image details (Image URL, Alignment, Dimensions, Border, etc.) in the Insert/Edit Image dialog then click "Insert".

Note: Images cannot be copied and pasted or dragged and dropped into a PDF template. The image icon must be used to insert an image.

Viewing PDF Templates

There are various options available for viewing template records in Sugar including via PDF Manager list view, PDF Manager detail view, and PDF Manager Recently Viewed menu.

Viewing Via List View

The PDF Manager list view displays all template records meeting the current search criteria. To access the list view, simply click the PDF Manager module tab. While list view shows key template fields, you can click the template's name to open the record in detail view. For more information on viewing templates via list view, please refer to the [PDF Manager List View](#) section.

Viewing Via Detail View

The PDF Manager detail view displays thorough template information including all template fields. The detail view can be reached by clicking a template record's link from anywhere in the application including from the PDF Manager list view. For more information on viewing templates via detail view, please refer to the [PDF Manager Detail View](#) section.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which templates you have recently viewed. Click the triangle in the [PDF Manager module tab](#) to see a list of the 3 templates you most recently viewed. Click the template's name from the list to open it in detail view.
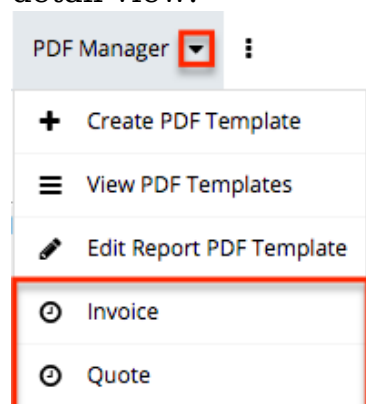
Searching PDF Templates
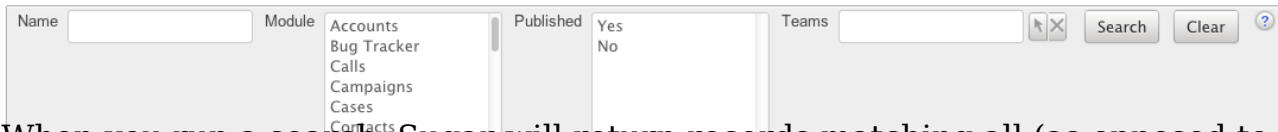
The PDF Manager list view includes a Basic Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the PDF Manager list view below. Please note that Sugar automatically appends the wildcard character (%) 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 offers a few, commonly used fields for a simplified search experience. 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.

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 a module and enter a template name, Sugar will only return template records with a matching name that are assigned to that module. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all template records, simply click "Clear" and then "Search" to perform a blank search with no filters.
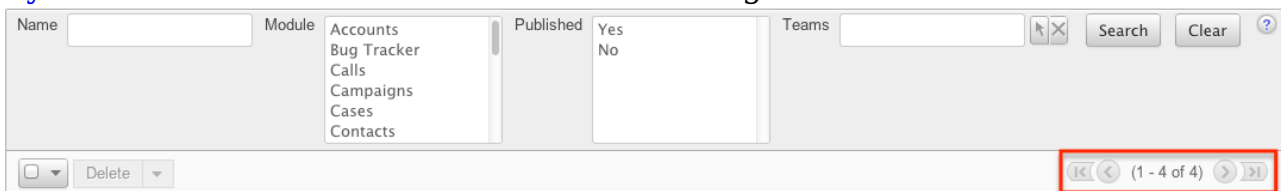
PDF Manager List View

The PDF Manager list view displays all template records meeting the current search criteria. You can view the basic details of each template within the field columns.

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 template records directly from the list view by

first selecting the desired records. To select individual template records on the PDF Manager list view, mark the checkbox on the left of each row. To select or deselect multiple template 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 PDF template results.
- **Select All** : Selects all records in the current search results across all pages of PDF template results.
- **Deselect All** : Deselects all records that are currently selected.
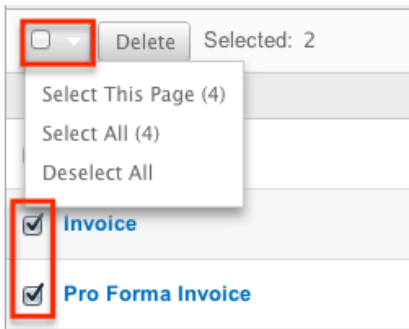
Actions Menu

The Actions menu to the right of the checkbox dropdown typically allows you to perform various actions on the currently selected records.
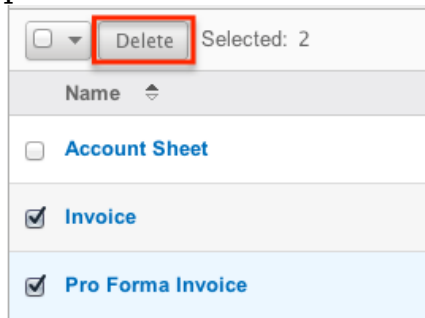
The only action available from the PDF Manager list view is the following operation:

Menu Item	Description
Delete	Delete one or more templates at a time

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.

PDF Manager Detail View

The PDF Manager detail view displays thorough template information including all template fields which are grouped by default into the Overview and PDF Document Properties panels. The detail view can be reached by clicking a template record's link from anywhere in the application including from the PDF Manager list view.

Actions Menu

The Actions menu on the top left of each template's detail view allows you to perform various actions on the current record. Administrator users can change the action items to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration guide.

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

Menu Item	Description
Edit	Edit this template
Copy	Duplicate this template
Delete	Delete this template
Preview	Preview this template

Next or Previous Record

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

Editing PDF Templates

Templates may be edited at any time to update or add information to the record. You can make changes to existing template records via the PDF Manager edit view. Edit view is available within the PDF Manager module and includes all of the template fields you should need.

Editing Via Detail View

You can edit templates 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.

Pro Forma Invoice

Editing Report PDF Template

The Report PDF Template is used when generating a report as a PDF. The report template may be edited at any time to include your company's logo. This logo displays in the header for all Report PDF files. The image will display as 454 pixels wide by 45 pixels high; the uploaded image should be sized relative to these dimensions.

You can edit the report template via the [detail view](#) by selecting the Edit Report PDF Template option from the PDF Manager module tab.
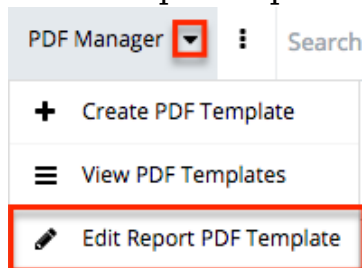
Once the edit view layout opens, update the necessary fields, then click "Save" to preserve your changes.

Deleting PDF Templates

If a template record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the PDF Manager 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 Via Detail View

Use the following steps to delete a template record via the detail view:

1. Navigate to a template record's detail view.
2. Select "Delete" from the Actions menu.
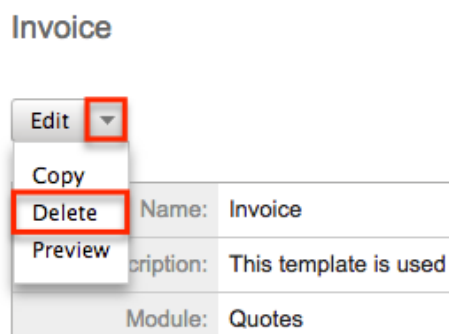
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting Via List View

Use the following steps to delete one or more template records via the list view:

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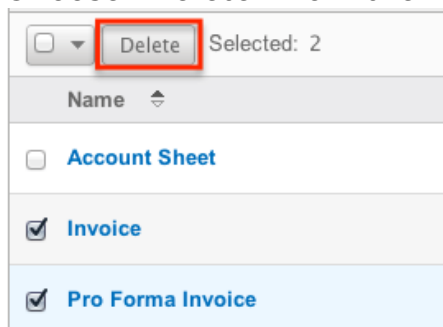
5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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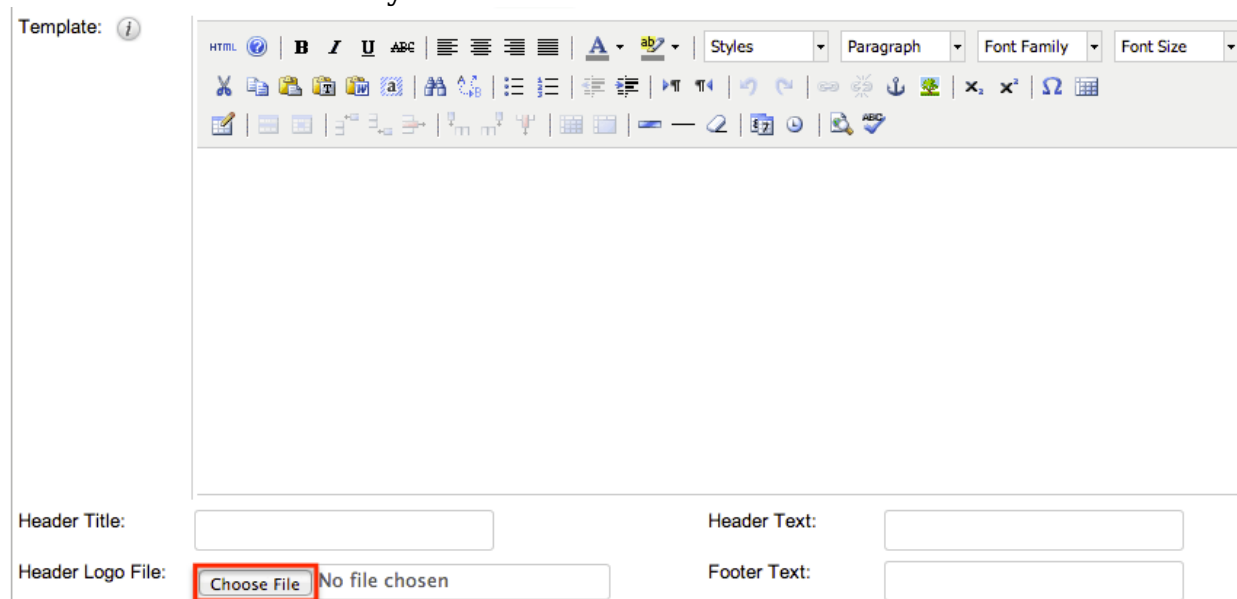
Adding a Header Image to PDF Template

Image files can easily be uploaded from your local machine to be used as a header image on a PDF template. After uploading and saving the image to the template's Header Logo File field, it will be shown on the PDF generated by users in Sugar.

Header images will display as 454 pixels wide by 45 pixels high, so the uploaded image should be sized relative to these dimensions (e.g. 908x90 or 1816x80).

After saving an appropriately sized image file to your computer, use the following steps to add the header image to the PDF template:

1. Create a new PDF template or open up an existing template via Admin > PDF Manager.
2. Click the "Choose File" button in the Header Logo File field to open a file selection window from your browser.

3. Select the image file from your local machine then click "Open" to add the image.

Please note that you must save then preview the PDF template in order to view the inserted header image.

Previewing PDF Templates

Previewing PDF templates allows you to see what the template will look like before publishing it in Sugar. The preview option displays the PDF template with the database field names and not actual data values and is accessible from the detail view.

Use the following steps to preview a template via the detail view:

1. Navigate to a template record's detail view.
2. Select "Preview" from the Actions menu.
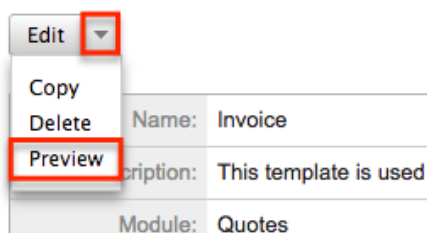
3. The PDF will download to your computer for viewing.

Last Modified: 2020-11-30 17:17:29

Web Logic Hooks

Overview

Web logic hooks allow you to establish events on a per module basis for Sugar to send data from the record in focus to an external URL so that additional processing can be completed outside the Sugar application. When a Web Logic Hook is triggered, the data is not sent instantaneously. Rather, the data is queued and processed under the Dispatch Web Logic Hook scheduled job. Once the job is processed through a regular scheduler run, the data for the record that triggered the hook is transmitted to the designated URL in a JSON format for further processing.This can allow you to send this data to other applications within your organization or to manipulate the data and transmit it back to Sugar via the REST API.

Web Logic Hook Fields

The Web Logic Hooks module contains a number of stock fields which come out-of-the-box with Sugar. For information on using and and editing various field types, refer to the [User Interface](#) documentation. The below definitions are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

Field	Description
Module Name	The module that the web logic hook will trigger off when the trigger event occurs in that module
Name	The name of the web logic hook
Request Method	The HTTP request method that the web logic will utilize to call out to the specified URL
Trigger Event	The event that must occur in order for the web logic hook to process
URL	The URL that will receive the data transmitted by the web logic hook **Note**:This URL should be a URL outside of your SugarCRM instance. If you have an instance on Sugar's cloud service, it is your responsibility to host the URL that will process the web logic hook.

Working With Sugar Modules

While the Web Logic Hooks module has some features that only apply to web logic hooks, it also uses the Sidecar user interface that most Sugar modules are based on. The following sections detail menus, views, and actions common to sidecar modules and contain links to additional information within the page or links to the User Interface documentation.

Web Logic Hooks Menus

The Web Logic Hooks 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 Web Logic Hooks module tab is typically located on the navigation bar at the top of any Sugar screen after selecting "Web Logic Hooks" from the admin screen. Click the tab to access the Web Logic Hooks list view. You may also click the triangle in the Web Logic Hooks tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important operations within the module. The Recently Viewed menu displays the list of web logic hooks you most recently viewed.
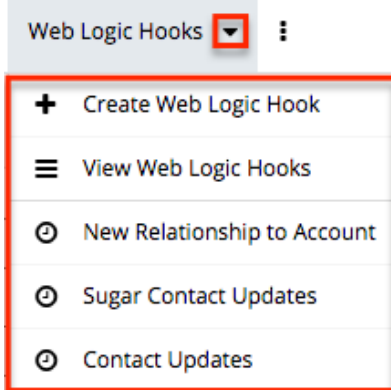
The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Web Logic Hook	Opens the record view layout to create a new web logic hook
View Web Logic Hooks	Opens the list view layout to search and display web logic hooks

List View Menus

The Web Logic Hooks list view displays all web logic hook records and allows for searching and filtering to locate specific web logic hooks. You can view the basic details of each record within the field columns of the list view or click a web logic hook'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 web logic hook records or

click the checkbox in the list header to select all records displayed on the current set of list view results.
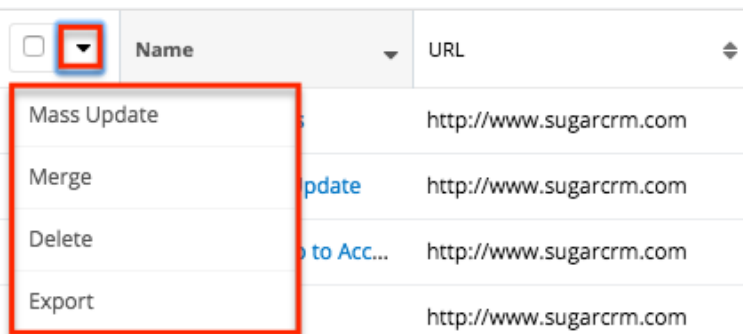
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more web logic hooks at a time
Merge	Merge two or more duplicate web logic hooks
Delete	Delete one or more web logic hooks at a time
Export	Export one or more web logic hooks 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 web logic hook directly from the list view.
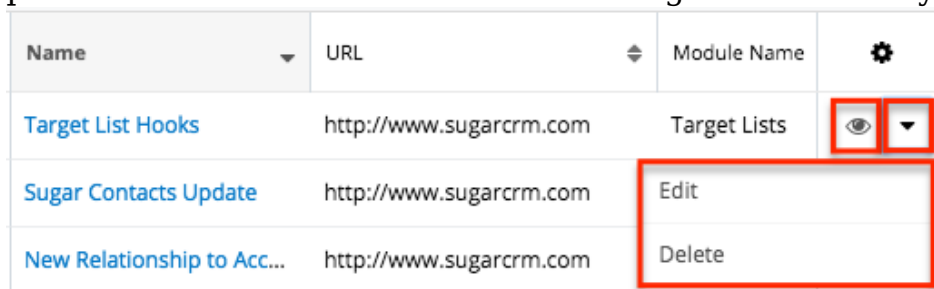
The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description

Preview (Eye icon)	Preview this web logic hook in the intelligence pane
Edit	Edit this web logic hook
Delete	Delete this web logic hook

Record View Actions Menu

The Web Logic Hooks record view displays a single web logic hook in full detail including its fields. To access a web logic hook's record view, simply click a hyperlinked web logic hook name from the Web Logic Hooks list view. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.
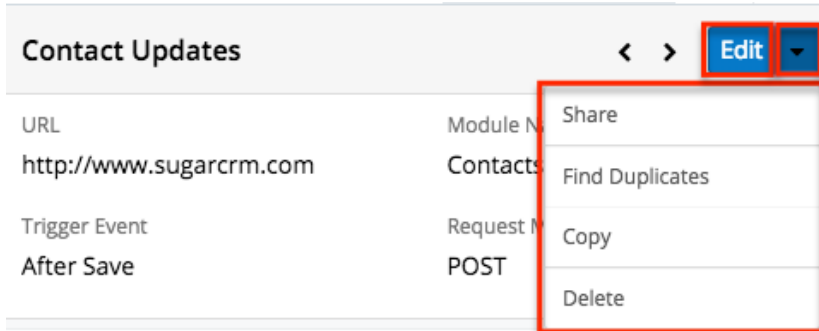
The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this web logic hook
Share	Share a link to this web logic hook via email
Find Duplicates	Locate potential duplicates of this web logic hook
Copy	Duplicate this web logic hook to create a new web logic hook
Delete	Delete this web logic hook

Common Views and Actions

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

links to sections of the current page that cover topics specific to web logic hooks.

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

Last Modified: 2021-01-29 14:21:01

Data Archiver

Overview

The Data Archiver in Sugar lets an administrator archive or delete Sugar records from their database either on demand by manually triggering a job or at regular intervals via the Run Active Data Archives/Deletions scheduler. While archiving records simply moves the data to a hidden table, deleting records via Data Archiver frees up space in your database by allowing administrators to selectively and permanently prune records.

In addition to the Data Archiver module, the Archive Runs module is displayed as a subpanel under the record view of any data archiver record. The Archive Runs subpanel displays a history of runs that have occurred for the parent data archiver record, giving the administrator a clear history of what has occurred in the system and access to the affected record IDs.

Data Archiver Fields

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

Field	Description
Active	The enabled or disabled state of the job for scheduled runs; only active records will be processed by the [Run Active Data Archives/Deletions](#) scheduler. An administrator will still be able to click on "Perform Now" to run the job manually even if the Active field is set to false.
Filter	The filter(s) that should be applied to the module records in order to identify the subset of records to archive or delete
Module	The module that contains records you want to archive or delete; all modules are available in the Data Archiver module list.
Name	A unique and descriptive name for the job
Process Type	Select whether you want to [archive or hard delete](#) the records identified by this job.

Note: Fields, layouts, and columns for the Data Archiver module and related Archive Runs module are not available for customization in Studio.

Archive vs Hard Delete

Jobs created in the Data Archiver module can have one of two process types: Archive or Hard Delete.

An archive process type will remove specified records from the active table of the chosen module and transfer them to a newly created archive table. The archive table is a clone of the active table. Because archiving simply moves records from one part of your database to another, it does not free up any room in your database, but it does remove old or non-essential data from the view of users. Once archived, the data can no longer be accessed via the Sugar user interface. SugarCloud customers can access their archived data by making and downloading a database backup to access their archive tables.

A hard-delete process type will permanently remove specified records from the active table of the chosen module, freeing space on your database. This gives administrators the ability to selectively prune their databases and not just mark entries as deleted as the standard "soft delete" does when users delete records via the application's interface. As an added benefit, you can filter jobs in the Data Archiver on the "Deleted" database field, which is hidden from standard filters in Sugar, letting you manually prune user-deleted records as needed if you prefer not to enable the automated Prune Database on 1st of Month scheduler. Hard deleting is not reversible, so this information can never be retrieved again. For that reason, we recommend performing regular backups and storing them locally before performing hard-delete actions.

Creating and Running a Data Archiver Job

Data Archiver jobs will run automatically on regularly set intervals when the Run Active Data Archives/Deletions scheduler is active. Whether the scheduler is active or not, an administrator may also run Data Archiver jobs manually as needed by clicking the "Perform Now" button on a data archiver record.

Use the following steps to clean up your database by creating an archive or hard-delete job in the Data Archiver module:
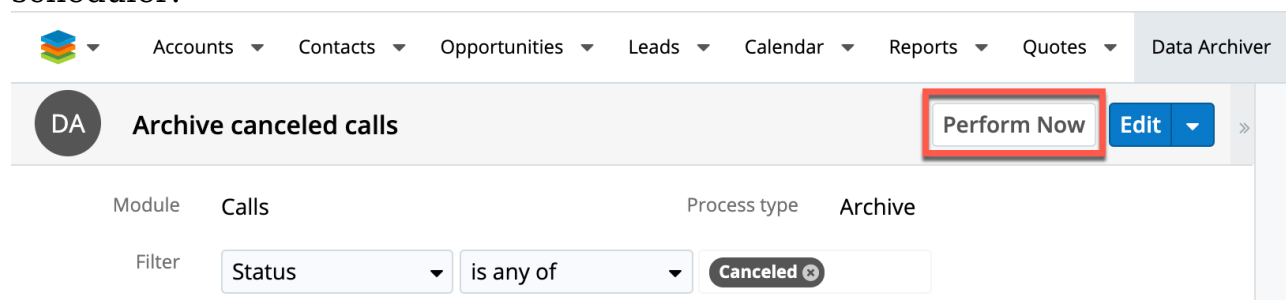
1. Navigate to Admin > Archive Records.
2. Click "Create" to define a new set of records to archive or delete.
3. Complete the form fields, using the field descriptions above as guidance. Use the Add button at the end of the filter row to create additional filter criteria if needed.

4. Click "Save".
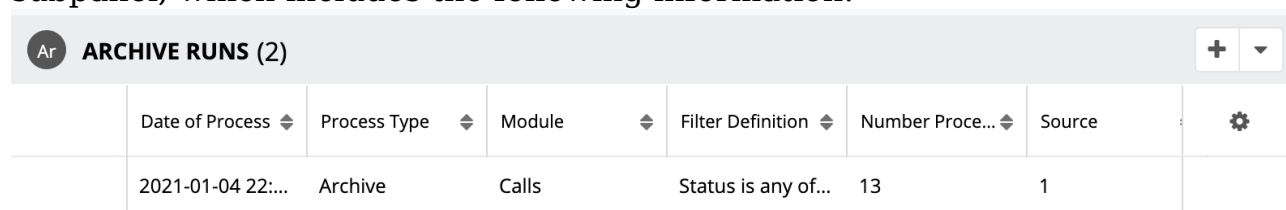
After saving an active Data Archiver record, the archive or deletion will

automatically process the next time the [Run Active Data Archives/Deletions](#) scheduler runs. Alternatively, you may click on "Perform Now" in the data archiver job's record view to run the job immediately without activating or waiting for the scheduler.

Each time a Data Archiver record runs, a new entry will appear in its Archive Runs subpanel, which includes the following information:

- **Date of Process**: The date and time that the Data Archiver job ran
- **Process Type**: Whether the job archived or hard-deleted records
- **Module**: The module which contained the processed records
- **Filter Definition**: The filters that were applied to identify the processed records
- **Number Processed**: The number of records that were identified and processed by the job
- **Source**: The ID of the user who initiated the run

Retrieving Archived Records and Deleted Record IDs

When you hard-delete data via the Data Archiver, Sugar will preserve the IDs (and only the IDs) of the records that are deleted in a database table called archive_runs. All other data related to the hard-deleted records will be gone and not recoverable from any means other than a local backup. Therefore, we recommend backing up your database before performing hard-delete actions. Customers with access to their database can retrieve the list of IDs that were hard deleted in the row of the archive_runs table that is associated with the job that ran from the parent data_archivers record. SugarCloud customers can make and download a [database backup](#) to access the archive_runs table or create a report in the Advanced Reports module if they are using Sugar Sell, Serve, Ultimate, or Enterprise. Once you have the deleted IDs, you may be able to restore hard-

deleted records by comparing the IDs with your backup.

Records that are archived via the Data Archiver are stored in the database in a table cloned from the originating module table. The clone will have _archive appended to the end of its table name (e.g., accounts_archive). Customers with access to their database can find their archived data in these archive tables. SugarCloud customers can make and download a [database backup](#) to access their archive tables or create an Advanced Report if they are using Sugar Sell, Serve, Ultimate, or Enterprise.

Last Modified: 2021-01-08 01:11:31

Email Administration

Overview

Sugar comes with many different email-related capabilities, many of which require an administrator to set up or configure. Email administration covers the system email settings, campaign email settings, email archiving, inbound email, and managing the email queue.

Email Accounts

Outgoing Email Accounts

There are three types of outgoing email accounts used in Sugar:

- [System Email Account](#): The administrator sets up the system email account by configuring the System Email Settings. Sugar uses this account to send campaigns and email notifications such as password reset emails, record assignment notifications, and workflow alerts.
- **Default User Email Account** : A default email account is automatically created by Sugar for each user in Sugar. The default user account will use the primary email address stored in the user's profile. To use their default email accounts for sending email through Sugar, users must edit their profile and select "Sugar Email Client" as their outgoing email client. For more information on how users configure their user accounts, refer to the [Emails](#) documentation in the Application Guide.
  Note: The users' default email accounts may be affected by the "Allow users to use this account for outgoing email" option in Admin > [System](#)

Email Settings. If the administrator has enabled the option, users will not be able to configure their default email account and must instead utilize the system email account or create a new user email account. 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.

- **User Email Accounts** : User email accounts can be created by all users and can consist of the user's personal email accounts (e.g. jane@example.com) as well as any shared email accounts. Shared email accounts allow a group of users to send outbound email messages using the same email account (e.g. support@example.com). If you have existing group email accounts that should be available to select when composing emails, it is recommended that you create a shared email account via Emails > Email Settings, making sure that it is assigned to the specific team(s) who can use the account to send emails. For more information on creating outgoing email accounts, refer to the [Emails](#) documentation in the Application Guide.
  Note: The "[Allow users to configure email accounts](#)" option must be enabled in order for users to see the Create button to create new outgoing email accounts when they navigate to Emails > Email Settings.

Incoming Email Accounts

There are two types of incoming email accounts used in Sugar:

- [Group Mail Accounts](#): Group inbound email accounts allow multiple users, such as team members, to view emails from an external mail account. When emails are addressed to your organization but not to any particular user, you can route it to a Group mail account such as support@example.com or sales@example.com. Users can subsequently distribute emails in the Group mail account to other team members. Emails received to a Group mail account will have no assigned user unless "[Create Case from Email](#)" has been enabled for the account.
  Note: Group Mail Accounts will only import unread messages from the mail server.
- [Bounce Handling Mail Accounts](#) : Bounce handling email accounts are configured to store campaign emails that are returned to the server, or "bounced" back to you due to incorrect email addresses or incompatible server settings on the receiving end. You can create a bounce handling inbox separately for each campaign, or you can create one that is common to all campaigns. The system tags every bounced campaign email with a unique identifier that enables you to identify the campaign.

System Email Settings

The System Email Settings section allows Sugar administrators to configure the system's outbound email settings as well as additional email and security options. Make any necessary changes in the sections below and click "Save" to commit the changes.

Email Settings

Outgoing Mail Configuration

This section applies to the system email settings. For help setting up the email accounts for individual users, please refer to the Emails documentation in the Application Guide.

The Outgoing Mail Configuration section contains details for sending email notifications, scheduled reports, workflow alerts, etc. Enter appropriate values for the following fields, keeping in mind that all required fields are marked with a red asterisk and must be completed prior to saving:

- **"From" Name** : The name the outgoing email will come from; for example, the name of your organization. Defaults to "SugarCRM".
- **"From" Address** : The email address the outgoing email will come from. Defaults to "do_not_reply@example.com".

  - If specifying a different address than the email address associated with the account you are authenticating, the email server being utilized may need to be configured to allow the email account to

send email as the entered From Address.

- ○ For more information on configuring "Send As" permissions with Gmail, refer to [Gmail's Help documentation](#).
- ○ For Exchange Online, enter only the authorized email address, as it cannot send emails using a different email address unless the organization's Exchange admin has configured the account to allow this.
- **Choose your Email provider** : Click on the tile that corresponds with your mail provider (e.g. Google, Exchange Online) to populate provider-specific values. Refer to the table below this list for details about the fields shown for each provider.
- **Allow users to use this account for outgoing email** : Check this box if you would like users to be able to send emails using the same outbound mail account. If the option is not selected, users will still be able to use the outbound mail server to send emails by entering their personal mail account information in their user preferences. For more information on setting up the email settings in user preferences, please refer to the [Email Settings](#) section of the Getting Started documentation.

Once the appropriate mail server information is entered, you can send a test email to make sure it is configured properly. Click "Send Test Email", enter your email address, and send the test. If you do not receive the test email, re-enter the account information including the password to ensure it is all correct.

Email Provider	Fields	Description
Google	Authorize	Click this button to authorize the Google mail account to be the system email account. The Google connector must be [configured](#) via Admin > Connectors before you can authorize and set up the mail account. **Note**: A "This app isn't verified" warning may appear after selecting your Gmail account to authorize. You can click the Advanced link then click the "Go to..." link at the bottom of the window to proceed and grant permission for the

		connection to occur. For more information on this warning, refer to the [Unverified apps](#) article on the Google Cloud Platform Console Help page.
	Status	The status will display "Authorized" once the mail acount is authorized.
	Authorized Email Address	The email address of the authorized Google mail account.
	SMTP Mail Server	The web address of the external email server Sugar will connect to.
	SMTP Port	The communication port number used for connecting to the mail server.
	Use SMTP Authentication	This option is automatically enabled to require server authentication for the account. Most email servers require authentication for security purposes. By default, authentication is required for Google.
	Enable SMTP over SSL or TLS	Select the appropriate option from the dropdown to use Secure Socket Layer, Transport Layer Security, or no encryption when connecting to the mail server.
Exchange Online	Authorize	Click this button to authorize the Microsoft Exchange mail account to be the system email account. The Microsoft connector must be [configured](#) via Admin >

		Connectors before you can authorize and set up the mail account.
	Status	The status will display "Authorized" once the mail account is authorized.
	Authorized Email Address	The email address of the authorized Microsoft Exchange mail account.
	Exchange Server	The web address of the external email server Sugar will connect to.
	Exchange Server Port	The communication port number used for connecting to the mail server.
	Use SMTP Authentication	This option is automatically enabled to require server authentication for the account. Most email servers require authentication for security purposes. By default, authentication is required for Exchange.
	Enable SMTP over SSL or TLS	Select the appropriate option from the dropdown to use Secure Socket Layer, Transport Layer Security, or no encryption when connecting to the mail server.
Yahoo! Mail	Yahoo! Mail ID	Enter the email address or user name to connect to the SMTP server.
	Yahoo! Mail Password	Enter the password associated with the entered email address or user name.
Exchange Basic Authentication	Exchange Server	The web address of the external email server

		Sugar will connect to.
	Exchange Server Port	The communication port number used for connecting to the mail server.
	Use SMTP Authentication	Check this box to require server authentication for the account. Most email servers require authentication for security purposes. By default, authentication is required for Exchange. If left unchecked, the SMTP server must accept anonymous connections, which is not recommended.
	Enable SMTP over SSL or TLS	Select the appropriate option from the dropdown to use Secure Socket Layer, Transport Layer Security, or no encryption when connecting to the mail server.
	Exchange Username	Enter the user name to connect to the SMTP server.
	Exchange Password	Enter the password associated with the entered user name.
Google Basic Authentication	SMTP Mail Server	The web address of the external email server Sugar will connect to.
	SMTP Port	The communication port number used for connecting to the mail server.
	Use SMTP Authentication	Check this box to require server authentication for the account. Most email servers require authentication for security

			purposes. By default, authentication is required for Google. If left unchecked, the SMTP server must accept anonymous connections, which is not recommended.
		Enable SMTP over SSL or TLS	Select the appropriate option from the dropdown to use Secure Socket Layer, Transport Layer Security, or no encryption when connecting to the mail server.
		Gmail Email Address	Enter the email address to connect to the SMTP server.
		Gmail Password	Enter the password associated with the entered email address.
Other		SMTP Mail Server	The web address of the external email server Sugar will connect to.
		SMTP Port	The communication port number used for connecting to the mail server.
		Use SMTP Authentication	Check this box to require server authentication for the account. Most email servers require authentication for security purposes. By default, authentication is required for email providers such as Outlook. If left unchecked, the SMTP server must accept anonymous connections, which is not recommended.
		Enable SMTP over SSL or	Select the appropriate

	TLS	option from the dropdown to use Secure Socket Layer, Transport Layer Security, or no encryption when connecting to the mail server.
	Username	Enter the user name to connect to the SMTP server.
	Password	Enter the password associated with the entered user name.

Email Options

The Email Options section provides some global options for email configuration. Check the box next to the desired options:

Note: Logged in users must log out and back in for changes to the following settings to take effect.

- **Assignment Notifications** : When enabled (default), Sugar will send email notifications to users automatically when records are assigned to them. When assigning a record to yourself, you will not receive a notification of the assignment.
  Note: To receive notifications, users must also have "Notify on Assignment" checked in their user profile.
- **Send notification from assigning user's e-mail address** : Enable this option to have Sugar send notifications from the email address and name of the user who is assigning a record to another user. This option is disabled by default.
  Note: The SMTP server being used must allow sending from a different email address than the authenticated account and the email account may need to be configured to allow the Send As permission. For more information, please refer to the following articles:
    - [Configuring "Send As" Permissions With Exchange](#)
    - [Configuring "Send As" Permissions With Office 365](#)
    - [Configuring "Send As" Permissions With Gmail](#)
- **Allow users to configure email accounts** : Determines whether users can create new outgoing email accounts. When enabled (default), users will see a Create button when they navigate to Emails > Email Settings.
- **Opt-out new email addresses by default** : Enable this option to mark new email addresses added to Sugar records as opted-out by default. Email
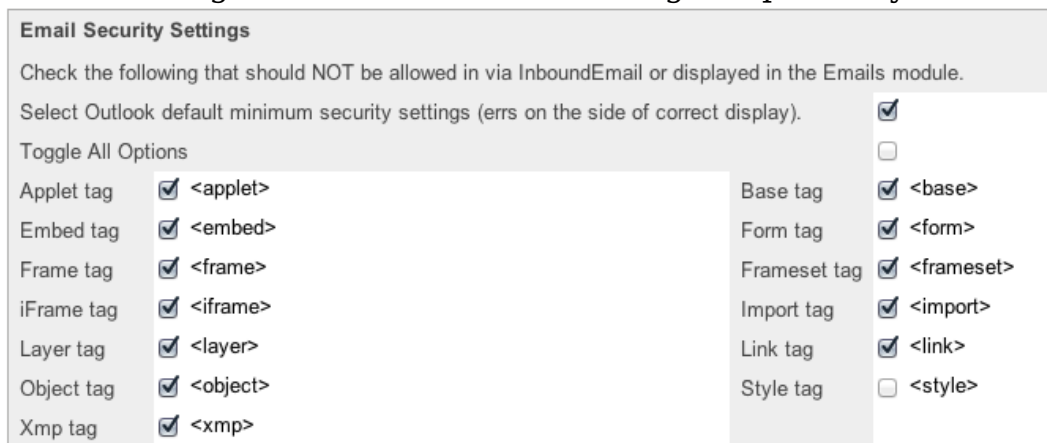
addresses that are marked as opted out cannot receive campaign emails from Sugar. Please note that changing this setting will not affect email addresses already existing in Sugar. For more information on opted-out email addresses, please refer to the [Emails](#) documentation in the Application Guide.

Email Security Settings

The Email Security Settings section allows Sugar administrators to decide which HTML tags are allowed to be displayed in Sugar. The selected tags will not be allowed for viewing within Sugar. There are two options to mass set the tag selection:

- **Select Outlook default minimum security settings** : Select this option to automatically select every tag that Outlook also restricts. This will not strip the style tag which is used by default in Outlook. This option is selected by default.
- **Toggle All Options** : Select this option to either select all tags or deselect all tags.

After selecting one of those options you can individually select or deselect additional tags to restrict or allow the tags respectively.

Email Security Settings			
Check the following that should NOT be allowed in via InboundEmail or displayed in the Emails module.			
Select Outlook default minimum security settings (errs on the side of correct display).			☑
Toggle All Options			☐
Applet tag	☑ \<applet>	Base tag	☑ \<base>
Embed tag	☑ \<embed>	Form tag	☑ \<form>
Frame tag	☑ \<frame>	Frameset tag	☑ \<frameset>
iFrame tag	☑ \<iframe>	Import tag	☑ \<import>
Layer tag	☑ \<layer>	Link tag	☑ \<link>
Object tag	☑ \<object>	Style tag	☐ \<style>
Xmp tag	☑ \<xmp>		

Related Contacts Emails

The Related Contacts Emails section allows administrators to enable or disable related contact's emails from appearing in the Emails subpanel and History dashlet for certain modules (Cases, Accounts, Opportunities). In order to have emails from related contacts appear in the Emails subpanel, simply mark the checkbox to the right of the module name (e.g. Opportunities). To disable related contact's emails from appearing in the Emails subpanel, uncheck the box for the specific module as

necessary. Click "Save" to preserve the change.

Campaign Email Settings

The Campaign Email Settings section allows Sugar administrators to configure some backend settings for sending campaign emails. Select the appropriate values for the following fields:

- **Number of emails sent per batch** : When the "Run Nightly Mass Email Campaigns" scheduler runs, it will send out the specified number of emails for a single run. The default is set to 500. Some email servers have one or more of the following restrictions for a specific timeframe (e.g. hour, day, etc.): the number of unique recipients, how many times the same email can be sent to individual recipients, and the most common, how many emails can be delivered. This setting helps control the outgoing email to conform to these restrictions. For example, if your scheduler is set to run every hour, the number of emails to send per batch is set to 500, and you have 1600 emails to send out, starting at 2:00 AM the last batch of emails will be sent at 5:00 AM. Please check with your email provider to determine the proper level.
- **Location of campaign tracking files** : Campaign tracking files log responses from campaign targets. If you are running Sugar on an external network, select "Default" to accept the default location. However, if your Sugar instance is behind a firewall, then choose "User Defined" and specify the path to your external web server in the field below. The external web server must have the ability to connect to your Sugar instance behind the firewall. Ensure that you create a file named index.php to handle requests for three different types of entry points: campaign_trackerv2, removeme, and image, and place the index.php file in the path to your external web server. This index.php file must make the appropriate calls to the index.php file located in the root of your Sugar instance in order to properly record the activities in Sugar. For more information on how to setup a custom campaign tracker page, please refer to the [Using a Custom Page For Campaign Trackers](#) section of the Advanced Config Options documentation in the Administration guide.
- **Keep copies of campaign messages** : Set this option to "Yes" to keep a copy of every email sent during a campaign. If "No" is selected, the template is saved and one copy of the email is stored in the Emails module. The email record will have an empty To field but the recipients will be

visible in the email's related records subpanels. The default is set to "No".
Note: Storing every email sent does take up space in the database and can reduce performance. We recommend setting this value to "No".

Campaign Email Settings

Outbound Email Options

Number of emails sent per batch: *	500
Location of campaign tracking files (like campaign_tracker.php) *	● Default ○ User Defined
	Value of Config.php s(
Keep copies of campaign messages: * (i)	○ Yes ● No

Save   Cancel

Make any necessary changes and click "Save" to commit the changes.

Email Queue

The Email Queue option in Admin is where Sugar administrators can monitor and perform actions on queued email. When sending a campaign, the emails are not sent immediately but are instead queued to be sent. Each queued email has a "Send On" date and time set by the campaign they are sent from. The scheduler "Run Nightly Mass Email Campaigns" takes the queued emails that are ready to be sent based on this date and time and sends them in batches. If an email fails to send from the queue for any reason it will be flagged as a send attempt and, by default, Sugar will not attempt to send that email for another 24 hours. Once Sugar reaches six failed attempts to send an email it will be deleted from the queue. In order to send a failed email sooner than the default 24 hours, you can perform a [mass update](#) to reset the In Process field. For more troubleshooting information, refer to the [Troubleshooting Campaigns Failing to Send From Email Queue](#) article. This section will cover how to use the email queue as well as the various actions and options available from within the email queue.

Viewing via List View

The email queue list view displays all queued email records meeting the current search criteria. To access the list view, simply click the Email Queue link on the Admin page. List view shows key email fields including links to the Campaign, Recipient, and Marketing Message records. For more information on viewing queued email via list view, please refer to the [Email Queue List View](#) section.

Searching Queued Email

The email queue 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 Email Queue 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.

Email Queue

Once the search is complete, the relevant results will populate in the list view below the search panel. To see all queued email records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.

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.
- **Layout Options** : Use the expandable Layout Options section to configure your list view. For more information, please refer to the [Layout Options](#) section of the Search documentation.
- **Saved Searches** : Save, recall, update, and delete searches that you use often. For more information, please refer to the [Saved Search](#) section of the Search documentation.

Email Queue

Email Queue		
Campaign	Recipient Name	Recipient Email
My Items ☐		
≫ **Layout Options**	Save search as: [ ] Save	Modify current search: Update Delete
Search Clear **Basic Search** | **Saved Searches** –none–		
Send Queued Campaign Emails		

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 enter a campaign name to search and a recipient name, Sugar will only return queued email records with matching both fields. Once the search completes, the relevant results will populate in the list view below the search panel. To see all queued email records to which you have access, simply click "Clear" and then "Search" to perform a blank search with no filters.

Email Queue List View

The Email Queue list view displays all queued email records meeting the current search criteria and to which your user has access. You can view the basic details of each email within the field columns.

You have the option to change what fields are displayed in 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.

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 queued email records directly from the list view by first selecting the desired records. To select individual queued email records on the Email Queue list view, mark the checkbox on the left of each row. To select or deselect multiple queued email 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 results.
- **Select All** : Selects all records in the current search results across all pages of results.
- **Deselect All** : Deselects all records that are currently selected.
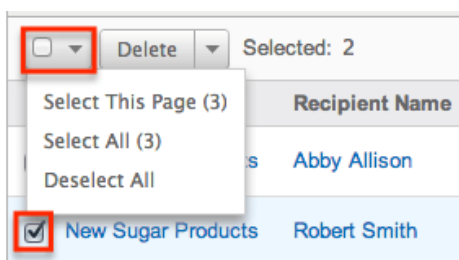
Actions Menu

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 queued emails at a time
Mass Update	Mass update one or more queued emails at a time

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.
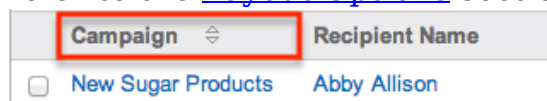
Deleting Queued Email

If a queued email is invalid or should no longer be sent, it may be deleted from the list view. The list view allows for mass deleting multiple records at once. Deleting queued emails will not delete the campaign or target, but will remove the instance of this email so it will not be sent.

Mass Deleting via List View

Use the following steps to delete one or more queued email records via the list view:

1. Navigate to the Email Queue list view by clicking the Email Queue link on the Admin page.

2. Use the [Basic](#) or [Advanced Search](#) to find the queued email records you wish to delete.
3. Select the desired records individually or using the [checkbox dropdown's](#) options.
4. Choose "Delete" from the Actions menu.
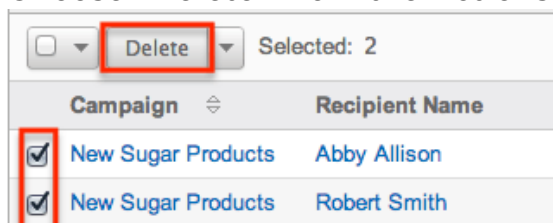
5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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

Mass Updating Queued Email

Mass Updating allows users to make the same change to multiple queued email records at once from the Email Queue list view. Currently, only fields with the data type of date, datetime, dropdown, multiselect, and radio may be altered during a mass update. 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 queued email records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

1. Navigate to the Email Queue list view by clicking the Email Queue link on the Admin page.
2. Use the list view's [Basic](#) or [Advanced Search](#) to find the queued email 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.
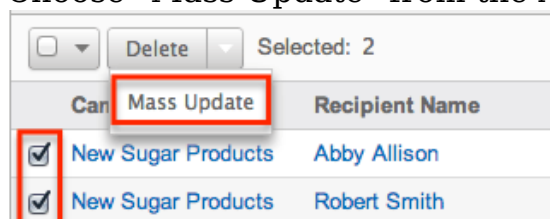
5. Scroll to the Mass Update panel and set values for the fields you wish to

alter.

Note: After an email has failed to send, setting In Process to "No" will flag the email to attempt to send again. Otherwise, the email will not attempt to be sent again until 24 hours have passed. Optionally set the Send Date to configure when the email should be attempted again.

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

Sending Queued Email

Email in the queue will be automatically be sent out in batches by the "Run Nightly Mass Email Campaigns" scheduler. For more information on setting up and configuring scheduler, please refer to the Schedulers documentation in the Administration Guide. Alternatively, you can manually send a batch of emails in the queue. The amount of queued email that will be sent is equal to the "Number of emails sent per batch" value specified in the Campaign Email Settings.

Use the following steps to manually send a batch of queued emails from the list view:

1. Navigate to the Email Queue list view by clicking the Email Queue link on the Admin page.
2. Choose "Send Queued Campaign Emails" from below the list view.

3. Sugar will then send a batch of queued email whose Send On date and time is equal to now or in the past.

Note: If an email fails to send it will not be tried again for 24 hours.

Selecting specific records and searching for specific records will not determine which queued emails will be sent. This process will send a batch of emails that are queued to be sent in order by the Send On field. For more information on setting the batch amount, please refer to the [Campaign Email Settings](#) section.

Note: If your batch size is set high and you have a lot of queued email, this process can take a while to run through a single batch.
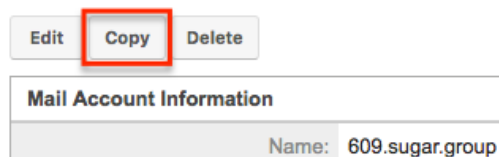
Creating via Duplication

You can also create a new group mail or bounce handling account by duplicating an existing inbound email account record. The copy option is useful if the inbound email account you are creating has similar information to an existing inbound email account.

Use the following steps to create an inbound email account by duplicating an existing record:

1. Navigate to an inbound email account record's detail view.
2. Click "Copy".
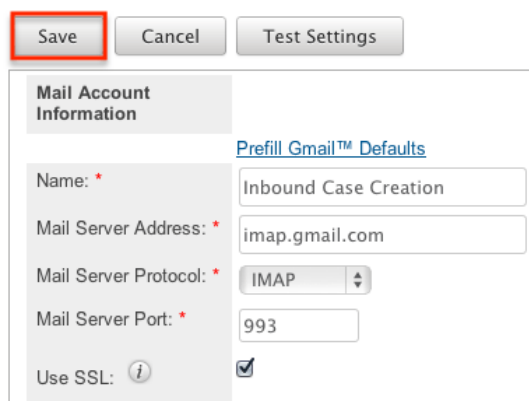
609.sugar.group

| Edit | **Copy** | Delete |

Mail Account Information

Name: 609.sugar.group

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

609.sugar.group

| Save | Cancel | Test Settings |

Mail Account Information

Prefill Gmail™ Defaults

Name: * Inbound Case Creation

Mail Server Address: * imap.gmail.com

Mail Server Protocol: * IMAP

Mail Server Port: * 993

Use SSL: ☑

Email Archiving

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 and imports the email into your instance of sugar and links related records without the use of a plug-in or other syncing process.
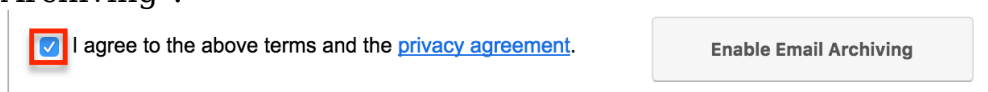
This section explains how the administrator can enable the Sugar Email Archiving service. For complete steps to use Sugar Email Archiving once it is enabled, please refer to the [Emails](#) documentation in the Application Guide.

Enabling Email Archiving

Before you can use Sugar Email Archiving, you need to enable the service for your instance. Email Archiving can be enabled for multiple instances per license key, but each instance must be registered independently and receive its own, unique email address. If you clone an instance that has Email Archiving enabled, the clone will show as having Email Archiving enabled, but must have the service disabled and re-enabled in order to receive its own email address and start using the service. For further troubleshooting information, refer to the [Troubleshooting the Sugar Email Archiving Service](#) article.

Use the following steps to enable email archiving via the Administration page:

1. In the Email section of the administration page, Select "Email Archiving".
2. Read the Email Archiving feature description, Master Subscription Agreement, and privacy policy.
3. Select the checkbox to agree to the teams and click "Enable Email Archiving".

   Note: Your instance needs to be reachable over the internet from SugarCRM's Email Archiving server. For more information, refer to the [Troubleshooting Sugar Email Archiving (SNIP) Activation](#) article.
4. The next screen displays the unique email address assigned to your instance for Email Archiving. Forward emails to this email address to automatically archive the messages to Sugar.
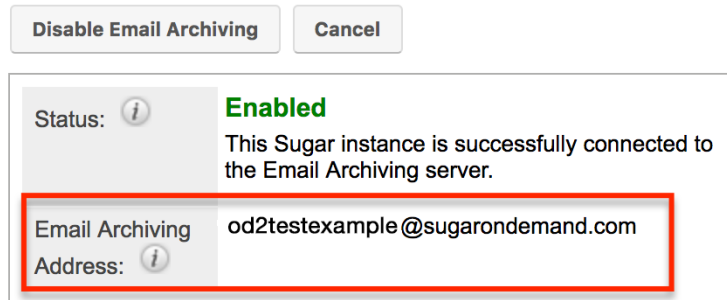
To begin using the email archiving service, please refer to the [Emails](#) documentation in the Application Guide. To turn off this feature, navigate to Admin > Email Archiving and click "Disable Email Archiving".

Note: If you disable and then re-enable Email Archiving, you will be assigned an archiving email address that is different than the one you were using before.

Inbound Email

Inbound Email allows external email to be pulled into Sugar. Inbound accounts can be configured as either [group email accounts](#) or [bounce email accounts](#). Group inbound accounts can be configured to create case records in Sugar or send automatic replies to imported email. Prior to Sugar 7.10.x, you could enable the "Allow users to send emails using the "From" Name and Address as the reply-to address" option to allow users on teams who had access to the group email account to be able to select the "From" name and email address associated with the group email account when composing emails in Sugar. As of Sugar 9.0.x, you can instead create shared email accounts directly via Emails > Email Settings which allows groups of users belonging to the assigned team(s) to send outbound email messages using the same email account (e.g. support@example.com). For more information on creating shared email accounts, please refer to the [Emails](#) documentation. The following sections will cover how to use the Inbound Email module as well as the various actions and options available from within the module.

Note: The Check Inbound Mailboxes scheduler must be configured and running in order to retrieve inbound email messages in Sugar. For more information on setting up and configuring the inbound email scheduler, please refer to the [Schedulers](#) documentation.

Inbound Email Fields

The Inbound Email module contains a number of stock fields that come out-of-the-box with Sugar in order to configure inbound email accounts. The below

definitions are the meanings for the available fields.

Field	Description
Assign To Teams	The Sugar team(s) assigned to the email record. **Note**: Users will only be able to see emails in group accounts as allowed by their team memberships.
Auto-Reply Template	Select an existing template or click "Create" to create a new one to send an automated response notifying email senders that you received their email. **Note**: If both Auto-Reply and Case Reply templates are selected, Sugar will respond to the sender with the Case Reply template only.
Create Case from Email	Select this option to create cases automatically from inbound emails. Only available for Group Accounts and defaults to not checked. For more information on creating cases via email, the distribution method, and case auto-reply, please refer to the Creating Cases From Email section.
Distribution Method	Only available if Create Case from Email is checked for a Group Account and allows you to select Round-Robin or Least-Busy for assigning the new cases.
Email Provider	Select the email provider for the inbound email account **Note**: The "Google Mail" and "Exchange Online" options allow you to connect your Sugar instance to these email services via OAuth2. The "Other" option covers all other email account configurations (e.g. Yahoo) that are supported in Sugar.
From Address	Enter the email address (e.g. serviceinfo@example.com) that will appear as the "From" email address for automatic responses to imported email. Defaults to the email address from your

	user profile.
From Name	Enter the name (e.g. Service Info) that will appear as the "From" name for automatic responses to imported email. Defaults to your first and last name from your user profile.
Import Emails Automatically	Select this option to create email records automatically in Sugar for all incoming emails. Only available for Group Accounts and defaults to checked.
Leave Messages On Server	Select this option if you do not want to remove emails from the server when they are opened in Sugar. This will allow the messages to remain visible and appear unread in other email clients. Only available for Group Accounts and defaults to Yes.
Mail Server Address	The web address of the external email server from which emails will be imported in Sugar.
Mail Server Port	The communication port number used for connecting to the mail server.
Mail Server Protocol	The mail protocol used to communicate with the mail server. IMAP is the default selection and provides the best functionality with Sugar.
Monitored Folders	The folders in your external account that Sugar will monitor. Inbox is selected by default. To select one or more folders to monitor click "Select" and then pick the folders in your external account for Sugar to monitor.
Name	The name or designation of the account.
New Case Auto-Reply Template	Only available if Create Case from Email is checked for a Group Account and allows you to select or create an automated response template notifying email senders that a case has been created to resolve their issue. For more information on creating cases via email, the distribution method, and

	case auto-reply, please refer to the [Creating Cases From Email](#) section.
No Auto-Reply to this Domain	Enter the domain name to exclude a domain from receiving the automatic email response. It is common to specify your organization's domain to prevent auto-replies from being sent to your organization's members.
Number of Auto-responses	Set the maximum number of auto-responses to be sent to a unique email address during a period of 24 hours.
Password	Enter the password associated with the email address or username.
Reply-to Address	Enter the email address that will receive any replies to the auto-reply template. If left blank, replies will be sent to the From Address.
Reply-to Name	Enter the name that will be used to receive any replies to the auto-reply template. If left blank, replies will be sent to the From Name.
Sent Folder	Select a folder from your external account to store any email being sent from that account through Sugar.
Status	The current status of the account (i.e. Active, Inactive).
Trash Folder	Select a folder from your external account to be designated as the trash folder. Sugar will place deleted emails into this folder on your external account.
Use SSL	Check this box to force the connection and communication between Sugar and the mail server to use a secure socket layer of encryption.
Username	Enter the email address or username used to connect to the SMTP server.

Inbound Email Module Tab

The Inbound Email module tab is typically located on the navigation bar at the top of any Sugar screen after selecting "Inbound Email" from the Admin page. Once in the Inbound Email list view, click the triangle in the Inbound Email 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 inbound email accounts you last viewed in the module.
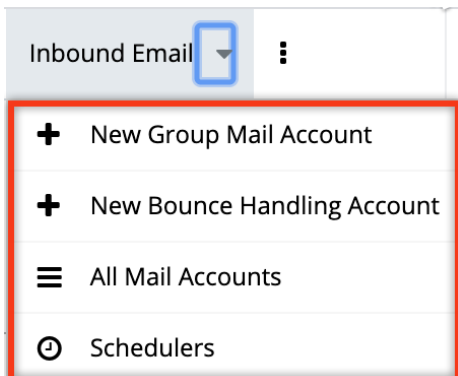
The Actions menu allows you to perform the following operations:

Menu Item	Description
New Group Mail Account	Opens the edit view layout to create a new Group Mail Account
New Bounce Handling Account	Opens the edit view layout to create a new Bounce Handling Account
All Mail Accounts	Opens the list view layout to display all inbound mail accounts
Schedulers	Opens the list view layout to search and display schedulers

Creating Inbound Email Accounts

There are various methods for creating inbound email accounts in Sugar. The full edit view layout opens when creating the inbound account directly from the Inbound Email menu and includes all of the relevant fields for your organization's accounts.

Creating Group Mail Accounts

One of the most common methods of Group Mail Account creation is via the New Group Mail Account option in the Inbound Email module tab. This opens up the edit view layout which allows you to enter all the relevant information for the group mail account. Please note that Group Mail Accounts will only import unread

messages from the mail server.

Use the following steps to create a group mail account via the Inbound Email module:

1. Navigate to Admin > Inbound Email.
2. Click the triangle in the Inbound Email module tab and select "New Group Mail Account".
3. Enter appropriate values for the [fields](#) in the edit view layout.
   Note: If your mail account is using Gmail, click "Prefill Gmail™ Defaults" to populate many fields with defaults to connect to Gmail.
4. Once the necessary information is entered, click "Save". Optionally, click "Test Settings" to verify your entries.

Creating Bounce Handling Accounts

One of the most common methods of Bounce Handling Account creation is via the New Bounce Handling Account option in the Inbound Email module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the bounce handling mail account.

Use the following steps to create a bounce handling account via the Inbound Email module:

1. Navigate to Admin > Inbound Email.
2. Click the triangle in the Inbound Email module tab and select "New Bounce Handling Account".
3. Enter appropriate values for the [fields](#) in the edit view layout.
   Note: If your mail account is using Gmail, click "Prefill Gmail™ Defaults" to populate many fields with defaults to connect to Gmail.
4. Once the necessary information is entered, click "Save". Optionally, click "Test Settings" to verify your entries.

Note: You can also set up a bounce handling account from the Campaigns module. For more information, refer to the [Campaigns](#) documentation.

Viewing Inbound Email Accounts

There are various options available for viewing inbound account records in Sugar including via Inbound Email list view, detail view, and Last Viewed menu.

Viewing via List View

The Inbound Email list view displays all inbound account records. To access the list view, simply click the Inbound Email module tab. While list view shows key inbound account fields, you can click the account's name to open the record in detail view. For more information on viewing inbound accounts via list view, please refer to the [Inbound Email List View](#) section.

Viewing via Detail View

The Inbound Email detail view displays thorough inbound account information including all fields. The detail view can be reached by clicking an account record's link from anywhere in the application including from the Inbound Email list view. For more information on viewing inbound accounts via detail view, please refer to the [Inbound Email Detail View](#) section.

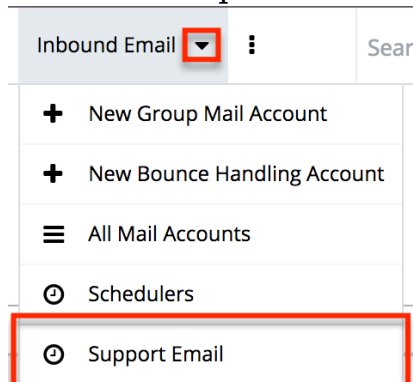### Viewing via Recently Viewed

As you work, Sugar will keep track of which inbound accounts you have recently

viewed. Click the triangle in the [Inbound Email module tab](#) to see a list of the 3 records you most recently viewed in the module. Clicking the record's name within the list will open the record in detail view.

Inbound Email List View

The Inbound Email list view displays all inbound account records meeting the current search criteria and to which your user has access. You can view the basic details of each account within the field columns.

Modifying the Case Macro

The Case Macro field determines what distinct string Sugar will use to match emails to the Cases module. The Case Macro is on the Inbound Email list view and displays the current case macro string. By default, this string is set to [CASE:%1]. To customize it, you can change CASE to a different word, but you must preserve the rest of the string; for example, [TICKET NUMBER:%1].

Note that the macro is case-sensitive and also takes spaces into consideration. As a result, capitalization and spacing must match the case macro to ensure that the email is related to the case. For example, using the default case macro of "[CASE:%1]", incoming emails must have no space before the case number and the text must use the same capitalization in order to be related to the existing case. That is, an email with the subject "[CASE:1234]" will automatically be related to case number 1234 while an email with the subject "[CASE: 1234]" or "[Case:1234]" will not.

Click "Save" to preserve your changes.

Pagination

List view displays the current results broken into pages that you can scroll through rather than displaying potentially thousands of rows at once. To the right just below the case macro 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.
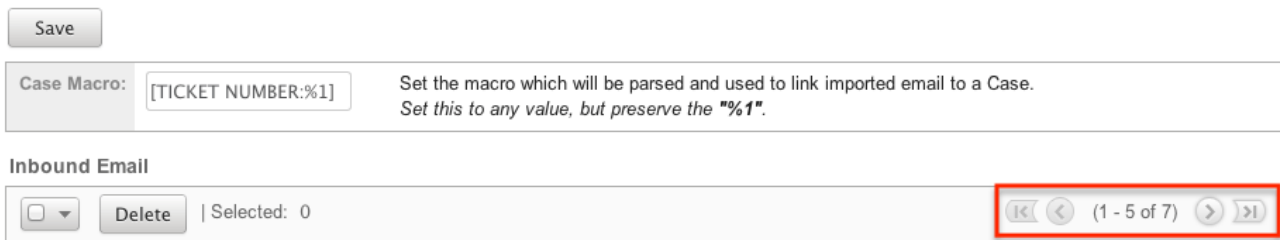
Checkbox Selection

You can perform several actions on inbound account records directly from the list view by first selecting the desired records. To select individual inbound account records on the Inbound Email list view, mark the checkbox on the left of each row. To select or deselect multiple inbound account 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 inbound account results.
- **Select All** : Selects all records across all pages of inbound account results.
- **Deselect All** : Deselects all records that are currently selected.
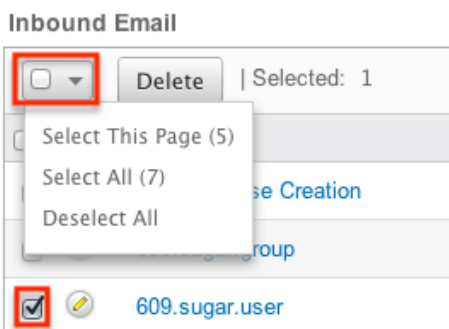
Action Buttons

The Actions menu to the right of the checkbox dropdown typically allows you to perform various actions on the currently selected records.
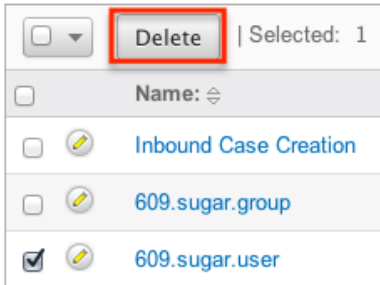
The only action available from the Inbound Email list view is the following operation:

Menu Item	Description
Delete	Delete one or more inbound accounts at a time

Column Sorting

List view provides the ability to sort all of the current 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.
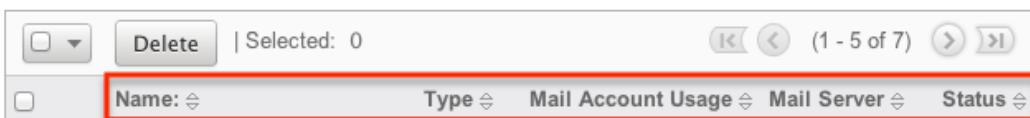
Inbound Email Detail View

The Inbound Email detail view displays thorough inbound account information including all inbound account fields which are grouped by default into the Mail Account Information and Advanced Setup panels. The detail view can be reached by clicking an inbound account record's link from anywhere in the application including from the Inbound Email list view.

Action Buttons

The Action Buttons on the top left of each inbound account's detail view allow you to perform various actions on the current record.

609.sugar.group

Edit	Copy	Delete

Mail Account Information

Name:	609.sugar.group
Mail Server Address:	imap.gmail.com
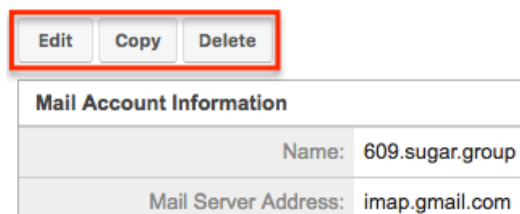
The action buttons allow you to perform the following operations:

Menu Item	Description
Edit	Edit this inbound account.
Copy	Duplicate this inbound email account.
Delete	Delete this inbound account.

Editing Inbound Email Accounts

Inbound accounts may be edited at any time to update or add information to the record. You can make changes to existing inbound account records via the Inbound Email edit view. Edit view is available within the Inbound Email module and includes all of the Inbound Email fields you should need.

Editing via Detail View

You can edit inbound accounts 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.

609.sugar.group

Edit	Copy	Delete

Mail Account Information

Name:	609.sugar.group
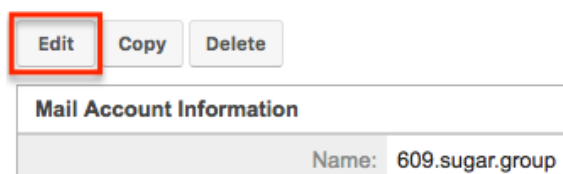
Editing via List View

You can edit inbound accounts via the [list view](#) by clicking the Pencil icon to the left of each inbound account's name. Once the edit view layout is open, update the necessary fields, then click "Save" to preserve your changes.
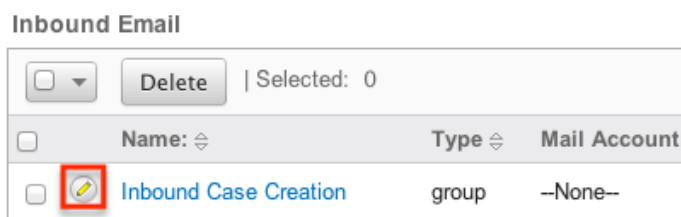
Deleting Inbound Email Accounts

If an inbound account record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Inbound Email 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 inbound account records will not delete the email imported from this account.

Deleting via Detail View

Use the following steps to delete an inbound account record via the detail view:

1. Navigate to an inbound email account record's detail view.
2. Click "Delete".
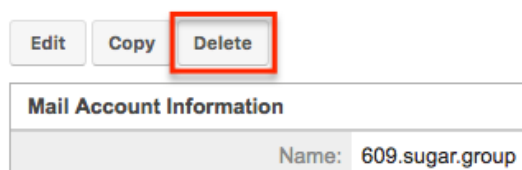
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Mass Deleting via List View

Use the following steps to delete one or more inbound email account records via the list view:

1. Navigate to the Inbound Email list view by clicking the Inbound Email module tab.
2. Select the desired inbound email account records individually or by using

the checkbox dropdown's options.

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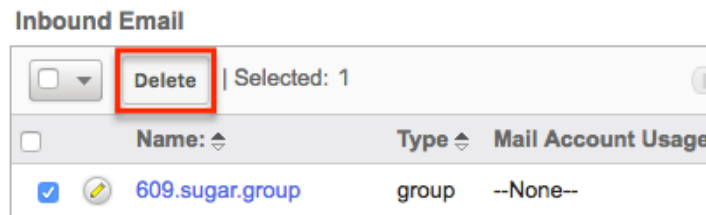
4. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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

Creating Cases From Email

To create a case via email, simply send an email to a group inbound email account that has the case creation option selected. The subject and description of the case are populated with the subject and body of the email respectively. The new case is assigned to the team defined in the inbound email account record and the case can be assigned to a specific user in that team based on two rules:

- **Round-Robin** : Sugar distributes cases evenly among all users within the team.
- **Least-Busy** : Sugar distributes cases to the least busy user within the team. Least busy is defined by the person with the least number of unread emails assigned to them.

Note: Case assignment is distributed to all members of the specified team, but excludes any inherited members of the team due to the "Reports To" structure. For more information on teams and the Reports To structure, please refer to the Team Management and User Management documentation in the Administration Guide.

Cases created from email are automatically related to contact and account records that match the email address in the From field of the email. If a case auto-reply template is specified, the sender of the email will receive an email based on the template selected. The response contains the system-generated case number formatted according to the case macro as a subject line. The body of the email displays below the template text. The case auto-reply also ignores the "No Auto-Reply to this Domain" setting.

Note: If both the Auto-Reply and Case Auto-Reply templates are selected, Sugar will respond to the sender with the Case Auto-Reply template only.

Developer Tools

Overview

The Developer Tools section of Sugar's Admin page contains various configuration menus that help you customize your instance to best suit your organization's needs. Developer Tools allow you to edit the look, feel, and functionality of your instance, including adding fields, changing layouts, adding automated processes, and creating entirely new modules.

The Developer Tools section contains the following menus:

Menu	Description
Studio	Modify fields, relationships, and layouts for existing modules
Module Builder	Create new modules to be deployed into this instance or exported to other Sugar instances
Module Loader	Upload and manage customization packages to your instance, such as additional modules or third-party integrations
Workflow Management	Manage automated processes in Sugar to optimize and streamline your company's business process
Rename Modules	Update the name of each module within Sugar
Display Modules and Subpanels	Hide or display modules and subpanels across the application
Configure Navigation Bar Quick Create	Configure which modules appear in the Quick Create menu on the navigation bar
Configure API Platforms	Manage platform identifiers for custom

	API integrations
[Dropdown Editor](#)	Manage dropdown lists to add new lists or edit existing lists

Studio

Studio enables administrators to customize stock or custom modules by modifying fields, page layouts, and more. This allows Sugar to be modified to ideally fit your organization's needs and terminology. Please note that only users with administrator or developer access have the ability to make changes via Admin > Studio. For more information on how to utilize Studio, please refer to the [Studio](#) documentation.

Module Builder

Module Builder enables administrators to create, deploy, and maintain custom modules in Sugar. For your convenience, the custom modules are based on templates such as Basic, Person, Company, etc. Modules can then be deployed within your instance of Sugar so that users can utilize the new module in their daily process. In addition, modules can be exported for additional development or published and then imported to other Sugar instances. For more information on using Module Builder, please refer to the [Module Builder](#) documentation.

Module Loader

Module Loader is used to import packages into Sugar that make changes to core files. Examples of module-loadable packages include Sugar custom modules that were created in Module Builder, language packs, third-party integrations, or any other type of file that would make changes to Sugar's core file system. Module Loader provides a portal within the application where zip files can be easily uploaded and then installed. For more information on how to use Module Loader, please refer to the [Module Loader](#) documentation.

Workflow Management

Sugar's Workflow functionality allows administrators to configure cause and effect type actions throughout Sugar and across multiple modules. Workflows can be used to update fields, send emails, or create records once certain sets of conditions are met. Workflows are a great way to configure automated processes within

Sugar so that users do not need to remember manual steps and instead can focus on their primary tasks and job responsibilities. Administrators can create and manage workflows via Admin > Workflow Management. For more information on workflows, please review the [Workflow Management](#) documentation.

Rename Modules

Depending on your business needs, it may be necessary to alter the display label to make the module's name (e.g. Contacts, Accounts, etc.) align with your various business components. Administrators can easily rename modules via Admin > Rename Modules. When editing a name, you are given the option to update both the singular and plural version of the word. This change will be reflected globally across Sugar so that every use of the given module name is updated to your preference, seamlessly to all users. You can also use the language dropdown list at the top of the page to rename the modules to a language other than English.

The following steps cover renaming the Contacts module as an example:

1. Navigate to Admin > Rename Modules.
2. Locate the module you wish to change and click the Pencil icon to the left of the module's name.
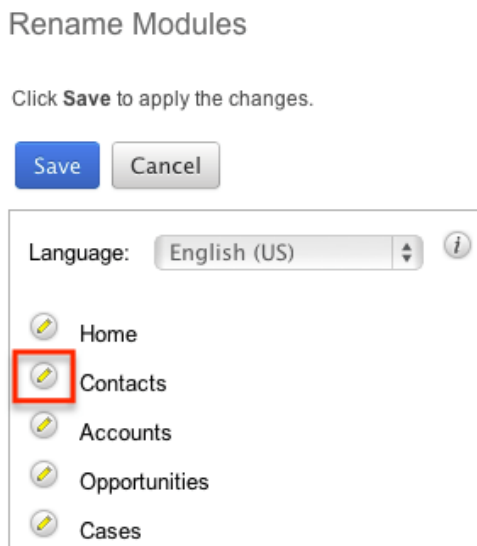
3. Enter a new singular and plural name for the module then click the Pencil icon again to close the text boxes.

4. Click "Save" to deploy your changes across your instance.

Display Modules and Subpanels

Administrators have the ability to control which modules and subpanels will appear in their instance via Admin > Display Modules and Subpanels. This option is useful as any unnecessary module(s) and subpanel(s) can be hidden to prevent users from accessing it. Please note that not every module and subpanel in Sugar is enabled by default when initially installed.

Once the "Display Modules and Subpanels" page is open, you will see the Displayed Modules, Hidden Modules, Displayed Subpanels, and Hidden Subpanels columns. To configure which modules are displayed on the navigation bar, drag and drop the module from the Hidden Modules column to the Displayed Modules column. To hide a module, simply drag and drop the module from the Displayed Modules column to the Hidden Modules column. To configure which subpanels appear in modules, drag and drop the module from the Hidden Subpanels column to the Displayed Subpanels column. To hide a subpanel, simply drag and drop the module from the Displayed Subpanels column to the Hidden Subpanels column. After making the necessary changes, click "Save" at the top of the page to deploy your changes or "Cancel" to revert back to your previous settings.

Please note that if a hidden module is related to a module that is visible in Sugar, it will display as a subpanel in the record view (for Sidecar modules) or detail view (for Legacy modules) of the related module. In addition, hidden modules continue to be available to users when viewing, creating, and managing reports via the Reports module. When a subpanel is hidden, users cannot view any related records from the record view (for Sidecar modules) or detail view (for Legacy modules) of the related module.

Users have the option to hide and display modules per their viewing preference via the User Profile. The list of available modules to display and hide in a user's account is based on the modules in the Displayed Modules column of the Display Modules and Subpanels page. To disable the users' ability to modify which modules are hidden or displayed on their navigation bar, uncheck the Allow users to select modules to appear in the navigation bar checkbox above the Displayed and Hidden Modules columns.

If you wish to prevent certain users from accessing specific modules in Sugar, you can keep the module enabled globally but assign a role to the user. For more information on creating and assigning roles, please refer to the Role Management documentation.

Configure Navigation Bar Quick Create

The Quick Create menu allows users 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. Administrators can easily configure the Quick Create menu via Admin > Configure Navigation Bar Quick Create menu to control which

modules are enabled/disabled, as well as the order the modules will appear in the menu.

Once the "Configure Navigation Bar Quick Create" page is open, you will see the Enabled Modules and Disabled Modules columns. Modules that appear within the Enabled Modules column will display in the Quick Create menu. To enable a module to be displayed in the Quick Create menu, drag and drop the module from the Disabled Modules column to the Enabled Modules column. To disable a module, simply drag and drop the module from the Enabled Modules column to the Disabled Modules column. You can also change the order of the modules as they appear in the Quick Create menu by dragging and dropping the modules up-and-down within the Enabled Modules list. After making the necessary changes, click "Save" at the top of the page to deploy your changes or "Cancel" to revert back to your previous settings.

Note: The Quick Create menu can display a maximum of 10 modules at one time.
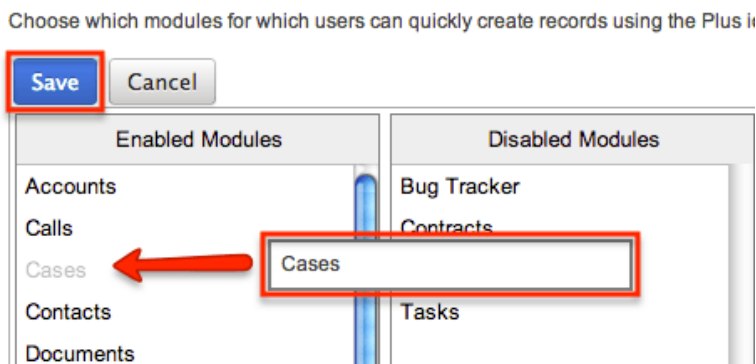
Configure API Platforms

Developers use the platform parameter to distinguish their custom platform from other clients when using the Sugar API. For example, when a user accesses Sugar via the desktop client and the mobile client simultaneously without being logged out of either, it is because the API recognizes that they are different platforms due to their unique platform identifiers. The platform identifier also makes it easy for a Sugar administrator to configure which API platforms are allowed to access their instance via Admin > Configure API Platforms.

Note: To learn more about platform identifiers, please refer to the [Dev Blog](#) in SugarClub.

The API Platforms panel is a list of client IDs that have been given permission to interact with your Sugar instance. The panel will automatically display some

standard platform identifiers required by every Sugar instance. The stock API platforms listed in the following table cannot be removed and must not be reused as platform identifiers for a custom integration.

API Platform Identifier	Platform/Client
base	Sugar desktop client (default platform)
mobile	Sugar Mobile app
portal	Sugar Portal (Enterprise, Ultimate, Sell, Serve)
opi	Sugar Plug-in for Microsoft Outlook 2.x
lpi	Sugar Plug-in for IBM Notes

To allow a new integration for your Sugar instance, find the package's platform parameter, enter it in the text box below the API Platforms panel, and then click "Add". You may need to ask your developer to check the .custom/clients/platforms.php file for this information. To remove any custom API platforms from the list, click the Remove icon next to the API platform identifier that you wish to remove. Upon removing the platform, all integrations that relied upon it will stop working.

Configure API Platforms

Alternatively, developers may choose to create a module loadable package to add custom identifier(s) via Sugar's Module Loader tool. To remove platform identifiers that were added via Module Loader, simply uninstall the package. More

information on adding platform identifiers via Module Loader can be found on the [Dev Blog](#) in SugarClub and the [Platforms](#) documentation in the Developer Guide.

Dropdown Editor

The Dropdown Editor allows administrators to view, modify, and create dropdown lists which can be added as fields in Sugar. Since dropdown lists are not module specific, they are stored and managed through the Dropdown Editor. Dropdown lists can only be associated with dropdown, multiselect, and radio-type fields via Admin > Studio. For more information on associating dropdown lists to the different field types, please refer to the [Studio](#) documentation.

Certain dropdown lists cannot be edited via the Dropdown editor as they are controlled by a separate area (e.g. Contract Types, Releases, etc.) of the Admin page. These include dropdown lists for the [Forecasting](#), [Bug Tracker](#), [Contracts](#), and [Products and Quotes](#) modules. Please refer to the appropriate sections of the Administration Guide for more information regarding the fields and how they can be edited.

Adding Dropdown Lists

Dropdown lists can be created at any time and added to a Dropdown type field via [Studio](#). When creating a list, please keep in mind that this list is not module specific, so be sure to properly name your list and any dropdown options to avoid any confusion in the future.

Use the following steps to create a dropdown list via Dropdown Editor:

1. Navigate to Admin > Dropdown Editor.
2. Click the Add Dropdown button, which is located above the list of existing dropdown lists.

3. Enter a name for your dropdown list in the Name field (e.g. "account_manager_list").
   - **Note:** The name must be alphanumeric and use the underscore character for spaces.

4. To create the items that will appear in your dropdown list, enter an "Item Name" and a "Display Label". Click "Add" once you have populated both fields to add the value to the dropdown list.
   ◦ The item name is the backend system name for the list item and must be alphanumeric. An underscore or a period can be used for the item name.
   ◦ The display label defines what will be displayed in the actual dropdown. Please note that there are no character restrictions when entering the display label. Click "Add" once you have populated both fields to add the value to the dropdown list.


5. Once all values have been added to your dropdown list, you can click one of the sort options to rearrange the values as desired. Lists can be sorted alphabetically in ascending or descending order based on the display label. You can also sort the list manually by dragging and dropping the values up-and-down the list.


6. Click "Save" at the top of the screen to complete and add your dropdown list. You will be directed back to the main dropdown editor page once the save completes.
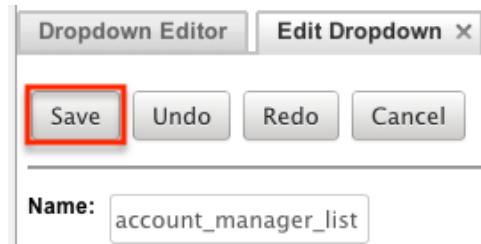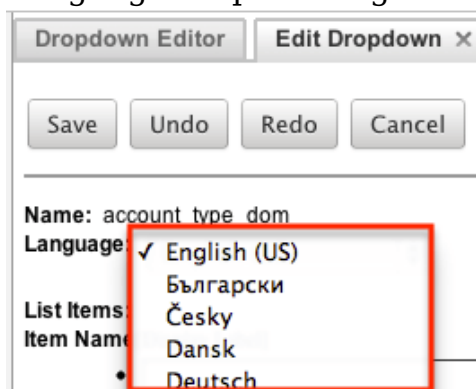
Viewing Dropdown Lists

The Dropdown Editor displays all existing dropdown lists in two separate sections (Dropdowns list, Dropdown Editor) on the page. The Dropdowns list to the left of the page displays the dropdown lists in alphabetical order. The Dropdown Editor tab displays the dropdown lists in columns and allows you to view more of the lists at once instead of scrolling down a single list.
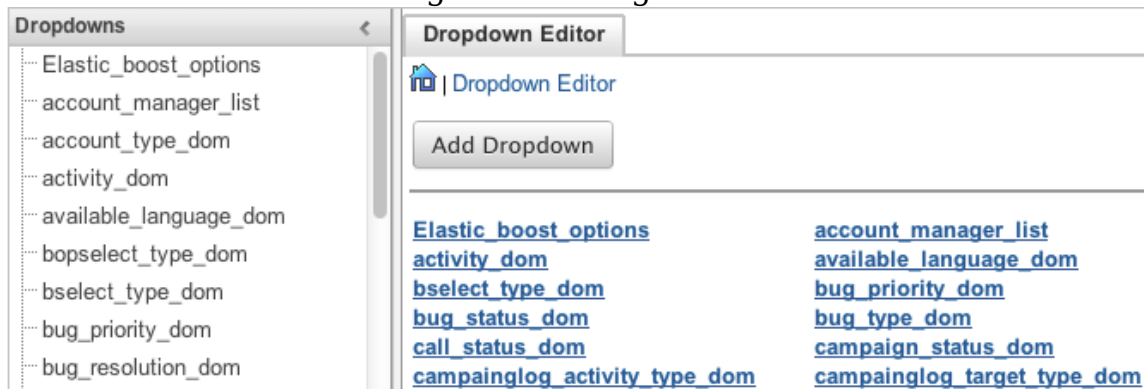
Once you locate the dropdown list you are looking for, click the list's name to open the Edit Dropdown tab to view and edit the list. The Edit Dropdown tab displays the name, the set language for the list, list values, and the item name. The list will be ordered as they appear in the dropdown list when added as a field to a layout. You can reorder the list if you wish by dragging and dropping the items into the desired positions.
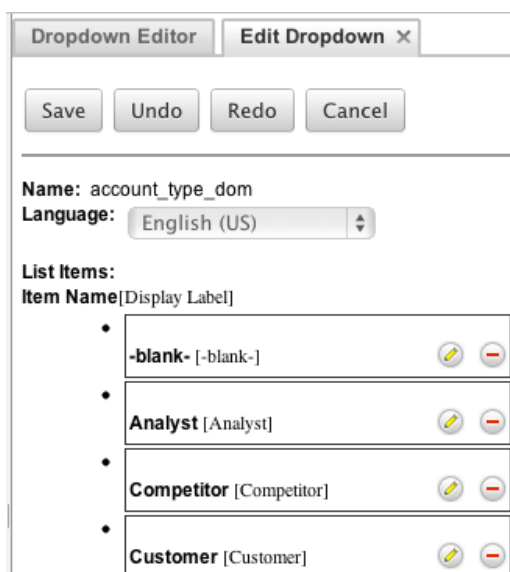
If your organization uses Sugar in languages other than English, Sugar can display translated dropdown lists for each language used. For example, Sugar will display French dropdown items when a user is logged into Sugar in French. You must provide the translations for each language by specifying display labels for each dropdown item. First, finalize your list's items by adding or removing items; the item names (a.k.a. database values) and order of items will be consistent across all languages. Choose the desired language in the Language dropdown above the list. Then, click the pencil icon for each item and enter a translated display label. When all labels have been translated, click "Save" to preserve your changes. After saving, the list will automatically be displayed in English, but you can change the Language dropdown again to check your labels.

Editing Dropdown Lists

Dropdown lists can easily be modified via the Dropdown Editor by selecting the specific dropdown list which opens the edit layout. You can reorder the items in the list, add new values, remove unnecessary values, change the display label for a value, or change the display label language.

Please note that the name of the dropdown list cannot be changed once created. Also, dropdown lists cannot be deleted since they can span multiple modules in Sugar and cause important data to be lost if removed in error. Once the necessary modifications have been made, click "Save" on the upper right to preserve the changes made.

To sort the list alphabetically, you can simply click the Sort Ascending or Sort Descending button on the bottom left of the tab view. Please note that the sorting is based on the display label. You can also reorder the items in your list, by dragging and dropping the items into the desired position.

To add a new value, enter an item name and corresponding display label below the list of existing values then click "Add". Please note that the item name is the back-end system name and must be alphanumeric without any special characters other than an underscore or a period. The text in the display label defines how the value will be displayed in the dropdown list when viewed in the user interface. Please note that there is no character restriction for the display label.
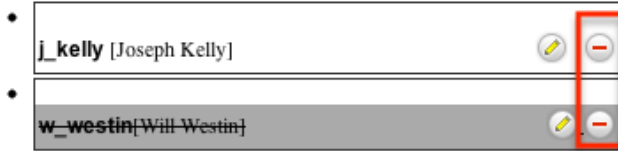
To remove a value from the list, click the Minus icon to the far right of the item row. Once deleted, the item will show a strikethrough and will be removed from the list once saved.

The item name of a dropdown value cannot be edited, but you can update the display label via the Dropdown Editor. Simply locate the value in the list then click the Pencil icon to the far right of the item row. Enter the new value into the open text box then click anywhere on the page to close the edit.

Editing Sales Stages

The Opportunities module contains two fields that function unlike other fields in Sugar. When the Sales Stage dropdown field is updated, the corresponding probability updates in the Probability (%) field. This is a unique function to the Opportunities module and when any changes are made to the sales_stage_dom list, you must consider the sales_probability_dom list as well to ensure the relationship between the two fields remain intact. For example, if you add a new sales stage (e.g. Item Name: "review_stage", Display Label: "Review Stage") to the sales_stage_dom list, then you must add a corresponding probability (e.g. Item Name: "review_stage", Display Label: "50") to the sales_probability_dom list in order for it to populate properly in the opportunity. The two lists' item names and order must match.

The Dropdown Editor contains both the sales_stage_dom and sales_probability_dom lists. Both dropdown lists have the same item name for all values, but different display labels.

- The sales_stage_dom list is associated with the Sales Stage field and displays the various sales stages (e.g. prospecting, qualification, closed won, etc.).
- The sales_probability_dom list is associated with the Probability (%) field and displays the corresponding probability value (e.g. 10, 20, 100, etc.) for

each sales stage.

Note: Both the sales_stage_dom and sales_status_dom lists must have "Closed Won" and "Closed Lost" as item names in order for the Forecasts module to function correctly. Never remove or change the item names for these two options.

For sales_stage_dom list:

Name: sales_stage_dom

Language: English (US)

List Items:
Item Name[Display Label]

- **Prospecting** [Prospecting]
- **Qualification** [Qualification]
- **Needs Analysis** [Needs Analysis]
- **Value Proposition** [Value Proposition]

For sales_probability_dom list:

Name: sales_probability_dom

Language: English (US)

List Items:
Item Name[Display Label]

- **Prospecting** [10]
- **Qualification** [20]
- **Needs Analysis** [25]
- **Value Proposition** [30]

Users can create similar logic for custom fields using Sugar Logic in Studio.

Editing Time Intervals

The "After Time Elapsed" workflow triggers after a specified period of time has elapsed from when a record save occurs in Sugar. For more information on "After Time Elapsed" workflows, please refer to the Workflow Management documentation. When creating the conditions for the workflow, you have the option to specify the time interval (e.g. 0 hours, 4 hours, 1 day, 1 week, etc.) used by the system to execute the workflow. The available time interval values can easily be modified via the Dropdown Editor.

The Dropdown Editor contains the "tselect_time_dom" list, which allows administrators to configure the time intervals used for time elapsed workflows. To add new time intervals to the dropdown list, simply enter the "Item Name" and "Display Label", keeping in mind that the item name must display the number of seconds corresponding to the new time interval. The display label value should have the time as it relates to minutes, hours, days, etc. For example, if you are adding 2 hours to the time interval list, the item name value will be "7200" and the display label will show "2 hours".

Relate Fields Denormalization

Relate Fields Denormalization is a Sugar administration tool that can be used by customers with very large database tables to optimize the database structure for faster sorting and data load of relate-type field values on list view pages. The denormalization process will copy the values of stock Sugar relate fields from their own tables into a text field (e.g., denorm_field_name) in the table of the related module (i.e. the parent table) via cron job. The new text field is then used for sorting in list views. Then, a logic hook will continue to monitor any value changes made to the relate field, the source field that the relate field points to, and to the linked record ID. The logic hook will also react to changes made to the relationship.

As an example, you may want to denormalize the Account Name relate field for the Opportunities module so that when you sort by Account Name in the Opportunities list view, Sugar will query its search against the field value in the Opportunities table instead of against the JOIN table for accounts_opportunities.

Note: While denormalizing the data will speed up sorting in list views, it may increase the time it takes to update records in the denormalized module (1-5% degradation in the worst case).

To denormalize a relate field in your instance, use the following steps:

1. Navigate to Admin > Relate Fields Denormalization, located in the Developer Tools section of the page.

2. Choose the module that contains the relate field you would like to denormalize. Each module's name will display a number that indicates how many relate fields are eligible for denormalization in that module. The following criteria must be met in order for a field to be eligible for field denormalization:
   - The field must be a stock relate-type field. Custom fields cannot be denormalized.
   - The field must be configured as "Available" in the list view layout for the module. For more information on list view layouts, refer to the [Studio](#) documentation.
   - The relate field must be sortable in the list view. This is not an admin configurable option, so we recommend confirming this before continuing.
3. Click on the field name that you want to denormalize under "Field List" and drag and drop it to the "Denormalized Fields" section on the right.

4. Click Save.
5. Review the Pre-check Results window and take note of the estimated time to complete, which could take up to an hour depending on the table sizes. Click "Confirm" to continue. Alternatively, you may choose to copy the SQL shown in the window, click "Cancel", and execute the command manually if you would prefer not to initiate the cron job.

After confirming, the process will continue in the background and show its progress in the Work Status field. You may click on the refresh icon to update the latest progress until it is "Done".

You may click on the Remove (x) icon to remove your scheduled denormalization job from the job queue, but as best practice, it is recommended to allow an in-process job to fully complete without stopping it. Denormalization changes that have been applied to a field can be reversed by moving it from the "Denormalized Fields" side back to "Field List" and clicking "Save". Reversing a denormalization action will remove the related logic hook and Sugar will resume using the regular field, but the denormalized field will still exist in the database.

Last Modified: 2020-11-30 17:17:29

Studio

Overview

Studio enables administrators to modify Sugar's fields, page layouts, and more to fit your organization's needs and terminology. Only users with administrator or developer access can make changes via Admin > Studio. This documentation will cover how to use Studio as well as the various actions and options available from within Studio.

Navigation

Studio's navigation is different than other modules within Sugar. Studio is divided into three main sections: the main panel, the Modules panel, and a footer.

Main Panel

The main panel in Studio is where you can access the modules, add fields, configure layouts, and perform other in-app customizations. It displays to the right of the Modules panel and houses the various components (e.g. fields, layouts, subpanels, etc.) of the module. As you select the different components, they will load in new tabs on the main panel.
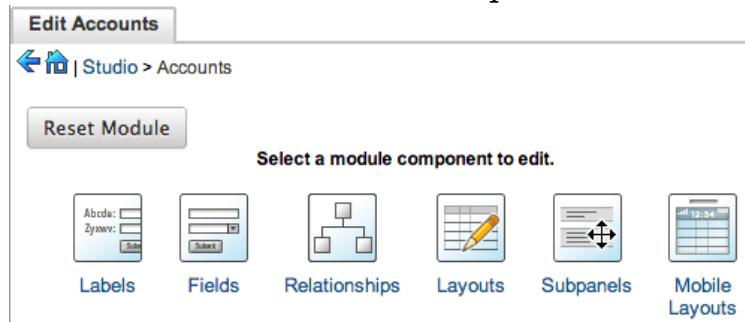
For example, if you select "Fields" on the main panel, the list of available fields along with the options to configure will appear under the Edit Fields tab. Additional tabs that appear as you configure the module can be closed by clicking the "X" within the tab.
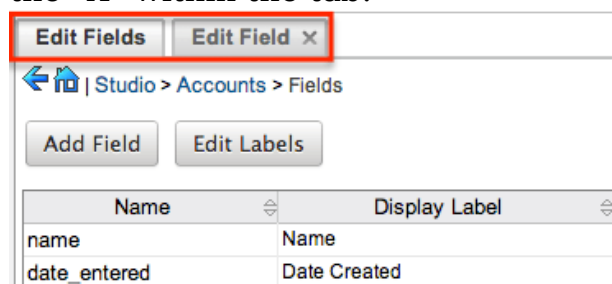
The main panel also includes a breadcrumb bar showing where in Studio you currently are. You can navigate to a specific section by clicking the link within the breadcrumb bar.
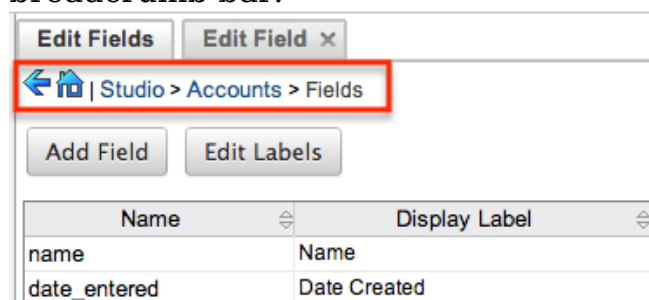

To go back to the previous page that you were viewing, click the Left arrow on the breadcrumb bar. Clicking the Home icon to the right of the arrow will navigate you back to the Developer Tools home page.

Modules Panel

The Modules panel is located to the left of the screen and displays a list of existing stock and custom modules that are editable through Studio. Please note that all

modules (e.g. Campaigns, etc.) using the Legacy user interface will display an asterisk (*) to the right of the module's name in Studio. The associated fields, labels, layouts, subpanels, etc. are grouped within each module. Click the plus sign (+) preceding the module name to expand the module tree and display the associated items (e.g. fields, layouts, etc.). Simply select an item in the Modules panel to load the view in the main panel to the right.
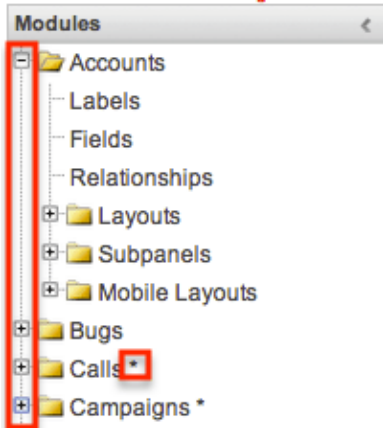
Please note that if you do not see the Modules panel, it may be collapsed. Locate the gray bar to the left of the main panel and click the Right arrow to expand the Modules panel.
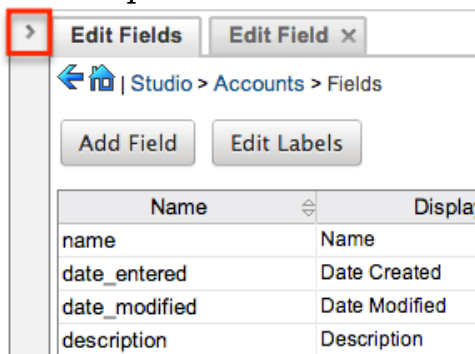
Footer

The footer is located at the bottom of Studio pages and displays buttons that enable you to navigate to the different areas (e.g. Dropdown Editor) of Developer Tools.
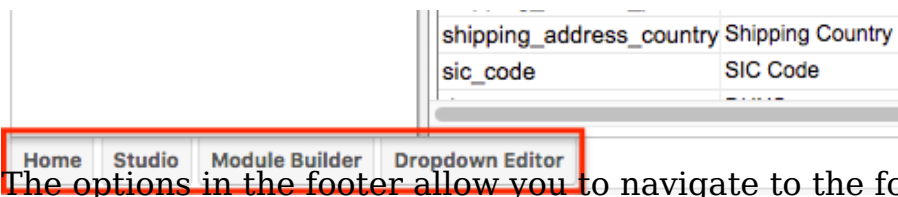
The options in the footer allow you to navigate to the following locations:

Menu Item	Description
Home	Navigates to the home page of the

	Developer Tools
Studio	Navigates to the home page of Studio
Module Builder	Opens Module Builder to create or edit modules
Dropdown Editor	Opens the Dropdown Editor to modify dropdown options

Editing Labels

Labels are used throughout Sugar to designate field headers, subpanel titles, error messages, and more. To modify the labels for a module, select "Labels" from the Modules panel under the desired module (e.g. Accounts). Please note that HTML tags are not supported in labels.
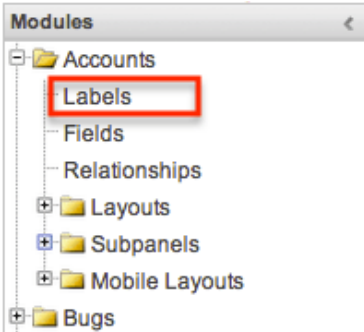

The Edit Labels tab will open in the main panel displaying all the labels associated with the module. Please note that you can change the language for the labels by selecting from the Language dropdown list.
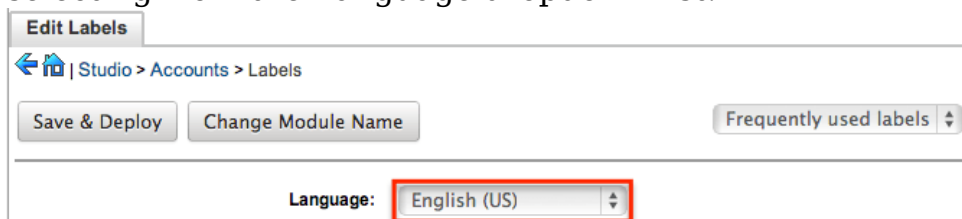
If the label you wish to change cannot be found, change the filter dropdown option from "Frequently used labels" to "All Labels".
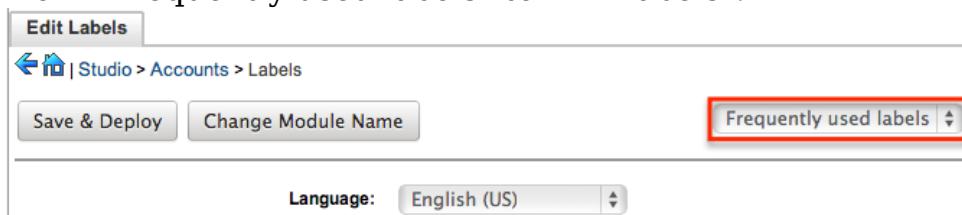
Modify the labels accordingly per the selected language and click "Save and Deploy" when complete. This will save your changes and instantly deploy them to your Sugar instance.

To change the name of the module, click "Change Module Name" to the right of the Save & Deploy button.

This will direct you to the Rename Modules page where you can change the labels for the module accordingly. For more information on how to rename modules, please refer to the Rename Modules section of the Developer Tools documentation.

Fields

The Fields section in Studio allows administrators to create new fields for stock and custom modules as well as update existing fields. To access the Fields section in Studio, select "Fields" from the Modules panel under the desired module (e.g. Cases) and the Edit Fields tab will open in the main panel.
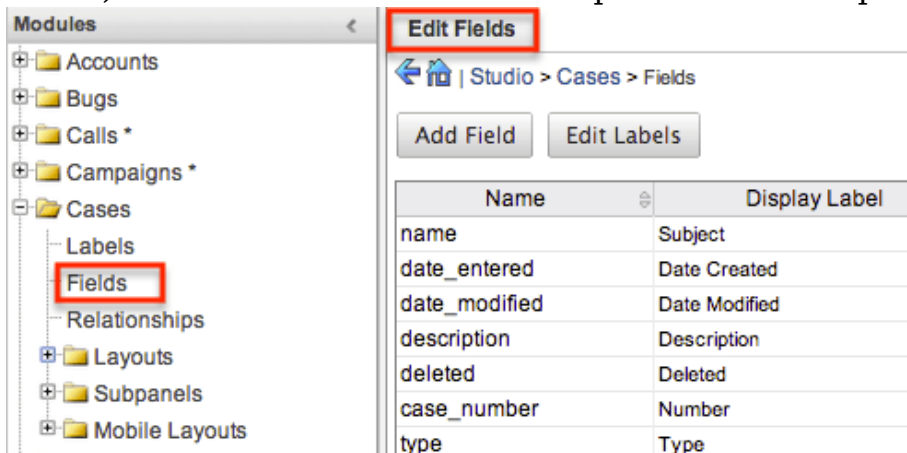
Field Types

Studio comes out-of-the-box with many different types of fields, which can be created in Sugar. Please note that the options and properties available when configuring the field varies for each data type.

The following data types are available when creating fields in Studio:

Data Type	Description
Address	Creates fields for street, city, postal code, state, and country. **Note**: Custom address fields cannot be grouped together like stock address fields (e.g. billing address).
AutoIncrement	Creates a field that automatically populates a number, increasing subsequent records' field values by one, on the first save of a record. As an integer-type field, AutoIncrement is limited at the database level to values up through 2147483647. **Note**: This field cannot be edited.
Checkbox	Creates a checkbox for data fields with a Yes/No action.
Currency	Creates a field to enter a currency value. The system automatically creates a dropdown of the currency type if the field does not already exist in that module.
Date	Creates a field to enter a date. Includes a button for a calendar popup.
DateTime	Creates a field to enter the date and time. Includes a Calendar icon button to choose a date via the popup calendar, as well as a dropdown list to select the time.
Decimal	Creates a field to hold a number rounded to a specified decimal precision. Sugar stores the exact representation of the number in the database (e.g. For a precision of 2: 1.236 is stored as 1.24).
Dropdown	Creates a field where you can associate a dropdown list of values.
Encrypt	Creates a field for sensitive information, such as social security numbers, whose

	value is to be encrypted in the Sugar database. The value is encrypted using the Blowfish algorithm prior to being captured in the database. It is decrypted prior to display in the user interface to users. The first time an encrypted field is enabled, a unique key is automatically generated and stored on the filesystem in the file ./custom/blowfish/encrypt_field.php. This generated key is used for all subsequent field level encryption and decryption operations.
Flex Relate	Creates a dropdown list from which you can relate a single record from a variety of modules. See the [Introduction to Relationships and Relate Fields](#) article for an explanation of the differences between relate fields, flex relate fields, and relationships. **Note**: Only one Flex Relate-type field is allowed per module. Out of the box, the Flex Relate option is not available for the Accounts, Calls, Contracts, Meetings, Notes, and Tasks modules.
Float	Creates a field to hold a number rounded to a specified decimal precision. Sugar stores the value differently based on the database platform Sugar is running on.
HTML	Creates static HTML-formatted text to display in record views.
Iframe	Creates a field to store or generate a URL to display an iframe in record views.
Image	Creates an image field to upload an image to display on a record.
Integer	Creates a field to specify positive or negative numbers with no decimal places. **Note**: Integer fields are limited at the database level to values up through

	2147483647.
MultiSelect	Creates a dropdown list of values where multiple values can be selected at once.
Phone	Creates a field to enter a phone number. If the Enable Click-to-Call setting is turned on in Admin > System Settings, phone number fields are displayed as links that can be opened to dial them using the default computer telephony integration software on the user's computer.
Radio	Creates a radio button for a user to select one value from a dropdown list.
Relate	Creates a field to associate a record with another module's record as a one-way relationship. You can add multiple Relate fields to a module. **Note**: Relate fields and custom relationships are independent of each other. Changes made to either one are not reflected in the other. Relate fields can be added to a report, but any data on the related record cannot be accessed in the report. To access related record data in a report you will need to create a custom relationship. See the Introduction to Relationships and Relate Fields article for an explanation of the differences between relate fields and relationships.
TextArea	Creates an open text area field for multiple lines of text.
TextField	Creates a field for a single line of text.
URL	Creates a field to store or generate a URL and display as a link.

Note: Name-type and ID-type fields cannot be created via Studio. Each stock module and module created via Module Builder will have a Name-type and ID-type field. The Name-type field is automatically displayed in the header of each record view (for Sidecar modules) while the ID field is not available in Studio but is a part of the unique URL for each record.

Field Options

Fields provide ways to store different data types in Sugar. While many fields come with Sugar by default, there can be instances where your organization needs to create custom fields to store additional data.

Each field, depending on the data type, will have different properties and options available when configuring the field via Studio. Please note that some properties can exist across all data types and some are unique to only a few types.

The following properties and options are available for fields in Studio:

- **Allow Imports**: Select one of the following options to determine the field's behavior when importing records:
  - **Yes**: This field is available to be mapped to when performing an import.
  - **No**: This field is not available to be mapped to when performing an import. It will be omitted from the Module Field dropdown list.
  - **Required**: This field is required to be mapped to when performing an import. It will have an asterisk (*) next to it in the Module Field dropdown list to indicate that it is required.
- **Audit**: Select this checkbox to audit the field for changes made in Sugar.
  - Users can view the changes made to audited fields via the View Audit Log option in the module's record view (for Sidecar modules) or detail view (for Legacy modules).
  - Fields marked as "Audit" will generate update posts in the activity stream for Sidecar modules (e.g. Accounts, Contacts, etc.) whenever the field gets updated. For more information on activity streams, please refer to the Activity Streams documentation.
- **AutoIncrement Next Value**: Available for the AutoIncrement field type, this field allows you to set and view which value is the next to be applied to a record.
  - **Note**: As an integer-type field, AutoIncrement is limited at the database level to values up through 2147483647.
- **Boost value**: Enter a boost value for the field to enhance the relevancy of the field for full-text search.
  - The default boost value is 1.0 which indicates 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.
  - **Note**: It is not necessary to perform a full system index when boost values are changed for fields.
- **Border**: For Image data type fields, select this checkbox to add a border around the image for this field.
- **Calculated Value**: Select this checkbox to designate this field as a

calculated field.
  - This opens up the Formula option and disables the Default Value and Importable options. For more information regarding entering a formula for a calculated value, please refer to the Formula option listed in this section.
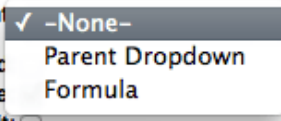
  Calculated Value: ☑ ⓘ
  Formula: [   ] [Edit Formula]

  - The result of the formula will be entered into the field for any new or modified records. When selecting this option, the field value cannot be modified by users.
  - **Note**: The Calculated Value option is only available for the following data type fields:

Checkbox	Currency
Date	Datetime
Decimal	Encrypt
Float	Integer
Phone	TextArea
TextField	

- **Columns**: For TextArea data type fields, enter the number of columns to specify the width of a TextArea data type field.
- **Comment Text**: Enter a comment or description about the field. The comment text is only viewable via Studio.
  - **Note**: The Comment Text option is available for all data type fields except Flex Relate.
- **Default Value**: Specify or select a default value for this field when a record is created. Default values for the record are populated by default but can be modified by users.
  - **Note**: The Default Value option is available for all data type fields except HTML, Image, Flex Relate, and Relate.
- **Dependent**: Select this option to designate this field as being dependent on a formula or a parent dropdown.
  - For dropdown data type fields you can select "Parent Dropdown" or "Formula" for the dependency.

  Dependent ✓ –None–
  Required Field Parent Dropdown
  Reportable Formula
  Audit:

  - Selecting "Parent Dropdown" will open the Parent Dropdown option as shown below. Selecting "Formula" will open the "Visible If" option to create a dependency formula. For other field data types (e.g. Date), select the Dependent checkbox to open the Visible If option. For more information regarding entering a formula to make

a dependent field visible, please refer to the Visible If option listed in this section.

- **Note**: The Dependent option is available for all data type fields except Address.
- **Disable Format**: For Integer data type fields, select this checkbox to disable number formatting such as the thousands separator.
- **Display Label**: Enter a value to display as the field label and header in layouts. Normally defaults to the Field name entered when creating field.
    - This value is also modifiable via the Labels section of Studio.
    - **Note**: The Display Label option is available for all data type fields except Flex Relate. Flex Relate uses the Label Value option.
- **Drop Down List**: Select a list of values to associate to the field.

    - Only values in the chosen list will be available for selection in the field. Click "Edit" to change the values for the currently selected list, or click "Add" to create a new list.
    - **Note**: The Dropdown List option is only available for the dropdown, multiselect, and radio data type fields. For more information on editing dropdown values via the Dropdown Editor, please refer to the Editing Dropdown Lists section of the Developer Tools documentation.
- **Duplicate Merge**: Select one of the following options to determine the field's functionality when records are being merged:
    - **Disabled**: Selected by default. The field will not appear on the Merge Duplicates screen.
    - **Enabled**: The field will appear on the Merge Duplicates screen.
    - **In Filter**: (Legacy/BWC modules only) The field will appear in the Merge Duplicates feature, and will also be available in the Find Duplicates feature.
    - **Default Selected Filter**: (Legacy/BWC modules only) The field will be used for a filter condition by default in the Find Duplicates page, and will also appear in the Merge Duplicates feature.
    - **Filter Only**: (Legacy/BWC modules only) The field will not appear in the Merge Duplicates feature but will be available in the Find Duplicates feature.
    - **Note**: The Duplicate Merge option is available for all data type fields except Image.
- **Field Name**: Enter the name of the field being created. Once a field has been created the field name cannot be changed.
    - Field names can contain only alphanumeric characters as well as the underscore character.

- Custom fields added via Studio are automatically appended with "_c" to ensure the field does not conflict with a current or future stock field.
- **Full Text Searchable**: Specify whether or not the field should affect Global Search results.
  - **Disabled**: Select "Disabled" if you do not want this field to be captured when the database is indexed for searches. Search indices collect the values of searchable fields for evaluation by the Global Search.
  - **Searchable**: Select "Searchable" to include this field's value in search indexes.
    - Selecting "Searchable" will reveal the Boost value field, which allows you to set a relevance weight for searches. When a user's search query matches the value of a field with a higher boost level, the record will appear higher in the search results. For more information regarding boost values in Full-Text Search, please refer to the Search documentation in the Application Guide.
    - The Full Text Searchable option is only available for the following data type fields:

Phone	TextArea
TextField	URL

  - **Note**: For a list of searchable fields for each module for global search, please refer to the Search documentation in the Application Guide.
- **Formula**: Contains the current formula to return a calculated value.
  - Click "Edit Formula" to launch the formula builder and change the formula. For more information on how to build a formula using the formula builder, please refer to the Using Sugar Logic section of this documentation.

  Calculated Value: ☑ ⓘ
  Formula: ifElse(equal($account_   [Edit Formula]

  - **Note**: The Formula option is only available when the Calculated Value option is selected when editing or creating a field.
- **Generate URL**: For Iframe and URL data type fields, select this checkbox to allow variables from the current module to be placed into the Default Value option for creating dynamic URLs.

  Generate URL: ☑
  [billing_address_postalcode ▼] [Insert Field]
  Default Value: [ı/maps?q=[billing_adc]

  - This is useful for providing links or Iframes to internal systems such as an ERP or to external systems such as Google Maps.

- Select the desired field to add from the dropdown and click "Insert Field" to add the field to the Default Value. When selecting this option, the field value cannot be modified by users.
- **Height**: For Image data type fields, enter the number of pixels to vertically scale the image for this field. Enter only the Width or Height options to retain the aspect ratio of the image.
- **Help Text**: Enter basic instructions for populating this field. The text entered here will display below the field when creating or editing a record for modules using the Sidecar user interface. For modules using the Legacy user interface, the help text will appear when users hover their mouse within the field in the Edit View layout.
- **HTML**: For HTML data type fields, enter static rich text with formatting or HTML code to display on a record. For more information on how to use the text editor please refer to the TinyMCE section of the User Interface documentation in the Application Guide.

- **Iframe Height**: For Iframe data type fields, enter the number of pixels for the height of the Iframe field. The width of the Iframe field is always the width of the field container.
- **Importable**: Select one of the following options to determine the field's functionality when records are being imported:
  - **Yes**: The field can be included in an import operation.
  - **No**: The field cannot be included in an import.
  - **Required**: A value for the field must be provided in any import.
- **Label Value**: For Flex Relate data type fields, enter a value to display as the field label and header in layouts. This value is also modifiable in the Modules panel under Labels. Defaults to "Flex Relate".
- **Mass Update**: Select this checkbox to add this field as an option to mass update.
  - **Note**: The Mass Update option is only available for the following data type fields:

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

- **Max Size**: Enter the maximum number of charactersallowed for this field. Defaults to 255.
  - **Note**: The Max Size option is only available for the following data

type fields:

Address	Decimal
Float	Iframe
Integer	Phone
URL	TextField

- **Max Value**: For Integer data type fields, enter the highest value allowable for this field. If a user enters a higher value in the field than the specified value, a notification will appear upon save informing them of the set maximum value.
  - **Note**: Integer fields are limited at the database level to values up through 2147483647.
- **Min Value**: For Integer data type fields, Enter the lowest value allowable for this field. If a user enters a value in the field that is lower than the specified value, a notification will appear upon save informing them of the set minimum value.
- **Module**: For Relate data type fields, select a module from the dropdown to relate to the current module.
  - A module can relate back to itself, a good example of this would be a relate field on Contacts to relate back to Contacts for a referred by field. This will allow users to select which contact record referred a different contact. The chosen module cannot be modified once the field is created.

- **Open Link In**: For URL data type fields, select one of the following options to determine how a URL will open:
  - **New Window**: Opens the URL in a new Tab or Window depending on your browser and settings.
  - **Same Window**: Opens the URL in the same window as the record you are currently browsing.
- **Parent Dropdown**: When the Dependent option has "Parent Dropdown" selected, choose an option from the dropdown to specify the parent that controls the visibility of this dropdown field.
  - The Parent Dropdown option is populated with the other dropdown data type fields in the current module.

  - Click "Edit Visibility" to specify which options are available from the current dropdown for each value of the parent dropdown. In the Visibility Editor window, drag values from the current dropdown list to the value sections of the parent dropdown.

- ○ This will determine which options in the dropdown list are available when the parent dropdown is set to the specified value. In this example, if the parent dropdown is set to "Apparel", then the current dropdown will have options 1, 2, and 3 where if the parent dropdown is set to "Banking", then the current dropdown will only have options 2 and 3 available. If there are no available options for a parent dropdown value, then the dependent dropdown will not display. To remove an item from the list, simply click and drag the value to the Trash bin on the left. Once the values are set, click "Save" to preserve your changes.

- **Precision**: For Decimal and Float data type fields, enter a number to specify the number of digits to the right of the decimal point the value should be stored as in Sugar.
- **Read-Only Field** : Select this checkbox to mark the field as read-only in Sugar. The user will not be able to enter a value for the field when editing the record.
  - ○ **Read-Only If**: The "Read-Only If" option is only available when the Read-Only Field option is checked. It defines the criteria that determine when the field is read-only on the layout.
    - ▪ If left blank, the field will always be read-only.
    - ▪ To make it read-only conditionally, click "Edit Formula" to launch the formula builder. For more information on how to build a formula using the formula builder, please refer to the Using Sugar Logic section of this documentation.

- **Reportable**: Select this checkbox to allow the field to be used in reports.
  - ○ **Note**: The Reportable option is available for all data type fields except Encrypt, Flex Relate, HTML, Iframe, and Image.

- **Required Field**: Select this checkbox to mark the field as required in Sugar. The user will be required to enter a value for the field when saving the record.
  Note: The Required option is available for all data type fields except Checkbox and HTML.
    - **Required If**: The "Required If" option is only available when the Required Field option is checked. It defines the criteria that determine when the field is required on the layout.
        - If left blank, the field will always be required.
        - To make it required conditionally, click "Edit Formula" to launch the formula builder. For more information on how to build a formula using the formula builder, please refer to the Using Sugar Logic section of this documentation.

- **Rows**: For TextArea data type fields, enter the number of rows to specify the height of a TextArea data type field.
- **System Label**: Enter the system value for storing the label of the field. This is defaulted to the name of the field preceded with "LBL_". Any lowercase characters entered will be converted to an uppercase upon saving. Once the field has been created, the system label cannot be changed.
    - It is recommended that administrators avoid naming fields with the same system label in order to prevent the same label and header values from existing in the system.
- **Visible If**: Contains the current formula to determine if a field is visible on the layout or not. Click "Edit Formula" to launch the formula builder to change the formula.

    - The formula must result in a Boolean (true/false) response. For more information on how to build a formula using the formula builder, please refer to the Using Sugar Logic section of this documentation.
    - **Note**: The "Visible If" option is only available when the Dependent option is checked or "Formula" is selected from the dropdown.
- **Width**: Enter the number of pixels to horizontally scale the image for this field. Enter only the Width or Height options to retain the aspect ratio of the image.
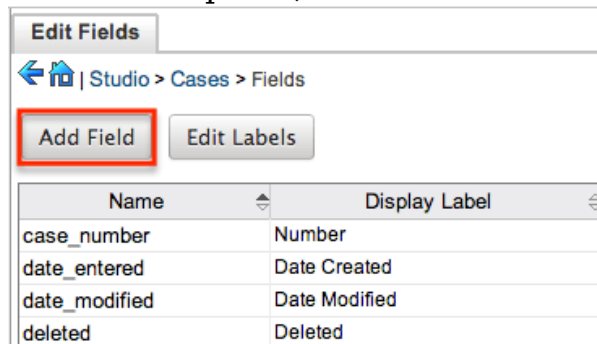   - **Note**: The Width option is only available for Image data type fields.

Creating Fields

Use the following steps to create a new field via Studio:

1. Expand out the tree under the desired module (e.g. Cases) in the Modules panel and select "Fields".
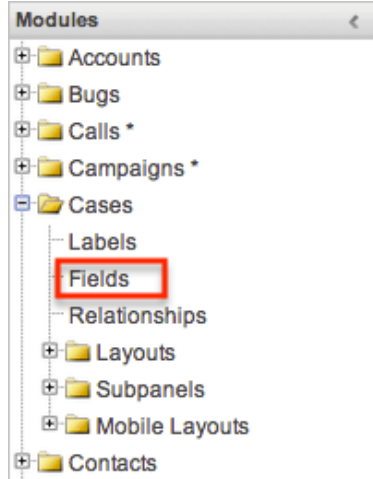
2. In the main panel, click "Add Field".

3. Enter appropriate values for the Field Options.
   **Note**: Field Name is required.
4. Once the necessary information is entered, click "Save".

Please note that once a field is created, it must be placed on the record view (for Sidecar modules) or edit view (for Legacy modules) layout before users can enter data into that field. For more information on editing layouts, please refer to the [Editing Layouts](#) section of this documentation.

Editing Fields

Use the following steps to edit an existing field via Studio:

1. Expand out the tree under the desired module (e.g. Cases) in the Modules panel and select "Fields".
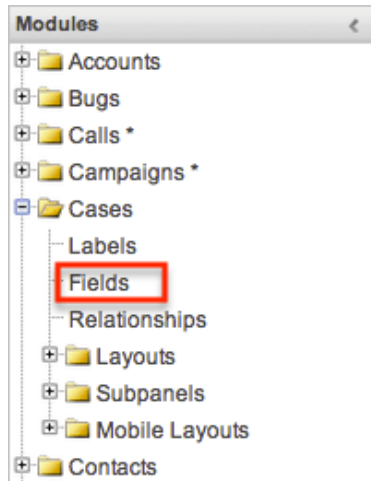
2. In the main panel, select a field to edit. Sorting the fields by the column header will help in locating the field faster.
   - **Note**: Fields created via Studio will display an asterisk next to their names.
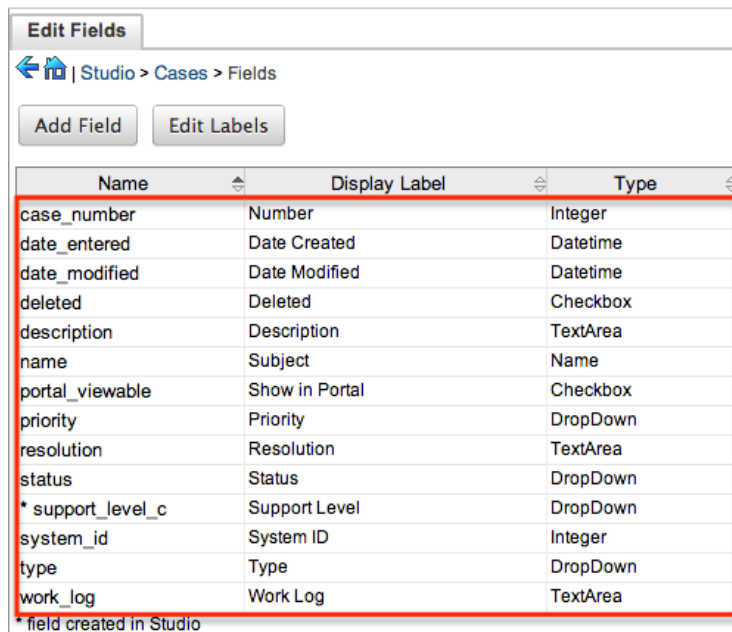
3. Enter appropriate values for the [Field Options].
4. Once the necessary information is entered, click "Save".
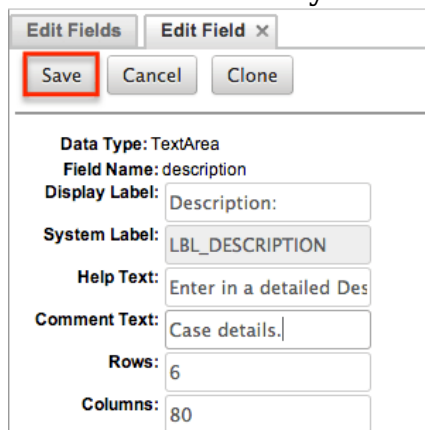
Deleting Fields

Use the following steps to delete an existing field via Studio:

1. Expand out the tree under the desired module (e.g. Cases) in the Modules panel and select "Fields".
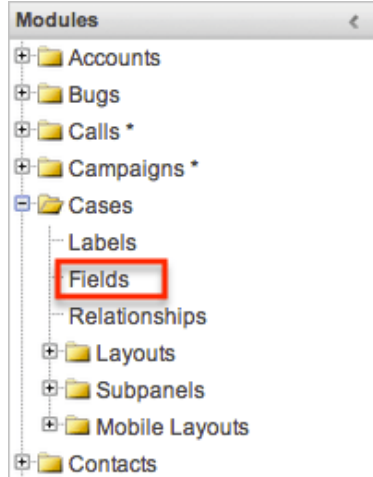
2. In the main panel, select a field to delete. Sorting the fields by the column header will help in locating the field faster.
   - Fields created via Studio will display an asterisk (*) next to their names.
   - **Note**: Stock fields cannot be deleted.
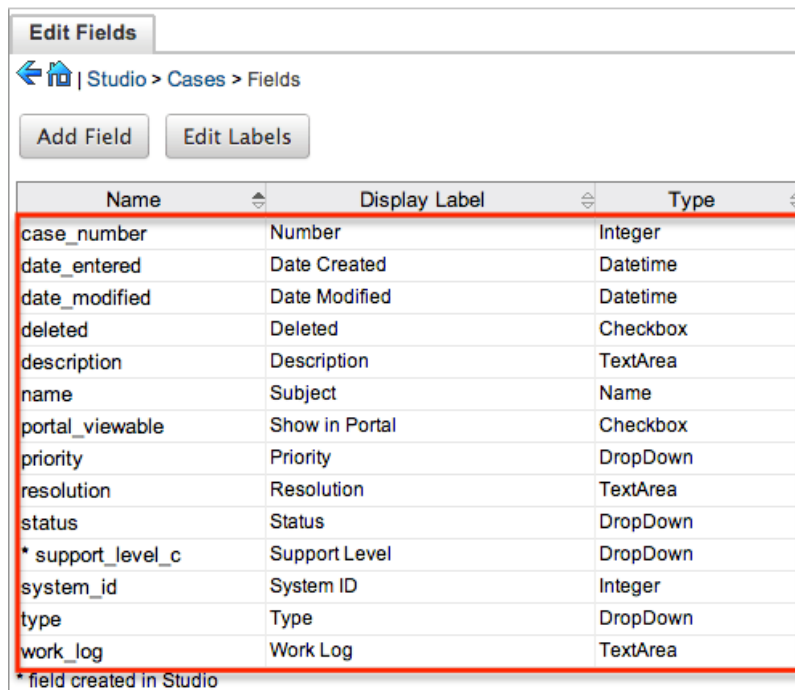
3. Click "Delete" to remove the field.

4. A pop-up message will display asking for confirmation. Click "Ok" to proceed.
   - When deleting fields, both the field and all the data related to the field in the database will be permanently removed. Before deleting a field, confirm that the field is no longer used or displayed in the following places:
     - Report filters or display columns
     - Workflows that filter by or display the field
     - Dashlets that filter by or display the field
     - Sugar Logic formulas for other fields
     - Email templates
     - Saved searches (legacy modules)
5. The field will automatically be removed from any module layouts when deleted.

Cloning Fields

Use the following steps to clone an existing field via Studio:

1. Expand out the tree under the desired module (e.g. Cases) in the Modules panel and select "Fields".
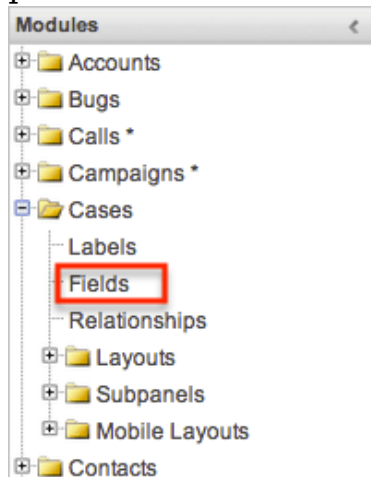
2. In the main panel, select a field to clone. Sorting the fields by the column header will help in locating the field faster.
   - **Note**: Fields created via Studio will display an asterisk (*) next to their names.

3. Select "Clone" to duplicate the field.
   - **Note**: Some non-standard stock fields (e.g. Name) do not have the ability to clone.

4. Enter appropriate values for the Field Options.
5. Once the necessary information is entered, click "Save".

Relationships

Relationships define the links between different modules in Sugar and allow records between those modules to be related. Related records display in fields or subpanels on a module's record view (for Sidecar modules) or detail view (for Legacy modules) depending on the relationship type. When you create a new relationship between two modules, the system automatically creates the necessary subpanels, related fields, and metadata relationships. Relationships provide the added benefit in reports to allow access to a related record's fields in addition to the base module's fields.

The relationships section in Studio allows administrators to create new relationships between custom and stock modules as well as change some properties on existing relationships. To access the Relationships section in Studio, select "Relationships" from the Modules panel and the module's relationship tab will open in the main panel.
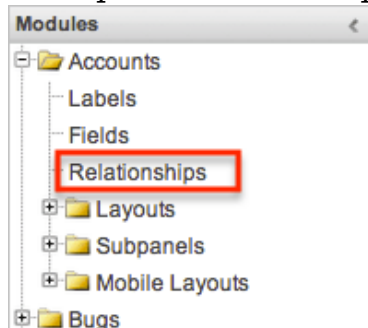
Relationship Types

Sugar contains a few different types of relationships you can create between modules. The relationship type will determine which fields or tables will be created in the database as well as what the interface will look like to the user when managing relationships for the affected records.

When you create a relationship between modules, the module you initiate the relationship from is considered the primary module and the module that you relate it to is the related module.

The following sections explain the relationship types available in Studio.

One-to-One Relationships

When records in the primary module and the related module are uniquely related to each other, you have a one-to-one relationship. In other words, each primary record will relate to only one related record and vice-versa.
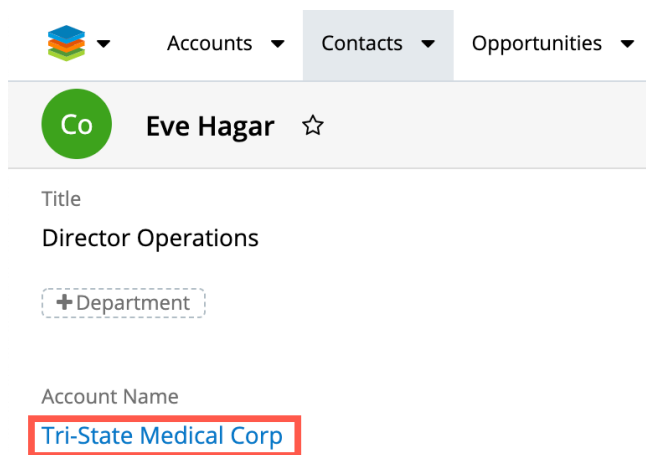
As an example, in a one-to-one relationship between Accounts and Contacts, an account can be associated with only one contact and a contact can be associated with only one account. The relationship will show as a field in each module's record view. For this two-way relationship, changing the related record from one module's record will also change the value in the other module's record.

- From the primary Accounts module:

- From the related Contacts module:

Note: You can alternatively create a one-way relationship between modules using relate fields. For more information regarding relate fields, refer to the Field Types section of this page. For an explanation of the differences between relate fields and relationships, see the Introduction to Relationships and Relate Fields article.

One-to-Many and Many-to-One Relationships

In one-to-many relationships, one primary record may relate to many records in the related module, but the related module records will only be able to relate to one primary record. This is often referred to as a parent-child(ren) relationship.

Note: Only modules with subpanels available can be on the "Many" side of a relationship. For example, the Product Catalog module lacks a subpanel; therefore, Product Catalog can only be selected on the "One" side of a relationship.

As an example, in a one-to-many relationship between Accounts and Contacts, an account can be associated with many contacts, but each contact can be associated with only one account. The record view of the primary module will display a subpanel for the related module, and the record view of the related module will display a field containing a link to the related record.

A one-to-many relationship is the same as a many-to-one relationship except the primary and related modules are reversed.

- From the primary Accounts module:

- From the related Contacts module:

You can also create a one-to-many relationship between a module and itself. For example, Sugar relates Accounts to Accounts in order to allow "Member Organization" sub-accounts within the primary "Member of" parent account.

Note: Adding a custom one-to-many relationship to "Activities" will add custom relationships to calls, meetings, notes, tasks, and emails. This will also automatically add these subpanels to the record view.

Many-to-Many Relationships

In many-to-many relationships, many primary records may be related to many related records, often overlapping. For example, the contact Joe Smith may relate to many different Sugar campaign records, and each of those campaign records

may relate to many contacts in addition to Joe Smith.

For a many-to-many relationship between Accounts and Contacts, an account could be associated with many contacts, and a contact, in turn, could be associated with many accounts. Both modules' record views would display a subpanel for the opposite module.

Note: Only modules with subpanels available can be on the "Many" side of a relationship. For example, the Product Catalog module lacks a subpanel; therefore, Product Catalog can only be selected on the "One" side of a relationship.

Creating Relationships

Use the following steps to create a new relationship via Studio:

1. Expand the tree under the desired module (e.g. Cases) in the Modules panel and select "Relationships".
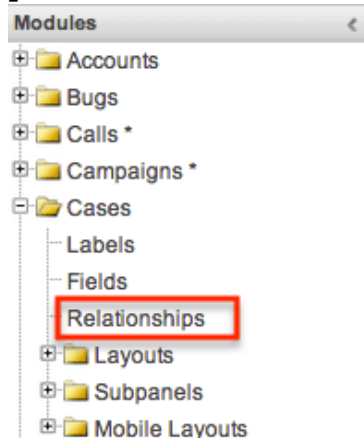
2. In the main panel, click "Add Relationship".
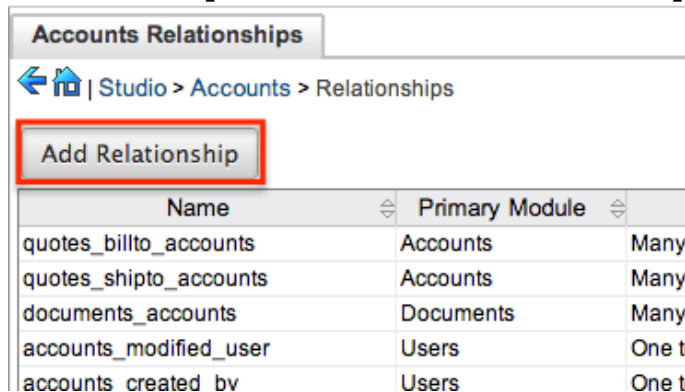
3. Enter appropriate values for the following options:
   Type: Select the type of relationship to create from the options in the Relationship Types section.
   Module: The Primary module is set as the module to which you are adding the relationship. Select the related module from the dropdown list to the

right. The Primary and Related module can be the same in order to create a parent-child relationship.

Label: Enter a label to reference the Primary module or Related module's subpanels for this relationship.

- ○ **Note**: This option is only available for the "Many" side of a relationship.

Subpanel from: Select a subpanel option to display the Primary or Related module's records in. This will determine the fields displayed in the subpanel.

- ○ **Note**: This option is only available for the "Many" side of a relationship.

4. Once the necessary information is entered, click "Save & Deploy".

5. The required fields and subpanels are instantly created and deployed to the appropriate modules.

Editing Relationships

Use the following steps to edit a relationship via Studio:

1. Expand out the tree under the desired module (e.g. Cases) in the Modules panel and select "Relationships".
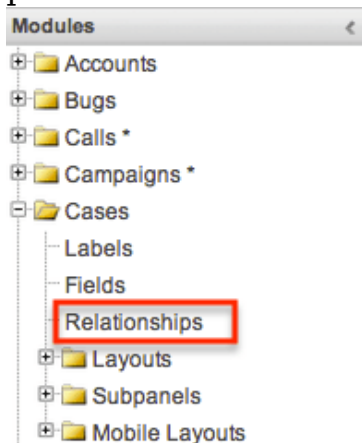
2. In the main panel, select a relationship to edit.
   - ○ Sorting the column header will help in locating the relationship faster.

- **Note**: Relationships created via Studio will display an asterisk next to their names.

3. The only editable field on a relationship is the Label field for naming the Primary or Related modules subpanels.
   - **Note**: This option is only available for the "Many" side of a relationship.
4. Once the necessary information for the Label field is entered, click "Save".

Deleting Relationships

Use the following steps to delete a relationship via Studio:

1. Expand out the tree under the desired module (e.g. Cases) in the Modules panel and select "Relationships".

2. In the main panel, select a relationship to delete.
   - Sorting the column header will help in locating the relationship faster.
   - **Note**: Relationships created via Studio will display an asterisk next to their names.

3. Select "Delete" to remove the relationship.

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

- **Note**: If you wish to retain the data and table structure that currently exists for the relationship, select the "Do Not Remove Tables" option. Leaving the "Do Not Remove Tables" unchecked will delete the relationship data and remove the tables for the relationship from the database.
- Before deleting a relationship please verify and resolve the following issues:
    - Relationship must be removed from any report filters or displays
    - Relationship must be removed from any workflows that filters or displays fields from the relationship
    - Relationship must be removed from any Sugar Logic formulas referencing the relationship

Alert ×

Are you sure you wish to delete this relationship?

☐ Do Not Remove Tables

Yes No
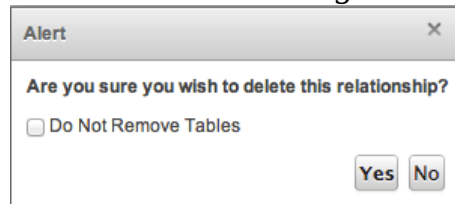
Layouts

The layouts in Studio are used to represent the various views (e.g. record view, list view, edit view, etc.) in Sugar. Users with administrator or developer access have the ability configure these layouts via Admin > Studio. Please note that the layouts available to configure will vary based on whether the module uses the Sidecar or Legacy user interface. All modules using the Legacy user interface will display an asterisk (*) to the right of the module's name in Studio. The available layouts for the selected module will appear once you open up the Layouts option.
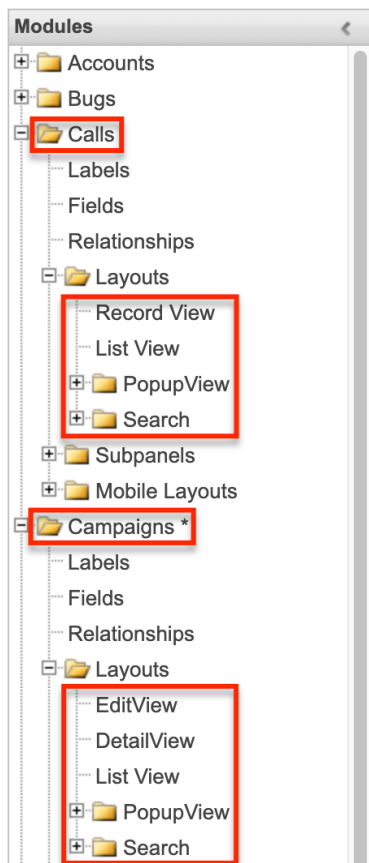
Layout Types

Sugar comes with different types of layouts to represent different sections of Sugar. Please note that not all layouts are available in every module.

The following layout options are available in Sugar:

- **Convert Lead**: The Convert Lead layout can be configured to mark modules as required for lead conversion, add or remove modules from the convert lead layout, etc. Please note that the Convert Lead layout is only available for the Leads module. For more information on modifying the Convert Lead layout, please refer to the [Editing Convert Lead Layout](#) section below.
- **Record View(for Sidecar modules)**: Record view is used to modify, create, or view the current record's details within a specified module. This layout is specific to modules using the Sidecar user interface and controls the layout for viewing, creating, and editing a record, as well as the quick-create layout and the fields displayed when the record is viewed via the preview pane.
- **Edit View (for Legacy modules)**: Edit view layout is used to modify or create records in the specified module.

- **Detail View(for Legacy modules)**: Detail view layout is used to view the current data for a record within the specified module.
- **List View**: List view layout is used to view multiple records within the specified module. The list view is also used for displaying the results from module search (for Sidecar modules), as well as Basic or Advanced search (for Legacy modules).
- **Preview View:** Preview view is used to display a read-only snapshot of records in the specified module.
- **Quick Create (for Legacy modules)**: Quick Create layout is used in Sugar to quickly view and modify records within a specified module without having to navigate away from the current page. For example, logging a call from the Quotes detail view will open up the call's quick create form.
- **Popup List View** : Pop-up list view layout is used to view a list of records in a pop-up window when selecting one or more records to relate to a current record.

- **Popup Search(for Legacy modules)**: Pop-up search layout allows users to search for records in the pop-up window to relate to a current record and appears above the pop-up list view in the same window. Legacy modules (e.g. Documents) use this layout for pop-up searching while Sidecar modules (e.g. Accounts) use the Search layout's configuration.

- **Search**: Search layout is used to allow users to search for records from a module's list view via module search (for Sidecar modules) or Basic and Advanced search (for Legacy modules). This layout is also used by Sidecar modules on the pop-up search and select. In addition, changes made to the Search layout for Sidecar modules affects the list of available fields to filter for the module's list view dashlet (e.g. My Contacts) since it is controlled by

the same layout as well.

Note: Encrypt fields cannot be added to Search layouts.

Layout Options
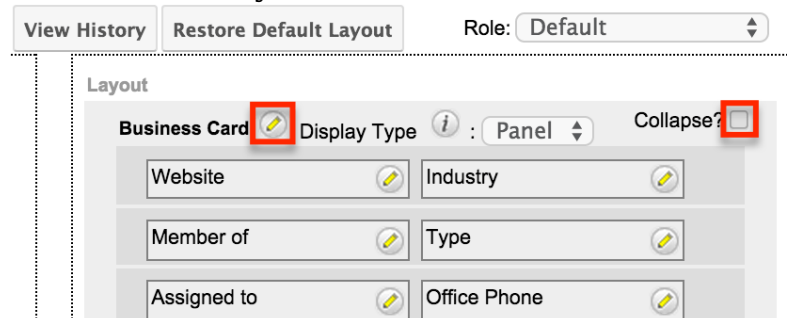
Administrators have the ability to configure the various layouts (e.g. record view, list view, etc.) available via Studio. The following are some of the options available to administrators when configuring layouts in Studio.

Panels

Every field on a layout is contained within a panel, which can be organized to contain groups of similar or related fields to assist in organization. Modules using the Legacy user interface will have fields grouped by default into the Overview and Other panels while modules using the Sidecar user interface will have the Business Card and Show More panels. You can change the panel header titles by clicking the Pencil icon to the right of the panel name.
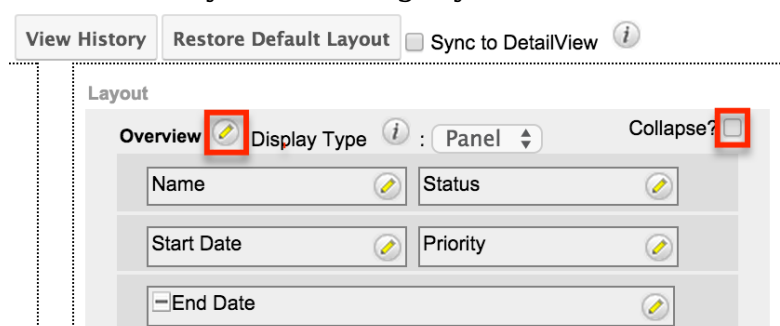
Note: You can have the panel collapsed by default on the Record View, Edit View, or Detail View by marking the Collapse? checkbox to the far right of the panel header.

Record View layout (for Sidecar modules):

Edit View layout (for Legacy modules):

Tabs

Each of the panels (Business Card, Overview, etc.) may optionally be displayed as tabs in the layout. You can also nest panels within other panels defined as tabs. For example, if you set the Business Card panel as a "Tab" and leave "Show More" as a panel in the Record View layout, the Show More panel will appear within the Business Card tab.
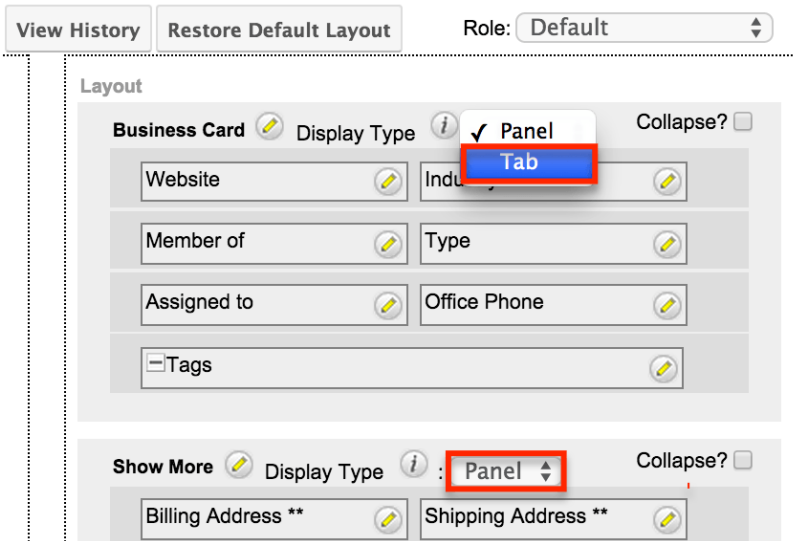
Every panel listed under a Tab display type will be a panel within the tab until the next Tab display type panel is reached. So if you add a new panel below "Show More" and set both the Business Card and Show More panel as "Tabs", then the newly added panel will appear within the Show More tab.

Restoring Layouts

Sugar keeps a history of the changes made to each layout. You can preview and restore historical layouts via "View History". For more information on viewing the history of layouts, please refer to the Viewing Layout History section of this documentation.

It is also possible to restore the Record View, Detail View, etc. layouts back to the default out-of-the-box layout. For more information on how to reset a layout to default, please refer to the Restoring Default Layouts section in this documentation.

Sync And Copy (Legacy Modules)

Sugar provides administrators with the ability to sync and copy certain layouts to assist in configuring layouts. Often it makes sense for a module's edit view and detail view layouts to be identical. Instead of having to duplicate any changes made to one layout, administrators can configure the detail view layout to be

synced to the edit view layout.

To sync the layouts, select the Sync to DetailView checkbox on the upper right of the EditView layout and click "Save & Deploy".

The current detail view layout will be replaced with the current edit view layout. At this point, changes cannot be made to the DetailView layout in Studio, but any changes made to the EditView layout will automatically be synced to the DetailView layout when saved.

As an alternative to syncing the layouts, administrators can copy the layout from the EditView to the DetailView or QuickCreate layouts. This is especially useful if you want the layouts to be similar, but different. Make any necessary changes to the EditView layout, then navigate to either the DetailView or QuickCreate layout. Select "Copy from EditView" to replace the current layout with details from the EditView layout. Once copied, you can continue to edit the DetailView layout as you wish.

Note: The copy feature is a one-time copy of the layouts. Any future changes to the EditView layout will not be reflected on the DetailView layout without performing the copy again.

Editing Layouts

You can add, remove, hide, etc. the fields for the available layouts in the module by selecting the specific layout under the Modules panel to edit. Please note that the List View, PopupView, and Search layouts have columns where you can designate fields users can and cannot see.

Note: Fields that are restricted to specific license types (e.g. Sugar Sell or Sugar Serve) can only be added to layouts by a user with the appropriate license type. If the field is already on a layout, users without the appropriate license type can remove it from the layout, but cannot re-add it. In addition, if a user does not have license access to a specific field, the field value is replaced with a pill containing the text "License Required". See the User Management documentation for an outline of what each license type includes.

Editing Record View Layout

The following steps cover editing the Record View layout for the Accounts module as an example:

1. Expand "Layouts" from the Modules panel under the Accounts module and select "Record View". The Record View layout will display in the main panel to the right.

2. To add a field to the Record View layout, drag the field from the list of fields in the Toolbox to a "(filler)" location on the layout per your preference.
   - You can also drag a field to a location on the layout that already has a field in place. The newly added field and the existing field on the layout will swap places.
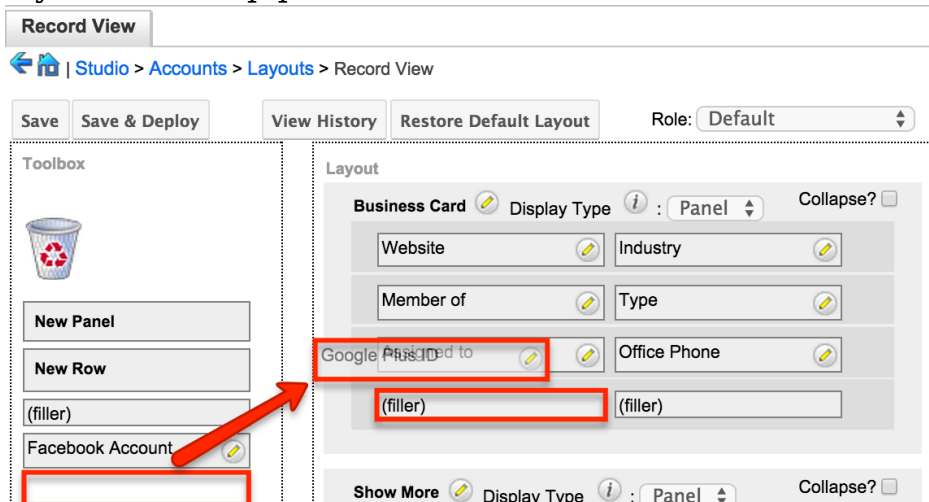
3. To remove a field from the layout, drag and drop the field from the layout to the trash bin in the toolbox to remove the field from the layout. You may remove an entire row in the layout using the same method.

4. To expand or minimize the field column in the layout, click the Plus icon (+) to stretch the field over two columns or click the Minus icon (-) to fit the field into one column. Some fields with content that can become long (e.g. Comment Log) are better suited to being displayed across two columns. **Note**: The layout will display a "(filler)" if there is no field in that location.
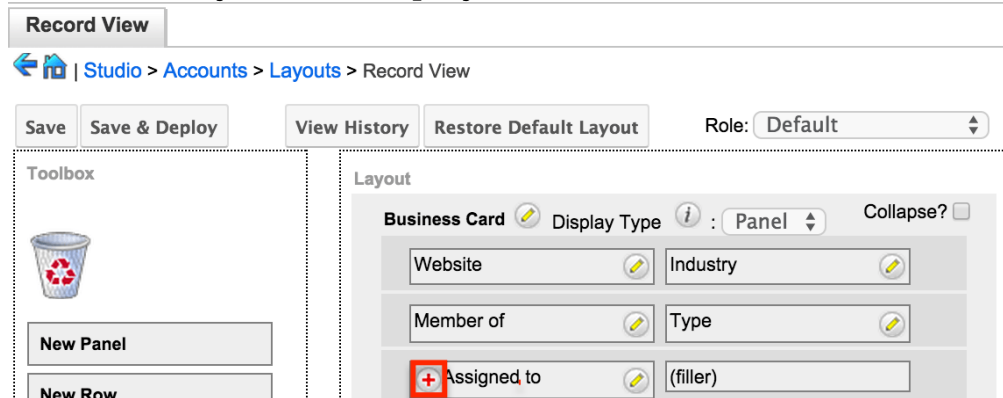
5. To add a new row, drag the "New Row" item in the Toolbox to the layout to allow additional fields or blank spaces to be added.
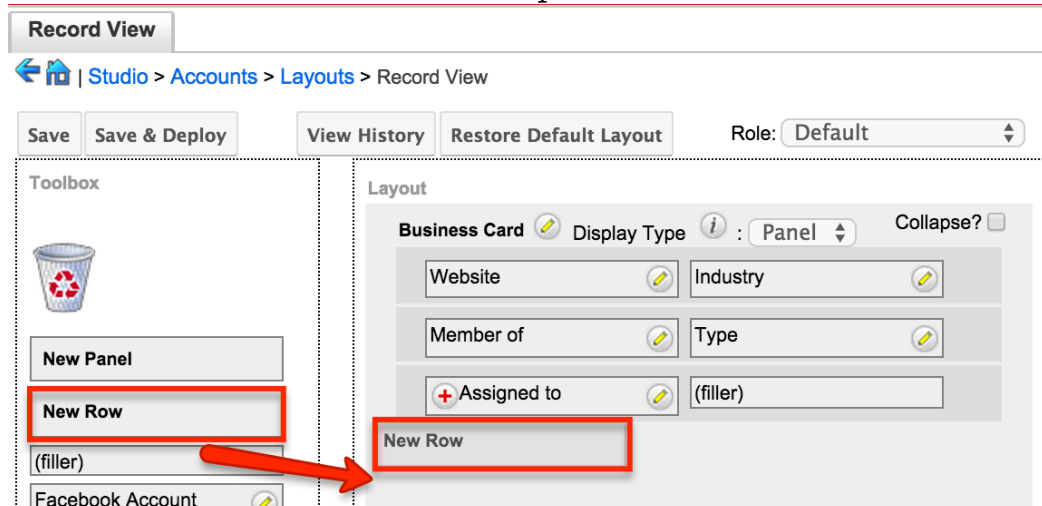
6. To add a new panel, drag the "New Panel" item in the Toolbox to the layout to group different sets of fields together in the Record View layout.
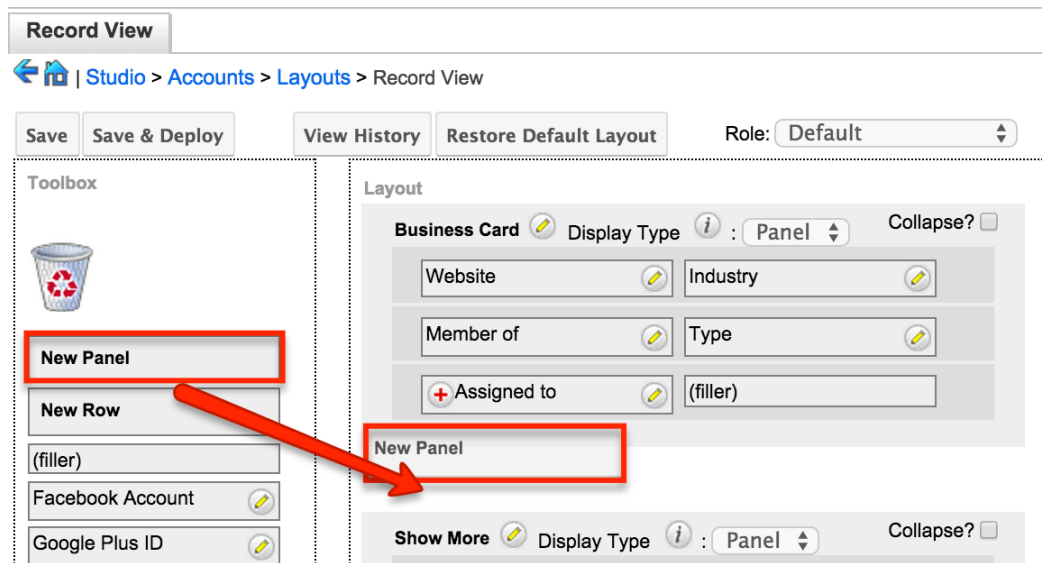
7. Once the layout is finalized, click "Save & Deploy" to preserve your changes and deploy immediately.
    ○ You can click "Save" if you wish to preserve the changes made but not deploy to Sugar's user interface.

Note: It is recommended that dependent fields be placed below and/or to the right of the independent field in order to preserve the correct display of fields on the layout.

Editing List View Layout

The List View layout has columns where you can define the fields that users can and cannot see. The List View layout also controls the list of available fields for the module's list view dashlet (e.g. My Contacts). Once the appropriate configurations are made in Studio, the deployed changes will be reflected in the Columns field of the corresponding module dashlet's Configuration Options page. Keep in mind that the module dashlet will not automatically reflect the Studio changes and users must edit the dashlet in order to view the changes, add new fields to the layout, etc.

To configure the List View layout, move the displayed fields among the Default, Available, and Hidden columns:
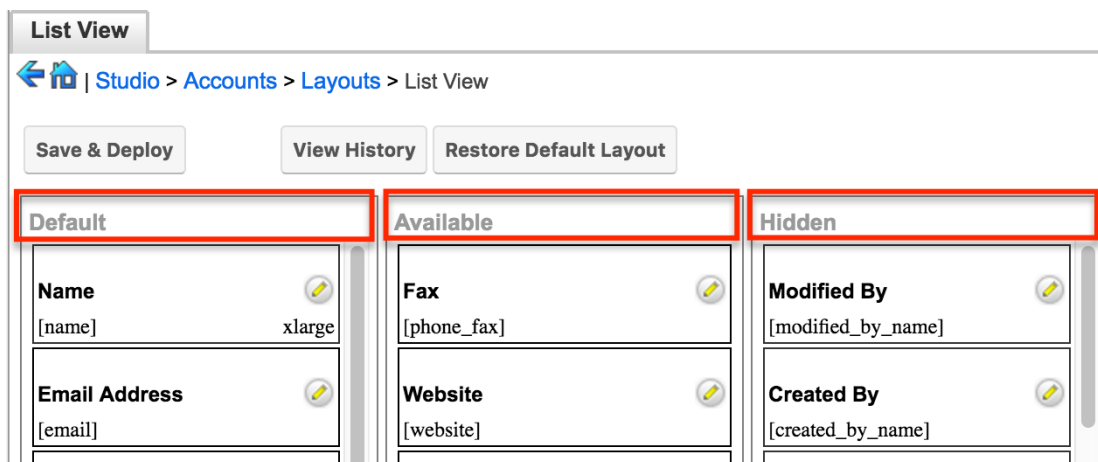
- **Default**: Drag fields into the Default column to display them on the default List view layout. The top-to-bottom order of fields corresponds with the left-to-right presentation of columns on the list view (or right-to-left for users viewing an RTL language). For example, the topmost field in the default column will be shown in the leftmost column of the list view.
- **Available**: Drag fields into the Available column to make them available for users to personalize their view of the layout without making them part of the default layout. Users will be able to click the Column Selection icon to see the list of available fields. For more information on working with columns in the list view, please refer to the [User Interface](#) documentation.
  - **Note**: Not all list-type layouts have an Available fields section.
- **Hidden**: Drag fields into the Hidden column to hide them from users in the list view. Hidden fields will be unavailable in list view regardless of a user's team or role settings, but they may still be available to users in other places such as in reports or the record view.

Note: To enable fields as filters in a Sidecar module's list view and list view dashlet (e.g. the "My Contacts" dashlet), please refer to the [Editing Search Layout](#) section.

The following steps cover editing the List View layout as an example:

1. Expand "Layouts" from the Modules panel under the Accounts module and select "List View".
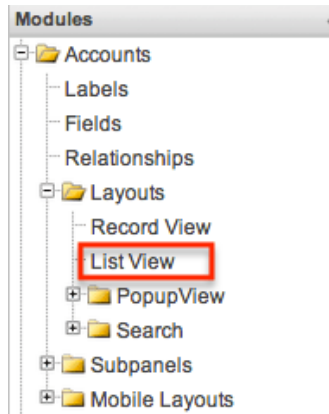
2. To add a field to the List View layout, drag and drop the fields from the Hidden column to the Default column.
    ◦ **Note**: The fields in the Default column will be available to add as display columns in the corresponding module dashlet (e.g. My Accounts).

3. To remove a field from the layout, drag and drop the field from the Default column to the Hidden column.
4. To change the left-to-right order of the fields displayed on the list view, drag and drop fields up or down within the Default list.
    ◦ **Note**: The order of fields designated for the List View layout also affects the order for the list of available fields in the corresponding module dashlet (e.g. My Accounts).
5. Optionally, modify the label and width for the field. Click the Pencil icon next to each field, enter the new label or select the width (e.g. small, medium, large), then click "Save". Changes to a field's label will affect all

List View layouts for this module. For more information on setting column widths, please refer to the [List View Column Widths](#) section.
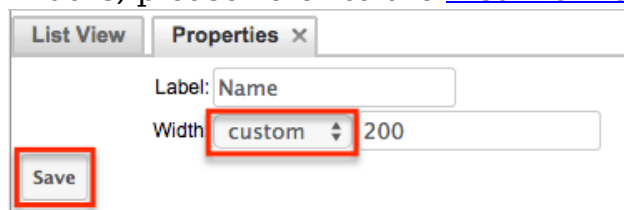
6. Click "Save & Deploy" to preserve your changes and deploy immediately.

List View Column Widths

Administrators can easily set the column widths for specific fields when configuring the List View layout. You can choose from a pre-defined list of width sizes (e.g. small, medium, large) that are available out-of-the-box with Sugar or enter a custom width value. The custom width value should be entered in pixels (e.g. 200) for Sidecar modules. Legacy modules should be entered as a percentage (e.g. 40) of the total width of the list view that should be dedicated to the column.

The following table describes the available column width sizes for fields in Sugar's list-view layouts. The Approximate Characters column indicates the maximum number of characters that the column will display before indicating overflow with an ellipsis. For example, a column size with an Approximate Characters value of 4 would display "University of Miami" as "Univ...". This number is an approximation due to the various widths of characters in the alphabet (e.g. a "w" character occupies more horizontal space than an "i" character). Users may expand the default column width manually or hover over the ellipses to reveal the field's entire contents.

Name	Width	Approximate Characters
xxsmall	20px	1
xsmall	40px	2
small	68px	8
medium	128px	15
large	180px	30
xlarge	280px	50
xxlarge	460px	85

Note: For currency fields, Sugar enforces a minimum 141px column width. Therefore, only the "large" setting and above will apply and custom values must be defined as 141 or wider.

Editing Search Layout

Note: After an administrator edits the Search layout for a module in Studio, users must edit or re-create their list view dashlets to see the deployed changes to their available filters or columns.

Editing Preview View Layout

The following steps cover editing the Preview View layout for the Accounts module as an example:

1. Expand "Layouts" from the Modules panel under the Accounts module and select "Preview View". The Preview View layout will display in the main panel to the right.
2. To add a field to the Preview View layout, drag the field from the list of fields in the Toolbox to a "(filler)" location on the layout per your preference.
    - You can also drag a field to a location on the layout that already has a field in place. The newly added field and the existing field on the layout will swap places.
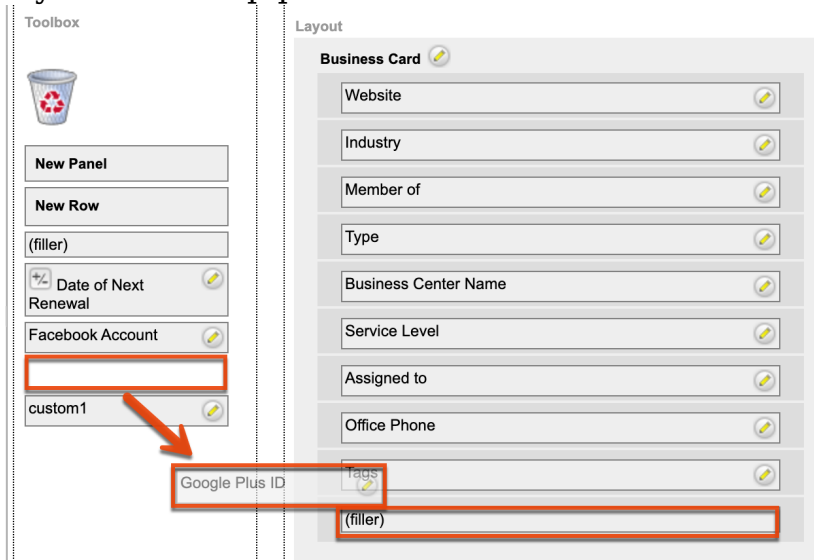
3. To remove a field from the layout, drag and drop the field from the layout to the trash bin in the toolbox to remove the field from the layout. You may remove an entire row in the layout using the same method.

4. To add a new row, drag the "New Row" item in the Toolbox to the layout to allow additional fields or blank spaces to be added.
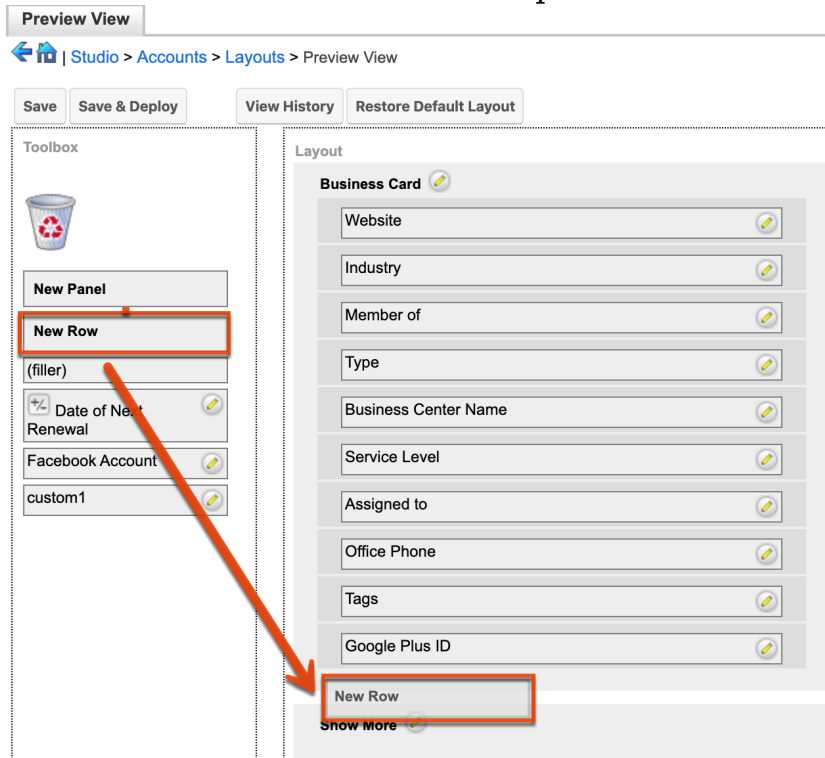
5. To add a new panel, drag the "New Panel" item in the Toolbox to the layout to group different sets of fields together in the Record View layout.
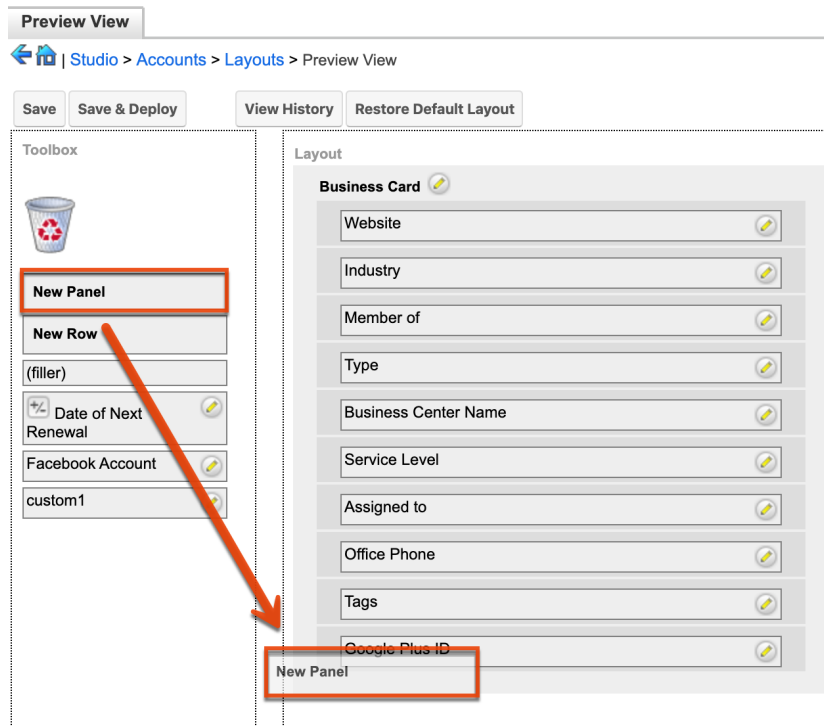
6. Once the layout is finalized, click "Save & Deploy" to preserve your changes and deploy immediately.
   - You can click "Save" if you wish to preserve the changes made but not deploy to Sugar's user interface.
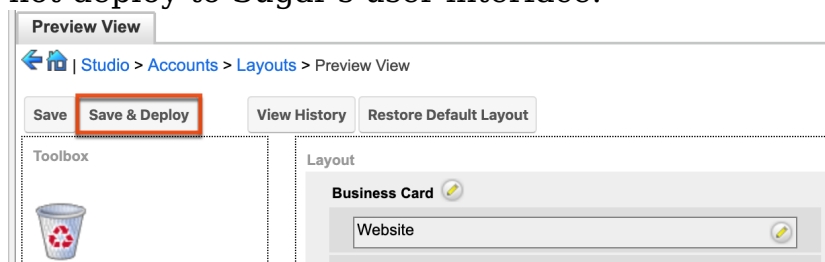
Editing Convert Lead Layout

The Convert Lead layout in Sugar is structured differently from the other layouts as it is specific to the lead conversion page for the Leads module. Administrators can configure which modules are available to convert, mark modules as required, add modules to the Convert Lead page, etc.
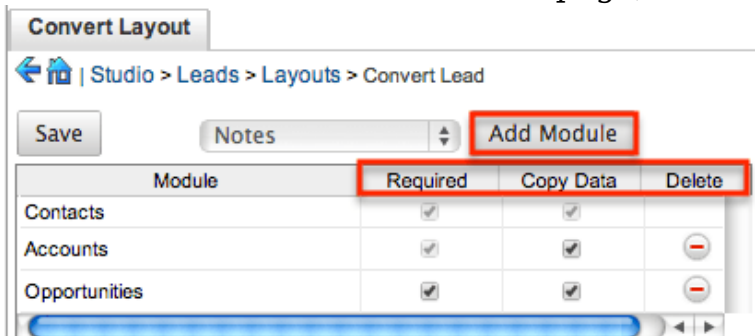
The following settings are available when configuring the Convert Lead layout:

- **Required**: Makes the module required during lead conversion. Required modules must be created or selected on the Convert Lead page in order for the lead to be converted and saved.
- **Copy Data**: Copies data from the Leads fields (stock and custom) to fields with the same name in the newly created record for the module.
  - **Note**: The field name and type must match between both modules (e.g. Leads and Accounts) in order for the data to copy over.
- **Delete**: Removes the module from the Convert Lead layout.

The following steps cover adding the Notes module to the Convert Lead layout:

1. Select the Notes module from the dropdown list above the convert lead table then click "Add Module".
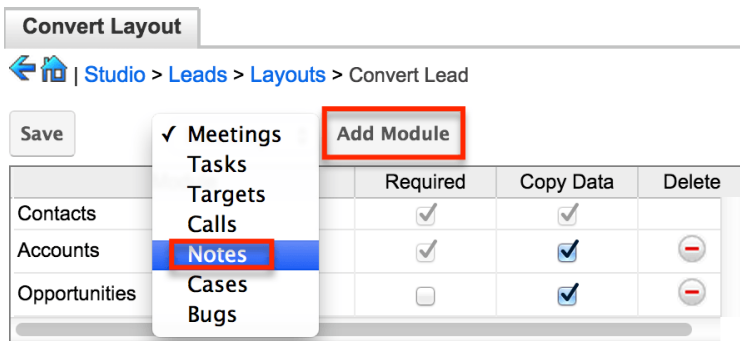
2. The Notes module will appear in the convert lead table and you can configure the settings as necessary. Click "Save" to preserve your changes.
   - **Note**: Modules added to the Convert Lead layout can be re-arranged by dragging and dropping the row (e.g. Notes) within the table. The Contacts, Accounts, and Opportunities modules cannot be re-arranged on the layout.
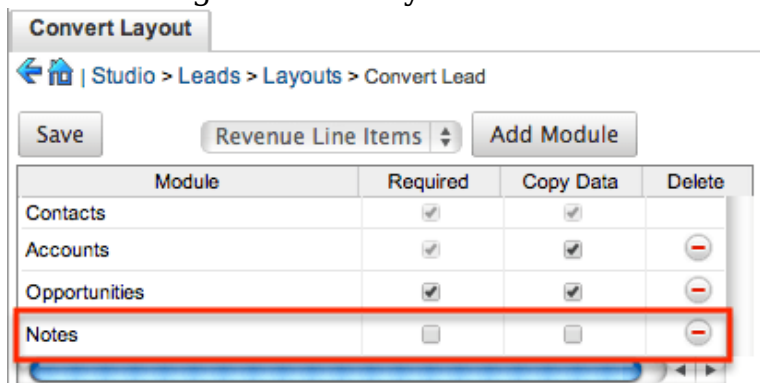
Subpanels

Related records between modules in Sugar are commonly displayed in Subpanels. Similar to list type layouts, administrators can modify the subpanel layouts to

change which fields are shown in a module's subpanel. You can add or remove fields for these subpanels depending on the information you want to be displayed to users. You can also rename a subpanel if needed. To access the subpanels section in Studio, expand "Subpanels" from the Modules panel under the desired module and the available subpanels will appear. Please note that the list of available subpanels for each module will vary.
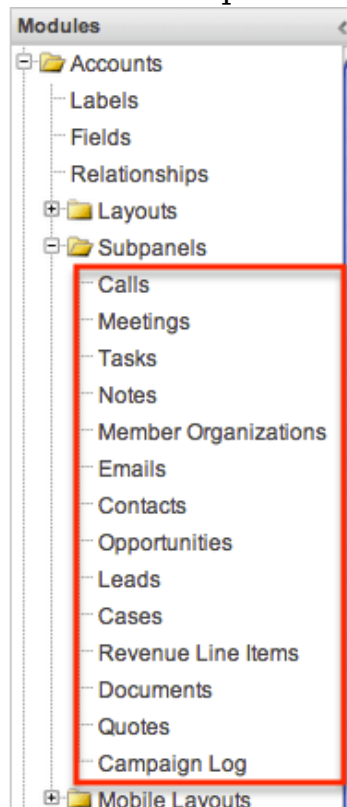
Subpanel Options

When configuring the Subpanel layout in Studio, there are options that allow you to change the subpanel title, view historical layout changes, as well as restore the default layout.

The following options are available when configuring subpanels in Studio:

- **Subpanel Title**: Sugar administrators have the option to modify the name of the subpanel. This will change the display value of the subpanel when viewing the record view (for Sidecar modules) or detail view (for Legacy modules) of a record from the specified module.
- **View History**: Sugar keeps a history of the changes made to each subpanel. You can preview and restore historical layouts via "View History". For more information on viewing the history of subpanels, please refer to the Viewing Layout History section of this documentation.
- **Restore Default Layout**: Restores the subpanel layout back to the default

out-of-the-box layout. For more information on how to reset a subpanel to the default layout, please refer to the [Restoring Default Layouts](#) section of this documentation.
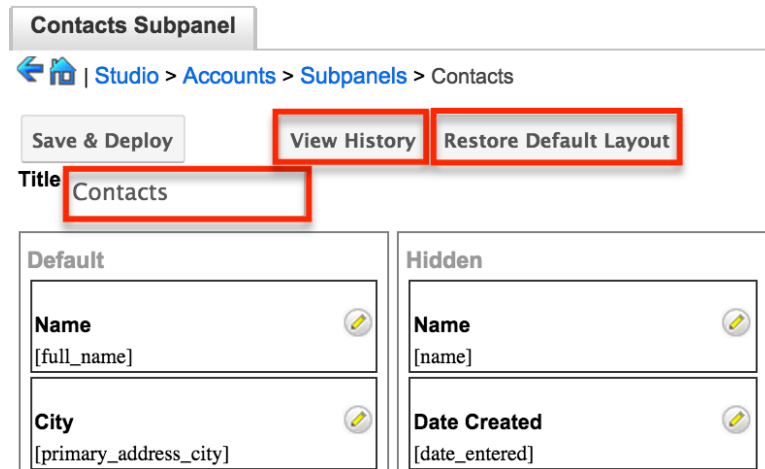
Editing Subpanels

The following steps cover editing the Notes subpanel for the Cases module as an example:

1. Expand "Subpanels" from the Modules panel under the Cases module and select "Notes". The Notes subpanel layout will display in the main panel to the right.
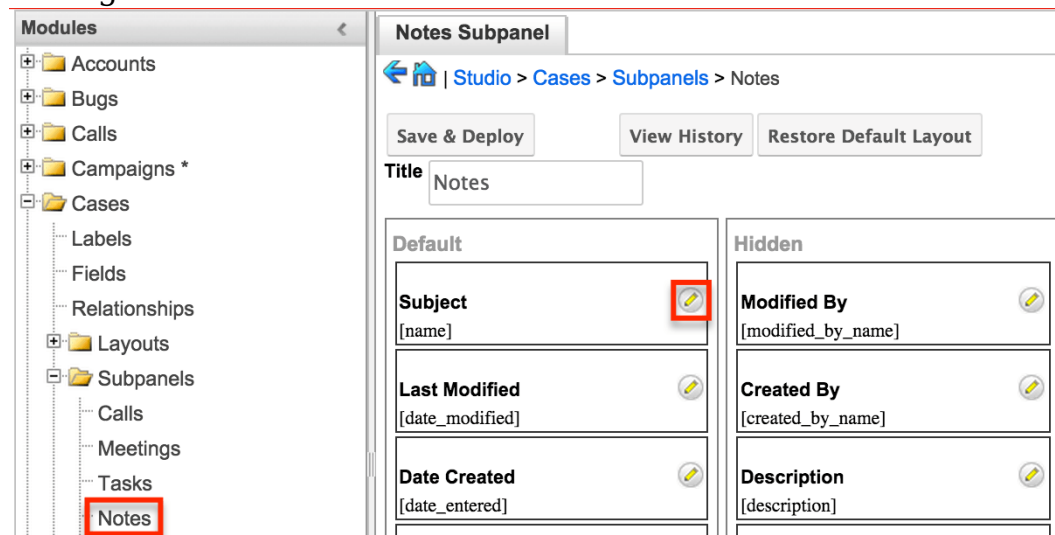
2. To add a field to the list of available column options within the Subpanel layout, drag and drop the fields from the Hidden column to the Default column. You can then drag the field up and down the list to change the position of the field in the subpanel.
    - **Note**: When in a module's Record View, individual users can select which available fields to display in each subpanel by clicking the Gear icon.

3. To remove a field, drag and drop the fields from the Default column to the Hidden column.

4. Click the Pencil icon to change the column width of the field in the subpanel.
    ◦ **Note**: Administrators can choose from a pre-defined list of width sizes (e.g. default, small, medium, etc.). Please note that selecting the Default width will set the list view column to equal the Medium width size. Selecting "custom" from the list will allow you to enter a custom width value in the open box. The custom width value should be entered in pixels (e.g. 200) for Sidecar modules. Legacy modules should be entered as a percentage (e.g. 40) of the total width of the list view that should be dedicated to the column.
    ◦ When defining the column width for currency fields (e.g. Likely, Best, etc.), only "large" and above applies because there is a

minimum width requirement in Sugar for this field type. In addition, when defining a custom width for currency fields, the value must be 141px or wider.
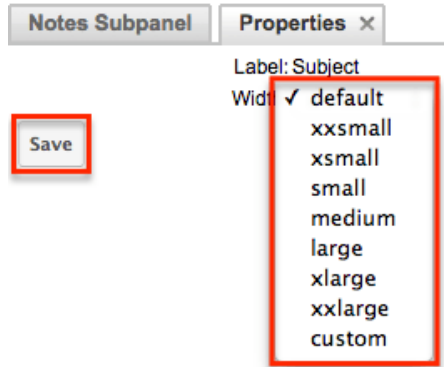
5. Click "Save & Deploy" to preserve your changes and deploy them immediately.

Mobile Layouts

Mobile layouts are used to represent the views in Sugar Mobile. The mobile layouts section in Studio allows administrators to add fields and configure the various mobile layouts. To access the mobile layouts section in Studio, expand "Mobile Layouts" from the Modules panel under the desired module. The available mobile layouts for the selected module will appear under "Mobile Layouts".

Mobile Layout Types

There are various mobile layouts in Sugar to represent the different areas of the Sugar Mobile application. Please note that not all layouts are available in every module and the different mobile applications will use the information defined here differently.

The following mobile layouts are available in Sugar:

- **Edit View**: Edit view layout is used to modify or create records in the specified module.
- **Detail View**: Detail view layout is used to view the current data for a record within the specified module. Certain fields are translated to Sugar Mobile as buttons instead of data. For example, instead of seeing the phone number, there is a phone icon to be able to call the number on the record.
- **List View**: List view layout is used to view multiple records within the specified module. The first eight fields in the Default column will be displayed in Sugar Mobile by default unless the user has customized their view.

Mobile Layout Options

Administrators have the ability to configure the various mobile layouts available via Studio.

The following options are available when configuring mobile layouts in Studio:

- **View History**: Sugar keeps a history of the changes made to each layout. You can preview and restore historical layouts via "View History". For more information on viewing the history of layouts, please refer to the Viewing Layout History section of this documentation.
- **Restore Default Layout** : Restores the mobile layout back to the default out-of-the-box layout. For more information on how to restore the default layout, please refer to the Restoring Default Layouts section in this documentation.

Editing Mobile Layouts

You can add, remove, hide, etc. the fields for the available layouts in "Mobile Layouts" by selecting the specific layout under the Modules panel to edit. Please note that the Mobile EditView and DetailView layouts are modified in similar fashions. The Mobile ListView layout has columns where you can designate fields users can and cannot see.

The following steps cover editing the Mobile EditView layout for the Cases module as an example:

1. Expand "Mobile Layouts" from the Modules panel under the Cases module and select "Mobile EditView". The Mobile EditView layout will display in the main panel to the right.
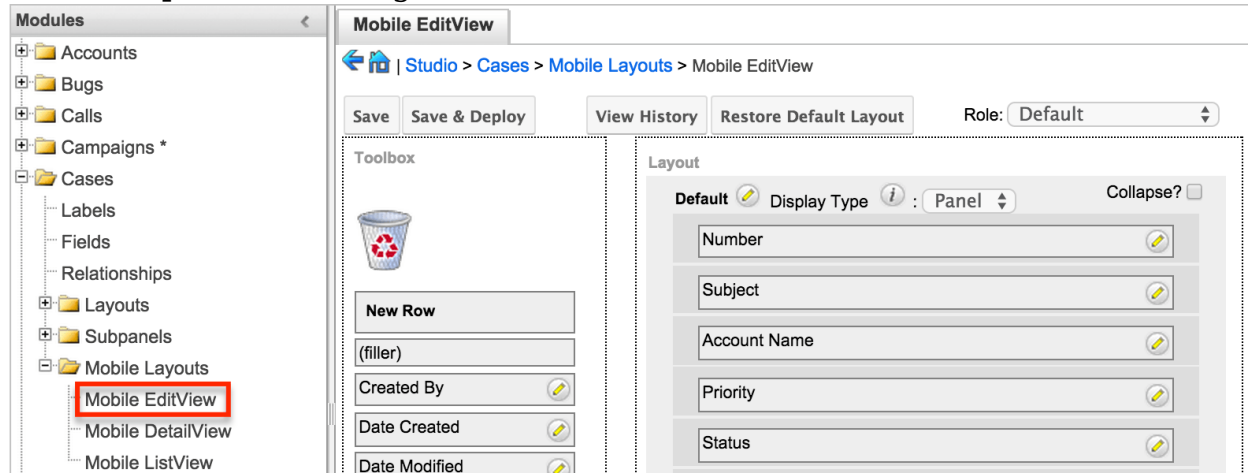
2. To add a field to the Mobile EditView layout, drag the field from the list of fields in the Toolbox to a "(filler)" location on the layout per your preference.
3. You can also drag a field to a location on the layout that already has a field in place. The newly added field and the existing field on the layout will swap places.
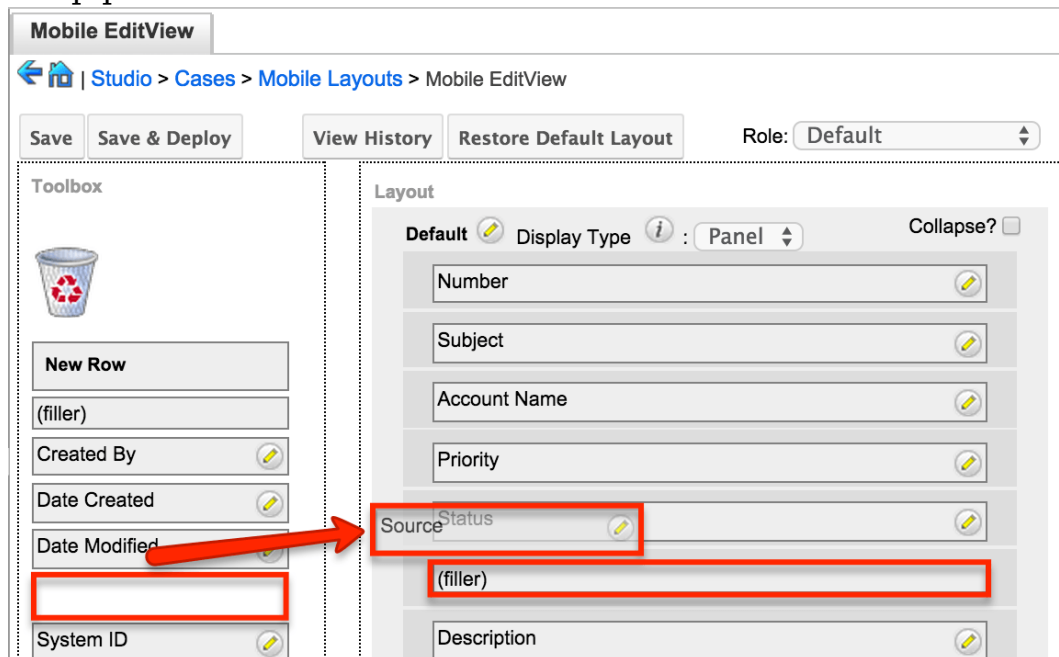
4. To remove a field from the layout, drag and drop the field from the layout to the trash bin in the Toolbox to remove the field from the layout. You may remove an entire row in the layout using the same method.
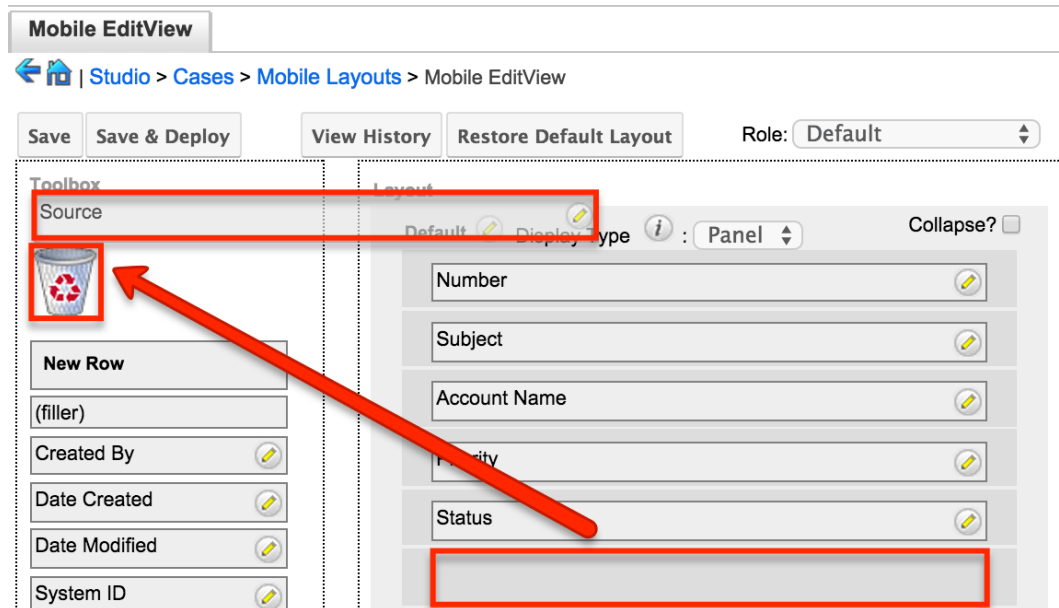
5. To add a new row, drag the "New Row" item in the Toolbox to the layout to allow additional fields or blank spaces to be added.
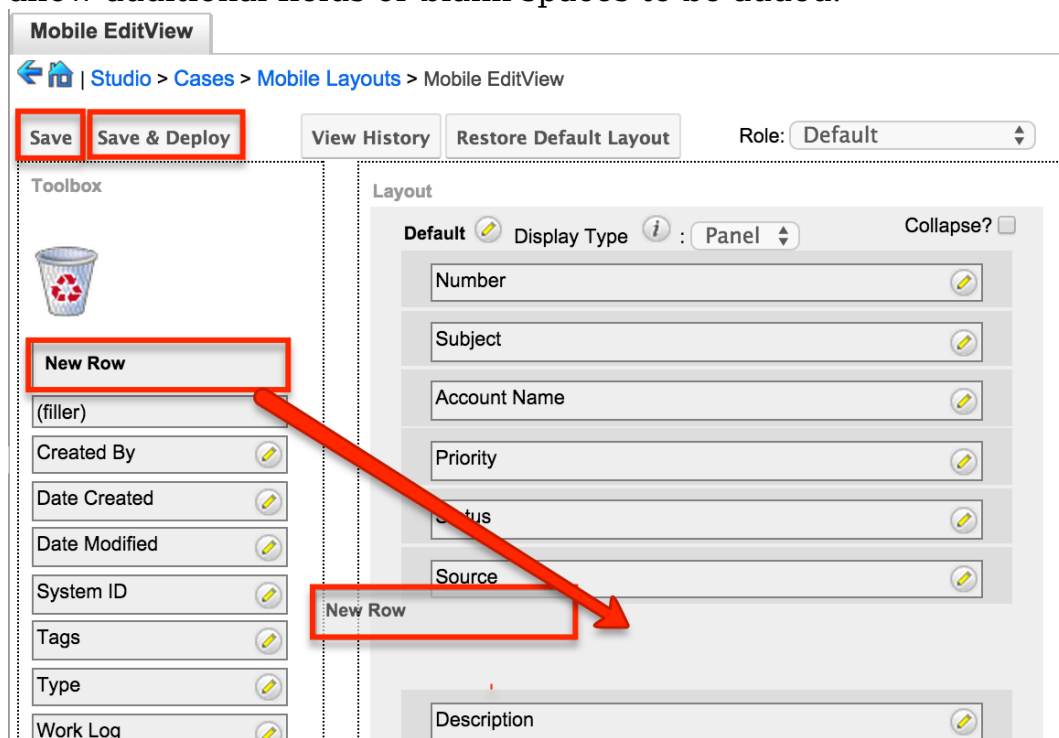
6. Once the layout is finalized, click "Save" to preserve your changes or "Save & Deploy" to preserve your changes and deploy them instantly.

Unlike the Mobile EditView layout, the Mobile ListView layout has columns where you can designate fields users can and cannot see. When configuring the Mobile ListView layout, you will see three columns (Default, Available, Hidden) where fields can be dragged and dropped accordingly.

- **Default**: This column contains fields that are displayed in the list view; the first eight fields are shown by default unless a user has customized their

list view for the module using the ListView Builder in Sugar Mobile. See the [Android](#) and [iOS](#) documentation for more details on List View Builder.

- **Available**: Available fields are fields that will not show by default in the layout, but if the layout can be personalized, users can add these fields to their view of the layout. Not all list type layouts have an available fields section.
- **Hidden**: This column contains fields that will not be displayed or available to be added to the list view by users.

The following steps cover editing the Mobile ListView layout as an example:

1. Expand "Layouts" from the Modules panel under the Cases module and select "Mobile List View".
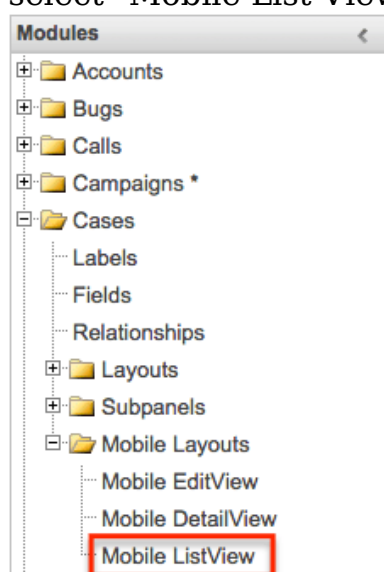
2. To add a field to the Mobile ListView layout, drag and drop the fields from the Hidden column to the Default column. The top eight fields will be displayed on the Cases list view if the user has not customized their list view at all using the ListView Builder in Sugar Mobile. See the [Android](#) and [iOS](#) documentation for more details on List View Builder.
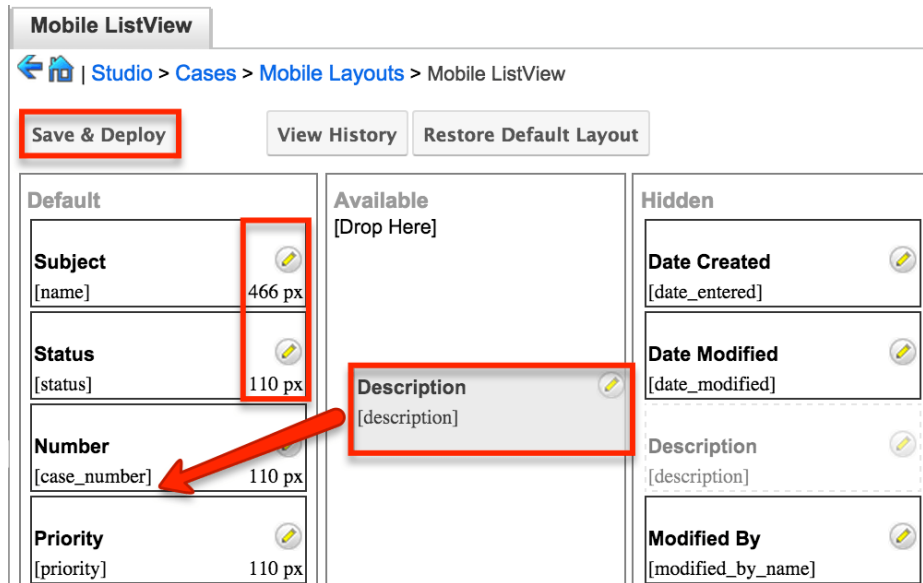
3. Click the Pencil icon to modify the label of the field as well as the width size the field will take up in the list view. Please note that the modified label will display in all ListView layouts.
4. Click "Save & Deploy" to preserve your changes and deploy immediately.

Using Sugar Logic

Sugar Logic allows administrators to write simple formulas and logic checks to provide a calculation for a field or to set the visibility of a field. For more information regarding the types of fields that you can use Sugar Logic with, please refer to the Field Options section of this documentation. A calculated field uses a formula to derive its value based on the values of other fields as well as mathematical or logical operators. A dependent field uses a formula to determine whether or not the field should be displayed. These formulas are automatically recalculated when the record is updated. In addition, when a record containing a formula's input field is updated, the formula is automatically recalculated.

Note: When creating a calculated formula for a Currency field, the currency symbol should not be used for a value (e.g. $100) in the formula. The formula should only define the numeric value (e.g. 100), as including the currency symbol will result in improperly calculated values.

When a calculated or dependent field is created or its formula is modified, all existing records in the module will not use the new formula until they have undergone a save action. To update the existing records to use the new formula, the module's list view includes a Recalculate Value action. Admin users or users with developer-level access can use this feature to cause existing records to recalculate affected fields without having to perform an update on each record individually. For more information, please refer to the User Interface documentation in the Application Guide.

Administrators can access the formula builder for the fields and options that accept formulas by selecting "Edit Formula".
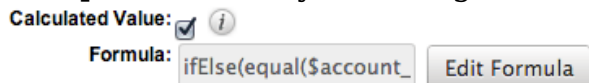
To browse all of the functions available, refer to the Complete List of Sugar Logic Functions section of this page. For more information and examples using Sugar Logic, please refer to the Sugar Logic section of the Knowledge Base, which includes articles covering the use of dependent and calculated fields. Topics range from introductory information to example Sugar Logic formulas and detailed walkthroughs of how to construct various fields and formulas in the formula builder.

Functions

Functions are listed on the lower left-hand corner of the formula builder and provide a variety of calculations, logic checks, and formatting options. To locate the function you need, simply scroll through the list or enter search criteria to narrow the list. Refer to the Complete List of Sugar Logic Functions section of this page to browse all of the available functions.
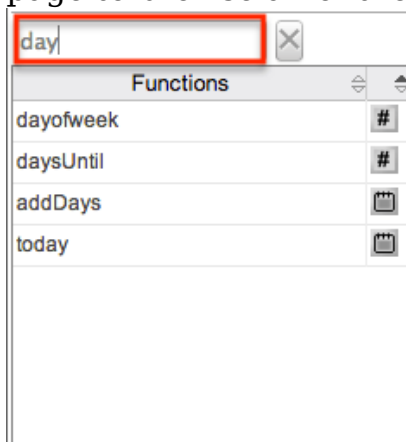
To see how to use a function, simply hover over the function to view the syntax, parameters, and a brief description of what the function does.
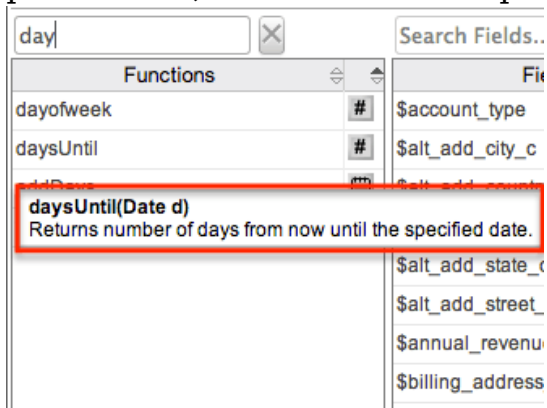
The function name is followed by a comma-separated list of parameters to the function. The list specifies the data type expected for each parameter. For example, the function "daysUntil" expects one parameter of Date type.

The description in the hover text will typically specify what data type is being returned, but if it does not, the symbol to the right of the function also represents the function's data type.
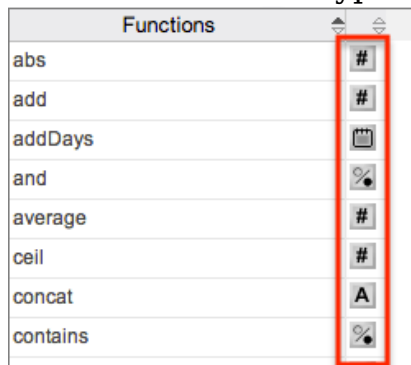
The following is a list of the possible return type symbols and the data types they return:

Symbol	Description
#	Returns a Number
Calendar	Returns a Date object with a date and time
%	Returns a Boolean (true or false) value
A	Returns Text
[ ]	Returns a List
?	Returns a variable data type that could be any of the above

Fields

Fields are listed on the lower right-hand corner of the formula builder and contain the fields for the current module. Fields can be referenced in formulas and will start with a $. To locate the field you need, simply scroll through the list or enter search criteria to narrow the list.
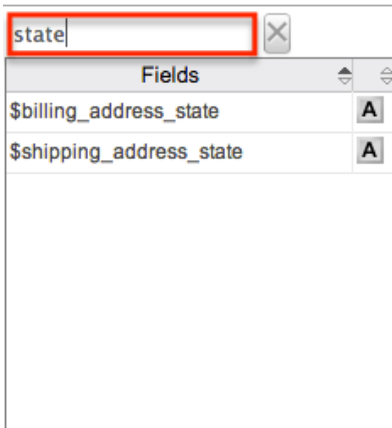
To add a field to the formula, simply click on the field to be added. The variable name for the field will be placed at the end of the formula. You can also type the variable names manually in the formula.

Related Field

Related fields are available to be added to formulas via the related function. You can manually add related function calls to your formula or you can build the syntax for the related function by clicking "Related Field".
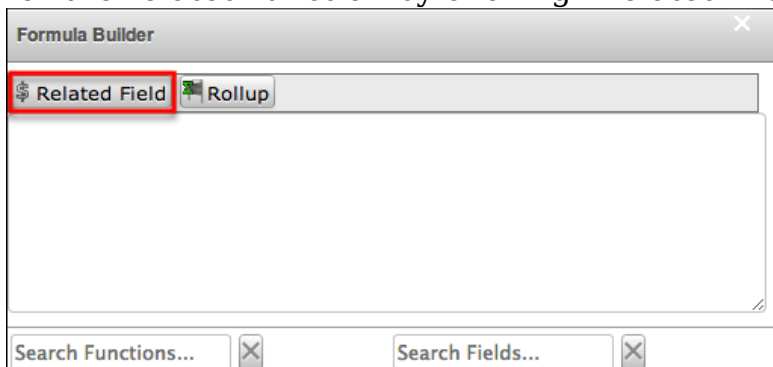
This will open a dialog box that will assist in building the syntax to use the related function. Select a module and a field within that module to pull the related field from and click "Insert".
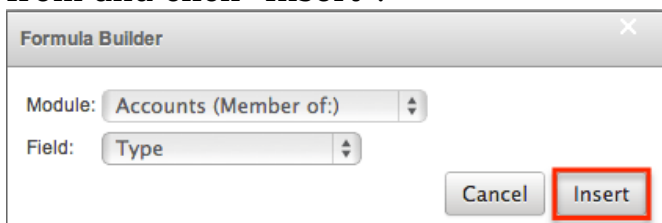
The resulting syntax for the selected options will be added to the formula.

Note: If a record has multiple related records to a module, the related function

will pull the field from one of the related records. It is not recommended to rely on the related function to pull the same related records for a many relationship.

Rollup

In addition to adding related fields, you can also add aggregate functions on related fields to formulas via the rollup functions. You can manually add rollup function calls to your formula or you can build the syntax for the rollup function by clicking "Rollup".
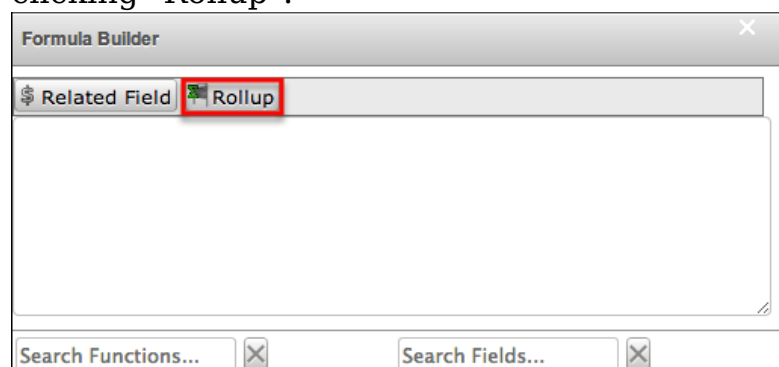
This will open a dialog box that will assist in building the syntax to use the rollup function. Select the type of rollup function (Sum, Average, Minimum, or Maximum) to perform on the module field. To perform a count of related records, please refer to the count function listed in the Functions section. Select a module and a field within that module to perform the rollup function on and click "Insert".
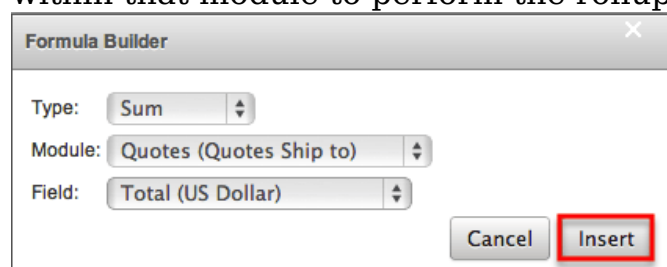
The resulting syntax for the selected options will be added to the formula.

Note: Rollup functions can only aggregate number type fields.

Complete List of Sugar Logic Functions

Some functions require a given number of parameters while others are more flexible. Most parameters require a specific data type to be passed in for the function to work. Functions with the same data type can be nested in a single formula.

The following functions and their parameters (multiple parameters are represented by "...") are available in Sugar:

Function	Description	Parameters	Return Type
abs	Returns the absolute value of $param1.	Number $param1	Number
add	Returns the sum of the given parameters.	Number $param1, ...	Number
addDays	Returns $date moved forward or backward by $days.	Date $date, Number $days	Date
and	Returns true if and only if all given parameters are true.	Boolean $param1, ...	Boolean
average	Returns the average of the given parameters.	Number $param1, ...	Number
ceil	Returns $param1 rounded up to the next integer.	Number $param1	Number
concat	Returns all of the given parameters appended together in the order passed.	String $param1, ...	Text
contains	Returns true if $needle is within $haystack.	String $haystack, String $needle	Boolean
count	Returns the number of records related to this record by $module	Relate $module	Number
countConditional	Returns the number of records related to this record by $link and that match the value of a specific field.	Relate $link, Field $string, Values $list	Number
createList	Returns a list of the given parameters.	Generic $param1, ...	List
date	Returns $param1	String $param1	Date

	as a Date object.		
dayofweek	Returns the number of the day of the week that $param1 falls on.	Date $param1	Number
dayofmonth	Returns the number of the day of the month as extracted from a date or datetime field.	Date $param1	Number
daysUntil	Returns the number of days from now until $param1.	Date $param1	Number
divide	Returns the $numerator divided by the $denominator.	Number $numerator, Number $denominator	Number
equal	Returns true if $param1 is equal to $param2.	Generic $param1, Generic $param2	Boolean
floor	Returns $param1 rounded down to the next integer.	Number $param1	Number
forecastIncludedCommitStages	Returns all the included commit stages for the Forecast module.		List
forecastSalesStages	Returns all the included sales stages for the Forecast module from the sales_stage_dom; If you pass in "false" for the $includeWon or $includeLost, those values will not be returned in the list.	Boolean $includeWon, Boolean $includeLost	List
getDropdownKeySe	Returns a List of	String $param1	List

t	the keys in the dropdown named $param1. This list must be defined in the Dropdown editor.		
getDropdownValue	Returns the value for the $key found in the dropdown named $list. This list must be defined in the Dropdown editor.	String $list, String $key	Text
getDropdownValueSet	Returns a List of the values in the dropdown named $param1. This list must be defined in the Dropdown editor.	String $param1	List
getListWhere	Returns the matched array from lists.	String $trigger, Enum $lists	List
greaterThan	Returns true if $param1 is greater than $param2.	Number $param1, Number $param2	Boolean
hoursUntil	Returns the number of hours from now until $param1.	Date $param1	Number
ifElse	Returns $return1 if $condition is true or $return2 if $condition is false.	Boolean $condition, Generic $return1, Generic $return2	Variable
indexOf	Returns the position of $needle in $haystack or -1 if $haystack does not contain $needle. The index starts at 0.	Generic $needle, List $haystack	Number
isAfter	Returns true if $param1 is after	Date $param1, Date $param2	Boolean

	$param2.		
isBefore	Returns true if $param1 is before $param2.	Date $param1, Date $param2	Boolean
isForecastClosed	Returns true if $status is in the forecast config for sales_stage_won or sales_stage_lost	String $status	Boolean
isForecastLost	Returns true if $status is in the forecast config for sales_stage_lost	String $status	Boolean
isForecastWon	Returns true if $status is in the forecast config for sales_stage_won	String $status	Boolean
isInList	Returns true if $item is contained within $list. $list can be a dropdown or multiselect field type.	Generic $item, List $list	Boolean
isValidDate	Returns true if $param1 is a valid date string.	String $param1	Boolean
isValidEmail	Returns true if $param1 is in a valid email address format.	String $param1	Boolean
isWithinRange	Returns true if $value is greater than or equal to $min and less than or equal to $max.	Number $value, Number $min, Number $max	Boolean
ln	Returns the natural log of $param1.	Number $param1	Number
log	Returns the $base Log of $value.	Number $value, Number $base	Number
max	Returns highest value of the given parameters.	Number $param1, …	Number

maxRelatedDate	Returns the highest value of $field in records related to $module.	Relate $module, String $field	Date
median	Returns the median of the given parameters.	Number $param1, ...	Number
min	Returns lowest value of the given parameters.	Number $param1, ...	Number
monthofyear	Returns the number of the month that $param1 is in.	Date $param1	Number
multiply	Returns the value of the given parameters multiplied together.	Number $param1, ...	Number
negate	Returns the negated value of $param1.	Number $param1	Number
not	Returns true if $param1 is false, and false if $param1 is true.	Boolean $param1	Boolean
now	Returns a Date object representing todays date and the current time.		Date
number	Returns the numeric value of $param1.	String $param1	Number
or	Returns true if any given parameters are true.	Boolean $param1, ...	Boolean
pow	Returns the $value raised to the power of $exponent.	Number $value, Number $exponent	Number
prorateValue	Returns the $baseValue prorated using $dv1 and $du1 as	Number $baseValue, Number $dv1, String $du1,	Number

		Number $dv2, String $du2	
related	Returns the value of $field in the related $module.	Relate $module, String $field	Variable
rollupAve	Returns the average value of $field in records related to $module.	Relate $module, String $field	Number
rollupConditionalSum	Returns the sum of the values of $field in records related by $link where $conditionField contains something from $conditionalValues.	Relate $link, String $field, String $conditionField, List $conditionalValues	Number
rollupMax	Returns the highest value of $field in records related to $module.	Relate $module, String $field	Number
rollupMin	Returns the lowest value of $field in records related to $module.	Relate $module, String $field	Number
rollupSum	Returns the sum of the values of $field in records related to $module.	Relate $module, String $field	Number
strlen	Returns the number of characters in $param1.	String $param1	Number
strReplace	Returns modified $subject after	String $search, String $replace,	Text

	replacing occurrences of $search within $subject string with the value specified by $replace. Include true as the fourth argument to make the search case-sensitive.	String $subject, Boolean $case-sensitive (optional)	
strToLower	Returns $param1 converted to lower case.	String $param1	Text
strToUpper	Returns $param1 converted to upper case.	String $param1	Text
subStr	Returns the portion of $value specified by $start and $length. The position starts at 0.	String $value, Number $start, Number $length	Text
subtract	Returns $param1 minus $param2.	Number $param1, Number $param2	Number
timestamp	Returns the passed in datetime string as a unix timestamp.		Date
today	Returns a Date object representing todays date.		Date
toString	Returns $param1 converted to a string.	Generic $param1	Text
translateLabel	Returns the translated value of $label for $module.	String $label, String $module	Text
valueAt	Returns the value at position $index in $haystack.	Number $index, List $haystack	Variable
year	Returns the year portion of $param1 in YYYY format.	Date $param1	Number

Viewing Layout History

Layouts, subpanels, and mobile layouts in Studio keep a history of the last ten changes made to the specific layout. To view the history for any of these layouts, simply select "View History" from the Record View (for Sidecar modules), List View, Edit View (for Legacy modules), etc. layout in Admin > Studio.

The following steps cover viewing the layout history for the Record View layout as an example:

1. Navigate to the [Record View](#) layout in Admin > Studio.
2. Click the View History button on the upper left of the layout editor.
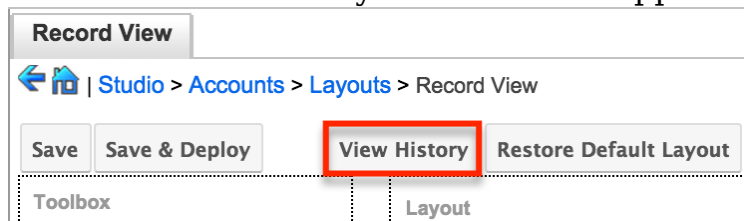
3. The History dialog box will appear showing the timestamps of the last ten saves to the selected layout.
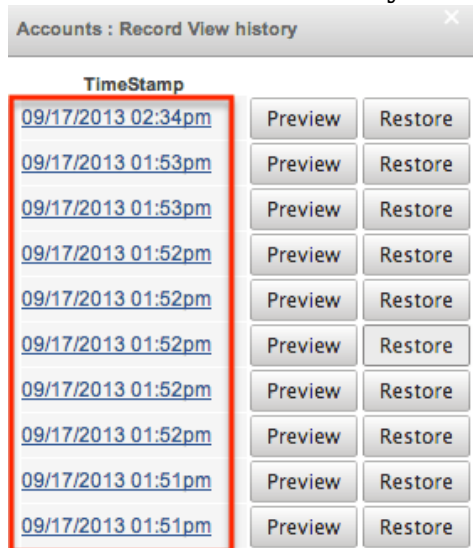
4. Click the timestamp or Preview button and a preview of the modified layout will appear in a new tab of the main layout panel.
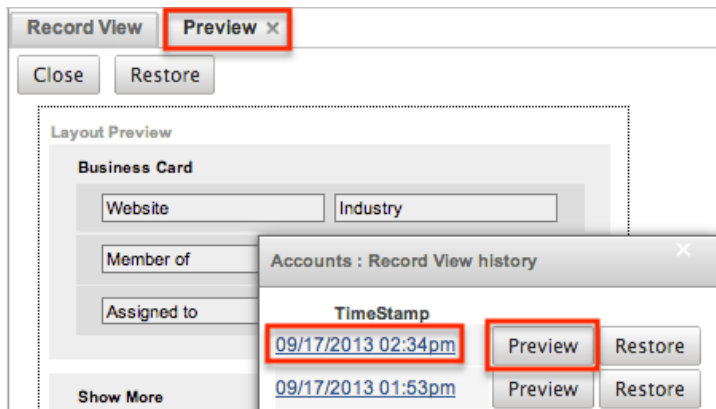
5. To restore a specific layout per the history, click the Restore button within the Preview layout or from the History dialog box.
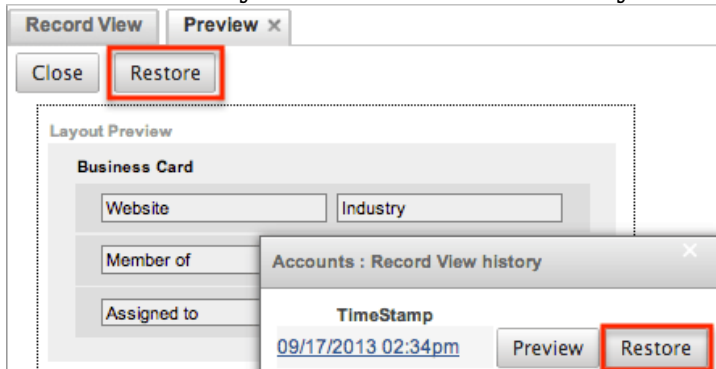
The chosen Record View layout will load into the editor and you may make appropriate changes to the layout as you wish. Click "Save" to preserve your changes or "Save & Deploy" to preserve your changes and deploy immediately.

Restoring Default Layouts

Various layouts in Studio can be restored back to the default out-of-the-box configuration, which will revert all changes made to the specific layout (e.g. list view, record view, etc.). To restore the default layout, simply click the Restore Default Layout button from the Record View (for Sidecar modules), List View, Edit View (for Legacy modules), etc. layout in Admin > Studio.

From Record View layout (for Sidecar modules):
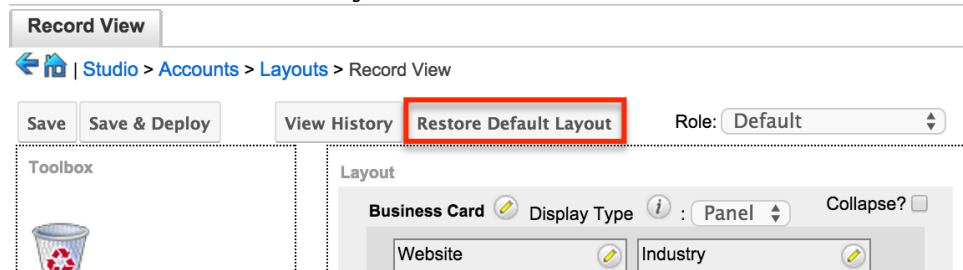
From Edit View layout (for Legacy modules):
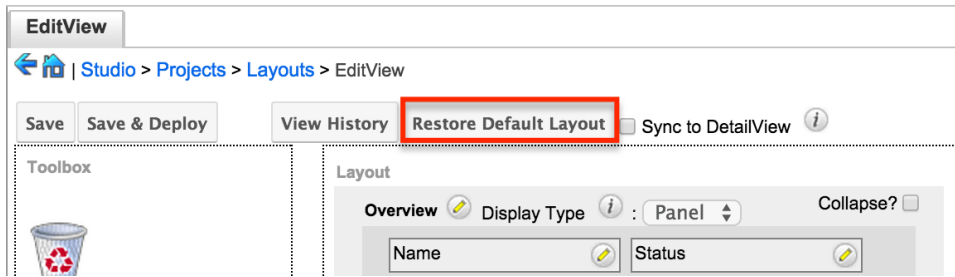
The default layout will load into the editor and you may make appropriate changes to the layout as you wish. Click "Save" to preserve your changes or "Save & Deploy" to preserve your changes and deploy them immediately.

Resetting Modules

Sugar comes with the ability to reset an entire module back to the default settings. You can also pick and choose which customizations you would like to remove. To reset a module, select the module from the Modules Panel and click "Reset Module" in the Main Panel.
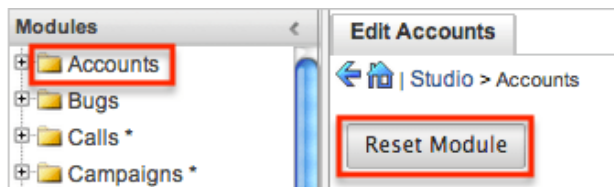
The next screen will give you the following options to remove specific customizations:

- **Clear Relationships**: Deletes all relationships added via Studio.
- **Remove Custom Fields**: Deletes all fields added via Studio.
- **Reset Layouts**: Resets the layouts back to the out-of-the-box configuration. You will need to click "Save & Deploy" on edit view and detail view layouts to be able to access the layouts.
- **Reset Labels**: Deletes the custom language files located in ./custom/modules/{Module Name}/language/ which sets the labels for the module.
- **Clear Extensions**: Deletes any customizations made to stock or custom fields and sets them back to the default. Deletes the module folder located in ./custom/Extension/modules/.

Select the desired options and click "Reset" to execute the reset.
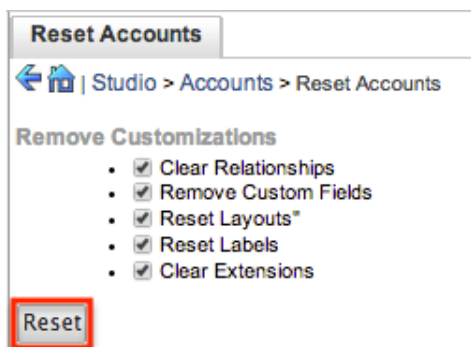
Exporting Customizations

Sugar allows you to export a module's customized layouts, fields, and field labels from one Sugar instance to import into another Sugar instance. To do this, you will need to package the customizations in Studio, export it to your local machine, and then upload it into another Sugar instance. The system applies the customizations to the appropriate layouts, fields, and field labels.

Note: Safari users will need to change the default browser setting to disable automatic unzipping of files to ensure that exported packages install properly in Sugar. Navigate to Safari > Preferences > General and uncheck "Open 'safe' files after downloading" to disable the setting.

Use the following steps to export your customizations via Studio:

1. From the Studio home page, select "Export Customizations" in the main panel.
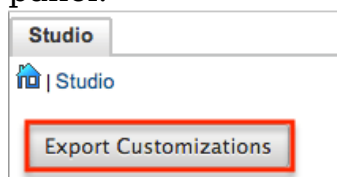
2. Enter appropriate values in the following fields. All required fields are marked with a red asterisk and must be completed prior to saving.

- **Package Name**: Enter the name of the package to be displayed during installation.
- **Author**: Enter the name of the author creating the package to be displayed during installation.
- **Description**: Enter a description of the export to be displayed during installation.
- Select at least one module to include in the customization export and click "Export".

- The customizations are saved to your computer in a zip file that can be loaded into a different instance of Sugar via the module loader. For more information regarding installing packages, please refer to the Module Loader documentation.

Last Modified: 2021-07-16 19:09:33

Module Builder

Overview

Module Builder enables administrators to create, deploy, and maintain custom modules in Sugar. Modules can be created in Module Builder and then deployed within your instance of Sugar or exported for additional development and deployment to other instances of Sugar. This is convenient for testing new modules and for distributing a module to many different instances. Please note that only users with administrator or developer access can create and manage custom modules via Admin > Module Builder. This documentation will cover how to use Module Builder as well as the various actions and options available from within Module Builder.

Navigation

Sugar's Module Builder is divided into three main sections which consist of the main panel, packages panel, and footer. You can easily create, access, and manage

the custom modules via the main panel and Packages panel. The footer of Module Builder allows you to access different areas (e.g. Studio, Dropdown Editor) of the Developer Tools section by clicking the corresponding buttons at the bottom of the page.

Main Panel

The main panel in Module Builder is where you can create a new package, access existing packages, deploy a package, etc. As you create and configure the module(s) within the package, the various sections (e.g. layouts, fields, etc.) you access will open inside tabs on the main panel. Additional tabs that open up can be closed by clicking the "X" within the tab.
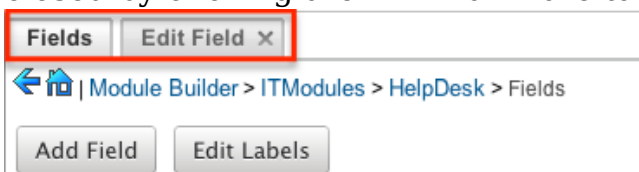
The main panel also displays the breadcrumbs bar showing where in Module Builder you currently are. You can navigate to a specific section by clicking the link within the breadcrumb bar.
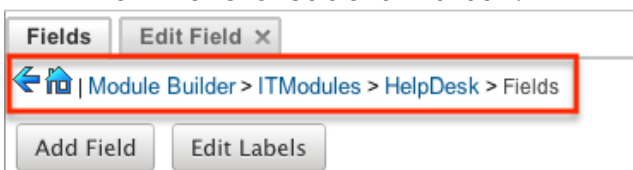
To go back to the previous page you were viewing, click the Left arrow on the breadcrumbs bar. Clicking the Home icon will navigate you back to the Developer Tools home page.

Packages Panel

The Packages panel is located to the left of the main panel and displays a list of existing packages and associated custom modules that are accessible via Module Builder. The custom modules are grouped under a package and the fields, layouts, subpanels, etc. specific to each module appear when you expand out the tree for the module.
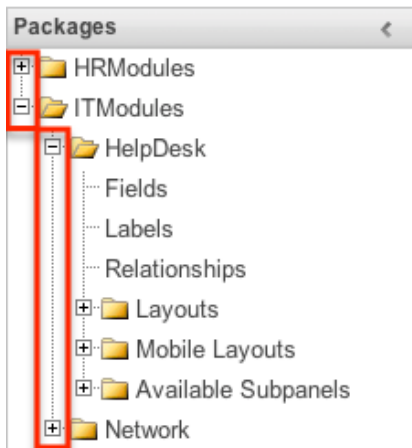
Select an item in the Packages panel to load it into the main panel. Please note that i f you do not see the Packages panel, it may be collapsed. Simply locate the gray bar to the left of the main panel and click the Right arrow to expand the Packages panel.
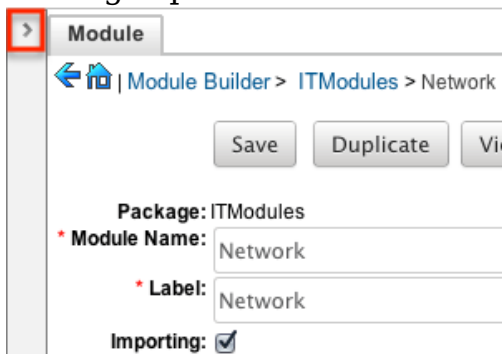
Footer

The footer is located on the bottom left of Module Builder and displays buttons which enable you to navigate to the different areas (Studio, Dropdown Editor, etc.) of Developer Tools.
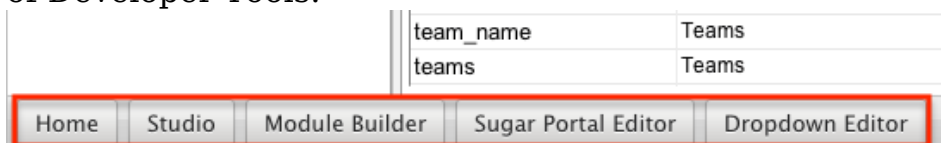
The options in the footer allow you to navigate to the following locations:

Menu Item	Description
Home	Navigates to the home page of Developer Tools
Studio	Navigates to the home page of Studio
Module Builder	Opens Module Builder to create and manage custom modules

[Dropdown Editor](#)	Opens the Dropdown Editor to create and edit dropdown lists

Packages

Packages in Module Builder allow you to create and house multiple modules of different types. Please note that a package must first be created in order to create a custom module via Module Builder. While packages can be useful to group similar or dependent modules together to ensure they are deployed together, it is generally recommended that a separate package be created for each module. This can help prevent potential issues down the road since if you ever need to uninstall a module and it is part of a larger package, then all modules in that package must be uninstalled. Keeping modules isolated to their own package allows greater flexibility in the future if a module is no longer needed.

Creating Packages

Use the following steps to create a new package via Module Builder:

1. Navigate to the Module Builder's main panel and click "New Package".
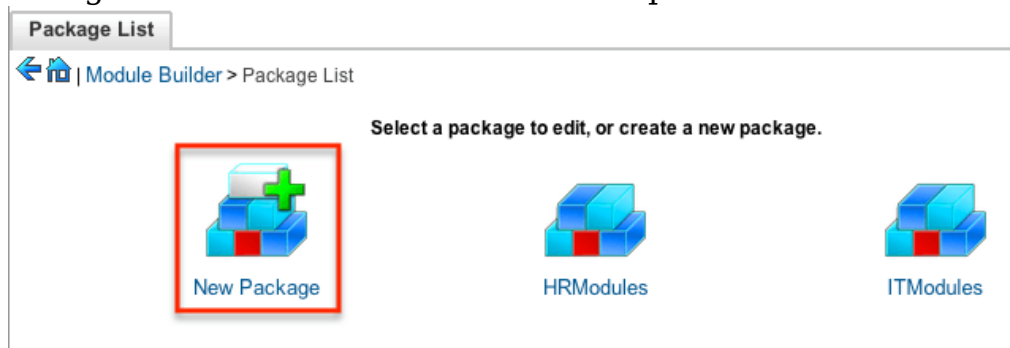
2. Enter appropriate values for the following fields:
   - **Package Name** : The name or designation of the package. The package name is what displays in the Packages panel and in Module Loader when installing packages.
   - **Author** : The author who is creating the package. The author displays in Module Loader when installing packages.
   - **Key** : The key is an alphanumeric text to distinguish modules with similar names. The system will prefix all class names, directories, and table names with this key.
   - **Description** : A description or other information about the package.
   - **Readme** : Click "Readme" to display an open text box where you can enter additional information about the package or modules

contained in the package.
- **Note**: 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".

Deploying Packages

Once the package is created and saved, you can create custom modules by clicking the New Module icon. Please note that the package must contain at least one module in order to properly publish and deploy the package, as well as export the customizations. There are various options (e.g. deploy, publish, export, etc.) available when viewing the package which allow you to perform various actions.

The Package options allow you to perform the following operations:

Action	Description
Save	Click "Save" to preserve any changes

	made to the Package details (Package Name, Author, etc.).
Deploy	Installs the package into the current instance. Any modules in the package will be created or updated in the current instance. **Note**: Do not re-deploy a package once deployed from Module Builder as any workflows, code-level customizations, or changes made through Studio for the custom modules will be lost. It is recommended that module packages be deleted from Module Builder after a successful deploy to avoid an accidental re-deploy. Please use Studio to perform any additional configurations to your module once deployed.
Publish	Saves the package into an installable zip file containing all customizations. Upload the file via Module Loader to install the package into a different instance. **Note**: Packages developed on Sugar Professional can only be installed on instances running the same version of Sugar Professional.
Export	Saves the package into an importable zip file containing all customizations. Upload the file via Module Loader to view the package in Module Builder on a different instance where it can then be further developed and deployed. **Note**: Packages developed on Sugar Professional can only be installed on instances running the same version of Sugar Professional.

Deleting Packages

If a package is invalid or should no longer appear in your organization's Sugar

instance, it may be deleted from Module Builder. Please note that deleting a package will delete all files contained in the package, but will not remove the package from any instance where the package was deployed. For more information on how to uninstall a deployed package from an instance, please refer to the Module Loader documentation in the Administration guide.

Note: We recommend deleting packages from Module Builder after they have been deployed in a production instance to prevent it from accidentally being re-deployed. The only exception to this rule is in a development environment as you may want to continue working and testing until you are ready to move the module to your production environment.

Use the following steps to delete a package via Module Builder:

1. Select the desired package from either the Packages panel or from the main panel.
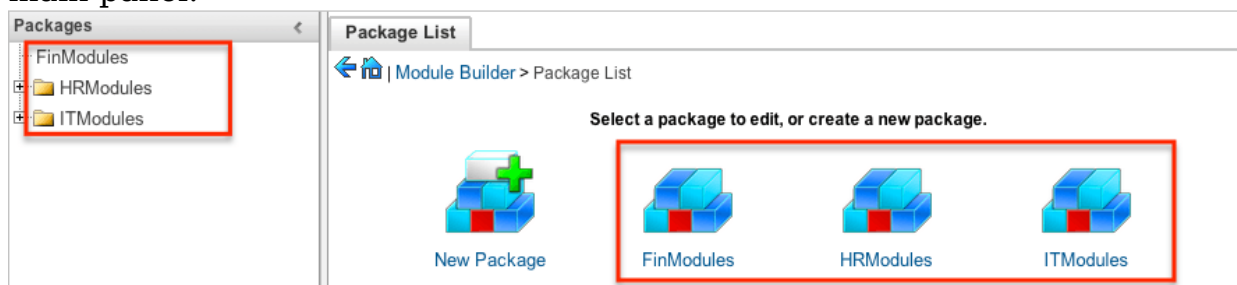
2. Click "Delete" to remove the package.
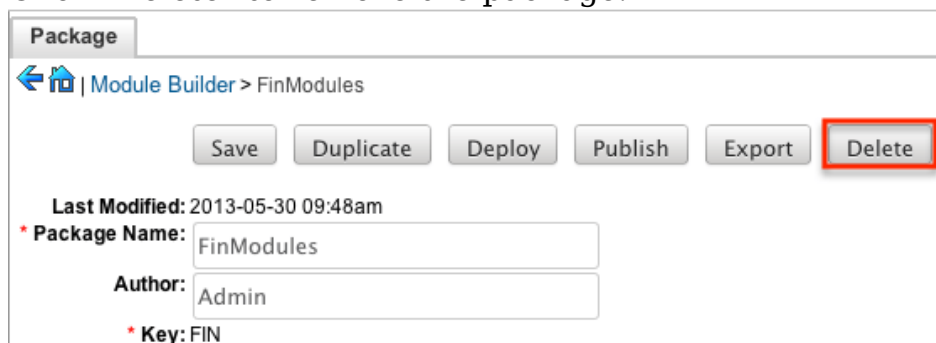
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Modules

Various types of modules can be created and configured within the package in Module Builder. Although multiple custom modules can be created in a package, it is generally recommended that only one module be created per package. This will help prevent potential issues down the road and allow greater flexibility in the future if a module is no longer needed.

Note: Activity streams are not available for custom modules.

Module Types

Module Builder comes with a few predefined module templates for creating modules. Select the module type that best fits your organization's use of the new module and then customize the module to further fit your needs.
The following module types are available by default in Module Builder:

Type	Description
Basic	Generic module with only the most basic fields defined by default. All other module types build on top of the basic module type.
Company	Contains fields designed for company, account, or organization type records. Includes billing and shipping addresses, email address, phone numbers, industry, website, and more.
File	Contains fields designed for file upload or document records. Includes category, expiration date, status, filename, and more.
Issue	Contains fields designed for bug, issue, or case record types. Includes issue number, status, priority, work log, and more.
Person	Contains fields designed for people, contacts, or lead records. Includes first and last name, primary and alternate addresses, email addresses, phone numbers, and more.
Sale	Contains fields designed for sales, transactions, or opportunities. Includes, amount, currency, probability, sales stage, and more.

Module Options

When creating modules in Module Builder, the following options are available to complete when setting it up:

- **Module Name** : The name (e.g. HelpDesk) or designation of the module. The module name is what displays in the Packages Panel as well as in Studio after deploying.
- **Plural Label** : The plural label (e.g. HelpDesks) for the module name. The label is what displays when using the module within Sugar.
- **Singular Label** : The singular label (e.g. HelpDesk) for the module name. The label is what displays when using the module within Sugar.
- **Importing** : Select this option to enable importing for the module.
- **Team Security** : Select this option to enable team security for the module. If this option is unchecked, records in this module will not be assigned to a team and will be restricted by roles only. For more information on teams and roles, please refer to the [Team Management](#) and [Role Management](#) documentation in the Administration guide.
- **Navigation Tab** : Select this option to add the module and module actions to the navigation bar.
- **Type** : Select the module type to use as a template when building the module. Each module type includes a list of stock fields by default which can be added and removed in the layout as necessary. Please note that the module type can only be selected when initially creating the module. For more information regarding the module types, please refer to the [Module Types](#) section of this page.

Creating Modules

While you have the option to create multiple types of modules within a package, it is generally recommended that only one module be created per package. Doing so will help prevent potential issues down the road and allow greater flexibility in the future if a module is no longer needed.

Creating Modules Via Package

One of the most common methods of module creation is via the New Module option in the package. When the New Module icon is selected, it opens up the New Module screen which allows you to enter in the module's details (e.g. name, label, etc.) as well as select the module type you wish to use as a template.
Use the following steps to create a custom module in the package:

1. Select a package from the Packages Panel to create a new module.
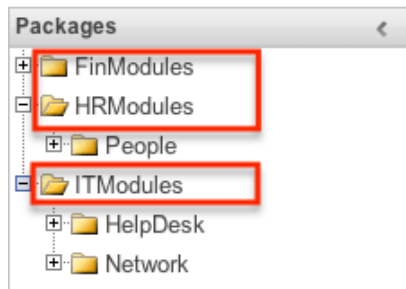
2. In the main panel select "New Module".
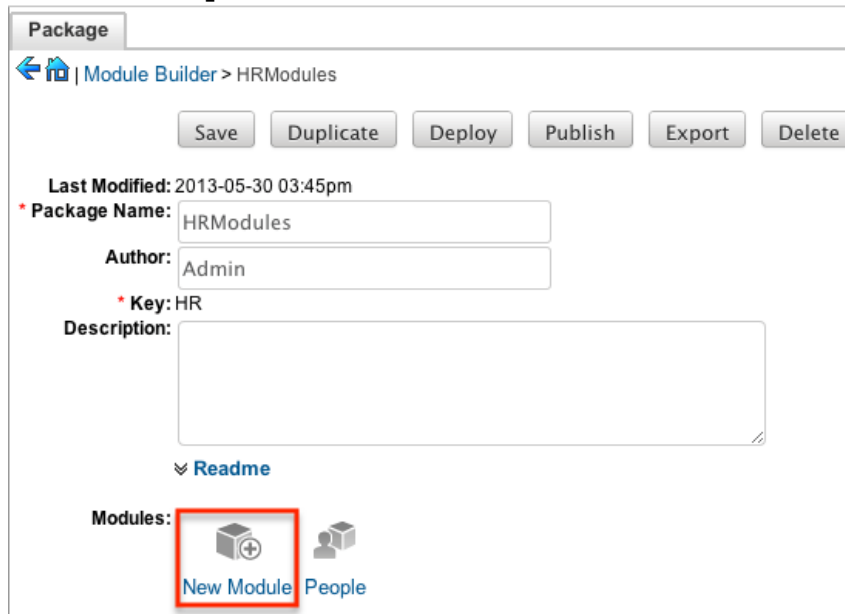
3. Enter the appropriate values for the [Module options](#). All required fields are marked with a red asterisk and must be completed prior to saving.
4. Select a module type (e.g. file) to use as a template when configuring your module.
5. Once the necessary information is entered, click "Save".
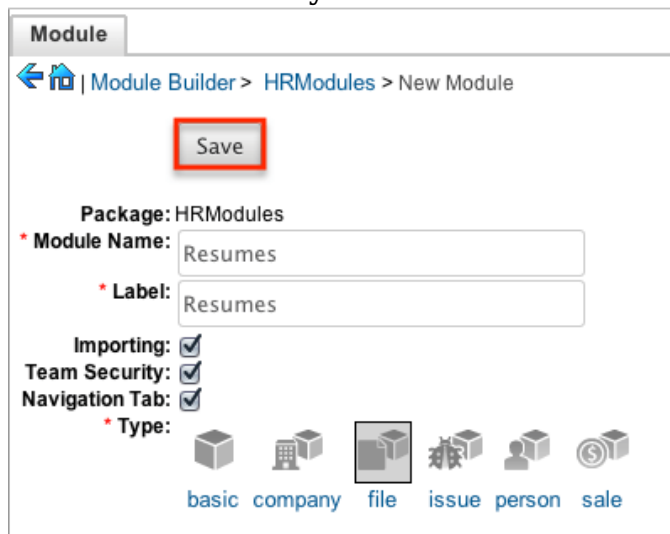
Creating Modules Via Duplication

You can also create a new module by duplicating an existing module within a package. The duplicate option is useful if the module you are creating has similar information or structure to an existing module.
Use the following steps to create a module by duplicating an existing module:

1. Select a package from the Packages panel to create a new module.
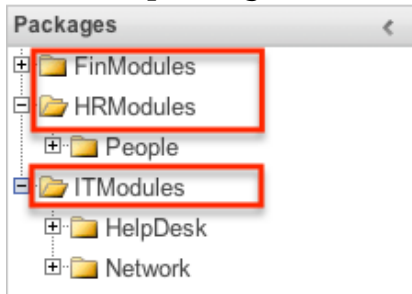
2. In the main panel, select a module to duplicate.
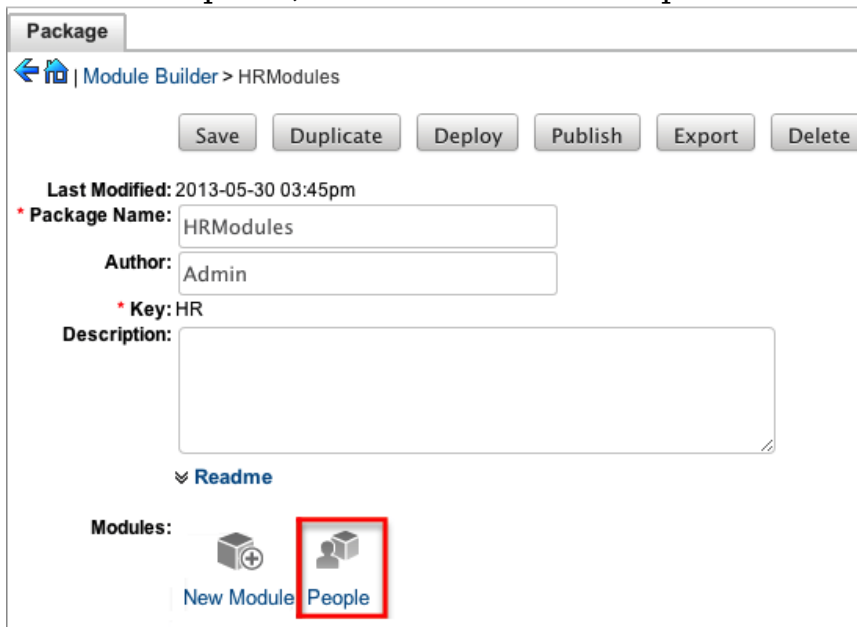
3. Click "Duplicate" to create a copy of the module.
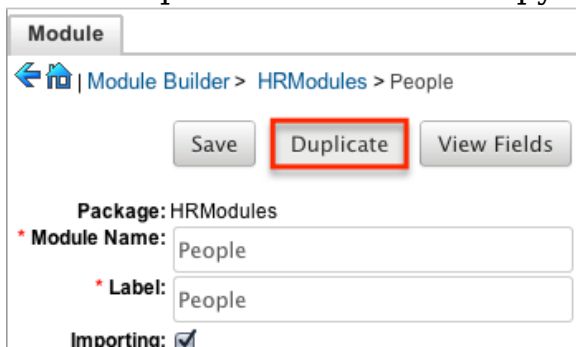
4. The selected module is duplicated to a new module with a "1" appended at the end of the module name. Update the necessary fields, then click "Save".
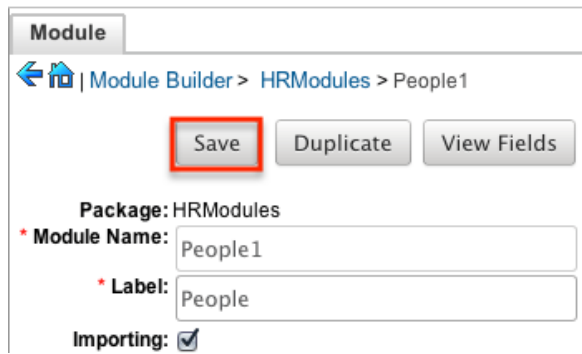
Modifying Modules

The associated fields, labels, layouts, subpanels, etc. for each module can be modified within each package. Click the plus sign (+) preceding the module name to expand the module and view the associated items (e.g. Layouts, Fields, etc.). Selecting the module from the Packages panel will load the view into the main panel. You can modify the [Module options](#) for the selected module via this page.
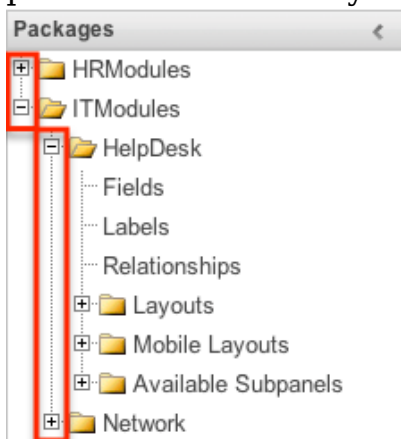
Modifying Labels

Labels are used throughout Sugar for items like buttons, field headers, subpanel titles, error messages, and more. To modify the labels for a module, select "Labels" from the Packages panel under the desired module.
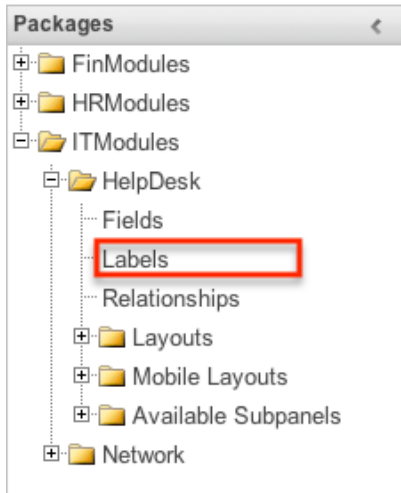
The Labels tab will open up in the main panel where you can change the names for specific labels associated to the module. Please note that you can also define the primary language to use per the language packs currently installed in Sugar when changing the labels. Select the desired language from the dropdown to view and modify the labels according to that language.
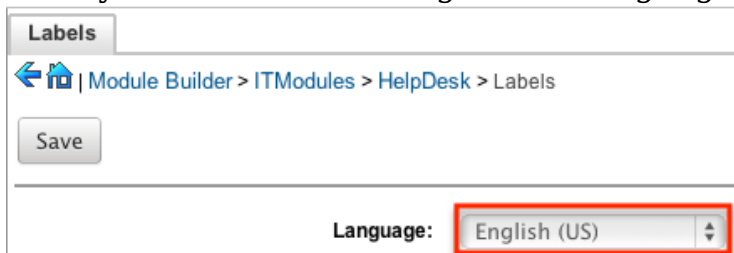
Modify the labels for the selected language and click "Save" to preserve your changes.
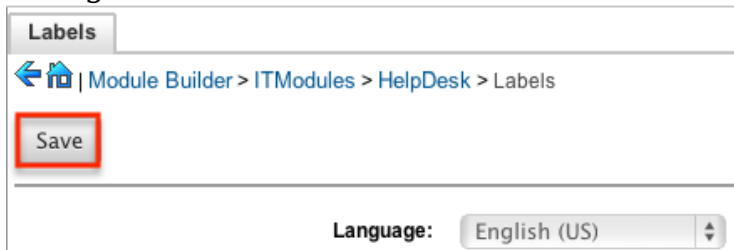
Fields

The Fields section in Module Builder allows administrators to create new fields as well as change properties on existing fields within a module. To access the Fields section in Module Builder, select "Fields" from the Packages panel under the desired module and the view will open up in the main panel to the right.
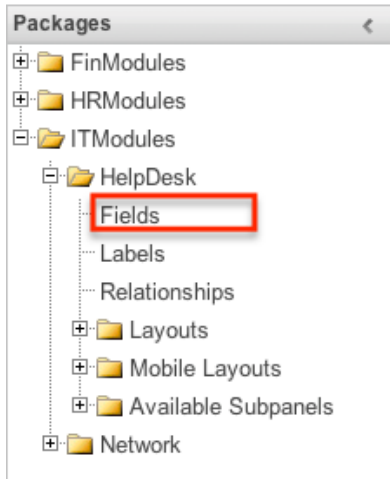
Field Types

The Fields section for each module contains a number of stock fields which come out-of-the-box with Sugar. Please note that each data type has various options and properties available to configure.

The following data types are available to be added to modules in Module Builder:

Data Type	Description
Address	Creates fields for street, city, postal code, state, and country. **Note**: Custom address fields cannot be grouped together like the stock address fields.
Checkbox	Creates a checkbox for data fields with a Yes/No action.
Currency	Creates a field to enter a currency value. The system automatically creates a dropdown of the currency type if the field does not already exist in that module.
Date	Creates a field to enter a date. Includes a button for a calendar popup.
DateTime	Creates a field to enter the date and time. Includes a button for a calendar popup as well as dropdowns for the time.
Decimal	Creates a field to hold a number rounded to a specified decimal

	precision. Sugar stores the exact representation of the number in the database (e.g. For a precision of 2: 1.236 is stored as 1.24).
DropDown	Creates a field that you can associate with a dropdown list of values.
Encrypt	Creates a field for sensitive information, such as social security numbers, whose value is to be encrypted in the Sugar database. The value is encrypted in the database but is visible in the user interface to users.
Float	Creates a field to hold a number rounded to a specified decimal precision. Sugar stores the value differently based on the database platform Sugar is running on.
HTML	Creates static HTML-formatted text to display in record views.
IFrame	Creates a field to store or generate a URL to display an iFrame in record views.
Image	Creates an image field to upload an image to display on a record.
Integer	Creates a field to specify positive or negative numbers with no decimal places.
MultiSelect	Creates a dropdown list of values where multiple values can be selected at once.
Flex Relate	Creates a dropdown list from which you can relate a single record from a variety of modules. Only one Flex Relate field is allowed per module. If the module already has a Flex Relate field, this option does not display in the Data Type dropdown list.
Phone	Creates a field to enter a phone number.
Radio	Creates a radio button for a user to select one value from a dropdown list.
Relate	Creates a field to associate a record with another module's record as a one-

	way relationship. You can add multiple Relate fields to a module. **Note**: Relate fields and custom relationships are independent of each other. Changes made to either one are not reflected in the other. Relate fields can be added to a report, but any data on the related record cannot be accessed in the report. To access related record data in a report you will need to create a custom relationship.
TextArea	Creates an open text area field for multiple lines of text.
TextField	Creates a field for a single line of text.
URL	Creates a field to store or generate a URL and display as a link.

Field Options

Fields provide ways to store different data types in Sugar. While many fields come out-of-the-box with Sugar by default, there can be instances where your organization needs to store additional data.

When creating or modifying fields via Module Builder, there are some properties that exist across all field types, and there are some that are unique to only a few types.

The following field properties and options are available in Sugar:

- **Audit** : Select this checkbox to audit the field for changes made in Sugar.
    - Users can view the changes made to audited fields via the View Change Log option in the module's record view (for Sidecar modules).
    - **Note**: The Audit option is available for all data type fields.
- **Boost value** : Enter a boost value for the field to enhance the relevancy of the field for full text search.
    - The default boost value is 1.0 which indicates 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.
    - **Note**: It is not necessary to perform a full system index when boost values are changed for fields.

- **Border** : Select this checkbox to add a border around the image for this field.
    - ◦ **Note**: The Border option is only available for Image data type fields.
- **Calculated Value** : Select this checkbox to designate this field as a calculated field.
    - ◦ This opens up the Formula option and disables the Default Value and Importable options. For more information regarding entering a formula for a calculated value, please refer to the Formula option listed in this section.

    - ◦ The result of the formula will be entered into the field for any new or modified records. When selecting this option, the field value cannot be modified by users.
    - ◦ **Note**: The Calculated Value option is only available for the following data type fields:

Checkbox	Currency
Date	Datetime
Decimal	Encrypt
Float	Integer
Phone	TextArea
TextField	

- **Columns** : Enter the number of columns to specify the width of a TextArea data type field.
    - ◦ **Note**: The Columns option is only available for TextArea data type fields.
- **Comment Text** : Enter a comment or description about the field. The comment text is only viewable via Module Builder and Studio.
    - ◦ **Note**: The Comment Text option is available for all data type fields except Flex Relate.
- **Default Value** : Specify or select a default value for this field when a record is created. Default values for the record are populated by default on the record view layout, but can be modified by users.
    - ◦ **Note**: The Default Value option is available for all data type fields except HTML, Image, Flex Relate, and Relate.
- **Dependent** : Select this option to designate this field as being dependent on a formula or a parent dropdown.
    - ◦ For DropDown data type fields you can select "Parent Dropdown" or "Formula" for the dependency.

- Selecting "Parent Dropdown" will open the Parent Dropdown option as shown below. Selecting "Formula" will open the Visible If option to create a dependency formula. For other field data types (e.g. Date), select the Dependent checkbox to open the Visible If option. For more information regarding entering a formula to make a dependent field visible, please refer to the Visible If option listed in this section.

- **Note**: The Dependent option is available for all data type fields except Address.
- **Disable Format** : Select this checkbox to disable number formatting such as the thousands separator.
  - **Note**: The Disable Format option is only available for Integer data type fields.
- **Display Label** : Enter a value to display as the field label and header in layouts. Normally defaults to the Field name entered when creating the field.
  - This value is also modifiable in the packages panel under Labels.
  - **Note**: The Display Label option is available for all data type fields except Flex Relate. Flex Relate uses the Label Value option.
- **Drop Down List** : Select a list of values to associate to the field.

  - Only values in the chosen list will be available for selection in the field. Click "Edit" to change the values for the currently selected list, or click "Add" to create a new list.
  - **Note**: The Drop Down List option is only available for the DropDown, MultiSelect, and Radio data type fields. For more information on editing dropdown values via the Dropdown Editor, please refer to the Editing Dropdown Lists section of the Developer Tools documentation.
- **Duplicate Merge** : Select one of the following options to determine the field's functionality when records are being merged:
  - **Disabled** : Selected by default. The field will not appear in the Merge Duplicates feature and will not be available to use for the filter conditions in the Find Duplicates feature.
  - **Enabled** : The field will appear in the Merge Duplicates feature, but will not be available to use for the filter conditions in the Find Duplicates feature.
  - **In Filter** : The field will appear in the Merge Duplicates feature,

and will also be available in the Find Duplicates feature.

- ○ **Default Selected Filter** : The field will be used for a filter condition by default in the Find Duplicates page, and will also appear in the Merge Duplicates feature.
- ○ **Filter Only** : The field will not appear in the Merge Duplicates feature, but will be available in the Find Duplicates feature.
- ○ **Note**: The Duplicate Merge option is available for all data type fields except Image.
- **Field Name** : Enter the name of the field being created. Once a field has been created, the field name cannot be changed.
  - ○ Field names can contain only alphanumeric characters as well as the underscore character.
  - ○ **Note**: The Field Name option is required for all data type fields.
- **Full Text Searchable** : Specify whether or not the field should affect Global Search results.
  - ○ **Disabled** : Select "Disabled" if you do not want this field to be captured when the database is indexed for searches. Search indices collect the values of searchable fields for evaluation by the Global Search.
  - ○ **Searchable** : Select "Searchable" to include this field's value in search indexes.
    - Selecting "Searchable" will reveal the Boost value field, which allows you to set a relevance weight for searches. When a user's search query matches the value of a field with a higher boost level, the record will appear higher in the search results. For more information regarding boost values in Full Text Search, please refer to the [Search](#) documentation in the Application guide.
    - **Note**: The Full Text Searchable option is only available for the following data type fields:

Phone	TextArea
TextField	URL

- **Formula** : Contains the current formula to return a calculated value.
  - ○ Click "Edit Formula" to launch the formula builder and change the formula. For more information on how to build a formula using the formula builder, please refer to the [Using Sugar Logic](#) section of this page.

  - ○ **Note**: The Formula option is only available when the Calculated Value option is selected.
- **Generate URL** : Select this checkbox to allow variables from the current

module to be placed into the Default Value option for creating dynamic URLs.

- This is useful for providing links or iFrames to internal systems such as an ERP or to external systems such as Google Maps.
- Select the desired field to add from the dropdown and click "Insert Field" to add the field to the Default Value. When selecting this option, the field value cannot be modified by users.
- **Note**: The Generate URL option is only available for IFrame and URL data type fields.
- **Height** : Enter the number of pixels to vertically scale the image for this field. Enter only the Width or Height options to retain the aspect ratio of the image.
  - **Note**: The Height option is only available for Image data type fields.
- **Help Text** : Enter in basic instructions for populating this field. The text entered here will display when users hover their mouse on the field in record view.
  - **Note**: The Help Text option is available for all data type fields.
- **HTML** : Enter in static rich text with formatting or HTML code to display on a record. For more information on how to use the text editor please refer to the [TinyMCE](#) section of the User Interface documentation in the Application guide.
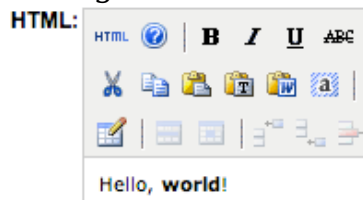
- **Note**: The HTML option is only available for HTML data type fields.
- **IFrame Height** : Enter the number of pixels for the height of the IFrame field. The width of the IFrame field is always the width of the field container.
  - **Note**: The IFrame Height option is only available for IFrame data type fields.
- **Importable** : Select one of the following options to determine the field's functionality when records are being imported:
  - **Yes** : The field can be included in an import operation.
  - **No** : The field cannot be included in an import.
  - **Required** : A value for the field must be provided in any import.
- **Label Value** : Enter a value to display as the field label and header in layouts. This value is also modifiable in the packages panel under [Labels](#). Defaults to "Flex Relate".
  - **Note**: The Label Value option is only available for Flex Relate data type fields.

- **Mass Update** : Select this checkbox to add this field as an option to mass update.
    - **Note**: The Mass Update option is only available for the following data type fields:

Date	Datetime
DropDown	MultiSelect
Radio	

- **Max Size** : Enter the maximum amount of characters allowed for this field. Defaults to 255.
    - **Note**: The Max Size option is only available for the following data type fields:

Address	Decimal
Float	IFrame
Integer	Phone
URL	TextField

- **Max Value** : Enter the highest value allowable for this field. If a user enters a higher value in the field than the specified value, a notification will appear upon save informing them of the set maximum value.
    - **Note**: The Max Value option is only available for Integer data type fields.
- **Min Value :** Enter the lowest value allowable for this field. If a user enters a value in the field that is lower than the specified value, a notification will appear upon save informing them of the set minimum value.
    - **Note**: The Min Value option is only available for Integer data type fields.
- **Module** : Select a module from the dropdown to relate to the current module.
    - A module can relate back to itself, a good example of this would be a relate field on Contacts to relate back to Contacts for a referred by field. This will allow users to select which contact record referred a different contact. The chosen module cannot be modified once the field is created.

    Module: Contacts ⬍

    - **Note**: The Module option is only available for Relate data type fields.
- **Open Link In** : Select one of the following options to determine how a URL will open:
    - **New Window** : Opens the URL in a new Tab or Window depending on your browser and settings.

- ◦ **Same Window** : Opens the URL in the same window as the record you are currently browsing.
  - ◦ **Note**: The Open Link In option is only available for URL data type fields.
- **Parent Dropdown** : Select an option from the dropdown to specify the parent that controls the visibility of this dropdown field.
  - ◦ The Parent Dropdown option is populated with the other dropdown data type fields in the current module.

  - ◦ **Note**: The Parent Dropdown option is only available when the Dependent option has "Parent Dropdown" selected.
  - ◦ Click "Edit Visibility" to specify which options are available from the current dropdown for each value of the parent dropdown. In the Visibility Editor window, drag values from the current dropdown list to the value sections of the parent dropdown.

  - ◦ This will determine which options in the dropdown list are available when the parent dropdown is set to the specified value. In this example, if the parent dropdown is set to "Apparel", then the current dropdown will have options 1, 2, and 3 where if the parent dropdown is set to "Banking", then the current dropdown will only have options 2 and 3 available. If there are no available options for a parent dropdown value, then the dependent dropdown will not display. To remove an item from the list, simply click and drag the value to the Trash bin on the left. Once the values are set, click "Save" to preserve your changes.

- **Precision** : Enter a number to specify the number of digits to the right of the decimal point the value should be stored as in Sugar.
  - ◦ **Note**: The Precision option is only available for Decimal and Float

data type fields.

- **Reportable** : Select this checkbox to allow the field to be used in reports.
  - **Note**: The Reportable option is available for all data type fields except Encrypt, Flex Relate, HTML, IFrame, and Image.
- **Required Field** : Select this checkbox to mark the field as required in Sugar. The user will be required to enter a value for the field before saving the record.
  - **Note**: The Required option is available for all data type fields except Checkbox and HTML.
- **Rows** : Enter the number of rows to specify the height of a TextArea data type field.
  - **Note**: The Rows option is only available for TextArea data type fields.
- **System Label** : Enter the system value for storing the label of the field. This is defaulted to the name of the field preceded by "LBL". Any lowercase characters entered will be converted to an uppercase upon saving. Once the field has been created, the system label cannot be changed.
  - It is recommended that administrators avoid naming fields with the same system label in order to prevent the same label and header values from existing in the system.
  - **Note**: The System Label option is available for all data type fields.
- **Visible If** : Contains the current formula to determine if a field is visible on the layout or not.
  - Click "Edit Formula" to launch the formula builder to change the formula.

  - The formula must result in a Boolean (true/false) response. For more information on how to build a formula using the formula builder, please refer to the [Using Sugar Logic](#) section of this page.
  - **Note**: The Visible If option is only available when the Dependent option is checked or "Formula" is selected from the dropdown.
- **Width** : Enter the number of pixels to horizontally scale the image for this field. Enter only the Width or Height options to retain the aspect ratio of the image.
  - **Note**: The Width option is only available for Image data type fields.

Creating Fields

Use the following steps to create a new field via Module Builder:

1. Expand out the tree under the desired module in the Packages panel and select "Fields".
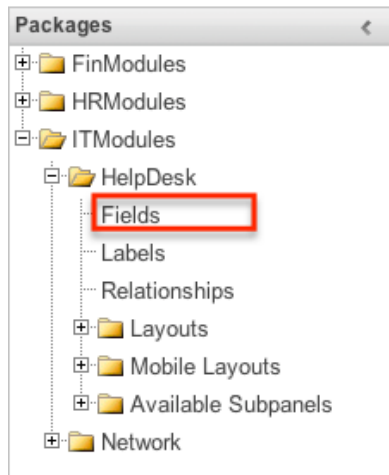
2. In the main panel click "Add Field".

3. Enter appropriate values for the **Field options**. Please note that Field Name is required.

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

5. Once a field is created it must be placed on the record view layout in order for users to enter data into that field. For more information on editing layouts, please refer to the **Editing Layouts** section of this page.

Editing Fields

Use the following steps to edit an existing field via Module Builder:

1. Expand out the tree under the desired module in the Packages panel and select "Fields".

2. In the main panel, select a field to edit. Sorting the fields by the column header will help in locating the field faster.
   ○ **Note**: Fields created via Module Builder will display an asterisk (*) in front of their name.

3. Update the necessary Field options and click "Save" once complete.

Deleting Fields

Use the following steps to delete an existing field via Module Builder:

1. Expand out the tree under the desired module in the Packages panel and select "Fields".

2. In the main panel, select a field to delete. Sorting the fields by the column header will help in locating the field faster.
   - Fields created via Module Builder will display an asterisk in front of their name.
   - **Note**: Fields added via the module type template cannot be deleted.

3. Select "Delete" to remove the field.

4. A pop-up message will display asking for confirmation. Click "Ok" to proceed.
   - Before deleting a field please verify and resolve the following issues:
     1. Field must be removed from any report filters or displays.
     2. Field must be removed from any workflows that filters or displays the field.
     3. Field must be removed from any dashlet that filters or displays the field.
     4. Field must be removed from any Sugar Logic formulas.
     5. Field must be removed from any email templates.
     6. Field must be removed from any saved searches.
5. The field will automatically be removed from any module layouts when deleted.
   - **Note**: When deleting fields in a module and re-deploying the

package, the data related to the field in the database will not be removed.
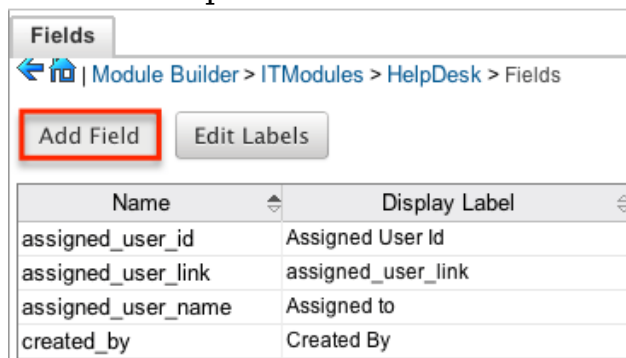
Cloning Fields

Use the following steps to clone an existing field via Module Builder:

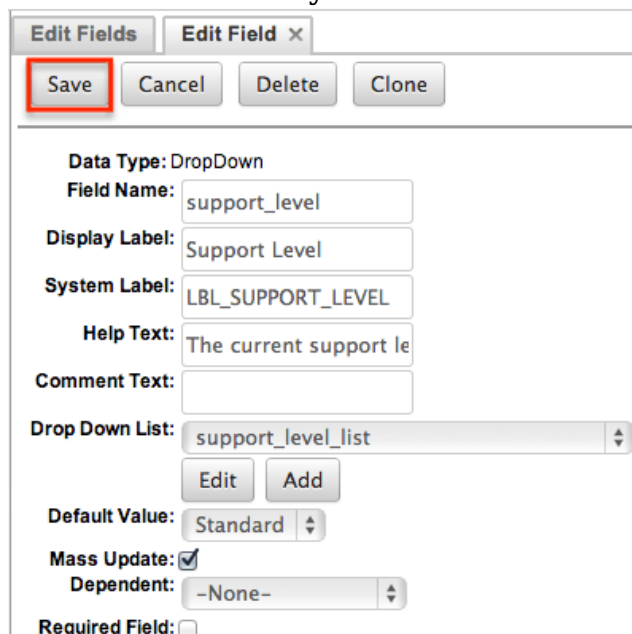1. Expand out the tree under the desired module in the Packages panel and select "Fields".

2. In the main panel, select a field to delete. Sorting the fields by the column header will help in locating the field faster.
   - **Note**: Fields created via Module Builder will display an asterisk (*) in front of their names.

3. Select "Clone" to duplicate the field.
   - **Note**: Some non-standard stock fields (e.g. Name) do not have the

ability to clone.

4. Enter appropriate values for the Field options.
5. Once the necessary information is entered, click "Save".

Relationships

Relationships define the links between different modules in Sugar and allow records between those modules to be related. Related records display in fields or subpanels on a module's detail page depending on the relationship type. When you create a new relationship between two modules, the system automatically creates the necessary subpanels, related fields, and metadata relationships. Relationships provide the added benefit in reports to allow access to a related records fields in addition to the base module's fields.

The relationships section in Module Builder allows administrators to create new relationships between custom and stock modules as well as change some properties on existing relationships. To access the relationship section in Module Builder, select "Relationships" from the Packages panel under the desired module.
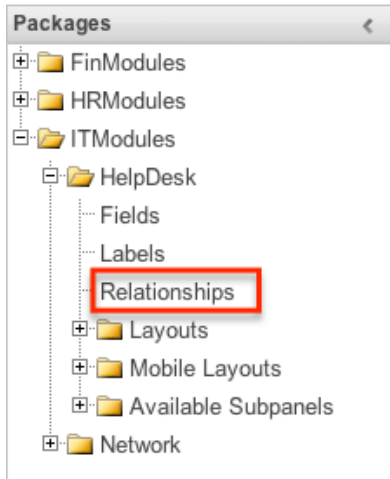
Note: Relationships created through Module Builder cannot be deleted in Studio after being deployed. Due to this, it is recommended that relationships be created in Studio after deploying the module instead of via Module Builder. As a best practice, never re-deploy the module from Module Builder as it will remove all customizations made to your module via Studio, code customizations, etc.

Relationship Types

Sugar contains a few different types of relationships you can create between modules. The relationship type will determine what fields or tables will be created in the database as well as what interface the user will see to manage the relationship.
The following relationship types are available in Module Builder:

- **One-to-One** : Records in the primary module and the related module are uniquely related to each other. For a one-to-one relationship between Accounts and Contacts, an account can be associated with only one contact and a contact can be associated with only one account. The relationship will show as a field in each module's record view where changing the relationship from either module will also change the value in the other module.

    - From the primary Accounts module:

    - From the related Contacts module:

Note: You can create a one way relationship between modules using relate fields. For more information regarding relate fields, please refer to the Field Types section of this page.

- **One-to-Many** : Records in the primary module can have relationships with many records in the related module. For a one-to-many relationship between Accounts and Contacts, an account can be associated with many contacts, but each contact can be associated with only one account. The record view of the primary module will display a subpanel for the related module, and the detail view of the related module will display a field containing a link to the related record.

    - From the primary Accounts module:

    - From the related Contacts module:

Note: A one-to-many relationship is the same as a many-to-one relationship except the Primary and Related modules are reversed. Adding a custom one-to-many relationship to "Activities" will add custom relationships to calls, meetings, notes, tasks, and emails. This will also automatically add these subpanels to the record view.

- **Many-to-Many** : Records in both the primary module and the related module can have multiple records related in each module. For a many-to-many relationship between Accounts and Contacts, an account can be associated with many contacts, and a contact can be associated with many accounts. Both module's record view will display a subpanel for the opposite module.

    ○ From the primary Accounts module:

    ○ From the related Contacts module:

Note: Only modules with subpanels available can be on the "Many" side of a relationship. For example, the Product Catalog module lacks a subpanel; therefore, Product Catalog can only be selected on the "One" side of a relationship.

When you create a relationship for a module, the selected module is considered to be the primary module and the module that you relate it with is the related module.

You can also create a relationship between a module and itself. In this case, the relationship becomes a parent-child relationship. For example, you can create a relationship from Accounts to Accounts in order to create sub-accounts within the primary account.

Creating Relationships

Use the following steps to create a new relationship via Module Builder:

1. Expand out the tree under the desired module in the Packages Panel, and select "Relationships".
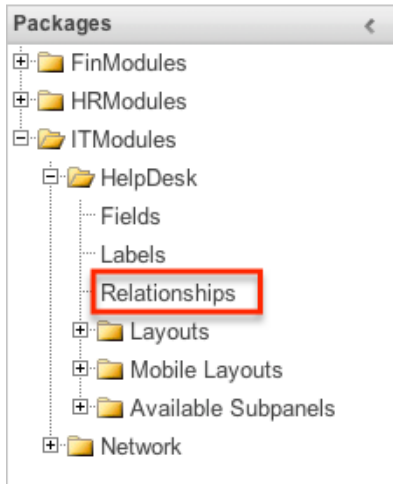
2. In the main panel, click "Add Relationship".
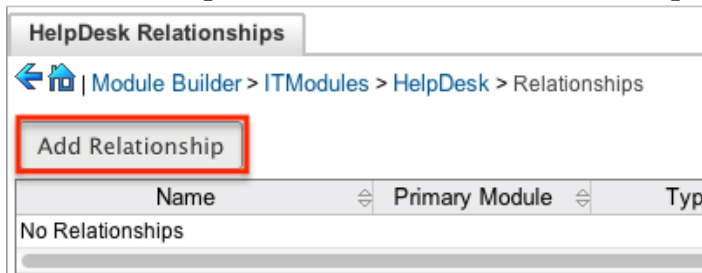
3. Enter appropriate values for the following options:
   Type : Select the type of relationship to create from the options in the [Relationship Types](#) section.
   Module : The Primary module is set to the module you are adding the relationship to. Select the Related module from the dropdown. The Primary and Related module can be the same in order to create a parent-child relationship.
   Label : Enter a label to reference the Primary module or Related module's subpanels for this relationship. This option is only available for the "Many" side of a relationship.
   Subpanel from : Select a subpanel option to display the Primary or Related module's records in. This will determine the fields displayed in the subpanel. This option is only available for the "Many" side of a relationship.
4. Once the necessary information is entered, click "Save".
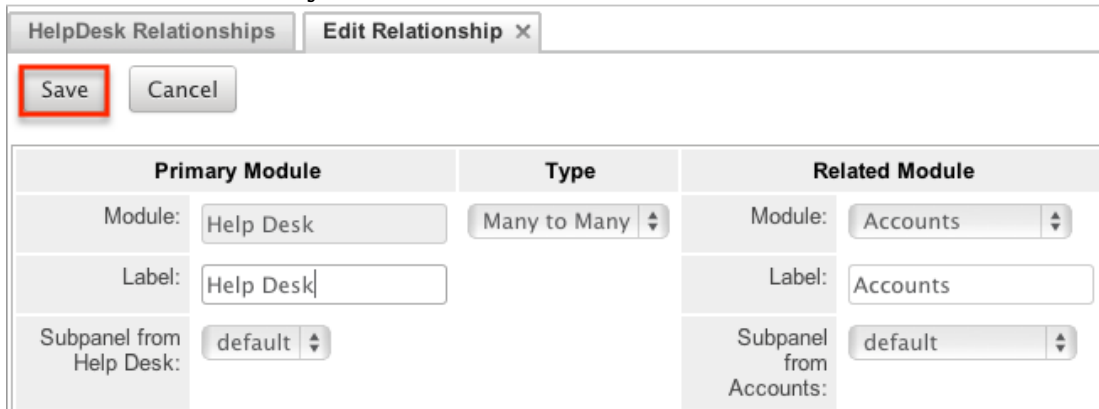
5. The required fields and subpanels are instantly created and saved in the

package.

Editing Relationships

Use the following steps to edit a relationship via Module Builder:

1. Expand out the tree under the desired module in the Packages Panel, and select "Relationships".
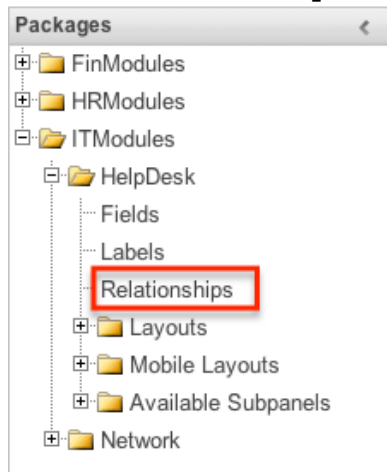
2. In the main panel, select a relationship to edit. Click the column headers to sort the grid by different columns to assist in locating the relationship.
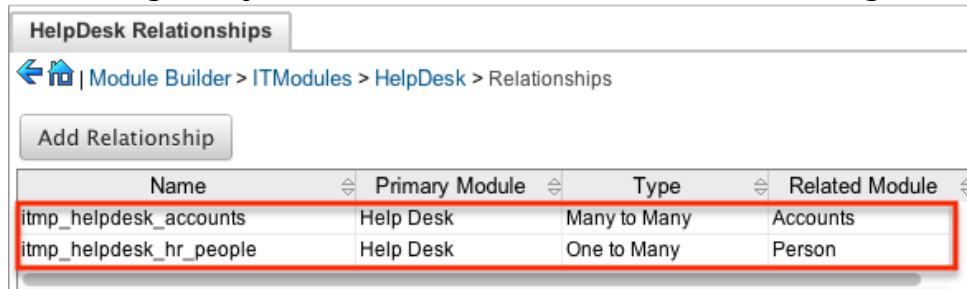
3. The only editable field on a relationship is the Label field for naming the Primary or Related module subpanels. Please note that this option is only available for the "Many" side of a relationship.
4. Once the necessary information for the Label field is entered, click "Save".
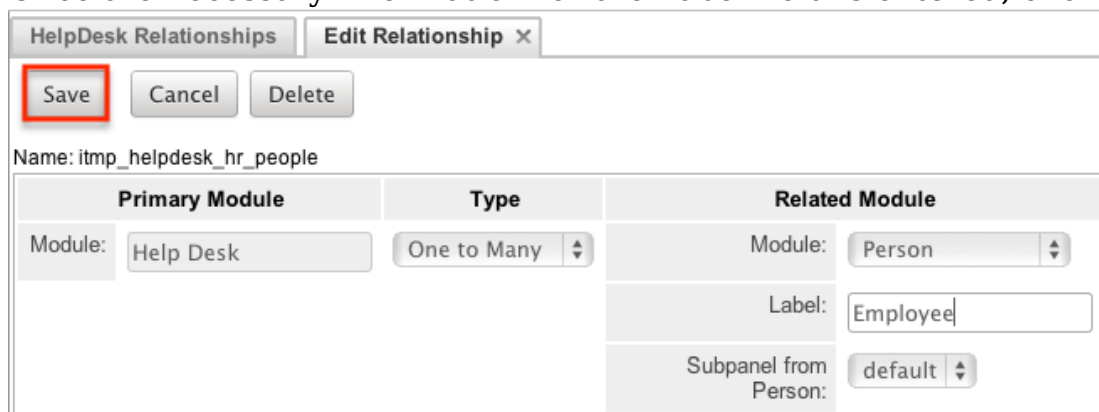
Deleting Relationships

Use the following steps to delete a relationship via Module Builder:

1. Expand out the tree under the desired module in the Packages panel and select "Relationships".
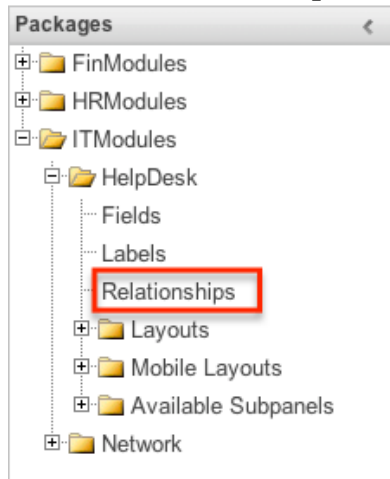
2. Select a relationship to delete in the main panel. Click the column headers to sort the grid by different columns to assist in locating the relationship.

3. Click "Delete" to remove the relationship.
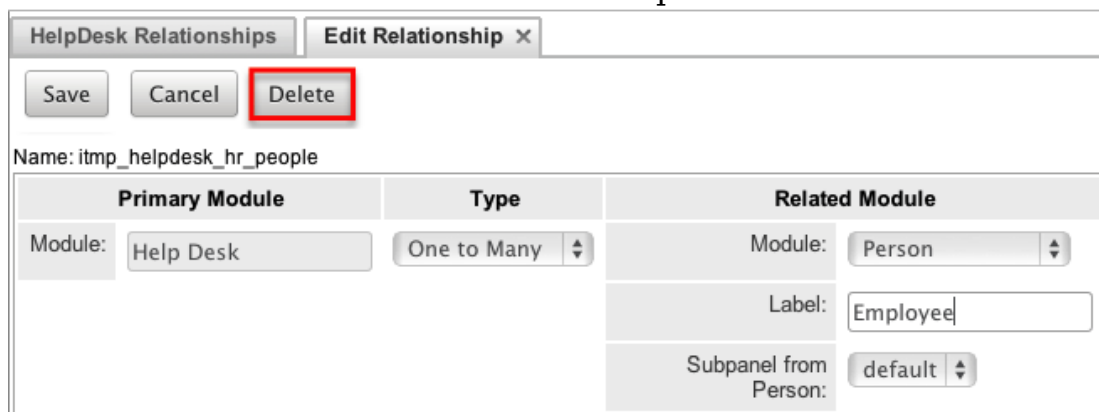
4. A pop-up message will display asking for confirmation. Click "Yes" to proceed.
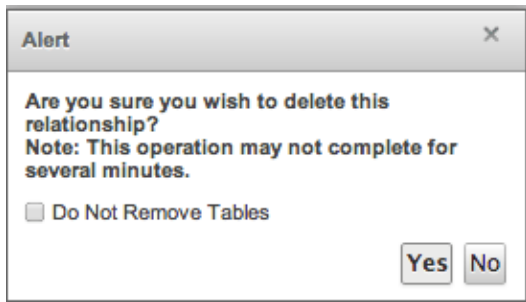
Note: If you wish to retain the data and table structure that currently exists for the relationship, select the "Do Not Remove Tables" option. Leaving the "Do Not Remove Tables" unchecked will delete the relationship data and remove the tables for the relationship from the database when the package is installed.

Before deleting a relationship please verify and resolve the following issues:

- Relationship must be removed from any report filters or displays.
- Relationship must be removed from any workflows that filters or displays fields from the relationship.
- Relationship must be removed from any Sugar Logic formulas referencing the relationship.

Layouts

Layouts are used to represent many screens in Sugar. The layouts section in Module Builder allows administrators to add fields and configure layouts. To access the layouts section, expand "Layouts" from the packages panel under the desired module. The available layouts for the selected module will appear below.
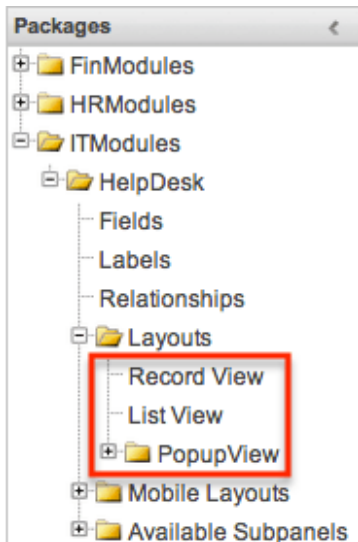
Layout Types

Sugar comes with different types of layouts to represent different sections of Sugar. Please note that not all layouts are available in every module.
The following layouts are available to configure in Module Builder:

- **Record View** : Record view layout is used to modify, create, or view a record within the specified module. Please note that this layout is specific to modules using the Sidecar user interface.
- **List View** : List view layout is used to view multiple records within the specified module and displays all results meeting the current search criteria.
- **Popup List View** : Popup list view layout is used to view multiple records via a popup window used to locate and select records in the specified module.
  For Sidecar modules:
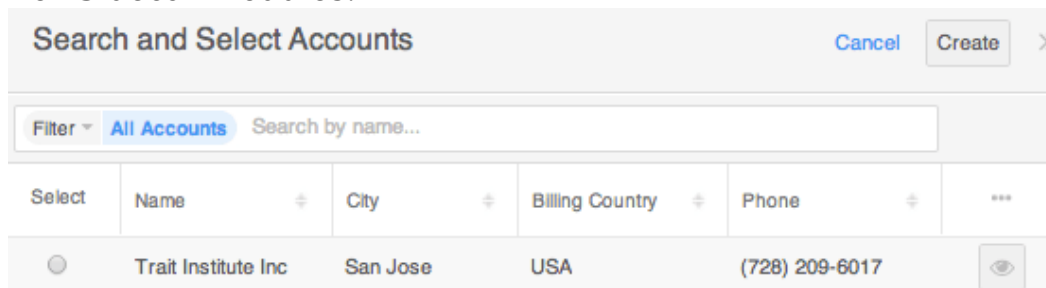
- **Popup Search** : Popup search layout is used to allow users to perform a search via the the popup window used to select records in the specified module.
  For Sidecar modules:
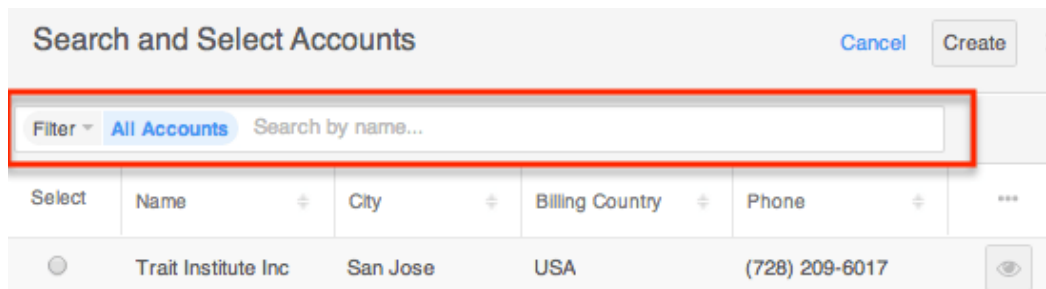
Layout Options

Administrators have the ability to configure the various layouts (e.g. record view, list view, etc.) available via Module Builder. Please note that the layouts can be configured via Admin > Studio as well once the module has been deployed. For more information on configuring layouts, please refer to the Studio documentation.

The following are some of the options available to administrators when configuring layouts via Module Builder:

- **Panels** : Every field on a layout is contained within a panel. Panels can be

open or collapsed by default and have a title defining the panel. Panels can be organized to contain groups of similar or related fields to assist in organization.

Select the Pencil icon next to the Panel title to modify the title. Select the Collapsed? checkbox to default the panel as collapsed. Users can open and close panels as the wish.
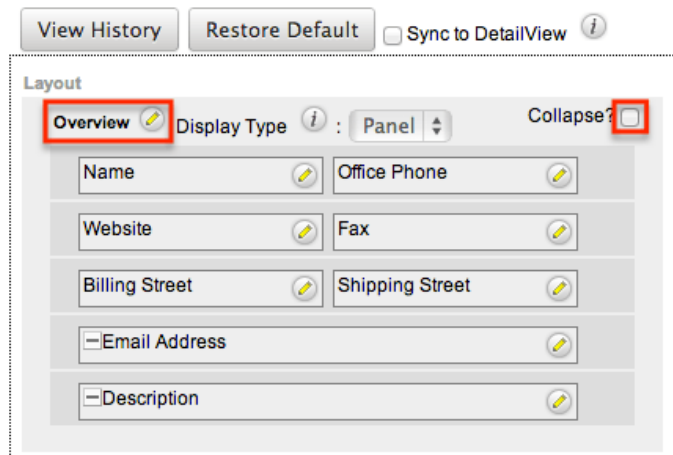
Note: The default panel name cannot be modified in Module Builder.

- **View History** : Sugar preserves a history of the changes made to each layout. Click "View History" and the History dialog box will display the timestamp of when changes occurred and allow you to preview the layout then restore if you wish. For more information on viewing the history of layouts, please refer to the Viewing Layout History section of this page.
- **Restore Defaults** : Sugar provides the option to restore a layout to its original default configuration. For more information on how to restore the default layout, please refer to the Restoring Layout Defaults section of this page.

Editing Layouts

You can add, remove, hide, etc. the fields for the available layouts in the module by selecting the specific layout under the Packages panel to edit. Please note that the List View and Popup View layouts have columns where you can designate fields users can and cannot see.

Editing Record View Layout

The following steps cover editing the Record View layout as an example:

1. Expand "Layouts" from the Packages panel under the desired module and select the layout (e.g. Record View) you wish to edit. The Record View layout will display in the main panel to the right.

2. To add a field to the Record View layout, drag the field from the list of fields in the Toolbox to a "(filler)" location on the layout per your preference.
   ○ You can also drag a field to a location on the layout that already has a field in place. The newly added field and the existing field on the layout will swap places.
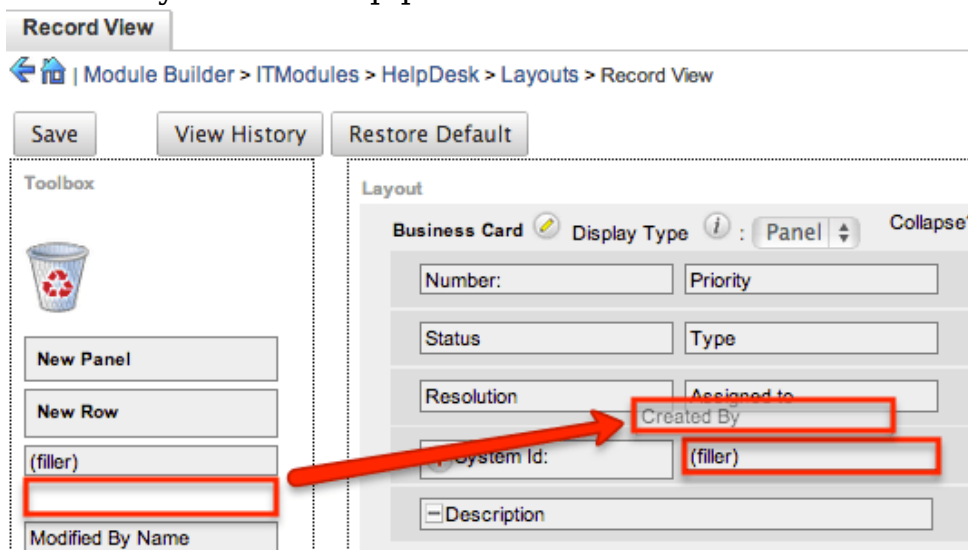
3. To remove a field from the layout, drag and drop the field from the layout to the trash bin in the toolbox to remove the field from the layout. You may remove an entire row in the layout using the same method.

4. To expand or minimize the field column in the layout, click the Plus icon (+) to stretch the field over two columns or click the Minus icon (-) to fit the field into one column.
   - **Note**: The layout will display a "(filler)" if there is no field in that location.
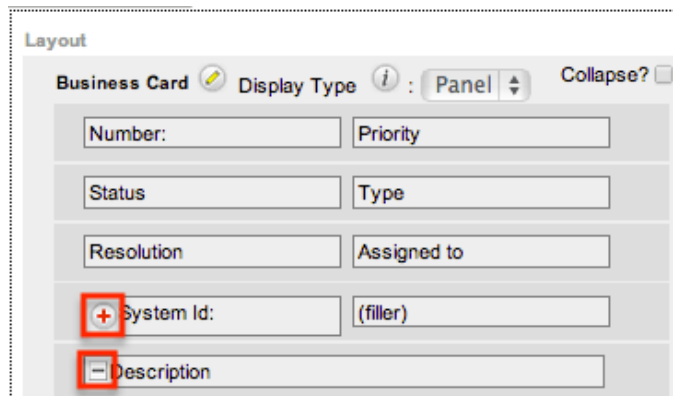
5. To add a new row, drag the "New Row" item in the Toolbox to the layout to allow additional fields or blank spaces to be added.
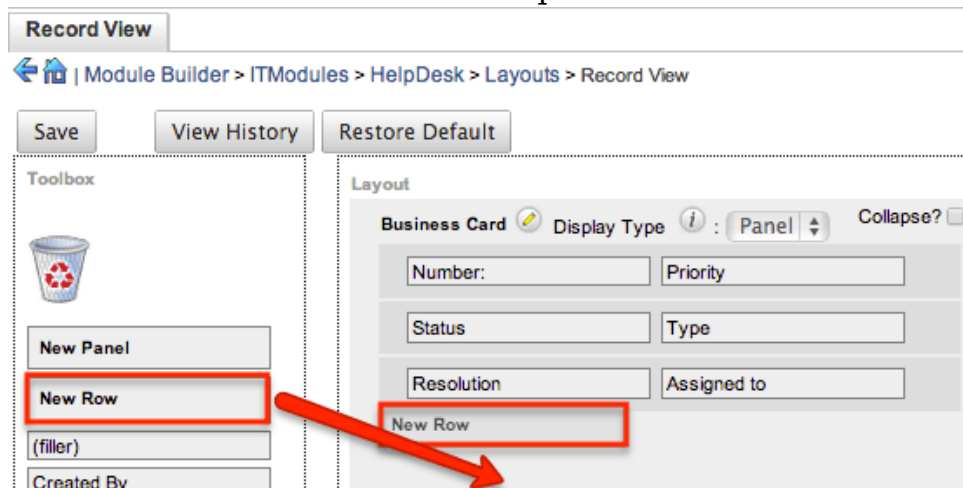
6. To add a new panel, drag the "New Panel" item in the Toolbox to the layout to group different sets of fields together in the Record View layout.
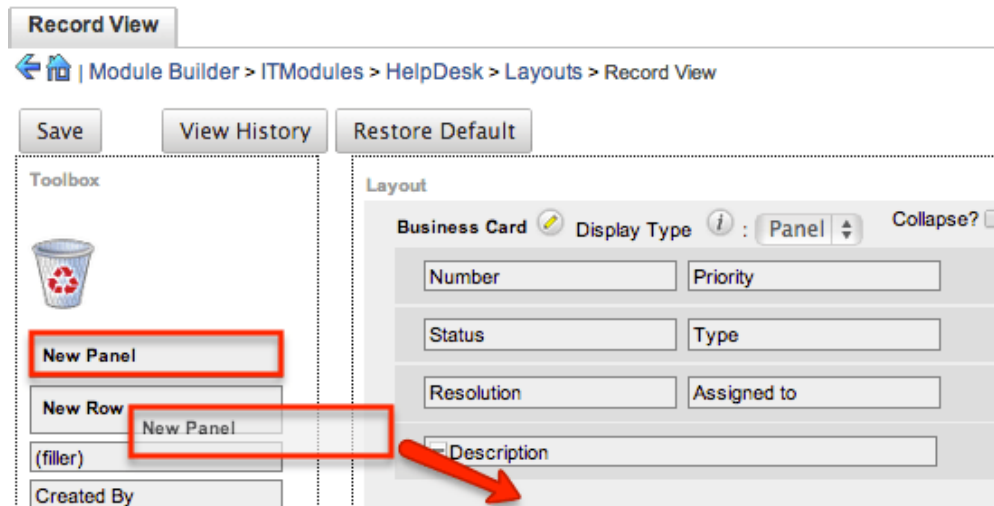
7. Once the layout is finalized, click "Save" to preserve your changes.

Note: It is recommended that dependent fields be placed below and/or to the right of the independent field in order to preserve the correct display of fields on the layout.

Editing List View Layout

Unlike the Record View layout, the List View layout has columns where you can designate fields users can and cannot see. When configuring the List View layout, you will see three columns (Default, Available, Hidden) where fields can be dragged and dropped accordingly.

Please note that editing the List View layout affects the list of available fields for the module's list view dashlet as well since both are controlled by the same layout (List View). Once the custom module is deployed, the configurations made to the list view layout in Module Builder will be reflected in the Columns fields of the corresponding module dashlet's Configuration Options page. After the custom module is deployed, all succeeding changes to the List View layout can be made via Studio. Please keep in mind that the custom module dashlet will not automatically reflect the Studio changes and users must edit the dashlet in order to view the changes, add new fields to the layout, etc.

Administrators can easily set the column widths for specific fields when configuring the List View layout. You can choose from a pre-defined list of width

sizes (e.g. small, medium, large, etc.) that are available out-of-the-box with Sugar or enter a custom width value in pixels (e.g. 200) for Sidecar modules.

Note: When defining the column width for currency fields (e.g. Likely, Best, etc.), only "large" and above will apply because there is a minimum width requirement in Sugar for this field type. In addition, when defining a custom width for currency fields, the value must be 141px or wider.

The following table lists the available column width sizes in Sugar along with the corresponding width in pixels:

Table column widths

Name	Width	Example
xxsmall	21px	Ex.
xsmall	42px	Exam
small	68px	Example
medium	110px	Example
large	178px	Example
xlarge	288px	Example
xxlarge	466px	Example

- **Default** : This column contains fields that are displayed in the layout.
- **Available** : Available fields are fields that will not show by default in the layout, but if the layout can be personalized, users can add these fields to their view of the layout. Not all list type layouts have an available fields section.
- **Hidden** : This column contains fields that will not be displayed in the layout.

The following steps cover editing the List View layout as an example:

1. Expand "Layouts" from the Packages panel under the desired module and select "List View".
2. To add a field to the List View layout, drag and drop the fields from the Hidden column to the Default column.
   - **Note**: The fields in the Default column will be available to add as display columns in the corresponding custom module dashlet (e.g. My HelpDesk).

3. To remove a field from the layout, drag and drop the field from the Default column to the Hidden column.
4. To change the left-to-right order of the fields displayed on the list view, drag and drop fields up or down within the Default list.
   - **Note**: The order of fields designated for the List View layout also affects the order for the list of available fields in the corresponding custom module dashlet (e.g. My HelpDesk).
5. To modify the label of the field, as well as the width of the field, click the Pencil icon next to each field.
6. Enter the new label or select the width (e.g. small, medium, large, etc.) then click "Save". Please note the modified label will display in all List View layouts for this module.
   - **Note**: Administrators can choose from a pre-defined list of width sizes (e.g. default, small, medium, etc.). Please note that selecting the Default width will set the list view column to equal the Medium width size. Selecting "custom" from the list will allow you to enter a custom width value in the open box. The custom width value should be entered in pixels (e.g. 200) for the fields.
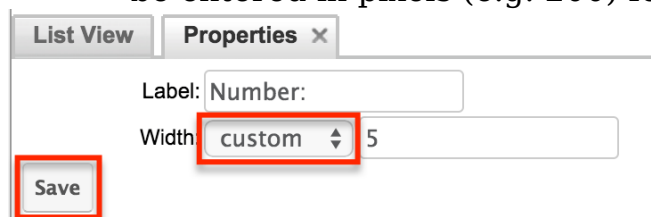
7. Once the layout is finalized, click "Save" to preserve your changes.
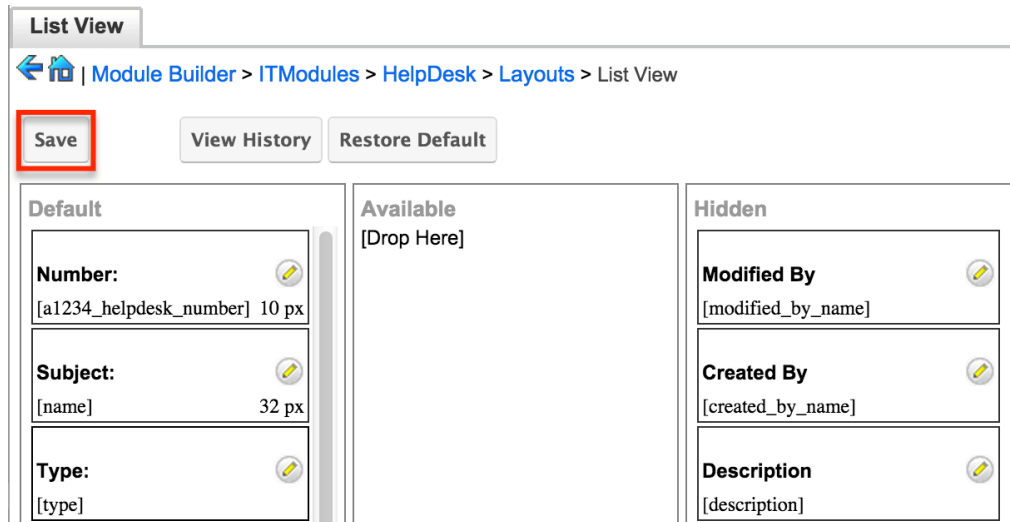
Mobile Layouts

Administrators can also configure the mobile layouts for Sugar Mobile by expanding "Mobile Layouts" for the desired module from the Packages panel. The list of available mobile layouts will display below and you can select the specific layout (e.g. Mobile EditView, Mobile ListView, etc.) you wish to configure.
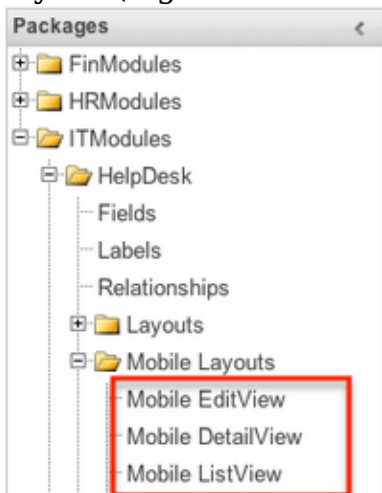
Mobile Layout Types

There are various mobile layouts in Sugar to represent the different areas of the Sugar Mobile application. Please note that not all layouts are available in every module and the different mobile applications will use the information defined here differently.

The following mobile layouts are available in Sugar:

- **Edit View** : Edit view layout is used in Sugar to modify or create records in

the specified module.

- **Detail View** : Detail view is used in Sugar to view the current data for a record within the specified module. Certain fields are translated to Sugar Mobile as buttons instead of data. For example, instead of seeing the phone number, there is a phone icon to be able to call the number on the record.
- **List View** : List view layout is used in Sugar to view multiple records within the specified module. Only the first two fields in the list view section will be displayed in Sugar Mobile.

Mobile Layout Options

Administrators have the ability to configure the various layouts available via Module Builder. Please note that the mobile layouts can be configured via Admin > Studio as well once the module has been deployed. For more information on configuring layouts, please refer to the [Studio](#) documentation.

The following are some of the available options when configuring mobile layouts via Module Builder:

- **View History** : Sugar preserves a history of the changes made to each layout. Click "View History" and the History dialog box will display the timestamp of when changes occurred and allow you to preview the layout then restore if you wish. For more information on viewing the history of layouts, please refer to the [Viewing Layout History](#) section of this page.
- **Restore Defaults** : Sugar provides the option to restore a layout to its original default configuration. For more information on how to restore the default layout, please refer to the [Restoring Layout Defaults](#) section of this page.
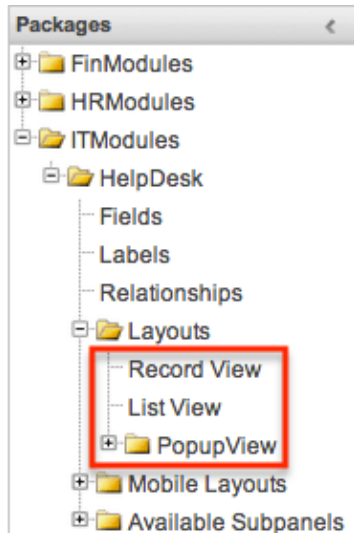
Editing Mobile Layouts

You can add, remove, hide, etc. the fields for the available layouts in "Mobile Layouts" by selecting the specific layout under the Packages panel to edit. Please note that the Mobile EditView and DetailView layouts are modified in similar fashions. The Mobile ListView layout has columns where you can designate fields users can and cannot see.

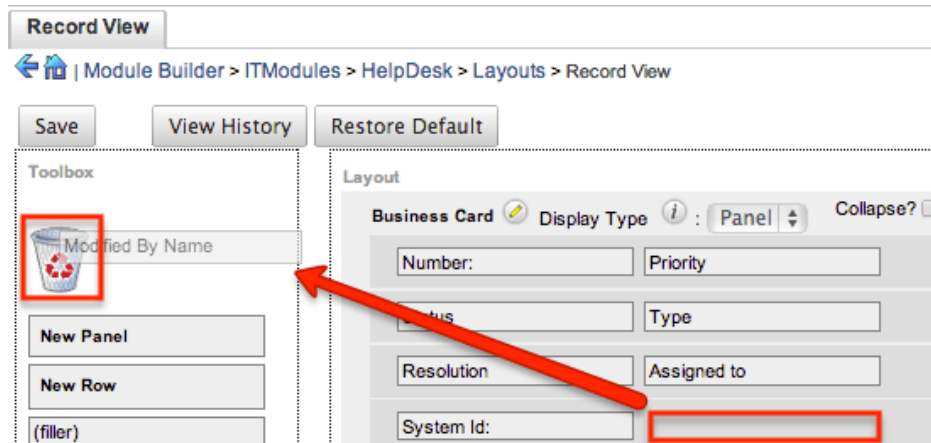The following steps cover editing the Mobile EditView layout as an example:

1. Expand "Mobile Layouts" from the Packages panel under the desired module and select "Mobile EditView". The selected layout will display in the main panel to the right.

2. To add a field to the Mobile EditView layout, drag the field from the list of fields in the Toolbox to a "(filler)" location on the layout per your preference.
    ○ You can also drag a field to a location on the layout that already has a field in place. The newly added field and the existing field on the layout will swap places.


3. To remove a field from the layout, drag and drop the field from the layout to the trash bin in the Toolbox to remove the field from the layout. You may remove an entire row in the layout using the same method.
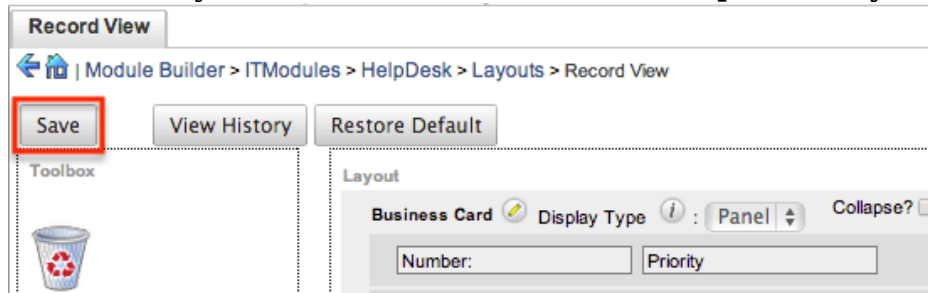
4. To add a new row, drag the "New Row" item in the Toolbox to the layout to allow additional fields or blank spaces to be added.

5. Once the layout is finalized, click "Save" to preserve your changes.

Unlike the Mobile EditView layout, the Mobile ListView layout has columns were you can designate fields users can and cannot see. When configuring the Mobile

ListView layout, you will see three columns (Default, Available, Hidden) where fields can be dragged and dropped accordingly.

- **Default** : This column contains fields that are displayed on the list view.
- **Available** : Available fields are fields that will not show by default in the layout, but if the layout can be personalized, users can add these fields to their view of the layout. Not all list type layouts have an available fields section.
- **Hidden** : This column contains fields that will not be displayed on the list view.

The following steps cover editing the Mobile ListView layout as an example:

1. Expand "Layouts" from the Packages panel under the desired module and select "Mobile ListView".
2. To add a field to the Mobile ListView layout, drag and drop the fields from the Hidden column to the Default column.
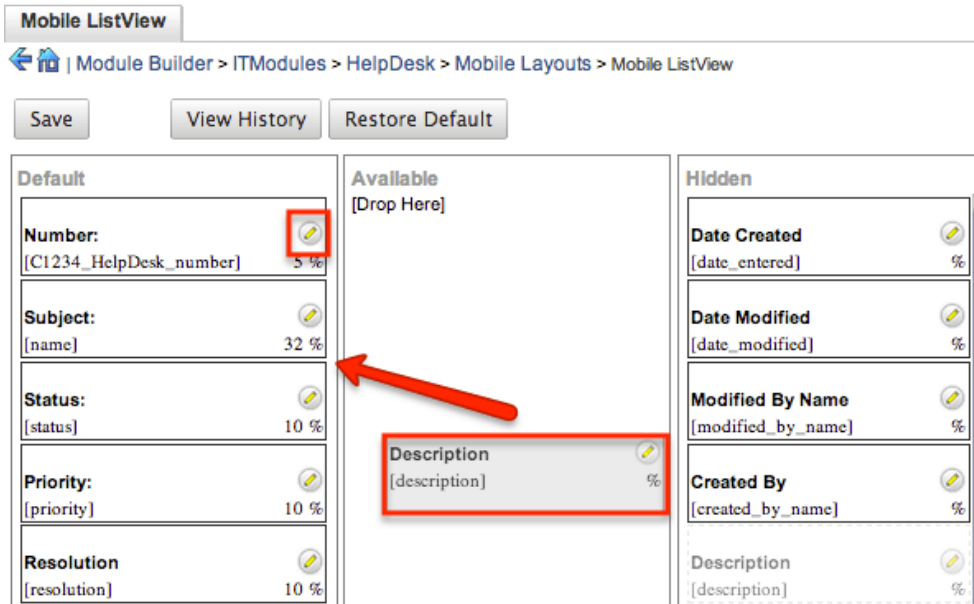
3. Click the Pencil icon to modify the label of the field as well as the width percentage the field will take up in the list view. Please note that the modified label will display in all List View layouts in Sugar Mobile.
4. Once the layout is finalized, click "Save" to preserve your changes.

Available Subpanels

Related records between modules in Sugar are commonly displayed in Subpanels. Similar to list type layouts, administrators can modify the available subpanel layouts to change which fields are shown in a module's subpanel. You can add or remove fields for these subpanels depending on the information that you want to display to users. To access the subpanels section in Module Builder, expand

"Available Subpanels" from the Packages panel under the desired module. The available subpanel for the selected module will appear to the right of the screen.
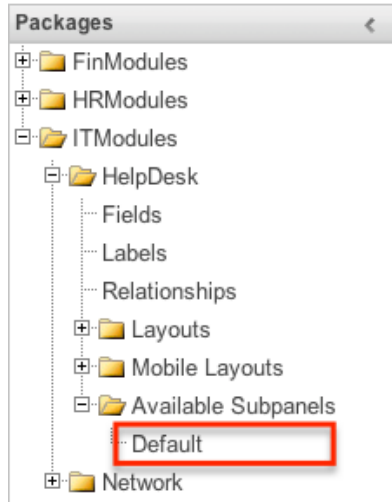
Subpanel Options

When configuring the Subpanel layout in Module Builder, there are some available options that allow you to view historical layout changes as well as restore the default layout. Please note that the subpanel layout can be configured via Admin > Studio as well once the module has been deployed. For more information on configuring layouts, please refer to the [Subpanels](#) section of the Studio documentation.

- **View History** : Sugar keeps a history of the changes made to each subpanel. These changes and when they occurred can be viewed and restored via "View History". For more information on viewing the history of subpanels, please refer to the [Viewing Layout History](#) section of this page.
- **Restore Defaults** : Sugar also contains the ability to restore a subpanel to its original default configuration. For more information on how to reset a subpanel to default, please refer to the [Restoring Layout Defaults](#) section of this page.
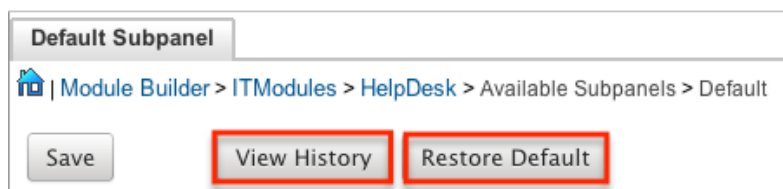
Editing Subpanel Layout

Use the following steps to modify a subpanel via Module Builder:

1. Expand "Available Subpanels" from the Packages panel under the desired module and select the subpanel you wish to edit. The selected subpanel layout will display to the right in the main panel.
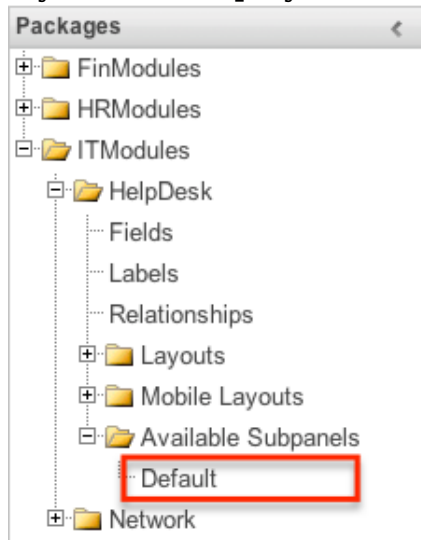
2. To add a field to the Subpanel layout, drag and drop the fields from the Hidden column to the Default column.
    ◦ You can drag the field up and down the list to change the position of the field in the subpanel.
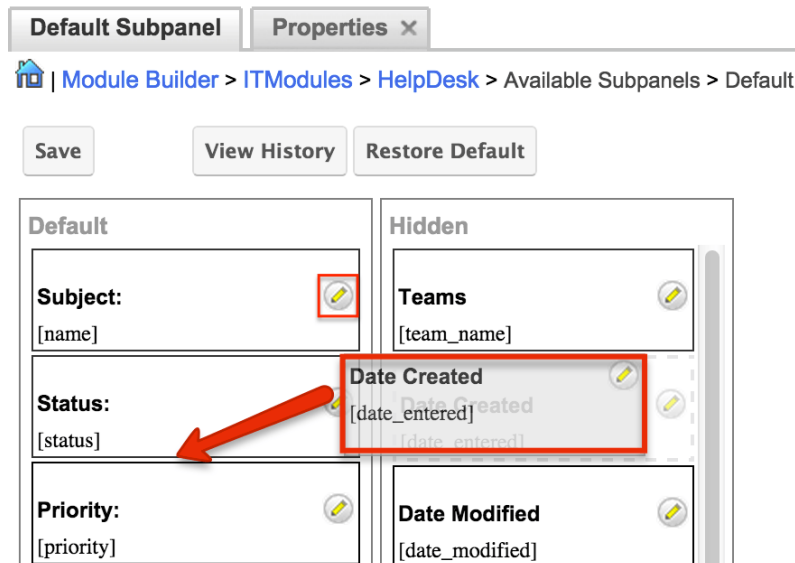
3. To remove a field, drag and drop the fields from the Default column to the Hidden column.
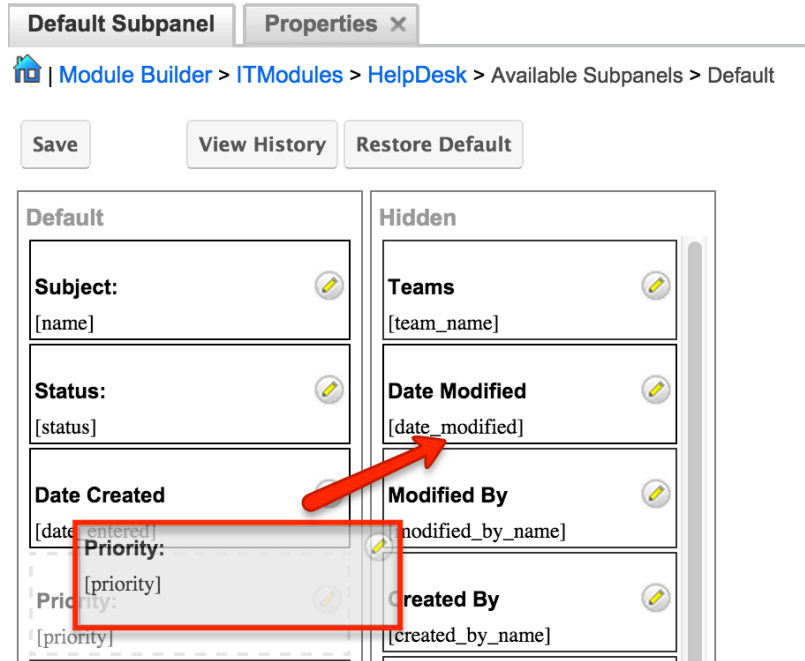
4. Click the Pencil icon to change the column width of the field in the subpanel.
   - **Note**: Administrators can choose from a pre-defined list of width sizes (e.g. default, small, medium, etc.). Please note that selecting the Default width will set the list view column to equal the Medium width size. Selecting "custom" from the list will allow you to enter a custom width value in the open box. The custom width value should be entered in pixels (e.g. 200) for the fields.
   - When defining the column width for currency fields (e.g. Likely, Best, etc.), only "large" and above applies because there is a minimum width requirement in Sugar for this field type. In addition, when defining a custom width for currency fields, the value must be 141px or wider.
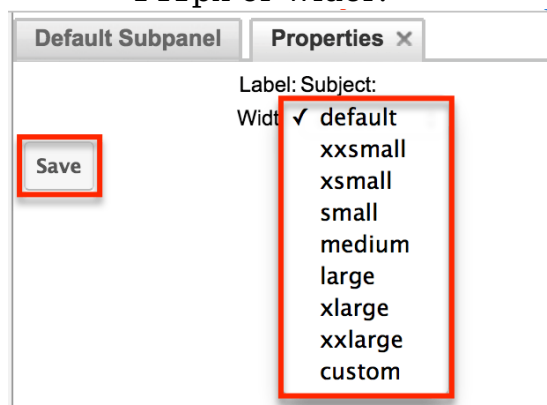
5. Once the subpanel layout is finalized, click "Save" to preserve your changes.
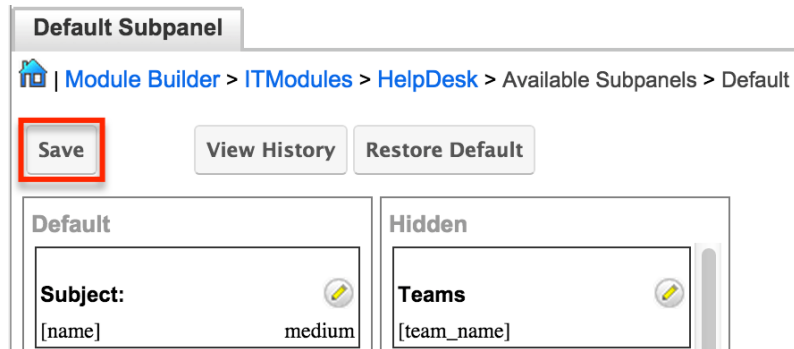
Using Sugar Logic

Sugar Logic allows administrators to write simple formulas and logic checks to provide a calculation for a field or to set the visibility of a field. A formula specifies one or more field values along with operators and functions that are mathematical or logical. When you execute a formula, Sugar performs the calculation to derive the value. When a field is used in a formula, Sugar recalculates the value whenever a user updates it and saves the record. Similarly, if you update a formula, Sugar recalculates the field value based on the updated formula. For the complete list of Sugar Logic functions and how to use them, please refer to the Studio documentation.

For more information regarding the types of fields that support the use of Sugar Logic, please refer to the Field Options section of this page.

Viewing Layout History

Layouts, subpanels, and mobile layouts keep a history of the last ten changes made to each layout. To view the history for any of these layouts, simply click "View History" on the layout editor view in Module Builder.
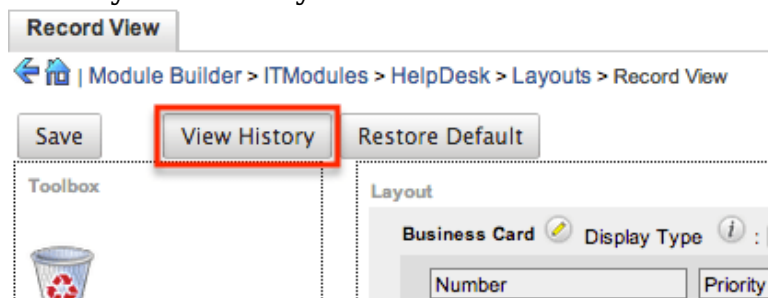
The History dialog box will open up displaying the timestamps of when changes occurred and allow you to preview the layout by clicking the Preview button.

The preview will show the details of the layout as of the specific time it was saved. To restore the layout to the particular version you are viewing, simply click the Restore button from under the Preview tab or in the History dialog box. The restored layout will load into the layout editor allowing you to make any additional changes as necessary. Click "Save" to preserve your changes.

Restoring Layout Defaults

Many layouts, subpanels, and mobile layouts can be restored to their original default configuration. To restore the default for any of these layouts, simply select "Restore Default" from the edit layout screen in Module Builder.

The default layout will load into the editor allowing you to make changes as necessary. Click "Save" to preserve your changes.

Deleting Modules

If a module is invalid or should no longer appear in a package, it may be deleted from Module Builder. Please note that deleting a module from a package will not remove the module from any instances where the package was deployed. For more information on how to uninstall a deployed package from an instance, please refer to the [Module Loader](#) documentation.
Use the following steps to delete a module from a package via Module Builder:

1. Select the desired package and module from the Packages panel or the main panel.
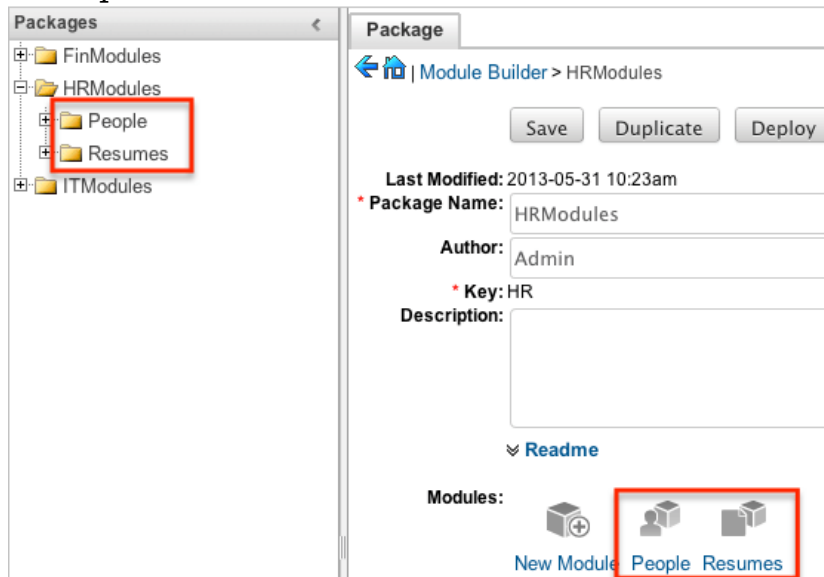
2. Click "Delete" to remove the module.
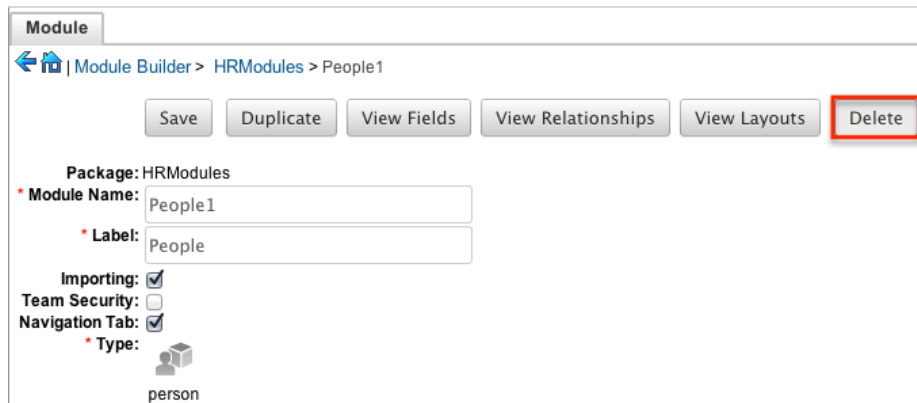
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

Last Modified: 2020-11-30 17:17:29

Module Loader

Overview

Module Loader is used to install a variety of custom file packages, including custom modules, into a Sugar instance. Using Module Loader, you can also manage and uninstall these packages, all done through Sugar's user interface. Packages are uploaded as a ZIP file from an administrator's local computer and then, when deployed, will force changes upon the instance's filesystem and database.

Custom module packages can be created and modified in [Module Builder](), and then, after deployment, they will show in Module Loader. They can also be exported from Module Builder in one instance, and then uploaded to another instance via Module Loader.

Module Loader Layout

Module Loader consists of three panels. The panels include all necessary information about the packages, and also include different action buttons, explained in [Module Loader Fields](). The panels are:

- **Installed Packages :** This panel shows all installed packages. On this panel, you have the option to uninstall or disable installed packages. After installation, the packages will move from the Uploaded Packages panel to this panel.

    Module Loader

    The following extensions are installed on this system:

Name		Action	Enable/Disable	Type
Dashboard Manager		Uninstall	Disable	module

- **Module Upload :** This panel consists of an upload option where files can be uploaded to Sugar via a browser file selection window. Please review [Uploading Modules]() for more information on using this panel.

    Module Choose File No file chosen   Upload

- **Uploaded Packages :** This panel shows all packages that have been uploaded to Sugar, but have not yet been installed, or have been uninstalled. Packages can be installed or deleted from Sugar using this

panel.

Module Loader Fields

Module Loader contains different fields on the [Installed Packages and Uploaded Packages panels](). Each set of fields show relevant and identifying information about the module package.

The Installed Packages panel consists of the following fields:

Field	Description
Name	The name of the package, pulled from the manifest.php file of the package
Action	Button allowing you to uninstall the package from your Sugar instance if the package is marked as uninstallable in the manifest.php file of the package
Enable/Disable	Button allowing you to enable or disable the functionality of the package without uninstalling **Note**: Always perform a [Quick Repair and Rebuild]() after disabling and then re-enabling a package via Module Loader.
Type	Describes the type of package, pulled from the manifest.php file of the package
Version	The version of the package pulled from manifest.php file of the package
Date Installed	The date and time that the package was installed
Description	The description of the package pulled from the manifest.php file of the package

The Uploaded Packages panel consists of the following fields:
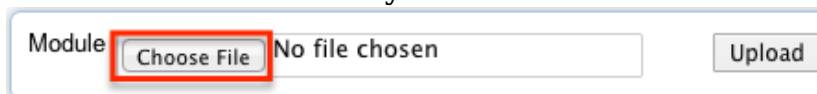
Field	Description
Name	The name of the package pulled from

	the manifest.php file of the package
Install	Button allowing you to install the package to your Sugar instance
Delete	Button allowing you to delete the package from your Sugar instance
Type	Describes the type of package, pulled from the manifest.php file of the package
Version	The version of the package, pulled from manifest.php file of the package
Date Published	The date and time that the package was initially created from the publisher
Uninstallable	Tells you if the package is uninstallable from the manifest.php file of the package
Description	The description of the package pulled from the manifest.php file of the package

Uploading Packages
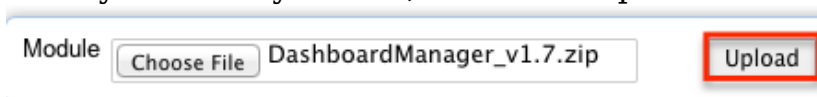
After receiving the file that you would like to install, you must first upload it to your Sugar instance. To upload a file, follow the following steps:

1. Navigate to Admin > Module Loader
2. Click the "Choose File" button in the Module Upload panel to open a file selection window from your browser

3. Select the file from your local computer
4. After you select your file, click the "Upload" button to complete the process

5. After it has been uploaded, the package will show in the Uploaded Packages panel
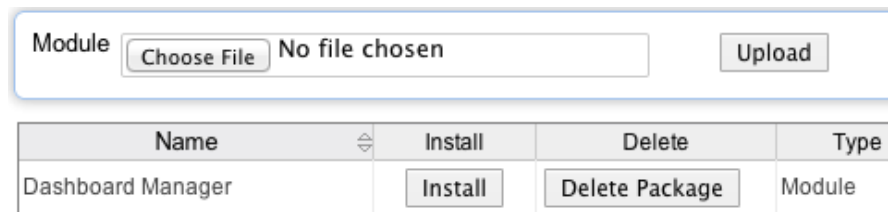
It is also possible to upload packages using a REST API endpoint. Refer to the
[Developer guide](#) for more information.

Installing Packages

After uploading a package to Module Loader, it must be installed for the package's
contents to take effect on your instance. To install a package, follow the following
steps:

1. Follow the steps to [upload your package](#) to Module Loader.
2. Click the "Install" button on the Uploaded Packages panel.

3. You will be brought to the installation screen to confirm that the packages
   should be installed and to read and accept any license or readme
   documentation as needed. Click "Commit" when ready to run the
   installation.
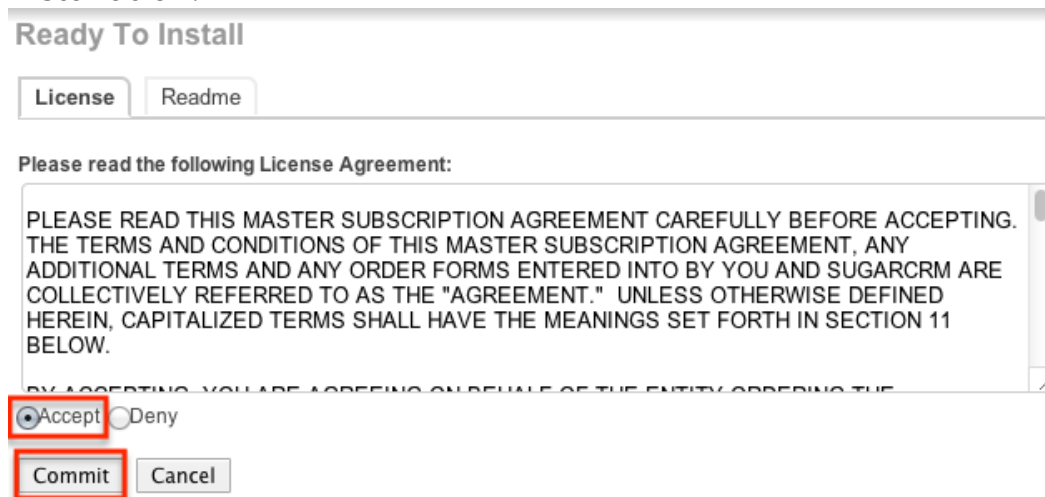
4. The next page will show a progress bar and a completion notice. If there
   are any errors, they will be displayed with a verbose explanation of what
   went wrong. If not, click "Display Log" to show what happened during the
   installation process.
     - **Note:** To sustain the stability, security, and integrity of Sugar's
       cloud service environment, all installed packages are scanned to
       check for code not conforming to environmental agreements. Any
       package that fails this scanner will not be installed and the installer

will produce a reason for the failed installation. If this happens, please contact the developer of your package for more information.

5. Click "Back to Module Loader" when complete to return to Module Loader. If you do not need to install any further packages, you can navigate to any other section of Sugar as need be.
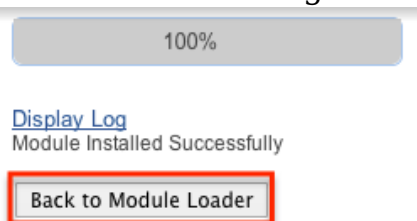
It is also possible to install packages using a REST API endpoint. Refer to the Developer guide for more information.

Uninstalling Packages

After a package has been installed in your Sugar instance, it can be removed if it is no longer needed. When uninstalled, the package will remove any available customizations to your instance from the filesystem and database. Any legacy workflows based on the module will also be deleted.

Note: Packages have to be defined as "Uninstallable" in the manifest.php file of the package to be able to be uninstalled.

To uninstall a package, perform the following steps:

1. Navigate to Admin > Module Loader.
2. Locate the package you would like to uninstall in the Installed Packages panel.
3. Click the "Uninstall" button.
   - **Note:** If you do not see an Uninstall button next to your package, it may be caused by one of the following circumstances:
     - There may be a newer version of the package installed that has an Uninstall button and that package must be uninstalled first.
     - The manifest.php file may not define the package as uninstallable.
     - The package may be missing files that are critical to performing the uninstall.
4. If the package has added any database tables to your instance, you will see

a selection whether to remove or retain the database tables. If the database tables include any information you would like to keep, select the "Do Not Remove Tables" option. An example of this would be if you are uninstalling a custom module but will be reinstalling a new version of the same module. You would want to keep the data but remove any files associated with the old module that will be replaced with the new package.

5. Click "Commit" when you are ready to uninstall the package.

Ready To Uninstall

[Commit] [Cancel]

◉ Remove Tables ○ Do Not Remove Tables
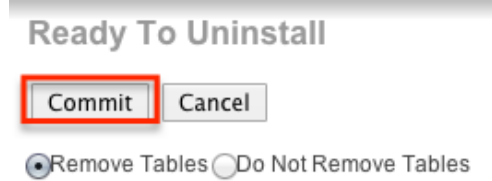
6. The next page will show a progress bar and a completion notice. If there are any errors, they will be displayed with a verbose explanation of what went wrong. If not, click "Display Log" to show what happened during the uninstall process.

7. Click "Back to Module Loader" when complete to return to Module Loader. If you do not need to uninstall any further packages, you can navigate to any other section of Sugar as need be.

100%

Display Log
Removing for dash_DashboardBackups
Removing for dash_DashboardBackups
Removing for dash_DashboardBackups
Removing for dash_DashboardBackups
Removing for dash_DashboardBackups
Removing for dash_DashboardBackups
Removing for dash_DashboardBackups
Removing for dash_DashboardBackups
Removing for dash_DashboardBackups
Removing for dash_DashboardManager
Removing for dash_DashboardManager
Removing for dash_DashboardManager
Removing for dash_DashboardManager
Removing for dash_DashboardManager
Removing for dash_DashboardManager
Removing for dash_DashboardManager
Removing for dash_DashboardManager
Removing for dash_DashboardManager

Complete
Module Uninstalled Successfully

[Back to Module Loader]

8. After the package has been uninstalled, it can be deleted from your instance via the Uploaded Packages panel.

Name		Install	Delete	Type
Dashboard Manager		Install	Delete Package	Module

It is also possible to uninstall packages using a REST API endpoint. Refer to the

[Developer guide](#) for more information.

Last Modified: 2021-07-16 17:24:18

Workflow Management

Overview

Sugar's Workflow functionality allows administrators to configure cause-and-effect type actions throughout Sugar and across multiple modules. Workflows can be used to update fields, send emails, or create records when certain conditions are met. Workflows are a great way to configure automated processes within Sugar so that users do not need to remember manual steps and instead can focus on their primary tasks and job responsibilities.

All workflow conditions are reached and checked for once a record is saved. Workflows can be configured to either start their process to perform the job the moment the save occurs, or they can be delayed for a given amount of time.

The following save events can trigger a workflow to fire:

- Manually saving a record
- Mass updating records
- [Importing](#) records
- Another workflow updating a record
- Reassigning Records via [User Management](#)
- Updating or creating a record via [plug-ins](#)
- Updating or creating a record via [Sugar mobile applications](#)
- Updating or creating a record via the [Web Services](#)

Workflows can be viewed and configured by any System Administrator User. In addition, regular users with a role that provides Developer access will be able to access workflows for the module they have the rights to. For more information on Roles, please review the [Roles](#) documentation.

Workflow Fields

The Workflow module contains seven fields that will retain both functional and organizational purposes in Workflows. These fields cannot be edited or added to because of their functional purposes in the workflow process.

Field	Dropdown Options	Description
Applies To	- New and Updated Records - New Records Only - Updated Records Only	Choose if this workflow is going to fire on all saves, when a new record is created, or when an existing record is updated
Description	(Text Area Field, no character limit)	A description of this workflow and its purpose
Execution Occurs	- When record saved - After time elapses	Whether the workflow effects will occur once a record is saved, or if they will be re-checked and occur after a defined amount of time
Name	(Text field, limit of 50 characters)	Identifying name of the workflow
Processing Order	- Alerts then Actions - Actions then Alerts	If your workflow is going to include both email alerts and workflow actions, select which of the two you would like to happen first
Status	- Active - Inactive	When set to Inactive, the workflow will not process
Target Module	(Module List)	A list of all modules in Sugar that are compatible with workflows. Choose which module the primary conditions will be triggered from

Workflow Module Tab

The Workflow Definitions module tab is typically located on the navigation bar at the top your Sugar screen after navigating to Admin > Workflow Management. Click the tab to access the Workflows list view. You may also click the triangle in the Workflow Definitions 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 workflow definitions you last viewed in the module.
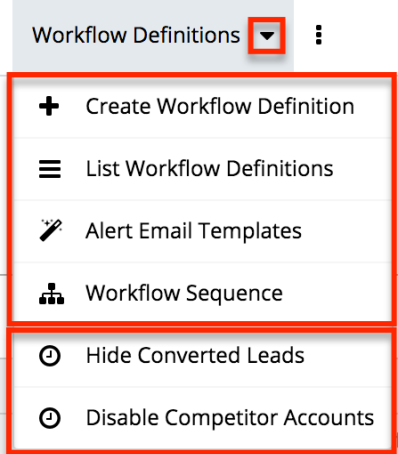
The Actions menu allows you to perform the following operations:

Menu Item	Description
[Create Workflow Definition](#)	Opens the edit view layout to create a new workflow
[List Workflow Definitions](#)	Opens the list view layout to search and display workflows
[Alert Email Templates](#)	Opens the Alert Template menu to allow you to create, view, and edit existing alert email templates
[Workflow Sequence](#)	Opens the Workflow Sequence menu to allow you to reorganize the processing order of your workflows for each module

Creating Workflows

Workflows are created by accessing the Admin menu, navigating to the Developer Tools section and then clicking on the link for Workflow Management.

Once on the Workflow Management module, you can create a new workflow or

duplicate an existing one. The process of creating workflows contains four main sections. First, the workflow itself must be created. This creation process will include the name of the workflow, as well as the rest of the values for the fields listed in the [Workflow Fields](#) section of this documentation. After the workflow has been saved, the next step will be to configure the [Workflow Conditions](#), which defines what will cause the workflow to happen, or its triggers. Finally, the [Workflow Alerts](#) and [Workflow Actions](#) must be configured. These define what the workflow will do to Sugar records or what emails will be sent out after triggered.

Creating Via Workflow Module

The most common method of workflow creation is via the Create Workflow Definition option in the Workflow Management module. This opens up the edit view layout which allows you to enter in all the relevant information for the workflow.

Use the following steps to create a workflow via the Workflow Management module:

1. Navigate to Admin > Workflow Management.
2. Click the triangle in the Workflow Definitions tab to open the Actions menu and select "Create Workflow Definition".
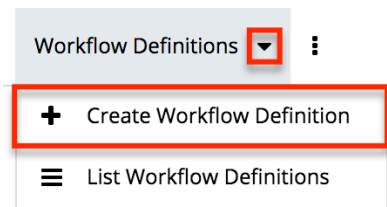
3. Enter appropriate values for the [fields](#) in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
4. Once the necessary information is entered, click "Save".
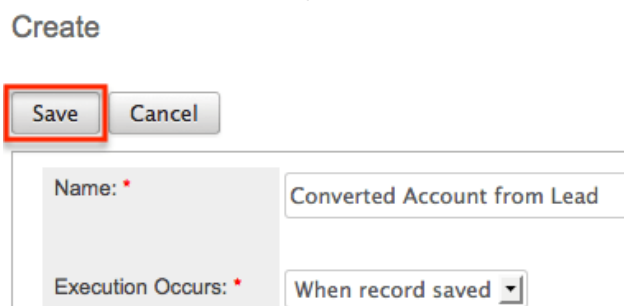
5. Define the conditions of the workflow that will trigger the workflow to process as described in [Creating Workflow Conditions](#).

6. Define what will happen when the workflow is processed as described in [Creating Workflow Alerts](#) and [Creating Workflow Actions](#).

Creating Via Duplication

You can also create a new workflow definition by duplicating an existing workflow record. The duplicate option is useful if the workflow you are creating has similar information, conditions, and alerts and actions to an existing workflow as all of these are copied over during the duplication process.

Use the following steps to create a workflow definition by duplicating an existing record:
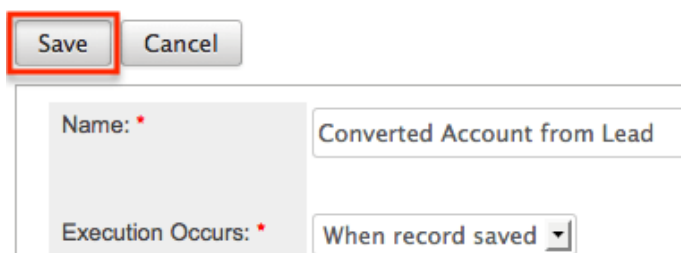
1. Navigate to a workflow definition's detail view.
2. Click the Actions menu and select "Copy".
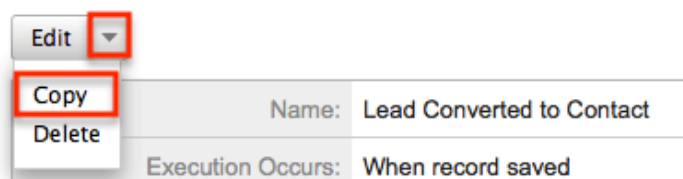
3. The displayed edit view is pre-populated with the values of the original workflow. Update the necessary fields then click "Save".

Creating Workflow Conditions

Workflow conditions are an essential function when creating workflows. Workflow Conditions define the "cause" side of the workflow's cause and effect type functionality. At least one condition must exist for a workflow to trigger. If more than one conditions exist, they all must be fulfilled for the workflow to trigger.

Use the following steps to create a workflow condition:

1. Navigate to the detail view of the workflow.
2. Click "Create" on the Conditions subpanel to open a popup box with the different condition possibilities.

When these conditions are met:

Conditions

Create

Description:

3. Follow the prompts in the popup to create the different conditions, as described below. Once complete, click "Save" and the condition will be added to your workflow definition.
4. Repeat this process as necessary to add additional conditions.
5. After the condition has been created, it will appear in the conditions subpanel.

Note: The available conditions will vary depending on the execution type ("When record saved" or "After time elapses") you have chosen for the workflow.

Creating "After Time Elapsed" Workflow Conditions

Before creating workflows with time-elapsed conditions, please take note of the following:

- The system's Process Workflow Tasks scheduler must be enabled and running as often as possible for time-elapsed workflows to work. For more information, please refer to the Schedulers documentation.
- When a time-elapsed condition is used on a workflow definition, the Date Modified and Modified By fields will change on the records affected by the workflow's action(s). The Modified By user will be the admin user with ID = 1 (usually "Administrator") and the Date Modified will reflect the date and time that the action occurred in the system.
- The time intervals (e.g. 0 hours, 4 hours) available when setting up time-elapsed conditions can be configured via Admin > Dropdown Editor. For more information on configuring the time intervals, please refer to the Developer Tools documentation.

The "After time elapsed" workflow condition options are different for the first condition and subsequent conditions. This is to ensure that your time-based condition is recorded. After that, you can set additional conditions to filter the records from which the workflows will fire.

When used as the first condition of a workflow, the "After time elapsed" options

are as follows:

- **When a field in the target module changes to or from a specified value :** You will be asked to specify a specific field within the module, and its value. Then, you will select the amount of time after the change that, after this threshold, the workflow will fire.
- **Field does not change for a specified amount of time :** You will be asked to specify a specific field within the module and a timeframe. After the field changes, if it does not change again in the given timeframe, the workflow will fire.

When used as subsequent conditions of a workflow, the "After time elapsed" options are the two mentioned above as well as two additional options:

- **When a field in the target module contains a specified value :** This condition is used to filter records that should or should not be included in the workflow. You will be asked to specify a field and the value of the field, and if you want to include records where the field is a specific value, or if it is not a specific value. These conditions will vary by which field is chosen.
- **When the target module changes and a field in a related module contains a specified value :** This condition is used to filter records based on their related records. You will be asked to specify which relationship you would like to the workflow to look at, and which field and value should or should not be used when triggering the workflow.

Creating "When Record Saves" Workflow Conditions

The "When record saves" workflow condition options are as follows:

- **When a field in the target module changes to or from a specified value :** This option can be used to specify both the new value of a specific field to trigger a workflow, and also what the previous value was. You will be asked to specify the specific field and the new value after save to use this condition. The previous value is not required.
- **When the target module changes :** This option will cause the workflow to trigger when any change to the record takes place.
- **When a field on the target module changes :** This option will cause the workflow to trigger when there is any change to a specific field, regardless of what the change is.
- **When a field in the target module contains a specified value :** This condition is used to filter records that should or should not be included in the workflow. You will be asked to specify a field and the value of the field, and if you want to include records where the field is a specific value, or if it is not a specific value. These conditions will vary by which field is chosen.
- **When the target module changes and a field in a related module**

contains a specified value : This condition is used to filter records based on their related records. You will be asked to specify which relationship you would like to the workflow to look at, and which field and value should or should not be used when triggering the workflow.

Creating Workflow Alerts

Workflow alerts are one of the possible effects of workflow's cause and effect type functionality. These can be used with or without [workflow actions](). Workflow alerts, when triggered by the workflow condition, will cause an email to be sent to a specified recipient. These recipients include Sugar users or individuals related to the target module. To create a workflow alert, follow the following steps:

1. Navigate to the detail view of the workflow.
2. Click "Create" on the Alerts subpanel, which will bring you to the alert setup page.

These operations will be performed:

Alerts

Create ▾

| Details | Type: | Event Description: |

3. You will be presented with the following fields to populate.

Field	Description
Name	Choose a brief, descriptive name for this alert.
Alert Type	Defaults to "Email", which is the most common usage, but you can choose "Invite" if the alert is going to send an invitation for appointment-based modules.
Source Type	Choose "Normal message" to type a plain-text email message in the Alert Text field, or choose "Custom Template" to select and use a [Workflow Alert Template]().
Alert Text	Enter text that will be sent to the alert's recipients as a simple email message without formatting or variables. **Note:** This field is shown only when the Source Type field contains

	"Normal message".
Custom Template	Select from your available [Workflow Alert Templates](#) for this alert's target module. **Note:** This field is shown only when the Source Type field contains "Custom Template".

4. Enter necessary values for all fields and click Save.

5. On the next screen, click "Create" on the "Alert Recipient List" subpanel to choose your recipients.

Note: The only options that will send to someone other than a Sugar user are "Recipient associated with the target module" and "Recipient associated with a related module".

6. Pick the recipients, select any blue hyperlink text to define any variables, such as who a specified user is, or if the recipient should be sent the email as a "To", "CC", or "BCC" recipient, and then click "Save" to continue.
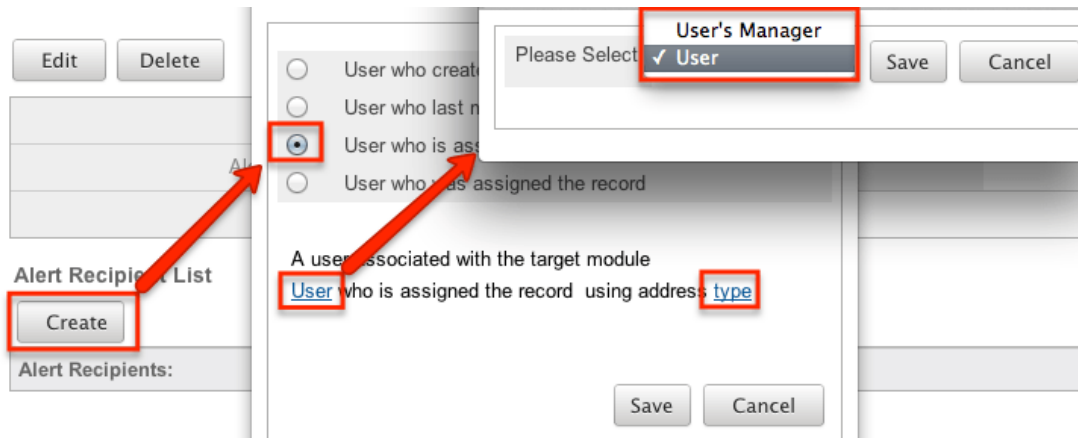
7. Repeat steps 5 and 6 as need be to add additional recipients for this workflow alert.
8. Click the hyperlink for "Send alert to the following recipient" to make any changes, remove any errant recipients with the "Remove" button on the corresponding row, or the "Edit" button on the top left if you need to change any configurations. Once complete, click "Return to Workflow Definition".

9. After the alert has been created, it will appear in the Alert Subpanels.

Creating Workflow Actions

Workflow actions are one of the possible effects of workflow's cause and effect type functionality. These can be used with or without Workflow Alerts. Workflow actions, when triggered by the workflow condition, will cause either updates to existing records or creation of new records. To create a workflow action, follow the following steps:

1. Navigate to the detail view of the workflow that you are working on

2. Click "Create" on the Actions subpanel to open a popup box with the different action possibilities

Actions

Create ▾

| Details | Type: | Event Description: |
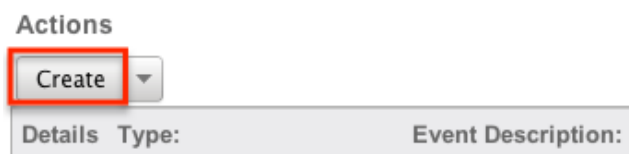
3. Follow the prompts in the popup to create the different actions, as described in Workflow Actions. Once complete, click "Save" and the action will be added to your workflow definition.

4. Repeat this process as necessary to add additional actions.

5. After that action has been created, it will appear in the Actions Subpanel.

Workflow Action Types

There are four options for actions that are available. These options can make updates to the module your workflow is tied to, or a module related to this target module. The options can also create records in related modules or modules related to related modules. The options are as follows:

- **Update fields in the target module :** You will be given the option so select one or more fields within the target module of the workflow, and what the new value or values should be.
- **Update fields in a related module :** You will first be given the option to choose which related module to the target module you would like to update. After selecting the related module, you will select one or more fields within the related module to update, and what the new value or values should be.
- **Create a record in a module associated with target module :** You will be given the option to choose a related module to your target module. This action will create a new record in the related module, such as creating a new call related to an account, where Accounts is the target module. After selecting the module, you will be given the option to populate any or all fields with the related module. Any required fields will be marked with a red asterisk.
- **Create a record associated with a module related to the target module :** This action will take a record, or all records, related to your target module, and create a related record to this middle module. When creating these actions, you are asked to select the related module to your target module, and then select that module's related module where the new

record is going to be created. For example, if your workflow's target module is Contacts, the following screenshot shows how a call will be created and related to the contact's related Opportunity.
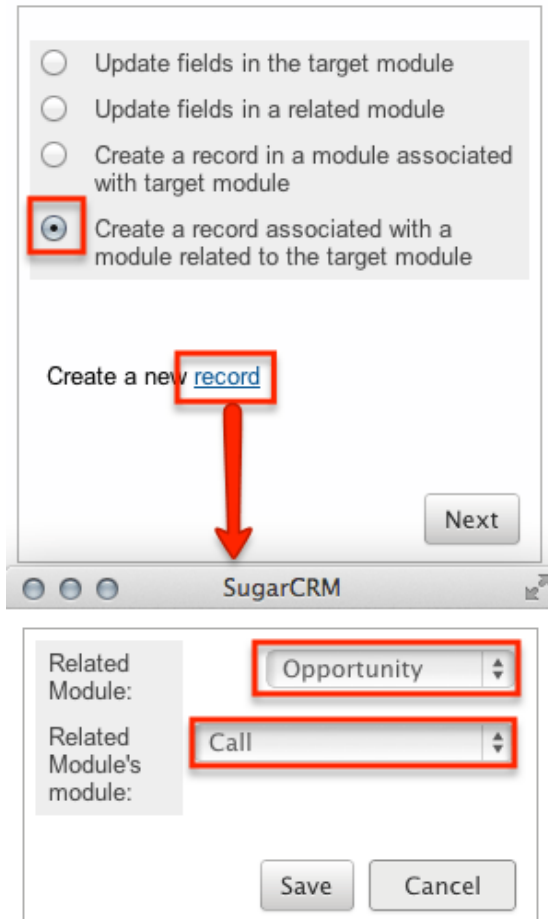
On the next screen, after selecting your modules, you will select one or more fields within the related module to update, and what the new value or values should be. Clicking on the "Advanced Search" button at the bottom of this window will allow you to select if the workflow is specific for all related records (Opportunities), or if the related record should be filtered at all.
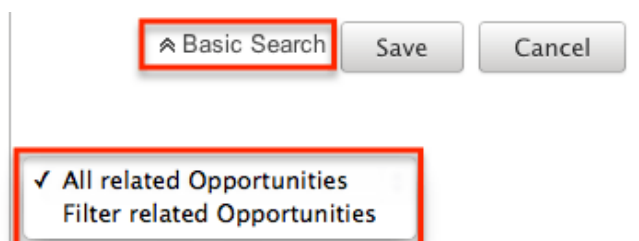
The "Advanced Search" function also contains special functions for specific field types:

- **Assigned User :** Allows you to configure the action to set the assigned user to be either the actual user or the user's manager who either is currently assigned to the triggered record, the one

who most recently updated it, the one who created it, or is the one saving the record.

- **Team ID :** Allows you to configure the action to set the team to be the default team of the user who triggered the workflow or, if it is updating a related record, to match the primary team of the triggered record.
- **Dropdown Fields :** Allows you to configure the action to sequentially move the dropdown option forward or backward in the order in which it appears in the dropdown list.

Viewing Workflows

There are various options available for viewing workflow records in Sugar including via Workflow Definitions list view, Workflow Definitions detail view, and the Workflow Definitions Last Viewed menu. Each method will provide varying degrees of detail and insight into the workflow.

Viewing Via List View

The Workflow Definitions list view displays all records meeting the current search criteria. To access the list view, simply click the Workflow Definitions module tab, which is made available by navigating to Admin > Workflow Management. While list view shows key workflow fields, you can click the workflow definition's name to open the record in detail view. For more information on viewing workflows via list view, please refer to the [Workflows List View](#) section of this documentation.

Viewing Via Detail View

The Workflow Definitions detail view displays thorough workflow information including all workflow fields followed by subpanels showing the Conditions, Alerts, and Actions that process the workflow. The detail view can be reached by clicking a workflow definition's link from the Workflow Definitions list view. For more information on viewing workflows via detail view, please refer to the [Workflow Detail View](#) section of this documentation.

Viewing Via Recently Viewed

As you work, Sugar will keep track of which workflows you have recently viewed. Click the Actions menu in the [Workflow Definitions module tab](#) to see a list of your most recently viewed workflows and click each name to open the workflow definition in detail view.
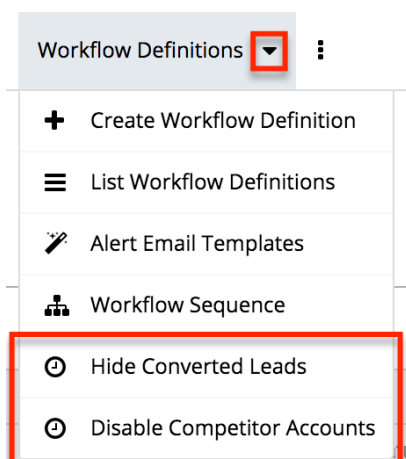
Searching Workflows

The Workflow Definitions list view includes a Basic and Advanced Search to help you locate records easily and effectively. Once the search is performed, the relevant results will be displayed in the Workflows 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. %created). This will pull up any workflow that has the word "created" 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 simplified search experience allowing you to search for just the name of the workflow. 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 criteria from the Name field.
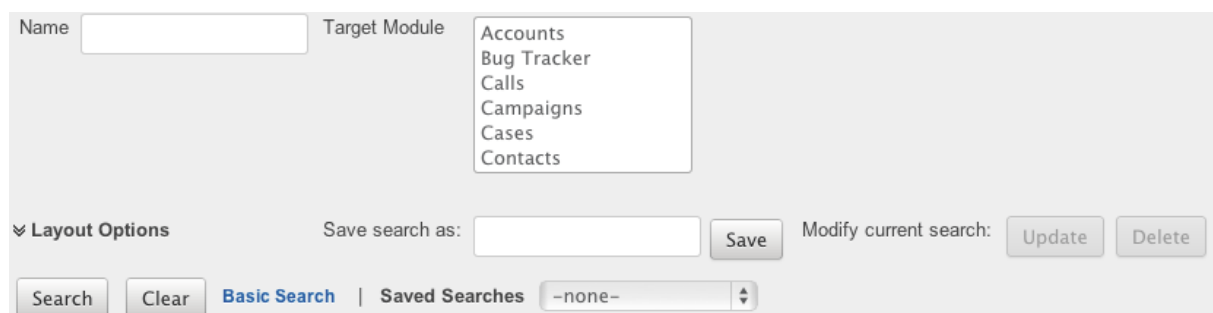
When you run a search, Sugar will return records matching all (as opposed to any) of the fields for which you have given a value. Once the search is complete, the relevant results will populate in the list view beneath the search panel. To see all workflow definitions, simply click "Clear" and then "Search" to perform a blank search with no filters.

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 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.
- **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 the Target Module as "Accounts" or "Contacts" and enter in the word "Created" for the Name search, Sugar will only return workflow definitions with a matching name from the

Accounts or Contacts modules. Once the search completes, the relevant results will populate in the [list view](#) beneath the search panel. To see all workflow definitions, simply click "Clear" and then "Search" to perform a blank search with no filters.

Workflows List View

The Workflows list view displays all workflow definitions meeting the current search criteria. You can view the basic details of each workflow within the field columns. The list view also allows for records to be edited or deleted as need be.

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 the number of records displayed can be changed via Admin > System Settings. For more information on changing the number of displayed records, please refer to the [System](#) documentation.
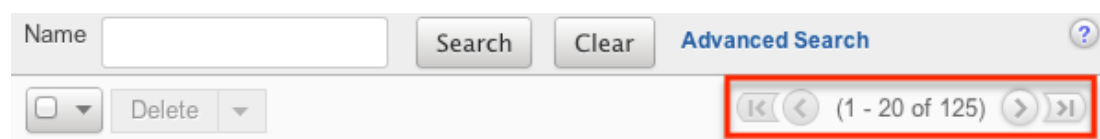
Checkbox Selection

You can delete workflow definitions directly from the list view by first selecting the desired records. To select individual workflows on the Workflow Definitions list view, mark the checkbox on the left of each row. To select or deselect multiple workflow definitions on the list view, use the options in the checkbox dropdown menu:

- **Select This Page** : Selects all records shown on the current page of workflow results.
- **Select All** : Selects all records in the current search results across all pages of workflow results.
- **Deselect All** : Deselects all records that are currently selected.

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.

Workflow Detail View

The Workflow Definition detail view displays thorough workflow information including all workflow fields. You will also see the Conditions, Alerts, and Actionssubpanels beneath the workflow fields. The detail view can be reached by clicking a workflow record's link from the Workflow Definitions list view or from the recently viewed menu.

Actions Menu

The Actions menu on the top left of each workflow definition's detail view allows you to perform various actions on the current record. The action items can be configured to be displayed as separate buttons instead of a dropdown menu via Admin > System Settings. For more information on configuring the actions menu, please refer to the System documentation in the Administration Guide.
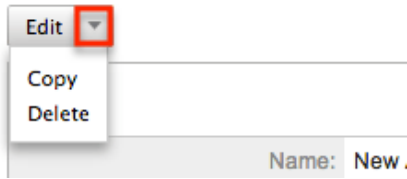
The Options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Edit	Edit this workflow definition
Copy	Duplicate this workflow definition
Delete	Delete this workflow definition

Next or Previous Record

On the upper right of the Workflow Definitions detail view, there are four buttons that allow you to page through each workflow in the Workflow Definition list view's current search results. Clicking the Previous button displays the previous workflow of the current search results while clicking the Next button displays the next workflow of the current search results. The two double-arrow First Page and Last Page buttons allow you to skip to the first or the last workflow of your current results. The text in between shows which workflow result you are currently viewing within the total number of current results.
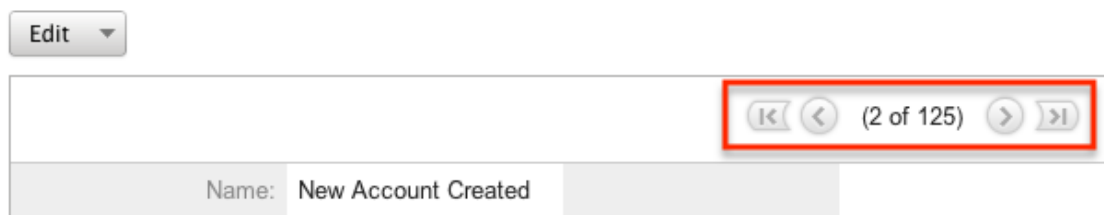
Conditions Subpanel

The Workflow Conditions subpanel allows you to create additional conditions for your workflow and also lets you view and modify the existing ones. The subpanel shows a Description and a Value for each condition. The Description is an automatically generated, brief explanation of the condition. The Value shows what

field or fields are covered in the condition, if not expressly stated in the description. The Conditions subpanel allows the following operations to be performed.

- To view the details or edit a condition, either click the condition's description in the subpanel or click the edit button from the far right of the record's row to open the condition popup.
- To create a new workflow condition, choose "Create" from above the subpanel, then follow the steps supplied in the Creating Workflow Conditions section of this documentation.
- To delete a condition on this workflow, choose "Remove" from the far right of the record's row.

Alert Subpanels

The Workflow Alert subpanel allows you to create additional alerts for your workflow and also lets you view and modify the existing ones. The subpanel displays the "Detail"s, "Type", and "Event Description" for each condition. After an alert has been created, there is also a column for Recipients. The "Event Description" is automatically generated and provides a brief explanation of the alert with the name of the Alert record and what template (if applicable) is being sent to the recipients. The Alerts subpanel allows the following operations to be performed.

- To view or edit an alert, either click the alert's event description or click "Edit" on the far right of the row to open the alert's edit view.
- To view the recipients of the alert, click "Show" from the far left of the record's row. Click "Hide" to collapse the drawer highlighting the recipients
- To edit or add recipients of the workflow alert, click "Recipients". This button will also open the alert's detail view.
- To create a new workflow alert, choose "Create" from above the subpanel, then follow the steps supplied in the Creating Workflow Alerts section of this documentation.
- To delete an alert on this workflow, choose "Remove" from the far right of the record's row.

Actions Subpanel

The Workflow Actions subpanel allows you to create additional actions for your workflow and also lets you view and modify the existing ones. The subpanel shows a Details, Type and an Event Description for each condition. The Event Description is an automatically generated, brief explanation of the action that will be performed by the workflow. The Conditions subpanel allows the following operations to be performed.

- To view the details or edit a condition, either click the condition's description in the subpanel or click the edit button from the far right of the record's row to open the condition popup.
- To view the actions that will be performed, click "Show" from the far left of the record's row. Click "Hide" to collapse the drawer highlighting the actions.
- To create a new workflow action, choose "Create" from above the subpanel, then follow the steps supplied in the Creating Workflow Actions section of this documentation.
- To delete an action on this workflow, choose "Remove" from the far right of the record's row.

Editing Workflows

Workflows may be edited at any time to update or add information to the definition. You can make changes to existing workflow definitions via the

Workflows edit view. Edit view is available within the Workflows module and includes all of the Workflow fields. It can be accessed either via the detail view or list view. Please note that Conditions, Alerts, and Actions are not edited through the Workflow edit view.

Note: After a workflow has been created, the fields "Execution Occurs" and "Target Module" cannot be edited

Editing Via Detail View

You can edit workflows 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.

New Account Created

Edit ▼	
	Name:	New Account Created
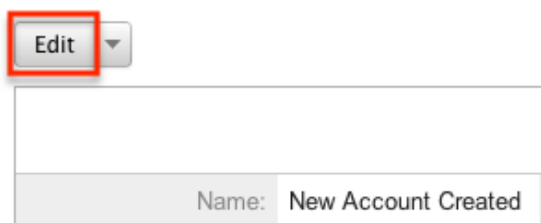
Editing Via List View

You can edit workflows via the list view by clicking the Pencil icon to the left of each workflow's name. The page will navigate to the edit view. Update the necessary fields, then click "Save" to preserve the changes. After saving, you will be brought to the detail view of the workflow.

	Name ⇕	Execution Occurs ⇕	Status ⇕	Target Module ⇕
☐ 🖉	New Account Created	When record saved	Active	Accounts

Deleting Workflows

If a workflow definition is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Workflow Definition's 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 the workflow definition will also remove the conditions, actions, and alerts to stop workflows from firing.

Deleting Via Detail View

Use the following steps to delete a workflow via the detail view:

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

New Account Created

Edit ▼
Copy
Delete

Name: New ⌐

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 workflows via the list view:

1. Navigate to the Workflow Definitions list view via Admin > Workflow Management.
2. Use the Basic or Advanced Search to find the Workflow Definitions you wish to delete.
3. Select the desired records individually or using the checkbox dropdown's options.
4. Choose "Delete" from the Actions menu.

	Delete	Selected: 3	
Name ⇕			Execution Occurs ⇕
☑ ✎	Lead converted to contact		When record saved
☑ ✎	New Account Created		When record saved
☑ ✎	Opportunity moved to Closed-Won		When record saved
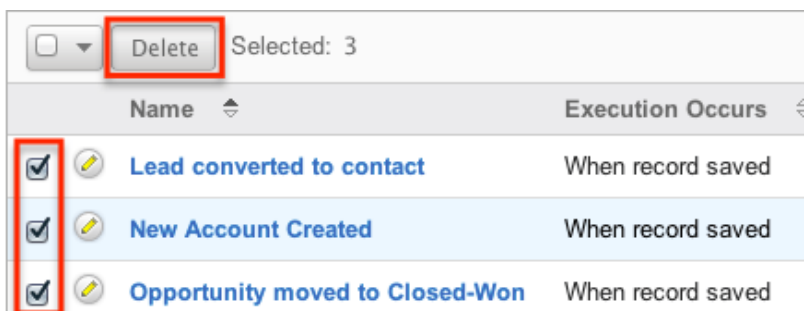
5. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

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

Workflow Alert Templates

When sending a workflow alert, you have the option of sending either a "Normal Message" which will be just a simple, plain text alert, or utilizing a workflow template. Templates have the option to use full HTML editing, to include formatting changes, colors, variables to include data from fields in Sugar, and more.

Alert Template Fields

The Workflow Templates functionality contains several fields that will retain both functional and organizational purposes in Workflows. These fields cannot be edited or added to because of their functional purposes in the workflow process.

Field	Description
Body	This is where you can design your email template using the WYSIWYG (What you See Is What You Get) editor. Click the "Alt Text" checkbox to edit the plain text version of this email. The entry into this box is what will actually be sent to the recipients of the email.
Description	A short explanation of the template and what it is used for.
Field List	Used to select which field from the given module will be inserting into the Variable Insert field to eventually be inserted into the template, which can be changed by updating the Related Module dropdown field.
From Address	What sender's email address will be shown on the email when received by the recipient. **Note:** Mail servers have the functionality to override this setting meaning the email address will show as the one that actually sends this, defined in Admin > System Email Settings. Please review the Emails documentation for more information.
From Name	What sender's name will be shown on

	the email when received by the recipient.
Name	Identifying name of the template.
Related Module	List of modules related to the Target Module, which will change the Field List and, therefore, change the fields that can be used for variables in the email.
Subject	The subject line of the email which will show for the recipients.
Target Module	Selected when creating the template and a non-editable field, this will cause the template show when using the template for workflows made to the corresponding module.
Type	Will only show as workflow, but will vary when making other template types to include Email and Campaign.
Value Type	Select "New Value" or "Old Value" if the variable will be changing on the workflow to determine if the variable should include the value of the field before or after the record is saved.
Variable Insert	This field will build the variable for you based on the Target Module, Related Module, Field List, and Value Type fields.

Creating Alert Templates

Alert Templates are created only via the Workflow module. Alert templates can be created either directly from the workflows module via the Alert Templates page, or via duplication. The Target Module is defined during the creation process, and then a full edit view layout opens including all fields that will be necessary to create the template.

Creating Alert Templates Via Workflows Module

The most common method of template creation is via the Alert Email Templates option in the Workflow Definitions module tab. This will open the edit view layout allowing you to configure the template to your specifications.

Use the following steps to create the template via Workflow Management:

1. Navigate to Admin > Workflow Management.
2. Click the triangle in the Workflow Definitions tab and select "Alert Email Templates".
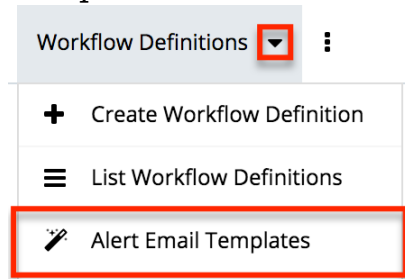
3. Select the module you wish to create the alert template for then click "Create".
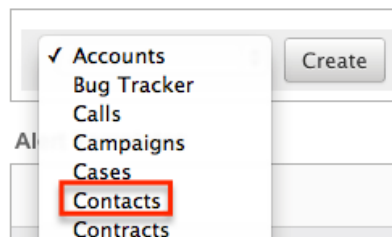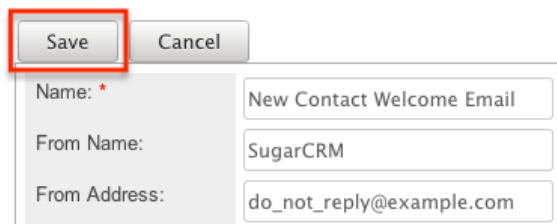
4. Enter appropriate values for the following fields below. Required fields are marked with a red asterisk and must be completed prior to saving.
   - **Name** : Enter a name for the email template.
   - **Type** : Leave as "Workflow".
   - **From Name** : The name that the email recipient will see as the sender.
   - **From Address** : The email address that the email recipient will see as the sender.
     Note: This may be overwritten by your mail server configured in Admin > System [Email Settings](#).
   - **Description** : Enter a description or other information about the template.
   - **Related Module** : To insert a field from a record related to the target module, select the related module.
   - **Subject** : Enter the subject of the email that will be sent.
   - **Body** : Enter the body of the emails that will be sent.
   - **Attachments** : Click the "Choose File" button to open a file selection window from your browser and attach a file. Click the Sugar Document button to attach a file from the sugar database.
5. Populate the template body that will be sent to the email recipients. [Insert variables](#) as necessary for your workflows.
6. 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. For more information on using TinyMCE, please refer to the [User Interface](#) documentation.

Note: 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.

7. Once the necessary information is entered, click "Save" to preserve your changes to the email template.
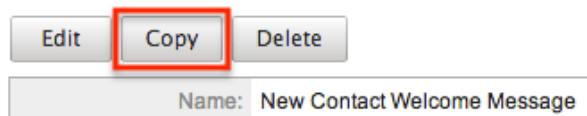
Creating Alert Templates Via Duplication

You can also create a new template by duplicating an existing template. The duplicate option is useful if the template you are creating has similar information to an existing template.

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

1. Navigate to an existing template's detail view.
2. Click the action option for "Copy".
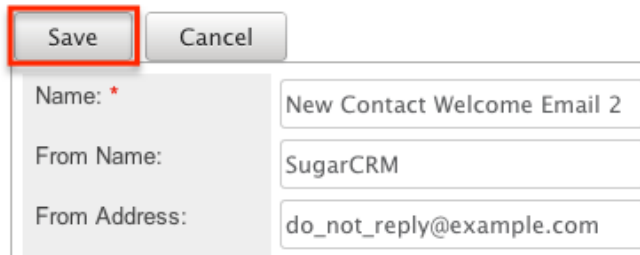
3. The displayed edit view is pre-populated with the original template's values. Update the necessary fields then click "Save".

New Contact Welcome Email
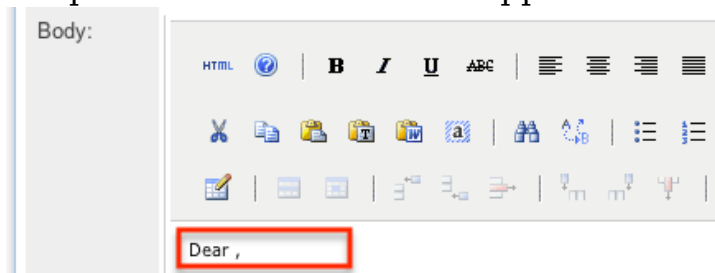
Inserting Variables

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. The variables allow you to insert data from fields within the record that triggered the workflow and its related records into your template. 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.
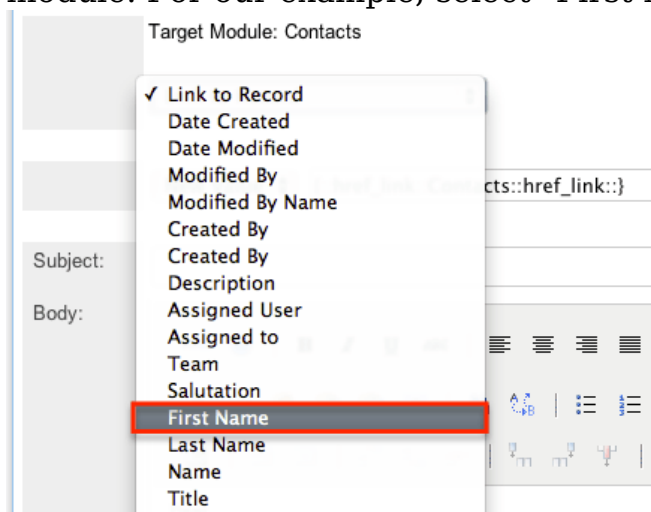
2. Set the variable dropdown to the desired field from the workflow's target module. For our example, select "First Name".

3. Choose between "New Value" and "Old Value" in the value dropdown field.

This will determine if the value of the given variable shown on the template will be the value of the field in question before or after the workflow fired. This functionality is especially helpful if you are showing a change between two values, such as an opportunity moving from new ("Old Value") to closed-won ("New Value"). "New Value" is the default option for this list.

4. Click "Insert" to insert the generated variable name to your subject or body at your cursor's location.
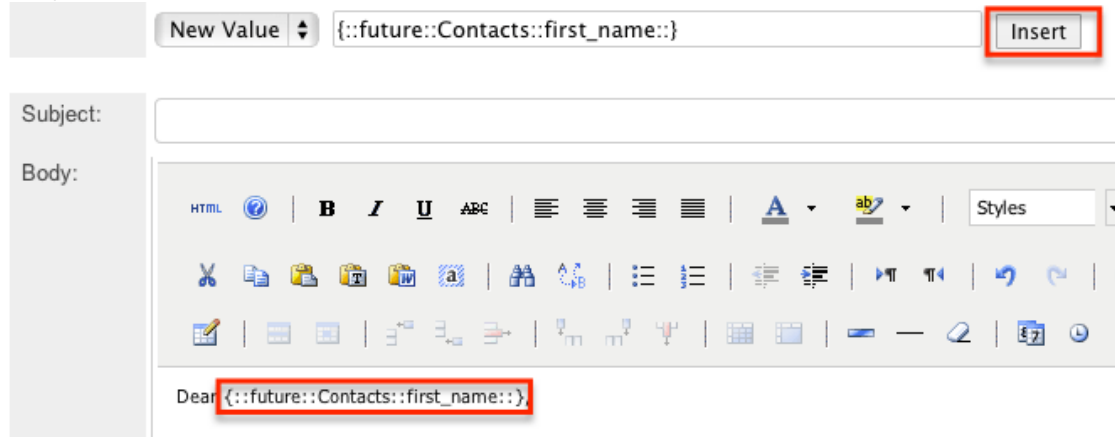
Note: You can click "Alt Text" at the bottom of the page to have the plain text option send differently than the HTML text.

Viewing Alert Templates

There are various options available for viewing workflow templates in Sugar including via Workflow Templates list view, Workflow Templates detail view, and from the Emails module.

Viewing Alert Templates Via List View

The Workflow Templates list view displays all workflow templates and key fields about each template. To access the list view, simply navigate to the Workflow Management section of the Admin menu and select "Alert Email Templates" from the Workflow Definitions module tab. Use the Alert Templates list view for the following functions:

- To open the record in detail view, click the template's name
- To re-sort the list view results one column at a time, click the column header, and the columns will sort alphabetically or chronologically
- Use the arrows in the top right side of the list view navigate through the pages of your templates, or skip to the first or last page using the double arrow buttons
- To delete a template, click "Remove" from the far right of the

corresponding template's row

Viewing Alert Templates Via Detail View

The Alert Templates detail view displays thorough alert template information including all template fields and a preview of the workflow template that recipients will see after it is sent. The detail view can be reached by clicking a template's link from the Alert Templates list view.

While viewing the detail view, the preview of the email template is shown as the last field option. You can also click the "Alt Text" checkbox to see how this email will look when the recipient views it as plain text.

Viewing Alert Templates Via Emails Module

The Emails module contains all of the email templates in Sugar. Alert Templates can be accessed via Emails, in addition to accessing via Workflow Management. To access alert templates via Emails, simply select the View Email Templates option from the [Emails](#) module tab.
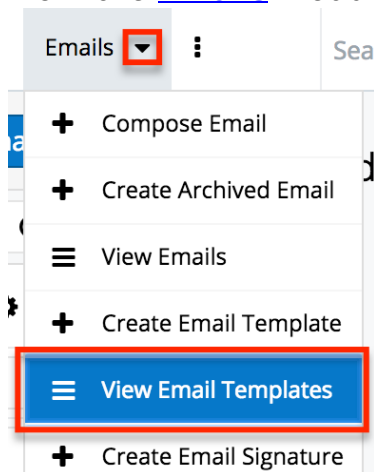
This will bring you to the [Email Templates list view](#) where you can select which template you would like to view. For more information on navigating the Emails module, please review the [Emails](#) module section of the Application Guide.

Editing Alert Templates

Alert Templates may be edited at any time to update or add information to the template. You can make changes to existing templates via the Alert Templates edit view. Edit view is accessible via the Alert Templates detail view. You can edit alert templates 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.

New Contact Welcome Message
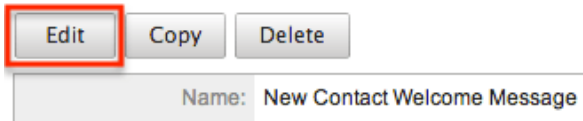
Deleting Alert Templates

If an alert template is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from either the Alert Templates detail view or list view. Deleting alert templates will not delete any workflows using them. If a workflow is utilizing a template which you are deleting, it is recommended that the workflow be updated to include a new template on the alert.

To delete a template from the template's detail use the following steps:

1. Navigate to the Alert Templates detail view.
2. Click the Delete button.

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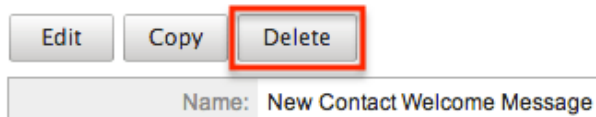
3. A pop-up message will display asking for confirmation. Click "Ok" to proceed.

To delete a template from the list view, use the following steps:

1. Navigate to the Alert Templates list view.
2. Select the "Remove" button on the row of the template you would like to delete.

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

Time Intervals for Time Elapsed Workflows

Time elapsed workflows trigger after a specified amount of time has passed from when the record was saved. Users with administrator or developer access have the ability to add new time intervals to the dropdown list ("tselect_type_dom") used for time elapsed workflows. The time interval dropdown list can be viewed and edited via Admin > Dropdown Editor. For more information on Dropdown Editor, please refer to the [Developer Tools](#) documentation.

By default, the time intervals are:

4 days5 days1 week2 weeks3 weeks

0 hours	3 days	30 days
4 hours	60 days	
8 hours	90 days	
12 hours	120 days	
1 day	150 days	
2 days	180 days	

The following steps cover adding a 1 hour time interval to the dropdown list via Dropdown Editor as an example:

1. Navigate to Admin > Dropdown Editor.
2. Locate the tselect_type_dom dropdown list and click to view the details.
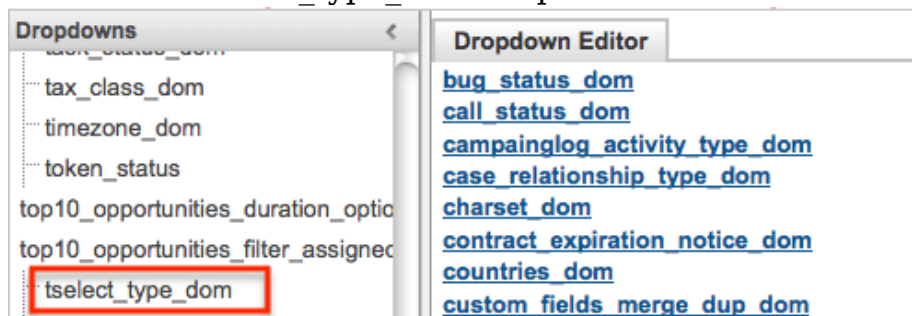
3. Enter an item name (e.g. 3600) and display label (e.g. 1 hours) into the corresponding fields below the existing item list.
   - Please note that the Item Name field must be in seconds equaling to the hours, days, weeks you wish to add.

4. Click "Add" to add the new value to the dropdown list.
   ○ **Note**: The value will be added to the end of the list, but you can drag and drop the item to the top of the list if you wish. For more information on how to reorder and position values in the dropdown list, please refer to the [Developer Tools](#) documentation.

5. Once the item has been added and placed in the correct position, click "Save" to preserve the change.

The newly added time interval will now appear in the corresponding dropdown list when creating the condition for a time elapsed workflow.

Workflow Sequence

When a record is saved within a module, Sugar will check all workflows for that module to see if they need to process and perform any actions or send any alerts. Sugar processes each of the workflows in sequential order, one after another. By default this order is determined as the order in which the workflow definitions were created; the oldest workflow fires first, moving up to the newest. This order, however, can be reorganized using the Workflow Sequence menu.

Workflow Sequence can be accessed through the following process:

1. Navigate to Admin > Workflow Management.
2. On the Workflow Definitions module tab, select "Workflow Sequence".
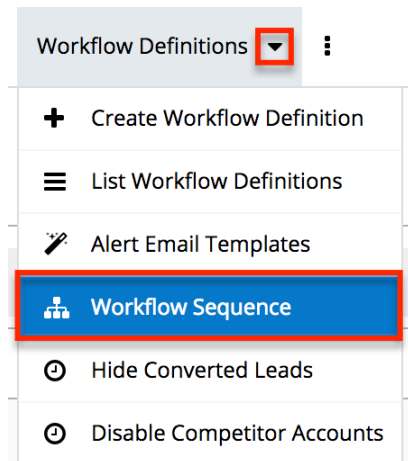
3. Select the module you would like to reorganize from the dropdown menu and click "Select".
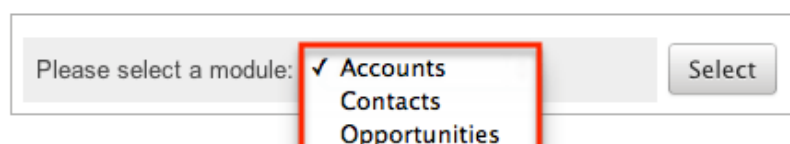
This process will produce a list view with all of the workflows for the particular selected module. The list view will show three columns containing details from the workflow fields, as well as a fourth column for "Process Order".

The Process Order column is used to reorganize the workflows into their correct processing order. The Up button will move the workflow up one rung in the process, whereas the Dn button will lower it in the sequence. The order of the workflow process for this module is determined on this menu, starting at the top and working its way down.

Last Modified: 2021-04-13 13:29:06

Products and Quotes

Overview

The configuration options in the Admin page's Products and Quotes panel enable you to define a variety of options for the Quoted Line Items and Quotes modules. The Products and Quotes panel provides access to the following administrative modules:

Module	Description
Product Catalog	List of products sold by your organization; used as a template for the Quoted Line Items and Revenue Line Items modules
Product Categories	Populates the categories by which products are organized in the Product Catalog
Product Types	Populates the Type dropdown list in the Product Catalog
Manufacturers	Populates the Manufacturer Name dropdown list in the Product Catalog
Quotes Configuration	Configure which fields appear in the quotes worksheet while building quotes
Shipping Providers	Populates the Shipping Provider dropdown list in quotes
Tax Rates	Populates the Tax Rate dropdown list in quotes

Please note the following as pertains to access and visibility of Product Catalog-related modules:

- Prior to Sugar 10.0, the Product Catalog, Product Categories, Product Types, and Manufacturers modules were only available to Administrator users. Information specific to these modules can now be found in the Product Catalog documentation in the Application Guide.
- The Quotes Configuration, Shipping Providers, and Tax Rates modules remain available only for administrators or users with developer-level role access. This documentation will cover information and actions specific to these modules.

For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting records, please refer to the Working With Sugar Modules section of this page.

Product Catalog, Product Categories, Product Types, and Manufacturers

Prior to Sugar 10.0, the Product Catalog, Product Categories, Product Types, and Manufacturers modules were only available to Administrator users but can now be accessed by all users subject to [license type](#) and standard [role and team restrictions](#). Information specific to these modules can now be found in the [Product Catalog](#) documentation in the Application Guide.

Quotes Configuration

The Quotes Configuration page allows you to specify the fields and their order which are available when working with quote records. When viewing or editing a quote in record view, the quote worksheet appears beneath its panels of fields. This is where product groups, quoted line items, and comments can be created and rearranged along with any discounts, taxes, or shipping fees. The worksheet is broken into three portions, the Summary Bar Header, Worksheet Columns, and Grand Totals Footer.

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

To modify each section's available fields and field order, click the desired section in the Quotes Configuration page. Doing so will open that section's preview on the left and the list of available, displayed, and related fields to the right. Click the boxes next to each field to toggle whether it is displayed or not.

The meanings of the three display statuses are as follows:

- **Available (Empty Box)** : The field is not displayed in the worksheet nor is

it being used in the calculation of a displayed field.

- **Related (Solid Box)** : The field is not displayed in the worksheet. It is being used in the calculation of a displayed field. Hovering over a field marked as "Related" shows a list of fields that use it in their calculations.
- **Displayed (Checked Box)** : The field is displayed in the worksheet. It may also be being used in the calculation of another displayed field.

All fields belonging to the Quotes module will be available for use in the Summary Bar Header section while the Grand Totals Footer section allows selection of any currency fields in the Quotes module. Fields belonging to the Quoted Line Items module are available for the Worksheet Columns section. Beneath each section's preview, the list of default fields for that section is displayed. Clicking the Restore Defaults link will revert any changes so that the section displays the default list of fields. For more information about the worksheet and its sections, refer to the Quotes documentation in the Application Guide.

Note: Image fields marked to display will be read-only in the quotes worksheet.

To rearrange the fields within a section, simply drag and drop each field in the section's preview.
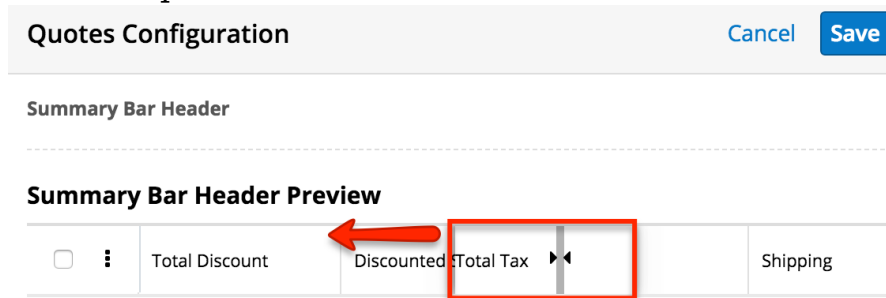
Once you have configured each section as desired, click "Save" to finalize your changes. Clicking "Cancel" will revert your changes.

Note: Changes made to the quotes worksheet will not apply when working with quotes within Sugar Mobile.

Shipping Providers

The Shipping Providers module controls and maintains the Shipping Provider field in the Quotes module. The Shipping Provider field allows you to determine how you are going to transport the purchased products or services to the customer.

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

Shipping Provider Fields

The Shipping Provider module contains three stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields.

Field	Description
Shipping Provider	The provider's name as it will appear in the Shipping Provider field of the Quotes module
Status	Select "Active" or "Inactive" to indicate which shipping providers are displayed as options in the Shipping Provider field
Order	Enter a number to specify the order in which this shipping provider option will appear in the quote's Shipping Provider field list

Ordering Shipping Providers

The Order field in the module defines the order in which the shipping provider options are displayed in the corresponding Shipping Provider field of the Quotes module. Enter the numeric value (e.g. 1, 2, 3) in the shipping provider record's Order field to determine the order it will display in the corresponding field list (Shipping Provider) on the quote record. For example, a shipping provider record with an order value of "1" will display at the top of the list followed by the next value (e.g. 2), and so forth. When creating new shipping provider records, the Order field will automatically increment to the next number in the list, thereby adding the new option to the bottom of the list. The Order field can be overwritten with another number if you would like to manually re-order the options.

Tax Rates

The Tax Rates module controls and maintains the Tax Rates field in the Quotes module. The Tax Rates field allows you to apply the applicable tax rate to the quote's taxable subtotal. Tax rates can be added as any necessary percentage, so they will be able to include national and international rates.

Note: The Tax Rates module is not available for Sugar Serve users. For more information on license types and the functionality available for each type, refer to

the [User Management](#) documentation.

Tax Rate Fields

The Tax Rate module contains four stock fields that come out-of-the-box with Sugar. For information on using and editing various field types, refer to the [User Interface](#) documentation. The below definitions are suggested meanings for the fields.

Field	Description
Tax Rate Name	The tax rate's name as it will appear in the Tax Rate field of the Quotes module
Percentage	The percentage of the quote's subtotal that will be taxed
Status	Select "Active" or "Inactive" to indicate which tax rates are displayed as options in the Tax Rate field
[Order](#)	Enter a number to specify the order in which this tax rate option will appear in the quote's Tax Rate field list

Ordering Tax Rates

The Order field in the module defines the order in which the tax rate options are displayed in the corresponding Tax Rate field of the Quotes module. Enter the numeric value (e.g. 1, 2, 3) in the tax rate record's Order field to determine the order it will display in the corresponding field list (Tax Rate) of the Quotes module. For example, a tax rate record with an order value of "1" will display at the top of the list followed by the next value (e.g. 2), and so forth. When creating new tax rate records, the Order field will automatically increment to the next number in the list, thereby adding the new option to the bottom of the list. The Order field can be overwritten with another number if you would like to manually re-order the options.

Working With Sugar Modules

The Shipping Providers and Tax Rates modules use Sugar's Sidecar user interface. The following sections detail menus, views, and actions common to sidecar

modules and contain links to additional information within the page or links to the User Interface documentation.

Menus

Sugar modules contain various options that are available via menus in the module tab, list view, and record view. The following sections present each menu type, using the Shipping Providers module as an example, and its options with links to more information about each option in the User Interface documentation or, for module-specific functionality, within this page.

Module Tab Menus

The Shipping Providers list view can be accessed by navigating to the Admin page and selecting "Shipping Providers" under the Product and Quotes panel. Click the tab to access the Shipping Providers list view. You may also click the triangle in the Shipping Providers 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 shipping providers you most recently viewed.
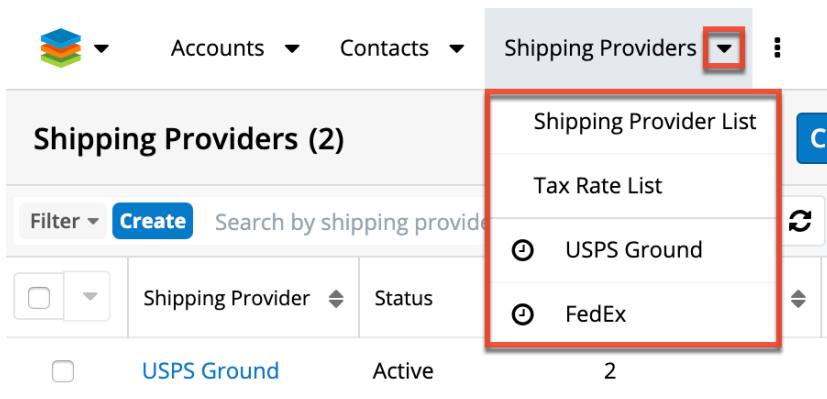
The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
[Shipping Provider List](#)	Opens the Shipping Providers list view layout to search and display shipping providers
[Tax Rate List](#)	Opens the Tax Rates list view layout to search and display tax rates

List View Menus

The Shipping Providers [list view](#) displays all shipping provider records and allows for searching and filtering to locate specific shipping providers. You can view the basic details of each record within the field columns of the list view or click the shipping provider's name to open the record view. To access the module's list view, simply navigate to the Admin page and select "Shipping Providers" under the Product and Quotes panel. You can also click the module's tab in the navigation bar once the Shipping Providers module opens.

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 shipping provider records or click the checkbox in the list header to select all records displayed on the current set of list view results.
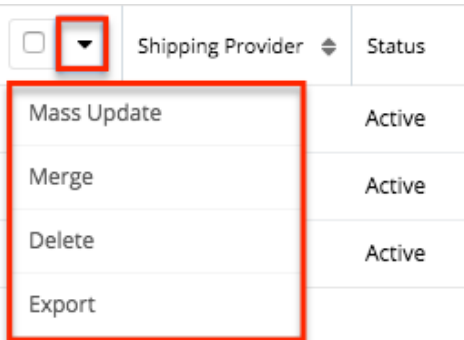
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
[Mass Update](#)	Mass update one or more shipping provider records at a time
[Merge](#)	Merge two or more duplicate shipping providers
[Delete](#)	Delete one or more shipping provider records at a time
[Export](#)	Export one or more shipping provider 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 individual shipping provider records 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 shipping provider in the intelligence pane
Edit	Edit this shipping provider
Delete	Delete this shipping provider

Record View Actions Menu

The Shipping Providers record view displays a single shipping provider in full detail including its fields. To access a shipping provider's record view, simply click the hyperlinked shipping provider name in the Shipping Providers list view. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.

The Actions menu allows you to perform the following operations:

Menu Item	Description

Edit	Edit this shipping provider
Share	Share a link to this shipping provider via email
Find Duplicates	Locate potential duplicates of this shipping provider
Copy	Duplicate this shipping provider
Delete	Delete this shipping provider

Common Views and Actions

The following links will open specific sections of the User Interface documentation where you can read about views and actions that are common across most Sidecar modules. The sections following this table describe behaviors and functionality specific to the Products- and Quotes-related modules.

Content Link	Description
Creating Records Basic Record Creation Creating Via Subpanels Creating Via Duplication Importing Records	The Creating Records section covers the various methods of creating new records, including via the Create button in the module, via the subpanel on related module records, duplication of an existing record, and importing a list of records into Sugar using a .csv spreadsheet.
Viewing Records Viewing Via List View Viewing Via Record View Viewing Via Recently Viewed Viewing Via Preview Viewing Via Reports	The Viewing Records section describes the various methods of viewing records, including via the list view and record view, the Recently Viewed menu in the module tab, previewing records in the right-hand side panel, and reports displaying the record's data.
Searching for Records Global Search List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to the two searching methods for locating Sugar records: global search, which searches across all Sugar modules, and list view search, which searches and filters within the module.
List View Total Record Count	The List View section walks through the many elements of the List View layout,

[Create Button](#) [List View Search](#) [Checkbox Selection](#) [Mass Actions Menu](#) [Favorite Designation](#) [Column Reordering](#) [Column Resizing](#) [Column Sorting](#) [Column Selection](#) [Preview](#) [Record Actions Menu](#) [More Records](#) [Dashboards](#)	which contains a filterable list of all records in the current module. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the list view are described in the List View Mass Actions Menu and List View Record Actions Menu sections of the module overviews below. **Note**: You can only mark records as favorites via the Product Catalog list view.
[Record View](#) [Favorite Designation](#) [Next or Previous Record](#) [Actions Menu](#) [Show More](#) [Dashboards](#)	The Record View section walks through the many elements of the Record View layout, which contains detailed information about a single record. While the generic menu options are described in the User Interface sections linked to the left, the options specifically available in the record view are described in the Record View Actions Menu sections of the module overview sections below. **Note**: You can only mark records as favorites via the Product Catalog record view.
[Editing Records](#) [Editing Inline Via Record View](#) [Editing Via Record View](#) [Editing Inline Via Subpanels](#) [Editing Inline Via List View](#) [Mass Editing Via List View](#)	The Editing Records section describes the various methods of editing existing records, including inline via the record view, in full edit mode on the record view, inline via the subpanel on related module records, inline via the list view, and via the Mass Update option on the list view.
[Deleting Records](#) [Deleting Via Record View](#) [Deleting Via List View](#) [Mass Deleting Via List View](#)	The Deleting Records section describes the various methods of deleting unwanted records, including via the record view, an individual record's Actions menu on the list view, and the Mass Actions menu on the list view.
[Exporting Records](#)	The Exporting Records section provides an introduction to the export

	functionality, which allows you to download a list of records and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).
[Recalculating Calculated Values](#)	The Recalculating Calculated Values section provides instructions on utilizing the Recalculate Values list view option to update calculated field values in the module if the administrator has changed the field's formula via Admin > Studio.
[Finding Duplicate Records](#)	The Finding Duplicate Records section provides instructions for locating duplicate records. If searching on matching fields (e.g. Name) identifies one or more duplicates, they can be merged into a single record.
[Merging Records](#) [Merging Via List View](#)	The Merging Records section provides instructions for merging duplicates, which combines field values and related records into a single record.
[Favoriting Records](#) [Favoriting via List View](#) [Favoriting via Record View](#)	The Favoriting Records section describes the various methods of marking records as favorites, including via the list view and record view. **Note**: You can only mark records as favorites via the Product Catalog module. Favoriting a product catalog record allows you to easily access the product from the list view, Product Catalog Quick Picks dashlet, or the Product Catalog module tab. For more information on the Product Catalog Quick Picks dashlet, please refer to the Opportunities or Quotes documentation.
[Sharing Records](#)	The Sharing Records section provides instructions for the Share record view option, which composes an email with a link to the record. If the recipient is logged into Sugar, clicking the link will bring them directly to the record view.

Bug Tracker

Overview

In the [Bugs](#) module, there are two dropdown fields, "Found in Release" and "Fixed in Release", that cannot be edited though normal means. Although these are dropdown fields, they do not show a [dropdown list](#) option in Dropdown Editor to add, remove, and edit the dropdown options.

Display Label:	Found in Release:
System Label:	LBL_FOUND_IN_RELEA!
Help Text:	
Comment Text:	The software or servic
Drop Down List:	
Default Value:	

The release dropdown list is instead controlled by the Releases section of the Administration page. The release list is more comprehensive than a standard dropdown list, so each list option needs additional information. This documentation will cover how to use the Releases module to make changes to the list that controls these fields.

Release Fields

The Releases module contains three fields which come out-of-the-box with Sugar. These fields are not found in Studio, and therefore cannot be edited.

Field	Description
Release Version	The version name or number of this release.
Status	Select Active from this dropdown list to display the name in the Release dropdown list. Inactive records will only show in the list view of this page.
Order	Enter a number to specify the order in

	which the release is displayed in the dropdown list. Numbers can be repeated in this field, so they can either be ranked in order (1,2,3...), in order of importance (1,1,1,2,2,2,3,3,3...), or any other ranking that is used internally.

Release Module Tab

The Releases module tab can be accessed by navigating to the Administration page and clicking "Releases" in the Bugs section.

Bugs

Maintain a list of releases for your product. Active releases are displayed in the Releases drop-down menus in bug records created within the Bug Tracker module.

Releases	Manage releases and versions	

Once in the Releases list view, you can click the triangle in the Releases module tab to display the Actions menu, which allows you to perform important actions within the module. Please note that clicking the module tab only allows you to access the Releases list view.

Releases ▾ ⋮ S
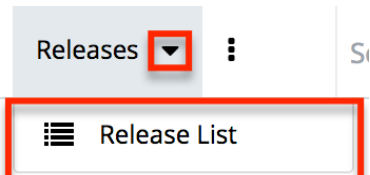
☰ Release List

Creating Releases

Releases can only be created from the Releases module. Use the following steps to create a release option for dropdown lists:

1. Navigate to Admin > Releases.
2. Click the Create button above the Releases list view.

Release List
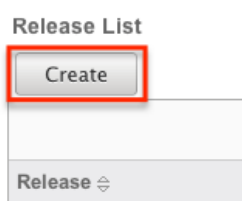
Create

Release ⇕

3. An editable subpanel will open below the list view. Enter the required information on the fields provided.

4. Click one of your two save options. Both will store your new record and have it available for use through Sugar. However, the behavior after clicking is dependent on which button used:
   - **Save** : After clicking "Save", the same release option that you created will remain editable for you to make additional changes if need be, after appearing on the list view above.
   - **Save & Create New** : After clicking "Save & Create New", the release appears on the list view, the edit form's "Release Version" field is cleared out, and the "Order" field is increased by one.

Viewing Releases

All of the release options are shown on a list view in the Releases module. Due to the Releases module only containing three fields, all of the necessary details are shown on this list view. The list view is always available when viewing the Releases module, and specific releases can be selected from the list, but records can also be selected via the Recently Viewed section of the module tab.

Viewing Via Module

To view all of the releases, navigate to Admin > Releases. The list view displays with all currently available releases within Sugar. The list view can be ordered by any of the three [fields](#) within Releases. To see additional releases, use the arrows in the top right of the list view to scroll through available pages. Here, you can see which records of the total amount of releases 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 list.

From this list, any of the releases can be clicked and either edited or deleted.
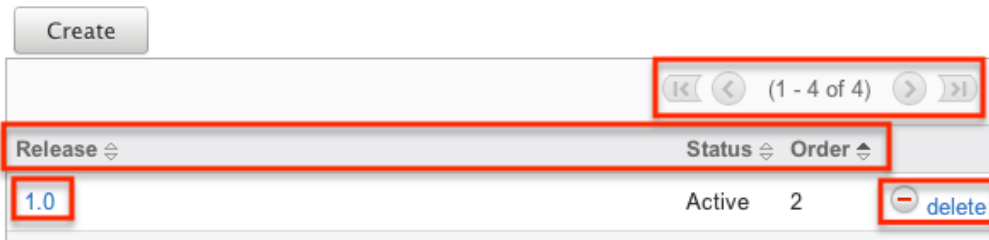
Editing Releases

Changes to releases can be made at the discretion of any admin at any time. To make changes, such as changing the name of the release and how it shows in the Bugs module, whether the release value is active or not, or the order in which the releases display, the release record needs to just be accessed via the list view. Follow these steps to edit releases:

1. Navigate to Admin > Releases.
2. Select the release that you would like to edit by clicking the release name.
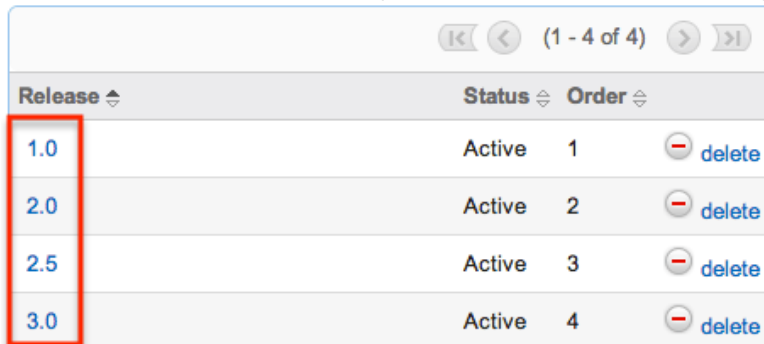
3. This will open the editor below the list view for the specific record where you can make the necessary changes.

4. Click one of your two save options. Both will store your updates to the record. However, the behavior after clicking is dependent on which button used:
   - **Save** : After clicking "Save", the same release option that you edited will remain editable for you to make additional changes if need be,
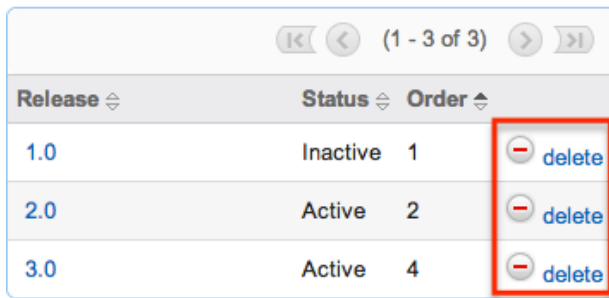
after the changes update on the list view above.

  - **Save & Create New** : After clicking "Save & Create New", the changes to the release appear on the list view, the edit form defaults back to [creating a new record](#).

Deleting Releases

If a release option is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Releases list view. Deleting release options will not delete the bugs that use them. Instead, if a bug's "Found in Release" or "Fixed in Release" field was filled in with the deleted release, the field will now be blank. Use the following steps to delete a release option from the Bugs module:

1. Navigate to Admin > Releases.
2. Click the Delete button corresponding to the release that you would like deleted.

The page will refresh and the option will now be removed from the list view and no longer appear in the dropdown fields (e.g. Found in Release).

Last Modified: 2020-11-30 17:17:29

Forecast Configuration

Overview

Sugar's Forecasts module incorporates opportunity records to build forecasting worksheets and predict sales. Users can work towards sales quotas at the individual, team, and sales organization level. Before users may 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, Scenarios, and Worksheet Columns.

Configuring Forecasts

Administrator users can access the Forecast configuration settings by navigating to the Administration page and clicking the Forecasts link.

As an alternative, administrators can also access the Forecast configuration settings by navigating to the Forecasts module. Clicking the Forecasts module tab before the module has been configured will automatically redirect administrators to the configuration wizard. After the module has been configured, they are able to choose "Settings" from the Actions menu within the Forecasts module to review their configuration selections and potentially make changes. For more information on making changes to the configuration, please refer to the [Editing Forecast Configurations](#) section of this documentation.
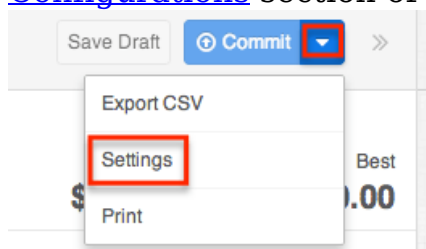
The Forecasts Setup wizard will guide you through the various configuration items.

Note: The Forecast Time Periods cannot be changed after initial setup without losing all existing Forecast data. The Forecast Ranges cannot be changed after the first Save Draft or Commit action in the Forecasts module. In order to make changes to these selections, please refer to the [Editing Forecast Configurations](#) section of this documentation.

Time Periods

The Time Periods panel allows you to match the Forecasts module's fiscal year and frequency of quota cycles to your organization's practices. These settings will control the beginning and duration of your forecasting time periods as well as control the number of past and future time periods users may access.

Use the following steps to configure Forecast Time Periods:

1. Select the Time Period type which matches your sales organization's practices. Choose "Yearly" if your sales organization has quarterly quotas which build up to a yearly goal. Choose "Quarterly" if you operate with monthly goals building to quarterly goals instead.

2. Click the calendar icon to select the start day and month of your organization's fiscal year from the date picker.

    If the start date of your organization's fiscal year is a date other than January 1, the fiscal year will span two years. You must specify which of those two years the start date applies to. In these cases, a dropdown will appear prompting you to select the appropriate fiscal year. For example, if the start date of the fiscal year is 07/01/2014, the end date will be 06/30/2015. The forecast wizard will therefore ask you if the time period 07/01/2014 -06/30/2015 should be considered fiscal year 2014 or fiscal year 2015.

    Note: It is not recommended to choose February 29th for the fiscal year start date, though this is possible to do during a leap year. If this date is

chosen, non-leap years will have fiscal year start date of March 1st.

3. Select how many future time periods users will be able to view in their forecast worksheets. This is the number of base Time Periods (years or quarters) as opposed to the sub-periods (quarters or months).
4. Select how many past time periods users will be able to view in their forecast worksheets. This is the number of base Time Periods (years or quarters) as opposed to sub-periods (quarters or months).
5. Click "Next".

Note: The Forecast Time Periods cannot be changed after initial setup without losing all existing Forecast data. In order to make changes after initial setup, please refer to the [Editing Forecast Configurations](#) section of this documentation.

Ranges

Forecast Ranges are a method of predefining what opportunity records should likely be included on forecasts and which should not. As the administrator, you will specify the sale probabilities which will cause opportunities to be initially included on a user's forecast. Each user, however, can then manually choose to include or exclude their opportunities no matter how the probabilities line up with these ranges.

In addition to initially including opportunities, these ranges will also be available to users in the Forecasts module as categories for filtering or for grouping in charts.

Two Ranges

Choose the Two Ranges radio button for a simple include or exclude model. You will then drag the left slider to specify the minimum probabilities that qualify an opportunity to be initially included on forecasts. In this two-range model, all opportunities with probabilities falling below the defined range will be initially excluded from forecasts. Choosing "Two Ranges" will cause the categories "Include" and "Exclude" to be available for users in the Forecasts module for filtering or grouping opportunities in charts.

Three Ranges

Choose the Three Ranges radio button to enable an intermediate range. Drag the left Include slider to specify the minimum probabilities that qualify an opportunity to be predefined as included on forecasts. Then use the Upside sliders to define the range of probabilities which will be initially excluded from forecasts but which can be viewed independently for consideration for inclusion by the user. All opportunities with probabilities falling outside these two ranges will also be predefined as excluded from forecasts. Choosing "Three Ranges" will cause the categories "Include", "Upside", and "Exclude" to be available for users in the Forecasts module for filtering opportunities in charts.
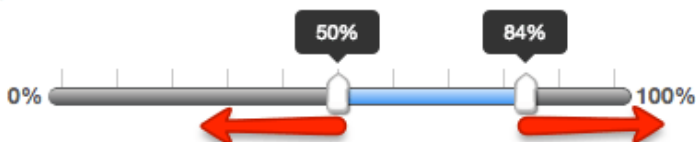
Scenarios

The Scenarios panel allows you to specify if you wish to have opportunity records' Best Case and/or Worst Case fields available on the forecast worksheets. The

"Likely" scenario is included automatically because it matches the opportunity record's required amount field. When "Best" and "Worst" are also enabled, users will have the ability to view and modify these additional values based on their opinion of what values may come about in the sale. This provides a broader range possible sales information when working to make forecasts as predictive as possible.

Note: The "Worst" field is disabled by default and must be enabled manually.

To add the Best or Worst scenario, click in the text box and select from the dropdown list which appears. Unwanted scenarios may be removed by clicking the "x".
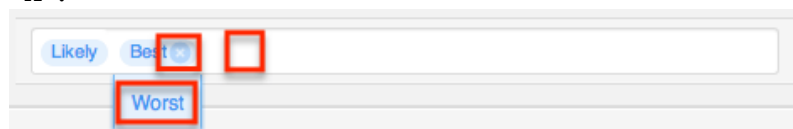
Once you are satisfied with your range selections, click "Worksheet Columns" to open the next panel.

Note: The Forecast Scenarios configurations may be changed at any time following initial setup by returning to the Admin > Forecasts page.

Worksheet Columns

The Worksheet Columns panel allows you to specify which fields will be available as columns in the Forecasts module. Users will be able to select from this list to configure the final appearance of their worksheet. For more information on selecting desired columns, please refer to the [Forecasts](#) documentation. Please note that "Best" and "Worst" will only be available as columns if they have been enabled in the [Scenarios](#) panel. Re-enabling one of these scenarios will automatically add it to the list of worksheet columns.

Add additional fields by clicking in the text box and choosing from the dropdown list which appears. Typing in the text box will narrow down the list to show only matching fields. Unwanted fields may be removed by clicking the "x".
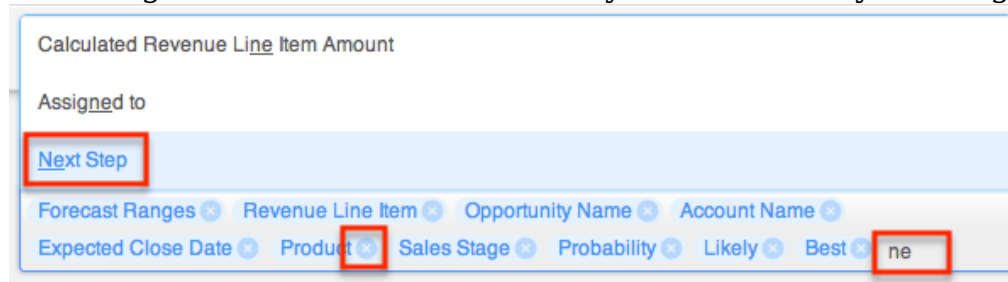
Once you are satisfied with your worksheet column selections, click "Save" at the top right.

Note: The Forecast Scenarios configurations may be changed at any time following initial setup by returning to the Admin > Forecasts page.

Editing Forecast Configurations

Once the Forecast Configurations have been completed, Sugar will apply the selected options and do an initial load of opportunities to the Forecasts module. The selected Time Periods are locked at the completion of the Forecast Configuration wizard, and the Ranges are locked once the first Save Draft or Commit action is performed within the Forecasts module. If, at a later time, the selections you made for Time Periods and Ranges need to be changed, the only way this can be accomplished is at the expense of any existing Forecasting data.

Should you choose to **lose all forecasting worksheets for the current, past, and future time periods**, a user with administrator access can navigate to https://yourinstancename.com/#bwc/index.php?module=Forecasts&action=ResetS ettings (where "https://yourinstancename.com" represents the URL you use to navigate to your Sugar instance) to instantly reset the Forecasts module. Please note that **you cannot undo this action, and you will not be prompted to confirm this decision before it takes effect**. Be sure to let the action complete before closing or refreshing the browser window.

Please take caution: Navigating to the URL above will reset your Forecasts module to a state as if it had never been used before, enabling you to make fresh selections for all elements within the Forecasts Configuration by navigating to Admin > Forecasts. Your instance's opportunity records will not be affected.

Last Modified: 2020-11-30 17:17:29

Contract Types

Overview

The Contract Types module in Admin > Contract Types enables you to create and manage contract types for the Contracts module. When a contract type is created, it will display in the Type Name field in the Contracts module for users to select. Please note that when a contract record is created with a specific contract type,

the related documents to the contract type will also appear in the Documents subpanel of the contract record.

Only administrators or users with developer-level role access have the ability to modify the available contract types and the order in which they appear in the Type Name field. This documentation will cover the basics of the Contract Types module as well as the various options available in performing the actions related to the module.

Contract Type Fields

The Contract Types module contains two stock fields which come out-of-the-box with Sugar. For information on using and and editing various field types, refer to the User Interface documentation. Please note that Contract Type fields are not editable via Admin > Studio as the module does not exist in Studio.

Field	Description
Name	The name of the contract type
List Order	A number to specify the order in which the contract type is displayed in the Type Name field in the Contracts module

Ordering Contract Types

When creating contract types, you will define the order in which the contract type option is displayed in the Type Name field of the Contracts module. Enter the numeric value (e.g. 1, 2, 3) in the contract type record's List Order field to determine the order it will display in the contract's Type Name field. For example, a contract type with a list order of "1" will be displayed at the top of the list followed by the next value (e.g. 2), and so forth. Please note that you can change the list order by editing the contract type via the list view or record view.

Working With Sugar Modules

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

Menus

The Contract Types 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 Contract Types-specific functionality, within this page.

Module Tab Menus

The Contract Type module tab can be accessed by navigating to the Admin page and clicking the Contract Types link in the Contracts section. Once in the Contract Types list view, you can click the triangle in the Contract Type module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important operations within the module. The [Recently Viewed menu](#) displays the list of contract type records you most recently viewed.
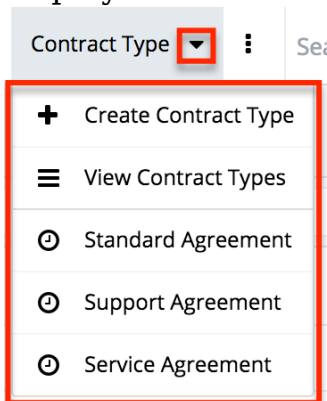
The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
[Create Contract Type](#)	Opens the record view layout to create a new contract type
[View Contract Types](#)	Opens the list view layout to search and display contract types

List View Menus

The Contract Types [list view](#) displays all contract type records and allows for

searching and filtering to locate specific contract types. You can view the basic details of each record within the field columns of the list view or click a contract type's name to open the record view. To access the module's list view, simply navigate to the Admin page and select "Contract Types" under the Contracts panel. You can also click the module's tab in the navigation bar once the Contract Types module opens.

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 type records or click the checkbox in the list header to select all records displayed in the current set of list view results.
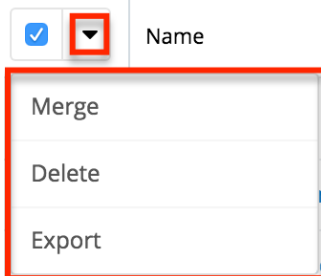
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
Merge	Merge two or more duplicate contract types
Delete	Delete one or more contract types at a time
Export	Export one or more contract types 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 type directly from the list view.
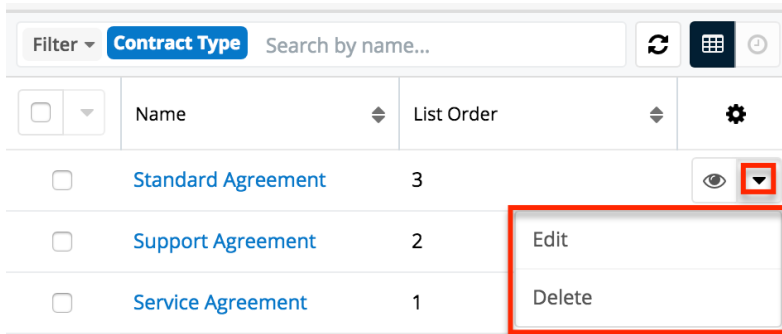
The list view's Record Actions menu allows you to perform the following operations:

Menu Item	Description
Preview (Eye icon)	Preview this contract type in the intelligence pane
Edit	Edit this contract type
Delete	Delete this contract type

Record View Actions Menu

The Contract Types record view displays a single contract type in full detail including its fields and subpanels of related records. To access a contract type's record view, simply click the hyperlinked contract type name in the Contract Types list view. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.
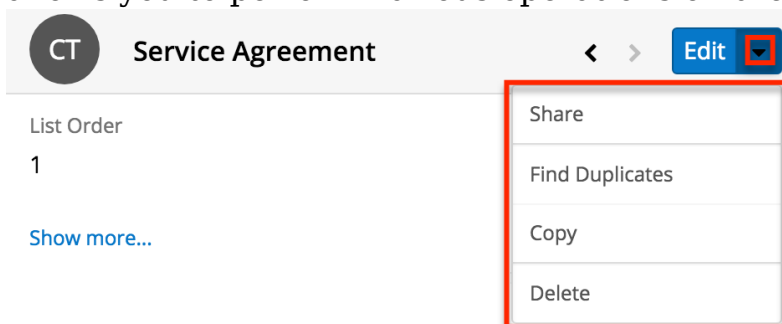
The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this contract type
Share	Share a link to this contract type via

	email
[Find Duplicates](#)	Locate potential duplicates of this contract type
[Copy](#)	Duplicate this contract type to create a new contract type
[Delete](#)	Delete this contract type

Common Views and Actions

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

General Instructions for Working With Sugar Modules	**Contract-Types-Specific Instructions**
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When Contract-Types-specific help exists for each topic, use the links below to navigate to sections of the current page.
[Creating Records](#)	
[Viewing Records](#)	
[Searching for Records](#)	
[List View](#)	[List View Mass Actions Menu](#) [List View Record Actions Menu](#)
[Record View](#)	[Record View Actions Menu](#)
[Intelligence Pane](#)	
[Editing Records](#)	[Ordering Contract Types](#)
[Deleting Records](#)	
[Exporting Records](#)	
[Finding Duplicate Records](#)	
[Merging Records](#)	
[Sharing Records](#)	

Last Modified: 2021-02-01 19:41:07

Advanced Configuration Options

Overview

Sugar comes with many different ways to configure your system to best meet your needs. Many configuration options are available throughout the application; though, some advanced options are not available through the interface, but can still be configured.

In the root directory of Sugar, there are two configuration files: config.php and config_override.php. These files hold many configuration options within your instance of Sugar. The config_override.php file is available for you to modify Sugar's configuration. For more information on which options are available to change, please refer to the [Developer Guide](#).

Note: Instances running on Sugar's cloud service do not have access to modify the config_override.php file.

Maintenance Mode

On rare occasions, you may need to restrict users from logging in to Sugar. This is particularly useful when upgrading Sugar or making significant changes to the application (e.g. changing config values, making code-level changes, or deploying changes via Studio, Module Builder, or Module Loader). For these situations, we recommend enabling maintenance mode, which is disabled by default. With maintenance mode enabled, only administrators will be able to log in, and regular users will receive an alert on the login screen letting them know that the system is temporarily unavailable. All incoming API calls will also encounter an error message until maintenance mode has been disabled. When possible, it is best practice to notify affected users in advance of a maintenance period.

To enable maintenance mode for your instance, add the following line to the config_override.php file:

```
$sugar_config['maintenanceMode'] = true;
```

System Configuration

Changing values in the config files can change functionality and behaviors in

Sugar. We always recommend testing your changes on a development or test system before changing values in a production system. After changing the config_override.php file, you should perform a Quick Repair and Rebuild from the Admin > Repair menu. For more information, please refer to the [Repair](#) documentation.

Configuring File Permissions

Many features in Sugar require the web server to have the proper file permission settings to be able to read and write files. At a minimum, the following files and directories need to be writable from your web server:

- ./config.php
- ./config_override.php
- ./sugarcrm.log
- ./cache/ and all subdirectories and files
- ./custom/ and all subdirectories and files
- ./data/ and all subdirectories and files
- ./modules/ and all subdirectories and files

Sugar running on Windows with IIS will need the IIS user (IUSR_[computerName]) to have access to these files.

Sugar running on Linux expects the listed files and directories to be owned by the same user running the web server and to also be in the same group. Sugar would then require the following permissions:

- 2770 for the directories listed above
- 660 for the config.php file and all files in the directories listed above
- 770 for bin/sugarcrm

When running on Linux, the config.php file in your Sugar instance's root directory contains a setting called default_permissions. This setting controls the ownership and accessibility to all files and folders created by Sugar. The following is an example of setting Read, Write, and Execute permissions for the Apache user and the Apache group on CentOS operating system:

```
default_permissions' => array(
    'dir_mode' => 1528,
    'file_mode' => 432,
    'user' => 'apache',
    'group' => 'apache',
),
```

The values for dir_mode and file_mode are decimal equivalent values for the

standard octal values entered for permissions. The value 1528 is the decimal equivalent of the octal value 02770 and a value of 432 which is the decimal equivalent of octal value 0660. These are the recommended directory and file permissions for Linux systems.

Note: If the octal values are entered, they will be interpreted as decimal and will not provide the expected file permission settings.

The 'user' and 'group' values determine the ownership of the files created. When empty, your Apache settings will take precedence to determine file and directory ownership. These values should be set explicitly to the Apache user and group on your server and these values will vary depending on the Apache setup and/or Linux OS you are running. To update these values, please edit the config_override.php file in the root directory of your installation and add the following lines:

```
$sugar_config['default_permissions']['user'] = '<your Apache user>';
$sugar_config['default_permissions']['group'] = '<your Apache group>';
```

Note: These values will take effect for only newly created files, not existing files. If you need to change the file permissions or ownership for existing files, you must execute the changes through the file system.

Allowing POP Email Accounts

Inbound email accounts are set up to work with IMAP protocols by default. If your email provider required POP3 access instead of IMAP, you can add the following line to the config_override.php file:

```
$sugar_config['allow_pop_inbound'] = true;
```

This will allow new inbound email accounts to be configured with POP3 or IMAP.

Note: POP3 access is not supported and can cause unintended consequences. IMAP is the recommended protocol to use for inbound email accounts.

Security Options

By default, all administrators have access to administrative tools in Sugar like the Upgrade Wizard, Module Builder, and Module Loader. The following sections will show a few different ways to disable these options.

Locking Down Admin Control

If you are managing multiple instances of the Sugar application, you can maintain complete control over the Sugar instances by preventing users with administrative privileges from making any changes. To do this, you can lock down the Upgrade Wizard and Module Builder with a single command in the config_override.php file:

```
$sugar_config['admin_access_control'] = true;
```

Locking Down Module Loader

To ensure that users with administrative privileges do not load sub-standard modules into Sugar, you can restrict the Module Loader to a specific directory on the web server that you control. This allows you to check modules before they are loaded into Sugar. To restrict the module loader, simply add the following lines to the config_override.php file:

```
$sugar_config['use_common_ml_dir'] = true;
$sugar_config['common_ml_dir'] = '/Applications/MAMP/htdocs/sugarcrm/screenedModules';
```

This will prevent any admin users from loading a module from any directory other than the specified directory. Once a module is approved through the necessary channels, the module can be placed in the specified directory for any admin to install when necessary.

New uploads for Module Loader are disabled. Installable modules are restricted to the modules pre-loaded below.	
Name	**Action**
Bug_53944_656-661_PRO_CORP_ENT_ULT.zip	Upload

Another method for locking down the module loader is to enable the package scanner. The package scanner is enabled by default for instances hosted on SugarCloud. If you are running Sugar on-site, you can enable the package scanner by adding the following command in the config_override.php file:

```
$sugar_config['moduleInstaller']['packageScan'] = true;
```

When the package scanner is enabled, the module loader will check the files being loaded for various functions that could be damaging to the server or instance of Sugar. For more information on which functions are blacklisted and how to configure the package scanner, please refer to the Developer Guide.

Enabling Sites as Referers

To prevent Cross-Site Request Forgery (XSRF) attacks, Sugar has a list of acceptable sites that are allowed as a referer to Sugar. If you receive a "Possible Cross Site Request Forgery (XSRF) Attack Detected" message from an approved site trying to access Sugar, you can add that approved site's URL to the list of valid referers by adding the following line to the config_override.php file:

```
$sugar_config['http_referer']['list'][] = 'my.site.com';
```

This line will add the specified site to the list of approved sites. If you have multiple sites to add, repeat this line for each site required.

Performance

If the performance of your Sugar instance begins to degrade, there are some configuration options you can enable to lighten the load on your system. The following options may cause Sugar's performance to increase, but some performance gains will come with a loss of functionality.

Recommended Server Settings

Sugar recommends a PHP memory limit of at least 512MB. This value may need to be increased depending on how your users utilize Sugar. For example, operations such as mass update and imports may require additional memory depending on your instance size and configuration. To change this limit, edit the setting within php.ini:

```
memory_limit = 512M
```

In addition, display_errors should always be set to "off". Enabling this option can result in adverse behavior for your users. To turn this setting off, edit the option within php.ini:

```
display_errors = off
```

When making changes to either of these settings or any other settings within php.ini, you must restart the web server before the settings will take effect.

Limiting System Resources

Sugar allows non-admin users to be restricted to how many queries they can run per action. By default, the limit for all modules is set to 1000 queries. This prevents user-initiated processes from taking up too many system resources. If an

operation is performed by a user that attempts too many queries they will see a message returned saying: "Error: Query limit of 1000 reached for Leads module." To change this limit for all modules, add the following line to the config_override.php file:

```
$sugar_config['resource_management']['default_limit'] = 5000; // defau
lt is 1000
```

Note: Setting the default_limit value to 0 will remove the query limit altogether for all modules.

In addition to setting the default for all modules, you can specify certain modules to have a different value. To remove the limit for specific modules only you need to specify the modules and the limit for those modules by adding the following lines to the config_override.php file:

```
$sugar_config['resource_management']['special_query_modules'][] = 'Acc
ounts';
$sugar_config['resource_management']['special_query_modules'][] = 'Con
tacts';
$sugar_config['resource_management']['special_query_limit'] = 0; // de
fault is 50000
```

In this example, the Accounts module, Contacts module, and any other module in the special_query_modules array will no longer be limited. All other modules will adhere to the default limit.

Note: Setting this limit too low can severely restrict users from performing basic actions. Alternatively, removing the limits altogether may let users inadvertently perform operations that significantly impact overall performance.

Changing the Upload Directory

Sugar stores content, such as images, documents, and installable modules, uploaded by users in the upload directory. Some of these documents may be large in size and can cause performance issues. Administrators can move the upload directory to a different location to ensure that enough space is available for uploads without affecting the system. You can change the location of the uploads to a different folder within the sugar directory or use an absolute path to place the folder anywhere in the file system. You can change this location by adding the following line to the config_override.php file:

```
$sugar_config['upload_dir'] = 'd:\upload\';
```

Note: Remember to copy files from the old upload directory into the new upload

directory for accessibility. The upload directory should be writable by the user running the web server.

Changing the Cache Directory

Sugar uses a cache directory to store files (such as compiled templates, aggregated variable definitions, remote mailbox data, various cache files) produced by the system to optimize functionality and enhance system performance. These files can take considerable space, especially in larger systems. You can change the location of the cache to a different folder within the sugar directory or use an absolute path to place the folder anywhere in the file system. You can change this location by adding the following line to the config_override.php file:

```
$sugar_config['cache_dir'] = 'd:\cache\';
```

Some of the cache files can be accessed by direct URLs. So if you move the cache directory, you should also ensure that the URL /cache/ (relative to the main Sugar site URL) on your web server is configured to refer to the new cache location. For more information on how to configure mappings between URLs and file system directories, refer to your web server documentation.

Note: The cache directory needs to be created first, or you may receive an internal server error. The cache directory should be writable by the user running the web server.

Configuring Count Queries

By default, list views and subpanels in Sugar return record counts. This can be convenient to know how many records were found for a specific search, but in order to retrieve the record count; Sugar needs to perform additional queries on the database. When there are large amounts of data, these queries can cause performance issues. You can disable these count queries in Sugar by adding the following line to the config_override.php file:

```
$sugar_config['disable_count_query'] = true;
```

Instead of seeing the total record count, you will see the current known record count with a plus sign next to it.

Disabling Related Calculation Fields

When a calculated field in Sugar uses the related function in the Sugar Logic, this will cause the calculated field to be executed when the related module is updated. This can cause a cascading effect through the system to update related calculated fields. When this happens you may receive a 502 Gateway Error. You can disable the related calculation field updates by adding the following line to the config_override.php file:

```
$sugar_config['disable_related_calc_fields'] = true;
```

Note: This is a global setting that will affect all modules. If you have a calculated field in Accounts that sums up all Opportunities for the account, setting this value to true will no longer update the opportunity account sum in Accounts until the account record itself is modified. However, if this setting is left disabled, the sum would update any time a related opportunity or the account is modified.

Disabling Automatic Searches

By default, list views in Sugar remember the last search performed by the current user in each module. While this can be convenient, it is sometimes unnecessary. If the last search performed in a module was an extensive search, the next time the user navigates to that module will inadvertently perform the search again. This can have a negative impact on performance in Sugar.

Set one of the following values for $sugar_config['save_query'] in the config_override.php file to configure different options for saving list view queries:

Value	Description
all	Populates the last search and executes it **Note**: This is the default behavior in Sugar.
no	Discards the previous search and executes a search with no criteria
populate_only	Populates the last search but does not execute it

For example:

```
$sugar_config['save_query'] = 'populate_only';
```

Note: The $sugar_config['save_query'] setting is not supported for Sidecar modules and only applies to Legacy modules.

Using a Custom Page For Campaign Trackers

When sending campaigns through Sugar, tracker URLs are used for images, links, and the opt-out link in the campaign. When the recipient of the campaign clicks one of these links they are by default taken to the Sugar instance that sent the campaign. Many organizations may want to use a custom page to send recipients to instead of using Sugar, or when running Sugar onsite it may be behind a firewall and not accessible to the recipients of the campaign. Use the following steps to create a custom landing page to use for tracker URLs while still properly recording the activity in Sugar.

- Create an index.php page on the desired web server that is open to the Internet.
- Add the following code to the custom index.php page to ensure all campaign activities are properly recorded in Sugar.
  Note: Replace all occurrences of "http://sugar_url" in the code below with the actual Site URL of your Sugar instance.

```php
<?php
  if ($_REQUEST['entryPoint'] == 'removeme' || $_REQUEST['entryPoint']
 == 'campaign_trackerv2' || $_REQUEST['entryPoint'] == 'image') {
    if (strlen($_REQUEST['identifier']) == 36) {
      $ch = curl_init();
      if (strlen($_REQUEST['track']) > 0) {
        curl_setopt($ch, CURLOPT_URL, \"http://sugar_url/index.php?ent
ryPoint=\" . $_REQUEST['entryPoint'] . \"&identifier=\" . $_REQUEST['i
dentifier'] . \"&track=\" . $_REQUEST['track']);
                curl_setopt($ch, CURLOPT_HEADER, 1);
                curl_setopt($ch, CURLOPT_SSL_VERIFYPEER, 0);
                curl_setopt($ch, CURLOPT_FOLLOWLOCATION, 0);
                curl_setopt($ch, CURLOPT_RETURNTRANSFER, 1);
                curl_setopt($ch, CURLOPT_USERAGENT, $_SERVER['HTTP_USE
R_AGENT']);
                $headers = curl_exec($ch);
                $headerArray = explode(\"\n\",$headers);
                foreach ($headerArray as $value) {
                    if (substr(strtolower($value),0,8) == \"location\"
) {
                        header($value);
                    }
                }
            } else {
                curl_setopt($ch, CURLOPT_URL, \"http://sugar_url/index
.php?entryPoint=\" . $_REQUEST['entryPoint'] . \"&identifier=\" . $_RE
QUEST['identifier']);
```

```
                curl_setopt($ch, CURLOPT_HEADER, 0);
                curl_setopt($ch, CURLOPT_SSL_VERIFYPEER, 0);
                curl_setopt($ch, CURLOPT_FOLLOWLOCATION, 1);
                curl_setopt($ch, CURLOPT_USERAGENT, $_SERVER['HTTP_USE
R_AGENT']);
                curl_exec($ch);
            }
        curl_close($ch);
        unset($ch);
        }
    }
?>
```

- Finally, specify the external server URL in the Admin > Campaign Email
  Settings > Location of campaign tracking files option in order for the
  tracking links to be correctly generated in the campaign emails. For more
  information on setting this value, please refer to the [Email](#) documentation.

Configuring Cron for Schedulers

Sugar's scheduler jobs are executed by the cron utility which runs on your server.
There are several configuration options available to ensure that long-running or
failed scheduler jobs do not impede your other scheduler jobs from running in a
timely manner.

First, max_cron_runtime determines how long a single job should be allowed to
run. If a single job exceeds this limit, cron.php is aborted with the long-running job
marked as in progress in the job queue. The next time cron runs, it will skip the job
that overran the limit and start on the next job in the queue. Additionally, if the
total running time of a single cron run across all current jobs exceeds
max_cron_runtime, then cron will complete whatever job it is currently executing,
then stop. The next time cron runs, it will pick up with the next queued job. The
max_cron_runtime uses seconds as its units and defaults to 1800 (30 minutes). You
may wish to adjust this number based on the typical time requirements of
scheduler jobs in your instance.

By default, max_cron_runtime is not enforced on your instance. In order to enforce
this limit, set enforce_runtime to true.

```
$sugar_config['cron']['enforce_runtime'] = true; // default is false
$sugar_config['cron']['max_cron_runtime'] = 1800; // seconds, default
is 1800
```

The timeout configuration controls how long cron will wait before re-starting a job that previously failed to complete. Once a job has been marked as in progress for longer than the timeout setting, the next cron run will mark the job as failed, making it eligible in the queue to be executed by the following cron run. The timeout uses seconds as its units and defaults to 3600 (1 hour). You may wish to adjust this number based on how quickly you wish a failed or long-running job to be reattempted. Please note that should enforce_runtime be set to false or your max_cron_runtime be longer than the timeout, a job which is running normally may be set to "failed" upon reaching this timeout limit.

```
$sugar_config['jobs']['timeout'] = 3600; // seconds, default is 3600
```

Last Modified: 2020-11-30 17:17:29

Employee Records

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.

Note: For instances that use SugarIdentity, the administrator will need to access [SugarIdentity](#) via the SugarCloud Settings console to create and manage user records.

As the Employees module contains internal information about your company, not specifically Sugar, it is not subject to [team](#) and [role](#) restrictions.

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. Fields can be altered, added, or removed via Admin > Studio. For more information on configuring fields, please refer to the [Studio](#) documentation in the

Administration guide.

For instances that use SugarIdentity, the administrator will need to access [SugarIdentity](#) via the SugarCloud Settings console to edit the following read-only fields for any employee records that are tied to a user record in SugarIdentity:

- First Name
- Last Name
- Title
- Department
- Office Phone
- Primary Address
- City
- State
- Postal Code
- Country
- Primary Email Address

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 list's the employee's manager, if the manager is a Sugar user
State	The state of the employee's address
Title	The employee's job title

Employees Module Tab

The Employees module tab can be accessed by clicking your profile icon and selecting "Employees" in the user menu.

Once in the Employees list view, you can click the triangle in the Employees module tab to display the Actions and Recently Viewed menus. The Actions menu allows you to perform important actions within the module. The [R€ecently Viewed menu](#) displays the list of employees you last viewed in the module. Please note that clicking the module tab allows you to access the Employees list view.
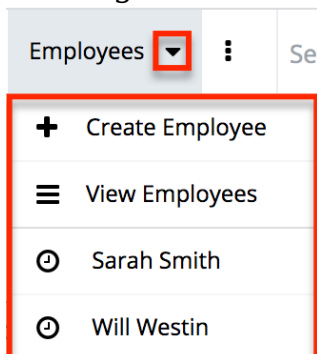
The Actions menu allows you to perform the following operations:

Menu Item	Description
Create Employee	Opens the edit view layout to create a new employee
View Employees	Opens the list view layout to search and display employees

Creating Employees

There are various methods for creating employees in Sugar including via the Employees module, the Users module, and duplication. The full edit view layout opens when creating the employee directly from the Employees menu and includes all of the relevant fields for your organization's employees. The edit view layout can be configured via Admin > Studio. For more information on configuring layouts, please refer to the Studio documentation. Please note that when a new user is created, an employee record is also created by default using the relevant information from the user record. For instances that use SugarIdentity, an administrator will need to access SugarIdentity via the SugarCloud Settings console in order to create new users.

Creating Via Employees Module

One of the most common methods of employee creation is via the Create Employee option in the Employees module tab. This opens up the edit view layout which allows you to enter in all the relevant information for the employee.

Use the following steps to create an employee via the Employees module:

1. Click the triangle in the Employees module tab and select "Create Employee".
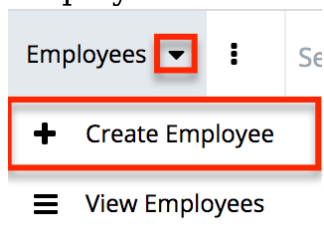
2. Enter appropriate values for the fields in the edit view layout. All required fields are marked with a red asterisk and must be completed prior to saving.
3. Once the necessary information is entered, click "Save".

Creating Via Users Module

When a user is created, an employee record is also created by default using the relevant fields from the user record to be populated on the employee record. The field in the Users module that controls this is the "Display Employee Record" field. For more information on creating users, please review the Users documentation.

Note: For instances that use SugarIdentity, an administrator will need to access SugarIdentity via the SugarCloud Settings console in order to create new users.

Creating Via Duplication

You can also create a new employee by duplicating an existing employee record. The Copy option is useful if the employee you are creating has similar information to an existing employee.

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

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

» Will Westin

Edit ▾
Copy
Delete e Status: Active

Name: Will Westin
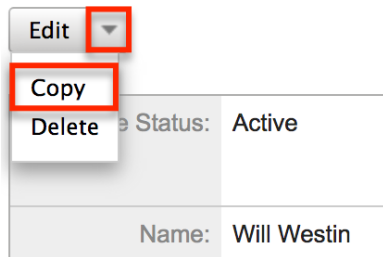
3. The displayed edit view is pre-populated with the original employee's values. Update the necessary fields, then click "Save".

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 in the top right side of Sugar.

Viewing Via List View

The Employees list view displays all employee records meeting the current search criteria. To access the list view, simply click the Employees option under your user name on the module tab bar. While list view shows key employee fields, you can click the employee's name to open the record in detail view. For more information on viewing employees via list view, please refer to the Employees List View section of this documentation.

Viewing Via Detail View

The Employees detail view displays thorough employee information by showing all employee fields. The detail view can be reached by clicking an employee record's link from the Employees list view. For more information on viewing employees via detail view, please refer to the Employees Detail View section of this documentation.

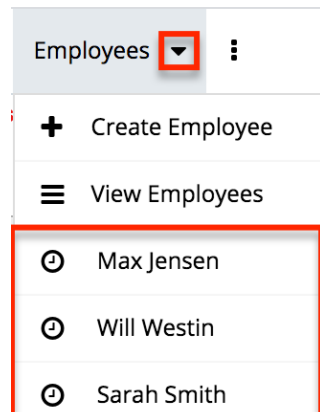## Viewing Via Recently Viewed

As you work, Sugar will keep track of which employees you have recently viewed. Click the triangle in the Employees module tab to see a list of the 3 records you

most recently viewed in the module. Clicking the record's name (e.g. Will Westin) within the list will open it in detail view.

Searching Employees

The Employees list view includes a Basic and Advanced Search to help you locate records easily and effectively in a module-specific manner. Once the search is performed, the relevant results will be displayed in the Employees list view below. Please note that Sugar automatically appends the wildcard character (%) to the end of your search phrase. This allows the system to retrieve all records that start with the keyword entered in the search. If you would like to broaden the search, you can use the wildcard at the beginning of your text as well (e.g. %services). This will pull up any record that has the word "services" in the name, regardless of how it starts or ends.

For more information on using the various search methods as well as how wildcards are used in the different methods, please refer to the [Search](#) documentation.

Basic Search

Basic search offers a few, commonly used fields for a simplified search experience. From the Basic Search panel, you can click "Advanced Search" to access additional search functionality as needed.

The buttons and checkboxes available in Basic Search panel have the following functions:

- **Search** : Click the Search button or press your Return/Enter key to perform the search.
- **Clear** : Click the Clear button to clear all criteria from the searchable fields.

- **Active Employees** : Select this box to return only records where Employee Status is Active.

Search Employees

| Name | | Active Employees ☐ | Search | Clear | **Advanced Search** |

| ☐ ▾ | Mass Update ▾ |

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "Active Employees" and enter an employee's name, Sugar will only return employee records with a matching name that are active. Once the search is complete, the relevant results will populate in the list view below the search panel. To see all employee records, simply click "Clear" and then "Search" to perform a blank search with no filters.

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

Advanced Search

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

The buttons, checkboxes, and dropdowns available in Advanced Search have the following functions:

- **Search** : Click the Search button or press your Return/Enter key to perform the search.
- **Clear** : Click the Clear button to clear all criteria from the searchable fields.
- **Active Employees** : Select this box to return only records where Employee Status is Active.
- **Layout Options** : Use the expandable Layout Options section to configure your list view. For more information, please refer to the Layout Options section of the Search documentation.
- **Saved Searches** : Save, recall, update, and delete searches which you use often. For more information, please refer to the Saved Search section of the Search documentation.

When you run a search, Sugar will return records matching all (as opposed to any) of the fields and checkboxes for which you have given a value. For example, if you select "Active Employees" and enter an employee's name, Sugar will only return employee records with a matching name that are active. Once the search is complete, the relevant results will populate in the [list view](#) below the search panel. To see all employee records, simply click "Clear" and then "Search" to perform a blank search with no filters.

Administrators can configure what fields appear on the Employees Basic Search via Admin > Studio. For more information on editing layouts, please refer to the [Studio](#) documentation in the Administration guide.

Employees List View

The Employees list view displays all employee records meeting the current search criteria. You can view the basic details of each employee within the field columns.

You have the option to change what fields are displayed in the 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.

Checkbox Selection

You can perform actions on employee records directly from the list view by first selecting the desired records. To select individual employee records on the Employees list view, mark the checkbox on the left of each row. To select or deselect multiple case 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 case results.
- **Select All** : Selects all records in the current search results across all pages of case results.
- **Deselect All** : Deselects all records that are currently selected.
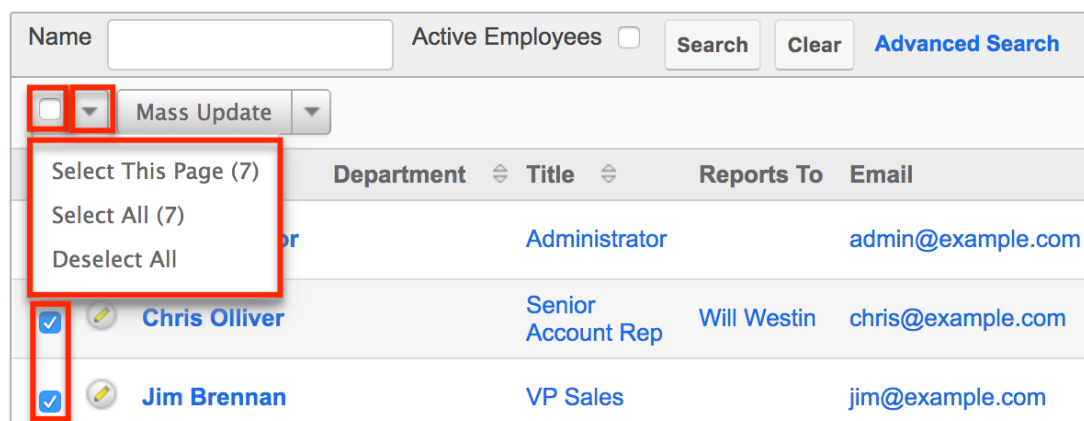
Actions Menu

The Actions menu to the right of the checkbox dropdown allows you to perform actions on the currently selected records.
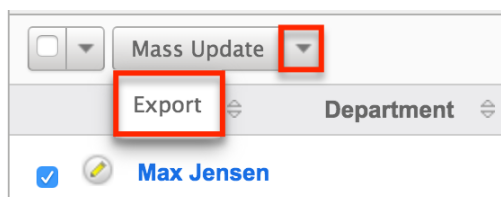
The options in the Actions menu allow you to perform the following operations:

Menu Item	Description
Mass Update	Mass update one or more employees at a time
Export	Export one or more employees to a CSV file

Column Sorting

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

Employees Detail View

The Employees detail view displays thorough employee information by way of all employee fields grouped into one page.

Users with administrator or developer access have the ability to change the detail view by configuring the layout via Admin > Studio. For more information on editing layouts, please refer to the Studio documentation in the Administration guide.

Next or Previous Record

On the upper right of the Employees detail view, there are two buttons that allow you to page through each employee in the Employees list view's current search results. Clicking the Previous button displays the previous employee of the current

search results while clicking the Next button displays the next employee of the current search results. The text in between shows which employee result you are currently viewing within the total number of current results.

» Max Jensen

Edit ▾   ◀ (1 of 7) ▶

| Employee Status: | Active | Avatar: | |
| Name: | Max Jensen | | |

Editing Employees

Administrators may edit employees at any time to update or add information to the record. You can make changes to existing employee records via the Employees edit view and quick create forms. Edit view is available within the Employees module and includes all of the Employees fields you should need. You can configure the Employees edit view via Admin > Studio. For more information on configuring layouts, please refer to the [Studio](#) documentation in the Administration guide.

For instances that use SugarIdentity, the administrator can only edit employee records that are [created](#) directly in Sugar. For any employee records that are tied to a user record in SugarIdentity, there are certain [fields](#) (e.g. Office Phone, Title) in the employee's record that are read-only and can only be edited via the Sugar[Cloud Settings console](#).

Editing Via Detail View

You can edit employees 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.

» Max Jensen

Edit ▾

| Employee Status: | Active | Avatar: | |

Editing Via List View

You can also edit employees by clicking the Pencil icon to the left of each employee's name in the [list view](#). The edit view layout will open where you can update the necessary fields and click "Save" to preserve your changes.

	Name ⇕	Department ⇕	Title ⇕
☐ 🖊	**Will Westin**		Sales Manager East
☐ 🖊	**Sarah Smith**		Sales Manager West

Deleting Employees

If an employee record is invalid or should no longer appear in your organization's Sugar instance, it may be deleted from the Employee's detail view. Deleting employee records will also delete the user record that this employee was related to.

Note: For instances that use SugarIdentity, the administrator can only delete employee records that are [created](#) directly in Sugar. Any employee records that are tied to a user record in the SugarCloud Settings console cannot be deleted, and administrators will need to access [SugarIdentity](#) via the SugarCloud Settings console in order to delete the user record. Deleting the user record via the SugarCloud Settings console will delete the corresponding user and employee records from Sugar.

Use the following steps to delete an employee record via the detail view:

1. Navigate to an employee record's detail view.
2. Click the Actions menu and select "Delete".

   » Will Westin

   Edit ▼
   Copy
   Delete   Status: Active

   Name: Will Westin
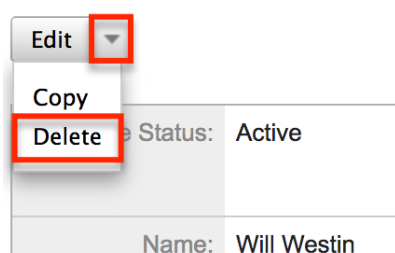
3. A pop-up message will display asking for confirmation and alerting you that the User record will also be deleted. Click "Ok" to proceed.

Exporting Employees

Sugar's Export option allows administrators to download all fields for the selected

employees to their computers as a CSV (comma-separated values) file. This may be useful when needing to use Employee 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 employee records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.
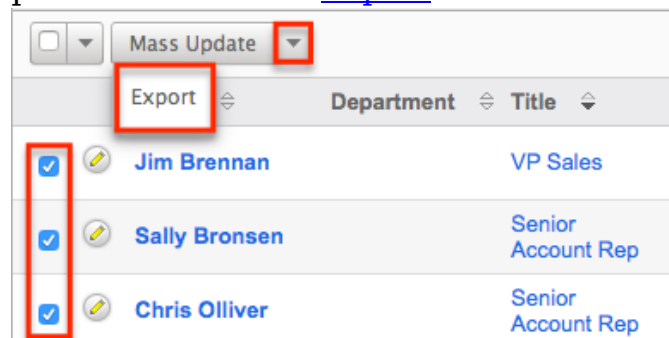
Employees may be exported from the Employees list view by selecting "Export" from the Actions menu. For more information on exporting records in Sugar, please refer to the [Export](#) documentation.

Mass Updating Employees

Mass Updating allows administrators to make the same change to multiple employee records at once from the Employees list view. Administrators 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 employee records. If you encounter an error when performing this action, we recommend selecting the records in smaller batches.

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

1. Navigate to the Employees list view by clicking the Employees module tab.
2. Use the list view's [Basic](#) or [Advanced Search](#) to find employees you wish to modify.
3. Select the desired employees 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.

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

Last Modified: 2020-11-30 17:17:29

Knowledge Base Administration

Overview

Sugar's Knowledge Base module provides the ability to create, maintain, and publish articles. Certain aspects of the Knowledge Base module are only available for administrators or users with developer-level role access including the creation and editing of templates and accessing the Knowledge Base settings. This documentation will cover information and actions specific to Knowledge Base administration.

For more information on actions available to regular users such as creating and editing articles, please refer to the [Knowledge Base](#) documentation in the Application Guide. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting templates, please refer to the [Working With Sugar Modules](#) section of this page.

Settings

You have the option to add, edit, or delete different languages for article records in the Settings section. This is helpful if articles are to be translated into multiple languages. When one or more additional languages have been added, users can create localization articles. It is important to note that when a language is deleted from the available languages, all localization articles created with that language will also be deleted.

To access the Settings page, click the triangle in the Knowledge Base module tab to open the Actions menu and select "Settings".
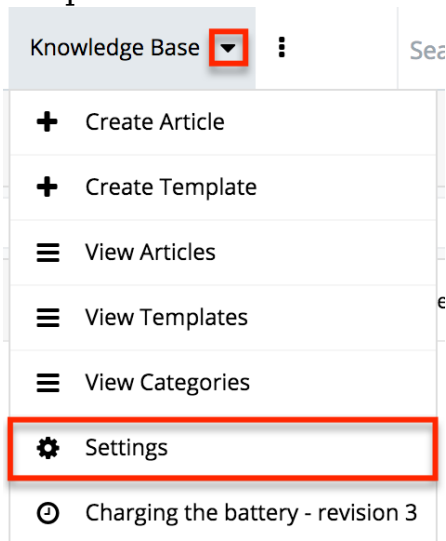
The Knowledge Base Settings drawer will appear which allows you to edit, add, or remove languages for the Knowledge Base module. To add a new language, click the "+" icon and enter the Language Code and Language Label. To remove a language, select the "-" icon. The primary language is set in the Language field by default for all new articles. But you can change the primary language by selecting the star icon. Click "Save" to finalize any changes made.
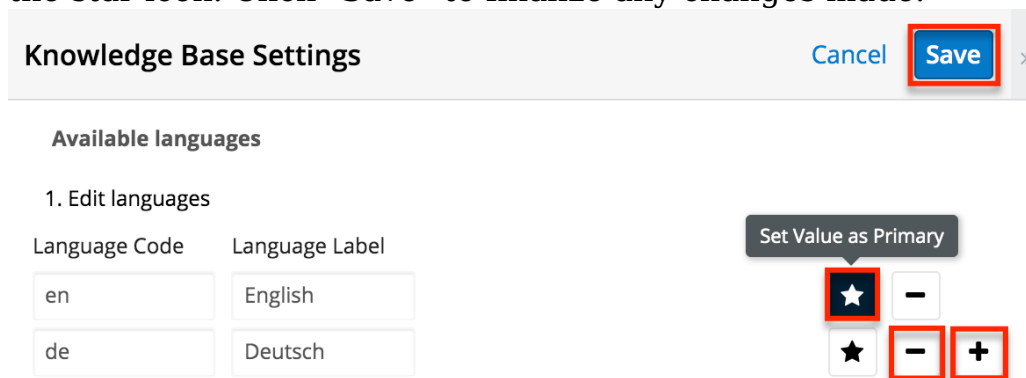
Working With Sugar Modules

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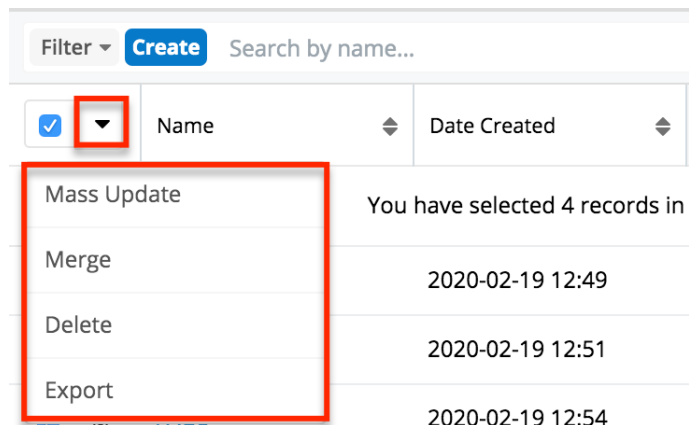
Menus

The Knowledge Base Templates section contains various options and functionality which are available via menus in the 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 Templates-specific functionality, within this page.

List View Menus

The Knowledge Base Templates [list view](#) displays all knowledge base template records and allows for searching and filtering to locate specific templates. You can view the basic details of each record within the field columns of the list view or click an template's name to open the record view. To access a module's list view, simply click the Knowledge Base module's tab in the navigation bar at the top of any Sugar page and select "View Templates".

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 template 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 templates at a time
Merge	Merge two or more duplicate templates
Delete	Delete one or more templates at a time
Export	Export one or more templates 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 template 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 template in the intelligence pane
Edit	Edit this template
Follow	Follow this template
Delete	Delete this template

Record View Actions Menu

The knowledge base template record view displays a single template in full detail including its fields and the activity stream. To access a template's record view, simply click a hyperlinked template 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.
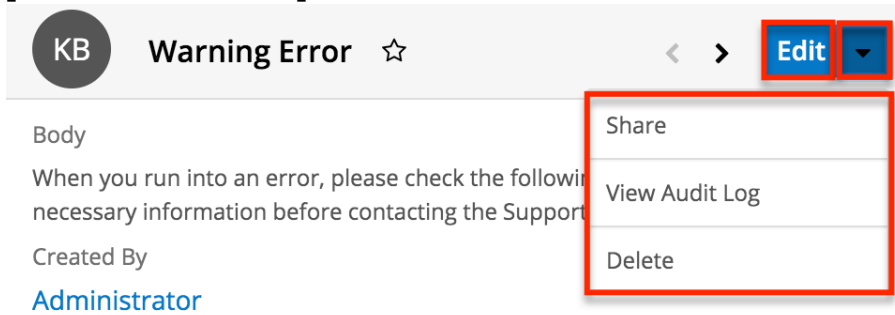
The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this template
Share	Share this template
View Audit Log	View a record of changes to this template
Delete	Delete this template

Common Views and Actions

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

General Instructions for Working With Sugar Modules	KB-Templates-Specific Instructions
Use the links below to navigate to the User Interface page which covers topics generic to many Sugar modules.	When KB-Templates-specific help exists for each topic, use the links below to navigate to sections of the current page.
Creating Records	
Viewing Records	
Searching for Records	
List View	List View Mass Actions Menu List View Record Actions Menu
Record View	Record View Actions Menu
Intelligence Pane	

Editing Records	Settings
Deleting Records	
Exporting Records	
Merging Records	
Viewing Record Audit Logs	
Favoriting Records	
Following Records	
Sharing Records	
Using the TinyMCE Text Editor	

Last Modified: 2021-02-01 22:02:17

Tag Management

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 be defined via basic database fields. Sugar stores tags as individual records in the Tags module. Modules using the Sidecar user interface (e.g. Accounts, Contacts, etc.) contain a Tags field where users can create and share tags that can be used to identify records in filters, dashlets, and reports. For a list of sidecar modules, please refer to the User Interface documentation in the Application Guide.

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 these administration options which allow you to manage the system-wide tag repository. For information about tag functionality which is available to regular users, please refer to the Tags documentation in the Application Guide. For instructions concerning views and actions which are common across most Sugar modules, such as creating, editing, and deleting tags, please refer to the Working With Tags section of this page.

Note: The Tags module is not configurable in Studio.

Understanding Tag Behavior

The act of relating a tag to a Sugar record is referred to as "tagging". By default, modules using the Sidecar user interface (e.g. Contacts, Leads, Accounts, etc.) are enabled for tagging and include the Tags field in the layout. Tags can be related to multiple records across any sidecar module, so a single tag can appear on multiple records. Likewise, a single record can have multiple tags. Unlike other Sugar modules, users can see all tag records regardless of their team memberships. Additionally, users will be able to edit Tag fields to add existing tags or create new tags regardless of any role restrictions their user has for the Tags module.

Please note that only administrators and users with developer-level role access may create, edit, merge, and delete tags in the Tags module. To assign a Tags Administrator role to a Sugar user, please refer to the Creating a Tags Administrator section of this page.

Note: While the "Find Duplicates" functionality is disabled for all users of the Tags module, users with administrator access to the Tags module can find and merge duplicate tag records via list view. For more information on merging records, refer to the User Interface documentation.

For more information on tag usage guidelines and interacting with tags in Sugar, please refer to the Tags documentation in the Application Guide.

Tag Fields

The Tags module contains a number of stock fields that come out-of-the-box with Sugar. For information on using and and editing various field types, refer to the User Interface documentation. The definitions below are suggested meanings for the fields, but the fields can be leveraged differently to best meet your organization's needs.

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

Consolidating Synonymous Tags

Sugar prohibits users from saving duplicate tag records, but with many users working in and importing new records to Sugar, it is possible for synonymous tag records (e.g. computer and computers) to accidentally occur in the system.

Before creating a new tag record, a good practice is to first check that a similar tag does not already exist in Sugar. You can locate candidates for cleanup using the list view search from the Tags list view. Searching for tags with similar names or other information can turn search into a powerful, duplicate-finding tool. If synonymous tag records are detected, perform a merge as described in the User Interface documentation.

Note: While the "Find Duplicates" functionality is disabled for all users of the Tags module, users with administrator access to the Tags module can find and merge duplicate tag records via list view.

Creating a Tags Administrator

By default, only administrator or developer users have the ability to create, edit, delete, and merge tags in the Tags module. It may be helpful to delegate these administrative tasks to one or more designated user(s) without giving them full administrative permissions in Sugar.

Use the following steps to create a Tags Administrator role:

1. Navigate to Admin > Role Management.
2. Click the triangle in the Roles module tab and select "Create Role".
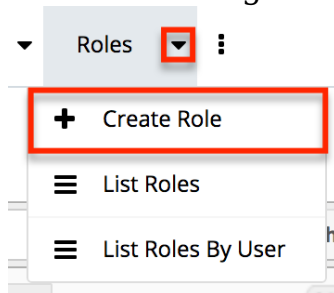
3. Enter a name (e.g. Tags Administrator) for the role then click "Save".
4. On the Role Chart screen, click "Tags" in the module's list to the far left of the page.
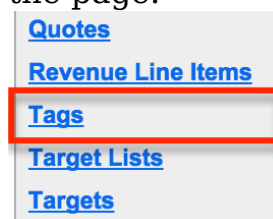
5. The following screen will display the role settings specific to the Tags module. The Access and Access Type columns will default to "Not Set". Click the "Not Set" in both columns and select the following options::

   ◦ **Access** : Enabled

Note: Access Type settings can remain as "Not Set" since the Admin access type will ensure full access to the remaining options.

6. Click "Save" to preserve the changes.
7. Scroll to the Users subpanel on the bottom of the screen and click "Select User". Search and select the user(s) you wish to assign this role to.

8. After selecting the user(s), navigate to the user's profile to view their access information via the Access tab. Confirm that the Tags Administrator role is displayed in the Roles subpanel and the Tag module's access is set to "Admin".

Revenue Line Items	Enabled	Normal	All	All	All	All	All	All	All
Tags	Enabled	Admin	All	All	All	All	All	All	All
Target Lists	Enabled	Normal	All	All	All	All	All	All	All
Targets	Enabled	Normal	All	All	All	All	All	All	All
Tasks	Enabled	Normal	All	All	All	All	All	All	All
Tracker Performance	None	None	None	None	None	None	None	All	None
Tracker Queries	None	None	None	None	None	None	None	All	None
Tracker Sessions	None	None	None	None	None	None	None	All	None
Trackers	None	None	None	None	None	None	None	All	None
Users/Teams/Roles	Enabled	Normal	All	All	All	All	All	All	All
Web Logic Hooks	Enabled	Normal	All	All	All	All	All	All	All

≈ Roles

Select |◁ ◁ (1 - 2 of 2) ▷ ▷|

Name ⇕	Description		
Sales Administrator	Sales Administrator Role	edit ▾
Tags Administrator		edit ▾

Any user assigned to the Tags Administrator role will have the ability to access increased functionality such as creating, editing, deleting, and merging records in the Tags module. For more information on creating roles, please refer to the Role Management documentation.

Working With Tags

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

Menus

The Tags 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 Tags-specific functionality, within this page.

Module Tab Menus

The Tags module tab is typically found by clicking the arrow to the right of the navigation bar tabs 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, 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 tags you most recently viewed. The **Favorites menu** displays the list of tags you most recently marked as favorites.
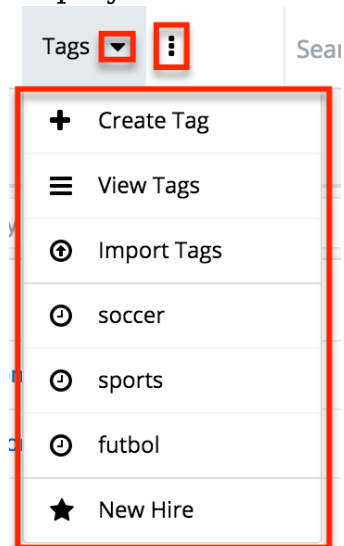
The module tab's Actions menu allows you to perform the following operations:

Menu Item	Description
Create Tag	Opens the record view layout to create a new tag
View Tags	Opens the list view layout to search and display tags
Import Tags	Opens the import wizard to create or update tags using external data

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 in the Application Guide.
- The Tags module may be disabled for your entire Sugar instance. Enable the Tags module and add the Tags field to related module layouts. For

more information on displaying and hiding modules throughout Sugar, please refer to the [Developer Tools](#) documentation.

List View Menus

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

List View Mass Actions Menu

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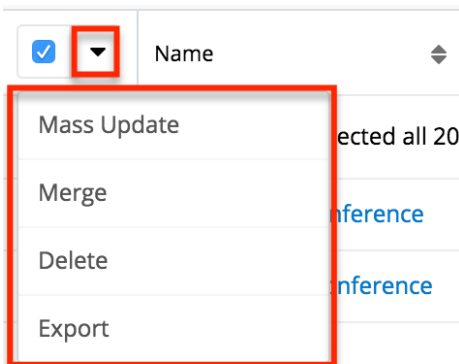
The Mass Actions menu allows you to perform the following operations:

Menu Item	Description
[Mass Update](#)	Mass update one or more tags at a time
[Merge](#)	Merge two or more duplicate tags
[Delete](#)	Delete one or more tags at a time
[Export](#)	Export one or more tags to a CSV file

Note: While the "Find Duplicates" functionality is disabled for all users of the Tags module, users with administrator access to the Tags module can find and merge duplicate tag records via list view. For more information on merging records, refer to the [User Interface](#) documentation.

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 tag directly from the list view.
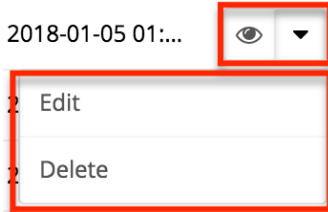
The options in the Record Actions menu allow you to perform the following operations:

Menu Item	Description
Preview	Preview this tag in the intelligence pane
Edit	Edit this tag
Delete	Delete this tag

Record View Actions Menu

The Tags record view displays a single tag in full detail including its relevant fields and subpanels of related records. To access a tag's record view, simply click a hyperlinked tag name from the Tags list view, Tags list view dashlet, or from report results. The record view's Actions menu appears on the top right of the page and allows you to perform various operations on the current record.
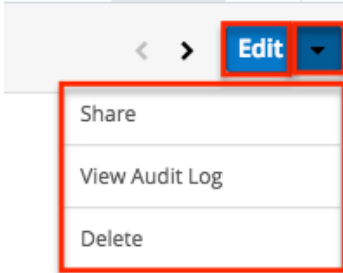
The Actions menu allows you to perform the following operations:

Menu Item	Description
Edit	Edit this tag
Share	Share a link to this tag via email

View Audit Log	View a record of changes to this tag
Delete	Delete this tag

Common Views and Actions

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

Content Link	Description
Creating Tags Basic Tag Creation Importing Tags	The Creating Records section covers the various methods of creating new tag records, including via the Create button in the Tags module and importing a list of tags into Sugar using a .csv spreadsheet.
Viewing Tags Viewing via List View Viewing via Record View Viewing via Recently Viewed Viewing via Dashlets Viewing via Preview Viewing via Reports	The Viewing Records section describes the various methods of viewing tag records, including via the Tags list view and record view, the Recently Viewed menu in the Tags module tab, list view dashlets showing tag information, previewing tags in the right hand side panel, and reports displaying tag data.
Searching for Tags List View Search Creating a Filter Saving a Filter	The Searching for Records section provides an introduction to list view search, which searches and filters within the Tags module. **Note**: For information on using tags as global search filters, please refer to the Tags documentation in the Application Guide.
Tags List View Total Record Count Create Button List View Search Checkbox Selection Mass Actions Menu Favorite Designation Column Reordering Column Resizing	The List View section walks through the many elements of the Tags List View layout which contains a filterable list of all tag 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 Tags list view are described in the List View Mass Actions Menu and List

Column Sorting Column Selection Preview Record Actions Menu More Tags Dashboards	View Record Actions Menu sections of this page.
Tags Record View Favorite Designation Next or Previous Record Actions Menu Subpanels Related Record Subpanels Filtering Subpanels Reordering Subpanels Dashboards	The Record View section walks through the many elements of the 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.
Editing Tags Editing Inline via Record View Editing via Record View Editing Inline via List View Mass Editing via List View	The Editing Records section describes the various methods of editing existing tag records, including inline via the Tags record view, in full edit mode on the record view, inline via the Tags list view, and via the Mass Update option on the list view. **Note**: If the tag's name is edited, all records related to the tag will automatically display the updated tag value.
Deleting Tags Deleting via Record View Deleting via List View Mass Deleting via List View	The Deleting Records section describes the various methods of deleting unwanted tags, including via the Tags record view, an individual record's Actions menu on the Tags list view, and the Mass Actions menu on the list view.
Exporting Tags	The Exporting Records section provides an introduction to the export functionality which allows you to download a list of tags and all their data as a .csv file for use outside of Sugar (e.g. in Microsoft Excel).
Merging Tags Merging via List View	The Merging Records section provides instructions for merging duplicate tags which will combine field values and related records into a single tag. **Note**: Date Created and Date Modified

	field types are not supported when merging duplicate Tag records in Sugar.
[Viewing Tag Audit Logs](#)	The Viewing Record Audit Logs section describes the View Audit Log record view option which displays a history of changes to the tag's audited fields. **Note**: Only the Assigned User Id field is audited for the Tags module and will be displayed in the audit log.
[Favoriting Tags](#) [Favoriting via List View](#) [Favoriting via Record View](#)	The Favoriting Records section describes the various methods of marking tags as favorites, including via the Tags list view or Tags record view. Favoriting a tag allows you to easily access it from list views, dashlets, or the Tags module tab.
[Sharing Tags](#)	The Sharing Records section provides instructions for the Share record view option which composes an email with a link to the tag record. If the recipient is logged into Sugar, clicking the link will bring them directly to the tag's record view.

Last Modified: 2021-02-01 22:11:19