



Sugar Community Edition Application Guide

Version 6.4.0

Sugar Community Edition Application Guide
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Preface

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

Sugar enables organizations to organize, populate, and maintain information efficiently on all aspects of their customer relationships. It provides integrated management of corporate information on customer accounts and contacts, sales leads and opportunities, plus activities such as calls, meetings, and assigned tasks. The system seamlessly blends all the functions required to manage information on many aspects of your business into an intuitive and user-friendly graphical interface.

The system also offers a graphical dashboard to track the sales pipeline, the most successful lead sources, and the month-by-month outcomes for opportunities in the pipeline.

Sugar is based on an open source project, and therefore, advances quickly through the development and contribution of new features by its supporting community.

Welcome to the community!

About this Guide

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

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

Audience

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

Overview

Sugar consists of modules, each of which represents a specific functional aspect of CRM such as Accounts, Activities, Leads, and Opportunities. For example, the Accounts module enables you to create and manage customer accounts, and the Activities module enables you to create and manage activities related to accounts, opportunities, etc. These modules are designed to help you manage customer accounts through each step of their life cycle, starting with generating and qualifying leads to customer support and resolving reported bugs. Many of these steps are interrelated and as a result, each module displays related information. For example, when you view the details of a particular account, the system also displays the related contacts, activities, opportunities, and bugs. You can view, edit, and create this information.

As an administrator, you have the power to implement access control for these modules. You can customize the look and feel of Sugar across your organization. You can even create new modules if needed.

Core Features

Sales Force Automation

- Lead, Contact, and Opportunity management to pursue new business, share sales information, track deal progress, and record deal-related interactions
- Account management capabilities to provide a single view of customers across products, geographies, and status

Marketing Automation

- Lead management for tracking and cultivating new leads
- Email marketing for touching prospects and customers with relevant offers
- Campaign management for tracking campaigns across multiple channels
- Campaign Wizard to walk users through the process of gathering information such as the marketing channel, targets, and budget needed to execute a campaign effectively
- Campaign reporting to analyze the effectiveness of marketing activities
- Web-to-Lead forms to directly import campaign responses into Sugar and capture leads

Customer Support

- Case management to centralize the service history of your customers and monitor how cases are handled
- Bug tracking to identify, prioritize, and resolve customer issues

Collaboration

- Activity management for emails, tasks, calls, and meetings
- Content syndication to consolidate third-party information sources

Administration

- Edit user settings, views, and layouts quickly in a single location
- Customize the application in Studio to meets the exact needs of your organization
- Create custom modules in Module Builder

Installing and upgrading Sugar

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

SugarCRM uses GNU General Public License version 3 for the Sugar Community Edition.

Topics are as follows:

- [Installation prerequisites and guidelines](#)
- [Downloading and installing Sugar](#)
- [Upgrading Sugar](#)
- [Converting Sugar Editions](#)
- [Using the Sugar Silent Upgrader](#)
- [Uninstalling a Sugar instance](#)

Before installing Sugar 6.4.0, ensure that you have the appropriate components installed on your server.

Installation prerequisites and guidelines

This section lists the memory, database, and software requirements for installation.

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

Memory requirements

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

- MySQL Server: 256M or higher
- MS SQL Server: 256M or higher

Database requirements

- If you are using MySQL, install version 5.0 or 5.1 to use with Sugar 6.4.0.
- If you are using Microsoft SQL Server, you need to download the SQL Server Driver for PHP version 2.0 from Microsoft and extract the contents to the `/ext` directory of the PHP installation.

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

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

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

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

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

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

Securing your Sugar installation

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

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

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

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

Downloading and installing Sugar

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

Follow the steps listed below to install Sugar:

1. Install the platform-appropriate (Linux or Windows) version of PHP, web server, and database on your machine.
2. Download Sugar files.
3. Copy the Sugar files to your web server. Check for dependencies and requirements, and set them.
4. Navigate to the `php.ini` file located in your Sugar root directory and set the `global_variables` parameter to `EGPCS`.
5. Restart the web server.
6. Install Sugar Community Edition with the Sugar Setup Wizard.

Note: Restart the web server before proceeding with the installation if you have modified the `php.ini` file.

To download the latest Sugar files

1. Go to <http://www.sugarcrm.com/>
2. Navigate to Support & Training/Support Portal or visit <http://www.sugarcrm.com/sugarshop/downloads.php>
3. Login using your Sugar username and password.
4. Click **Download Purchased Software**.
5. Populate the **Download Key** field in the **Download Manager** page and click **Submit**.
6. Click the link for the appropriate zip file to download it.
For example, SugarCE-6.4.0.zip.

To copy Sugar files to the web server

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

1. Locate the webroot directory on your web server. This directory stores publicly accessible files. Common locations for webroot are:

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

C:\inetpub\wwwroot\ (Windows/IIS)

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

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

2. Unzip the Sugar zip file into your webroot.

This automatically creates a directory within webroot.

3. Rename this directory.

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

- cache
- custom
- modules
- config.php
- config_override.php
- sugarcrm.log

Note: Typically, there are multiple versions of the log file, such as sugarcrm.log, sugarcrm.log.1, sugarcrm.log.2, and so on.

For example:

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

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

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

- apache (Linux/Apache)
- nobody (Linux/Apache)
- IUSR_computerName (Windows/IIS)

Consult your system administrator if you are unsure of your web server user.

5. Ensure that file permissions are set for Read/Execute to **includes** directory and **sugar root** directory (in addition to the already existing list of directories/files) before you view Sugar on your browser.

Using the Sugar Setup Wizard

Use the Sugar Setup Wizard after copying the Sugar files into your web root. The Sugar Setup Wizard is located at

`http://<yourServer>/<yourSugarDirectory>/install.php`.

For example: `http://localhost/Sugar-Full_6.4.0/install.php`

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

- The same Database Admin User should not be used as the Sugar database administrator
- Locale settings should be specified during installation instead of after logging into Sugar

To perform a typical installation of Sugar

1. Launch your browser and enter the URL mentioned above.

This displays the Welcome page.

2. Click **Next**.

The Installer displays installation instructions and requirements to help determine successful Sugar installation.

3. Review the information and click **Next**.

This displays the **Sugar License Agreement**.

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

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

Note: You can modify any of your settings at any time prior to clicking **Install** in the **Confirm Setting** menu. To modify any settings, click the **Back** button on your browser to return to the appropriate page.

5. Select **Typical Install**. Input the license key information in the **Download Key** field. You can also enter it after you have installed the application.

6. Click **Next**.

This displays the **Database Type** page.

7. Select the database that is installed on your system and click **Next**.

This displays the **Database Configuration** page.

- a. Enter the database name. The Installer uses **sugarcrm** as the default name for the database. You can specify a new name.
- b. Enter the **Host Name** or the **Host Instance** for My SQL and SQL Server.

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

- c. Enter the username and password for the Database Administrator and specify the Sugar Database Username.
- d. Ensure that the Database Administrator you specify has the permissions to create and write to the Sugar database.

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

To select an existing user, choose **Provide existing user** from the **Sugar Database Username** drop-down list. To create a new Sugar Database user, choose **Define user**. Enter the database username and password in the relevant fields. Re-enter the password to confirm it. The new user information is displayed in **System Credentials** on the **Confirm Settings** page at the end of the installation process.

- e. Accept **No** as the default value if you do not want the Sugar Demo data. Select **Yes** to populate the database with the Sugar Demo data.
8. Click **Next**.

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

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

This displays the **Site Configuration** page.

10. Enter a name for the Sugar administrator.

The Sugar administrator (default name **admin**) has administrative privileges in Sugar. You can change the default username.

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

This displays the **Confirm Settings** page. The **Confirm Settings** page displays a summary of the specified settings. Click **Back** on your browser to navigate to previous pages if you want to change the settings.

12. Click **Print Summary** for a printout of the settings for your records.

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

13. Click **Install**.

This displays the **Perform Setup** page with the installation progress.

14. Click **Next** when the setup is complete.

This displays the **Registration** page. Registration is optional.

15. Enter the necessary information and click **Send Registration** to register your Sugar instance with SugarCRM; or click **No Thanks** to skip registration.

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

To perform a custom installation of Sugar

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

This displays the Welcome page.

2. Click **Next**.

The Installer displays installation instructions and requirements to determine a successful Sugar installation.

3. Review the information and click **Next**.

This displays the **Sugar License Agreement** page.

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

This displays the **Installation Options** page

5. Select **Custom Install** and click **Next**.

This displays the **Database Type** page.

6. Select the database of your choice and click **Next**.

7. Enter the database name.

The Installer displays **sugarcrm** as default name for the database. You can specify a new name for the database as well.

- a. Enter the **Host Name** or the **Host Instance** for My SQL and SQL Server.

The host name is set to **localhost** by default if your database server is running on the same machine as your web server.

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

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

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

Select **Provide existing user** from the **Sugar Database Username** drop-down list to select an existing user. Select **Define user** to create a new Sugar Database user. Enter the database username and password in the relevant fields. Re-enter the password to confirm it. This new user information displays in **System Credentials** on the **Confirm Settings** page at the end of the installation process.

- c. Accept **No** as the default value if you do not want the Sugar Demo data. Select **Yes** to populate the database with the Sugar Demo data.

8. Click **Next**.

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

9. Click **Accept** to drop current tables or click **Cancel** and specify a new database name.
10. Click **Next**.

This displays the **Site Configuration** page.

11. Enter the URL of your Sugar instance.
12. Enter a name for your system to display on the Sugar application's browser title bar.
13. Enter a name for the Sugar administrator. The Sugar administrator (default name **admin**) has administrative privileges in Sugar. You can change the default name.
14. Enter a password for the Sugar administrator, re-enter it to confirm the password, and click **Next**.

This displays the security options on the **Site Security** page.

15. Select the desired security options and input information in the relevant fields.
16. Click **Next**.

The Installer displays the **Confirm Settings** with a summary of the specified settings.

17. Click **Show Passwords** and **Print Summary** to include the database user and the Sugar admin passwords in the printout.
18. Click **Install**.

This displays the **Perform Setup** page with the installation progress.

19. Click **Next** when the setup is complete.

This displays the **Registration** page. Registration is optional.

20. Enter the necessary information and click **Send Registration** to register your Sugar instance with SugarCRM or click **No Thanks** to skip registration.

This displays the Sugar login page. You can now log into Sugar with the Admin user name and password specified during installation. You can set up Sugar during the login process, or you can set it up after you have logged in. For more information, see [Accessing Sugar and setting your User Preferences](#).

Upgrading Sugar

For Sugar Community Edition, you can upload the Upgrade zip file to your local machine from the SugarCRM website.

Log into the Sugar application to use the Upgrade Wizard. Run a PHP script from the command line on the server where the Sugar instance is installed to use the Silent Upgrader.

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

Compatibility matrix for upgrade

PHP version	5.2.1-5.2.6, 5.2.8-5.2.15, 5.2.17, 5.3.0 - 5.3.6
Databases	MySQL - 5.0x, 5.1 MSSQL - 2005, 2008 Oracle - 10g, 11g (Oracle is supported only for Sugar Ultimate and Sugar Enterprise)
Operating systems	Windows: Sugar runs on any OS that runs PHP Linux: Sugar runs on any OS that runs PHP Mac: Sugar runs on any OS that runs PHP

Upgrade prerequisites

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

Restart the web server and begin the upgrade process.

- Ensure that **LimitRequestBody** is set to a large number or use the default value of 2GB if you are using an Apache web server and **LimitRequestBody** is set in the **httpd.conf** file. Restart Apache and begin the upgrade process.
- Ensure that the **webserver user** has write permissions to the Sugar database. The upgrade to Sugar 6.4.0 will add and replace files in several locations including the Sugar root directory. The **webserver user** must have write permissions for the root folder and all sub-directories during the upgrade process.
- The process of upgrading can take up to 30 minutes. Set the CGI script timeout to more than the default 300 seconds to ensure that the CGI application does not time out if you are using the IIS web server.
- Save PHP files for customized modules (for example, **accounts.php**) in the Customs directory and not within the main module. Existing customizations may be overridden by changes in Sugar 6.4.0 during upgrade.

Using the Upgrade Wizard

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

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

Note: Manual upgrades by file replacements and running the upgrade SQL are not supported.

To upgrade Sugar using the Upgrade Wizard

1. Download the appropriate Sugar Upgrade zip file from the Sugar website to your local machine. For example, download the **SugarPro-Upgrade-6.3.x-to-6.4.0.zip** file to upgrade Sugar Professional from version 6.3.x to 6.4.0. Download the appropriate conversion file to convert to Sugar Professional or Sugar Enterprise.
2. Log into your existing Sugar application as the administrator and click **admin** on the right-hand corner of the page.
3. Click **Upgrade Wizard** in the **Systems** panel of the **Administration Home** page. This displays the **Upgrade Wizard** page.
4. Click **Next**. This displays the **System Checks** page. and Sugar begins the system check process. The Systems Check page indicates that there were no issues if the system check process completes successfully. Issues with file permissions, database, and server settings are listed on the page if the system check process encountered any problems.
5. Click **Next** if the system check is successful. This displays the **Upload an Upgrade** page.

6. Click **Browse**, and navigate to the location of the upgrade zip file and select it.
The path to the file displays in the **Upload an upgrade** field.

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

The system uploads the package and displays it on the page. Use the **Delete Package** button to remove the package if necessary.

8. Click **Next**.

This displays the **Preflight Check** page.

Click **Show Schema Change Script** to view differences in the Sugar databases schema between your current and new Sugar versions.

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

9. Click **Recheck** to rerun Preflight Check. Click **Next** to skip this step.

This displays the **Commit Upgrade** page.

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

10. Click **Next**.

During the upgrade process, Sugar performs a three-way merge between the customized instance on old version, default instance on old version, and default instance on new version. This three-way merge adds any fields that have been added to the default module layouts in the new version to the corresponding module layouts in the existing version, if the module layouts in the old version were not customized through Studio (or in the appropriate upgrade-safe way) prior to the upgrade. The three-way merge also changes the placement of fields in non-Studio-customized module layouts to match the placement in the default module layouts.

Sugar displays the **Confirm Layouts** page as Step 5 of the upgrade process if the existing module layouts have been customized, and there are changes to the default fields and field placement in the new module layouts.

The **Confirm Layouts** page lists the module layouts that have changed in the new version. The administrator has the option of applying the changes to the existing module layouts. By default, all of the listed module layouts are selected to be merged during the upgrade.

For example, in 6.1.0, Sugar added the **Assigned To** fields to the default **DetailView** and **Edit View** layouts for Notes and for Email Templates. If the instance being upgraded has a customized **EditView** layout for Notes, but no customized layouts for Email Templates, the following will occur during the upgrade:

- a. The **Confirm Layouts** page appears as Step 5 in the Upgrade Wizard
- b. The **Confirm Layouts** page displays the Notes module with the **EditView** and **DetailView** layouts. The **Email Templates** layouts do not display on the **Confirm Layouts** page because the existing layouts were not customized.

- c. The Administrator has the option of choosing to merge the changes in the Notes module with the existing customized **EditView** layout.
11. Uncheck the module if you do not want to add the new fields to a module.
12. Click **Next**.

This displays a message confirming that the layouts were successfully merged (if you chose to update your modules).
13. Click **Next**.
14. The **Debrief** page confirms the upgrade installation. Complete the steps for manual merging of files or running SQL queries now.
15. Click **Done**.

This displays the Home page indicating that the upgrade is complete.
16. Click **Repair** and select the **Rebuild Relationships** and **Rebuild Extensions** options in the **Systems** panel of the **Administration Home** page.

For more information, see [Repair](#).
17. Manually merge the files by extracting the skipped file from the patch zip file if you unchecked any files to prevent the Upgrade Wizard from overwriting them. Merge the file installed in the Sugar application directory.

Note: Check the upgradeWizard.log file in the Sugar folder for information on unsuccessful Sugar upgrades.

Locking down the Upgrade Wizard

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

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

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

Converting Sugar Editions

The Upgrade Wizard enables you to convert from one Sugar edition to another. Obtain the Sugar license key from your sales representative for the Sugar edition you want.

The table below lists the supported conversions.

Sugar Edition	Supported Conversion
Sugar Community Edition versions 6.0.x, 6.1.x, 6.2.x, 6.3.x	Sugar Ultimate 6.4.0 Sugar Enterprise 6.4.0 Sugar Corporate 6.4.0 Sugar Professional 6.4.0
Sugar Professional versions 6.0.x, 6.1.x, 6.2.x, 6.3.x	Sugar Ultimate 6.4.0 Sugar Enterprise 6.4.0 Sugar Corporate 6.4.0
Sugar Corporate versions 6.2.x, 6.3.x	Sugar Enterprise 6.4.0
Sugar Enterprise versions 6.0.x, 6.1.x, 6.2.x, 6.3.x	Sugar Ultimate 6.4.0
Sugar Ultimate 6.2.0, 6.3.x	Sugar Ultimate 6.4.0

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

Conversions are a two-step process. First you must upgrade your existing Sugar application from the current version to 6.4.0. You can then convert to the desired Sugar edition using the appropriate conversion zip file.

For example, to move from Sugar Community Edition 6.3.1 to Sugar Professional 6.4.0, you must first convert to Community Edition 6.4.0 using the 6.3.x-to-6.4.0.zip file. You can then convert from Community Edition 6.4.0 to Professional 6.4.0 using the SugarCE-to-SugarPro-Conversion-6.4.0.zip file.

Using the Sugar Silent Upgrader

The Silent Upgrader enables you to avoid some of the limitations that the web application environment may have that prevents the Upgrade Wizard from completing the upgrade. The upload size limit (by PHP and sometimes even by web server), the CGI (or equivalent) timeout limit, and the MySQL (or equivalent) session timeout limit are some of the challenges people run into when upgrading Sugar. The Silent Upgrader either avoids the limitations or better controls the settings in its stand-alone execution environment.

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

To upgrade Sugar using the Silent Upgrader

1. Execute the **silentupgrade.php** script from the command line on the server where the Sugar instance is installed:

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

where:

upgradeZipFile is the full path to the upgrade zip file. For example, SugarCE-Upgrade-6.3.0-to-6.4.0.zip

logFile is the full path to the log file.

pathToSugarInstance is the full path to the instance being upgraded.

adminUser is a valid admin user name.

2. Log into the Sugar application as the administrator and rebuild relationships and extensions using the **Repair** option in the **Systems** sub-panel after upgrading.

Uninstalling a Sugar instance

Follow the steps listed below to uninstall your Sugar instance:

1. Navigate to the location where Sugar is installed on your machine and delete the Sugar root directory.
2. Delete the Sugar database schema from the MySQL or MS SQL server database.

Getting Started

This guide assumes that you have the required resources to access the Sugar application and you are familiar with how to use them. Contact your system administrator for issues and concerns.

Topics include:

- [Prerequisites](#)
- [Accessing Sugar and setting your User Preferences](#)
- [Managing your password](#)
- [Security timeout](#)

Prerequisites

Ensure that you have the following installed and configured on your machine before using Sugar:

- A web browser application on your computer. For information on the supported browsers, see [Supported Platform Components for Sugar](#).
- JavaScript support and cookie support enabled within the web browser used to access Sugar.
- Network access to a server that is running the Sugar software.

Your system or network administrator can provide you with a web address (URL) from which the system can be accessed.

Note: For detailed information on supported versions for all the Sugar components, see [Downloading and installing Sugar](#).

Web browser window controls

Sugar dynamically generates the HTML pages that the web browser displays when you click certain buttons on a web page. Sugar may not display these pages if you use the browser's Back and Forward buttons. It is recommended that you use the **Actions** bar on the module tab to navigate back and forth in the application.

Note: Sugar is designed for a minimum 1024x768-pixel screen display resolution.

Accessing Sugar and setting your User Preferences

Use a supported web browser to access the Sugar application. You will need a user account and login credentials to log into the application. The System Administrator must provide you with your user name and password. You can change your password after you log into Sugar.

Troubleshooting tips

Perform the tasks listed below if you cannot log into Sugar:

- Verify that the username and password are correct, including any upper-case letters
- Verify with your system administrator that you have the correct username and password
- Contact your system administrator to ensure that your account has not been disabled

The **Forgot Password?** link displays in the **Log In** window if the Administrator has enabled this feature. Click this link if you cannot remember your password, enter your username and password in the relevant fields, and click **Submit**. Sugar will send you a link to the page where you can reset your password. Contact the administrator for a new password if this link is not available to you.

Available languages

The default language in Sugar is US English. Administrators can install additional languages, if necessary. Language packs are available at <http://www.sugarforge.org>.

Configuring User Preferences

To access Sugar and configure your User Preferences

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

This displays the Sugar **Log In** page with fields to enter your Sugar credentials. The Sugar Log In page also displays a Language drop-down field from which you can select the language that you want to display in Sugar.

For information on using the Admin Wizard that displays when you login as an administrator, see [Configuring Settings in Sugar](#).

2. Enter your username and password.
3. Click **Log In**.

This displays the User Wizard if you are a regular user. The Sugar User Wizard guides you through the process of entering your Profile information and Locale settings in Sugar. You can change your profile information and locale settings in the Wizard if the administrator has already configured these settings for you. You can also change them from the User Preferences page after you log into Sugar.

The administrator also configures a default SMTP email server to send out email notifications and alerts. An **Email Settings** tab displays in the Wizard if the

administrator has enabled users to use this email server for outgoing emails. Specify your username and password in the **Email Settings** tab to send out emails from that email server.

For information on user preferences, see [Editing your User Preferences](#).

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

This displays your Sugar Home page. You can now begin using the Sugar application. For information on using your Home page, see [Home Module](#).

User session rules

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

- You cannot log into a Sugar instance simultaneously using the same account from two different machines or browsers.
- Two different users cannot log into a Sugar instance separately with two simultaneous sessions using the same username. When you are logged into a Sugar instance, if another person logs in using your credentials, you will be automatically logged out. Hence, to avoid conflict, it is recommended that you do not share your credentials with other users.

Sugar enables you to do the following:

- Concurrently log into Sugar through the Sugar Plug-in for Outlook (or other plug-ins and extensions using Web Service APIs) when logged into Sugar through a browser
- Open an unlimited number of pages of a Sugar instance within a single browser

Editing your User Preferences

When you log into Sugar, your name displays on the top right corner of the page. You can click it to view and edit your default settings. You can also view the list of modules you are allowed to access and your access permissions, such as View, Edit, and Delete, for each module. You can edit some of these settings to suit your requirements, such as the Sugar modules that you want to view when you login. You cannot change your level of access to modules or view modules that you are not allowed to access.

User Profile

This tab displays your profile information such as your full name, your Sugar username, phone number, address, title, and email address.

Employee Information

Employee Information is entered by the administrator and displays information such as your title, your supervisor's name, and your contact information.

Email Settings

The Email Settings section displays your email address and email client. The system administrator has the ability to setup one or more email addresses and

specify your primary email address for automated responses to emails. For information on editing this information, see [To change your email settings](#).

You can send emails automatically if the administrator has setup an SMTP server and has enabled you to use the associated mail account to send emails. Fields for the SMTP username and password are displayed if the administrator has not enabled you to use the mail account. Enter the username and password for your mail account to send out emails using this SMTP server. For information on specifying another SMTP server from the Emails module see [Configuring Email Settings](#).

Password

Use the Password tab to change your password. For more information on changing your password, see [Managing your password](#).

Advanced

The Advanced tab displays the following sections:

User Settings

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

Export Delimiter. This is the character that will be used to separate field values when you export data from Sugar. The default is a comma (,).

Import/Export Character Set. Select a character set from this drop-down list to export and import data and generate Vcards.

The administrator sets the default export settings such as the delimiter used to separate data in export files and the default character set used to import and export data from Sugar. You can override the administrator's settings with your own. The default character set to export data is UTF-8. Specify the appropriate character encoding for your locale if your locale is not US or Western Europe. This ensures that the character set used by the Sugar system to create the exported file is mapped to the correct character set on your machine. For example, MS Windows uses SJIS in Japan. Users in this locale need to select SJIS as the default export character set instead of UTF-8. This character encoding setting is also used when importing data into Sugar.

Show Full Names. Select this option to display your full name in **My Activity Stream** and in the **Assigned to** field in records.

Notify on Assignment. When you enable this option, you will receive an email notification when a record from any of the following modules is assigned to you:

- Accounts
- Contacts
- Opportunities
- Leads
- Meetings
- Calls
- Tasks
- Cases

- Bugs
- Quotas
- Campaigns
- Projects

Reminders. Select a default time interval as a reminder for calls and meetings from the **Reminders** drop-down list.

Mail Merge. You can enable this option to merge data such as names and addresses from Sugar with form letter templates created in Word if you are using Sugar Plug-in for Word. This needs to be enabled by the System Administrator.

You can also assign yourself to the role of a Group User through the **User Management** option on the **Administration Home** page if you are an administrator.

Layout Options

You can change the default settings for the following in this section:

Grouped Modules. Select this checkbox to view module tabs in the navigation bar, based on pre-defined groups. All modules will appear in the navigation bar if this feature is not selected.

Edit Tabs. Enables you to hide modules that you do not require. Move the module from the **Display Tabs** list to the **Hide Tabs** list using the right arrow to hide the module. Use the left arrow to move a module name from the **Hide Tabs** list to the **Display Tabs** list to display the module. These settings can be applied globally by the administrator.

You can change the order in which module tabs display in Sugar. Select the module in the **Display Tabs** list and click the Up arrow to move up a module; click the Down arrow to move down the module.

Number of tabs. Enter a value to specify the maximum number of module tabs to display at the top of page before the overflow menu, indicated by a down arrow, appears.

Subpanel Tabs. Enable this option to group subpanels into tabs in the Detail View of records.

Locale Settings

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

Date Format. Select a format for date stamps from this drop-down list. The default is mm/dd/yyyy.

Time Format. Select a format for time stamps from this drop-down list. The default is in hours.

Time Zone. Set your time zone.

Name Display Format. Specify display of names in records. The default is Salutation, First Name, and Last Name (sfl).

Sugar uses the specified Name Display Format in **Quick Search** to find related records when you enter a character in the **Related to** field within a record, such as a Call or a Meeting. When you type a character in the field, the system performs a quick search of possible values and presents a list of values

starting with that character. If the Name Display Format specifies “s f l”(Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter “A”, the system displays first names starting with “A”. Similarly, if the Name display format specifies “s l f”, then the system displays last names starting with “A”.

User Wizard Prompt. This is available to users with administrator privileges only. Select this to enable new users to go through the New User Wizard during first login.

Currency. Select the currency to use in records from this drop-down list. The default is US Dollar.

Currency Significant Digits. Select the number of digits that display after a decimal from this drop-down list.

1000s separator. Enter the character used to separate thousands. The default is comma (,).

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

First Day of the Week. Specify the first day of the week that displays in Week, Month, and Year Views.

Calendar Options.

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

External Accounts

The following Connectors are available in Sugar:

- LinkedIn — View your LinkedIn contacts at a specific company (Sugar matches the company name in a Sugar field)
- InsideView — View key sales intelligence directly in Lead, Account, Contact and Opportunity records, and get relevant company information, contacts, news, and social media insights within Sugar

You can access the above external applications within Sugar if you have an existing account with the application. For all Connectors except LinkedIn and InsideView, this feature is available out of the box but needs to be enabled by the administrator.

Note: You do not need to have an InsideView account. InsideView identifies user accounts by their email addresses. If you have an existing account with InsideView, you are immediately connected to the their service. You can use their free trial version if you do not have an account with InsideView. For more information, see [Accessing InsideView](#). Also, unlike the other Connectors, LinkedIn and InsideView are enabled by default in all upgrades and new installs. Request your administrator to disable InsideView, if your organization does not want to use it.

Access

This tab displays the module access permissions that the administrator has granted you to perform specific actions such as editing and deleting records. The administrator can enable or disable access to any Sugar module. You cannot edit these settings.

Roles

Scroll down the Access page to view roles that the system administrator has assigned to you. You cannot edit your roles.

Downloads

This tab displays links to Sugar Plugins for Microsoft Outlook, Microsoft Word, and Microsoft Excel. Click the appropriate link to download a plug-in to your local machine. You can then install it on your machine.

Click **Reset User Preferences** and **OK** to revert to your default settings after saving any changes that you made.

Similarly, you can restore the default settings by clicking the **Reset Homepage** after customizing your Home Page.

Editing Email Settings

You can view and edit your default email address. The default SMTP email server is used to send emails from Sugar if this has been enabled by the administrator.

To change your email settings

1. Click your name on the top right corner of the Sugar page.

This displays the **Users** module.

2. Scroll down to the **Email Settings** sub-panel on the **User Profile** tab.
3. Overwrite existing email address with new email address and click **Save** to change an existing email address.

Click the plus (+) sign, populate new field, and click **Save** to add another email address.

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

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

4. Select the email client of your choice from the **Email Client** drop-down list. Select **Sugar Email Client** to send emails using the default email client that the administrator has configured, or **External Email Client** to use an external email client such as Microsoft Outlook.
5. **Email Provider.** This field displays the email server address if you selected External Email Client.

6. Enter the SMTP user name and password for your email account if you selected Sugar Email Client. (You will be using the administrator-configured SMTP server to send out emails).
7. Click **Send Test Email** to send out a test email to ensure that the settings are correct.
8. Click **Save** to save your settings; click **Cancel** to exit the page without saving your changes.

Managing your password

You will be provided with a temporary password when the administrator initially grants you access to Sugar. Change this password after you log into Sugar. Ensure that you choose a password that is easy for you to remember, but difficult for others to guess. You can change your password at any time. For security reasons, it is recommended that you change your password periodically.

To change the password

1. Log into Sugar and click your name on the top right corner of any Sugar page.
This displays the Edit User page.
2. Click the **Password** tab.
3. Input current and new passwords in the relevant fields and click **Save**.

Resetting a forgotten password

The **Forgot Password?** link displays in the **Log In** window if the administrator has enabled the Forgotten Password feature.

Follow the steps listed below to request for a new password if you have forgotten your existing one:

1. Click the **Forgot Password?** link in the Sugar **Log In** window.
2. Input relevant information in the **User Name** and **Email Address** fields and click **Submit**.

This displays a message confirming that your request has been submitted. You will also receive an email with a link to access the **Password Reset** page.

Contact your system administrator for a temporary password if you do not see the **Forgot Password?** link in the **Log In** window. Log into Sugar with the temporary password and change it.

Security timeout

For security reasons, the system automatically logs you out if you do not perform any tasks for a specified period of time. This timeout period is determined by two factors:

- The lifetime of the PHP Session Cookie (PHPSESSID). The default lifetime is until the browser is closed.

- The PHP session timeout period. The default value is 1440 seconds (24 minutes).

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

Click any button on the page when you are ready to resume working. This automatically directs you to the **Log In** page. You can also close the web browser and navigate to the **Log In** page in a new browser window.

Navigating the User Interface

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

The following topics are discussed in this chapter:

- [Overview of the Sugar User Interface](#)
- [Viewing and managing record information](#)
- [Integrating data from external sources](#)
- [Managing Sugar Dashlets](#)
- [Merging Duplicate Records](#)
- [Searching for Information in Sugar](#)

Overview of the Sugar User Interface

The Sugar user interface consists of various modules designed to help you manage customer-related records such as contacts and accounts. Each module, representing a record type, groups the tools and functions needed to perform specific tasks. This enables you to work more efficiently.

You can relate records to one another. For example, a contact can be related to a specific account. When you view a record in Sugar, the system also displays related records. For example, the Detail View of an account displays related contacts in the **Contacts** sub-panel.

When you log into Sugar, the **Home** module displays on the page. Tabs for other modules display alongside the **Home** tab. You can click a tab to open the module to view, create, and manage records.

A drop-down menu is located on the far right of the module bar. You can use this menu to view sets of modules under groups, such as Sales, Marketing, Activities, and so on. This feature is available in all Sugar themes, except the Classic theme.

The Home page displays a list of your activity records such as calls and meetings. It also displays emails, accounts, opportunities, leads, and cases that are assigned to you. For more information, see **Home Module**.

Common Module options

The following options are available from any page in the Sugar application:

- **Quick Create forms.** You can access these forms from the sub-panel of a related record that displays in a record's Detail View. For example, you can create a contact from the Contacts sub-panel of an account's Detail View. Administrators can add, remove, and move fields to customize the Quick Create forms.
- **Global Search field.** This field, located in the top right corner of any Sugar page, enables users to enter a letter or a keyword to search all the modules for matching records. For more information, see [Global Search](#).
- **System links.** System links, located at the top right-hand corner of any Sugar page, are common to all modules. These include your <name>, **Logout**, **Employees**, **Support**, **Help**, and **About**. When an administrator logs in, the **Admin** link is also visible.
 - **Your Name.** Click this link, located at the top right of the page, to view your settings. These settings include your profile information, layout options, and so on. For more information, see [Editing your User Preferences](#).
 - **Employees.** Click this link to view a list of other employees in your organization. This list, maintained by the administrator, displays information such as name, title, phone number, department, and email address. Click a name to view detailed information about the employee. Every user is listed as an employee. However, every employee may not be a Sugar user. For more information, see [Employees Module](#).
 - **Admin.** This link displays only if you login as the administrator. Click this link to access the Administration Home page to perform administrative tasks. For more information, see [Administering Sugar](#).
 - **Support.** Click this link to view the Sugar Support page, which provides links to Sugar documentation, Knowledge Base, FAQs, and training courses to guide you through the process of learning the Sugar application.
 - **Help.** This is a context-aware link to the Application Guide. For example, if you click on the Help link in the **Contacts** module, you will be directed to the **Contacts** section of the Application Guide.
 - **About.** Click this link to learn more about SugarCRM and view version information. This link also provides credits and source code references.
- **Shortcuts menu.** This menu lists options to perform actions such as creating and viewing records, and the last viewed record(s).
- **Last Viewed.** This list displays records that you last accessed within the module, as well as calls and meetings you recently scheduled. Place the cursor on a module tab to view this list. To access a record again, select the record link.

Sugar Modules

The core Sugar modules are as follows:

- **Home.** The Home module provides a quick view of your activities and assigned records in the form of Sugar Dashlets. For more information on this module, see

Home Module. For more information on Dashlets, see [Managing Sugar Dashlets](#).

- **Accounts.** Click this tab to view the **Accounts** module. Use this module to manage your customers. You can track information about an account, including website, address, number of employees and other data. You can link business subsidiaries to the parent organization to show relationships between accounts. For more information on creating accounts, see **Accounts Module**.
- **Contacts.** Click this tab to view the **Contacts** module. Use this module to track people involved in doing business with your organization. You can track contact information such as title, email address, and phone number. Contacts are usually linked to an account. For more information, see **Contacts Module**.
- **Opportunities.** Click this tab to view the **Opportunities** module. Use this module to track potential customers. Opportunities help you manage your selling process by tracking attributes such as sales stages, probability of close, deal amount, and other information. For more information, see **Opportunities Module**.
- **Calendar.** Click this tab to view the **Calendar** module. Use this module to view scheduled activities (by day, week, month, or year) such as meetings, tasks, and calls. You can also share your calendar with your coworkers to coordinate your daily activities. For more information, see [Calendar Module](#).
- **Calls.** Click this tab to view the **Calls** module. Use this module to manage outbound and incoming phone calls between you and your customers. For more information, see [Calls Module](#).
- **Meetings.** Click this tab to view the **Meetings** module. Use this module to manage meetings, including both internal and external invitees, that you schedule or accept. For more information, see [Meetings Module](#).
- **Emails.** Click this tab to view the **Emails** module. Use this module to send and receive emails. You can also automate email management and create email templates for automated responses and email-based marketing campaigns. For more information, see [Emails Module](#).
- **Tasks.** Click this tab to view the **Tasks** module. Use this module to manage a list of actions that you need to complete by a specific date. For more information, see [Tasks Module](#).
- **Notes.** Click this tab to view the **Notes** module. Use this module to manage notes and file attachments. For more information, see [Notes Module](#).
- **Documents.** Click this tab to view the **Documents** module. Use this module to view a list of documents that you can download. You can also upload your own documents, assign publication and expiration dates, and specify the users who can access them. For more information, see [Documents Module](#).
- **Leads.** Click this tab to view the **Leads** module. Use this module to track individuals or companies that are potential customers. When you choose fields in the Web to Leads form in Sugar from the fields in the Leads module, Sugar generates the HTML code to display the form and the code to connect entered field values to the fields in the Leads module. For more information, see **Leads Module**.

- **Targets.** Click this tab to view the **Targets** module. Use this module to track and manage targets. For more information see [Targets Module](#).
- **Target Lists.** Click this tab to view the **Target Lists** module. Use this module to create target lists and to track and manage mass marketing campaigns. For more information see [Target Lists Module](#).
- **Campaigns.** Click this tab to view the **Campaigns** module. Use this module to create and manage marketing campaigns. You can implement and track telemarketing, mail, or email-based marketing campaigns. For more information, see [Campaigns Module](#).
- **Cases.** Click this tab to view the **Cases** module. Use this module to help Customer Support manage product problems and inquiries by tracking information for each case such as its status and priority, the user assigned, as well as track related open and completed activities. For more information, see [Cases Module](#).

In addition, Sugar provides the following modules, which your administrator can make available to you:

- **Projects.** Click this tab to view the **Projects** module. Use this module to track and manage tasks for multiple projects. Tasks can be assigned to different users and assigned estimated hours of effort. You can update information as tasks progress or are completed. For more information, see [Projects Module](#).
- **Bug Tracker.** Click this tab to view the **Bug Tracker** module. Use this module to report and track bugs associated with a product. Customer support representatives can manage software-related support problems or inquiries to completion by tracking information for each bug such as its status and priority, resolution, assigned user, release of software involved, type (defect or feature) as well as track related activities. For more information, see [Bug Tracker Module](#).

Grouped Modules

Users have the option to view modules as individual module tabs, or as sets of modules belonging to one of the following groups:

- Sales - Home, Accounts, Contacts, Opportunities, and Leads
- Marketing - Home, Accounts, Contacts, Leads, Campaigns, Targets, and Target Lists
- Support - Home, Accounts, Contacts, Cases, and Bug Tracker
- Activities - Home, Calendar, Calls, Meetings, Emails, Tasks, and Notes
- Collaboration - Home, Emails, and Documents

To view individual module tabs

1. Mouse over the All tab located next to the grouped module tabs.
2. Select the individual module tab listed under the All tab.
3. Click the double right arrows >> located under the All tab to the right of all the modules to view more modules.
4. Select the individual module you want to view.

Viewing and managing record information

Every module represents a record type such as accounts or opportunities. Sugar provides three types of views for every module: List View, Detail View, and Edit View.

List View: The List View displays links to individual records in a table format. By default, Sugar sorts records in descending order of their creation date. The List View also displays other relevant information such as the name, email address, and phone number for each record. You can change the default view by adding or removing columns depending on the information that you want to view. For more information, see [Searching for Information in Sugar](#).

You can click a record name to view its details. Alternatively, if you have Edit permissions, you can click the Edit icon located next to the record name to navigate to the Edit View.

The **Actions** drop-down list, located above the Name column in List View, provides options to perform actions such as Delete, Email, Mass Update, Merge, Add to Target List, and Export one or more records.

Sugar paginates long List Views. Click any column name that has a double-arrow icon beside it to sort the list. Click the column name again to reverse the sort order.

Detail View: The Detail View displays available information such as the record name, modified date, and related records. The related records are displayed in the separate sub-panels. For example, a Contact's Detail View displays sub-panels for related Activities, History, Documents, Opportunities, and so on. The Detail View enables you to edit, duplicate, find duplicates, manage subscriptions, and view change log for the record. You can also create, edit, and delete related records in the sub-panels.

Edit View: The Edit View enables you to update existing information and add more details if needed.

To view and edit a record

1. Click a record name in a module's List View, to see its Detail View.
2. Click **Edit** in the record's Detail View to edit the record.
3. Input the required information and click **Save**.

Click **Cancel** to exit the Edit View without saving your changes.

To manage related information in sub-panels

The Detail View of a record displays related information in sub-panels. Each sub-panel consists of rows to list links to records. You can add more records to the list, if necessary. This feature enables you to quickly associate multiple records. For example, you can associate more than one contact with an account.

- To minimize a sub-panel, click the arrow located to the left of a sub-panel's name. This hides the sub-panel, but still displays its name and the arrow icon. Click the arrow icon to display the sub-panel.

- To move a sub-panel to a different location on the page, mouse over the sub-panel name, click and drag the panel to the desired location on the page.
- To create a new record, click **Create** below the sub-panel name. This displays the the Quick Create form. Input required information and click Save. Click Full Form to include additional details and click Save.
- To choose a record from an existing list, click Select above the sub-panel.
A list of available records for the sub-panel displays in a separate window.
- To select one or more records from the list, click the box adjacent to the record name and then click Select.
- To delete a related record, click the **rem** icon located to the extreme right of the record row, and click **OK**.

Tracking User Activity

The Last Viewed bar displays recently accessed records, as well as calls and meetings you recently scheduled.

Creating and Managing Records

You can access a module only if the administrator grants you permission. Your ability to perform actions within a module, such as creating, editing, and deleting records also depend on the access permissions that the administrator grants you.

Sugar displays existing records on a module's Home page. You can see this List View when you select the **View** option from the module menu.

Assigning Records to Users

When you create a record, by default, you are the user assigned to manage it. You can change the user assignment if required. When a record is assigned to a user, Sugar sends an email notifying the user. You can view the assigned user from the record's Detail View and Edit View.

To assign users to records

1. Select the module in which you want to create a record.
2. Select **Create** from the **Actions** bar on any page within the module. For example, to create a record in the **Accounts** module, choose **Create Account**.

Or

Click the Create icon located on the top right of any page within the module.

3. Enter the record name.
Sugar automatically assigns this record to you.
4. To change the assigned user, enter the user's name, or click the **Select** button to select it from the **Users** list; if you do not want to assign a user, click the **Clear** button to remove the existing user name from the field.
5. Click **Save** to save the record.

To manage record assignments

1. To edit or delete an assigned user, click the record name in the List View.
This displays the Detail View of the record.
2. Click **Edit** in the Detail View.
This displays the Edit View of the record.
3. To assign your record to a different user, replace your name with the appropriate user's name. Alternatively, click **Select** and choose from the Users List.
4. Click **Save**.

Tracking and managing record History

The Detail View page of every record displays a History sub-panel that enables you to track record-related activities such as meetings, notes, attachments, and archived emails. Each row in the panel displays icons to edit or remove a record. You can also use this sub-panel to create and record new activities.

To track and manage record history

1. To view the details of a listed note, meeting, attachment, or email, click its title.
2. To sort records in ascending or descending by date, click the Up or Down arrow located next to the **Due Date** column.
3. To add a note or to attach a file, click **Create Note or Attachment**. For more information, see [Creating Notes and Attachments](#).
4. To archive an email, click **Archive Email**, copy the email's contents into the Email form, and save it.
5. To view a summary of all the listed records, such as subject, status, and date, in a separate window, click **View Summary**.
6. To edit or delete a record, click the appropriate **edit** or **rem** icon respectively.

Editing and Deleting Multiple Records

Most of the modules provide a **Mass Update** sub-panel on their home page that enables you to edit or delete one or more of the listed records simultaneously. This feature is useful to update information shared by several records such as the assigned user. The fields that you can edit vary depending on the module. For example, in the Contacts module you can change the related account.

To edit or delete multiple records

1. To edit information, in the module's List View, select the records that you want to edit.
2. From the **Actions** drop-down list, select Mass Update to view the **Mass Update** sub-panel.
3. Make your changes and click **Update**.

To reassign the record to a different user, click **Select** to choose a new user from the Users list. Other fields that display in this panel vary depending on the module.

4. Click **Update** to save your changes.

The selected records are updated.

Integrating data from external sources

You can bring data into Sugar from external applications using Sugar Cloud Connectors.

Typically, you use the import functionality to add a large volume of data from an external system. You can also use Connectors to view and add data to a Sugar record from third party data providers.

This section discusses the following Connectors: LinkedIn and InsideView.

Integrating data through a Connector

To integrate data through a Connector

Follow the steps listed below to integrate data through a Connector:

1. Navigate to the record's Detail View.
If the system administrator has enabled the LinkedIn Connector for the module, Sugar displays its symbol next to the account name.
2. Point the cursor at the LinkedIn symbol in the Sugar record, and from the pop-up window, select the connection that you want to view.

Accessing InsideView

You can access InsideView information only for the modules that have been enabled by your administrator. Sugar allows the following modules to be enabled for InsideView access:

- Accounts
- Contacts
- Leads
- Opportunities

To view InsideView information

Follow the steps listed below to view InsideView information related to a record:

1. Go to a module that has been enabled for InsideView access.
2. Select a record from the module's List View page.
This displays the record's Detail View page.
3. Scroll down to the InsideView subpanel in the Detail View page to access InsideView information on the record.

Click the up or down arrows next to the InsideView link to hide or display the InsideView panel within the records in the module.

4. Read the **terms of use** and **privacy policy** and select the checkbox if you are accessing InsideView for the first time.
5. Click **Get Started**.

When you access the Detail View of Accounts, Opportunities, and Leads, InsideView performs a search based on values in the Account Name field and displays the results in the InsideView panel. For the Contacts module, InsideView searches for the Contact name and displays the results in the InsideView panel. You can narrow down search results by adding the Company name in the search field provided in the InsideView panel.

Note: The extent and depth of information that you can access in InsideView depends on your InsideView subscription. For more information, see <http://www.insideview.com/cat-products-difference.html>

Managing Sugar Dashlets

Sugar Dashlets are user-configurable panels that enable you to customize your Home page to view information of your choice. You can edit, add, and delete Sugar Dashlets.

A Sugar Dashlet displays a list of records similar to a module's List View. You can add Sugar Dashlets for modules, charts, websites, and tools such as **My Activity Stream** and **Team Notices**. You can filter records based on criteria such as date, status, and subject, and specify the fields you want to view. You can add a Dashlet to your Home page for easy access to records that you have marked as your favorites.

My Activity Stream enables users to notify each other immediately when one of them creates or modifies a record. User Feed enables users to post their status along with external links, images, and YouTube videos. For more information, see [My Activity Stream](#).

Jot Pad enables you to add a text area to your Home page to jot down tasks, personal or business-related, that you need to complete.

You can add multiple Sugar Dashlets of the same kind and configure each one differently. For example, you can add more than one Activity Dashlet. By default, you can add a maximum of ten Sugar Dashlets on your Home page, but the administrator can change this setting. You can also move a Sugar Dashlet to a different location on the page.

Note: Check with your administrator to ensure that the functionality has been enabled if you cannot add or move Sugar Dashlets.

To add Sugar Dashlets

1. Click the **Add Dashlets** button on the Home page.
This displays the **Add** menu in a separate window.
2. To add a module Sugar Dashlet, select the module on the **Modules** tab.

You can add multiple Sugar Dashlets of the same type and configure each other differently. For example, you can add two Sugar Dashlets for Accounts and display different columns, filters, and so on.

3. Select a chart from the **Charts** tab to add a chart Sugar Dashlet.
You can add a chart Dashlet to your Home page or to the Dashboard. The **Charts** tab displays pre-defined report charts under **Basic Charts**.
4. To add a Jot Pad, or My Activity Stream, select it from the **Tools** tab.
5. Enter the URL in the appropriate field on the **Web** tab and click **Add** to add an external website or a news feed.

This displays the Dashlet on your Home page.

To edit Sugar Dashlets

1. Go to a Dashlet (for example, My Calls) and click the Edit Sugar Dashlet icon on the top right corner of the Dashlet.
This displays the <Dashlet name> : Options pop-up window. You can change the Dashlet's title, the number of rows that it displays, and the fields that display as columns. You can also filter records that you want to view in the Dashlet, based on the subject, assigned user, due date, and so on. Click Save after you have made the desired changes to the Dashlet settings.
2. To sort a Dashlet by a column such as user name or start date, click the column name on the Home page.

To manage Sugar Dashlets

1. To move a Sugar Dashlet, click anywhere on its title and drag and drop the Dashlet to its new location.
2. To remove a Sugar Dashlet, mouse over the title bar, click the **Delete** icon and then then click **OK** in the delete confirmation pop-up box.
3. To manually refresh a Sugar Dashlet, mouse over the title bar, and click the **Refresh** icon.

My Activity Stream

The My Activity Stream Dashlet on your Home page enables users to notify each other immediately when one of you creates a new contact, lead, opportunity, or case. Users are also notified when a lead is converted and when a case or opportunity is closed.

My Activity Stream also enables you to post your status along with external links, images, and YouTube videos.

Note: If you select the Show Full Name option in your User settings, your full name will display in **My Activity Stream** entries.

To add a My Activity Stream Dashlet

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

This displays the **Add** pop-up window.

2. Select **My Activity Stream** from the **Tools** tab in the **Add** pop-up window.

This displays the **My Activity Stream** Dashlet on the selected tab of your Home page. You will see your username and a field to enter the status information to post, if User Feed is enabled.

3. To post an external link, image, or YouTube video in the **My Activity Stream** Dashlet, select **Link**, **YouTube**, or **Image** from the drop-down list under your name; enter the URL or path in the field displayed and Click **Post**.

This displays the posted information on the Home page for all users. When you perform an action such as creating a contact or converting a lead, the information automatically displays in the **My Activity Stream** Dashlet.

- 4.

Merging Duplicate Records

You can merge duplicate records into a single record to update your data. You can select which fields you want to merge and when the process completes, the system deletes the duplicate records. This ensures that there is no confusion and that your users are accessing information from only one source. Before the duplicate records are deleted, related information such as activities, history, contacts are moved from the duplicate records to the primary record.

You can merge records in the following modules: Accounts, Contacts, Leads, Opportunities, Cases, and Bugs.

If you already know of the duplicate records that you want to merge, you can do it from the module's List View. If you need to search for duplicates of a record and then merge them, you can do so from the record's Detail View.

To merge duplicate records from the List View

1. Select two or more duplicate records on the module's home page, and click the **Merge** link from the **Actions** drop-down list.

The **Merge Records** page displays fields from the primary record on the left and fields from the duplicate records on the right.

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

2. Click **Set as Primary** to specify one of the duplicate records as the primary record.

This moves the record to the left column.

3. Click the << button to replace a field in the primary record with a field from a secondary record.

4. Click **Save Merge**.

This merges the selected fields, moves all the related information to the primary record, and deletes the duplicate records.

To merge duplicates from the Detail View

1. Click a record in the List View to navigate to its Detail View.
2. Click **Find Duplicates**.
This displays the **Find Search Records to Merge With** page.
3. Set filters in the **Find Search Records to Merge With** page to specify the field that you want to search for. For example, you can search for records that have the same billing address or phone number.
4. Select one or more filters and click **Next Step**; Click the Trash icon located next to the field name to remove a filter.
This displays the Records Found To Merge With page.
5. Select the records that you want to merge and click **Perform Merge**.
This displays the **Merge Records** page.
6. Merge records as described in [To merge duplicate records from the List View](#).

Searching for Information in Sugar

You can search for information across Sugar or restrict it to a specific module. Sugar offers the following Search types:

- Global Search
- Basic Search
- Advanced Search

Global Search

You can perform a Global Search on all the modules enabled for Global Search by the system administrator. You can also add or remove modules enabled by the administrator to search on. For more information, see [To add or remove modules from Global Search](#).

Administrators can select the modules that users can search on when using Global Search. This includes both standard and custom modules that have been deployed in Sugar. For more information, see [To Enable/Disable modules for Global Search](#).

Global Search looks for one field at a time. For **Contacts**, you can enter the first name, last name, or the full name in the **Search** field. You can also enter a letter to find all records whose names contain that letter. For example, if you enter “a”, Sugar will search for all records that start with the letter “a”.

Global Search may or may not be case-sensitive depending on your database configuration. In general, Global Search on Sugar installations running on the MySQL database is not case-sensitive; Global Search on Sugar installations running on Oracle is case-sensitive, by default.

Enter a letter or a keyword in the **Search** field and click **Enter** or **Search** icon to perform a Global Search.

Sugar appends the % wildcard character when searching text fields. For example, searching for “Acme” will match **Account** names such as Acme Industries or Acme Funds. Searching for “%Acme” will also match account names such as ABC Acme Industries.

The search result lists records for the module from which you perform the search at the top of the list, followed by records from other modules. For example, if you perform a global search from the **Opportunities** module, matching opportunities are listed first.

Click the **Show All** link that displays at the bottom of the Search result list to view the full search results from each module in separate panels.

To add or remove modules from Global Search

1. Click the **Search** button located next to the Global Search field.
This displays a page with the message: There were no results found. Please search again.
2. Click the **Advanced** link next to the **Search** button on this page.
3. Drag and drop module names between the Enabled Modules and Disabled Modules columns to add or remove modules from Global Search.

Basic Search

You can perform a basic search based on record name from the Search form in the List View of most modules.

- To perform a basic search, enter the record name, or the first letter of the name in the Search field and click **Search**. When searching for contacts, you can enter the first name, last name, or full name.
- To find only records assigned to you, select **My items**, and then click **Search**.
- Click **Clear** to clear the search filters.

To edit or delete records in the search results, see [To edit or delete multiple records](#).

Advanced Search

Click **Advanced Search** for more filtering options in your search results. The search fields are context-sensitive and will vary depending on the module you are searching.

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

Note: Numeric search strings match anywhere in a field. All matching records are displayed in a series of paginated lists.

Advanced Search also provides the option to save search criteria and related search results as Saved Search.

Saving Search Criteria and Layout

Saved Search and Layout option enables you to specify information you want to find and the layout of the search results. You can save the search results in the specified layout for future use. For example, you can view or hide details such as the record name, assigned user. You can also sort the results in ascending or descending order.

You can save an unlimited number of search results. The **Saved Searches** drop-down list displays the last saved search at the top of the list.

To save and manage search criteria

1. Enter a name for the search results in the **Save this search as** field and click **Save**.
This displays the name in the **Saved Searches** drop-down list.
2. Select a saved search from the **Saved Searches** drop-down list in the module's home page to view a saved search.
3. Select the saved search from the drop-down list, change the criteria as needed in the fields above, and click **Update** to modify a saved search.
4. Select a saved search in the **Saved Searches** drop-down list, click **Delete**, and **OK** to delete a saved search.
5. Select a column from the **Hide Columns** list and use the left arrow to move it to the **Display Columns** list to add a column to the List View.
6. Select a column from the **Display Columns** list and use the right arrow to move it to the **Hide Columns** list to remove a column from List View.
7. Use the Mass Update sub-panel to edit or delete multiple records in the search results. For more information, see [To edit or delete multiple records](#).

Home Module

When you log into Sugar, you will see your Home page. Tabs for other modules display alongside the Home tab. Other users do not have access to your Home page.

The Home page displays a collection of Sugar Dashlets that display information related to your activities such as meetings and calls. It also displays records assigned to you, such as Accounts, Opportunities, and Cases. Sugar Dashlets are user-configurable panels that you can add, remove, and move as needed. For more information, see [Managing Sugar Dashlets](#).

- **My Calls.** Lists phone calls set up by you or includes you, including the subject of the call, the duration, and the start date.
- **My Meetings.** Lists invitations to meetings set up by you or others including the subject of the call, the duration, and the start date.
- **My Leads.** Displays a list of leads that you created, including the name, business phone number, and date created.
- **My Top Open Opportunities.** Lists the top five opportunities sorted by the amount. Opportunities with a status of Closed-Lost or Closed-Won are not included. You can display up to ten opportunities in this Dashlet.
- **My Accounts.** Displays accounts assigned to you, including the account and phone numbers.
- **My Open Cases.** Displays a list of customer issues assigned to you for resolution, including the case number, subject, priority, and status.
- **My Activity Stream.** Notifies you when other users create a new contact, lead, opportunity, or case. You can also view Twitter and FaceBook feeds of your friends in this Dashlet.
- **My Emails.** Lists your unread emails that were imported into Sugar from external email accounts.

Viewing and managing predefined charts

A chart is a graphical display of a report. You can add charts based on predefined reports on your Home page. When a report is updated, the chart is automatically updated as well.

Sugar provides several charts based on predefined reports. You can use these charts to view sales and opportunities for your organization. Each distinctively colored area on a chart is linked to the data set that it represents. You can click any colored area to drill down to the underlying data.

You can edit predefined charts to suit your requirements, but you cannot delete them. Click the **Edit** icon to modify a chart. Click the **Refresh** icon to refresh the view after an update. Click the **Refresh** icon above the chart to recalculate the data source for a specific chart.

The following predefined charts are displayed on your Home page:

- **All Opportunities by Lead Source by Outcome.** This is a horizontal stacked bar chart that displays total opportunities for each lead source. Each bar is made up of multi-colored segments that represent the outcome proportions for that lead source.
- **All Opportunities by Lead Source.** This is a pie chart that groups total sales opportunities by each lead source.
- **Campaign ROI.** This is a bar chart that displays the return on investment (ROI) for a campaign.
- **Pipeline By Sales Stage.** This is a horizontal bar chart that displays the total dollar amounts for all your opportunities grouped by sales stage.
- **Outcome by Month.** This is a vertical stacked bar chart in which each bar displays the total sales pipeline for each month. Each bar is made up of multi-colored segments that represent the outcome proportions for the pipeline in that month.

Modifying the Home module

You can add Sugar Dashlets to your Home page as described in [Managing Sugar Dashlets](#). You can revert to the default Home page setting at any time. This will delete any new Sugar Dashlets that you added to the Home module.

You can revert to the default Home module setup at any time by clicking **Reset Homepage** in your **User Settings**

To revert to default Home page settings

1. Click your name located at the top right-hand corner of the page.
This displays your Edit user page.
2. Click **Reset Homepage**, and **OK** in your Edit user page.

Leads Module

Leads are early contacts in the sales process. Use the Leads module to create, manage, and track sales leads or unqualified opportunities along with related activities, sales campaigns, and history.

You can associate a lead with any type of campaign to track the effectiveness of the campaign in generating opportunities for your organization.

Creating Leads

You can create Leads in Sugar and you can also import them into Sugar using a comma-delimited, tab-delimited, or custom delimited file. When you import Leads, you can select the default value for the Lead Source, such as Direct Mail, Trade Show, and so on from the drop-down list in the **Default Value** column.

Select **Import** from the **Leads** tab to import Leads. For more information on importing data, see [Importing Data](#).

To create a lead

1. Select **Create Leads** from the **Actions** bar.
Or, click the **Create** link in the far right corner of the List View or Detail View of any Leads page.
2. Enter the following information in the **Leads Overview** section:
 - First Name.** Enter the lead's first name.
 - Last Name.** Enter the lead's last name.
 - Title.** Enter the business title of the lead.
 - Department.** Enter the department to which the lead belongs.
 - Account Name.** Enter the name of the company related to the lead. When you convert the lead, you have the option to create the account as a related record.
 - Office Phone.** Enter the lead's office phone number.
 - Mobile.** Enter the lead's mobile phone number.
 - Fax.** Enter the lead's fax number.
 - Website.** Enter the website of the individual's organization.
 - Primary and Other Address:** Enter the primary address and **Other Address** information. To copy the other address from the primary address, select the **Copy address from left** checkbox.

If you select a lead from the Lead list, the system automatically enters the address. You can edit this information if needed.

Email Address: Enter the email address for the organization and your contacts and campaign targets within the organization. Select **Invalid** to indicate an incorrect email address. If you sent out campaign emails this contact and the individual chose to opt-out of receiving them, select **Opted Out**.

To add an additional email address, click the Add icon. You can add multiple email addresses.

Description: Enter a brief description for the lead.

Enter the following details in the **More Information** section:

Status. Select the status of the lead from the drop-down list. Standard status options are listed below. The administrator can change these to suit your organization's requirements:

- **New:** Unassigned, new lead.
- **Assigned:** Newly assigned to user.
- **In Process:** Currently active.
- **Converted:** The status appears as converted after the **Convert Lead** link has been selected. The system automatically changes the status in this field.

Note: Do not delete the Converted status from the drop-down list.

- **Recycled:** No opportunity at this time, lead should recycle to marketing for future follow-up.
- **Dead:** No opportunity and/or bad data.

Status Description. Enter a brief description for the lead status.

Opportunity Amount. Estimated amount of the sale.

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

Lead Source. Select the origins of the lead such as **Trade Show** or **Direct Mail** from the drop-down list.

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

Referred by. Enter relevant information in this field if someone referred the lead to you.

Do Not Call. Check this box to add the lead's name to the **Do Not Call** list. This is to ensure that the lead is not contacted through the phone during campaigns.

Specify the following information in the **Other** section:

Assigned to. Enter the name of the individual who is assigned to the record, or click **Select** to choose from the User List. By default, this is assigned to you.

3. Click **Save**.

This displays the lead's Detail View. You can create activities, attach notes, and view past marketing activities, including a list of campaigns, if any, that were sent out to the lead in the Lead's Detail View.

Managing Lead Information

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

To manage leads

- Use the Search sub-panel on the Leads Home page to search for a lead. For more information, see [Searching for Information in Sugar](#).
- Follow the steps listed below to add one or more leads to a campaign Target List:
 - a. Select one or more leads in the Leads List View.
 - b. Click **Add To Target List** from the **Actions** drop-down list.
This opens the **Target Lists Search** page.
 - c. Select the Target List from the **Target Lists Search** page.
- For information on how to import and export leads through vCards, see [Using vCards to Import and Export Contacts](#).
- Select the data source from the lead's Detail View to pull in data from external data sources such as LinkedIn. For more information on data sources, see [Integrating data from external sources](#).
- Select **Import** from the **Actions** drop-down list to import records. For more information on importing data, see [Importing Data](#). For information on how to import Leads from vCards, see [Using vCards to Import and Export Contacts](#).
- Select records from the List View, click the **Export** link from the **Actions** drop-down list to to export records. For more information, see [Exporting Data](#).
- Select duplicate records from the List View, click the **Merge Duplicates** link to merge duplicate records. For more information see [To merge duplicate records from the List View](#).
- Click the **View Change Log** link in the Detail View of a Lead record to track changes in the lead information over time.
- Select multiple records in the Leads List View, click the Mass Update link in the **Actions** drop-down list to edit or delete information related to multiple leads. For more information, see [To edit or delete multiple records](#).
- Click on the lead name in the List View to display the Detail View of that lead record. The follow tasks can be performed from the Detail View page:
 - Click **Edit** to modify the record.
 - Click **Manage Subscriptions** to manage newsletter subscriptions.
Select the newsletter from the **Available NewsLetters** list and drag it to the **NewsLetters Subscribed To** list to add the lead to a newsletter subscription mailing list.

Drag the newsletter from the **Newsletters Subscribed to** list to the **Available Newsletters list** to add the individual to a newsletter subscription mailing list. Click **Save** to update the information.

- Click **Duplicate** to duplicate a lead, on the detail page. This is a convenient way of creating a similar lead. You can change the information in the duplicate record to create the new lead.
- Click **Delete** to delete a lead.
- For more information on how to view and edit related information in a sub-panel, see [To manage related information in sub-panels](#).
- Follow the steps listed below to archive a related email:
 - a. Scroll down to the **History** sub-panel where related emails are listed in the Detail View.
 - b. Click **Archive Email**.
This displays the **Create Archived Emails** form.
 - c. Copy-paste information related to the email into the fields in the **Create Archived Emails** form and click **Save**.

Note: You can create Web-to-Lead forms for use in your web-based campaigns and other sources such as your website. This Lead information is saved in the Sugar database and can be used to generate opportunities for your organization. For more information, see [Creating Web-to-Lead Forms](#).

Converting Leads

Sugar enables you to convert leads into Contacts, Opportunities, and Accounts after you have evaluated and qualified them. Based on your lead-conversion options, set by your Sugar administrator, you can do any one of the following with lead-related activities (Tasks, Calls, Meetings, Notes, and Emails) during conversion:

- Create and relate copies of all of the Lead's activities to new records that you have selected. Copies are created for each of the selected records.
- Move all of the Lead's activities to a new record that you have selected.
- Do nothing - The activities remain related to the converted Lead.

To convert a lead

1. Click **Convert Lead** on the Lead's Detail View page.

This displays the **Convert Lead** page.

The **Create Account** checkbox is pre-selected by the system to create a new account for the lead. You can also create other related records such as a note, task, and opportunity if the administrator has enabled you to do so.

2. Click the select arrow next to the Select Account fields to choose an account from the **Accounts** list and associate the lead with an existing account.
3. Select the appropriate checkbox to create a note, appointment, or opportunity.

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

4. Select a module from the **Move Activities to** or **Copy Activities To** drop-down list.

Note that the drop-down list changes based on your selections on the Convert Lead page. For example, if you have selected Create Opportunity, values displayed in the **Move Activities to** or **Copy Activities To** drop-down list are: Contact, Account, Opportunity.

The **Move Activities to** or **Copy Activities To** field is missing if your Sugar administrator has selected **Do Nothing** for Lead-related activities.

5. Populate the mandatory and other fields and click **Save**.

This creates a new contact, associates it with the related records and displays links to the new records. You can also view these records from the contact's Detail View page.

Contacts Module

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

A contact is any individual who is a valid sales lead; a lead that has been evaluated and assessed for a possible sales opportunity. You can associate a contact with any record such as an **Account**, **Opportunity**, or **Campaign**. Associating a contact with a campaign enables you to track the effectiveness of the campaign in generating opportunities for your organization.

The **Actions** bar on the **Contacts** tab displays the following options:

Create Contact. Click this option to create a record for a new contact.

Create Contact From vCard. Click this option to import a vCard file from your local system.

View Contacts. Click this option to view a list of your existing contacts.

Import Contacts. Click this option to import contact information from an external application or file. For more information, see [Importing Data](#).

Creating Contacts

You can create contacts in Sugar and you can also import them into Sugar using a comma-delimited, tab-delimited, or custom delimited file.

To create a contact

1. Select **Create Contact** from the **Actions** bar on the **Contacts** tab.
Or, click the Create icon on any page within the **Contacts** module.
2. Enter the following information in the **Contacts Overview** section:

First Name. Enter the contact's first name.

Last Name. Enter the contact's last name.

Title. Enter the contact's business title.

Office Phone. Enter the contact's office phone number.

Mobile. Enter the contact's mobile phone number.

Fax. Enter the contact's fax number.

Account Name. Enter the account name associated with the contact; or click **Select** to choose from the list of existing accounts.

Address: Enter the Primary Address and Other Address information. Select **Copy address from left** box to copy the Primary Address into the Other Address section.

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

Email Address: Enter the email address for the organization and your contacts and campaign targets within the organization. Select **Invalid** to indicate an incorrect email address. If you sent out campaign emails this contact and the individual chose to opt-out of receiving them, select **Opted Out**.

To add an additional email address, click the Add icon. You can add multiple email addresses.

Description: Enter a brief description for the contact.

Enter the following details in the **More Information** section:

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

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

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

Sync to Outlook. Select this box to synchronize this contact information with Outlook if you have installed the Sugar Plug-in for Microsoft Outlook.

Do Not Call. Select this box to add the contact to the Do Not Call list. This is to ensure that the contact is not targeted during campaigns.

Specify the following information in the **Other** section:

Assigned to. Select the individual who is responsible for communicating with this contact. You are assigned to the contact by default.

3. Click **Save** to save the record and view its detail page.

Click **Cancel** to return to the Contact's home page without creating the new contact.

Managing Contacts

Managing contacts includes tasks such as editing, importing and exporting contact records.

To manage contacts

- To edit or delete information related to multiple contacts, select multiple records in the Contacts List View and click the Mass Update link in the **Actions** drop-down list. For more information, see [Editing and Deleting Multiple Records](#).

- To add one or more contacts to a campaign target list, select them in the Contacts List View and click **Add to Target List** to select the list from the **Target Lists** pop-up window.
- To display the Detail View for a contact, click on the contact name in the List View.
- To edit contact information, click **Edit** in the Contact's Detail View.
- To archive a related email, scroll down to the **History** sub-panel in the Detail View where related emails are listed and click **Archive Email**. This displays the **Create Archived Email** form. Copy-paste information related to the email into this form to save it for your records.
- To pull in account data from data sources such as LinkedIn, select the data source from the contact's Detail View. For more information on data sources, see [Integrating data from external sources](#).
- To import records, select **Import** from the **Actions** bar list of the Contacts tab. For more information on importing data, see [Importing Data](#).
- To export records, select the records from the Contacts List View, click **Export** from the **Actions** bar list and follow the process described in [Exporting Data](#).
- To merge duplicates, select the records from the Contacts List View, click **Merge** from the **Actions** bar list, and follow the process described in [Merging Duplicate Records](#).
- To manage newsletter subscriptions, click **Manage Subscriptions** on the Contact Detail View. To add the individual to a newsletter subscription mailing list, select the newsletter from the **Available/NewsLetters Unsubscribed to** list and drag it to the **NewsLetters Subscribed To** list. To remove the individual from the mailing list of a newsletter, drag the newsletter from the **Newsletters Subscribed to** list to the **Available/NewsLetters Unsubscribed to** list. Click **Save** to update the information.
- To duplicate contact information, click **Duplicate** in the Contact Detail View.

Duplication is a convenient way of creating a similar contact. You can change the information in the duplicate record to create a new contact.
- To track changes made to contact information over time, click the **View Change Log** link located in the Detail View.
- To manage records in a sub-panel, see [To manage related information in sub-panels](#).

Using vCards to Import and Export Contacts

vCards are electronic business cards that are exchanged through applications such as email and web browsers. You can view and create a vCard file from the record's Detail View. You can save it to your local machine to import it to other applications.

When you create contacts in Sugar, or import them from another application, the system automatically creates a vCard for it. You can also create a vCard file from the record's Detail View and save it in Outlook, or on your local machine.

To import a vCard

1. Select **Create from vCard** from the **Actions** bar of the Contacts module tab.
This displays the Import vCard page.
2. Click **Browse** to navigate to the vCard location on the local file system.
3. Select the file from your local machine and click **Import vCard**.
This displays the Detail View page of the created contact.
4. Click the **vCard** icon located to the right of the contact Name in the contact's Detail View to open the vCard and edit the information.

To edit or to save a vCard to a different location

1. Click the **vCard** icon located next to the contact's name in the contact's Detail View.
This displays a dialog box prompting you to open or save the file.
2. To edit the vCard and save it in your Contacts folder in Outlook, open the file, make the necessary changes and click Save; to save the vCard on your local machine, select **Save As**.

Accounts Module

Use the Accounts module to create and manage customer accounts for your organization.

An account contains your customer information such as name and address. Each account can be associated with other records such as opportunities and contacts.

The **Actions** bar on the **Accounts** tab displays the following options:

Create Account. Click this option to create a new account.

Accounts. Click this option to view a list of existing accounts.

Import. Click this option to import account information from external systems and data sources. For more information, see [Importing Data](#).

Creating Accounts

You can create accounts in Sugar, or you can import them into Sugar using a comma-delimited, tab-delimited, or custom delimited file.

To create an account

1. Select **Create Contact** from the **Actions** bar on the **Contacts** tab.
Or, click the **Create Contact** icon in the Shortcuts Bar, and add additional information after you save the form.
Or, click the Create icon on any page within the **Contacts** module.
2. Enter the following information In the **Account Overview** section:
 - Account Name.** Enter a name for the account.
 - Website.** Enter the URL for the organization's website.
 - Office Phone.** Enter the office phone number.
 - Fax.** Enter the fax number for the organization.
 - Address.** Enter the billing and shipping addresses. To copy the Billing Address to the Shipping Address section, select the **Copy address from left** checkbox.
 - Email Address:** Enter the primary email address for the account. To add additional email addresses for your contacts and campaign targets within the organization, click the **Add** icon. To indicate the primary email address, select **Primary**. If you sent campaign emails to this contact and the individual chose to opt-out of receiving them, select **Opted Out**. If the email is incorrect, select **Invalid**.

Description: Enter a brief description for the lead.

Enter the following information in the **More Information** section:

Type. Enter the account category such as Customer or Partner.

Annual Revenue. Enter the annual revenue for the organization.

SIC Code. Enter the Standard Industrial Classification code that indicates your organization's type of business.

Member of. Enter the names of organizations associated with the account.

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

Industry. From this drop-down list, select the industrial sector to which the account belongs.

Employees. Enter the number of employees in the organization.

Ticker Symbol. Enter the stock ticker symbol for the organization.

Ownership. Specify the owner information.

Rating. Enter the organization's rating in the industry.

Specify the following information in the **Other** section:


Assigned to. Enter the name of the individual you want to assign to the account or click **Select** to choose from the User List. By default, this record is assigned to you.

3. Click **Save** to save the new account information; click **Cancel** to exit the page without saving the information.

Managing Accounts

Managing accounts includes tasks such as adding, editing, and deleting accounts.

To view and manage accounts

- To sort the Accounts List View, click any column title which has the  icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple accounts, select multiple records in the Accounts List View and click the **Mass Update** link in the **Actions** drop-down list. For more information, see [To edit or delete multiple records](#).
- To import records, select **Import Accounts** from the **Actions** bar on the Accounts tab. For more information on importing data, see [Importing Data](#).
- To export records, select the records from the **Accounts** List View, click the **Export** link in the **Actions** drop-down list and follow the process described in [Exporting Data](#).
- To add one or more accounts to a campaign target list, select them in the List View, click **Add to Target List** in the **Actions** drop-down list, and select the list from the **Target Lists** pop-up box.
- To view account information, click the record's name in the List View. This displays sub-panels for related records such as Activities, History, Contacts,

Opportunities, and Leads on the Detail View. You can create new records or edit existing ones.

- To edit an account, click **Edit** on the Detail View page, make the necessary changes, and click **Save**.
- To pull in data from data sources such as LinkedIn, select the data source from the account's Detail View. For more information on data services, see [Integrating data from external sources](#).
- To merge duplicates, select the records from the **Accounts** List View, click the **Merge** link in the **Actions** drop-down list, and follow the process described in [Merging Duplicate Records](#).
- To archive a related email, scroll down to the **History** sub-panel in the Detail View where related emails are listed and click **Archive Email**. This displays the **Create Archived Email** form. Copy-paste information related to the email into this form to save it for your records.
- To copy the account's billing or shipping address to the associated contact records, in the Edit View, click the **Copy** button, select one or more contacts and click **Copy Address to Checked Contacts**.
- To duplicate an account, click **Duplicate** on the Detail View page and click **Save**. This duplicates the account and displays its Detail View page. Duplication is a convenient way of creating a similar account. You can change the information in the duplicate record to create a new account.
- To delete the account, click **Delete** on the Detail View page.
- To track changes in the account record, click **View Change Log** on the account's Detail View page.
- To view or manage related records in a sub-panel, see [To manage related information in sub-panels](#).

Opportunities Module

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

An opportunity specifies the estimated amount of a sales deal and is tied to a sales stage. A sales stage, such as Qualification, Closed Won, or Closed Lost identifies how close you are to making the sale. The administrator defines and sets the sales stage depending upon the requirements in your organization. The estimated amount can vary depending on the sales stage.

Based on the sales stage, the system calculates the probability of a sale. For example, at the Proposal sales stage, the system calculates the probability as 65%, and at the Negotiation sales stage, probability increases to 80%.

The following are the default sales stages in Sugar:

Prospecting. This is the first stage in the sales process and indicates that the opportunity with this prospect is new and needs to be qualified by a sales representative.

Qualification. The sales representative is currently interacting with the prospect to determine if a sales opportunity exists.

Needs Analysis. The sales representative uncovers the prospect's business problems (having determined that the prospect is interested in the products or services).

Value Proposition. The sales representative maps the company's products and/or services to the prospect's business problems and describes the value of the solution (having uncovered the prospect's business problems).

Id. Decision Makers. The sales representative identifies the decision makers necessary to close this opportunity (having determined that there is a match between the prospect's business problems and the company's products and/or services).

Perception Analysis. The sales representative analyzes the prospect's perceived value of the company's solution to prepare the appropriate combination of products and services for a sales quote.

Proposal/Price Quote. The sales representative delivers the proposal or price quote to the prospect.

Negotiation/Review. The sales representative reviews and negotiates the proposal with the prospect.

Closed Won. The sales representative has won this opportunity and the company can now bill the customer.

Closed Lost. The sales representative has lost this opportunity.

Every opportunity must be associated with an account. You can associate an opportunity with only one account but you can associate it with multiple leads and contacts.

You can associate an opportunity with a campaign to track the campaign's effectiveness in generating opportunities for your organization. Any campaign-related opportunity that generates revenue is reflected in the campaign's ROI (Return on Investment) chart. For more information, see [Viewing a Campaign's Return on Investment](#).

Note: You can associate an opportunity with only one campaign.

Creating Opportunities

You can create opportunities in Sugar, or you can import them into Sugar using a comma-delimited, tab-delimited, or custom delimited file. You can create an opportunity not only from the **Opportunities** module, but also from the Convert Lead page, and from the Detail View of Accounts, Contacts, or Quotes.

To create an opportunity

1. Click **Create Opportunity** from the **Actions** bar on the **Opportunities** tab.

Or, click the Create icon on any page within the **Opportunity** module.

2. Enter the following information in the **Create (Opportunity)** page:

Opportunity Name. Enter a name for the opportunity.

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

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

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

Opportunity Amount. Enter the estimated amount of the sale.

Type. Use this drop-down list to specify whether the opportunity is from an existing customer or a potential customer.

Sales Stage. Specify the current status of this opportunity from the drop-down list. The value specified for the **Sales Stage** determines the default value displayed in the **Probability** field on the **Opportunity** page.

Lead Source. Use this drop-down list to specify the lead source such as Trade Show or Cold Call.

Probability (%). Sugar determines the values for this field based on the selected **Sales Stage** value. For example, if the **Sales Stage** value is Closed/Won, then the probability changes to 100%. You can manually change the Probability% value.

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

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

Description. Enter a brief description of the opportunity.

Specify the following information in the **Other** section:


Assigned to. Enter the name of the individual you want to assign to the record or click **Select** to choose from the User List. By default, this record is assigned to you.

3. Click **Save** to create the new opportunity; click **Cancel** to return to the Opportunity home page without saving the information.

Managing Opportunities

Managing opportunities includes tasks such as editing, deleting, importing, and exporting records.

To manage opportunities

- To sort a list view, click any column title which has the  icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple opportunities, select multiple records in the Opportunities List View and click the **Mass Update** link in the **Actions** drop-down list. For more information, see [To edit or delete multiple records](#).
- To import records, select **Import Opportunities** from the **Actions** bar on the **Opportunities** tab. For more information on importing data, see [Importing Data](#).
- To export records, select the records from the Opportunities List View, click **Export** in the **Actions** drop-down list and follow the process described in [Exporting Data](#).
- To merge duplicates, select the records from the Opportunities List View, click **Merge** in the **Actions** drop-down list and following the process described in [To merge duplicate records from the List View](#).
- To view the details of an opportunity, click the opportunity name in the List View.
- To edit the details, on the detail page, click **Edit**.
- To duplicate an opportunity, click **Duplicate** on the Detail View page. Duplication is a convenient way of creating a similar opportunity. You can change the information in the duplicate record to create a new opportunity.
- To delete an opportunity, click **Delete** on the Detail View page.
- To track changes to an opportunity over time, click the **View Change Log** tab on the Detail View of the page.
- To view and manage related records in a sub-panel, see [To manage related information in sub-panels](#).
- To archive a related email, scroll down to the **History** sub-panel in the Detail View and click **Archive Email**. This displays the **Create Archived Emails** page. Copy-paste information related to the email into the **Create Archived Emails** page and save it for your records.

Calendar Module

The Calendar Module has been introduced as a separate module in Release 6.2.0 for ease of use and access. Use the Calendar module to schedule and manage activities such as calls, meetings, and tasks.

The **Actions** bar on the **Calendar** tab displays the following options:

Schedule Call. Click this option to schedule a call as described in [Scheduling Calls](#).

Schedule Meeting. Click this option to schedule a meeting as described in [Scheduling Meetings](#).

Create Task. Click this option to create a task as described in [Creating Tasks](#).

Today. Click this option to view the current day on your Calendar.

Using the Calendar

To view your calendar by day, week, month or year, click the corresponding button located at the top left of the main screen.

You can click on any time slot in Calendar to create Meeting and Call records using Quick Create forms. Alternatively, you can select the Schedule Call or Schedule Meeting from the Calendar menu option to create the activity records.

Meetings, Tasks and Calls are displayed in individual color codes. Meetings are displayed in blue, Calls in red, and Tasks in green to distinguish and identify them easily in Calendar.

You can click on any Meeting or Call record in Calendar and view and update the information in Quick Edit forms.

You can navigate to any date using the Calendar icon. The Calendar icon is located next to the Settings button on the upper right corner of the Calendar modules page. Click on the Calendar icon and select any date within the same month or use the left or right arrows to navigate to previous or upcoming months.

Alternatively, you can use the Previous and Next arrows to navigate to the previous and next day/week/month/year, depending on your Calendar View settings.

You can drag and drop items in Calendar to move them from one time slot to another.

You need to navigate to the record's Detail View page to create a related note or attachment for any Meeting, Call, or Task. Go to the module (for example Meeting, Call, or Task), select the record from the module's List View page and use the Create Note or Attachment button.

You can change the first day of the week displayed in Calendar by adjusting settings in your User section. For more information, see [First Day of the Week. Specify the first day of the week that displays in Week, Month, and Year Views.](#)

Calendar has been added as one of the Sugar Dashlets in the Add Sugar Dashlets>Modules tab in 6.4.0.

Viewing Shared Calendars

Users can view each other's calendar in order to schedule appointments. Managers have permissions to view, edit, and delete their subordinates' appointments. Subordinates can only view their Manager's appointments as free/busy time. Administrators have full access to any user's calendar and the permissions to edit, duplicate, and delete any appointment.

To view shared calendars

1. Click **Shared** on the Calendar home page.
The page displays the **Shared Calendar** page.
2. To view a user's calendar, click the **Edit** icon.
This displays a drop-down list of users.
3. Choose a user and click **Select**.
This displays the selected user's calendar.

Calls Module

The Calls Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the Calls module to log, view, and import calls.

The **Actions** bar on the Calls tab displays the following options:

Log Call. Click this option to record the details of a call as described in [Scheduling Calls](#).

View Calls. Click this option to view and manage calls as described in [To manage calls](#).

Import Calls. Click this option to import external data into a note as described in [Importing Data](#).

Scheduling Calls

You can schedule calls with Users, Contacts, and Leads. Scheduling a call in Sugar enables you to create a record of the call along with information regarding the subject of discussion, the participants, the time period, and the status. After you save this information, you can send an invitation to all the participants immediately or at a later date. You can create a note or add attachments before or after a call occurs. After you complete a call, or if you cancel it for any reason, you can update its status.

When you create the call, the **Create Calls** page displays the following sub-panels:

Scheduling. The Scheduling sub-panel displays details such as the name of the attendees, the day, and the time of the call. If other calls are already scheduled, the busy time is blocked out and colored blue. If there are scheduling conflicts, the busy time displays as a brown block.

Add Invitees. You can use the Add Invitees sub-panel to find users that you want to invite as described in [To add invitees](#).

To schedule a call

1. Select **Log Call** from the **Actions** bar of the **Calls** tab.
2. Enter information in the following fields:

Subject. Enter the subject of discussion.

Start Date & Time. Click the **Calendar** icon and select the date or input the data manually. Select the time, in hours and minutes, from the adjoining drop-down lists.

Status. Select one of the following from the drop-down lists:

Inbound. Choose this option if it is an inbound call.

Outbound. Choose this option if it is an outbound call.

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

Held. Change the status from **Planned** to **Held** after a call is completed.

Not Held. Change the status from **Planned** to **Not Held** if a call did not occur for any reason.

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

When you type a character in the field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results. When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies “s f l” (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter “A”, the system displays first names starting with “A”. Similarly, if the Name display format specifies “s l f”, then the system displays last names starting with “A”.

Duration. Enter the number of hours in the adjoining box and select the number of minutes from the drop-down list.

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

If you set a default time for reminders on your User Preferences page, Sugar will implement it when you do not set a reminder during call creation. This default time displays in the Calls Detail View page and can be modified in the Edit View page.

Description. Enter a brief description of the purpose of the call.

Assigned to. Specify the user who is assigned to the record. By default, it is assigned to you. To assign a different user, click **Select** to select from the Users list.

Description. Enter a brief description of the purpose of the call.

Add Invitees. Enter names of the participants of the call as described in [To add invitees](#).

3. Click **Save**.
4. Click **Send Invites** to send an invitation to the participants.
5. To create a copy of the call, click **Close and Create New**.

This closes the original call and changes its status to **Held**. The new call retains all the information of the original record except for the status, which by default is set to **Planned**.

To add invitees

1. In the **Add Invitees** sub-panel of the Call Detail View page, enter all or any of the following information for a user, contact, or lead:

First Name. You can add a letter, a whole name, or a partial name.

Last Name. You can add a letter, a whole name, or a partial name

Email. You can add a letter, a whole address, or a partial address.


2. Click **Search**.

The system displays the search results below with an **Add** button next to each name on the list.

3. Click the appropriate **Add** button to send an invitation to the user.

The list of invitees displays in the Scheduling sub-panel.

To manage calls

- To sort a List View, click any column title which has the  icon beside it; to reverse the sort order, click the column title again.
- To update information for some or all calls, use the **Mass Update** panel in the Actions drop-down list of the Calls List View as described in [Editing and Deleting Multiple Records](#).
- To import a list of calls, select **Import Calls** from the **Actions** bar of the **Calls** tab. For more information on importing data, see [Importing Data](#).
- To view the details of a call, click its Subject on the Calls List View.
- To edit a call, click **Edit** on the call's Detail View page, revise the information and click **Save**. Associated information such as **Contacts**, **Users**, **Leads**, and **Notes** are displayed in sub-panels.
- To duplicate a call, click **Duplicate** in the call's Detail View page. Duplication is a convenient way of creating a similar activity. You can change the information in the duplicate record to create a new activity.
- To delete a call, click **Delete** on the call's Detail View page, and then click **OK**.
- To find a specific call in the list, enter the subject or the contact name in the **Search** sub-panel above and click **Search**. To search only your records, select the **My items** checkbox.
- To perform an advanced search with additional search filters such as related record, click **Advanced**.
- To edit a related record, click the **Edit** icon for the related record in the sub-panel of the Detail View, make the changes, and click **Save**.
- To remove an association with another record, scroll down to the related record in the call's Detail View, click the **rem** icon, and then click **OK**.

Meetings Module

The **Meetings** Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use this module to schedule, view, and manage meetings.

The **Actions** bar on the **Meetings** tab displays the following options:

Schedule Meeting. Click this option to schedule a meeting as described in [Scheduling Meetings](#).

View Meetings. Click this option to view and manage meetings as described in [To manage meetings](#).

Import Meetings. Click this option to import external data as described in [Importing Data](#).

Scheduling Meetings

You can schedule meetings with users, contacts, and leads. When you schedule a call or a meeting, you are creating a record with information regarding the subject of discussion, the participants, the time period, and the status. After you save this information, you can send out an invitation to all the participants immediately or at a later date. You can create a note or add attachments before or after a meeting occurs. After you complete meeting, or if you cancel it for any reason, you can update its status.

The **Create (Meetings)** page displays the following sub-panels:

Scheduling. The **Scheduling** sub-panel displays details such as the name of the attendees, the day, and the time of the meeting. If other meetings are already scheduled, the busy time is blocked out and colored blue. If there are scheduling conflicts, the busy time displays as a brown block.

Add Invitees. Use the **Add Invitees** sub-panel to find users that you want to invite as described in [To add invitees](#).

To schedule a meeting

1. Select **Schedule Meeting** from the **Actions** bar of the **Meetings** tab.
2. Enter information in the following fields:

Subject. Enter the subject of discussion.

Status. Select one of the following from the drop-down lists:

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

Held. Change the status from **Planned** to **Held** after the meeting is completed.

Not Held. Change the status from **Planned** to **Not Held** if the meeting did not occur for any reason.

Start Date. Click the **Calendar** icon and select the date or input the data manually. Select the time, in hours and minutes, from the adjoining drop-down lists.

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

When you type a character in the field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results. When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies “s f l” (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter “A”, the system displays first names starting with “A”. Similarly, if the Name display format specifies “s l f”, then the system displays last names starting with “A”.

If you set a default time for reminders on your User Preferences page, Sugar will implement it in the event that you do not set a reminder when you create a call or meeting. The default time will display in the Detail View after you save the record. You can change it in the Edit View.

Duration. Enter the number of hours in the adjoining box and select the number of minutes from the drop-down list.

Location. Enter the meeting location.

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

If you set a default time for reminders on your User Preferences page, Sugar will implement it when you do not set a reminder during meeting creation. This default time displays in the Meeting Detail View page and can be modified in the Edit View page.

Description. Enter a brief description for the purpose of the meeting.

Assigned to. Specify the user who is assigned to the record. By default, it is assigned to you. To assign a different user, click **Select** to select from the Users list.

Add Invitees. Enter names of the participants of the meeting as described in [To add invitees](#).

3. Click **Save**.
4. Click **Send Invites** to send out an invitation to the participants.
5. To create a copy of the call or meeting, click **Close and Create New**.

The system closes the original meeting and changes its status to **Held**. The new meeting retains all the information of the original record except for the status, which by default is set to **Planned**.

To add invitees

1. Enter all or any of the following information for a user, contact, or lead in the **Add Invitees** sub-panel of the **Create** (Meeting) page:

First Name. You can add a letter, a whole name, or a partial name.

Last Name. You can add a letter, a whole name, or a partial name

Email. You can add a letter, a whole address, or a partial address.


2. Click **Search**.

The system displays the search results below with an **Add** button next to each name on the list.

3. Click the appropriate **Add** button to send an invitation to the user.

The list of invitees displays in the **Scheduling** sub-panel.

To manage meetings

- To sort a List View, click any column title which has the  icon beside it; to reverse the sort order, click the column title again.
- To update information for some or all meetings, use the **Mass Update** panel in the **Actions** drop-down list of the Meetings List View as described in [Editing and Deleting Multiple Records](#).
- To import a list of meetings, select **Import Meetings** from the **Actions** bar of the **Meetings** tab. For more information on importing data, see [Importing Data](#).
- To view the details of a meeting, click its Subject on the Meetings List View.
- To edit a meeting, click **Edit** on the meeting's Detail View page, revise the information and click **Save**. Associated information such as **Contacts**, **Users**, **Leads**, and **Notes** are displayed in sub-panels.
- To duplicate a meeting, click **Duplicate** in the meeting's Detail View page. Duplication is a convenient way of creating a similar activity. You can change the information in the duplicate record to create a new activity.
- To delete a meeting, click **Delete** on the meeting's Detail View page, and then click **OK**.
- To find a specific meeting in the list, enter the subject or the contact name in the **Search** sub-panel above and click **Search**. To search only your records, select the **My items** checkbox.
- To perform an advanced search with additional search filters such as related record, click **Advanced**.
- To edit a related record, click the **Edit** icon for the related record in the sub-panel of the Detail View, make the changes, and click **Save**.
- To remove an association with another record, scroll down to the related record in the meeting's Detail View, click the **rem** icon, and then click **OK**.

Emails Module

The Emails module enables you to manage your emails. You can use the Emails module for the following tasks:

- Compose and send emails
- View and process emails on external mail servers without downloading them into the Sugar database
- Import emails into the Sugar database for necessary action
- Associate an imported email with a related Sugar record such as a bug or an account to create a communication thread for future reference
- Create a related record, such as a bug, from an email
- Search for imported emails based on specific parameters

Options to check for incoming emails, compose emails, and configure mail settings display at the top of the Emails home page. The page is divided into panels: the left panel contains the Folders list and the Search field; the top half of the right panel lists emails, and the bottom half of the right panel displays the contents of the email that you select from the list above.

Configuring Email Settings

Settings in Emails enable you to manage how you view and compose emails. Some settings are pre-configured with default values. Other settings are optional. You can customize these settings to suit your requirements.

Sugar supports the IMAP protocol for viewing emails in your external mail accounts and for sending emails composed in Sugar. Using IMAP enables you to access IMAP folders selectively on the mail server in Sugar.

The Settings window displays tabs for General settings and for Mail Account settings.

General Settings

The General Settings tab (within the Settings tab) displays options to specify the character set, signature, automatic/manual checks for incoming emails and so on. Some of these settings have default values which you can modify. General Settings apply to all your personal mail accounts in Sugar.

To specify general settings

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

This opens the **Settings** pop-up box.

2. Enter values for any of the following fields in the Settings pop-up box:

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

Send Plain Text Emails Only. Check this box to send emails in plain text format instead of the default HTML format.

Character Set: Specify the default character set for outbound emails from this drop-down list.

Signatures. Select an existing signature for your outbound emails from this drop-down lists. To create a signature, click **Create** located next to the Signature field, enter a name for the signature, input text for the signature and click **Save**. To use a signature image file located on a hosted website, click the Insert Image icon on the HTML toolbar, and enter the URL.

Signature above reply. Select this box to place your signature above the content of the email to which you are responding.

Emails per Page. Specify the number of emails that you want displayed per page in the pane containing the email list. The email list is paginated to enable you to view the specified number of emails within each page.

Folder Management. This section displays sub-folders in the **My Emails** folder, along with the default folders **My Drafts** and **Sent Emails**. Highlight the folders that you want displayed in the Folders tab.

3. Click **Done** to save your preferences.

Mail Accounts

You can create one or more personal mail accounts in Sugar to view emails from your external mail accounts in Sugar. You can import these emails into Sugar if needed.

Group mail accounts are used to view and distribute emails addressed to the organization rather than an individual user. Only administrators can set up group mail accounts. Administrators and users can view and distribute these emails for necessary action. As a user, you can subscribe to group mail account.

For outbound emails, the administrator can setup a default SMTP server that you can use to send mails. You can also specify a different SMTP server. The administrator can specify the email address, user name, and password for all users. You can change this information to suit your requirements. Your User page displays your default settings.

To create a mail account

1. Click **Settings** at the top of the page.
This displays the **Settings** window.
2. Click the **Mail Accounts** tab in the **Settings** window.
3. Click **Add** in the **Mail Accounts** section.
This displays the **Mail Account Properties** page.
4. Enter information for the following fields in the **Incoming Email** section:

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

User Name. Enter the username of your external mail account.

Password. Enter the password of your external mail account.

Mail Server Address. To access a Gmail account, click **Prefill Gmail Defaults** to autofill the mail server address, port number, and protocol. For other accounts, such as Yahoo, enter the address of the external email server from which emails will be viewed in Sugar.

Mail Server Protocol. Select **IMAP** from this drop-down list.

This displays the following fields:

Monitored Folders. By default, the system monitors the Inbox. To monitor other folders, click **Select** and view a list of available folders in the external mail account. To select multiple folders, press SHIFT or CONTROL on your keyboard.

Trash Folder. To select a Trash folder from the Folders list, click **Select**.

Sent Folder. To add a folder to view your outbound emails, click **Select**.

Use SSL. If your mail server supports secure socket connections, selecting this box will force SSL connections when importing emails into Sugar. This box is automatically selected when you click the **Prefill Gmail™ Defaults** link.

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

5. Click **Test Settings** to ensure that the specified information is correct. An error message is displayed if errors are detected.
6. Enter the following information in the **Outgoing Email** section:

From Name. This field is automatically populated with your first and last names.

From Address. Enter the email address you want to display in the **From** field of emails that you send.

Reply to Address. Enter information in this field if you want responses to your emails to be directed to an email address other than the one specified in your incoming email account.

Outgoing SMTP Mail Server. Select an existing SMTP server from the drop-down list or select **Add** to specify a new SMTP server. For more information, see [To add a mail server for outbound emails](#).
7. Click **Done** to create the mail account.

This displays the mail account in the **Mail Accounts** table in the **Settings** window. The outbound mail server that you specified displays below in the **Outgoing SMTP Mail Servers** section.

All mail accounts that you create are listed in the **Mail Accounts** tab of the **Settings** page, and are marked active by default. Group mail accounts that you are allowed to access also appear in this list. When you deactivate a mail account, the account is not listed on the Folders tab and emails from that account will not display in the Sugar inbox.

8. To specify a default mail account, select the **Default** button corresponding to the mail account name. The **From** name and email address associated with the default mail account are used when you compose emails in Sugar.
9. To create another mail account, click **Add** in the Mail Accounts panel in the Settings window and repeat the process described above. If not, click **Done** to close the **Settings** page.

To edit or delete a mail account or an outgoing mail server, click the Edit icon or the Delete icon respectively. You cannot delete Group mail accounts.

To add a mail server for outbound emails

1. Click the **Add** button located below the **Outgoing Mail Server** list.
This displays the **Outbound Mail Server Properties** page. You can select Gmail, Yahoo!, Exchange, or Other.
2. Add the applicable server:
 - To add the Gmail server or the Yahoo! server, click the appropriate button, and enter the email address and password in the fields below
 - To add an Exchange server or a different server, click Exchange or Other respectively, and enter the server name
3. If the mail server requires authentication to send out emails, select the **Use SMTP Authentication?** box, and enter the user name and password in the fields below.
4. To check if the outgoing email settings are correct, click **Send Test Email**.
If the settings are incorrect, Sugar displays an error message.
5. Click **Done** to add the mail server.
The mail server displays in the **Outgoing Mail Server** drop-down list on the Mail Accounts tab.

To manage mail accounts

- To view incoming emails in your inbox, click **Check Mail** while viewing the inbox or right-click the mail account and select **Check Mail**.
- To mark the email as read, unread, flagged, or unflagged, select the email, right-click, and select **Mark** and then select the appropriate option.
- To refresh the mail account view, right-click the account, and select **Synchronize**.
- To delete the mail account, right-click the account, and select **Delete Folder**.
- To rename the mail account, right-click the account and select **Rename Folder**. Enter a new name in the Mail Account Name field and click **OK**.
- To empty the Trash folder, right-click the account and select **Empty Trash**.
- To clear the email cache directory in Sugar, click **Clear Cache Files**.

Email Folders

A folder can be an inbox or a local folder. The system displays inboxes and users can create local folders. Sugar automatically creates a folder for every mail account that

you configure. Emails in these folders reside on the mail server of the associated mail account. All emails in your local folders reside in the Sugar database.

Sugar provides a local folder named *My Email* containing emails that are imported into Sugar and those that are assigned to you and your direct reports reside. The two sub-folders, *My Drafts* and *My Sent Emails*, contain your email drafts and emails that you sent out, respectively. To group and store imported emails, you can create additional local folders.

Sugar lists folders in the General tab of the Settings window. In order to view a folder in the Folders tab of the Emails home page, you must select it in the General tab.

To create a folder

1. To create a local folder in Sugar, right-click **My Email** and select **Create Folder** in the **Folders** tab.

The **Add New Folder** dialog box displays on the page.

2. Enter a name for the folder and click **OK**.

The new local folder is now listed under **Folders** in the left-hand panel. This folder is not associated with any of your mail accounts. You can import emails into this folder from any of your mail accounts.

3. To create a new folder for an external mail account, select the account's inbox in the **Folders** tab, right-click, and select **Create Folder**; click **OK**.
4. To create a sub-folder, select an existing folder in the account, right-click, select **Create Folder**, and click **OK**. Alternatively, drag the folder and drop it into the other folder in the account.

To manage accounts and folders

1. To check for new mail in your external mail account, right-click the account in Sugar, and select **Check Mail**.
2. To synchronize the contents of your external mail accounts with the view in Sugar, select the account, right-click, and select **Synchronize**.
3. To delete a folder, select it, right-click, and choose **Delete Folder**. Click **OK** to confirm the action.
4. To rename a folder, select it, right-click, and choose **Rename Folder**. Enter the new name in the Rename Folder window and click **OK** to confirm the action.
5. To remove deleted emails from the account's trash bin, right-click the account or one of the folders, and select **Empty Trash**.

Composing and Managing Emails

When you compose an email, if you have configured multiple mail accounts, you can choose the account from which to send the email. By default, the system uses the signature and character set specified on the General tab of the Settings window, and assigns the email to your default teams as specified in your **User Preferences**. When composing an email, you can also specify an email template and change the signature.

You can associate an email with another record when you compose the email, or after you send it out.

To compose an email without leaving a record's List View or Detail View, use the **Quick Compose** form. To access this form, click the record's email address in a module's List View, the record's Detail View, or the **Compose Email** button in the **Activities** sub-panel of the record's Detail View.

To compose an Email

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

Alternatively, you can click the email address from a module's List View or a record's Detail View, or click the **Compose Email** button in the **Activities** sub-panel of a record's Detail View. This will display the Quick Compose email form.

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

From. To route the email through a specific mail account, click the down arrow to select an existing one from the drop-down list. The list contains all the outbound mail account servers set up by you or the System Administrator.

To. Click this button to select recipients from the address book, or manually enter the names of the recipients in this field. For more information on the address book, see [Using the Address Book](#).

To send a copy of the email to other individuals, click **Add CC** and enter their email addresses in the **CC** field, or click the **CC** button to add recipients from the address book. To send a blind copy of the email to other individuals, click **Add BCC** and enter their names in the **BCC** field, or click the **BCC** button to select recipients from the address book.

Subject. Enter the subject of the email.

Enter the email text in the body field. To apply standard formatting options such as font face, size, bold, italics, indentation and color, highlight the text and click the appropriate buttons on the toolbar. You can select the desired style, format, and font from the appropriate drop-down list.

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

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

The Attach options display in the right panel. To select a file from your local machine, click **Add File** and click **Browse** to navigate to the file location; To attach a file located in the Sugar repository, click **Add Documents** and click **Select** to choose the document from the Document List. To remove the document, click **Remove**.

4. To populate the email with the contents of an email template, click **Options** and select from the **Templates** drop-down list in the **Options** panel. For more information, see [Creating Email Templates](#).
5. To change the signature from the default, in the **Options** panel, select the signature from the **Signatures** drop-down list.

6. To associate the email with a related record, select the module from the **Relate to** drop-down list located at the top of the page, and then click **Select** to specify the record from the module's List View.

When you type a character in a field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results.

When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting with "A". Similarly, if the Name display format specifies "s l f", then the system displays last names starting with "A".

7. To send the email, click **Send**; to save the email as a draft, click **Save Draft**. The saved drafts appear in the **My Drafts** folder.

After you send the email, to view its related records, select it in the **Sent Emails** folder, right-click, and click **View Relationships**. Sugar displays the email's record page, which lists related records such as accounts, contacts, attachments and so on. You can view existing relationships and create new ones from this page.

To view and manage emails in the Sugar inbox

- To check for new emails in a personal email account, select the account and click **Check Mail**.
- To view an email in the panel below, select it in the List View and click it once. To view an email in a separate tab, double-click it in the List View.
- Right-click an email in the inbox to perform any of the following actions:
 - To import the email, open the email and click **Import to Sugar**. Alternatively, select the email in the List View, right-click, and select **Import to Sugar**. For more information, see [To import emails to Sugar](#).
 - To respond to the email, select **Reply**.
 - To respond to all recipients of the email, select **Reply All**.
 - To forward it to another individual, select **Forward** and enter the email address of the recipient.
 - To delete an email when you view it, click **Delete**; to delete multiple emails, select them from the email list and click **Delete**.
 - To print the email, click **Print**.
 - To mark an email as unread, read, flagged, or unflagged, select **Mark**, and choose the option of your choice.
- To view multiple emails, select two or more emails from the list, right-click, and select **Open Multiple Messages**.
- To create a record from the email, open the email and select the record type from the **Quick Create** drop-down list. For more information, see [To create a record from an imported email](#).

- To view the email header information or the raw email text for debugging purposes, click **View** and select **Display Headers** and **Display Raw Email** respectively from the drop-down menu.
- To update information such as email assignments and status change for multiple emails, select them from the Emails list and use the **Mass Update** panel as described in [Editing and Deleting Multiple Records](#).
- To assign an imported email, select it from the list, right-click, and select **Assign To**. See [To assign emails to users](#) for more information.
- To associate an email with another Sugar record, select the email from the Group mail inbox, right-click, and select **Relate**. See [Associating Imported Emails with Other Sugar Records](#) for more information.

Using the Address Book

When composing an email, you can select email recipients from the address book, which lists existing users, contacts, leads, targets, and accounts. By default, all of these individuals are listed in the address book. However, you can filter the list if you want to view a specific group such as contacts or users. You can also search for an individual by first name, last name, email address, or account name.

To use the address book

1. To view the address book, click the **To** button on the Compose Email page.
The **Address Book** window displays on the screen. If the list is paginated, the page number display below. You can click the right arrow to move to the next page or the left arrow to move to the previous page. You can also click a page number to go directly to that page. To move to the first page, click the double-left arrow and to move to the last page, click the double-right arrow.
2. To select email recipients, select them in the address book and click **Add To**. To add recipients to the CC list, click **Add To CC**; to add recipients to the BCC list, select **Add To BCC**.
The selected names display in the Selected column.
3. To filter the listings displayed in the address book, select the filter from the Recipient Type drop-down list.
The address book listing changes to display only the specified individuals.
4. To search for an individual, enter a letter or a keyword such as first name, last name, email address, or account name in the Search field and click the adjacent button. When you enter a letter, Sugar will display all first names, last names, and account names that start with that letter.

Importing Emails into Sugar

Importing emails from external mail accounts or from email clients, such as Microsoft Outlook, enables you to manage them in Sugar. You can assign imported emails to other users for follow-up, and relate them to records. Imported emails display in the My Emails folder. You can also view unread imported emails in the My Emails Dashlet, if you can add it to your Home page.

To import emails to Sugar

1. On the Folders tab, click the inbox of your external mail account in Sugar
2. Select the emails that you want to import, right-click, and select **Import to Sugar**. Alternatively, drag the email from the list to a local folder.

The **Import Settings** window displays on the screen.

3. Enter information for the following fields:

Assigned To. To assign it to a different user, click **Select** to select from the Users List View.

Relate To. To relate the email to another record, select the module from the drop-down list, and then click **Select** to select the record from the module's List View.

Delete message from server. Select this box to delete the email from the external email server after you import it to Sugar.

4. Click **Import to Sugar** to import the emails into Sugar.

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

To assign emails to users

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

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

The **Assign To** dialog box displays on the screen

2. To assign a user, click the **Select** button adjacent to the **Assigned To** field, and choose from the list of existing users.

The selected user's name displays in the **Assigned To** field.

3. To change an assigned user, select **Replace** and then click **Select** to choose a different user.
4. Click **Assign**.

The emails no longer display in your My Emails folder or the Group account folder, but instead, appear in the My Emails folder of the assigned user.

Searching for Imported Emails

You can search for imported emails using one or more of the following fields: Subject, From, To, Date From, Date Until, Relate To, Assigned To, and Attachment. The **Date From** and **Date Until** time range applies to emails that were sent as well as emails that were received.

To search for imported emails in Sugar

1. Navigate to the **Search** tab located in the left-hand panel of the **Emails** home page.

The **Subject**, **From**, and **To** fields display in the panel. Click **More** to view all the Search fields.

2. Enter the appropriate information to search for imported emails in the system.
3. Click **Search**.

The search results display imported emails assigned to you and your direct reports in the List View.

Associating Imported Emails with Other Sugar Records

You can associate an email with records in other modules, such as accounts, contacts, and bugs, during any of the following processes:

- **Importing emails:** In the **Import Settings** window, you can select a record from another module using the **Relate To** drop-down list and the adjacent field.
- **Viewing emails:** When you open an email, click the Quick Create drop-down list to select the record that you want to create, such as a bug, case, contact, lead, or task. Sugar creates the new record and associates it with the email. Related emails are listed in the History sub-panel of the record's Detail View.

Alternatively, select the email from the list, right-click, and select **Relate**. In the **Relate Email** window, select the module from the **Related To** drop-down list, and click **Select** to choose the record with which to relate the email.

- **Composing emails:** You can use the **Relate To** drop-down list and adjacent field, located at the top of the page, to select a record from another module.

To relate an email with another record

1. Select the email from the list, right-click, and select **Relate**.
The **Relate Email** dialog box displays on the screen.
2. Select the record type from **Relate To** drop-down list, and click **Select** to view the list of records and choose one.
3. Click **Relate** to create the association.

The email is now associated with the selected records and is listed in the **History** panel of the record's detail page.

To create a record from an imported email

1. To create a record such as a bug or a case, open the email, click **Quick Create**, and select the record type from the drop-down list.

The appropriate Quick Create form displays on the screen. The screen illustrated below displays the Quick Create form to create a lead.

2. Enter the necessary information and click **Save** to create the record.

If you have not already imported the email, it will be imported and associated with the new record when you use Quick Create to create the record.

Creating Email Templates

You can use email templates to create form letters for automated email responses to inbound emails and for email campaigns. For example, when you receive an email

regarding a bug or a case, you can send out an automatic reply stating that the matter will be addressed.

For email campaigns, you enter the message in the template and then specify the variables such as the target names and addresses from the campaign target list. The system inserts these variables into the template to create a personalized email for each target. When you create an email template, you can embed images and attach files from the Sugar repository or from your local file system.

When you create a template for an email campaign, you can insert tracker URLs into the template to track campaign activity. For more information on email campaigns, see [Executing an Email Campaign](#).

To create an email template

1. Select **Create Email Template** from the **Actions** bar on the **Emails** tab.
If you are creating an email template for email campaigns, navigate to the Email Marketing record from an Email or Newsletter campaign's Detail View, and click the **Create** link that is located next to the Email Template field.
2. Enter information for the following fields:
Name. Enter a name for the template.
Assigned to. To assign the template to a user, click the arrow button and select from the Users list.
Description. Enter a brief description about the template.
Insert Variable. From the drop-down list, select the record (for example **Contact**) and select a field such as **Name** and click **Insert**.
The system displays the variable in the **Body** field.
3. **Insert Tracker URL.** This field displays only when you create the template from the email marketing record of an email campaign. From the drop-down list, select the tracker URL to insert and click **Insert URL Reference**.
The **Body** field displays a link named **Default link text**. The adjoining field displays the tracker name for plain text format. Use this if you want to display the email in plain text format.
4. **Subject.** Enter the title of the message.
5. **Body.** Enter the email message. You can also embed images and add URL links.
To view and use the HTML editor, click **HTML** in the **Body** field.
6. To apply standard formatting options such as font face, size, bold, italics, indentation and color, highlight the text and select the appropriate option in the **Body** field.
7. **Send Text only.** Select this box to display the email in plain text format. You can choose this option if an email client cannot render HTML code.
Attachments: To attach a file, click **Browse** to navigate to its location on your local machine, and select it. To attach an existing document from the **Documents** module, click **Sugar Document** and select it from the **Document List**.

To embed an image file in the template, click the paper clip icon that displays next to the file; to remove the attachment, click the **Remove** button.

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

To manage email templates

- To search for a template, enter the name or description in the **Search** sub-panel on the **Email Templates** page, and click **Search**.
- To view the details of a template, click the template name from the list on the **Email Templates** page.
- To edit the template, on the detail page, click **Edit**, make the changes, and click **Save**.
- To duplicate the template, on the detail page, click **Duplicate** and click **Save**.
- To delete the template, on the detail page, click **Delete**; to delete some or all the templates, select them from the list on the **Email Templates Home** page, and click **Delete**.
- To export one or more templates, select the templates from the list on the **Email Templates Home** page, and click **Export**.
- To deselect templates that you selected in the list, click **Clear All**.

Tasks Module

The **Tasks** Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the this module to schedule and manage tasks.

The **Actions** bar on the **Tasks** tab displays the following options:

Create Task. Select this option to create a task as described in [Creating Tasks](#).

View Tasks. Select this option to view and manage tasks as described in [To manage tasks](#).

Import Tasks. Select this option to import external data into a note as described in [Importing Data](#).

Creating Tasks

Sugar enables you to create tasks and assign them to yourself or to other users. When you create a task, you can relate it to a specific record such as an account or an opportunity. You can also revise the task status and priority at any time to keep your records up-to-date.

To create a task

1. Select **Create Task** from the **Actions** bar on the **Tasks** tab.
2. Enter information in the following fields on the **Tasks** page:

Subject. Enter the subject of the task.

Status. Select the current status of the task, such as **Not Started**, **In Progress**, and **Completed** from this drop-down list.

Start Date. Click the **Calendar** icon and select the start date for the task; When you enter a date, you must also select the time, in hours and minutes, from the adjoining drop-down lists. If there is no specific start date for the task, select the **None** box.

Due Date. Click the **Calendar** icon and select the completion date for the task; enter the time in the adjoining box. If there is no specific deadline for the task, select the **None** box.

Enter the due date information if you want to add the task on your calendar to receive a reminder when it is due.

Priority. Select a priority that reflects the importance of completing the task from this drop-down list.

Description. Enter a brief description of the task.

Related to. Enter the name of the related account or click **Select** to search for one. You can choose related record from other modules, for example, Opportunities, Bug Tracker etc., from this drop-down list.

When you type a character in the field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results. When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies “s f l” (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter “A”, the system displays first names starting with “A”. Similarly, if the Name display format specifies “s l f”, then the system displays last names starting with “A”.

Contact Name. Click **Select** to select an individual from the **Contacts** list. Typically, this is the contact for the specified account.

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

3. Click **Save**.
4. To change the status of the task to **Completed** and create a new one, click **Close and Create New**. The status of the new task, by default, is set to **Not Started**.

To manage tasks

- To edit or delete multiple tasks, use the **Mass Update** panel in the **Actions** drop-down list in the Tasks List View as described in [Editing and Deleting Multiple Records](#).
- To view the details of a task, click its subject in the Tasks List View.
- To edit the information, click **Edit** on the task’s Detail View page, revise the information, and click **Save**.
- To duplicate the information, click **Duplicate** on the task’s Detail View page, make modifications if needed, and click **Save**. Duplication is a convenient way of creating a similar task. You can change the information in the duplicate record to create a new task.
- To import tasks, select **Import Tasks** from the **Actions** bar of the Tasks tab. For more information on importing data, see [Importing Data](#).
- To delete the task, click **Delete** on the task’s Detail View page.

Notes Module

The **Notes** Module has been introduced as a separate module in Release 6.2.0 to allow for ease of use and access. Use the this module to create, view, and import Notes and attachments to records in Sugar.

The **Actions** bar on the **Notes** tab displays the following options:

Create Note or Attachment. Click this option to create a note or an attachment for a call, a meeting, or a task as described in [Creating Notes and Attachments](#).

View Notes. Click this option to create or view notes as described in [Creating Notes and Attachments](#).

Import Notes. Click this option to import external data into a note as described in [Importing Data](#).

Creating Notes and Attachments

You can create and view notes from the Notes module or from the History sub-panel of a record's Detail View. Notes enable you to add comments on a subject and maintain a record of discussions pertaining to a call, meeting, or task. You can also attach supporting documents to a note.

To create a note or add attachments

1. Select the **Create Note or Add Attachments** from the **Actions** bar of the **Notes** module or click the Create icon on any page in the Notes module.
2. Enter information for the following fields in the **Create** (Notes) page:

Contact. Enter the name of the contact. Click **Select** to choose one from the Contacts list or to search for a contact in the list.

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

When you type a character in a field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the search results.

When searching for a name, Sugar respects the Name Display Format setting on the User Preferences page. If the setting specifies "s f l" (Salutation First Last), then Sugar displays a list of first names that start with the specified character. For example, if you enter "A", the system displays first names starting with "A". Similarly, if the Name display format specifies "s l f", then the system displays last names starting with "A".

Subject. Enter the subject of the note. This is a mandatory field, as indicated by the red asterisk.

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

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

Assigned to. Enter the text of the note in this box.

3. To assign the note to a user, scroll down to the **Other** section, and click the arrow button to select a user from the Users list.
4. Click **Save** to create the note or attachment; click **Cancel** to return to the **Notes** home page without saving your changes.

To manage notes

- To edit or delete multiple notes, use the **Mass Update** panel in the **Actions** drop-down list of the Notes List View as described in [Editing and Deleting Multiple Records](#).
- To view the details of a note, click its Subject on the Notes List View.
- To edit the information, navigate to the Detail View of the Note, click **Edit**, revise the information, and click **Save**.
- To duplicate the information, click **Duplicate** in the note's Detail View page. Duplication is a convenient way of creating a similar note. You can change the information in the duplicate record to create a new note.
- To import notes, select **Import Notes** from the **Actions** bar of the Notes tab. For more information on importing data, see [Importing Data](#).
- To delete the note, click **Delete** on the note's Detail View page.

Targets Module

Use the Targets Module to track and manage targets as part of mass marketing campaigns. You can create many types of campaigns as described in [Creating a Campaign](#).

A mass marketing campaign targets a large group of individuals or organizations. Therefore, the campaign process begins with identifying the targets. You can group multiple targets into a target list according to a set of predetermined criteria such as age group or spending habits.

You can associate a record with an existing campaign from Contacts, Leads, and Opportunities.

Creating and importing Targets

A target is an individual that you have some information on, but is not qualified as a lead or contact. Targets are stand-alone records that are not attached to contacts, leads, or opportunities. For more information on Target Lists, see [Target Lists Module](#)

Typically, you would create or import a target list, associate it with targets, and then associate it with a campaign. However, you can also create the campaign first and then associate it with a target list.

The general process is as follows:

Targets → Target List → Campaign

To create a target

1. Select **Create Target** from the **Actions** bar on the **Targets** tab.

Or, click the Create link in any Targets page.

Note: Targets are stand-alone records that are not attached to Contacts or Leads. If you plan to send emails to existing Contacts or Leads, you can skip the step below.

2. Enter information for the following fields in the **Create (Targets)** page:

Target Overview

First Name. Enter the target's first name

Last Name. Enter the target's last name

Title. Enter the designation of the target

Department. Enter the name of the department to which the target belongs

Account Name. Enter the name of the account related to the target

Office Phone. Enter the target's work number

Mobile. Enter the target's mobile phone number

Fax. Enter the target's fax number

Address Information. Enter the address information in the **Primary Address** section and select the **Copy address from left** checkbox to copy it to the Alternate Address section.

Email address. Enter one or more emails addresses for the contact and select Primary. If an email address is incorrect, select Invalid to indicate it. If you sent out campaign emails this contact and the individual chose to opt-out of receiving them, select **Opted Out**.

To add an additional email address, click Add Address. You can add multiple email addresses.

Description. Enter a brief description of the target

More Information

Do Not Call. Select this box to add the target's name to the **Do Not Call** list.

Other

Assigned to. Select the user who has ownership of the account related to the target.

Assigned to. Select the user who has ownership of the account related to the target.

3. Click Save.

This displays the target's Detail View page. You can now add the target to an existing target list. For more information, see .The target's detail page displays the **Campaign Log** sub-panel which lists all the campaigns that were sent to the target.

Target Lists Module

Use the Target Lists Module to track and manage mass marketing campaigns. You can create many types of campaigns as described in [Creating a Campaign](#).

Creating Target Lists

You can use one of the following methods to add targets to a target list:

- Import records from a file (.csv or .tsv). For information on importing targets, see [Importing Data](#).
- Select records from the List View of Accounts, Contacts, Leads, and Targets.

A target list can specify either individuals who need to be included in a campaign or excluded from a campaign. You can create one of the following types of target lists:

Default. A list of people who are campaign targets and receive the campaign email.

Seed. A list of people who need to receive the campaign email but must not be tracked as potential leads. Typically, these are individuals who must approve the campaign before it is launched.

Test. A list of people who receive the campaign email to test how different email clients display the campaign message before you send it out to the default list.

Suppression List. A list of people you want excluded from the campaign email recipient list. Typically, these are people who chose to opt out of receiving your campaign message. Suppression lists can be by ID, email address, or domain.

Note: Test and seed lists are ignored in email tracking statistics.

If you have multiple targets with the same email address, Sugar will send the campaign email to only one of the targets, chosen at random. The other email addresses, considered to be duplicates, are suppressed even though they are not on the opt-out list.

For non-email campaigns, if you have purchased a license for the Sugar Plug-in for Microsoft Word, you can create a form letter in Word for your targets and merge it with names and addresses of your targets in Sugar to create a customized campaign letter for each target. For more information on the plug-in, see *Sugar Plug-in for Microsoft Word*. For more information on performing a mail merge, see [Performing a Mail Merge](#).

To create a target list

1. Select **Create Target Lists** from the **Actions** bar on the Target Lists tab, or click the **Create** link in any **Target Lists** page. Alternatively, you can create or select an existing target list from a Campaign's Detail View.

2. Enter the following information in the **Create** (Target Lists) page:

Name. Enter a name for the target list.

Type. Select the target list type such as Default or Seed from this drop-down list.

User. Enter the name of the individual you want to assign to the record or click **Select** to choose from the User List. By default, this record is assigned to you.

Description. Enter a brief description of the target list

3. Click **Save**.

You can now add records to the target list from the List View of Accounts, Contacts, Leads, and Targets.

Campaigns Module

Use the Campaigns Module to track and manage mass marketing campaigns. You can create many types of campaigns as described in [Creating a Campaign](#).

Creating a Campaign

You can create a campaign using the **Campaign Classic** option or the **Campaign Wizard** option. When you use the **Campaign Classic** option, you are creating a campaign record but you are not completing related tasks such as specifying the email settings. For more information on creating a campaign using the Classic option, see [Creating a Campaign](#).

When you use the **Campaign Wizard**, it guides you through the process of creating the campaign as well as completing related tasks. For more information on creating a campaign with the Campaign Wizard, see [Using the Campaign Wizard](#).

The Campaigns module provides an embedded Return on Investment (ROI) form that you can use to gauge the success of an executed campaign. For more information, see [Viewing a Campaign's Return on Investment](#).

Types of Campaigns

You can create the many types of marketing campaigns such as Email, Newsletter, Mail, Web, Radio, Television, Print, and Telesales.

When you create a campaign such as Mail and Radio, you are creating a record in Sugar for your reference. However, you cannot execute the campaign through Sugar.

When you create an email campaign or a newsletter campaign, you can execute it through Sugar. An email campaign is a one-time email containing information that is of interest to your targets. A newsletter campaign is an email campaign containing a newsletter sent to your targets at periodic intervals. For example, a newsletter can contain information on product updates. You can send out a newsletter on a weekly, monthly, quarterly, or yearly basis. To measure the campaign's success, you can view statistics such as the number of targets that responded, the number of opportunities that were created, and the generated revenue.

After you launch an email or newsletter campaign, you can view its status to determine its success. For example, you can view how many targets viewed the campaign email, how many clicked any links that were included in the email, and how many leads and contacts were created from the campaign. For more information, see [Managing Campaigns](#).

To capture leads from an email or a newsletter campaign, you can create a Web-to-Lead form. For more information, see [Creating Web-to-Lead Forms](#).

For email campaigns, you can embed images to your email templates instead of sending them as attachments to prevent the email from being reported as spam. For more information on attaching images, see [Creating Email Templates](#).

A campaign diagnostic tool is provided to help ensure that all pending administrative tasks, such as setting up a bounce-handling inbox, have been completed. For more information, see [Using the Campaign Wizard](#).

Note: You must be an administrator to use the **Email Setup** option that displays in the **Actions** bar.

To create a campaign

1. Select **Create Campaign (Classic)** from the **Actions** bar on the **Campaigns** tab.
2. Enter information for the following fields:

Name. Enter the campaign name.

Assigned to. Enter the name of the user assigned to the campaign; to choose a user from the Users list, click **Select**, and click the user name.

Status. Select the current status of the campaign from the drop-down list.

Start Date. Click the **Calendar** icon and select the date on which the campaign begins.

End Date. Click the **Calendar** icon and select the date on which the campaign ends.

Note: The Start Date, End Date, and Status values are for your records only. These values do not impact the execution of an email marketing campaign.

Type. From the drop-down list, select the campaign type such as email or trade show. For more information on email campaigns, see [Executing an Email Campaign](#).

Currency. From the drop-down list, select the currency used to calculate the budget, cost, and revenue.

Impressions. Enter the number of page impressions generated from the campaign. You will need to fill in this field after the campaign has commenced.

Budget. Enter the budget for the campaign.

Actual Cost. Enter the actual cost incurred to conduct the campaign.

Expected Revenue. Enter the estimated revenue from the campaign.

Expected Cost. Enter the estimated cost of the campaign.

Objective. Explain the goal of the campaign.

Description. Enter a brief description of the campaign.

3. Click **Save** to save the campaign; click **Cancel** to return to the Campaigns home page without creating the campaign.

Sugar displays the campaign's Detail View on the screen. This page contains sub-panels for targets, tracker URLs, and email marketing to create and view relevant information.

Executing an Email Campaign

Both the administrator and the user must perform a set of tasks to send an email campaign.

The administrator must complete the following tasks:

- Set up outbound emails to enable you to send out email campaigns, and specify the number of campaign emails in each batch.
- Specify a bounce-handling inbox to route campaign emails that bounce back to you. Bounced emails contain specific identifiers that set them apart from emails that are responses from your targets.
- Set up Scheduler jobs to process nightly mass email campaigns and bounced campaign emails.

The user must complete the following tasks:

1. Create an email campaign as described in [To create a campaign](#). Alternatively, you can use the Campaign Wizard to create the campaign as described in [Using the Campaign Wizard](#). The Campaign wizard will guide you through the steps listed below.
2. Specify the targets as described in [Creating and importing Targets](#). You can import targets, create a new target list, or merge with existing target list.
3. Create an email template containing the message you want to convey to your targets. For more information, see [Creating Email Templates](#).
4. Set up tracker URLs to track response to your campaign. For more information, see [Creating Tracker Redirect URLs](#).

For more information on creating a mailbox, see [Email Settings](#).

5. Create an email marketing record that specifies information such as the target list, the email template, the campaign start date, and the bounce-handling inbox. For more information, see [Creating Email Marketing Records](#).
6. Optionally, specify one or more Tracker Redirect URLs to track campaign activities. For more information, see [To create a tracker redirect URL](#).
7. Optionally, run the diagnostic tool to ensure that the email campaign will be successfully executed. For more information, see [To run diagnostics](#).
8. Send a test email to your test list to ensure the operation is successful. For more information on test lists, see [Creating and importing Targets](#).
9. Clear statistics from the test email.
10. Request the administrator to schedule a job to send out the campaign emails.
11. Queue the email for the campaign launch.
12. Optionally, convert the campaign targets into leads or contacts.

You can associate a Web-to-Lead form with the campaign. For more information, see [Creating Web-to-Lead Forms](#).

After you launch an email campaign, you can view the campaign status for information on the campaign results. For more information, see [Viewing Campaign Status](#).

Note: The start date, start time, and status specified on the email marketing page determine when the email is sent.

Creating Email Marketing Records

When you create an email campaign, you must also create an email marketing record that contains information on when and how the newsletter should be distributed. This includes the campaign target list, the email template, and the inbox to route bounced emails. The specified start date and time must pass before the campaign is queued for delivery. Emails that bounce back are sent to the From address defined in this record.

To create an email marketing record

1. In the campaign's Detail View, scroll down to the **Email Marketing** sub-panel and click **Create**.
2. On the **Email Marketing** page, enter information for the following fields:

Name. Enter a name for the record.

Status. From the drop-down list, select **Active** if the record is in use; only active records are queued for the campaign launch. Select **Inactive** if the record is not in use.

Use Mailbox. From the drop-down list, select a mailbox that is set up for Bounce Handling.

From Name. Enter the name of the organization or person that is sending out the email.

Start Date & Time. Click the **Calendar** icon and select a date to send out the email. Enter the time in the adjoining field.

Note: To queue the email for campaign launch, select a date and time that have not already passed. Do this after you ensure that the test email was successful.

Email Template. From the drop-down list, select an existing email template; to edit a template or create a new one, click the adjoining **Create** or **Edit** link respectively.

You will need to edit the template to add the Tracker URLs described below into Text and HTML formats.

Send This Message to. Select one or more target lists from the box below; to send it to all the target lists in the box, select the **All Target Lists in the Campaign** box.

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

Creating Tracker Redirect URLs

A campaign email can contain not only the campaign message but also images and links. Links can direct targets to other URLs such as an external website or a **.php** file on your system.

You can create an Opt-out tracker URL to embed a “Unsubscribe” link that enables targets to unsubscribe themselves from your campaign mailing list. When targets click on the Opt-out link, the system logs the action for your records.

You can use one or more tracker URLs in your campaign emails to track the response to your campaign. The system generates a unique key for each URL and recipient and associates it with the email template. When recipients open the email and click on a URL link, the system uses the unique key identifier to track their action.

The Status page displays a Recipient Activity bar chart listing actions, such as Viewed Message and Opted Out. You can drill down the chart to view the list of recipients who performed a specific action. For more information, see [Viewing Campaign Status](#).

Note: Before you create a campaign email, check with your system administrator to ensure that the outbound email process is configured to send emails from your system.

To create a tracker redirect URL

1. On the Campaign’s detail page, scroll down to the **Tracker URLs** sub-panel, and click **Create**.

2. On the **Campaign Trackers** page, enter information for the following fields:

Tracker Name. Enter a tracker name for your reference; use alpha-numeric characters.

Tracker URL. Enter the tracker URL; for example, <http://www.sugarcrm.com>.

Opt-out Link? Select this box to embed your **Unsubscribe** instructions in a tracker URL. By default, the system uses the *removeme.php* file which contains these instructions, and displays this file name in the Tracker URL field.

3. To create the campaign tracker, click **Save**; click **Cancel** to exit the page without saving your changes.

Sugar generates the tracker URL and displays it as “URL for Campaign Message”.

You can now insert this tracker URL into an email template of your choice. To create an email template containing tracker URLs, access the Email Template Editor from within an Email Marketing record. For more information on email templates, see [Creating Email Templates](#).

Using the Campaign Wizard

You can use the Campaign Wizard to guide you through the process of creating a campaign.

To create a campaign using the Campaign Wizard

1. Select **Create Campaign (Wizard)** From the **Actions** bar on the Campaigns tab.
This displays the Campaign wizard.
2. Select the type of campaign you want to create and click **Start**.
3. Enter information for the following fields:
 - **Name.** Enter the campaign name.
 - **Status.** From the drop-down list, select the current state of the campaign.
 - **Assigned to.** Enter the name of the user who is assigned to the campaign. To select from the **Users** list, click **Select**. By default, it is assigned to you.
 - **Type.** If you are creating a non-email campaign, select the campaign type from the drop-down list.
 - **Frequency.** This field displays only for newsletter campaigns. From the drop-down list, select the intervals at which the newsletter will be emailed to targets.
 - **Start Date.** Enter the campaign start date; click the **Calendar** icon to select the date.
 - **End Date.** Enter the campaign end date; click the **Calendar** icon to select the date.
 - **Description.** Optionally, enter a brief description of the campaign.
4. Click **Next** to enter the campaign budget information.
5. Enter information for the following fields:
 - **Budget.** Enter a numerical value for the campaign budget.
 - **Actual Cost.** Enter the actual cost of the campaign.
 - **Impressions.** The number of times the campaign advertisement is viewed on the web.
 - **Expected Cost.** Enter the expected cost of the campaign.
 - **Expected Revenue.** Enter the estimated revenue from the campaign.
 - **Currency.** From the drop-down list, select the currency used for the campaign.
6. Click **Next** to enter the tracker URL information.
7. Enter information for the following fields:

Tracker Name. Enter a tracker name.

Opt-out link? Select this box to create an opt-out tracker that allows targets to unsubscribe from your email campaigns.

If a target chooses to opt out of an email campaign, the system suppresses the target's information to ensure that they never receive any of your email campaigns

or newsletter campaigns. The system also automatically selects the **Email Opt Out** option on the target's detail page.

However, if a target chooses to unsubscribe from a newsletter campaign, the system suppresses the target information only for that specific campaign. You can still include it in target lists for other newsletter campaigns and email campaigns.

Tracker URL. Enter the tracker URL. For more information, see [Creating Tracker Redirect URLs](#).

8. Click **Create Tracker**.

Sugar displays the new tracker.

To create additional tracker URLs, click **Create Tracker** again and enter the new tracker information.

9. Click **Next**.

If you are creating an email campaign or a non-email campaign, Sugar displays the Target Lists on the screen.

For a newsletter campaign, the Subscription Information page displays on the page.

- a. To use an existing target list, click **Select** and use the **Search** panel to find the list.
- b. To create a new target list, enter its name in the **Target List Name** field and select the type from the adjoining **Target List Type** field.

Sugar displays the target list name below.

10. For newsletters, you must create the following three subscription lists:

- **Subscription list:** These targets receive the newsletter regularly.
 - **Unsubscription list:** These targets are those who have chosen to opt-out of your mailing list.
 - **Test list:** These targets are the recipients of the test email that you send out to ensure it is successful.
- a. To create a custom list, select **Allow Select** and click **Select** to search for targets and create the list.
 - b. For a system-generated list, select **Auto-Create** and the system displays the name of the list in the field above the **Select** button.

11. To save the campaign information and begin the process of specifying other details such as the email settings, click **Save and Continue**. If you plan to specify the email settings later, click **Finish**.

When you click **Save and Continue**, the Marketing Email page displays on the screen. For more information, see [Creating Email Marketing Records](#).

After clicking **Finish**, the campaign's Detail View displays on the screen.

You can edit the information and create an email marketing record from this page.

Running Campaign Diagnostics

Executing an email campaign or a newsletter campaign involves several steps, some of which can be performed only by your administrator. The campaign diagnostic tool

enables you to check if all pending administrative tasks have been completed before you attempt to launch the campaign.

To run diagnostics

1. From the Campaigns tab, select **Diagnostics**.

Sugar displays the **Campaign Diagnostics** page on the screen.

If the email settings and a bounce-handling inbox have not been configured, warning messages display on this page. Contact your administrator to complete these tasks.

2. To perform the diagnostics again, click **Re-Check**.

Testing Campaigns


Before you launch an email or newsletter campaign, it is recommended that you test it to check how different email clients display the campaign message.

To test a campaign click **Send Test** and on the Campaign's detail page, select the message, and click **Send**. Ensure that you are sending out the campaign to the Test target list.

Note that in test mode, the system disables your suppression lists. Therefore, the campaign message is sent to targets on your suppression lists. The system also disables checks for duplicate email addresses, thereby allowing users to send a message multiple times.

Managing Campaigns

Managing campaigns includes tasks such as sorting, editing, and duplicating campaign information.

- To sort the list view, on the Campaigns Home page, click any column title which has the  icon beside it; to reverse the sort order, click the column title again.
- To update information for some or all campaigns, on the **Campaigns** home page, use the **Mass Update** panel as described in [To edit or delete multiple records](#).
- To view the campaign's details, click the campaign name on the list. From the detail page, you can create Tracker URLs and Email Marketing Records for email campaigns. For more information on email campaigns, see [Executing an Email Campaign](#).
- To edit the campaign information, on the detail page, click **Edit**.
- To duplicate the campaign information, on the detail page, click **Duplicate**. Duplication is a convenient way of creating a similar campaign. You can change the information in the duplicate record to create a new campaign.
- To perform a mail merge, on the detail page, click **Mail Merge**. For more information, see [Performing a Mail Merge](#).
- After you launch non-email campaign such as a Telesales or a Mail campaign, you will need to mark the campaign manually as "sent". To do this, click **Mark as Sent** on the campaign's detail page. When you click this button, the **Campaigns**

sub-panel on a targets' detail page indicates the **Activity Type** as **Message Sent** to indicate that the campaign material was sent to that individual.

- To delete a campaign, on the detail page, click the **Delete**.
- To send an email campaign to the test group before the formal launch, click **Send Test**.
- To queue email campaigns for the launch, click **Send Emails**.
- To send out the campaign message to the target audience, click **Send**, and on the **Campaign Send** page, select the message and click **Send**.
- To view the campaign status, see [Viewing Campaign Status](#)
- To track changes to a campaign over time, in the Detail View, click the **View Change Log** link.
- To export information on one or more campaigns, select them in the **Campaigns** List View page, click the **Export** option in the **Actions** drop-down list, and export them as described in [To export data from Sugar](#).
- To view or manage related records in a sub-panel, see [To manage related information in sub-panels](#).

Viewing Campaign Status

After you launch a campaign, you can view its results on the Campaign Status page to determine its success. A campaign's status displays data such as the number of messages sent and the number of messages that bounced back; how many targets viewed the campaign message, the number of lead and contact records that were created, and so on. This enables you to evaluate the effectiveness of the campaign for further action. For example, you can add targets that opted out of the campaign to the Unsubscription target list to ensure that they are not recipients of campaign emails in the future.

The sub-panels in the Detail View display the following information:

- A chart depicting the responses from campaign targets. This includes how many targets viewed the message, how many open any links that were included in the campaign email, and how many opted out of the campaign
- A list of any campaign emails that are still in the queue.
- A list of processed campaign emails.
- A list of targets who viewed the campaign email.
- A list of targets who viewed any links that were included in the campaign email.
- A list of leads resulting from the campaign. Leads are created when targets identify the campaign and, as a result, are converted into leads.
- A list of contact records that were created as a result of the campaign. These contacts are created when leads identify the campaign and, as a result, are converted into contacts.
- A list of campaign emails that bounced back because of invalid email addresses. This information is tracked only if your administrator has scheduled a job to track bounced emails.

- A list of campaign emails that bounced back for other reasons.
- A list of targets that opted out of the campaign.
- A list of email addresses that were added to the Suppression list. These include those that you added to the list, those that were marked as “Opt Out”, and email addresses that were invalid.
- A list of opportunities that were generated from the campaign.

To view a campaign’s statistics, click **View Status** on the **Campaign** detail page.

The system displays the campaign’s status information such as the targets’ response, number of leads created, and so on.

Viewing a Campaign’s Return on Investment

For any campaign that you execute, Sugar provides an embedded ROI report based on the “Closed/Won” opportunities generated from the campaign. You can view this report from the campaign’s detail page.

To view a campaign ROI report

1. Navigate to the campaign’s Detail View.
2. Click the **View ROI** option that is located next to the View Status option.

Sugar displays the ROI chart on the screen. This chart displays the actual revenue versus the expected revenue generated from the campaign, as well as the actual cost of running the campaign versus the budget allocated for the campaign.

Creating Web-to-Lead Forms

You can create a Web-to-Lead form to capture leads from web-based campaigns or other web-based sources such as your website. When campaign targets submit the form, it is saved as lead information in the Sugar database. You can use this lead information to generate more opportunities for your organization.

When you generate a Web-to-Lead form, it is saved to the cache/generated_forms folder, from where you can copy it to other locations. You can view and edit generated forms in the TinyMCE editor. Only administrators can add additional fields to the form.

To create a lead form

1. Select **Create Lead Form** from the **Actions** bar on the **Campaigns** tab.
This displays the Lead Form Wizard page.
2. Click and drag the desired fields from the **Available Fields** list to the **Leads Form (First Column)** or the **Leads Form (Second Column)** list.
To move all the fields, click **Add All Fields**.
3. Click **Next**.
4. Enter information for the following fields:

Form Header. The default header displays. You can delete it and enter the desired header information.

Form Description. Enter a brief description of the form.

Submit Button Label. The default label displays on the page. You can delete it and enter the desired label.

Post URL. The default location where the lead information will be stored displays on the page. To edit this information, select the **Edit post URL?** box and then enter the new location.

Redirect URL. Enter the URL to the page that you would like your leads to view after submitting their information. If you do not specify a URL, Sugar will display a “Thank you for your Submission” message.

Related Campaign. Enter the name of the campaign that is related to this lead form. To select from the Campaigns list, click **Select**.

Assigned to. Enter the name of the individual you want to assign to the record or click **Select** to choose from the User List. By default, this record is assigned to you.

Form footer. Enter the form footer, if needed.

5. Click **Generate Form**.

This displays the form in the TinyMCE editor. Modify the form if needed and click **Save Web To Lead Form**.

6. To save the form, you can do one of the following:

- Copy and paste the HTML from the box to a text file on your local machine.
For On-Premise Sugar systems, the system saves it in the *cache/generated_forms* folder on the Sugar server. You can copy it from the cache to a different location.
- To save the generated form as a .htm file on your local machine, you can right-click **Web to Lead Form**, open the page in a new tab, select **Save Page As** from the browser’s File menu and navigate to the location where you want to save it.

7. To view the form, click the **Web To Lead Form** link at the top of the page.

Performing a Mail Merge

You can create a form letter template for campaigns using the Sugar Plug-in for Microsoft Word and merge it with your target list to create personalized letters for each target. Typically, you perform a mail merge for non-email campaigns.

Note: You must purchase a license for Sugar Plug-in for Microsoft Word.

The process of performing a mail merge is as follows:

1. Ensure that your Administrator has enabled the Mail Merge option for your organization.
2. Ensure that you have enabled the Mail Merge option on your User Preferences page.

3. Define a template in Sugar Plug-in for Microsoft Word and upload it to Sugar.
4. In the Campaigns module, create a non-email campaign.
5. Create your target list and populate it with names and addresses from your list of contacts, leads, and targets. To notify your manager or other users, you can also add those individuals from the Users list.
6. Perform a mail merge to merge the target addresses with the campaign letter to create personalized letters.

To perform a mail merge

1. Click **Mail Merge** in the Campaign's Detail View page.

This displays the **Step 1: Selected Module and Template** page. The Campaigns module is auto-selected in the **Selected Module** drop-down list.
2. Select the mail merge template from the **Select Template** drop-down list and click **Next**.

Step 2 of the Mail Merge process displays on the page. The targets specified in your targets list display in the **Available** list.
3. Select the targets in the **Available** list and using the right arrow, move them to the **Selected** list.
4. Click **Next**.

The final step of the Mail Merge process displays your selections for review. If you need to go back to the previous step to modify the target list, click **Back**.
5. Click **Begin Merge**.
6. Ensure that **Open with Word** is selected and click **OK**.

The merged document displays on the page.

The system creates a log entry for each target for your records. You can view these entries when you click the **View Status** option on the campaign's detail page. If you perform mail merge operations repeatedly for these campaign targets, the system updates these log entries.

Bug Tracker Module

Use the Bug Tracker module to report, track, and manage product bugs.. Bugs are defects or features associated with a particular revision of a product. The administrator populates the drop-down list of product releases. After you create a bug, you can associate it with the related case.

Note: This module is hidden by default. The administrator must display it for your use.

Creating Bugs

You can create a bug in Sugar, or import them into Sugar as a comma-delimited, tab-delimited, or custom delimited file.

To create a bug

Follow the steps listed below to create a bug:

1. Select **Report Bug** from the **Actions** bar on the **Bug Tracker** tab.
2. Enter information for the following fields in the **Create (Bug)** page:
 - Subject.** Enter a brief statement of the problem.
 - Priority.** Specify the urgency of the problem in this drop-down list.
 - Source.** Specify whether the bug was reported by an internal user (internal), external user through email (email), through your organization's website (web), or by an external developer community member on your organization's forum (forum).
 - Category.** Select the product associated with the bug from this drop-down list.
 - Found in Release.** Select product version in which the bug was found from this drop-down list.
 - Type.** Select **Defect** from this drop-down list if the issue is a problem with the product. Select **Feature** if the issue is a suggested enhancement for the product.
 - Status.** Specify the current status of the problem such as **New** or **Closed** from this drop-down list.
 - Resolution.** Select the resolution to the bug from this drop-down list.

Fixed in Release. Select the product version in which the bug was fixed from this drop-down list.

Description. Description of the problem.

Work Log. Record your actions to resolve the bug.

Specify the following information in the **Other** section:

Assigned to. Enter the name of the individual you want to assign to the record or click **Select** to choose from the User List. By default, this record is assigned to you.


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

This displays the Detail View page for the bug. Associate the bug with related records such as contacts and projects on this page. You can also create a new case for the bug or associate it with an existing case. For more information on creating cases, see [Cases Module](#).

Managing Bugs

Managing bugs includes tasks such as editing, deleting, importing, and exporting records.

To manage bugs

- To sort a List View, click any column title that has the  icon beside it; to reverse the sort order, click the column title again.
- To edit or delete some or all the bugs, select **Mass Update** from the **Actions** bar. For more information, see [To edit or delete multiple records](#).
- To import records, click **Import Bugs** from the **Bug Tracker Actions** bar. For more information on importing data, see [Importing Data](#).
- To export records, select them from the list, click the **Export** link from the **Actions** drop-down list and follow the process described in [Exporting Data](#).
- To merge duplicates, click the **Merge** link from the **Actions** drop-down list and following the process described in [Merging Duplicate Records](#).
- To view the details of a bug, click the bug in the **Subject** column on the **Bug Tracker** home page (List View).
- To edit the bug details, click **Edit** on the Detail View page.
- To duplicate a bug, click **Duplicate** on the Detail View page. Duplication is a convenient way of creating a similar bug. You can change the information in the duplicate record to create a new bug.
- To delete a bug, click **Delete** on the Detail View page.
- To track changes made to the bug over time, click **View Change Log** in the Detail View page.

- To export information on one or more bugs, select them from the List View, click **Export** from the **Actions** drop-down list, and export them, following the instructions in [To export data from Sugar](#).
- To create or manage related records in a sub-panel, see [To manage related information in sub-panels](#).
- To archive a related email, scroll down to the **History** sub-panel in the Detail View where related emails are listed and click **Archive Email**. This displays the **Create Archived Email** form. Copy-paste information related to the email into this form to save it for your records.

Cases Module

Use the **Cases** module to track and manage services-related problems reported by your users and customers.

After you create a case, you can associate it with related bugs.

Creating Cases

You can create cases in Sugar and you can also import them into Sugar as a comma-delimited, tab-delimited, or custom delimited file. To import cases, select **Import Cases** from the Cases **Actions** bar. For more information on importing data, see [Importing Data](#).

To create a case

Follow the steps listed below to create a case:

1. Select **Create Case** from the **Actions** bar on the **Cases** tab
or, Click the Create icon on any page within the **Cases** module.
1. Enter information in the following fields on the **Cases** page:
 - Priority.** Specify the urgency of the problem from this drop-down list.
 - Status.** Specify the current status of the problem, such as **New** or **Closed**, from this drop-down list.
 - Type.** Select Administration, User, or Product from this drop-down list if you want to categorize the case.
 - Subject.** Brief statement of the problem.
 - Account Name.** Name of associated account or click **Select** to choose the account.
 - Description.** Description of the problem.
 - Resolution.** Results of the investigation into the problem.

Specify the following information in the **Other** section:

 - Assigned to.** Name of the individual you want to assign to the record or click **Select** to choose from the User List. By default, this record is assigned to you.


Case owners receive an email whenever a case is assigned to them if the administrator has enabled email notification.
2. Click **Save** to save the case; click **Cancel** to exit the page without saving the case.

This displays the Case Detail View page. Create new bugs for the case or associate it with existing bugs on this page. For more information on creating bugs, see [To create a bug](#). You can also associate the case with new or existing records such as contacts and activities.

Managing Cases

Managing cases includes tasks such as editing, deleting, importing, and exporting records.

To manage cases

- To sort a list view, click any column title which has the  icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple accounts, select multiple records in the Cases List View and click the **Mass Update** link in the **Actions** drop-down list. For more information, see [Editing and Deleting Multiple Records](#).
- To view the details of a case, on the **Cases** home page, click on the case name in the list. This displays the Detail View page.
- To edit the case details, click **Edit** on the Cases Detail View, update the information, and click **Save**.
- To import records, select **Import Cases** from the **Actions** bar on the **Cases** tab. For more information on importing data, see [Importing Data](#).
- To export information on one or more cases, select them in the Case List sub-panel on the Cases Home (List View) page, click the **Export** link in the **Actions** drop-down list, and export them as described in [Exporting Data](#).
- To merge duplicates, select the records from the **Cases** List View, click the **Merge** link from the **Actions** drop-down list, and follow the process described in [Merging Duplicate Records](#).
- To duplicate a case, click **Duplicate** on the **Cases** Detail View page. Duplication is a convenient way of creating a similar case. You can modify the information in the duplicate record to create a new case.
- To find duplicates, click **Find Duplicates** on the Detail View page.
- To delete a case, click **Delete** on the Detail View page.
- To track changes to the case over time, click **View Change Log** on the Detail View page.
- To create or edit related records in a sub-panel, see [To manage related information in sub-panels](#).
- To archive a related email, scroll down to the **History** sub-panel in the Detail View, where related emails are listed, click **Archive Email**. This displays the **Create Archived Emails** page. Copy and paste information related to the email into this page and save it for your records.

Documents Module

Use the **Documents** module to create and manage files that you share with users and contacts.

Creating Documents

You can create a library of documents and graphics that you can share with other users and contacts, ranging from marketing collateral to contracts. You can also create templates for frequently used documents.

To create a document

1. Select **Create Document** from the **Actions** bar on the **Documents** tab or click the Create icon on any page within the **Documents** module or

Go to the Detail View of any module that has the **Documents** subpanel (for example, **Accounts**).

2. Enter information for the following fields on the **Documents** page:

File Name. Name of the file you are using to create the document; click **Browse** to navigate to the location of the document.

Document Name. Enter a name for the document.

Document Type. Select a pre-defined document from this drop-down list. If the document does not belong to any of the listed types, select **None**.

Publish Date. Click the **Calendar** icon and select the date when the document is published for other users to view and download it.

Expiration Date. Click the **Calendar** icon and select the date when the validity of the document expires. For example, collateral for a sales campaign may not be useful after the campaign ends.

Status. Select the status from this drop-down list, to indicate the current state of the document such as **Draft** or **Under Review**.

Revision. Enter the revision number if you revised this document.

Template. Select this box if you are creating a template.

Category. Select a pre-defined category from this drop-down list. Select **None** if none of the categories apply.

Sub Category. Select the applicable category subset if you selected a category.

When you select a category and sub-category for the document, the document is added to the Document tree using a hierarchical structure. The tree structure

displays in the List View to make it easier to find documents under a specific subject. The administrator defines the category and sub-category values.

Related Document. Click **Select** to associate a related document.

Related Document Revision. This is auto-populated by the revision number of the associated document.


Description. Enter a brief description of the document.

3. Click **Save** to create the document; click **Cancel** to return to the document list without saving the document.

Managing Documents

Managing documents includes tasks such as editing, deleting, and tracking changes.

To manage documents

- To sort a List View, click any column title which has the  icon beside it; to reverse the sort order, click the column title again.
- To edit or delete information related to multiple documents, select multiple records in the Documents List View and click the **Mass Update** link in the **Actions** drop-down list. For more information, see [To edit or delete multiple records](#).
- To view the details of a document, click the document name in the List View.
- To view an attachment, click the **attachment** link; To update an attachment, see [To update an attachment](#).
- To edit a document, click **Edit** on the Detail View page.
- To duplicate an opportunity, click **Duplicate** on the Detail View page. Duplication is a convenient way of creating a similar document. You can change the information in the duplicate record to create a new document.
- To delete a document, click **Delete** on the Detail View page.
- To export documents, select them from the Documents List View, click **Export** in the **Actions** drop-down list and follow the process described in [Exporting Data](#).
- To create or manage related records in a sub-panel, see [To manage related information in sub-panels](#).

To update an attachment

1. Click **Create** in the **Document Revisions** sub-panel of the document's Detail View page.

This displays the **Document Revisions >> Create** page.

2. Enter information for the following fields:

FileName. Enter the name of the file containing the revised information; to navigate to the file location, click **Browse**.

Revision. This field is auto-populated with the revision number.

Change Log. Enter a brief description of the revision.

3. Click **Save** to save your changes; click **Cancel** to go back to the document detail page without saving your changes.

You cannot change the name of the attached file. The revised file is displayed along with its revision number in the **Documents Revisions** sub-panel. The row listing the older document version now displays the **rem** icon to remove the file.

4. To remove the previous version of the attachment, click the **rem** icon, and click **OK** to confirm the removal.

Identifying MS Word Mail Merge Templates

You can identify Microsoft Word mail merge templates in the **Documents** module. These templates are used when a mail-merge is performed directly from within Sugar and can be created from the Sugar Plug-in for Microsoft Word and uploaded to the Sugar document repository.

- The document type displays as **Mail Merge** on the Detail View page if it is a Mail Merge template.
- A link allows direct access to the Sugar Mail Merge Wizard in the navigation bar.

Projects Module

Use the Projects Module to create and manage projects for your organization.

Every project is assigned to a user. The assigned user is the project manager. By default, this is the user who created the project. The assigned user can assign the project to another user

Note: By default, this module is hidden. The administrator must display it in order to enable you to use it.

Creating Projects

In the Projects module, you can create, manage, and duplicate projects and project tasks.

You can define multiple project tasks for each project. When you create a project task, you must associate it with a project. You can associate a project with multiple activities, accounts, opportunities, and cases. You can also create projects and project tasks from an email's detail page.

To create a project

1. In the **Actions** bar, click **Create Project**.
2. On the **Projects** page, enter information for the following fields:
 - Name.** Enter a name for the project.
 - Status.** From the drop-down list, select the project status such as Draft, In Review, or Published.
 - Start Date.** Click the **Calendar** icon and select the project start date.
 - End Date.** Click the **Calendar** icon and select the project end date.
 - Assigned to.** Enter the name of the user who has ownership of the project. By default, it is assigned to you.
 - Priority.** From the drop-down list, select the importance of the project such as Low, Medium, or High.
 - Description.** Enter a brief description of the project.
3. Click **Save** to create the project; click **Cancel** to exit the page without creating the project.


When you save the project, the project's detail page displays on the page.

From this page, you can relate the project to records such as contacts and opportunities.

To create a project task

1. In the **Project Tasks** sub-panel, click **Create**.
2. On the **Project Tasks** page, enter information for the following fields:
 - Name**. Enter a name for the task.
 - Task ID**. Enter a numerical value as the task identification number.
 - Start Date**. Click the **Calendar** icon and select the date when the task is due to begin.
 - Finish Date**. Click the **Calendar** icon and select a date when the task is due to be completed; enter the start time in the adjoining field.
 - Percentage Complete**. Enter a numerical value to indicate what percentage of the task has been completed.
 - Priority**. From the drop-down list, select a priority level that reflects the importance of completing this task.
 - Milestone**. Check this box if the completion on this task is considered a milestone for project completion.
 - Project Name**. Click **Select** and choose the project associated with the task.
 - Description**. Enter a brief description of the task.
3. Click **Save** to create the task; click **Cancel** to return to the project detail page without creating the task.

To manage a project

- To sort the list view on the Projects Home page, click any column title which has the  icon beside it; to reverse the sort order, click the column title again.
- To search for a project, see [Searching for Information in Sugar](#).
- To update or delete some or all the projects on the Projects Home page, use the **Mass Update** panel as described in [To edit or delete multiple records](#).
- To view the details of a project, click its name in the list view.
- To edit the project details, click **Edit** on the project's detail page, make the necessary changes, and click **Save**.

Employees Module

Use the Employees module to view information such as name, title, and email address for employees in your organization.

All Sugar users are employees, not all employees are Sugar users. An employee needs a username and password to log into Sugar to be a user.

Creating Employees

Administrators can create and manage employee records. Users can only view an employee's record.

To create and manage an employee record

1. Select **Create Employee** from the **Actions** bar of the **Employees** tab.
The **Employees** page displays on the screen.
2. Enter the employee's information such as name and phone numbers.
To add the employee's photo, click the **Browse** button located next to the **Picture** field, navigate to the location of image file and upload it into the record. You can upload the image file in JPG or PNG format.
3. Click **Save** to create the record; click **Cancel** to exit the page without creating the record.
Sugar displays the record in the List View of the Employees Home page.
4. To update information on the supervisor or status of multiple employees, use the Mass Update panel as described in [Editing and Deleting Multiple Records](#).
5. To delete an employee, click the Delete button in the record's Detail View.

To view or contact an employee

- To search for an employee, use the **Search** sub-panel located above the Employees list.
- To view an employee's details such as the title and contact information, click the employee name in the list.
- To email an employee, click the user's email address to open Microsoft Outlook and create the email.

Importing Data

Import data for modules such as Accounts, Contacts, Leads, Opportunities, Targets, Calls, Meetings, and Tasks with the help of an easy-to-use **User Import Wizard**. Refer to the tool-tips and instructions provided in the wizard at every step of the import process.

Note: Always import the Account data first and then import Contacts, Leads, and other data. This enables Sugar to create a relationship automatically between an Account and associated Contacts, as well as other records containing the same Account name.

Features of the User Import Wizard are listed below:

- Sample .csv file for easier import of data — Use the available sample .csv file as a template for import of files
- Retain settings from previous imports — Save/preserve import file properties, mappings, and duplicate check indexes from previous imports for ease of current data import process
- Ability to accept both database name and display labels of drop-down and multi-select field items — Field labels as well as database names are accepted and mapped during import, but only the field labels are displayed for ease of use
- Ability to accept both usernames and full names in user fields during import and export of data — Full names of Users displayed for Assigned To and other User-related fields in exported .csv file for easier identification of user records
- Ability to auto-detect file properties in import file — Upload import files without specifying file properties such as tab, comma, double and single quotes, date and time formats, making the process simpler and faster

Importing data

Follow the steps listed below to import data for a module, such as Accounts:

1. Select Import from the **Actions** bar on the module's tab.

This displays **Step 1** of the import process with a link to a sample **Import File Template**.

2. Upload your import file to this page using the Browse button in the Select File field or,

Optionally, download the available template, delete the existing data, input your data and upload to this page using the Browse button.

3. Click **Next**.
4. This displays Step 2 (Confirm Import File Properties).
Auto-detection of imported data takes place at this step.
5. Click **View Import File Properties** button to verify and change the data as needed, if you notice irregularities in the **Confirm Import File Properties** table.
6. Click the **Hide Import File Properties** to collapse the panel.
7. Click **Next**.
This displays **Step 3: Confirm Field Mappings**.
The table in this page displays all the fields in the module that can be mapped to the data in the import file. If the file contains a header row, the columns in the file map to matching fields.
8. Check for correct mapping and modify if necessary.
9. Map to all of the required fields (indicated by an asterisk).
10. Click **Next**.
11. This displays **Step 4: Check for Possible Duplicates**.
12. Follow the instructions on this page.
Step 4 also provides the option of saving the current import file properties, mappings, and duplicate check indexes for future imports.
13. (Optionally) Save the import settings.
14. Click **Import Now**.
15. This displays **Import Results** (Created Records, Duplicates and Errors).
16. Click the **Errors** tab to check for errors in the process. Follow the instructions to fix problems (if any) and **Click Import Again**.
This displays **Step 1** of the import process.
17. Follow all the steps in the wizard through Step 5.
If the import was successful, you can to view all the imported records at Step 5.
18. Click **Undo Import** if you are not satisfied with the imported records,
Or, click **Import Again** to import more data
Or, click **Exit** to navigate to the List View page of the module that you imported your records into.

Exporting Data

You can export Sugar records in .csv format to your local machine. Use Microsoft Excel, Notepad, or other text editors to open .csv files.

The .csv file displays column titles, including the Record ID (a long string of letters and numbers used as a unique reference to each account record) and all the other fields in the module.

Note: When exporting values for drop-down list options, Sugar exports the ID associated with each option (that is, item name) and not the display labels.

To export data from Sugar

1. Select the records from the List View on the module's home page.
2. Select **Export** from the **Actions** drop-down menu in the List View.

To export all records listed on the page, click **Select** located above the item list and select one of the following options:

This Page. To export all the records listed on the page, select this option.

All Records. To export all records on the list (if it is more than a page long), select this option.

This displays an **Opening.csv** dialog box.

3. Select **Open** to open the export file in .csv format or select **Save to Disk** to save the .csv file to your local machine.
4. Click **OK** to execute the operation. If you chose to open the file, the csv file opens in Microsoft Excel.

The file contains all the fields in the module from which you are exporting the data.

Administering Sugar

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

Topics include:

- [Configuring Settings in Sugar](#)
- [Users](#)
- [Sugar Connect](#)
- [System](#)
- [Email](#)
- [Developer Tools](#)
- [Bug Tracker](#)
- [Employee Records](#)
- [Advanced Configuration Options](#)

A Sugar user can be a System Administrator, or a user with or without module-specific administration or developer privileges.

A System Administrator is a user who has access to all Sugar records and full control over administering and developing the application.

Module administration privileges allow users to have administrator access to records or to have control over the customization and administration of the modules. The System Administrator can grant this type of access to a user to allow the individual to manage a specific module. For more information, see [Role Management](#).

When you log into Sugar as an administrator, the **Admin** link displays on the top right corner of your page. Click this link to view the Administration page. The Administration page displays sections that group tasks according to the area of administration.

Configuring Settings in Sugar

The **Admin Wizard** displays when you log into Sugar for the first time after installation. This wizard guides you through the process of branding, localizing, and configuring email settings in Sugar that will be applicable to all users in your organization. You can skip this step if you prefer to do it at a later time.

To specify system-wide settings

1. Click **Next** on the **Welcome to Sugar** screen to view the **Branding** screen.
The Sugar logo, which is the default, displays as the current logo.
2. Enter the following information:
Name. Enter the name that you want displayed in the title bar of your browser.
Select Logo. Specify the image file, in .png or .jpg format, containing your organization's logo. Click **Browse** to navigate to the file's location and upload it. The recommended size of the logo is 212x40 pixels.
3. Click **Next** to view the **System Locale Settings** page.
4. Specify the default settings for displaying data format, such as time, date, and currency. To change the default language in Sugar for all users in your organization, select the language pack from the Language drop-down list.
5. Click **Next** to view the **SMTP Server Specification** page.
6. Specify the email account to send emails to Sugar users regarding assignment notifications and new user passwords.
 - o To use Gmail, click **Gmail**, and enter the email address and password.
 - o To use Yahoo, click **Yahoo**, and enter the email address and password.
 - o To use Microsoft Exchange, click **Exchange**, and enter the server name and port number. To enter SMTP over SSL or TLS, select the appropriate option from the drop-down list. Optionally, to use SMTP authentication, enter the Exchange username and password.
 - o If you are not using any of the above, click **Other**, and enter the name of the SMTP server, and optionally, enter the appropriate username and password for SMTP authentication.
7. To ensure that you can successfully send emails, click **Send Test Email** and check if the test email was received at the specified email address.
8. Click **Next**.
To exit the screen and begin using Sugar, click **Finish**. This displays your Home page in Sugar.
9. To configure your user preferences, click **Continue**. For information on configuring User Preferences, see [Accessing Sugar and setting your User Preferences](#).
10. To view options to perform other administrative functions such as creating users and teams, click the **Admin** link on the top right corner of your page to go to the Administration page.
The tasks that you can perform from this page are described below.

Users

This section describes how to manage users and roles.

- [User Management](#)

- [Role Management](#)
- [Password Management](#)

User Management

Use the User Management option to create, edit, activate, and deactivate users in Sugar. You can create a Regular User, a System Administrator, and a Group User.

A Regular user can access and use Sugar modules but does not have administrative privileges.

A System Administrator is a user who has administrative privileges in Sugar to perform tasks such as creating users. The System Administrator can access all modules and records. Role restrictions, discussed later in this chapter, do not apply to System Administrators.

A Group User is a bucket that is used for inbound emails, and does not count toward the number of Sugar licenses that you purchase for your organization. For example, creating a group mail account for Support creates a group user named **Support** to handle customer support issues. Users can distribute the emails to other users from the group inbox. You can create a group user from the Users Home page or when you create a group for incoming emails as described in [Inbound Email](#).

The user name displays in the list on the Users Home page and the employees list on the Employees Home page after you create a Regular user or an Administrator. Group user names display in the Users list but not in the employees list.

You can assign users to roles depending on the tasks they perform for the organization.

To create a regular user or an administrator user

1. Click **User Management** in the **Users** panel of the **Administration Home** page.
This displays the **Users Home** page.
2. Select **Create New User** from the **Actions** bar on the **Users** tab, and enter the following information under **User Profile**:
 - a. In the **User Profile** section, enter the user's name, user type, and current status. If you do not select a user type, the system creates a Regular user.
 - b. In the **Employee Information** section, specify information such as the user's current status, title, department, phone numbers, IM (Instant Messenger) type, and home address. You can add additional comments in the Notes field.
 - c. In the **Email Settings** section, you can set one or more email addresses for the user's mail accounts. You can further specify whether an email address is the user's primary email address or whether it will be used for an automated response to email. You can also specify an email client from the drop-down list, and specify the user's account information for the pre-configured email provider. For more information on setting up and configuring emails, see [Configuring Email Settings](#).
3. If the system-generated password feature is not enabled, you can create a password on the Password tab. You can manually send the password to the user along with the username. Alternatively, you can enable the system to generate a

temporary password automatically and email it to the user. For more information on system-generated passwords, see [Password Management](#). The user will need a username and password to log into Sugar and change the password on the User Preferences page.

4. On the **Advanced** tab, you can specify default system settings, such as locale settings, as described in [Editing your User Preferences](#).
5. On the **Access** tab in the Detail View, you can add or remove a role to change the user's access permissions for a Sugar module, and to perform specific actions, such as editing and deleting records within the module. You can enable or disable access to any Sugar module and to any action within a module. By default, the user has permissions to access any module and perform any action.

Scroll down the Access page, and in the Roles section, click **Select** to assign the user a role from the Roles list. For information on creating roles, see [Role Management](#).

6. To create the user, click **Save**.

Sugar creates the User record, and a corresponding Employee record. You can now assign the user to roles.

To assign roles to a user

1. Select the user from the **Users** list.
This displays the user's Detail View page.
2. To assign a role to the user, scroll down the page, click **Select** in the **Roles** section and select one or more roles that you want to assign to the user.
The user is assigned to the role, which is now listed in the **Roles** sub-panel.

To manage user information

- To update the status of some or all users, select multiple records in the Users List View, and click **Mass Update** in the **Actions** drop-down list. For more information, see [Editing and Deleting Multiple Records](#).
- To view a user's details, click the name in the Users list.
- To edit user details, click **Edit** on the user's Detail View page, change the information as needed, and click **Save**.
- To duplicate the user details, click **Duplicate** on the user's Detail View page, edit the information as necessary, and click **Save**. The following field values cannot be duplicated: **Publish key**, **Layout options**, **Email addresses**, **User Preferences**, and **Locale settings**.
- To import user data, click **Import Users** from the **Actions** bar on the **Users** tab and follow the steps listed in the Import Wizard.
- To reset to the default values for User preferences, Homepage, or Dashboard, click the appropriate button in the Detail View.

To delete a user

1. Click the user's record in the List View.

This displays the user's Detail View page.

2. Click **Delete**.

Sugar displays a message alerting you that corresponding employee record will also be deleted.

To create a Group User

1. Select **Create Group User** from the **Actions** bar on the **Users** tab.
2. Enter a username for the Group User in the **User Name** field. For example, you can enter **Support Queue** for the Support team.
3. In the **Status** field, select **Active** to indicate the Group User is being used; or else, select **Inactive**.
4. In the **Email Settings** section, set one or more email addresses for the user's mail accounts. You can further specify whether an email address is the primary email address or whether it will be used for an automated response to emails.
5. Click **Save** to create the user; click **Cancel** to exit the page without creating the user.

Role Management

Roles control user actions on records. A role defines a set of permissions to perform actions such as viewing, editing, and deleting information. You can control user actions by using roles to restrict access to modules and to limit the actions that a user can perform in Sugar.

System Administrators cannot be restricted with roles, and they can access any module and perform any action.

Users are affected by a role only if they are assigned to it. That is, users who are not assigned a role can, by default, access and take any action in any module. Users can have multiple roles assigned to them, and a role can be assigned to multiple users.

Some examples are:

- You can assign engineers in your organization to a role that prevents access to the Opportunities module.
- You can assign junior sales representatives to a role that allows them to edit opportunities, accounts, and contacts, but not delete them.

Creating Roles

When you create a role, you specify whether access is permitted or not, the modules that the role can access and the actions that they can perform.

When a user is assigned multiple roles, the more restrictive settings prevail. For example, if a user is assigned to two roles pertaining to a module where one role grants administrator access and the other grants Regular User access, then the user has only Regular User access because it is more restrictive.

Not Set: A special case is the **Not Set** value in a role definition. You can use this setting to ensure that a role does not affect a particular setting. This allows simple roles to be constructed and then combined to achieve the desired security level.

When new roles are created, the default value of Access, User Type, and Operations is **Not Set**. The default value of Not Set applies a permission to each role option as follows:

Access: Not Set = Enabled

User Type: Not Set = Normal

Action (Delete, Edit, etc): Not Set = All

When you create a role, you specify the following permissions for each Sugar module:

Access: This setting specifies which modules the role is permitted to access. Options are as follows:

- **Not Set:** Ensures that the role does not affect a particular setting. This is the default setting for new roles.
- **Enabled:** Permits the user to view the module.
- **Disabled:** Hides the module from the user's view.

Actions: This setting lists the following actions:

- **Delete:** Grants permission to delete records in the module. If **None** is selected, the **Delete** button is disabled on the Detail View page.
- **Edit:** Grants permission to edit records in the module. If **None** is selected, the **Edit** button is disabled on the Detail View page. Additionally, the user cannot use the **Mass Update** panel to update records for the module.
- **Export:** Grants permission to export record data in the module. The **Export** link located at the top of List View page is removed when this privilege is not available to the user.
- **Import:** Grants permission to import record data in the module. The **Import** link in the navigation bar does not appear when this privilege is not available.
- **List:** Grants permission to access the List View pages in the module.
- **View:** Grants permission to view records in the module.

You can specify who can perform each of the above actions. Options are as follows:

- **All:** All users who are assigned to the role can perform the action
- **Owner:** The person who created the record can perform the action
- **None:** Nobody can perform the action
- **Not Set:** Ensures that the role does not affect a particular setting

To create a role

1. Click the Role Management link in the Users section of the Administration page.
This displays the Roles List View page.
2. Click the **Create Roles** List View page.
This displays the **Roles >> Create** page.

3. Enter a name and description for the role.
4. Click **Save**.

This displays the Detail View page of the role with a list of available modules along with the action type.
5. To specify access to a module, double-click the **Access** field corresponding to that module, and select the desired option from the drop-down list.
6. To specify who can perform a specific action, double-click the action field and select the desired option from the drop-down list.
7. Click **Save**.

To assign users to a role

1. Scroll down to the **Users** sub-panel in the role's Detail View page and click **Select**.
2. Select users from the **Users** list.

The system assigns the selected users to the role and displays the username in the Users sub-panel of the **Roles** page. Alternatively, you can also assign users to a role in the **User Preferences** sub-panel of the User Management page. Role restrictions do not apply to Admin users.
3. Click **Save**.

To manage roles

- To view the role details, click the role name on the **Roles** List View page.
- To edit the name of the role and its description, on the Detail View page, click **Edit**, revise the information, and click **Save**.
- To edit the access rights of a role (for example Mass Update) per module, follow the steps listed below:
 - a. Go to the Role's Detail View page.

The Role's Detail View page displays its access control information, per module.
 - b. Double-click on a cell.
 - c. Select a value from the drop-down list in the cell.
 - d. Click **Save**.
- To duplicate the access control information, on the Detail View page, click **Duplicate**, enter a new name for the role, and then click **Save**. Note that the users list associated with the role is not duplicated.
- To delete the role, click **Delete** on the Detail View page.
- To remove a user, click the Remove (**rem**) icon corresponding to the user name in the **Users** sub-panel.

To view roles for a user

Follow the steps listed below to view access permissions for a specific user:

1. Click **List Roles by User** on the **Actions** bar on the **Roles** tab.
2. Select the user from the drop-down list.

This displays the details of the user's privileges for each module. The restrictions are then merged and the more restrictive settings across all roles are assigned to the user. You cannot change any of the privileges because they are associated with the role.

Password Management

As a System Administrator, you can use the Password Management section to create and manage passwords that apply to all users in your organization.

You can enable the System-Generated Password option to generate and send temporary passwords automatically to new users when you create a record for them. Users can log into Sugar with this password and create a new password for themselves on the User Preferences page. If you do not enable this option, you will need to create the password manually and provide it to the user.

You can create and manage templates to send system-generated passwords and links to reset passwords. Sugar provides default email templates to send system-generated passwords and links to reset user-generated passwords. You can view these two templates when you select Email Templates from the **Emails Actions** bar. Sugar uses these templates, unless you specify a custom template. For more information on creating and editing email templates, see [Creating Email Templates](#).

Sugar also provides an option to display the **Forgot Password** link in the Sugar Login window. Users who forget their passwords can click this link to submit their request for a new password. When Sugar receives such a request, it automatically sends a link to a page where the user can create a new password.

For security purposes, you can set an expiration date for system-generated passwords.

Enabling Authentication in Sugar

LDAP Authentication. You can enable authentication in Sugar if your organization has implemented Lightweight Directory Access Protocol (LDAP) or Active Directory authentication. When users in your system attempt to log into Sugar, the application authenticates them against your LDAP directory or Active Directory. If authentication is successful, the user is allowed to log into Sugar. You need to specify the encryption key for the system and forward it to your users if you are using LDAP with SOAP.

SAML Authentication. If your organization has implemented Security Assertion Markup Language (SAML) for single sign-on, you can enable it in Sugar.

Note: Settings for Sugar password requirements, password reset, and password expiration are not applicable when LDAP authentication or SAML authentication is enabled.

To specify and manage password settings

1. Click **Password Management** in the Users sub-panel of the Administration Home page.

This displays the Password Management page.

2. You can specify the following information:

System-generated passwords

You can enable Sugar to email a system-generated link to users who need to reset their passwords in this section. Ensure that you have configured an email server for outbound emails on the **Email Settings** page, and that you have valid email addresses for all your users.

For security reasons, you can set an expiration date for system-generated passwords. You can specify a time period or the number of logins after which the password expires. To specify a time period, select **Password Expires in** and enter the time period in days, weeks, or months. To specify the number of logins, select **Password Expires upon** and enter the number of logins.

User Reset Password

You can configure settings to enable users to reset their passwords using the **Forgot Password** link that displays in the Login Window in this section. By default this link is disabled for LDAP authentication purposes.

Enable Forgot Password Feature. This option, which is enabled by default, enables users who forgot their passwords to use the Forgot Password link on the Login window to submit their user name and email address to Sugar. The system automatically sends them an email with a link to the page where they can reset their password.

Generated Link Expiration. Use this option to specify whether the Forgot Password link expires or not. Select **None** if you do not want the link to expire. Or else, select **Link Expires in** and enter the time period in minutes, hours, or days, when the link remains active.

Enable reCAPTCHA Validation. You can select this option only when the Enable Forgot Password feature option is enabled. When you enable reCAPTCHA validation, the **Public key** and **Private key** fields display below. Enter the Public key and the Private key that you received from reCAPTCHA for your Sugar instance in the appropriate fields.

Email Templates

In this section, you can create message templates to use when sending out generated passwords and links to reset passwords.

Email template containing system-generated password. To create an email template for system-generated passwords, select **System-generated password email** from the drop-down list and click **Create**.

Email template containing system-generated link to reset password. To create an email template to send a link to users who forgot their passwords, select **Forgot Password email** from the drop-down list, and click **Create**.

Sugar creates the template and displays it in the Email Templates Home page. On the Emails tab, select Email Templates from the **Actions** bar to view available email templates.

Note: If you choose to create your own templates to send passwords, copy the password variable provided in the default template, named System-generated password email, into your email template. The password variable is not available in the Insert Variable drop-down list of the Email Template form.

LDAP Support.

You can enable LDAP authentication in this section. If you are using LDAP authentication, you must disable the **Forgot Password** option.

To enable LDAP authentication, select the **Enable LDAP** box, and enter the following information in the fields below:

Server. Enter the LDAP server name.

Port Number. Enter the server's port number.

User DN. Enter the user DN name; for example, ou=people, dc=example, dc=com.

User Filter. Enter any additional parameters to apply when authenticating users. For example, is_user_id=1.

Bind Attribute. Enter the attribute name that is used to bind the user's name in LDAP. For example, in openLDAP, the attribute name is userPrincipleName.

Login Attribute. Enter the attribute name that is used to search for the user in LDAP. For example, in openLDAP, the attribute name is dn.

Group Membership. Select this checkbox if you wish to specify that the user is a member of a specific group, and enter the following information:

Group DN. Enter the group DN name; for example, ou=groups, dc=example, dc=com.

Group Name. Enter the group name; for example, cn=sugarcrm.

User Attribute. A unique identifier used to check if the user is a member of the group. For example, uid.

Group Attribute. The attribute of the group that will be used to filter against the User Attribute. For example, MemberUid.

Authentication. Select this checkbox to use specific user credentials to bind to the LDAP server, and enter the user name and password in the fields that display below.

Auto Create Users. Select this checkbox to create the user name in the Sugar database if it does not already exist.

Encryption Key. If you are using LDAP with SOAP, enter the encryption key to encrypt user passwords in the Sugar Plug-in for Microsoft Outlook. The `php_mcrypt` extension must be enabled in the `php.ini` file.

SAML Authentication.

Use this section to enable SAML authentication. You must disable the **Forgot Password** option if you are using SAML authentication.

Select the **Enable SAML Authentication** checkbox and enter the following information:

Login URL: Enter the SAML URL for authentication. This is the path to the SAML server you are authenticating to.

X509 Certificate: Enter the SAML X.509 certificate public key.

3. Click **Save**.

Sugar Connect

This section includes the following options:

- [Sugar Support Portal](#)
- [Sugar Updates](#)
- [Online Documentation](#)

Sugar Support Portal

Use this option to access the SugarCRM forums, search FAQs (Frequently Asked Questions), download the latest Sugar version, buy network subscription, log into the network, file bugs, research reported bugs, and request new features.

The SugarCRM forums cover discussions on a broad range of topics such as setting up the Sugar application and Frequently Asked Questions (FAQs) . You need to register your organization with SugarCRM to participate in the discussions. You can view postings on any of the Sugar forums without registering your organization.

Sugar Updates

Use this option to check automatically or manually for Sugar updates. By default, the option to check for updates automatically is enabled.

If you choose to check for Sugar updates automatically, you will be notified when new Sugar versions or updates are available. To perform a manual check, uncheck the **Automatically Check for Updates** option and click **Check Now**. If you already have the latest version, **You have the latest version available** message displays at the bottom of the panel.

Online Documentation

Use this option to view and download PDF copies of available documentation on installing and using the Sugar application and plug-ins.

System

This section includes the following options to configure system-wide settings that apply to all users in your organization.

- [System Settings](#)
- [Import Wizard](#)
- [Locale](#)
- [Backups](#)
- [Currencies](#)
- [Repair](#)
- [Scheduler](#)
- [Diagnostic Tool](#)
- [Themes](#)
- [Activity Streams](#)
- [Connectors](#)
- [Global Search](#)
- [Languages](#)
- [OAuth Keys](#)

System Settings

Use this option to configure the system-wide settings according to your organization's specifications. Users can override some default settings, such as the datetime format, on their User Preferences page

User Interface

Use this section to configure the user interface.

To configure the user interface

1. Configure the following fields:

Listview items per page. Enter the maximum number of records you want displayed in the list view. The system paginates lists that contain more than the specified number of records.

Prevent user customizable Homepage layout. Select this box if you want to prevent users from moving Sugar Dashlets on the Home page. However, users can still create additional Sugar Dashlets.

Maximum number of Sugar Dashlets on Homepage. Enter the maximum number of Sugar Dashlets you want displayed on the Home page. Users will not be able to add more than the number of Sugar Dashlets that you specify. The default value is 15.

Display server response times. This option is enabled by default. The footer on every page displays the time taken to respond when users attempt to perform an action, such as logging in or opening an item, in Sugar. Deselect this option if you do not want to display the response time.

System Name. This field displays your system name.

Current Logo. This field displays your organization's logo that currently displays in the User Interface.

Select Logo. Enter the path to the location of the logo that you want to upload from your local machine. Or, click **Browse** to navigate to the location of the logo on your local machine. The dimension should be 212 X 40, with the standard transparent background color, in PNG or JPG format.

Lead Conversion Options. Use this option to enable users to copy, move or do nothing with the activities related to the converted leads.

Subpanel items per page. Enter the maximum number of records you want displayed in the List View. The system paginates lists that contain more than the specified number of records.

Prevent user customizable subpanel layout. Select this box if you want to prevent users from dragging and dropping sub-panels to a different location in their Detail View layout.

Show Full Names. Select this box if you want the full name for users displayed instead of their login names.

Display module icon as favicon. Select this option if you want to display the module icon in the browser's navigation tab instead of the Sugar icon, which is the default. For example, when you are in the Accounts module, the navigation tab will display the Accounts icon.

Configure AJAX User Interface. The AJAX UI enables navigation through most of the Sugar application without requiring full page refreshes. This results in improved performance with reduced page rendering times. However, the AJAX UI cannot be applied to the following:

- Some older third party modules
- Some core modules with complex customizations

When users try to access the above modules in an AJAX UI, an error message displays, warning them of the issue with the module.

Use the **Configure AJAX User Interface** link to disable the AJAX UI for specific modules. The AJAX user interface has been disabled for the following modules by default:

- Emails
- Reports
- Users

Note: The Admin UI is not AJAX UI-enabled so that admin users can access the Admin panel and disable the AJAX UI systemwide.

2. To save the settings, click **Save**.
3. To restore the default settings, click **Restore**; to exit the page without saving your changes, click **Cancel**.

Proxy Settings

If you are using a proxy server to connect to the web, you will need to enter the information here to allow the system to check for Sugar updates.

1. Configure the following fields:

Use proxy server. If you want to connect to the web through a proxy server, select this option.

The system displays fields to specify the proxy host and port number.

Proxy Host. Enter the name of the proxy server host

Port. Enter the port number for the proxy host.

Authentication. Select this box if you want to enable proxy authentication to allow Sugar to connect to the company's proxy server.

User Name. Enter the user name.

Password. Enter a password for the user.

2. To save the settings, click **Save**; to restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

SkypeOut

Select this option to allow users to click a phone number field to make calls through Skype.

To enable Skype

1. Select the **Enable SkypeOut integration** box.
2. To save the setting, click **Save**; to restore the previous setting, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

Mail Merge

If your users have installed the Sugar Plug-in for Microsoft Word, this option allows them to perform a mail merge with Word documents. For example, you can merge contact information from Sugar with form letters created in Microsoft Word. The Mail Merge link displays at the top of a List View.

Note: Users must also select the Mail Merge option on their User Preferences page.

1. Select the **Enable mail merge** box.
2. To save the setting, click **Save**.

To restore the previous setting, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

Advanced

1. Select any of the following advanced configuration options:

Validate user IP address: For security reasons, by default, this option is enabled to validate the IP addresses of users who log into Sugar.

Note: Some high availability systems may change IP addresses for load balancing purposes. If the IP address changes during a user session, the user will be logged out, and will have to log back into Sugar.

Log slow queries. Select this option to log the system's slow responses to user queries in the *sugarcrm.log* file. This information is for performance tuning investigation.

Maximum upload size. Enter the maximum file size, in bytes, that users are allowed to upload.

Note: The upload size is also dependent on PHP's upload settings.

Log memory usage. Select this option to record memory usage in the *sugarcrm.log* file.

Slow query time threshold. Specify a threshold, in milliseconds, to define slow queries. Queries that take longer than the threshold time are logged in the *sugarcrm.log* file. This information is for performance-tuning investigation.

Display stack trace of errors. When you select this option, if an error occurs when users are running the application, the system displays where the error occurred in the application's stack trace. This information is for debugging purposes.

Developer Mode. Select this option to disable caching so that you can immediately view changes made to language, vardefs, and template files.

vCal Updates Time Period. Select this option to specify the number of months in advance of the current date that Free/Busy information for calls and meetings is published. The minimum value is one month, and the maximum value is 12 months. To turn off Free/Busy publishing, enter **0**.

2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

Logger Settings

The Sugar Logger logs events that occur in the Sugar application. By default, the logs are written to *sugarcrm.log* in the Sugar root directory. Hence, if a problem arises, you can refer to the log file for information that may help in troubleshooting it.

When you upgrade Sugar, the application parses your Logger settings automatically from the *log4.php* properties file of your previous Sugar version, and populates the Logger Settings sub-panel with the information.

You can, however, change the settings if necessary.

The logging levels are as follows:

- **debug:** Logs events that help in debugging the application.
- **info:** Logs informational messages.
- **warn:** Logs potentially harmful events.

- **error**: Logs error events in the application.
- **fatal**: Logs severe error events that leads the application to abort. This is the default level.
- **security**: Logs events that may compromise the security of the application.
- **off**: The logger will not log any events.

When you specify a logging level, the system will create log files for the specified level as well as higher levels. For example, if you specify `'Error'`, the system creates log files for `'error'`, `'fatal'`, and `'security'`.

The default size of a log file is 10 MB. Downloading large log files from the web server can be a slow process. Hence, if you view log files frequently, it is recommended that you view actions that occurred since the last entry in the current log file.

To configure logger settings

1. In the **Logger Settings** panel, enter the following information:

Log File Name. Specify a name for the log file.

Extension. Enter the file extension. The default is `.log`.

Append After File Name. From the drop-down list, select a time period to append to the file name. This makes it easier to identify the log that you want to view.

Maximum Log Size. Specify the maximum size of the log file in MegaBytes (MB). The default is 10MB.

Log Level. From the drop-down list, select the event level that you want to capture in the log file. The default is **fatal**.

Default Date Format. Enter the default date format for the log file. This format must be supported by `strftime`. The default is `%c`.

Maximum Number of Logs. Specify the maximum number of log files to save. When the number of log files exceed this limit, Sugar deletes the log file that was created first. The default is 10 logs.

Configure Log Settings. Click this link to view the Sugar log file, as described in [To configure log settings](#).

2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

To configure log settings

1. In the **Logger Settings** panel, click the **Configure Log Settings** link.
2. Select one of the following:
 - **All**. Select this option to view the entire log for the current session.
 - **Next**. Select this option to view only new entries in the log file.

- **Mark Point.** Select this option to indicate that you want to view actions that were logged after the last entry in the current log file. Then click **Refresh From Mark** to view actions that occurred since the time you clicked **Mark Point**.

For example, to debug a problem, select the **debug** logging level on the **Logger Settings** page, click **Configure Log Settings**, and then click **All** to view all user actions in the log file. To view only new user actions since the time you clicked **All**, click **Next**. This action will display only new entries in the log file. To view new user actions since the last entry in the current log file, select **Mark Point** and then click **Refresh from Mark**. This action will append new entries to the current entries in the log file.

3. To search the log by keyword, enter it in the **Search** box. To search for entries using a regular expression, enter it in the Search box, and select the **Reg Exp** box. Press **Enter** on your keyboard to begin the search.

Note: The **Ignore Self** option is not used.

Sugar displays the log entries on the screen.

Import Wizard

Use this link to easily import data into the system for selected modules without having to visit each individual module. The process of importing the data is identical to the user data import.

Follow the steps listed below to import data using the Admin Import Wizard:

1. Click the **Import Wizard** link.
2. This displays the **Step 1: Select Data Source** page.
3. Select the module you want to import data into, from the drop-down list.
4. Click Next.
5. Follow the instructions provided in the Import Wizard to complete the process.
- 6.

Locale

Use this option to set system-wide default formats for date, time, language, name, and currency. If you are using MySQL, you can also specify the collation order for records in the application.

User Interface: Use this section to set the default values in the Sugar User Interface.

Default Date Format. Select a date format for all records from this drop-down list. Users can override the default format by setting a different date format in their User Preferences page.

Default Time Format. Select a time format from this drop-down list to display in all records such as Cases. Users can override the default format by setting a different time format in their User Preferences page.

Default Language. Select the default language for the Sugar User Interface from this drop-down list.

Default Name Format. Enter the default salutation and name format to display in list views and detail views. You can specify any combination of salutation first name, and last name. For example: Mr. John Smith, Mr. Smith, or John Smith. Users can override the default format by setting a different time format in their User Preferences page.

Default Currency. Use this section to override the default currency that you set during installation. On the User Preferences page, users can override the default currency that you specify in this panel.

Currency. Enter the name of the currency that your organization uses to conduct business.

Currency symbol. Enter the symbol for the currency.

ISO 4217 Currency Code. Enter the ISO code for the currency.

1000s Separator. Specify a delimiter to separate thousands when users specify a numeric value for the amount.

Decimal Symbol. Specify a default decimal symbol.

Export Settings

Use this panel to specify export settings such as the delimiter used to separate data in export files, and the default character set used to export data from Sugar. The settings you specify here apply to all users in the organization. However, users can define a different default export character set on their User Preferences page to export data from Sugar.

This character encoding is also used when importing data into Sugar.

By default, Sugar uses UTF-8 to store and export data. For locales that use character encoding other than UTF-8, you must specify the appropriate default character set. This ensures that the character set Sugar uses to create the exported file is mapped to the correct character set on the user's machine. For example, MS Windows uses SJIS in Japan. So, for users in this locale, you will need to select SJIS as the default export character set.

By default, both users and administrators can export files from Sugar. However, you can prevent users from exporting files.

Export Delimiter. Specify the delimiter, such as a comma or a period, to use while exporting data.

Default Character Set for Import and Export. The default is UTF-8. For locales other than US and Western Europe, select the appropriate character set from the drop-down list.

Disable export. Select this option if you want to prevent end users and users with administrative privileges from exporting data.

Admin export only. Select this option to allow only users with administrative privileges to export data.

Database Collation

Sugar displays this sub-panel only if you are using the MySQL database. This setting manages the connection layer between SugarCRM and your MySQL database, and should be set to match the collation of your database tables. You can select the desired collation order from the drop-down list. The default is `utf8_general_ci`. Changing this setting will not alter your existing tables, and all new tables created after this change will inherit the **collation setting** name.

CAUTION: The database will return errors if you run queries against multiple tables, and if tables in the query have a different collation.

To save the settings, click **Save**; to exit the page without saving your changes, click **Cancel**.

Backups

Use this option to backup the Sugar configuration files. Note that this option does not backup the database.

To backup Sugar configuration files

1. Click the **Backups** option in the **System** sub-panel on the **Admin** page.
2. In the **Directory** field, specify a directory that is writable by the same user as the Apache process.
3. In the **Filename** field, enter a file name for the zip file including the `.zip` extension.
4. To ensure that backup can be performed, click **Confirm Settings**.
5. Click **Run Backup** to create the `.zip` file of your Sugar application files.

Note: To backup your database information, refer to your database vendor's documentation.

Currencies

Use this option to define a new currency and rate.

For each new currency that you define, enter the name, symbol (for example, \$), conversion rate to the US \$, the currency code (such as CDN for the Canadian dollar). Set the **Status** to **Inactive** if you do not want users to use this currency for transactions.

Note: To display the Euro symbol in charts, you will need to install Macromedia Flash8.

Repair

Use this option to upgrade and rebuild data from a previous version of Sugar for the current version of the program.

The options are listed below.

Quick Repair and Rebuild: Repairs and rebuilds the database, extensions, vardefs, Sugar Dashlets, and so on for selected modules. Click this option, select the modules you want to repair, and click **Repair**. You also use this option to clear any custom My Activity Stream link types from the cache.

Expand Column Width. Expands certain char, varchar, and text columns in MSSQL database.

Rebuild .htaccess file: Rebuilds the *.htaccess* file to limit access to certain files directly.

Rebuild Config File: Rebuilds the *config.php* file by updating the version and adding defaults when not explicitly declared. Click this option to check the file and, if necessary, click **Rebuild**.

Rebuild Extensions: Rebuilds extensions including extended vardefs, language packs, menus, and administration

Rebuild Relationships: Rebuilds relationship metadata and drops the cache file.

Rebuild Schedulers: Rebuilds your default Scheduler Jobs. Click this option and then click **Rebuild**.

Rebuild Sugar Dashlets: Rebuilds the cache file for Sugar Dashlets.

Rebuild Javascript Languages: Rebuilds Javascript versions of language files.

Rebuild JS Compressed Files: Copies original Full JS Source files and replaces existing compressed JS files.

Rebuild JS Grouping Files: Re-concatenates and overwrites existing group files with latest versions of group files.

Rebuild Minified JS Files: Copies original Full JS Source Files and minifies them, then replaces existing compressed files.

Repair JS Files: Compresses Existing JS files - includes any changes made, but does not overwrite original JS Source files.

Repair Non-Lowercased Fields: Repairs mixed-case custom tables and metadata files to fix issues where code expects lowercase field names.

Repair Roles: Repairs roles by adding all new modules that support access control as well as any new access controls to existing modules.

Repair Inbound Email Accounts: Repairs Inbound Email accounts and encrypts account passwords.

Remove XSS: Removes XSS Vulnerabilities from the database. Click this option, select a module, and click Execute. If any XSS strings are found, the system lists them in the **Object(s) found** field below.

Repair Database: This option is applicable to MYSQL databases only. It repairs your Sugar database based on values defined in the vardefs. You can choose to display the SQL that will be executed on the screen, export it, or execute it.

Repair Activities: Repairs Activities (Calls, Meetings) end dates.

Enable/Disable Seed Users: Enables or disables seed users populated during demo installation. Click this option, and if the seed users are enabled, click **Deactivate** to disable them. If the seed users are disabled, click **Activate** to enable them.

Scheduler

Use the Scheduler to ensure timely execution of custom processes such as workflows and email campaigns. You can schedule jobs such as monitoring inbound emails and dispatching campaign emails.

The Scheduler integrates with external UNIX systems and Windows systems to run jobs that are scheduled through those systems.

You can schedule the following types of job:

Prune Tracker Tables. This job removes entries from the tracker and tracker_sessions database tables after 30 days.

Check Inbound Mailboxes. This job monitors inbound emails in active mail accounts that you set up using the Inbound Email option in the Email panel of the Admin page.

Run Nightly Process Bounced Campaign Emails. This job polls any mail account in which, the **Possible Actions** parameter is set to **Bounce Handling**. This is an essential component of monitoring mass email campaigns.

Run Nightly Mass Email Campaigns. This job processes the outbound email queue for your organization's mass campaign emails.

Prune Database on 1st of Month. This job reads all the tables in your Sugar database, finds records that have been soft-deleted (deleted = 1), creates a large SQL file, and physically deletes those records on the 1st of every month. It is mostly a performance job, and is not essential to the use of Sugar. The backup files are placed in *cache/backups* with time-stamped filenames.

Configuring Settings for Scheduler Jobs

For Microsoft Windows, you can use the Task Scheduler. For UNIX and Linux systems, you will need to add a new cron job to the crontab.

To add a new cron job to your crontab for Unix and Linux Systems

1. At the command prompt, type `crontab -e`.
2. Add the following line to your crontab using the full path to the PHP directory in your Sugar installation:

```
* * * * * cd /path/to/sugar; /path/to/php -c/path/to/php.ini -f cron.php /dev/null 2>&1
```

where:

path/to/sugar is the path to where your Sugar installation resides.

path/to/php is the path to the PHP installation that you want to use.

path/to/php.ini is the path to the PHP configuration file that you want to use.

3. Save your changes and close.

If you encounter problems, do the following:

1. Determine the user ID that Apache server uses to run.

In a properly configured virtual host environment provided by your host, Apache will run as your Login User ID for files in your virtual directory. If you are unsure, contact the Customer Service department for your host.

- a. Search for a file named *httpd.conf*. Typically, this file is located in the */etc* folder. It will vary with the distribution.
- b. Open the file using a text editor and locate the line that starts with “User”. The name that follows it directly is the name of the user that Apache will run as on your system.

2. Determine the capabilities of your PHP installation.

The Sugar Scheduler is designed to work with PHP and its extensions; specifically, the database Connector, the IMAP libraries, and the cURL libraries.

Ensure that the PHP binary (php-cli or just php) is available and has those libraries available.

Search for the PHP binary as follows:

- a. Type `which php`. On most correctly configured PHP installations, you will find the binary in */usr/bin* or */usr/local/bin*. If so, move on to Step number 3.
Or
- b. Type `find / -name php`. Typically, this command will return a long list. Parse through the list to find an executable file named *php*.
- c. If you cannot find the PHP binary, scroll down to the *Troubleshooting Tips* at the end of this section and read item number 2.

3. Create a cron job for the Apache user

- a. Type `crontab -e -u [the Apache user]`.
- b. Enter the following line to your crontab:

```
* * * * * cd /path/to/sugar; php -f cron.php > /dev/null 2>&
```
- c. To fine-tune this job, change the first two ***s**. The first is the **Minutes** value, the second is the **Hours** value.

For example, to run the cron job every three minutes, enter:

```
"*/3 * * * * cd /path/to/sugar; php -f cron.php> /dev/null 2>&1
```

4. Test the crontab line as follows to confirm that your system is ready to run:

- a. At a terminal prompt, copy and paste the command for your cron job, and run it; the logic here is that if the command will execute successfully when run manually, the crontab will be able to execute successfully as well.
- b. If your cron job looks as follows:

```
* * * * * cd /var/www/html/sugarcrm; path/to/php -f cron.php > /dev/null 2>&1
```

Enter the command from "cd.." to "2>&1" into a terminal and press **Enter**.
- c. If any errors occur, refer to [Troubleshooting Tips](#).

5. Save your changes and close.

To add a new cron job to your crontab for Microsoft Windows (2000, XP, Server)

Set up the Windows batch file as follows:

1. Create a batch file that will execute all the necessary commands.
2. Enter the following paths in the batch file:
 - o `cd c:\path\to\Sugarinstance`
where *SugarInstance* is your Sugar installation.
This folder should contain the *cron.php* file.
 - o `c:\path\to\php.exe -c c:\windows\php.ini -f cron.php`
3. Run the batch file from a command prompt to ensure that the output has no errors.
4. If you encounter problems, do the following:
 - a. Determine the PHP binary to use for PHP 5.2.x.
For the 5.2x version of PHP, the PHP-CGI binary is named *php-cgi.exe* (not *php-cli.exe*) and is typically located in the root folder of your PHP install folder. To allow it to interact with the dynamic libraries, specify the location of the *php.ini* file. This can vary from system to system. If you are unsure, enter the command described above.
The system will identify the *php.ini* file and its location.
5. Create the batch file.
 - a. Click **Scheduler** in the Systems panel of the **Admin** page.
At the bottom of the default screen, you will see the contents of the commands you need to add to a batch file.
 - b. Open *notepad.exe*, copy and paste what Sugar's recommendation into a blank file.
 - c. Change the Save As Type to "dropdown to All Files *.*. " and save it as a .bat file.

Note: This is only a recommendation. It may not work for your particular instance. Check the folder paths because they are often the cause for problems with the Scheduler.

6. Test the batch file.
 - a. From the command prompt, navigate to the folder where you saved the batch file.
 - b. Enter the full name of the batch file to execute it.
 - c. Note and correct any reported errors, usually related to paths that cannot be found.
7. Create a scheduled task.
 - a. Click **Start** and navigate to Control Panel/Scheduled Tasks/Add Scheduled Task.
 - b. Go through the Wizard, browse to the batch file you just created, and select it.

- c. Schedule a daily job, and ensure that you select **Open advanced properties for this task when I click finish**.
 - d. On the Advanced Properties page, navigate to the **Schedule** tab, and click **Advanced**.
 - e. Check off **Repeat task** to enable the fields below it, and select **Every Minute** or specify the interval you think is appropriate.
8. Save your changes and close the Wizard.

To schedule a job

1. On the **Scheduler Actions** bar, click **Create Scheduler**.
2. In the Basic Setup sub-panel, enter the following information:
 - Job Name**. Enter a name for the job.
 - Status**. From the drop-down list, select **Active** to run the job at the specified intervals; select **Inactive** if you want to save the job schedule information but not run the job.
 - Job**. Select a job from the drop-down list, or to run a script from a web server, enter the URL in the adjacent field.
 - Interval**. Specify the time interval to check for new scheduled jobs.

By default, Sugar displays the basic option. Use this option to specify the time interval in minutes and hours. The default is every one minute daily.

To define a specific time, click the **Show Advanced options** link, and enter the time in minutes, hours, date, month, and day.
3. In the **Advanced Options** sub-panel displays below, enter information for the following fields:
 - Execute If Missed**. Select this box to run any jobs that the scheduler missed.
 - Date & Time Start**. Click the **Calendar** icon and select the start date for the job; select the time, in hours and minutes, from the adjacent drop-down list.
 - Date & Time End**. Click the **Calendar** icon and select the end date for the job; select the time, in hours and minutes, from the adjacent drop-down list.
 - Active From**. From the drop-down list, select the time, in hours and minutes, when the job becomes active.
 - Active To**. From the drop-down list, select the time, in hours and minutes, when the job becomes inactive.
4. Click **Save** to create the job; click **Cancel** to exit the page without creating the job.
5. To export one or more scheduler definitions in a .csv file format to a local machine, select them from the list and click **Export**.

To manage scheduled jobs

1. Navigate to the **System** sub-panel on the **Admin** page, and click **Scheduler**.

Sugar displays the **Schedule List** page on the screen.

2. Select any job from the job list to view its settings or the Job log. You can edit, duplicate, or delete the settings. You can also delete a job by clicking the **del** icon corresponding to the job in the Schedule list.
3. To edit the settings, click **Edit**.
4. Make the necessary changes and click **Save** to update the settings; click **Cancel** to exit the page without saving your changes.

Troubleshooting Tips

Linux

1. The Sugar Scheduler fails to run even though the *cron.log* file shows that the crontab is triggering the new job.
 - o The Apache user's PATH does not include the location of the PHP binary.
 - Change the crontab entry to include the FULL path to the PHP binary as shown below:
 - o The Apache user's PATH does not include the location of the *php.ini* file, and thus the external libraries (such as *mod_mysql* and *mod_imap*) are unavailable at run time.
 - Change the crontab entry to include a PHP switch to explicitly define a *php.ini* to use as shown below.
2. No PHP binary found or it is broken.
 - o Change the mechanism by which your cron job calls Sugar's *cron.php*.
 - Determine if this is an option at this time by finding either **curl** or **wget** on your system. This is done with the commands **which curl** and **which wget**.

If you use *cURL*, your crontab entry should look as follows:

```
* * * * * curl --silent http://Domain/  
sugarInstance/cron.php
```

where *Domain* is the website where your Sugar installation resides, and *sugarInstance* is your Sugar installation.

If you use *wget*, your crontab entry should look like:

```
* * * * * wget -q http://Domain/sugarInstance/  
cron.php
```

Note: Both *curl* and *wget* have numerous switches that do not always map to different versions on different platforms. Experiment in the terminal until you find the perfect line, and add it as the line for your crontab entry.

Windows.

1. The most common problem is that the PHP binary does not have the proper libraries available at run time. As a result, it cannot make calls to your database or

to your Email server. To force PHP to be aware of these libraries, it needs to access the *php.ini* file, which in turn tells it where to find everything that is available.

- a. Locate the *php.ini* file: if you are unsure, run the following command:

```
phpinfo();
```

The system identifies the *php.ini* file and its location.

2. The second most common breakage is incorrect paths to the extensions that PHP needs; a map is useless if the information is bad.
 - a. Open *php.ini* in your favorite text editor.
 - b. Find the section named **Paths and Directories**.
 - c. The relevant entry is `extension_dir`.
 - d. Keeping in mind that this file piggybacks on Window's \$PATH\$ variable, double-check the paths listed.
 - e. Correct any errors - sometimes giving an absolute path solves hard-to-diagnose problems, for example, full path listing from c:\... onwards.
Necessary extensions are disabled.
 - f. Open your *php.ini* file in a text editor.
 - g. Find the section named **Dynamic Extensions**.
 - h. Scroll down to the Windows-specific list.
 - i. Make sure that the necessary extensions are uncommented (no “;” preceding the line). The bare minimum for Sugar Scheduler to run is to have `php_curl`, your database Connector, typically `php_mysql` (for PHP5), and `php_imap`.
 - j. Test the batch file again.

Diagnostic Tool

Use this option to capture system configuration for diagnostics and analysis. The diagnostic tool pulls up system information and stores it in a zip file on the server for download. This file summarizes the basic information required to resolve the problem. Attach this file to the help request you sent to Customer Support.

To capture system configuration

1. On the **Diagnostic Tool** page, click **Execute Diagnostic** to run the tool.

The system displays a list of system configuration files. By default, the system captures configuration information for all the selected files.

The system performs the following actions of these files:

SugarCRM Config.php - Copies the *config.php* file from the root directory after replacing the DB password with an asterisk for security purposes.

SugarCRM Custom directory - Copies the custom directory to a zip file to enable Customer Support to know what has been customized through the Layout Editor.

phpinfo() - Executes `phpinfo` and stores it in a file.

MySQL - Configuration Table Dumps - copies a few tables from the database and replaces sensitive information with an asterisk for security purposes.

MySQL - All Tables Schema - writes the schema for all tables to an HTML file.

MySQL - General Information - Pulls up some general information, like MySQL version, character sets, etc.

MD5 info - Runs md5 checks on all files in the sugar directory and compares it against a stock Sugar installation's md5s. This enables Customer Support to learn which, if any, files have been manually customized.

BeanList/BeanFiles files exist - If a custom module has been loaded, and the author did not define these references correctly, it can cause problems. This action checks all the references to ensure they are correct.

SugarCRM Log file - copies the log file.

Sugar schema output (VARDEFS) - copies the Sugar database schema.

2. Deselect the ones you do not want to view, and then click **Execute Diagnostic**.
The system creates a zip file that contains the captured configuration information.
3. To view the file, click the **Download the Diagnostic file** link at the bottom of the page; to delete the file, click the **Delete the Diagnostic file** link.
4. If you choose to download the file, the **File Download** dialog box displays on the page. To view its contents, click **Open**, and click the file you want to view. To save the zip file contents, click **Save**, and select a location on your local machine.

Themes

Use this option to manage Sugar themes for your organization. You can enable or disable a theme. Sugar displays only enabled themes in the **Theme** drop-down list from which users make their selection. By default, all themes are available to users. For Community Edition, the Classic theme is the only available theme.

Activity Streams

Sugar Feed has been renamed My Activity Stream in Sugar Release 6.2.0. Select this option to enable the My Activity Stream functionality for your organization. My Activity Stream enables users to be informed as soon as any user creates a new Contact, Lead, Opportunity, or Case. Users are also notified of status updates when a lead is converted, when a case is closed, and when an opportunity is closed. When a user performs any of these actions, Sugar displays a message in the My Activity Stream Dashlet on the Home page.

You can activate My Activity Stream for one or more of the following modules: Leads, Cases, Opportunities, and Contacts.

Additionally, you can enable the My Activity Stream to allow users to post status updates, external links, images, and YouTube videos. Your organization can also create custom link types.

To enable and manage My Activity Stream

1. In the System sub-panel, click **My Activity Stream Settings**.

The My Activity Stream Settings page displays on the screen. Specify the following settings.

Enable My Activity Stream. Select this option to enable this functionality for users in your organization.

Activate My Activity Stream For: To activate My Activity Stream for a module, select the checkbox appropriate for the module.

Activate My Activity Stream. Select this option to enable users to post status updates, images, links, and YouTube videos.

2. Click **Save** to save the settings. To delete all existing entries in the Activity Stream, click **Delete My Activity Stream Entries** and click **OK** to confirm your action.

My Activity Stream entries for images, links, and YouTube videos are automatically deleted after two weeks. If you add custom link types, you can clear them from the cache using the **Repair - Quick Repair** and **Rebuild** option.

Connectors

Use this option to manage Connectors to external data sources. Sugar provides Connectors to LinkedIn and InsideView.

Connectors are designed for company-type or person-type modules such as Accounts, Leads, and Contacts and for activity-type modules such as Meetings and Documents. You can enable all Connectors for any module, standard or custom, that is listed in Studio provided the module has a standard Detail View layout. For example, though the Knowledge Base module is listed in Studio, you cannot enable Connectors for it because it does not have a standard Detail View layout.

Note: You can enable InsideView for Accounts, Opportunities, Leads and Contacts only.

For all Connectors except InsideView, you can also map Connector fields to fields in Sugar as described later in this section. InsideView displays as a separate panel within the Detail View pages of Accounts, Opportunities, Leads and Contacts records.

Connectors are enabled by default to allow users to search external data sources for new information from within a Sugar record in the module. Users can view the external data or merge it with the existing information in the Sugar record. For example, they can update addresses and phone numbers for an account. For information on merging data, see [Integrating data from external sources](#). You can disable Connectors, if needed.

Developers in your organization can create Connectors to other data sources, and you can upload them into Sugar using the Module Loader. You can also search for other available Connectors on Sugar Forge at <http://www.sugarforge.org> and Sugar Exchange at <http://www.sugarexchange.com>.

To configure Connector properties

You do not need to configure the Connector properties for InsideView. For all other Connectors, follow the steps listed below:

1. Navigate to the **System** section of the **Administration** Home page, and click **Connectors**.
This displays the **Connector Settings** page.
2. Click **Set Connector Properties**.
The **Set Connector Properties** page displays tabs for the Connectors in Sugar. Tabs for any other Connectors that you install also display on this page.

To enable or disable modules for Connectors

1. Click **Enable Connectors** on the **Connector Settings** page.
2. Drag and drop module names from the **Disabled** to the **Enabled** column to enable Connectors like LinkedIn and InsideView, for the desired modules.
To disable modules for Connectors like LinkedIn and InsideView, drag the modules from the **Enabled** list to the **Disabled** list.
3. Click **Save**.

Mapping Connector Fields

You can map Connector fields to fields in a Sugar module to determine which fields display the pop-up window for the data source. For example, a mapped field for LinkedIn displays the LinkedIn icon. When users point the cursor at this icon, a pop-up window displays the LinkedIn data for the field.

To map Connector fields

1. On the **Connector Settings** page, click **Map Connector Fields**.
Each Connector tab displays a list of fields in the Connector and a corresponding drop-down list of fields in Connector-enabled Sugar modules.
2. To change a default mapping or to add a new mapping, select the Sugar field from the drop-down list corresponding to the field in the Connector.
3. Click **Save** to save the mappings.
Sugar uses these field mappings when merging data.

Global Search

Administrators can select the modules that users can search on when using Global Search. This includes both standard and custom modules that have been deployed in Sugar.

To Enable/Disable modules for Global Search

To enable/disable modules for Global Search, follow the steps listed below:

1. Click the **Admin** link on the top right corner of your page to go to the **Administration** page.
2. Click **Global Search** in the **System** section.
This opens the **Global Search** page.

3. Drag and drop modules between **Enabled Modules** and **Disabled Modules** to select which modules users can search on when using **Global Search**.
4. Click Save.

Languages

The default language in Sugar is US English. Administrators can install additional languages, if necessary. Language packs are available at <http://www.sugarforge.org>.

OAuth Keys

OAuth (Open Authorization) is an open standard for authorization that enables users to share their private resources such as photographs, videos, and contact lists, stored on one site with another site without divulging personal credentials such as username and password. For more information, see this [wiki article](#).

You need a pair of keys (text strings) - a public consumer key and a private consumer key - to establish an OAuth connection. A good example of a public key is the username used in websites that require login. A good example of a private key is the password required for such websites. Note that this private key is not sent, making it more secure than a password. Together, these keys identify which application connects to the service. It is your choice, as an admin, to decide how many different keys to have and whom to give them to.

Use the OAuth Key link to create the pair of keys discussed above. Send the created keys to the consumer of the API (for example, application developers) to use for establishing an OAuth connection.

Tokens

Tokens are created when the user establishes OAuth connection with the OAuth key pair. These are the connections between the Sugar user, the OAuth keys, and the permissions and enable the external application/user to access data. Tokens created for each OAuth connection are listed in the Tokens sub-panel of the corresponding OAuth Consumer Keys Detail View page.

Email

Administrators can setup and manage mail accounts for inbound and outbound emails, including campaign emails, using the following options:

- [Email Settings](#)
- [Inbound Email](#)
- [Campaign Email Settings](#)
- [Email Queue](#)

Email Settings

Use this option to configure a mail server for outbound emails, enable email notifications to users when records are assigned to them, and specify which HTML tags, such as applets and frames tags, to strip from incoming emails before displaying them in Sugar.

To configure email settings

1. In the **Email** section of the Administration page, click **Email Settings**.
2. In the **Outgoing Mail Configuration** sub-panel, enter information for the fields listed below.

To add Google's Gmail server, click **Prefill Gmail Defaults**. The system fills in the **SMTP Server** and **SMTP Port** fields with the Gmail server's address and port number respectively.

From Name. Enter the sender's name; for example, the name of your organization.

From Address. Enter the sender's email address.

3. Select your email provider, such as Gmail, Yahoo, or Exchange. If you are not using any of these, click **Other**.
4. Enter the email address and password for the specified provider.
5. **Allow users to use this account for outgoing email.** Select this option to allow all users to use the account, for which username and password were provided, to send emails using the outgoing mail server used to send system notifications and alerts. If you do not select this option, users will have to provide their own account information when using the outgoing mail server.
6. Click **Send Test Email** to check if the settings are valid. If they are not, Sugar displays an error message.
7. In the Email Options section, you can specify the following settings:

Assignment Notifications. Enable this option to send email notifications to users automatically when records are assigned to them.

Send Notifications from assigning user's email address. Select this option to send notifications from the email address of the user who is assigning a record to another user.

Delete related notes and attachments with deleted emails. When you select this option, related notes and attachments are deleted when an email is deleted.
8. In the **Email Security Settings** section, you can specify the following information:

Select Outlook Default Minimum Security Precautions. Select this option if you do not want to strip the **Style** tag, which is used by Outlook.

Toggle all options. Check this box to strip all the listed tags from emails in the Email client. To strip some of the listed tags, uncheck this box and then select individual tags to strip.

9. Click **Save** to save the settings; click **Cancel** to exit the page without saving your changes.

Inbound Email

Use this option to create and manage group mail accounts, and bounce handling accounts.

Group Mail Accounts: Allow multiple users, to view and import emails from an external mail account. When you receive emails that are addressed to your organization but not to any particular user, you can route it to a Group mail account such as *support@example.com* or *sales@example.com*. Users can subsequently distribute emails in the Group mail account to other users.

Bounce Handling Accounts. A bounce handling account stores campaign emails that bounce back to you due to incorrect email addresses. You can create a bounce handling inbox separately for each campaign, or you can create one that is common to all campaigns. The system tags every bounced campaign email with a unique identifier that enables you to identify the campaign.

Creating Cases from Emails. When you create a group mail account, you can set it up to automatically generate cases from inbound emails. The email's subject line is copied to the case's subject line and the body is copied as the case description. The email is related to the case and is listed in the History sub-panel of the case's Detail View.

Optionally, you can use the auto-reply template to automatically notify customers that you received their email. You can also to set up the template to notify them that a case has been created to resolve the issue. The Subject line of the email contains the number of the newly created case. The case number format follows the Case Macro setting that displays on the Inbound Email Home page. Sugar imports an email and associates it with a case based on the Subject line. When users send an email from the detail page of a case, the case number appears in the Subject field of the email.

The Case Macro field displays the default case macro string. To customize it, you can change CASE to a different word, but you must preserve the rest of the string.

To set up a Group mail account

1. From the **Actions** bar on the Inbound Email tab, click **New Group Mail Account**. Sugar displays the Group Mail Account page on the screen.

In the **Mail Account Information** section, enter information for the following fields:

Name. Enter the user's name, or an alternate name for the mail account.

Mail Server Address. Enter the address of the external mail server.

Mail Server Protocol. Select IMAP from this drop-down list. Additional fields display on the screen to select the folder you want to monitor, a Trash folder to store deleted emails, and a Sent folder to store copies of outgoing emails.

Monitored Folders. This field displays when you select IMAP as the protocol. By default, the system monitors the Inbox. To monitor other folders, click **Select** to view a list of available folders in the external mail account. To

select multiple folders, hold down the Shift key or the Ctrl key. After you select the folders that you want to view in Sugar, click **OK** to view them in your inbox.

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

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

Status. From the drop-down list, select **Active** to activate the Group mail account or **Inactive** to deactivate it. Users cannot view emails from a deactivated account.

User Name. Enter the username to access the mail server.

Password. Enter the user's password to access the mail server.

Mail Server Port. Enter the server port number.

Use SSL. If your mail server supports secure socket connections, selecting this box will force SSL connections when importing emails into Sugar.

2. In the **Email Handling Options** section, enter information for the following fields:

From Name. Enter the name of the person or company that will send the emails.

From Address. Enter the email address from which emails will be sent.

Reply-to Name. Enter the name to which you want replies to be addressed.

Reply-to Address. Enter the email address associated with the Reply-to name.

Allow User to Send Emails Using "From" Name and Address. Select this option if you want to enable users to use this account's **From** name and address as their **Reply To** address.

Import Emails Automatically. Select this option to create email records automatically in Sugar for all incoming emails.

Create Case from Email. Select this option to create cases automatically from inbound emails. When you select this option, you will need to specify how the emails are distributed in the **Distribution Method** field.

Distribution Method. This field displays only when you select the **Create Case** option and allows you to select **Round-Robin** or **Least-Busy**. With the Round-Robin option, the system distributes cases evenly among all users within the specified team. With the Least-Busy option, the system distributes cases to the least busy user within the team assigned to the Group folder.

New Case Auto-Reply Template. This field displays only when you select the Create Case option. You can use a **Case Reply** template to set up an automated response notifying email senders that a case has been created to resolve their issue. You can select an existing template from the drop-down list, or click **Create** to create a new template. The response contains the system-generated case number in the subject line of the email. The body of the email for which the case was created displays below the template text.

For information on creating email templates, see [Creating Email Templates](#).

Auto-Reply Template. Use this template to set up an automated response notifying email senders that you received their email. From the drop-down list,

select an existing template, or click **Create** to create a new one. If both templates are selected, Sugar will respond to the sender with the **Create Case Reply** template instead of the **Auto-Reply** template.

No Auto-reply to Domain. To exclude a domain from receiving the automatic email response, enter the domain name. It is common to specify your organization's domain to prevent auto-replies from being sent to your organization's members.

Number of Auto-responses. Set the maximum number of auto-responses to be sent to a unique email address during a period of 24 hours.

3. Optionally, click **Test Settings** to ensure that the settings are accurate.
4. Click **Save** to save the settings.

The system creates the mail account and displays its detail page.

To set up a bounce handling mail account

1. Select **New Bounce Handling Account** from the **Inbound Emails Actions** bar.
2. Enter the required information as described in [To set up a Group mail account](#).
3. Optionally, click **Test Settings** to ensure that the settings are accurate.
4. Click **Save** to save the settings.

The system creates the bounce handling account and displays its detail page.

To manage group mail accounts and bounce handling accounts

- To view the details of an account, click its name in the **Inbound Email** home page.
- To activate and deactivate multiple accounts, or change team assignments, select them in the List View and use the Mass Update panel to make the changes.
- To edit an account, click **Edit** in the Detail View, revise the information, and click **Save**.
- To duplicate an account, click **Duplicate** in the Detail View. The system creates a new mail account and displays the Edit View. Edit the details as needed and click **Save**.
- To delete a mail account, select it from the List View and click **Delete**. Alternatively, click **Delete** from the Detail View. To delete multiple group mail accounts, select them in the List View and click **Delete**.

Campaign Email Settings

You can specify settings for email campaigns from the Campaigns module. From the Administration Home page, you can change some default values, namely, the number of emails sent per batch and the location of the campaign tracking files. You can also specify whether you want to keep copies of campaign messages or not.

To configure campaigns email setup from Campaigns module

1. On the Campaigns **Actions** bar, select **Set up Email**.

The **Email Setup** section displays the default values for the following. You can enter new values, if needed:

From Name. Sugar display the name entered on the Email Settings page.

Mail Transfer Agent. Select the mail transfer protocol from the drop-down list. **SMTP** is the default protocol.

From Address. The email address for the sender.

Note: The name, address, and mail transfer agent information that display on this page reflect the default values set on the Email Settings page. Hence, any change that you make to these values reflect on the Email Settings page and not the Campaign Email Settings page that you access from the Administration Home page.

SMTP Server. Enter the name of the SMTP server.

SMTP Port. The system displays the SMTP port number.

Use SMTP Authentication. To use SMTP authentication, check this box and enter the email account username and password in the fields that display below.

Enable SMTP over SSL or TLS: Select either SSL or TLS from the drop-down list.

In the **Mass Mailing Options** section, enter the information shown below. You can also enter this information using the **Campaign Email Settings** option on the Administration Home page.

Number of emails sent per batch. Enter the maximum number of emails to send per batch.

Location of campaign tracking files. Campaign tracking files log responses from campaign targets. If you are running Sugar on an external network, select **Default** to accept the default location. However, if your Sugar instance is behind a firewall, then choose **User Defined** and specify the path to your external web server in the field below. Ensure that you create 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 point to the **index.php** file located in the root directory of your Sugar instance.

Keep copies of campaign messages. The Default is **No**. Selecting **No** will store only the template of the campaign message and the required variables to recreate the message.

Selecting **Yes** will save a copy of all email messages sent during all campaigns in the Sugar database. This takes up space in the Sugar database and slows down performance. Hence, it is strongly recommended that you use the default setting.

2. Click **Next**.

The page displays existing bounce handling mail accounts.

3. To create a bounce handling mail account, click **Create New Mail Account**.
4. Enter the mail account information as described in [To set up a Group mail account](#) and click **Next**.

The system displays a summary page that lists the specified settings.

5. Click **Save** to save the settings and create a bounce handling inbox; to navigate back to the previous screen, click **Back**; to go back to the **Campaigns Home** page without saving any of the specified information, click **Cancel**.

To configure campaign email setup from the Administration page

1. Navigate to the **Emails** section on the Administration Home page, and select **Campaign Email Settings**.
Sugar displays the **Campaign Email Settings** configuration page on the screen.
2. Specify mass mailing options as described in [To configure campaigns email setup from Campaigns module](#)
3. Click **Save**.

The updated settings display on the page as well as on the **Email Setup** page of the Campaigns module

Email Queue

Use this option to view, send, and delete mass campaign emails that are in the queue for dispatch. The system sends out the email only after the start date/time has passed. After a campaign email has been processed, you can view its status in the Campaign module. The system tracks statistics such as the Sent date and number of times an email delivery was attempted.

Use the Scheduler to run nightly mass email campaigns as well as to monitor bounced campaign emails. For more information on scheduling email mailings, see [Scheduler](#).

To manage queued emails

1. To send out campaign emails, select the campaign in the Queue sub-panel below and click **Send Queued Campaign Emails**.
You can select more than one campaign at a time.
2. To delete campaign emails, select the campaign in the **Queue** sub-panel below and click **Delete**; click **OK** to confirm the deletion.
3. To search for a specific campaign, enter the campaign name, or recipient name, or recipient address in the Search fields above and click **Search**; click **Clear** to clear the search fields.

Developer Tools

The Developer tools section displays the following options that enable you to build new modules and customize existing ones.

- [Studio](#)
- [Rename Modules](#)
- [Module Builder](#)
- [Display Module Tabs and Subpanels](#)

- [Module Loader](#)
- [Configure Shortcut Bar](#)
- [Configure Grouped Modules](#)
- [Dropdown Editor](#)

The Module Builder enables you to build custom modules and Studio enables you to customize existing modules. To create relationships between modules, see [Creating Relationships](#).

After you build a module in Module Builder, you can deploy the module directly within the current instance, or you can use the Module Loader to install it in another Sugar instance. For more information, see [Module Loader](#).

Module Builder

Use the Module Builder to create custom modules in Sugar.

The process of creating a custom module is as follows:

1. Create a package to house the new module. You can create one or more modules within a package.
2. Create a module using one of the following templates that Sugar provides for you.

Basic. This template provides basic fields such as ID, Date Entered, and Created By. Use this template to create a module from scratch.

Company. This template provides organization-specific fields such as Company Name, Industry, and Billing Address. Use this template to create a module that is similar to the Accounts module.

File. This template provides document-specific fields such as File Name and Document Type. Use this template to create a module that is similar to the Documents module.

Issue. This template provides case and bug-specific fields such as ID, Description, and Created By. Use this template to create a module that is similar to the Cases module or Bug Tracker module.

Person. This template provides individual-specific fields such as salutation, title, name, address, and phone number. Use this template to create a module that is similar to the Contacts module or the Leads module.

Sale. This template provides opportunity-specific fields such as Lead-Source and Probability. Use this template to create a module that is similar to the Opportunities module.

3. Create new fields, if necessary. You can also rename default fields from the template.

Note: Apart from field names, you cannot edit other field properties in a template. However, you can duplicate the fields and save them with a different name to customize them. You can choose which fields appear in the module layouts.

4. Customize page layouts for List View, Edit View, Detail View, Sub-panels, Search form, and Sugar Dashlets, if necessary.

5. Create relationships between the new module and other modules, if needed. A Sugar module, typically, has multiple relationships with other Sugar modules. When you create a custom module, you can define its relationship with other Sugar modules.
6. Save the package and distribute it.

You can choose one of the following options to distribute the package:

- **Publish.** This option is designed for distribution to specific users or customers. The system creates a zip file, which you can save on your local machine. You can then email it to one or more individuals who can use the Module Loader to upload the zip file into their Sugar instance.
After the module is installed through Studio, you can add or remove fields and make other changes to a published module.
- **Deploy.** This option is designed to install the custom module on your Sugar instance and make it available to users in your organization. After deployment, if needed, you can make further changes to the module in Module Builder and deploy it again to update the installed module.

You can also add or remove fields and make other changes to a deployed module through Studio. However, note that if you change a deployed custom module in Studio and then re-deploy it from Module Builder, the following information will be lost:

- Custom field labels will be lost and, hence, will not display in the page layouts even though the custom fields and the associated data exist in the database.
- The layouts for the custom module will be lost and will have to be created again. If you created custom fields in Studio and added them to the layouts prior to re-deployment, you will have to add them again to the layouts in Module Builder.
- Custom relationships will be lost. The relationship tables and relationships between records that are stored in those tables are deleted from the database.
- **Export.** This option is designed for distribution to developers. The system creates a zip file, which you can save on your local machine and email to other developers. Using the Module Loader, developers can install it on their Sugar instance and customize it further in Module Builder if necessary. The package is visible only in Module Builder and, hence, only administrators can access it until it has been deployed.

To create a package

1. In the **Developer Tools** sub-panel, click **Module Builder** to view the Module Builder page.
2. Click **New Package**.
Sugar displays the **Package** page on the screen.
3. Enter a name for the package and click **Save**.

The system refreshes the page and displays options to duplicate, publish, deploy, export, and delete the package.

4. Enter information for the following fields:
 - Author.** Enter your name as the creator of the package.
 - Key.** Enter an alphanumeric key to distinguish modules with similar names. The system will prefix all class names, directories and tables names with this key.
 - Description.** Enter a brief description of the package.
5. Click **Save** to create the package; to delete the package, click **Delete**.
6. After you save the package, if you want to create a copy, click **Duplicate**.
The system appends a **1** to the package name and saves it as a new package.
7. To publish the package after saving it, click **Publish**.
8. To deploy the package on your Sugar instance after saving it, click **Deploy**.
9. Click **Export** to save the package as a zip file on your local machine.

To create a module

1. Click the **New Module** icon on the Package page.
The Module page displays on the screen
2. Enter information for the following fields:
 - Module Name.** Enter a name for the module.
 - Label.** Enter a name for the module that you want displayed in the Sugar User Interface.
 - Importing.** Selecting this option to allow data import into the module.
 - Navigation Tab.** By default, this option is enabled to create a tab for the module that is identical to other Sugar module tabs.
 - Type.** Click a template to select it for your module
3. Click **Save** to save the module and add it to the package.
The system refreshes the page to display the selected template. The new module is nested within the package listed in the **Packages** panel on the Module Builder home page.
The Packages panel on the left lists all the modules you create within a package. Default fields, labels, layouts, sub-panels, and relationships from the selected template are nested under the module. You can click them to view their details. You can also edit the default layouts, add new fields, and create relationships with other Sugar modules.
For information on customizing a layout or the Search form, see [Editing Layouts for Sugar Modules](#). For information on creating new fields, see [To add fields](#). For information on defining relationships, see [Creating Relationships](#).

To edit Sugar Dashlets

1. On the custom module page, click **View Layouts**. Alternatively, click **Layouts** in the **Packages** panel on the left.
2. Click **Sugar Dashlet**.

You can edit the List View and the Search form for Sugar Dashlets.

3. To edit the List View, click **Sugar Dashlet List View** and follow the procedure described in [To edit List View](#).

To edit the Search form, click **Sugar Dashlet Search** and follow the procedure described in [To edit the Search form](#).

To distribute or install a package

1. In Module Builder, select the package and click **Publish**, **Deploy**, or **Export**.

When you select **Publish** or **Export**, the system saves it as a zip file that you can export to your local machine and distribute as needed. When you select **Deploy**, the system installs all the custom modules in the package on your Sugar instance.

2. When you choose **Publish** or **Export**, select **Save to Disk** and click **OK**.

Use the Module Loader to upload the file from your machine into Sugar and install the module. For more information, see [Module Loader](#).

Deleting Packages

You can delete a package if necessary. When you delete a package, all the files that it contains are also deleted. If you delete a package after it has been deployed, you can uninstall the deployed package using the Module Loader. When you uninstall a package, you have the option of retaining or removing the database tables.

You do not need to delete a package before you install a newer version. The files from the new version will override any existing files from the earlier package. That is, any updates that you made to the package before re-deploying will override files from the earlier package.

Module Loader

Use the Module Loader to install Sugar modules, custom modules, upgrades, language packs, Sugar Dashlets, and themes.

You can create custom modules in the Module Builder. A custom module is contained within a package. When you deploy the package, it becomes available to other users in your organization. When you publish or export the package, you can save it as a zip file on your local machine and then use the Module Loader to upload it into Sugar. For more information on creating packages, see [Module Builder](#).

If you delete a package in Module Builder after it is already installed or deployed, you can uninstall the deployed module in the Module Loader. You can also disable installed modules through the Module Loader.

To install a module

1. In the System sub-panel of the Administration Home page, click **Module Loader**.

If you deployed the package, it is listed in the top panel and has already been made available to other users in your organization. You can uninstall it or disable it by clicking the appropriate button.

2. Click **Browse** to navigate to the location of the module's zip file on your local machine.
3. Select the file and then click **Open**.
The path to the zip file displays in the **Module** field.
4. Click **Upload**.
The uploaded module displays in the bottom panel.
5. Click **Install**.
The license agreement displays on the screen.
6. Select **Accept** to accept the agreement and then click **Commit** to install the module.
If the installation is successful, the system displays a message stating that the module installed successfully.
7. To go back to the Module Loader page, click **Back to the Module Loader**.
The new module's tab is now visible to all users.

To disable and enable a module

1. To disable a module, click the **Disable** button located next to the module's name.
Sugar displays the License Agreement on the page.
2. Click **Accept** to accept the agreement.
3. Click **Commit**.
After the module has been disabled, Sugar displays a message stating that the module has been disabled.
4. Click **Back to Module Loader**.
The Enable button displays next to the module's name.
5. To enable the module, click **Enable**.

To uninstall a module

1. In the Module Loader, click the **Uninstall** button corresponding to the module's name.
The system displays a message stating that the module is ready to be uninstalled and displays options to remove or retain the database tables that were created for the new module.
2. To remove the tables from the database, select **Remove Tables**; if not, select **Do Not Remove Tables**.
3. Click **Commit** to uninstall the module; click **Cancel** to retain the module.
4. Click **Save**.

Studio

Studio enables you to customize modules by adding new fields, editing existing fields, field labels, page layouts, sub-panels, and Quick Create forms. After you customize a

module, you can export it to your local machine and upload in into another Sugar instance using the Module Loader.

The Studio home page displays a list of existing modules in the left panel. These include the default Sugar modules as well as any custom modules that have been deployed. The associated fields, labels, layouts, and sub-panels for each module are grouped within the module. You can click the Plus sign (+) preceding the module name to view them. The right panel displays the same information in the form of icons. You can click a module in either panel to drill down to its fields, labels, layouts, and sub-panels.

The bottom of the page displays buttons to the (Developer Tools) **Home**, **Studio**, **Module Builder**, and the **Dropdown Editor**.

Editing a Module

You can create and edit custom fields, drop-down lists, and field labels for a module. You can also edit the default fields, layouts, and sub-panels. After you edit a module, the updated version will not be available to other users until you publish it. You can use Studio to make changes to a published module.

Note: If you make changes to fields and layouts of a custom module in Studio, some information will be lost if the module is re-deployed from the Module Builder. For more information, see the description of **Deploy** in [Module Builder](#)

To edit a module

1. In Studio, select the module that you want to edit.
2. Select from the following options:

Labels: Select this option to edit field labels. For more information, see [Editing Field Labels](#).

Fields: Select this option to create custom fields, and to edit default fields and custom fields. For more information, see [To add fields](#). Select this option to edit and create drop-down lists. For more information, see [Dropdown Editor](#).

Layouts: Select this option to edit the List View, Detail View, Edit View, Search, and Quick Create forms. For the Leads module, you can also edit the Convert Lead form. For more information, see [Editing Layouts for Sugar Modules](#).

Relationships: Select this option to view existing relationships and create new ones between modules. After you create a relationship, you will need to deploy it to make it available to users. For more information, see [Creating Relationships](#).

Subpanels: Select this option to edit one or more of the module's sub-panels. For more information, see [To edit a sub-panel](#).

3. Click **Save**.

Editing Field Labels

You can edit field labels, button labels, link labels, module titles, and pop-up window messages using the Label editor. You can also change the default field labels for all the

language packs that you have installed. Every module list displays the database fields and the labels they map to in the user interface.

Using the Label Editor instead of the Layout Editor to edit multiple labels for a module reduces the time to edit them.

To change field labels

1. Select the module and click **Labels**.
A list of existing database fields and the labels to which they are mapped displays on the page.
2. If you want to select a different language pack, select the appropriate one from the list of pre-installed language packs in the **Language** drop-down menu.
3. Select the label that you want to edit and enter the new name.
4. Click **Save**.
5. To navigate back to a different module or to Studio, click the appropriate breadcrumb above the **Save** button.

Creating and Editing Fields

You can add custom fields to any module in Sugar. When you add a custom field, the application adds the field to the appropriate database table and stores the generated metadata. You can then add the fields to the desired layout, such as Edit View and Detail View. For custom modules, you can create fields in the Module Builder.

Use Studio to edit fields in a custom module after it has been published.

The Field Editor allows you to edit some properties of custom fields and change the display label and some properties of standard fields such as the field length, row size, and column size. You can also mark a standard field as a required field or an audited field. These properties are described in [To add fields](#).

Note: You cannot change the field name or data type of existing fields. However, you can change the display label.

To add fields

1. To add a new custom field to a module, select the module and click **Fields**.
The page displays the current default fields that Sugar provides as well as any existing custom fields.
2. Click **Add Fields**.
The Field Editor displays the field types as shown below:
The information that you need to specify varies depending on the selected data type.
3. In the **Field Editor**, enter values for the following:
 - Data Type.** From the drop-down list, select one of the data types listed below.
 - **Text Field.** Creates a text field for fields such as first name and last name.

- **Address.** Creates fields for street, city, postal, state, and country.
- **Checkbox.** Creates a checkbox for data fields with a Yes/No action; users can click the checkbox to turn on or turn off the action.
- **Currency.** Creates a field to enter a currency. The system automatically creates a field of the currency type if the field does not exist.
- **Date.** Creates a field to enter a date.
- **DateTime.** Creates a field to enter the date and time. Enter the default values in the field that displays when you select this data type. You can select a date and time, such as **first day of next month, 12:00pm** from the drop-down list below.
- **DropDown.** Creates a field that you can associate with a drop-down list of values. For more information on drop-down lists, see [Dropdown Editor](#).
- **Decimal.** Creates a field to hold a number with a specified precision past the decimal point. Sugar stores the exact representation of the number in the database. For example, 1.23 is stored as 1.23.
- **Float.** Creates a field to hold a number with a specified precision past the decimal point. Sugar stores a very close approximation of the specified value. For example, 1.23 may be stored as 1.2345670000. Because using the Float data type instead of the Decimal data type enhances performance, it is recommended that you use it if exact precision is not required.
- **HTML.** Creates static HTML-formatted text to display in record views.
- **IFrame.** Creates an IFrame field. For more information, see [Embedding Links and IFrames in a Layout](#).
- **Integer.** Creates a field to specify positive or negative numbers. You can specify a range with the Min and Max Value fields.
- **MultiSelect.** Creates a drop-down list of values. Users can select one or more values from the list.
- **Flex Relate.** Creates a drop-down list from which you can associate a related record. Because you can add only one Flex-Relate field to a module, this option does not display in the Data Type drop-down list if you attempt to add it to a module that already contains a Flex Relate field.
- **Phone.** Creates a field to enter a phone number.
- **Radio.** Creates a radio button.
- **Relate.** Creates a field to associate a record with another record as a one-way relationship. You can add multiple Relate fields to a module. The Users module can be selected for custom Relate fields that can be used to relate records to Users.

Note: Relate fields and custom relationships are independent of each other. Changes made to either one are not reflected in the other.

- **Text area.** Creates a large field for a block of text.
- **URL.** Creates a field that links to a URL.
- **TextField.** Create a field for text.

Depending on the data type that you select, you will need to specify values for some of the fields listed below.

- **Field Name.** Enter a name for the field. The system adds it to the Sugar database. Do not use spaces or special characters.
- **Display Label.** The system uses the field name as the label that will display in the Sugar User Interface. You can enter a new value if needed.
- **System Label.** Sugar auto-populates this field with the label that it uses internally to refer to the field. This is the label that Sugar displays on the module's **Edit Labels** page in **Studio**. You can change this value.
- **Help Text.** Enter descriptive text for the field. Sugar displays this text when the user points the cursor at the field. Regular users cannot view this text.
- **Comment Text.** Enter additional comments, if needed, about the field.
- **Default Value.** Enter a default value for the field, if necessary.
- **HTML.** Sugar displays this text box when you select the HTML data type. Enter the HTML code in this box.
- **Max Size.** Enter the maximum number of characters that users can enter in the field. This is for text data fields.
- **Mass Update.** Sugar displays this option when you select the DropDown data type or the Date data type. Use it to add the field to the module's Mass Update section.
- **Drop Down List.** For DropDown, MultiSelect, and Radio field data types. For information on creating a drop-down list, see [To create a drop-down list](#).
- **Min Value.** Sugar displays this field if you select the Integer data type. Enter a minimum value during data input.
- **Max Value.** Sugar displays this field when you select the Integer data type. Enter a maximum value during data input.
- **Auto Increment Next Value.** You can specify an incremental value for the next number for numerical fields such as bug numbers and case numbers.

Note: If you are using Oracle database, changes to the auto-increment value will be reflected in the Sugar User Interface only after creating a record in the target module such as Bugs.

- **Precision.** Sugar displays this field when you select the Decimal data type. Enter a number to specify the number of digits to the right of the decimal point.
- **Required Field.** Select this option to specify that users must enter a value for the field when creating a record.
- **Audit.** Select this option to display field values when a user clicks **View Change Log** on a record's Detail View.
- **Importable.** From the drop-down list, select one of the following:
 - Select **Yes** to enable users to import a value into the field.
 - Select **No** to prevent users from importing a value into the field.
 - Select **Required** to make it a required field during import.

- **Duplicate Merge.** From the drop-down list, specify one of the following options for the Duplicate Merge functionality that allows users to merge records from a record's Detail View.
 - **Enabled:** The field will appear on the Merge Duplicates page, but will not be available as a filter condition on the Find Duplicates page.
 - **Disabled:** The field will not appear on the Merge Duplicates page, and will not be available as a filter condition on the Find Duplicates page.
 - **In Filter:** The field will appear on the Merge Duplicates page and will also be available in the Find Duplicates page.
 - **Filter Only:** The field will not appear on the Merge Duplicates page, but will be available on the Find Duplicates page.
 - **Default Selected Filter:** The field will be used for a filter condition by default on the Find Duplicates page, and will also appear on the Merge Duplicates page.
- 4. Click **Save** to create the field.

The new field is listed in the Custom section. The system appends the field name with ‘_c’ to indicate that it is a custom field. You can now add the field to the desired layout of a module.

To edit fields in Studio

1. Select the module and click fields to navigate to the Edit Fields page.

The **Edit Fields** page displays custom fields in the **Custom** section and default fields in the Default section.
2. Click the field to view its properties in the **Field Editor**.
3. Edit the properties as needed and click **Save**.

You can view the updated field in the module's records.

To manage fields

- To duplicate the field, click **Clone**, enter a new name, and click **Save**.
- To delete the field, click **Delete**. You must also remove the field from any layout to which it was added.

Editing Subpanels

Every record's Detail View displays sub-panels for related records from other modules. You can add or remove fields for these sub-panels depending on the information that you want to display to users. You can also rename a sub-panel if needed.

To edit a sub-panel

1. Select the module and then click **Subpanels**.

Sugar displays the sub-panels for the selected module on the page.
2. Select the sub-panel that you want to edit.

The page displays the list of default fields and a list of fields that are available for display.

3. To change the sub-panel's name, enter the new name in the **Title** field.
4. To add a field to the sub-panel, select it from the **Hidden** column and drag it to the **Default** column.
5. To remove a field from the sub-panel, select it from the **Default** column and drag it to the **Hidden** column.
6. To save and display your changes in the module, click **Save & Deploy**.
7. If you do not want the changes that you made, click **Restore Default** to change back the layout to its original form.

Note: You cannot use the **Restore Default** button to restore the default title of the sub-panel.

8. To view a list of time stamps for changes that were made to the sub-panel, click **View History**.

You can view changes that were made at a particular time on a certain date and reinstate those changes if needed. For more information, see [To preview and restore changes](#).

Editing Layouts for Sugar Modules

You can edit the page layouts for modules in Sugar. You can move fields, add fields, and remove fields. You can also change the tabbing order to move from field to field.

The breadcrumbs to navigate back to Studio display above the layout. The Toolbox stores fields that are not currently displayed in the layout. It also provides new rows to add to the view and a list of available fields that you can add.

You can edit the following layouts for a module:

- List View
- Detail View
- Edit View
- Convert Lead form for the Leads module
- Quick Create form
- Sugar Dashlet
 - List View
 - Search
- PopupView
 - ListView
 - Search
- Search
 - Basic Search form
 - Advanced Search form

- Sub-panels

List View Layout. When you select **List View**, the system displays separate columns of fields that are currently displayed in the view, fields that are available for display, and hidden fields. You can click and drag a field from one column to the other depending on what you want to display to users.

Detail View, Edit View, and Quick Create Form Layouts. When you select **Detail View** or **Edit View**, the system displays the various sections of the current layout, along with the fields in each section. You can click and drag a field to a different location within the layout.

For Edit View, Detail View, and Quick Create forms, you can also change the order in which the user tabs from field to field. For example, when users create a new account, they can tab from the **Account Name** field to the **Website** field and so on. You can change the tabbing order to so that users tab from account name to email.

To edit List View

1. In Studio, select the module.
2. Click **Layouts**, and then click **List View**.

To edit a Sugar Dashlet List View, navigate to **Layouts > Sugar Dashlet > Sugar Dashlet List View**.

To edit the List View for a Pop-up window, navigate to **Layouts > Popup View > Popup List View**. Sugar displays the Pop-up window when you click **Select** in the sub-panel of a related module in a Detail View.

Sugar displays the **List View** page on the screen. The **Default** column lists fields that currently display in the User Interface. The **Available** column lists fields that are available to users through Advanced Search. Users can search for and add any of these fields that they want to view in the search results. The **Hidden** column lists fields that you do not want users to view when they perform an advanced search.

3. To display a field in List View, select and drag the field from the **Available** or **Hidden** column and drop it into the **Default** column.
4. To remove a field from List View, select and drag the field from the **Default** column and drop it in the **Available** column.
5. To hide a field from users, drag it from the **Default** or **Available** column and drop it in the **Hidden** column.
6. To move a field within the layout, drag and drop it into its new location.
7. Click **Save & Deploy** to display the updated List View in the User Interface.
8. Click **View History** to view a list of previous changes along with the date and time of each change.
 - a. To preview the changes made at a particular time, click the adjacent **Preview** button.
 - b. To restore the previous version of the List View, click the adjacent **Restore** button.

9. To revert back to the default layout, click **Restore Default**.

To edit a Detail View, Edit View, or Quick Create form

1. Select the module in Studio.

To edit the Detail View layout, navigate to **Layouts > Detail View**

To edit the Edit View layout, navigate to **Layouts > Edit View**

To edit the Quick Create form layout, navigate to **Layouts > Quick Create**.

2. You can edit a layout as follows:
 - To add new fields or replace existing ones with blanks, drag the filler row under **New Row** and drop it into the layout. You can then drag a field from the **Toolbox** into the filler row.

Note: In the Edit View layout of the **Leads** module, the **First Name** and **Last Name** fields are used to input the lead's name. Sugar concatenates these two values to display the lead's name in the Detail View.

- To remove an existing field, drag it to the **Recycling Bin** in the **Toolbox**. The field is removed from the layout, but is not deleted from the system.
 - To replace an existing row in the layout with another one, drag the new field from **Available Fields** and drop it on the field that you want to replace.
 - To create a panel or row, drag **New Panel** or **New Row** into the Current Layout.
 - A new panel or row contains two blanks fields. To add more fields to the panel or row, drag **New Panel** or **New Row** into the panel again.
 - To enter or edit a field label, click the **Edit** icon within the field and enter the label in the **Properties** panel; click **Save** to create the label.
 - To move a field to a different location, drag it to the desired location on the page.
 - To edit the tabbing order, click the **Edit** icon within the field and enter a numeric value in the Tab Order field of the Properties panel; click **Save**. The tabbing order for each field is represented by numbers such as 1, 2, and 3. You can change one or more numbers to change the order in which users tab to those fields.
 - To display each panel as a separate tab instead of displaying all panels on one page, select the **Display Tabs as Panels** option located next to the **Restore Default** button.
3. Click **Save** to save your changes.
 4. Click **Save & Deploy** to display the updated view in the Sugar User Interface.
 5. Click **View History** to view a list of previous changes along with the date and time of each change.
 - a. To preview the changes made at a particular time, click the adjacent **Preview** button.
 - b. To restore the previous version of the view, click the adjacent **Restore** button.

6. To revert back to the default layout, click **Restore Default**.

Copy/Sync Edit and Detail Views

Modifications made to the Edit View in Layouts can be copied to the Detail View. The Layouts Detail View can also be synced with the Edit View so that any changes made to the Edit View are automatically reflected in the Detail View.

To copy/sync Edit and Detail Views

Follow the steps listed below to sync modifications made to the Edit View of Layouts of a module, for example **Accounts**, to the Detail View of the Layouts of the same:

1. Click **Studio** in the **Developer Tools** section of the **Administration** page.
2. Select **Layouts** under **Accounts** in the **Modules** section.
3. Click **EditView** in the **Accounts Layouts** pane.
4. Drag and drop items between the **Toolbox** and **Layout** sections.
5. Select the **Sync to DetailView** checkbox.
6. Click **Save and Deploy**.
7. Go to the **Accounts** module in Sugar to verify that the changes have been deployed

To edit the Search form

1. To edit the Search form for the module, click the module, navigate to **Search**, and select **Basic Search** or **Advanced Search**.

To edit the Search form of the module's Sugar Dashlet, navigate to **Sugar Dashlet > Sugar Dashlet Search**.

To edit the module's Popup View Search form, navigate to **PopupView > Popup Search**.

The fields in the current Search form are listed in the **Default** column, and the available fields are listed in the **Hidden** column.

2. To remove an existing field from the search form, drag it from the **Default** list to the **Hidden** list.
3. To add a field to the search form, drag it from **Hidden** column to the **Default** column.
4. To save your changes, click **Save & Deploy**.
5. To revert back to the default layout, click **Restore Default**.

To preview and restore changes

1. Click **View History** to view a list of time stamps for changes that were made to a layout, a Search form, or a sub-panel.
2. To preview the changes for a timestamp, click the adjacent **Preview** button.

The **Preview** page provides a **Restore** button that corresponds to each timestamp. You can use this button to restore the changes made for a specific timestamp.

Alternatively, click a timestamp to restore the layout that existed before the changes made at that time.

To edit the Convert Lead form

1. In Studio, select the **Leads** module and navigate to **Layouts**.
2. Select **Convert Lead** to view the **Convert** page.
This page displays a list of related modules, such as accounts, opportunities, notes, and so on. Users can create these related record during the process of converting a lead to a contact. You can add and remove related modules as needed.
3. If you want the user to create a record in a related module during lead conversion, select the **Required** box corresponding to the module. The user will then have to create the related record in order to successfully convert the lead to a contact.
4. To copy values from fields that exist in both Leads and a related module to the newly created records, select the **Copy Data** box corresponding to the related module. The fields must have the same name in both modules. For example, if you add a custom field called **Category** to both Leads and Notes, and then enable the **Copy Data** option for the Notes module, the **Category** field in Leads will be copied into any new Notes created during the convert Lead process.
5. To select a record from a module that has a one-to-one relationship, or a one-to-many relationship with the Contacts module (that is, many contact records associated with one record in the related module), select the **Allow Selection** box. By default, only the Accounts module has a relationship with the Contacts module, hence the **Allow Selection** box is selected for Accounts.
6. To edit a module's page layout, click the **Edit** icon, make the necessary changes, and click **Save**.
7. To remove the relationship with a related module, click the **Delete** icon, and click **OK** to confirm the removal.
The deleted module no longer displays in the list of related modules in the Convert Lead form.

Exporting Module Customizations

You can export a module's customized layouts, fields, and field labels from one Sugar instance to other Sugar instances. To do this, you will need to package the customizations in Studio, export it to your local machine, and upload it into another Sugar instance. The system applies the customizations to the appropriate layouts, fields, and field labels.

To publish a customized module

1. On the Studio home page, click **Export Customizations**.
The **Export Customizations** page displays a list of customized modules and the type of customization, such as customized layouts, fields, or labels.
2. Enter the following information:

Package Name. Enter a name for the export package. The package will contain the customizations that you select.

Author. Enter your name as the author.

Description. Enter a brief description of the package.

3. Select the customizations you want to export.
4. Click **Export**.

The system creates a zip file and displays a dialog box that allows you to open the file or save it to a disk.

5. Select **Save to Disk** and click **OK**.

On Windows, the system saves the zip file in the **Downloads** directory.

6. Open the other Sugar instance, upload and install the zip file using Module Loader. For more information, see [Module Loader](#).

Embedding Links and IFrames in a Layout

A Link field allows you to store a URL in a record such as a customer's website or a link to a related internal or external system. The URL can either be entered as a normal field in an Edit View, or it can be dynamically generated based on other fields in the record. For example, you can automatically generate a link to a Google map of an account's address. To do this, click the **Generate URL** check box and insert the following in the Default Value field:

```
http://maps.google.com/?q=
```

Next, select **billing_address_postalcode** from the drop down above the Default Value field and click the **Insert Field** button.

The default value now reads:

```
http://maps.google.com/?q={billing_address_postalcode}
```

You can also embed a view of the website itself in the layout rather than as a link by using the IFrame field. IFrames support regular URLs as well as generated URLs.

You cannot edit generated URLs in a record's Edit View. You can only change them in the Module Builder or Studio. You can edit regular URLs in a record's Edit view.

To embed a manually entered URL

1. From the **Data Type** drop-down list, select **IFrame** or **URL**.
2. Enter a name for the field.
3. Enter the desired max size.
4. If using an IFrame, enter the desired height in pixels for the view.
5. Click **Save** to create the field.

To embed a dynamically generated URL

1. From the **Data Type** drop-down list, select **IFrame** or **URL**.
2. Enter a name for the field

3. Click the **Generate URL** checkbox.
4. Insert the base URL into the **Default Value** field.
5. Select a field you wish to include in the URL from the dropdown and click **Insert Field**.
6. Click **Save** to create the field.

Creating Relationships

Typically, a Sugar module has relationships with other Sugar modules. For example, Accounts is related to Contacts, Leads, Opportunities, and several other modules. Related records from these modules display in fields or sub-panels on an account's detail page. You cannot edit these pre-defined relationships.

In Module Builder, you can create relationships between undeployed modules, and between undeployed modules and deployed modules. If you want to change a relationship after you have deployed the module, you can redefine or delete the relationship and then re-deploy the module package.

In Studio, you can create relationships only between deployed modules. After you deploy a relationship in Studio, you cannot change it.

You create one relationship at a time from the Relationship Editor. When you create a relationship for a module, it is considered to be the primary module and the module that you relate it with is the related module. Depending on the relationship type, the relationship is expressed with sub-panels and related-to fields. When you create a new relationship between two modules, the system automatically creates the necessary sub-panels, related-to fields, and metadata relationships.

Note: It is recommended that you use a Relate field to create a one-way relationship between modules. To create a two-way relationship between modules, use the Relationship Editor.

You can also create a relationship between a module and itself. In this case, the relationship becomes a parent-child relationship. For example, you can create a relationship from Accounts to Accounts in order to create sub-accounts within the primary account.

In Module Builder, you can select Activities as the related module but not its sub-modules such as Tasks, Calls, and Meetings. The relationship is automatically reflected in these sub-modules.

In Studio, you can select a sub-module of Activities when you create a relationship. So, when you select Activities as a related module in the Module Builder, you can use Studio to define the relationship further for its sub-modules.

Relationship Types. The relationship types are as follows:

One-to-one: Records in the primary module and the related module are uniquely related to each other. For example, an account can be associated with only one contact and a contact can be associated with only one account. This account value will display in the contact's Detail View, and the contact value will display on the account's Detail View.

One-to-many: A record in the primary module can have relationships with many records in the related module. For example, an account can be associated with many contacts, and many contacts can be associated with the same account. The Detail View of the primary module will display a sub-panel for the related module, and the Detail View of the related module will display a Related-to field containing a link to the related record.

Many-to-one: Records in the primary module can have a relationship with one record in the related module. For example, an account can be associated with one contact. The Detail View of the primary module will display a field for the related module from which you can select a record, and the Detail View of the related module will show a sub-panel for the primary module from which you can create or select records.

Many-to-many: In this relationship, records in both the primary module and the related module can have relationships with multiple records in each module. For example, an account can be associated with many bugs, and a bug can be associated with many accounts. The Accounts Detail View will display a Bugs sub-panel. Similarly, the Bugs Detail View will display an Accounts sub-panel.

The type of relationship that you can create depends on your choice of primary and related modules. This is because only a module with sub-panels can have a one-to-many or a many-to-many relationship with another module. A sub-panel is needed to show all the related records from the other module.

For example, with Accounts as the primary module and Knowledge Base as the related module, you can create only a one-to-one relationship between them. This is because Knowledge Base lacks a sub-panel. Therefore, Accounts cannot display related records from Knowledge Base. However, if Knowledge Base is the primary module and Accounts is the related module, you can create a one-to-many relationship between them because Accounts has sub-panels and, therefore, Knowledge Base can display related records from Accounts.

If you are creating a relationship between a custom module and a Sugar module, then you can choose any relationship type because all custom module types include at least one sub-panel.

Sub-panel Types. Sugar provides many sub-panel types for your use. When you create a relationship that involves sub-panels, Sugar displays all sub-panel types available for that module for your selection. A sub-panel can display different sets of fields depending on the primary module to which it is related. For example, there are several types of sub-panels for Contacts. The Contacts sub-panel that appears under Accounts contains different fields than the Contacts sub-panel that appears under Cases.

The **Default** type of sub-panel contains the most commonly used fields in the module. Every module has a **Default** type that contains a set of fields to display as a sub-panel. Select **Default** if you want to display the most commonly used fields in the sub-panel in the relationship that you create.

For example, if you create a one-to-many relationship between Calls and Accounts, you can select a sub-panel type for the Accounts sub-panel in the Calls Detail View. To use a sub-panel consisting of the most commonly used fields from Accounts, select

the **Default** sub-panel type; to use the Accounts sub-panel from the email's Detail View, select **ForEmails**.

You can create relationships in Module Builder as well as in Studio. However, there are some differences, which are noted in the table below:

Relationship in Module Builder	Relationships in Studio
You can create relationships with other Sugar modules as well as other modules within any undeployed package.	In Studio, you can create relationships only between deployed modules.
If you want to change a relationship after you have deployed the module, you can redefine or delete the relationship and then re-deploy the module package.	You can delete a relationship after you deploy it, but you cannot redefine it.
You can select Activities as the related module but not its sub-modules such as Tasks, Calls, and Meetings. But the relationship is automatically reflected in these sub-modules.	You can select a sub-module of Activities when you create a relationship. So, when you select Activities as a related module in the Module Builder, you can use Studio to further define the relationship for its sub-modules.

To create a relationship in Module Builder

1. Click the custom module to view its details.
2. Click **View Relationships**.
Sugar displays existing relationships, if any, on the page.
3. Click **Add Relationship**.
4. To localize the relationship label, select the language pack from the **Language** drop-down list.
5. Select the relationship from the **Type** drop-down list.

If you select a **One-to-One** relationship, you can choose a related module. Sugar displays the related module as a field in the primary module, and the primary module as a field in the related module.

If you select a **One-to-Many** relationship, you can select a related module. Sugar displays sub-panels of the related modules in the Detail View of the primary module. The sub-panel options vary depending on the related module that you select.

If you select a **Many-to-One** relationship, you can select a related module. Sugar displays a the primary module as a sub-panel in the Detail View of the related module.

If you select a **Many-to-Many** relationship, you can select sub-panels for the primary module as well as the related module.
6. From **Related Module** drop-down list, select the module you want to relate to the primary module.
7. From the Subpanel field for the related module, select the sub-panel type that you want displayed on the detail page of the primary module.

8. From the **Subpanel** field for the primary module, select the sub-panel that you want displayed on the detail page of the related module.
9. Click **Save** to create the relationship.

The new relationship displays under the **Add Relationship** button in the middle panel. Sugar appends it with an asterisk to denote a custom relationship.

To create a relationship in Studio

1. Select the module in Studio and click **Relationships**.

Sugar displays a list of existing relationships for the primary module on the page.
2. To create a relationship, click **Add Relationship**.

The Relationship Editor displays on the page.
3. Follow the process described in [To create a relationship in Module Builder](#).

To manage a relationship

1. To edit a relationship, in Module Builder, click its name in the Relationships list and make the necessary changes in the **Edit Relationship** tab and save it.

You cannot edit or delete relationships in Studio.
2. To delete a relationship, click **Delete**.

Rename Modules

Rename Tabs is now labeled **Rename Modules**. With this feature, module names are displayed in singular and plural form, depending on their use. For example, if the module name is Contact (for singular) and Contacts (for plural), the module tab is displayed as **Contacts** and options in the **Actions** bar display as **Create Contact**, **View Contacts**, and so on. This also applies to every instance of the module name across the system.

You can also change the names of the modules appearing within the application using singular and plural labels for the module names. For example, Contact can be modified to Person and Contacts can be modified to People.

To rename modules

1. In Developer Tools, click **Rename Modules** link.

This displays the **Administration » Rename Modules** page.
2. Click the Edit icon located next to the module name.

This displays the **Singular Label** and **Plural Label** fields.
3. Input the information in the fields to define the singular and plural names of the module.
4. Click **Save**.

Display Module Tabs and Subpanels

This option enables you to hide or display selected module tabs and sub-panels from users and reorder them as needed.

When you hide a module tab from a user, it is not visible to the user upon logging into Sugar. However, if the hidden module is related to a module that is visible to users, it displays as a sub-panel in the Detail View of the related module. Therefore, users can still access related records of the hidden module from the Detail View of the related module. Therefore, use roles to block users completely from accessing a module. For more information, see [Role Management](#).

When you hide a sub-panel, users cannot view related records from the Detail View of a related module.

You can allow users to configure tabs for modules that they can access from their User Preferences page. This will enable users to override the global settings that you set with this option.

By default, the following modules are hidden:

- Projects
- Bug Tracker
- Forecasts
- Contracts
- Knowledge Base

Note: You cannot hide the Home tab.

To configure module tabs and subpanels

1. In **Developer Tools**, select **Display Module Tabs and Subpanels**.
Sugar displays all the module tabs and sub-panels on the **Select Module Tabs and Subpanels** page.
2. To hide a module, drag it from the **Displayed Tabs** column and drop it in the **Hidden Tabs** column; to display a module, drag it from the **Hidden Tabs** column and drop it in the **Displayed Tabs** column.
3. To rearrange the display order of a tab, drag and drop it into the desired position.
4. To prevent users from configuring module tabs, deselect the **Allow users to configure tabs** option.
5. To hide a sub-panel, drag it from the **Displayed Subpanels** column and drop it into the **Hide Subpanels** column. To display a sub-panel, drag it from the **Hidden Subpanels** column and drop it in the **Displayed Subpanels** column.
6. Click **Save** to save the configuration; click **Cancel** to exit the page without saving your changes.

Configure Shortcut Bar

Use this option to select the modules for which Quick Create forms would be available on the Shortcut bar. By default, Cases, Bug Tracker, Documents, and Targets are disabled, hence icons for these modules do not display in the Shortcuts bar.

To enable or disable Quick Create forms for a module

1. To enable the Quick Create form for a module, select the module from the **Disabled Modules** list and drag it to the **Active Modules** list.
To disable the Quick Create form for a module, select the module from the **Active Modules** list and drag it to the **Disabled Modules** list.
2. Click **Save** to update the settings.

Configure Grouped Modules

You can use the Configure Grouped Modules feature to organize modules within groups. Users can select these groups to view the modules within those groups. For example, you can group the Contacts, Leads, and Opportunities modules under a Sales group, and the Cases, Bug Tracker, and Products modules under a Support group. Users can then select either the Sales group or the Support group to view the corresponding set of modules.

You can add the same module to multiple groups. For example, Contacts can be part of the Sales group as well as the Marketing group.

The system provides following group tabs:

- Sales
- Marketing
- Support
- Activities
- Collaboration
- Reports

You can change the labels for any of these tabs and also add new groups, if needed.

Users have the ability to change the configuration to grouped modules or ungrouped modules from their User Preferences page.

To configure and manage grouped modules

1. In Developer Tools, click **Configure Grouped Modules**.
Sugar displays the default groups on the **Configure Grouped Modules** page. The associated modules are listed below each group tab.:
 2. To edit the name of a group tab, click the **Edit** icon, located beneath the group name, and enter the new name in the text field; click **Save**.
Sugar displays the new group name.
 3. To remove a module tab from a group tab, place the cursor on the name and drag it to the **Remove Module from Group** bucket on the left.

The module no longer displays under the group tab.

4. To add a module to a group tab, select it from the **Modules** list on the left, drag and drop it into the Group list, just below the **Edit** and **Delete** icons.

Under a group tab, you can rearrange the order of the module tabs by selecting a tab name and dragging it to a different location in the list.

5. To save your changes and make them available for users, click **Save & Deploy**.

To add a new group tab

1. Click **Add Group**.

This displays the **New Group** page.

2. To name the new group tab, click the **Edit** icon, enter the name in the text field, and click **Save**.
3. To add a module tab under the new group tab, select it from the **Modules** list and drop it in the group, below the **Edit** and **Delete** icons.
4. To save your changes and make it available for users in the Sugar User Interface, click **Save & Deploy**.

Dropdown Editor

Most modules display at least one drop-down field containing a list of values from which users can choose. For example, when users create an account, they can choose a specific industry type and an account type in the respective drop-down fields.

As the administrator, you can use the Dropdown Editor to create new drop-down lists, and to edit values of a drop-down list to suit your organization's needs. When you create a new drop-down field in Studio, you must associate it with an existing drop-down list.

To create a drop-down list

1. Scroll down to the Developer Tools section on the Administration home page, and select **Dropdown Editor**. Alternatively, on the Studio home page, click the **Dropdown Editor** tab located at the bottom of the page.

Sugar displays the Dropdown Editor page, which contains existing drop-down lists.

Note: You can also add a drop-down list in the process of creating a custom field with the DropDown data type in Studio.

2. Click **Add Dropdown**.

Sugar displays fields to add a new drop-down list in the Edit drop-down tab.

The **Name** field displays the name that you specified. The system automatically appends **_list** to the drop-down name to identify the data type in the database. You can use your own data type naming convention if needed.

3. From the **Language** drop-down list, select a pre-installed language pack of your choice.

4. In the **Item Name** field, enter a name for the item.
5. This is the name that is saved in the Sugar database.
6. In the **Display Label** field, enter a label name for the item.
This is the label that displays to users.
7. Click **Add**.
The name of the item displays above the **Item Name** field. This is the name that displays in the User Interface. To add additional items, click **Add** and repeat the process.
8. To display the items in ascending order, click **Sort Ascending**; to display them in descending order, click **Sort Descending**.
9. Click **Save** to save the drop-down list.
The list displays in the dropdown list on the **Edit Field** tab of a module.

To edit an existing drop-down list

1. Select an existing drop-down field from the Dropdown Editor.
2. To change an item's display label, click the corresponding **Edit** icon and enter the new label.
3. To remove an item, click the corresponding **Delete** icon.
4. To add a new item, enter the item name and display label in the fields below; to add additional items, click **Add** and enter values for the next item.
5. Click **Save** to save your changes; to undo your changes, click **Undo**; to redo your changes, click **Redo**.

Bug Tracker

This section provides the Releases option that enables you to maintain a list of releases for your product. This list will be available in the **Release** drop-down box that is displayed when reporting a new bug in the Bug Tracker module.

To create a release

1. On the **Administration Home** page, select **Releases** from the **Bug Tracker** sub-panel.
2. On the **Releases Home** page, click **Create**.
3. In the **Release** sub-panel that displays below the list, enter information for the following fields:
Release Version. Enter the version number of the release.
Status. From the drop-down list, select **Active** to display the name in the Release drop-down list.
Order. Enter a number to specify the order in which the release is displayed in the drop-down list.
4. To add the release to the list, click **Save**.

5. To add another release to the list, click **Save and Create New**.

Employee Records

As an administrator, you can create and manage employee records. When you create an employee record, it is automatically added to the Employees list as well as the Users list. Similarly, when you delete an employee, the associated user record is also deleted.

To create an employee record

1. Log into Sugar as an administrator.
2. Click the **Employees** link located at the top right-hand corner of the page.
3. From the **Actions** bar on the **Employees** tab, select **Create Employee**.
4. On the **Employees** page, enter information for the following fields:

First Name. Enter the employee's first name.

Last Name. Enter the employee's last name.

Employee Status. From the drop-down list, select one of the following status options:

Active: Select this option to specify a current employee of your organization.

Terminated: Select this option if the employee is no longer working for your organization.

Leave of Absence: Select this option if the employee is going to be absent from work for an extended period of time.

Title. Enter the employee's official title.

Department. Enter the name of the department to which the employee belongs.

Reports to. Enter the name of the employee's supervisor.

Office Phone. Enter the employee's office phone number.

Mobile. Enter the employee's cell phone number.

Other. Enter an alternative phone number for the employee, if any.

Fax. Enter the fax number for the employee.

Email. Enter the email address for the employee.

Home Phone. Enter the home phone number for the employee.

Other Email. Enter an alternative email address for the employee, if any.

IM Type. From the drop-down list, select the type of Instant Messenger service that the employee has.

IM Name. Enter the employee's user name for the IM service.

Notes. Enter any comments concerning the employee.

Primary Address. Enter the employee's primary address.

City. Enter the name of the city.

State. Enter the name of the State.

Postal Code. Enter the zip code of the address.

Country. Enter the name of the country.

5. Click **Save** to create the employee record; click **Cancel** to exit the page without saving your changes.

You can now view the record in the Employees List View as well as the Users List View.

To manage employee records

- To edit an employee's record, open the record, and click **Edit**. Update the information as needed, and click **Save**.
- To delete an employee, open the record, and click **Delete**.
- To search for an employee, use the **Search** sub-panel located above the Employees list.
- To view an employee's details such as the title and contact information, click the employee name in the List View.
- To email an employee, click the user's email address in the List View.
- To export employee records, select them from the list, click **Export** and follow the process detailed in [Exporting Data](#).
- To edit the status of multiple employees, use the **Mass Update** panel as described in [Editing and Deleting Multiple Records](#).
- To duplicate a record, on the detail page, click **Duplicate**, modify the information if needed, and click **Save**. Duplication is a convenient way of creating a new employee. You can change the information in the duplicate record to create the new employee.
- To go back to the **Employees Home** page from a detail page, select **Employees** from the **Actions** bar on the module tab.

Advanced Configuration Options

The advanced configuration options listed below enable you to exercise tighter control over user actions in your Sugar instances.

Locking Down Upgrade Wizard, Module Builder, and Backups

If you are managing multiple instances of the Sugar application, you can maintain complete control over the Sugar instances by preventing users with administrative privileges from making any changes. To do this, you can lock down the Upgrade Wizard, Module Builder, and Backups.

To lock down the Upgrade Wizard, Module Builder, and Backups

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

```
$sugar_config['admin_access_control']=true
```

3. Save the file.

Restricting the Module Loader

To ensure that users with administrative privileges do not load sub-standard modules into Sugar, you can restrict the Module Loader to a specific directory that you control. This allows you to check modules before they are loaded into Sugar.

To restrict the Module Loader

1. Navigate to the **config.php** file in the Sugar root directory.
2. Set the following parameters as shown below:

```
$use_common_ml_dir=true
```

```
$common_ml_dir='ml directory'
```

where **ml directory** is the name of the directory from which module will be loaded into Sugar.

3. Save the file.

Limiting System Resources

By default, Sugar terminates any request or post that runs more than 1000 queries. For export, import, administration, and synchronization, the maximum number of queries allowed is 50,000 per request. This prevents user-initiated processes from taking up too many system resources. You can change these settings as desired in the **config.php** file.

Configuring Default Permissions for Sugar Files on Linux

If you are running Sugar on Linux platform, you can control ownership and accessibility to all Sugar files and folders by configuring default user and group permissions.

The following is an example of setting Read, Write, and Execute permissions for the Apache user and the Apache group on Centos operating system:

```
'default_permissions' => array(
    'dir_mode' => 02770,
    'file_mode' => 0660,
    'chown' => 'apache',
    'chgrp' => 'apache',),
```

For `dir_mode`, you may see a value of 1528, which is the decimal equivalent of the octal value 02770. For `file_mode` you may see a value of 432 which is the decimal equivalent of octal value 0660.

Index

A

- accounts
 - creating [51](#)
 - managing [52](#)
 - records, merging duplicates [35](#)
- activities
 - scheduling [59](#), [61](#), [65](#), [81](#), [83](#)
- address book, using [76](#)
- AJAX UI
 - enable, disable [131](#)

B

- browser, navigating [15](#)
- bug tracker
 - releases, creating [178](#)
- bugs
 - creating [101](#)
 - managing [102](#)
 - records, merging duplicates [35](#)
 - reporting [101](#)

C

- Calendar [59](#)
- calendar
 - shared, viewing [60](#)
 - viewing [20](#)
- calls, scheduling [61](#), [65](#)
- campaigns
 - creating [89](#)
 - diagnostics, running [95](#)
 - email
 - executing [91](#)
 - email marketing records, creating [92](#)
 - email settings [152](#)
 - lead forms, creating [98](#)
 - mail merge [99](#)
 - managing [96](#)
 - module [85](#), [87](#), [89](#)
 - newsletter

- creating [94](#)
 - description [89](#)
- ROI reports [98](#)
- targets
 - creating [85](#), [87](#), [89](#)
 - importing [85](#), [87](#), [89](#)
- targets list, creating [88](#)
- testing [96](#)
- viewing status [97](#)

- cases
 - creating [105](#)
 - managing [106](#)
 - records, merging duplicates [35](#)
- cloud connectors, gathering data from [32](#)
- configuration, backing up [137](#)
- connector
 - fields, mapping [147](#)
- contacts
 - creating [47](#)
 - managing [48](#)
 - records, merging duplicates [35](#)
 - vCards, creating from [49](#)
- conversion
 - Sugar edition, changing [12](#)
- copy/sync Edit and Detail Views [168](#)
- currencies, defining [137](#)

D

- Detail View
 - layout, editing [167](#)
- Developer Tools [154](#)
- diagnostics, running [95](#)
- documents
 - creating [107](#)
 - managing [108](#)
 - MS Word mail merge templates, identifying [109](#)
- drop-down lists
 - creating [177](#)
 - managing [177](#)

duplicates
records, merging 35

E

Edit View
layout, editing 167
email campaigns
executing 91
status, viewing 97
email marketing records, creating 92
email templates
files, attaching 79
images, embedding 79
emails
accounts, creating 70
accounts, managing 72
accounts, synchronizing 72
address book 76
archiving 44, 49, 57, 106
cache files, clearing 72
composing 73
creating 69, 74
folders, creating 72
managing 78
queue, managing 154
records, creating 78
settings, configuring 69, 148
templates, creating 78
employees
creating 179
managing 180
module 113
export
modules, description 156
exporting
data 117
external systems. gathering data from 32

F

fields
IFrames, embedding 170
links, embedding 170
fields, creating 161
files, attaching 83

G

Group user
definition 121
Group User, creating 123

grouped modules 28

I

images
embedding 79
importing data 115
inbound emails
managing 150
InsideView
accessing within Sugar 32
purpose 20

L

language pack
selecting 16, 120
layout options, viewing 19
LDAP authentication, enabling 126
lead forms, creating 98
leads
converting 44
creating 41
managing 43
records, merging duplicates 35
List View, editing 166
locale settings
configuring 135
viewing 19
log
settings, configure 134

M

mail merge, performing 99
meetings, scheduling 61, 65
Module
Accounts 51
Activities 59, 61, 65, 81, 83
Bug Tracker 101
Campaigns 85, 87, 89
Cases 105
Contacts 47
Documents 107
Emails 69
Employees 113
Home 39
Leads 41
Opportunities 55
options, common 26
Projects 111
module loader

- using 158
- modules
 - custom, distribution options 156
 - customized, publishing 169
 - deploy, description, modules
 - export, description 156
 - description 26
 - disabling, enabling 159
 - drop-down list, creating 177
 - editing 160
 - grouping 28
 - publish, description 156
 - relationships, creating 171
 - sub-panels, editing 164
 - tabs, configuring 175
 - tabs, hidden 175
 - uninstalling 159
- MS Windows
 - controls 15
- N**
 - newsletter
 - campaign, executing 94
 - Newsletter campaign 89
 - notes, creating 83
- O**
 - opportunities
 - creating 55, 56
 - managing 57
 - module 55
 - records, merging duplicates 35
- P**
 - password
 - changing 22
 - managing 22
 - passwords
 - LDAP authentication, enabling 126
 - managing 126
 - SAML authentication, enabling 126
 - settings 127
 - permissions, viewing 21
 - project
 - task, creating 112
 - project management
 - standard, description 111
 - projects
 - creating 111

- managing 112

Q

- Quick Create form
 - layout, editing 167
- Quick Create forms
 - enabling and disabling 176

R

- records
 - duplicates
 - merging 35
 - history, managing 31
 - managing and viewing 29
 - multiple, managing 31
- regular user, definition 121
- relationships, creating 171
- repair option 137
- reports
 - campaign ROI 98
- roles
 - viewing 21, 122
- roles, managing 123

S

- SAML authentication, enabling 126
- scheduler
 - troubleshooting tips 143
- Search form
 - layout, editing 168
- searching
 - advanced 37
 - basic 37
 - global 36
 - results, saving 38
- security timeout, about 22
- shortcut bar
 - description 183
 - managing 176
- Studio 159
 - layouts, changing tabbing order 167
 - modules, publishing 169
- Sugar
 - about i
 - accessing 16
 - configuration, backing up 137
 - core features ii
 - data, upgrading and rebuilding 137
 - documentation, accessing 129

- email settings, configuring [148](#)
- fields, managing [161](#)
- installation, custom [7](#)
- installation, typical [5](#)
- installing, prerequisites and guidelines [1](#)
- locale settings [135](#)
- module, description [26](#)
- page layout, editing [165](#)
- records, managing and viewing [29](#)
- roles, managing [123](#)
- searching in [36](#)
- uninstalling [14](#)
- updates, checking for [129](#)
- upgrading [8](#)
- user interface, configuring [130](#)
- user interface, overview [25](#)
- users, managing [120](#)
- sugar
 - upgrading, prerequisites [9](#)
- Sugar Dashlets
 - description [33](#)
 - managing [33](#)
- Sugar Feed
 - settings, configure [145](#)
- Sugar feeds [34](#)
- SugarCRM forums, about [129](#)
- system administration
 - bug tracker module, configuring [178](#)
 - configuring, advanced [132](#)
 - custom modules, uploading [158](#)
 - database collation, specifying [136](#)
 - default currency, specifying [135](#), [136](#)
 - default formats, specifying [135](#)
 - export, configuring [136](#)
 - mail merge, enabling [132](#)
 - proxy settings, configuring [132](#)
 - scheduler, configuring [139](#)
 - Skype, enabling [132](#)
 - system settings, configuring [130](#)
- system configuration
 - diagnostics [144](#)
- T**
- targets
 - creating [85](#), [87](#)
 - importing [85](#), [87](#)
 - list, creating [88](#)
- tasks
 - creating [81](#)
- Tracker Redirect URLs
 - creating [93](#)
- U**
- Upgrade Wizard, using [10](#)
- upgrading
 - converting editions [12](#)
- user interface
 - configuring [130](#)
 - overview [25](#)
- user preferences
 - viewing [18](#)
- user session rules [17](#)
- users
 - creating [121](#)
 - group user [121](#)
 - regular user [121](#)
 - roles, assigning [122](#)
- users, managing [120](#)
- V**
- vCard, importing [50](#)
- W**
- Web browser [15](#)

