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# Hint User Guide

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# Hint User Guide

## Overview

Sugar Hint is a relationship intelligence service that is available to be purchased and installed on your Sugar instance to make external information available for your contacts, leads, and accounts in Sugar. Data such as social media accounts, work information, and company details are visible for contacts and leads based on their email address and for accounts based on their websites and company names. Users can then quickly import the enhanced data into the Sugar database with a single click.

Hint includes details about the individual (for the contacts and leads modules), the company, a history of your interactions with the individual or company in the [Activity History section](#), and company news in the [News section](#). Hint can also be configured to notify you of news on specific companies using a variety of communication channels including the [Sugar Hint Insights dashlet](#), push notifications, and email.

## Prerequisites

The following prerequisites must be met before Hint can be used:

- Before you can use Hint to retrieve information, either the module loadable package must be installed on your instance (for Sugar 11.0.x and lower) or you must be using Sugar 12.0.x or higher and have a Hint license (Sugar Sell Premier users have Hint automatically installed). Please refer to the [Hint Installation and Administration Guide](#) for more details.
- Hint retrieves data based on specific fields; in particular, contacts and leads need an email address and accounts need a name or website.

## Understanding Hint Data

Hint retrieves data from a third-party provider rather than directly from sources such as social media and news sites. Therefore, Hint's enriched data may not exactly reflect information available by direct navigation to these sources; recent changes may not yet be available in the data set. Currently, Hint's data is strongest and most complete for individuals and companies based in the United States.

## Sugar Hint Panel










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The Sugar Hint panel is composed of four sections outlining details on an account, contact, or lead. It displays information on a company or individual such as company size or contact information and allows you to [import this enriched data](#) into your Sugar instance. In addition, it displays relevant information such as recent news stories and a history of recent activity related to the record in Sugar. The panel is available in the intelligence pane on list view, record view, and Global Search; refer to the [Accessing the Sugar Hint Panel](#) section of this page for more information.

## Enriched Data Section

The top section of the Sugar Hint panel contains enriched data retrieved by Hint on a company or individual. If the enriched data has not already been imported into Sugar, download buttons are displayed next to each piece of information, allowing the data to be imported. To download all of the information at once, there is also a global download button in the top right corner. See the [Importing Hint Data](#) section for more information on importing this enriched data.

**Note:** If a field value has been erased using the Data Privacy module, its value is hidden and it cannot be enriched. See the [Data Privacy](#) documentation in the Application Guide for more information.

Sugar Hint		
	SugarCRM <a href="http://sugarcrm.com">http://sugarcrm.com</a>	
Company Size	570	
Industry	Internet Software & Services	
Company Location	10050 N Wolfe Rd, Cupertino, CA 95014, USA	
Annual Revenue		
Company Description	SugarCRM is a software company based in Cupertino, ...	
NAICS Code	Professional, Scientific, and Technical Services (54)	
SIC Code	COMMUNICATIONS (48)	
FY End		
Year Founded	2004	
Company Facebook	<a href="http://www.facebook.com/7151687461">http://www.facebook.com/7151687461</a>	
Company Twitter	<a href="http://www.twitter.com/SugarCRM">http://www.twitter.com/SugarCRM</a>	
Industry Tags	Information Technology & Services, Technology, SAAS...	
<a href="#">Show less...</a>		

## Related Contacts Section

If [accessing the Sugar Hint panel](#) via the Accounts list view, the Related Contacts section is displayed below the company information. This section lists the three most recently updated contact records related to the account, showing their name, title, and contact information. If there are more than three contacts, a Show More link is displayed at the bottom which opens a Search and Select drawer containing the full list of contacts.

The screenshot shows the 'Accounts (1-20 of 21+)' list view. The first account, 'SugarCRM', is selected. The 'Sugar Hint' panel is open on the right, displaying company details for SugarCRM. Below the company details, the 'Related Contacts' section is visible, showing a contact named Rich Green, Chief Product...

Name	City	Billing Country
SugarCRM		
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
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[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]

**Sugar Hint**

Preview **Sugar Hint**

**Sugar Hint**

**SugarCRM**  
<http://sugarcrm.com>

Company Size 570  
Industry Internet Software & Se...  
Company Loc... 10050 N Wolfe Rd, Cu...  
Annual Reven...  
Company Des... SugarCRM is a softwa...

NAICS Code Professional, Scientific...  
SIC Code COMMUNICATIONS (4...  
FY End  
Year Founded 2004  
Company Fac... <http://www.facebook...>  
Company Twi... <http://www.twitter.co...>  
Industry Tags Information Technolog...

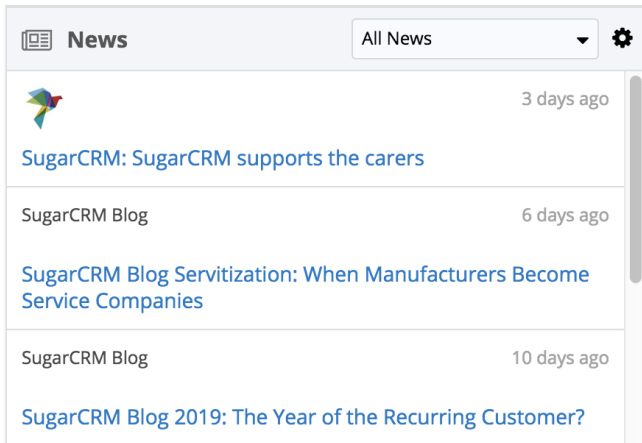
[Show less...](#)

**Related Contacts**

**Rich Green**  
Chief Product... [rgreen@sugarcrm.com](mailto:rgreen@sugarcrm.com)

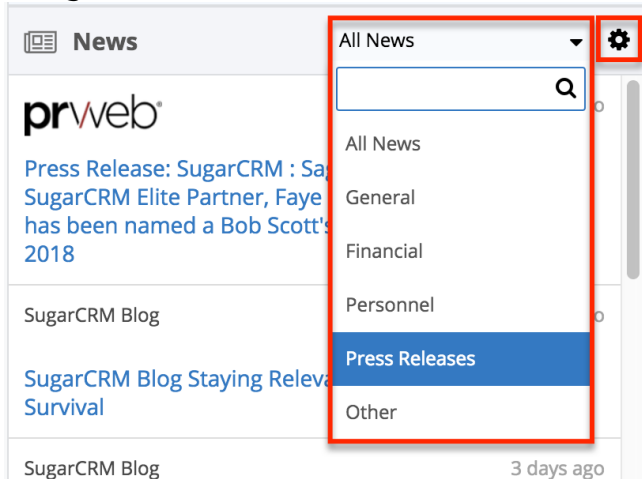
## News Section

The News section on the Sugar Hint panel automatically shows five recent news stories about the account or about the lead or contact's company. Click any headline to open the full article in a new window or scroll down to load additional stories. To see news stories that were released after you opened the Sugar Hint panel, refresh the page.



The news stories can be filtered or searched using the dropdown menu in the top right corner. You can either filter by a category (e.g., Financial or Personnel), or perform a search by entering a keyword into the text field and pressing Return. The search will be applied to all news stories retrieved for the account or company. To clear a keyword search, select the All News category.

The gear icon navigates to the Hint Insights Preference Center where you can configure your notification preferences for news stories. Note that this does not have any impact on the News section of the Sugar Hint panel, which only displays news stories related to the current account. For more information on the Hint Insights Preference Center, refer to the [Hint Insights](#) section of this page.

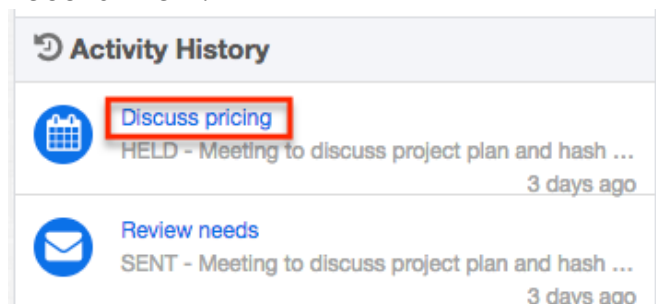


## Activity History Section

The Activity History section appears at the bottom of the Sugar Hint panel. This section shows a history of interactions with the lead, contact, or account, ordered with the most recent on top, in order to give users a quick overview of the past interactions your organization has had with the individual. You can see more

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details about any of the activity records by clicking the record name, opening it in record view.



Hint will display up to 50 of the most recent activity records that match the following criteria:

- **Calls:** Related calls in a status of "Held" or "Cancelled"
- **Meetings:** Related meetings in a status of "Held" or "Cancelled"
- **Emails:** Related emails from the Sugar database
  - **Note:** Emails that are visible in the Emails module but have not been imported to Sugar will not appear in Hint's Activity History.

## Accessing the Sugar Hint Panel

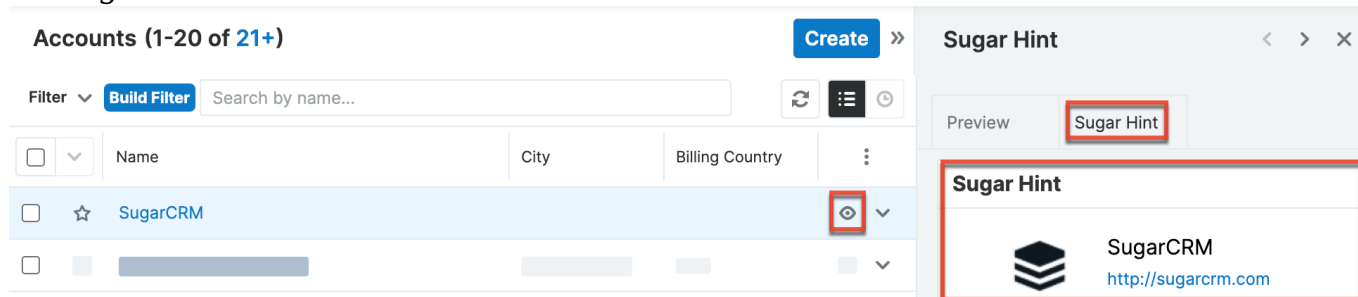
The Sugar Hint panel is available in the intelligence pane when performing the following actions in Sugar:

- By clicking the Preview button on a contact, lead, or account record via the modules' list views, subpanels, and Global Search
- By selecting the Sugar Hint panel on Contacts, Leads, or Accounts record view
- When creating a new contact or lead record and providing an email address then moving focus away from the field
- When creating a new account and providing a company name or website then moving focus away from the field

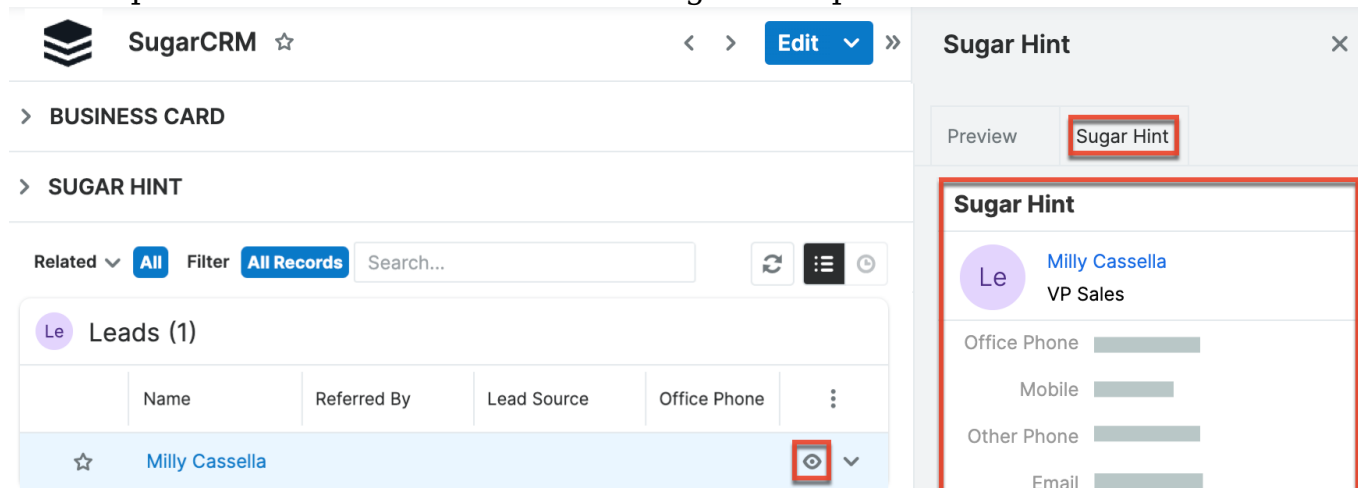
## Accessing via Previews

Once Hint is installed in your instance, using the stock Preview button for contacts, leads, and accounts displays a tabbed view containing both the record preview and the Sugar Hint panel in Sugar's list-view or record-view intelligence pane. The tab that you most recently had open is displayed by default, but you can navigate between the preview and the Sugar Hint panel by selecting the tab you wish to see.

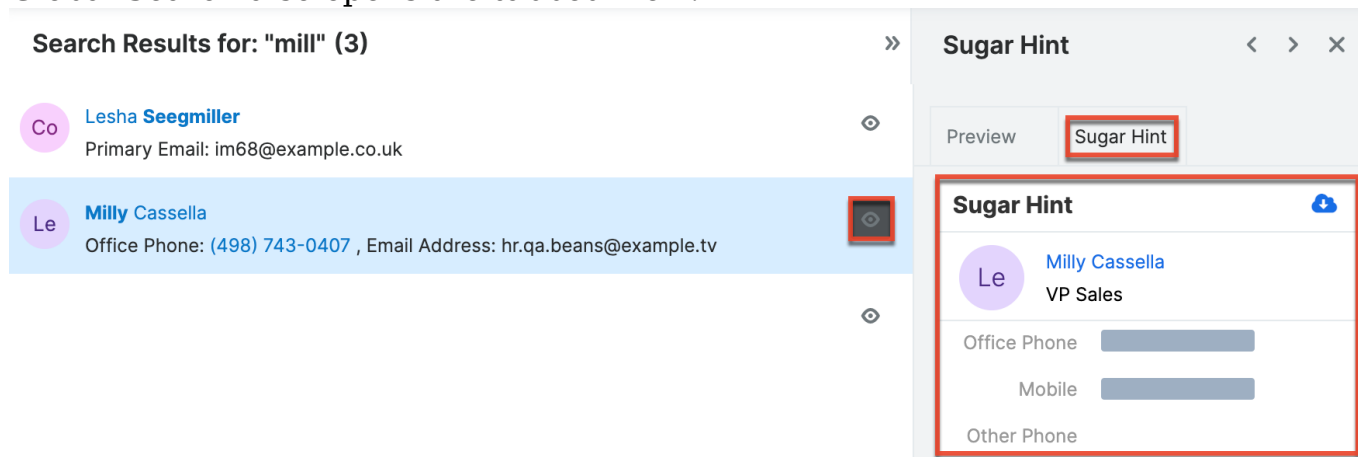
From the Contacts, Leads, or Accounts list view, clicking a record's Preview button opens a tabbed view containing the record preview and the Sugar Hint panel on the right-hand side:



You can also click the Preview button from any Contacts, Leads, or Accounts subpanel to view the Sugar Hint panel. For example, while viewing an account record, you can scroll down to the Leads subpanel and open the tabbed view on a lead to preview the record or view the Sugar Hint panel:



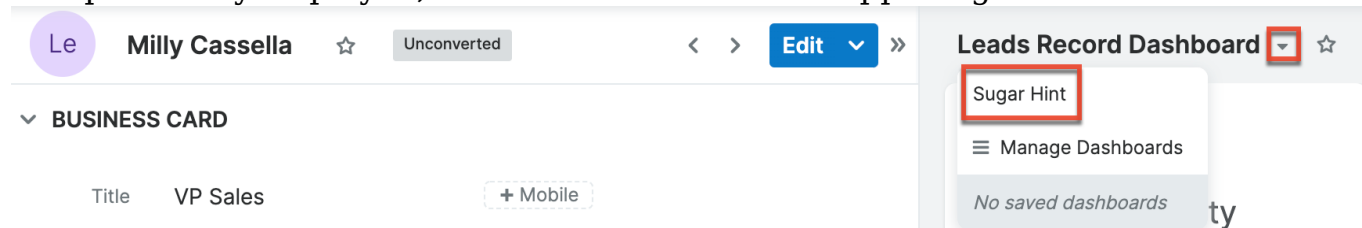
Finally, clicking the Preview button to the right of a contact, lead, or account in Global Search also opens the tabbed view:





## Accessing via Record View

The Sugar Hint panel is also available when viewing a contact, lead, or account in record view. The Sugar Hint panel is automatically added to Contacts, Leads, and Accounts record views; it can be accessed by selecting it from the dashboards dropdown menu. To close the Sugar Hint panel and return to the dashboard that was previously displayed, click the X button in the upper right corner.



## Importing Hint Data

Hint imports external values into several stock Sugar fields as well as to custom fields added by Hint. The following fields in the Contacts, Leads, and Accounts modules are available to import data from Hint:

Field Name	Field Origin	Import for Accounts	Import for Contacts	Import for Leads
Account Name	Stock Sugar			<input type="checkbox"/>
Annual Revenue	Hint		<input type="checkbox"/>	<input type="checkbox"/>
Annual Revenue	Stock Sugar	<input type="checkbox"/>		
Avatar	Stock Sugar		<input type="checkbox"/>	<input type="checkbox"/>
Company Description	Hint		<input type="checkbox"/>	<input type="checkbox"/>
Company Facebook	Hint	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company Location	Hint	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company Logo	Hint	<input type="checkbox"/>		
Company Size	Hint	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company Twitter	Hint		<input type="checkbox"/>	<input type="checkbox"/>
Company	Hint		<input type="checkbox"/>	

Website				
Description	Stock Sugar	<input type="checkbox"/>		
Education	Hint		<input type="checkbox"/>	<input type="checkbox"/>
Education Additional	Hint		<input type="checkbox"/>	<input type="checkbox"/>
Facebook Link	Hint		<input type="checkbox"/>	<input type="checkbox"/>
FY End	Hint	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Industry	Hint	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Industry Tags	Hint	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile	Stock Sugar		<input type="checkbox"/>	<input type="checkbox"/>
NAICS Code	Hint	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Office Phone	Stock Sugar		<input type="checkbox"/>	<input type="checkbox"/>
Other Phone	Stock Sugar		<input type="checkbox"/>	<input type="checkbox"/>
Previous Jobs	Hint		<input type="checkbox"/>	<input type="checkbox"/>
SIC Code	Hint		<input type="checkbox"/>	<input type="checkbox"/>
SIC Code	Stock Sugar	<input type="checkbox"/>		
Title	Stock Sugar		<input type="checkbox"/>	<input type="checkbox"/>
Twitter Account	Stock Sugar	<input type="checkbox"/>		
Twitter Link	Hint		<input type="checkbox"/>	<input type="checkbox"/>
Website	Stock Sugar	<input type="checkbox"/>		<input type="checkbox"/>
Year Founded	Hint	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The custom fields added by Hint are appended to the bottom of the Contacts, Leads, and Accounts record views in a new panel named "Sugar Hint", with the exception of the Avatar field for contacts and leads and the Company Logo field for accounts, which are displayed next to the record's name. These fields can be manually populated or downloaded from the Sugar Hint panel. Please note that the available fields may have been modified by your administrator to suit your organization's needs. For more information on configuring Hint's fields and layouts, please refer to the [Hint Installation and Administration Guide](#).

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> SHOW MORE

▼ SUGAR HINT

Education MA/BA from State Un... + Educa...

Previous ... Chief Product Officer... Compan... 461

## Importing During Contact and Lead Creation

Hint data can be retrieved and imported using the Sugar Hint panel when creating a new contact or lead. Simply type the individual's email address in the Email Address field and click or tab out of the field or hit the Enter key. Any enhanced data that Hint retrieves will be displayed in the Sugar Hint panel to the right. You can download individual field values using the download button adjacent to that field. You can also download all available field values using the download button in the top right corner of the Sugar Hint panel. Add or change any field values as desired, then click "Save" to create the new record.

**Note:** Any values you have typed into Hint's import fields after the Hint data was retrieved will be overridden by values from Hint upon import.

Salutation First Name Last Name

+ Edit Select... Required Cancel Save

▼ BUSINESS CARD

Title Mobile

Department Do Not Call

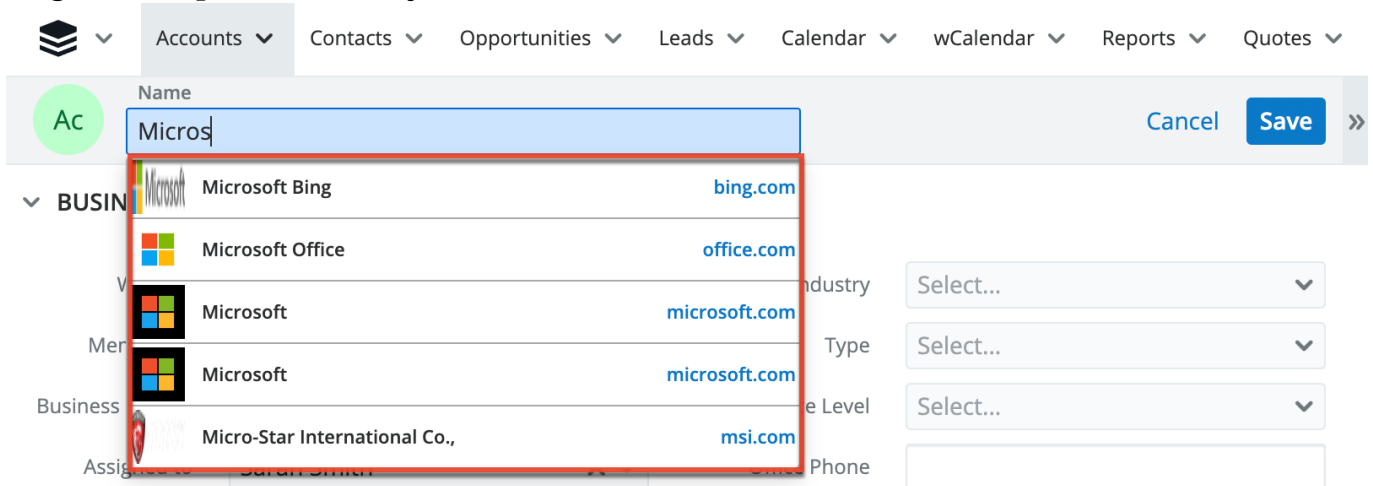
Account Na... Select Account... Business Ce... Select Business Center...

Email Address... beverly.ol ☆ ⓘ -

## Importing During Account Creation

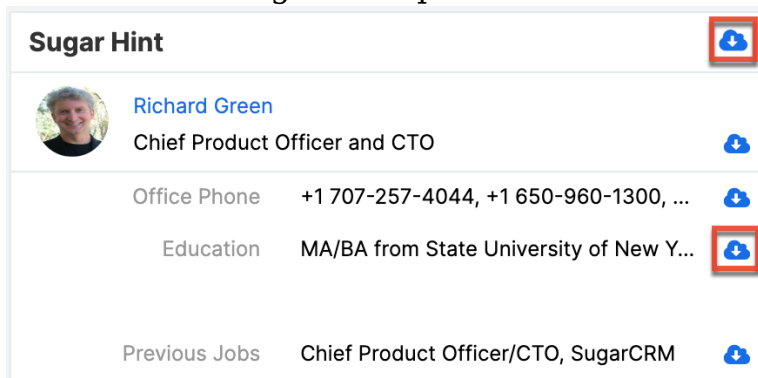
Hint data can be retrieved and imported automatically when creating a new account by filling in the Name field. Start typing either the company's name or website to bring up a list of suggested matches. When you select the desired company in the list of suggestions, Hint automatically populates the fields on record view with the enriched data. If you do not wish to populate all fields, simply click or tab out of the Name field; Hint will still provide the enriched data in the

Sugar Hint panel where you can choose which fields to enrich.



## Importing to Existing Records

In addition to displaying enhanced information about existing contacts, leads, and accounts, Hint allows you to import the information into Sugar. Doing so saves the found values to the record in your Sugar database. You can download individual field values using the download button to the right of that field. You can also download all available field values using the download button on the top right corner of the Sugar Hint panel.



When you click a Download button, a green checkmark will briefly display and the Download button will no longer be visible.

When an existing record's field has a value that is different from the data in the Sugar Hint panel, the download button is available in Hint. If no download button appears next to a field, then the value displayed matches the value in the Sugar record. No download button will appear at the top of the Sugar Hint panel if all of the values displayed are already saved in Sugar and are not being provided by Hint. Note that phone number fields can contain multiple numbers separated by commas. In order for the download button to disappear, the Sugar field must

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match the full list of phone numbers provided by Hint.

## Hint Insights

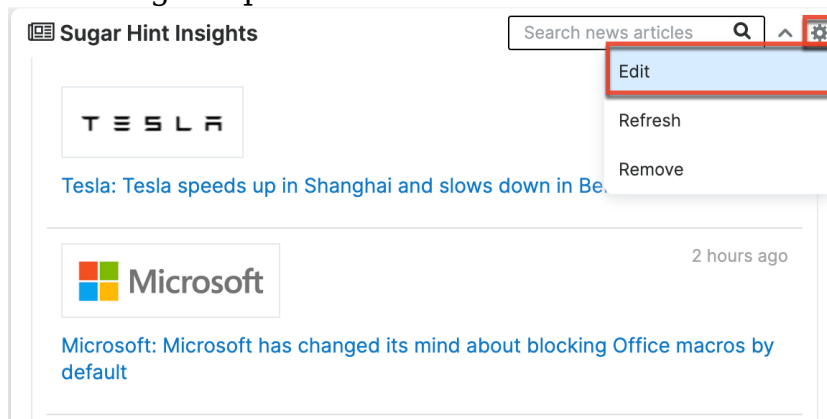
Hint Insights is a service that delivers news relevant to your key accounts using the communication channels that you prefer. Depending on how you configure it, Hint can notify you of newly released news stories for your chosen accounts through the [Hint Insights dashlet](#), pop-up desktop notifications, and emails sent either instantly, once a day, or once a week.

Navigate to the Hint Insights Preference Center by opening the gear menu in the top right corner of the Sugar Hint Insights dashlet and clicking "Edit". From here, you can set up which companies' news stories you are notified of and how you receive the notification.

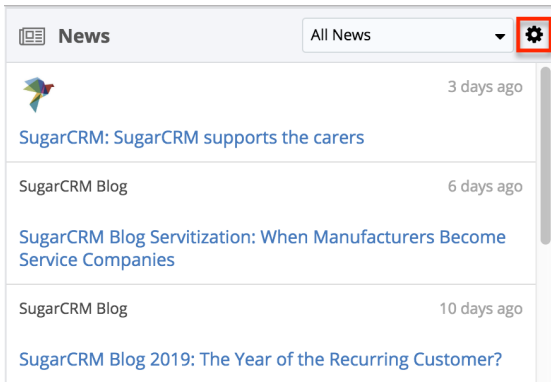
It is also possible to access the preference center via the [News section](#) of the Sugar Hint panel by clicking the gear icon in the top right corner. Note that although you can access the preference center from here, it does not affect what is displayed in the News section, which only displays stories related to the current account, contact, or lead.

Both of these options direct you to the same location where you can configure your notification preferences.

Accessing the preference center via the dashlet:



Accessing the preference center via the News section of the Sugar Hint panel:



The Sugar Hint Insights Preference Center lets you set up one or more rules that specify your notification preferences for different groups of accounts.




**Sugar Hint Insights Preference Center** Cancel **Save** »

**Preferences**

For	<input type="text" value="My Accounts"/>	Show me:	<input type="text" value="All News"/>	Notify me by:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="button" value="-"/>
For	<input type="text" value="Favorite Accounts"/>	Show me:	<input type="text" value="Press Releases"/>	Notify me by:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="button" value="-"/>
For	<input type="text" value="Accounts tagged"/> with <input type="text" value="P1"/>	Show me:	<input type="text" value="Financial"/>	Notify me by:	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="button" value="-"/>
						<input type="button" value="+"/>

Use the plus and minus buttons to add and remove rows; note that at least one row is required even if it is inactive. For new rows, select which accounts the rule should apply to in the first dropdown menu. If choosing accounts with one or more specific tags, a text field will appear where you can start typing to find the desired tag(s). For example, you may wish to apply the rule to only a select few accounts by adding a specific tag to them. Next, select the type of news you want to see for these accounts, then choose your preferred notification type(s). The options are outlined below:

Icon	Notification Type	Description
	Sugar Hint Insights Dashlet	News stories are displayed in the Hint Insights dashlet.
	Pop-up Desktop Notification	News stories are displayed to the user as a desktop notification.  <b>Note:</b> The first time you enable desktop notifications, a pop-up will appear asking you to

		confirm that you want to proceed. Subsequently, your browser will ask for permission to allow notifications from your Sugar instance. You must allow notifications to receive desktop notifications from Hint.
	Instant Email Alert	News stories are sent as an email to the user's primary email address.
	Daily Email Digest	All news stories from the last day are sent in a single daily email to the user's primary email address at 6:00 AM in the user's time zone.
	Weekly Email Digest	All news stories from the last week are sent in a single weekly email to the user's primary email address on Sunday at 5:00 PM in the user's time zone.

**Note:** Email alerts and digests are sent from SugarCRM and do not use the System Email Settings configured in your instance.

If you wish to turn off all notifications for a group of accounts, please disable all of the notification types that are displayed next to it. Because at least one row is required, it is not possible to delete all of the rules. However, you can still ensure that you do not receive any notifications by leaving only one row and disabling all of its notification types.

Once you have finished updating your preferences, click "Save" to preserve the changes. Note that it may take a few minutes for the changes to take effect. In addition, if you disable daily or weekly email digests, any news stories that have already been queued up will still be sent out at the appropriate times, but no new stories will be added to the queue.

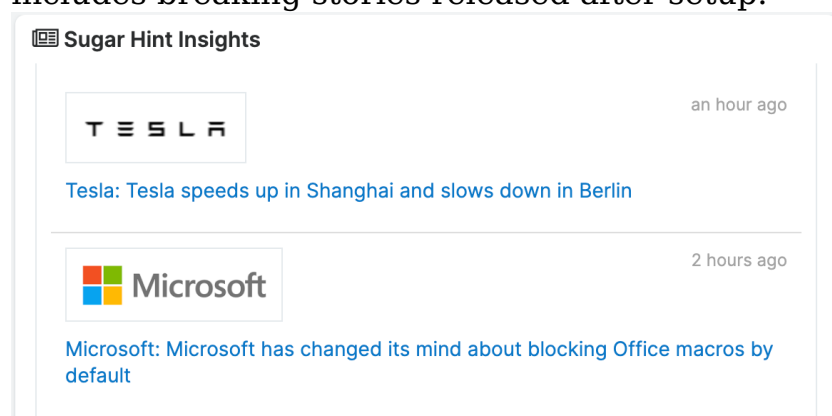
## Sugar Hint Insights Dashlet

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The Sugar Hint Insights dashlet displays breaking news for accounts as configured in the [Hint Insights Preference Center](#) and can be added to any list view, record view, or Home dashboard. If you do not have a Hint license but are viewing a dashboard where the dashboard owner has added the Sugar Hint Insights dashlet, you will see the dashlet but be unable to access the content. If you do have a Hint license, you can add the dashlet and update your Hint Insights preferences before saving. Once the dashlet is added and new stories are displayed in it, click any headline to open the full article in a new window or scroll down to load additional stories.

The dashlet is one of several ways in which Hint Insights can notify you of breaking news; other options include desktop notifications and email. Once you have configured your Hint Insights preferences to show stories in the dashlet, they will begin to appear as they are released. This means that the dashlet only shows stories starting from the moment you turn on the setting. While the setting is enabled, the dashlet is continuously refreshed.

Note that the dashlet is not context-sensitive and always shows the same content regardless of where it is located. In addition, the content may not match that of the [News section](#) of the Sugar Hint panel because the Hint Insights service only includes breaking stories released after setup.



If a new story is released while you are scrolled down in the list, a notification will appear in the dashlet briefly. Clicking the notification returns you to the top of the list where the new story has been added.

The stories can be searched by entering a keyword into the text field in the top right corner and pressing Return or clicking the Search button. The stories with headlines containing the keyword you searched will be displayed, including those not currently loaded in the dashlet. However, note that the dashlet only displays stories that were released after you enabled dashlet notifications for the relevant accounts. To clear a keyword search, click the X button that appears.

The gear icon to the right of the search field opens a dropdown menu with options



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for managing the dashlet. Choosing "Edit" navigates to the Hint Insights Preference Center where you can configure your notification preferences for news stories related to accounts, including what you see in the Sugar Hint Insights dashlet. For more information, refer to the [Hint Insights](#) section of this page.

When using a shared dashboard with the Sugar Hint Insights dashlet on it, the gear icon is not displayed. However, you can access the Hint Insights Preference Center from the gear icon on the Sugar Hint panel's [News section](#) instead. Using a shared dashboard containing the dashlet does not affect your preferences.

**Last Modified:** 2023-02-06 18:36:35