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COMMERCIAL OPEN SOURCE

Sugar Community Edition
User Guide

Version 5.1 Beta1

BREAK AWAY

Sugar Community Edition User Guide
Version 5.1 Beta1, 2008

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1.The original version of this document, written for version 2.0 dated December 2004, included contributions from Long Reach Corporation.

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Preface

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

Sugar enables organizations to efficiently organize, populate, and maintain information 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 of the functionality 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 User Guide* is designed for users who are new to Sugar, or to CRM and Web-based applications. This guide introduces you to some basic CRM concepts and helps you get familiar with the Sugar system. It describes how to access Sugar through a personal computer and a Web browser to perform a broad range of customer relationship management 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 Microsoft Internet Explorer or Mozilla Firefox.

Audience

The *Sugar Community Edition User Guide* provides information for users who want to record and track company activities and outcomes. In addition, this guide provides

information for system administrators who manage user access and system configuration.

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 lifecycle, starting with generating and qualifying leads to customer support and resolving reported bugs. Because many of these steps are interrelated, 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 not only view and edit this information but also create new 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. You can also create multiple forums as platforms of discussion on various topics amongst your users and customers.

Core Features

Sales Management

- Lead, Contact, and Opportunity Management to share information and pursue new business.
- Account management to manage all customer interactions in a single location.

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 reporting to analyze the effectiveness of marketing activities

Collaboration

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

News Service

- The RSS news feeds module lets you select and manage your favorite news feeds, and display them on your My RSS News Feeds screen.

Administration

- Quickly edit user settings, views and layouts in a single location.

- Customize the application with Sugar Studio so that Sugar meets the exact needs of your company.

Interface Consolidation

The Portal module allows administrators and users to link external web sites and web applications into the Sugar user interface, enabling Sugar to become a unified information interface for its users.

Sugar is built on established open-source technologies and widely supported industry standards, including the PHP development environment, the MySQL relational database, the Apache or IIS web servers, and the Linux or Windows Server operating systems. The system supports both the LAMP (Linux, Apache, MySQL, PHP) and WIMP (Windows, IIS, MySQL, PHP) platforms.

What's New in 5.1

With each revision of the Sugar software, significant advances are made in both the feature set and usability of the software.

Enhanced Emails Functionality

With the IMAP protocol, you can limit access to specific folders on your external account.

Enhanced Import Functionality

You can now import data for the Bug Tracker. Also, you can enable the import functionality for any custom module that you build in Module Builder. You can save field mappings between the import file and the Sugar database for future use.

Creating Relationships Between Modules

You can create relationships between modules in Module Builder as well as Studio. In Module Builder, you can create relationships between two undeployed modules, and between one undeployed module and one deployed module. In Studio, you can create relationships only between deployed modules.

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. You can also embed a view of the Website itself in the layout rather than as a link by using the IFrame field.

Locking Down the Upgrade Wizard

If you are managing multiple instances of the Sugar application and you want to maintain complete control over the instances, you can lock down the Upgrade Wizard to ensure that no user with administrative privileges can upgrade any of them.

Locking Down the Module Loader

In order to ensure that users with administrative privileges do not load sub-standard modules into your Sugar application, you can lock down the Module Loader and direct them to load modules from a location of your choice.

Related Documentation

Refer to the following guides for related information:

- *Sugar Community Edition Installation and Administration Guide*: Describes how to install, set up, configure, and manage Sugar.

- *Sugar Upgrade Guide*: Describes how to upgrade to the latest version of Sugar application.

Chapter 1

Getting Started

This guide assumes that the resources needed to access the Sugar system are available to you and that you are familiar with how to use them. If you are not sure whether your system meets the requirements or how to use required third-party tools, such as a Web browser, talk to your manager or system administrator.

Topics include:

- **"Technical Requirements" on page 1**
- **"Accessing Sugar" on page 2**
- **"Setting Your Preferences" on page 3**
- **"Security Timeout" on page 7**
- **"Managing Your Password" on page 7**

Technical Requirements

Before you begin using the system, ensure that you have the required software installed and configured on your system as follows:

1. A current Web browser on your computer.

    Sugar has been successfully tested on the following browsers.

Web Browser	Version	URL
Mozilla	1.7 and higher	www.mozilla.org/mozilla 1.x
Firefox	1.0 and higher	www.mozilla.org/firefox
Microsoft Internet Explorer	5.0 and higher	www.microsoft.com/ie

    You may encounter problems if you try to access Sugar using older Web browser versions such as Internet Explorer 4 or Netscape 4.x. If you are unsure about which version you are using, click *Help > About* or similar options on the menu bar in your browser to display the version number.

2. Enable Java Script and cookie support on your Web browser.

Both Java Script and cookie support must be enabled in the security settings of your browser and is usually turned on by default. If you encounter problems accessing the system, check your browser configuration to ensure both Java Script support and cookie support are enabled as follows:

- **o**   Internet Explorer: Click *Tools > Internet Options > Privacy* and *Security* tabs,
- **o**   Firefox: Click *Tools > Options > Privacy* and *Web Features* tabs.

3.   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 the Compatibility Matrix in the Release Notes.

Web Browser and Window Controls

Sugar dynamically generates the HTML screens that the Web browser displays when you click certain buttons on a Web page. These screens may not display if you use the Web browser's Backward and Forward buttons. Therefore, it is recommended that you use the Shortcuts menu or the module tabs to navigate back and forth in the application.

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

Accessing Sugar

You access Sugar through a Web browser.

To log into the system

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

The Login window displays on the page. If the login screen does not display, verify that you have typed the URL correctly, or contact your system administrator to verify that you have the correct URL

By default, the Sugar application uses the Sugar theme and the US English language pack. For more information on themes, see "Common Module Options" on page 14.

2.   Enter your user name and password.

The system administrator assigns a user name and password to every system user. If you have not received your user name and password, contact your system administrator.

If you cannot log in, take one of the following actions as appropriate:

- **o**   Verify that the user name and password are correct, including any capital letters.
- **o**   Verify with your system administrator that you have the correct user name and password.

- Contact your system administrator to ensure that your account has not been disabled.

3. If applicable, select the language and theme that you want to use.

    You can also choose the language that you want to use when working in the system and the theme or visual appearance you want the system to have. Languages and themes can be found at http://www.sugarforge.org/.

4. Click **Login**.

    The time zone drop-down list displays on the page.

5. Select your time zone from the drop-down list and click **Save**.
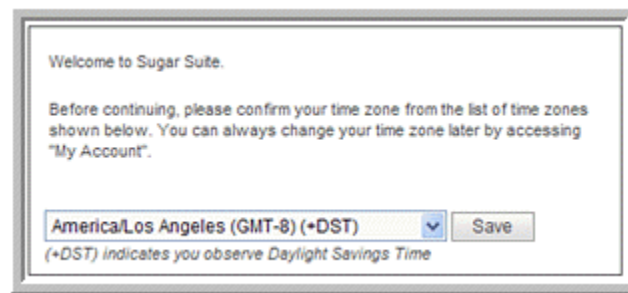
The Sugar Home page displays on the page. The figure below illustrates the default Sugar theme. For an overview of the Home module as well as other modules, see "Sugar Modules" on page 12.
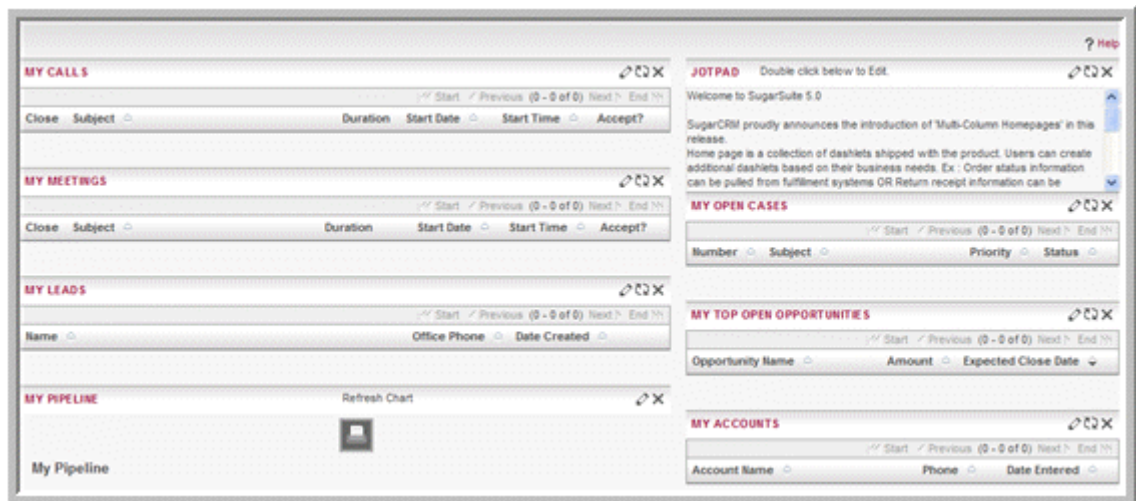

Setting Your Preferences

Typically, the administrator configures the system settings for all users in the organization. This includes user profile information, password, Email settings, calendar settings, as well as specifying the module tabs to display to all or some users in the organization.

On your My Account page, you can view the settings that the administrator has configured for you. This includes your contact information, locale settings, and your Sugar module privileges.

As a user, you can edit some of these settings, such as your contact information and layout options to configure your system to suit your requirements. However, you cannot display modules that the administrator has hidden from your view.

By default, individual module tabs display in the user interface. However, if you are using the Sugar theme, you can display group tabs instead. Group tabs, configured by the administrator, organizes module tabs into groups according to your organization's requirements. For example, the tabs for contacts, leads, and opportunities can be displayed under the Sales group tab. You can choose to display individual module tabs or group tabs. See "Layout Options" on page 6 for more information.

The screenshot below displays the default group tabs and the module tabs grouped under the Sales group tab.
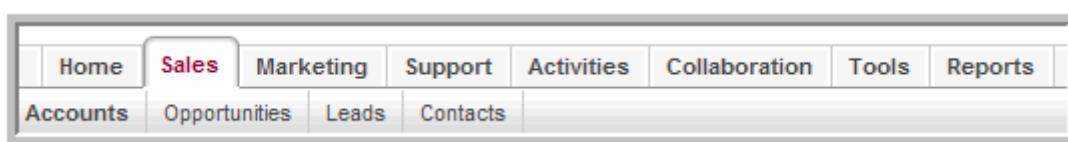
To revert to the default system settings, click the **Reset to Default Preferences** link on the My Account page. Note that you will lose your customized settings when you do this.

To set or edit your profile and preferences

1. Click the My Account link located at the top right side of the page.
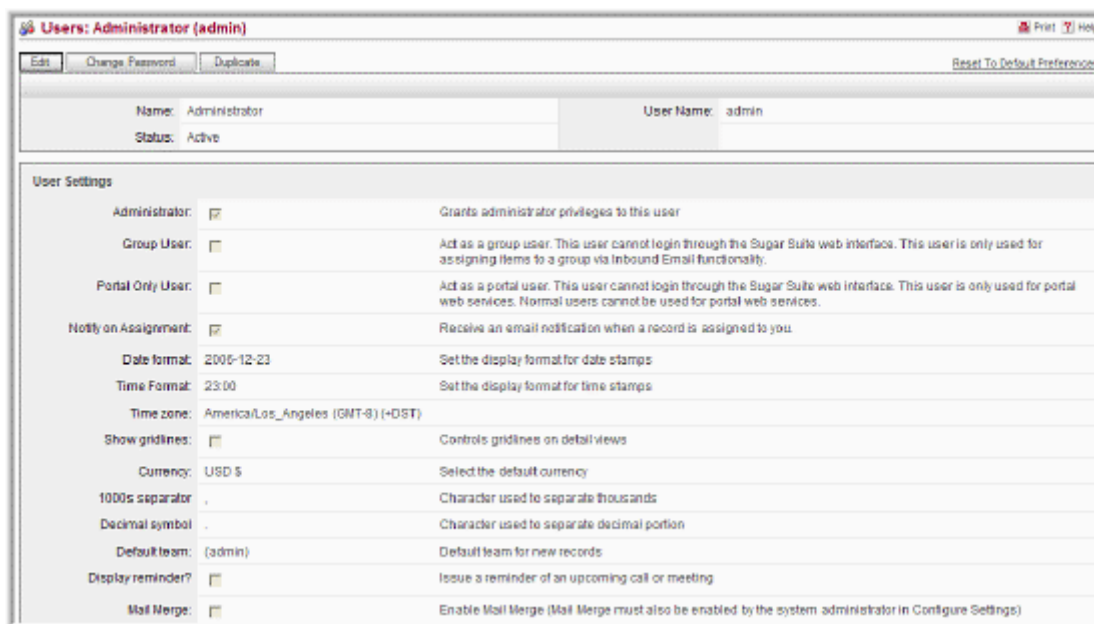
The Duplicate button displays only when an administrator logs in because only an administrator can duplicate records. Duplicating records is a quick way to create a new record. You can create a duplicate record and then edit it and save it as a new record.

2. To edit the user profile or change your preferences, click the **Edit** button.

In the Edit view, you can define or edit information in the following panels:

Header Information

You can edit your name, status, and user name.

User Settings

Use this panel to view your privileges and system settings that the administrator has configured. You can change some settings such as whether you want to be notified when you have been assigned a record for action. When you enable the Notify on Assignment option, you will get 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

Knowledge Base

Campaigns

Projects

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 export data from Sugar. However, you can override the administrator's settings with your own. The default character set to export data is CP1252. If your locale is not US or Western Europe, you must specify the appropriate character encoding for your locale. 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. So, users in this locale will need to select SJIS as the default export character set instead of CP1252.

This character encoding setting is also used when importing data into Sugar.

If you are an administrator, you can also assign yourself to the role of a Group User or Portal User through the User Management option on the Administration Home page.

Locale Settings

Use this panel to configure settings such as the time zone, date format, currency, and name display format.

User Information

Use this panel to enter your work and contact information such as your title, department, phone numbers, and one of the following Instant Messenger (IM) services: MSN, Yahoo, or AOL.

Address Information

Use this panel to enter your primary address such as your home address.

Calendar Options

Use this panel to create a Publish Key. You can provide this key to users of other applications such as Microsoft Outlook if they want view your calendar. Sugar restricts access to your calendar to individuals who can provide this key.

Layout Options

Use this panel to specify the order in which module tabs display when you log into the Sugar application. You can also hide modules that you do not need to use. By default, you have access to all the modules. To move up a module, select the module in the Display Tabs list and click the Up arrow; to move down the module, click the Down arrow.

To hide a module, move the module tab to the Hide Tabs list using the right arrow. Similarly, to display a module, use the left arrow to move it from the Hide Tabs list to the Display Tabs list.

If you log in as the administrator, you can apply these settings globally by moving the modules from the Hide Tabs list to the Remove Tabs list. Any module in the Remove Tabs list is hidden not only from you but from all users in your organization. You can specify the maximum number of module and sub-module tabs to display. You can display the Last Viewed bar on the side or on the top. Use the Number of tabs to display box to specify the maximum number of module tabs to display in the User Interface.

Note:	You cannot hide the Home module.

By default, module tabs are displayed individually in the user interface. However, if you are using the Sugar theme, you can organize module tabs under group tabs. To group them, select Grouped Modules from the Navigation Paradigm drop-down list. To ungroup them, select Modules.

Email Options

Use this panel to specify your Email options such as your Email address and the Email client. You create mail accounts in the Emails module. For more information, see **"Configuring Email Settings" on page 66**.

You can choose the SugarCRM mail client, or an external mail client such as Microsoft Outlook. The default is the SugarCRM mail client.

To set your Email address, do the following:

a. Click **Add Address** and enter your Email addresses in the field above.

b. Specify whether it is the primary Email address or the reply-to Email address used to send an automated response to Emails.

c. From the Email client drop-down list, select the Email client of your choice.

3. Click **Save** to save your changes; click **Cancel** to exit without saving the changes.

To revert back to the default settings, click the **Reset to Default Preferences** link at the top right corner of the detail page and click **OK** to confirm your action.

Security Timeout

For security reasons, the system automatically logs you out of the system 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).

Therefore, if you do not perform any tasks for a certain time period, the system may log you out either because the browser session timed out or because PHP session timed out.

When you are ready to resume working with the system, click any button on the screen. The system automatically loads the Login page for you. You can also close the Web browser windows and re-load the Login page manually in a new browser window.
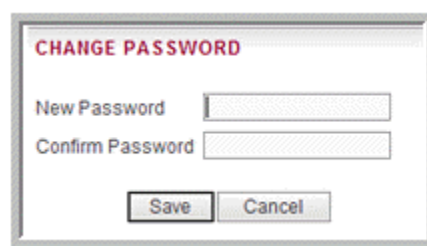
Managing Your Password

When you are first granted access to the system, your administrator will provide you with a password. For security reasons, it is recommended that you change this password. 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 the **My Account** link that displays at the top right of your screen.

2. On the My Account screen, click **Change Password**.

In the Change Password dialog box, enter your new password in the New Password box, and again in the Confirm Password box.

3. Click **Save** to change the password.

If you forget your password, contact your system administrator for a new password that you can use temporarily. You can then log into the system, and change the password to one of your choice according to the procedure described above.

Chapter 2

Navigating the User Interface

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

Topics are as follows:

- "Overview of the Sugar User Interface" on page 9
- "Viewing and Managing Record Information" on page 15
- "Managing Sugar Dashlets" on page 18
- "Merging Duplicate Records" on page 20
- "Searching for Information in Sugar" on page 22

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. Each module, representing a record type, groups the tools and functions needed to perform specific tasks. This enables you to work more efficiently.

Record types can be related to one another. For example, a contact can be related to a specific account. When you view a specific record in Sugar, the system also displays related records. Therefore, when you view a specific account, information on the relatedcontacts are displayed in a sub-panel.

When you log in, the Home module displays on the screen. Tabs for other modules display alongside the Home tab.
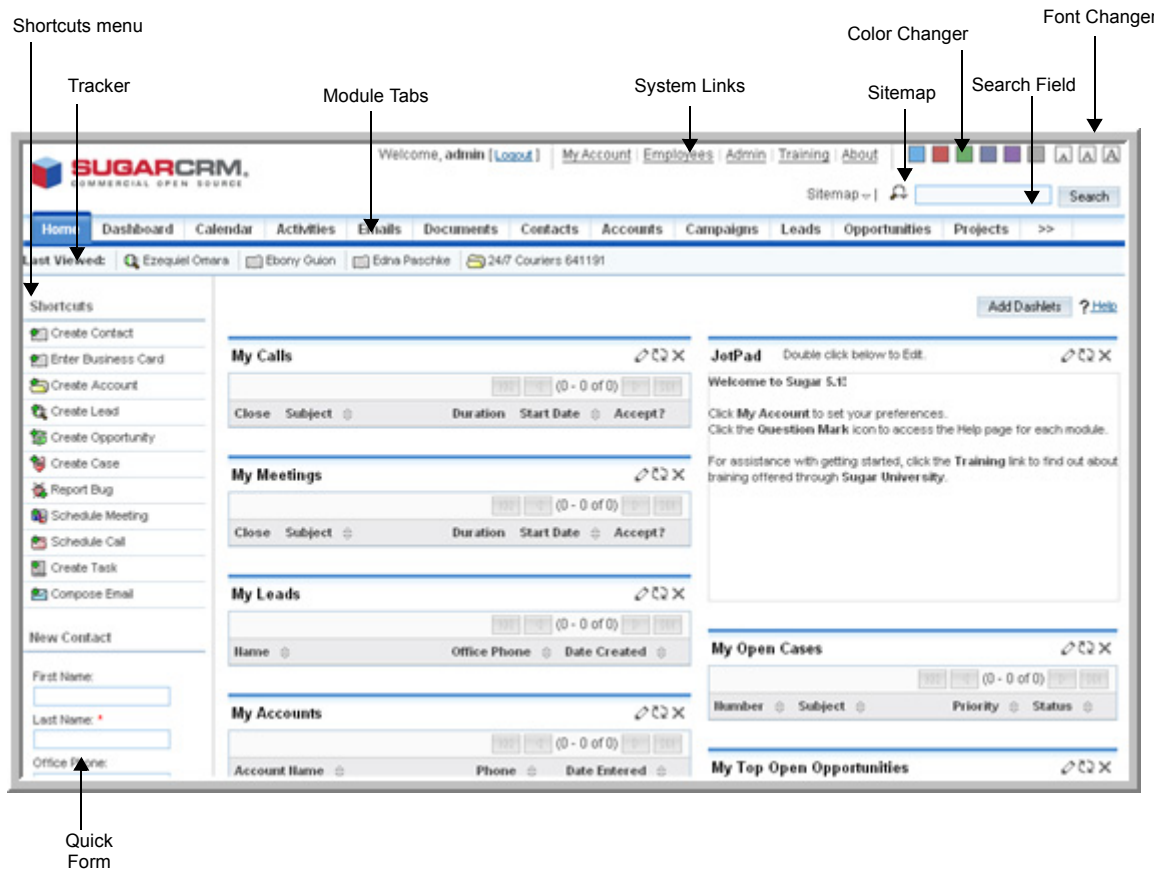
The Home module displays the following:

- **System links**. System links, located at the top right-hand corner of the page, are common to most modules. They allow you to access your profile information, Sugar University, the employee list in your organization, Sugar version information, and log out of the system. Administrators can view and access the Administration Home page to perform their tasks. For more information, see "System Links" on page 11.

- **Color Changer**. To change the page color, click the desired color option located next to the About link at the top of the page.

- **Font Changer**. To increase or decrease the font size on the page, click the appropriate font option located next to the Color Changer.

- **Sitemap**. The Sitemap enables you to view how Sugar modules are organized. Click the Down arrow to view the map. You can navigate to a page by selecting it from the list.

- **Global Search**. To perform a global keyword search at the system level, enter the keyword in the Search field. For more information, see "Global Search" on page 22.

- **Module tabs**. These tabs enable you to access a module to view, create, and manage records. For more information, see "Sugar Modules" on page 12.

- **Last Viewed links**. These links provide a trail of pages that were lasted viewed. For more information, see "Common Module Options" on page 14.

- **Shortcuts**. This menu allows you select options to view, create, and import item records. For more information, see "Common Module Options" on page 14.

- **My Sugar**. This tab displays a summary of your customer-related tasks and activities in the form of dashlets. Dashlets are user-configurable panels on the Home page that allow you to specify the items that you want to view on your home page. For more information, see "Managing Sugar Dashlets" on page 18. You can click the down-arrow on the tab to access options to rename the page, add a dashlet, and change the page layout.

- **New Contact**. This quick form allows you to enter the required information to create a new contact. For more information, see "Common Module Options" on page 14.

Note: If you are using the Sugar theme or the Bold Move theme, you can change the color and font size in Sugar by clicking the appropriate box located next to the About button at the top of the page.

System Links

All modules, including the Home module, display most of the following system links:

My Account. Click this link to enter or edit your profile information such as a change in home address, Email address, or phone number. For more information, see "Setting Your Preferences" on page 3.

Training. Click this link to view Sugar University, which offers you a self-paced training program to learn how to use Sugar.

Employees. Click this link to view a list of other users in your organization. This list, maintained by the administrator, displays employee information such as name, department, supervisor, and Email address. You can click an employee's name or a supervisor's name to view detailed information on that individual. You can click an employee's Email address to send an Email to that person.

Administrators can create new employee records. Users can view a list of all employees, search for specific employees, and change an employee's status to Active or Inactive.

Every user in the system has an attached Employee record. However, not every employee has a User record.

For more information, see "Employees Module" on page 116.

Admin. The Admin link is only visible to users who have administrator privileges. Administrators can select this option to perform tasks such as managing system and user settings. For more information, see the chapter on System Administration.

Logout. Click this link to log out of the system. It is recommended that you always log out of the system instead of only closing your Web browser. When you log out, the system performs several clean-up procedures, and then automatically returns the Web browser window to the Login screen.

> **About**. Click this link to learn more about SugarCRM and view version information. This link also provides credits and valuable source code references.

Sugar Modules

Sugar displays a maximum of 12 module tabs on the screen. To view a specific module, click the appropriate tab. To view any of the remaining modules, click the **>>** arrow that displays on the right and select from the drop-down list. When you select a tab from the drop-down menu, it replaces the tab that previously displayed to the right.

Note: Not every module has a separate tab. For example, the Notes, Emails, Tasks, Calls, and Meetings modules are all grouped together in the Activities module.

The core Sugar modules are as follows:

- **Home**. The Home module provides a quick overview of your customer-related tasks and activities. For more information, see "Home Module" on page 28.

- **My Portal**. Click this tab to view the My Portal module. You use this module to create shortcuts to one or more Web sites. This is commonly used to include Email, forums, or other Web-based applications, enabling Sugar to become a single user interface for multiple applications. For more information, see "My Portal Module" on page 30.

- **Calendar**. Click this tab to view the Calendar module. You 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" on page 32.

- **Activities**. Click this tab to view the Activities module. You use this module to create or update scheduled activities, or to search for existing activities. Activities consist of the following:

  - **Calls** allow you to track all of your phone calls with leads and customers.

  - **Meetings** allow you to schedule internal or external meetings, as well as receive meeting invitations from others.

  - **Tasks** are for tracking any action that needs to be managed to completion by a due date.

  - **Notes** allow you to capture note information as well as upload file attachments.

  - **Emails** allow you to archive sent or received Email messages. If you use Microsoft Outlook, you can quickly archive Email messages with the Sugar Plug-in for Outlook.

    For more information, see "Activities Module" on page 35.

- **Contacts**. Click this tab to view the Contacts module. You use this module to track people involved in doing business with your organization. You can track a variety of contact information such as title, Email address, and phone number. Contacts are usually linked to an account, although this is not required. For more information, see "Contacts Module" on page 42.

- **Accounts**. Click this tab to view the Accounts module. You use this module to manage your customers. You can track a variety of information about an account including Web site URL, address, number of employees and other data. Business subsidiaries can be linked to parent businesses in order to show relationships between accounts. For more information, see "Accounts Module" on page 47.

- **Leads**. Click this tab to view the Leads module. You use this module to track individuals or companies who are potential customers. Leads are typically fed into the Sugar system automatically from your Web site, trade show lists or other methods. However, you can also manually enter leads into Sugar. For more information, see "Leads Module" on page 50.

- **Opportunities**. Click this tab to view the Opportunities module. You 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" on page 54.

- **Cases**. Click this tab to view the Cases module. You 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 a full trail of all related open and completed activities. For more information, see "Cases Module" on page 57.

- **Emails**. Click this tab to view the Emails module. You use this module to send and receive Emails. You can also automate Email management, create Email templates for automated replies and for Email-based marketing campaigns. For more information, see "Emails Module" on page 65.

- **Bug Tracker**. Click this tab to view the Bug Tracker module. You 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, its resolution, the user assigned, the release of software involved, its type (defect or feature) as well as a full trail of all related open and completed activities. For more information, see "Bug Tracker Module" on page 59.

- **Documents**. Click this tab to view the Documents module. You use this module to view a list of documents that you can download. You can also upload your own documents, assign publish and expiration dates, and specify which users can access them. For more information, see "Documents Module" on page 62.

- **Campaigns**. Click this tab to view the Campaigns module. You use this module to create and manage marketing campaigns. You can implement and track marketing campaigns. Campaigns may be telemarketing, mail or Email-based. For more information, see "Campaigns Module" on page 84.

- **Projects**. Click this tab to view the Projects module. You use this module to track and manage tasks for multiple projects. Tasks can be assigned to different users and assigned estimated hours of effort. As tasks are in progress and completed, users can update the information for each task. For more information, see "Projects Module" on page 106.

- **RSS**. Click this tab to view the RSS (RDF Site Summary) module. Use this module to view and manage news and other Web content syndicated by Web sites.

View the latest headlines provided by your favorite RSS feeds. These feeds provide news or other web content that is distributed or syndicated by Web sites. The system provides hundreds of RSS feeds, and you can easily add others. For more information, see "RSS Module" on page 110.

- **Dashboard**. Click this tab to view the Dashboard module. Use this module to view a chart of your opportunities pipeline. For more information, see "Dashboard Module" on page 111.

In addition to the core modules, your organization can purchase and install the following module:

- **Forums**. Click this tab to view the Forums module. Use this module to create one or more forums to discuss general, technical, or sales topics. For more information, see "Forums Module" on page 114.

Common Module Options

Most modules display the following options:

Search Box: A Search box for global search displays above the module tabs. For more information, see "Global Search" on page 22.

To perform an advanced search with more filters, click the **Advanced Search** link below the Search box. For more information, see "Advanced Search" on page 24.

Last Viewed: The bar below the Search box displays a useful trail of recent records that you have viewed. Administrators can view a trail of all users who recently viewed records.

Shortcuts: Displays options to perform necessary tasks in one or more modules. The options vary depending on the module you select.

Quick Form: A quick entry form to create a new record for the module. This form differs from the fields displayed when you select the Create option in the Shortcuts menu. A quick form only displays required fields to create a new record and uses default values where available. After you save the new record, you can change the default values if necessary and enter information for the optional fields.

Theme. A theme specifies the appearance of the User Interface such as page formatting, fonts and colors. Sugar provides several themes. The default theme is named Sugar. At the bottom of every page, you have an option to select a different theme from the Theme drop-down list.

If you have installed a different language pack, you can select it from the Language drop-down list. The default language is US English.

Print. Click this option to view a printable version of the page. You can then print it using your browser's Print option.

Help. Click this option to view information about the page.

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, in table format, links to individual records. The list view also displays, in columns, other relevant information such as names, Email addresses, phone numbers, and account names for each record. You can click a record name to drill down to its detail information. You can click the view icon to navigate to the detail view and the Edit icon to navigate to the edit view, if you have edit permissions.

You can change the default view by adding or removing columns depending on the information that you want to view. For more information, see .

The system paginates long lists. To sort the list, click any column title which has the icon beside it; to reverse the sort order, click the column title again.

Detail View: The Detail View displays the detail page with all the available information for a record such as name, modified date, and related records. The related records are displayed in the appropriate sub-panels. The detail page provides options to edit, delete, and duplicate record information. Similarly, you can create, edit, and delete related records that displays in the sub-panels.

Edit View: The Edit View allows you to revise the information that you viewed in the detail view.

To view and edit record information

1. Point the cursor on the down arrow adjacent to the record name.

   The address displays in the Additional Details popup window. In this window, you can click the **View** icon to navigate to the record's detail page, or click the **Edit** icon to navigate to the record's detail page and edit the information.

   Alternatively, click the record name on the list to view its details.
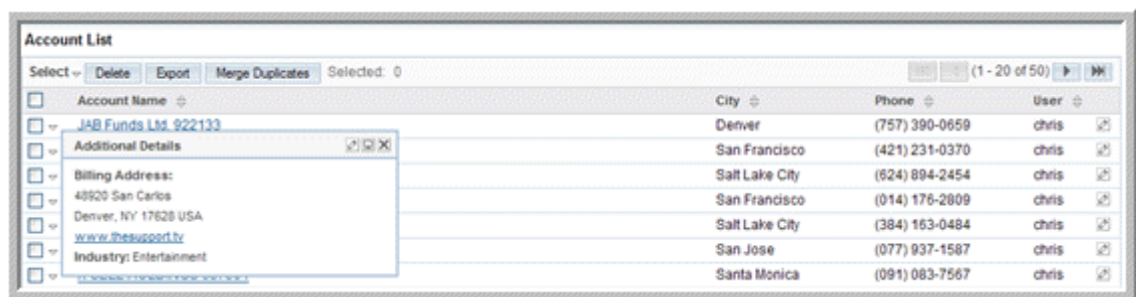
The detail page displays related information in sub-panels.

For example, the detail page of an account display sub-panels for related activities, opportunities and so on. Each sub-panel consists of rows to list multiple records. You can add more records to the list, if necessary.

2. To edit or remove a record, click the corresponding **edit** or **rem** icon respectively.

    You can minimize sub-panels or reorder them as needed.

3. Make the necessary changes and click **Save**. To exit the Edit view without saving your changes, click **Cancel**.

To manage related information in sub-panels

- To minimize a sub-panel, click the arrow icon that is located next to its name. The sub-panel records no longer display but the sub-panel name and the arrow icon are still visible; to display the sub-panel, click the arrow icon again.

- To move a sub-panel to a different location on the page, place the cursor on the arrow icon, hold down the cursor, drag the panel to the new location and release the cursor.

- To create a new record, click **Create** above the sub-panel; 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**.

The system adds the records in the sub-panel. This feature enables you to quickly associate multiple records; for example, you can associate multiple contacts with an account.

The screen below displays available records for the Contact sub-panel in an account.

Tracking User Activity

Users can view a history of their actions on the tracker bar located below the module tabs. When you log into Sugar, the tracker bar displays breadcrumbs of all records that the you viewed when you last logged into the system. You can click on a breadcrumb to access that record again.

Both users and administrators can also create reports to track information such as how many modules were accessed, how many files were modified and so on. For more information, see

Tracking and Managing Record History

The detail 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 the 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 view a summary of all the listed records in a separate window, click **View Summary**.

3. To edit or delete a record, click the appropriate **edit** or **rem** icon respectively.

4. To archive an Email related to the record, click **Archive Email**. For more information, see "Archiving Emails" on page 80.
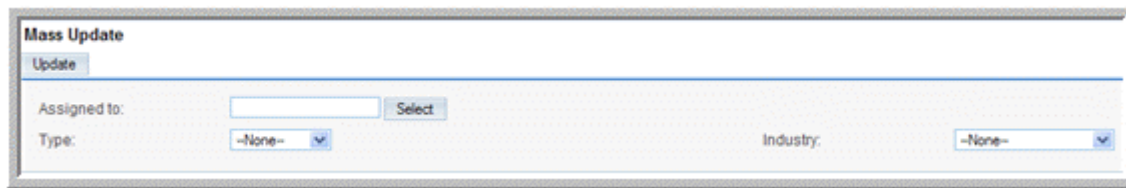
Editing and Deleting Multiple Records

Most of the modules provide a Mass Update sub-panel on their home page that enables you to simultaneously edit or delete some or all of the listed records. This feature is useful to update information shared by several records. The fields that you can edit vary depending on the module. For example, in the Contacts module you can select some or all of the listed contacts and change their account name.

To edit or delete multiple records

1. To edit information, on the module's home page, select the checkboxes of the records you want to edit.

2. In the Mass Update sub-panel, enter the revised values for the desired fields and click **Update**.

   The system updates the information in all the selected records.

The screenshot below displays the Mass Update panel of the Accounts module.

3. To delete records, select the checkboxes of the records and click **Delete**.

   The system deletes the record from the module.

Managing Sugar Dashlets

Dashlets are user-configurable panels on the Home page that allow you to specify the items that you want to view on your home page. A dashlet displays a list of item records that is similar to the list view displayed on a module's home page. Sugar displays a collection of dashlets for items such as meetings, activities, and accounts on your home page. You can configure each dashlet to display the rows, columns, and filters that you need. For example, you can change a dashlet's title or choose to view only your items. You can add and remove dashlets as needed.
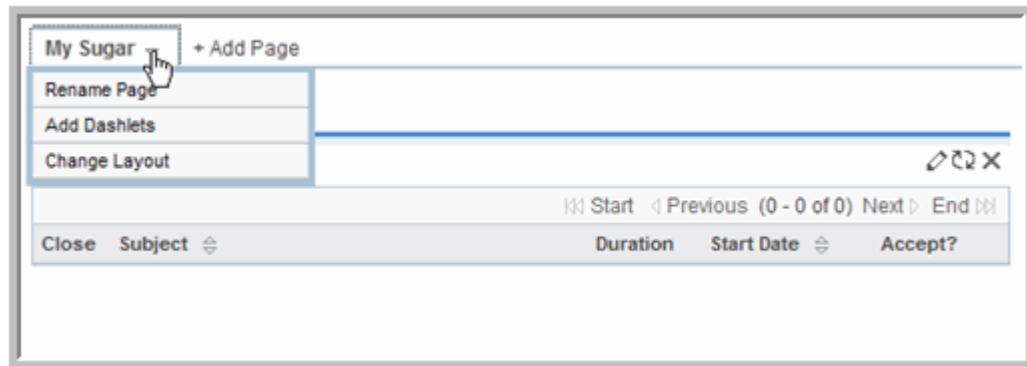
You can add multiple dashlets of the same kind. For example, you can add multiple activity dashlets and configure each one differently. By default, you can add a maximum of 10 dashlets on your home page, but the administrator can change this setting. You can also move a dashlet to different locations on the page as required.

Note: If you cannot add or move dashlets, check with the administrator to ensure that the functionality has been enabled.
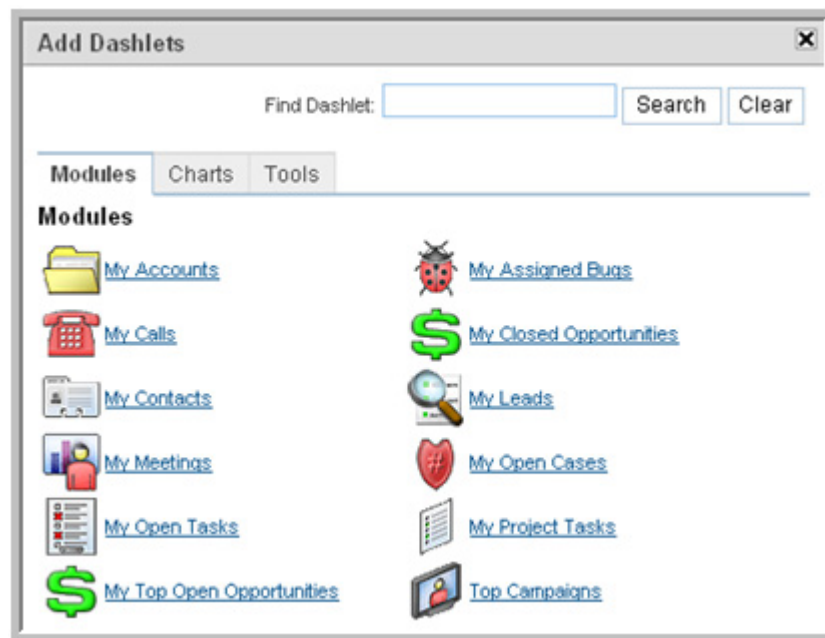
Developers can extend its functionality to provide users with additional capabilities.

To add and search for dashlets

1. Click the Down arrow on the My Sugar tab and select **Add Dashlet**.

The Add Dashlets menu displays in the separate window.

2. To add a module as a dashlet, click the module on the Modules tab.

   You can add multiple dashlets of the same type and configure each other differently.

3. To add a chart as a dashlet, select the chart from the Charts tab. The Charts tab displays dashboard charts .

4. To add the Jot Pad as a dashlet, select it from the Tools tab.

5. To search for a dashlet, enter a keyword in the search box located above the dashlet tabs and click the **Search** icon.

   The search results display on the Search Results tab.

To rearrange and customize dashlets

1. To rearrange the position of a dashlet on the Home page, point the cursor at the dashlet title, drag it to its new position and release.

2. To customize a dashlet, click the **Edit** icon adjacent to its name.

    The properties dialog box displays in a separate window.

To manage dashlets

1. To move a dashlet, place the cursor on its title, press and hold down the mouse button and move it to the new location, and then release the mouse.

2. To edit a dashlet, click the **Edit** icon above it, update the information, and click **Submit**.

3. To remove a dashlet, click the **Delete** icon above it. When the system displays a message seeking confirmation, click **OK** to confirm its removal.

4. To refresh a dashlet, click the **Refresh** icon.

Merging Duplicate Records

You can merge duplicate records into a single record to update and clean up 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 duplicate 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 so from the module's list view. If you need to search for duplicates of a record and then merge them, you can do it from the record's detail view.

To merge duplicate records from the list view

1. On the module's home page, select two or more duplicate records and click the **Merge Duplicates** link. Alternatively, on the detail page of a record, click **Find Duplicates**.

    The Merge Records page displays fields from primary record on the left and fields from the duplicate records on the right. The system highlights primary record fields that have different values from the duplicate records.

> **Note:** The system treats the first record that you select as the primary record but you can change to a different record.

The system uses a line to demarcate fields that have different data from the fields that have identical data. Fields that have differing data display above the line.

   a. To specify one of the duplicate records as the primary record, click **Set as Primary** above the duplicate field.

      The system moves that record to the left.

   b. To replace a field in the primary record with a field from a secondary record, use the << button.

2. Click **Save Merge**.

The system 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. From the list view, click a record to view its detail page.

2.   Click **Find Duplicates**.

Next, set filters 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.

3.   Select one or more filters and click **Next Step**; to remove a filter, click the Trash icon next to the field name.

The search results display all the records that contain duplicate information for the specified field.To view the details of a record, click its name in the search results.

4.   Select the records that you want to merge and click **Perform Merge**.

The Merge Records page displays on the screen.

5.   Merge records as described in "To merge duplicate records from the list view" on page 20.

Searching for Information in Sugar

You can search for information across Sugar or restrict it to a specific module. You can also perform a quick search for a specific field value.

You can perform the following types of searches in Sugar:

● Global Search

● Basic Search

● Advanced Search

Global Search

You can perform a global keyword search at the system level for text that matches the beginning of key field names.

All searches in Sugar automatically append 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".

Depending on your database configuration, global searches may or may not be case-sensitive. In general, global searches on Sugar installations running on the MySQL database are not case-sensitive and those running on Oracle are case-sensitive.

To perform a global search, enter the keyword in the Search field and click **GO**. The systems searches Accounts, Contacts, Leads, Opportunities, Cases, and Projects and displays search results for each of these modules. If you want to search only some of these modules, click the down arrow and select the modules from the list and then click **GO**.

The module with the most records displays at the top of the search results page
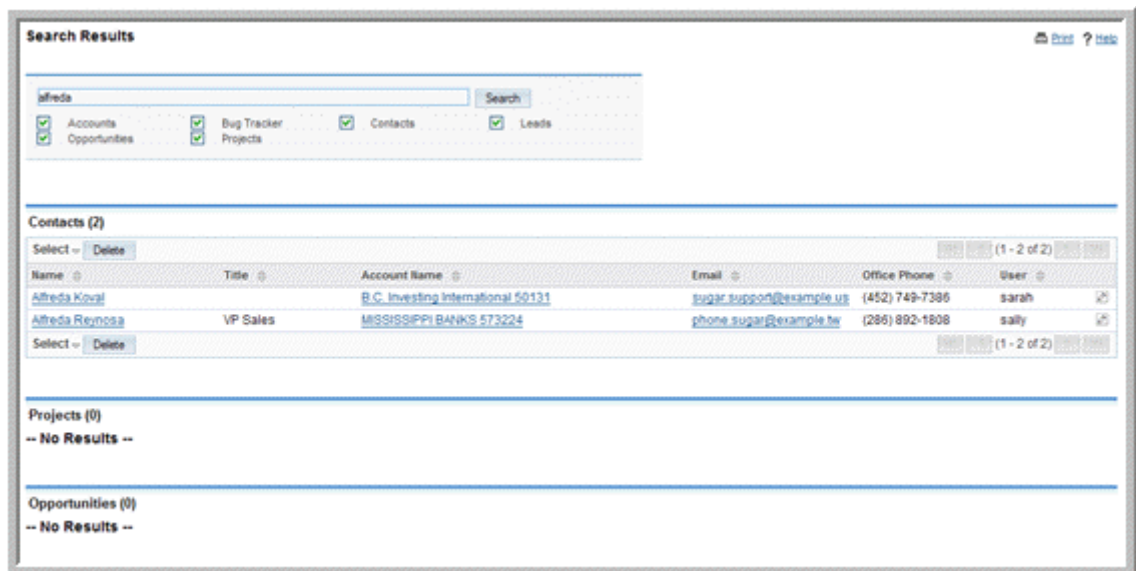
Basic Search

You can perform a basic keyword search within most modules. To perform a basic search, in the Search sub-panel on the module's home page, enter values for one or more fields and click **Search**.

To find only records that are related to your tasks and activities, select the Only My records box.

The search fields are context-sensitive and vary depending upon the module you are searching. 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 resulting list.

Text entered in search fields needs to match from the beginning of the value stored in each record unless the wildcard character is prepended. If text is entered in more than one search field, then a record must match on all those fields to be included in the filtered list. In other words, searching for "fred*" would only match first names like "Fred*erick" or other "Fred" names containing the asterisk (*) character.

These rules are also applicable to advanced search.

You can edit or delete records in the search results as described in .

Advanced Search

To further filter the search results, click the **Advanced** link below **Search**. The fields that Advanced Search displays varies depending on the selected module. Advanced Search also provides the option to save search criteria and related search results as Saved Search.

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

Saving Search Results and Layout

Using the Saved Search and Layout option, you can specify the information that you want to find as well as 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, and assigned user. You can also sort the results in ascending or descending order.

You can save an unlimited number of search results. Saved searches display in the Select drop-down list, with the last saved search at the top of the list. You can access saved search results from the drop-down list in the Shortcuts menu.

To save and manage search results

1. Enter a name for the search results in the Save this View as ? field and click **Save**.

2. The name now displays in the Saved Searches drop-down list adjacent to the Clear button.To view a saved search, select it from the Saved Searches drop-down list.

   The system displays the results below.

3. To update the criteria of a saved search, select the saved search from the drop-down list, enter the new criteria in the fields above, and click **Update**.

4. To delete a saved search, select it in the Saved Searches drop-down list, click **Delete,** and then click **OK** to confirm the deletion.

5. To add a column to List View, select it from the Hide Columns list and use the left arrow to move it to the Display Columns list.

6. To remove a column from List View, select it from the Display Columns list and use the right arrow to move it to the Hide Columns list.

7. To edit or delete multiple records in the search results, use the Mass Update sub-panel as described in .

Chapter 3

Using Sugar

This chapter describes how to use Sugar to manage information on customer accounts and contacts, sales leads and opportunities, plus activities such as calls, meetings, and assigned tasks.

The Sugar application consists of several interlinked modules. Typically, each module represents a specific type of record such as contacts or accounts. For each record type, you can create one or more records. For example, in the Accounts module, you can create individual accounts for your customers.
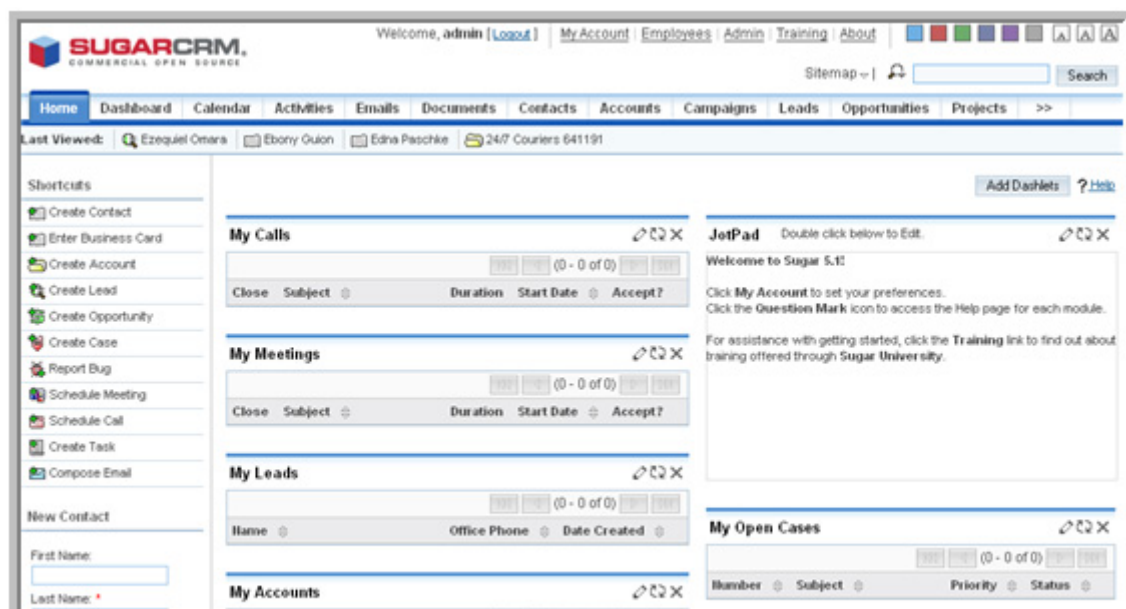
Each of these modules is described in this chapter.

Topics include:

Home Module

When you log into Sugar, the Home module displays on the screen. Tabs for other modules display alongside the My Sugar tab.

 By default, the Home page displays the dashlets listed below. You can remove the ones that you do not need and add other dashlets.

My Calls. Lists phone calls set up by you or others.

My Meetings. Lists invitations to meetings set up by you or others.

My Leads. Displays a list of leads that you 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.

My Accounts. Displays accounts assigned to you by yourself or other users.

My Open Cases. Displays a list of customer issues assigned to you for resolution.

Jot Pad. An area to jot down reminders to yourself or other comments.

My Pipeline. Displays a chart of your sales opportunities based on the cumulative amounts for selected sales stages. This chart, based on a Sugar predefined report, displays only when the expected close date is within the specified date range.

To modify a sales stage or the time period, click the **Edit** icon. When you modify this information, the pipeline chart changes accordingly.

To refresh the view after an update, click the **Refresh** icon.

The Home page also provides a Shortcuts menu which lists options to create activities and records.

You can add additional dashlets to your Home page as described in "Managing Sugar Dashlets" on page 18. You can revert to the default Home module setting at any time.

However, note that doing so will delete any new dashlets that you added to the Home module.

To revert to default Home page settings

1. Click the **My Account** option located at the top right-hand corner of the page.

2. Click the **Reset To Default Homepage** option, and click **OK** to confirm the action.

    The system resets the Home page and logs you out of the system.

3. Log back into the system to view the changes.

My Portal Module

Use the My Portals module to add links to Web sites and Web-based applications such as forums or the Web interface to your organization's Email system. Adding portal sites in Sugar enables the system to provide a single interface for multiple applications and Web sites.

A portal site can be either of two types: Personal or Global. A personal site is a link that only you can view and access. A global site is a link that the entire organization can view and access. Users can only add sites for personal use. Administrators can add personal sites as well as global sites.

A portal site can display as an option in the Shortcuts menu or as a tab adjacent to the module tabs. Users can display sites only as shortcuts. Administrators can display sites both as shortcuts and as tabs.

You can also hide these portal links, if needed. For example, if you have a long list of sites, you can hide the ones that you do not use very often.
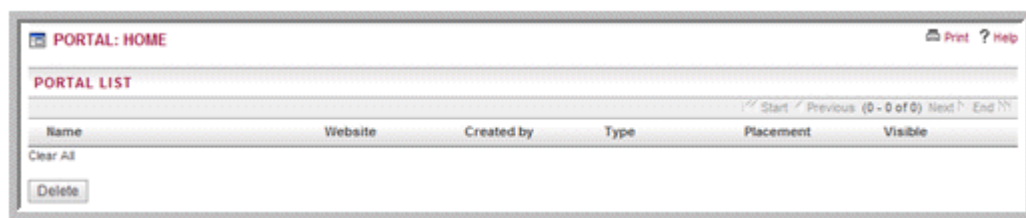
To add a portal site

1. In the Shortcuts menu of the My Portal module, click **Add Site**.

2. Enter information for the following fields:

    Name. Enter a name for the portal.

    Website. Enter the URL for the portal Website.

    Visible. By default, this box is selected to display the site link as specified in the Placement field. Deselect this box if you do not want to display the link.

    Placement. By default, this portal site appears in the Shortcuts menu. As an administrator, you can display it as a shortcut, as a tab, or as both.

    Type. By default, the site is classified as a personal site. As an administrator, you can specify a personal site or a global site.

3. Click **Save** to create the portal; click **Cancel** to go back to the Portal home page without creating the new site.

To manage portal sites

- To view detailed information on a portal site, click its name in the Portal list.

- To edit information, make the changes on the detail page and click **Save**.

- To view a portal's target web site, click the portal name in the Shortcuts menu.

- To delete a portal site from the list, select the checkbox adjacent to its name in the list and then click **Delete**.

- To navigate back to the Portal home page from a portal site page, click **List Sites** in the Shortcuts menu.

Calendar Module

Use the Calendar module to view and to create activities such as appointments, calls, meetings, and tasks.
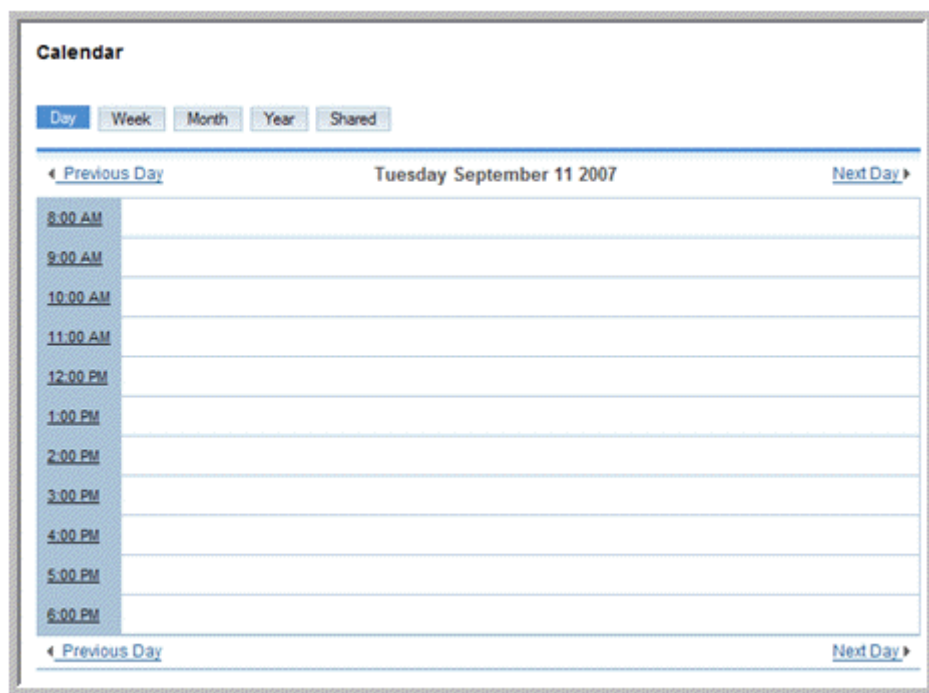
To view your calendar by day, week, month or year, click the appropriate button at the top left of the main screen. In each format, any planned activities with associated dates are displayed – such as Calls, Meetings, Tasks, Notes and Emails. Icons are used to indicate the type of activity: ▦ for a call, ▤ for a task, and ▣ for a meeting. You can click any activity on your calendar to edit the information.

You can move backwards and forwards in the calendar- by one day, week, month or year. In the week, month or year format, you can click on any date to view it in day format.

In the Calendar Options sub-panel of your My Account page, you can create a Publish Key to allow users of other applications such as Microsoft Outlook to view your calendar. For more information, see "To set or edit your profile and preferences" on page 4.

The Shortcuts menu of the Calendar Home page displays the following options that are part of the Activities module:

Schedule Call. Click this option to schedule a call as described in "To schedule a call or a meeting" on page 36.

Schedule Meeting. Click this option to schedule a meeting as described in "To schedule a call or a meeting" on page 36.

Create Task. Click this option to create a task as described in "To create a task" on page 39.

Calls. Click this option to view and manage calls as described in "To manage activities" on page 38.

Meetings. Click this option to view and manage meetings as described in "To manage activities" on page 38.

Tasks. Click this option to view and manage tasks as described in "To manage tasks" on page 40.

For any scheduled call or meeting you can create a related note or attachment. For example, you can add a note summarizing the outcome of a call or a meeting.

You can also perform other activities related to a call or a meeting, such as creating a task and archiving Emails. For more information, see "Activities Module" on page 35.

In Day format, the calendar lists the hours of the day vertically. A list of existing tasks displays on the right side of the main calendar body. To view the details of a task, click its subject title.

Click on a specific time to schedule a call or a meeting at that time.

When you save the information, the system displays the detail page where you can view and manage related information such as contacts and notes.
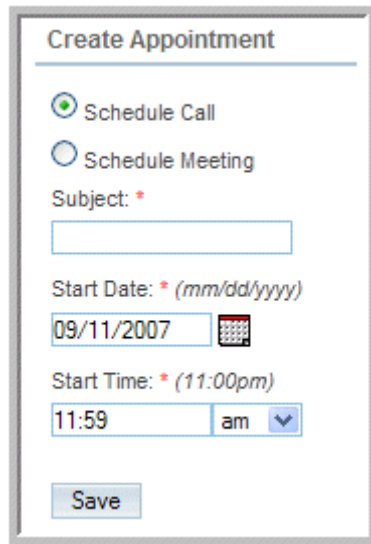
Creating Appointments

On the Calendar home page, you can use the Create Appointment form to quickly schedule a call or a meeting. This form only displays the required fields. You can add information for fields after you save the form.

Alternatively, you can use the **Schedule Call** and **Schedule Meeting** options in the shortcut section as described in "To schedule a call or a meeting" on page 36.

To create an appointment

1. In the Create Appointment form, select **Schedule Call** or **Schedule Meeting**.

2. Enter the subject of the call or meeting.

3. Click the **Calendar** icon and select the scheduled date; enter the time in the **Start Time** field below.

4. Click **Save**.

    The Calls detail page or the Meeting detail page displays the information that you entered.

5. To add or change information, click **Edit**. For more information, see "To manage activities" on page 38.

Activities Module

An activity can be any interaction with colleagues and customers such as a phone call, a meeting, or an Email. Use the Activities module to schedule and manage calls, meetings, and tasks.
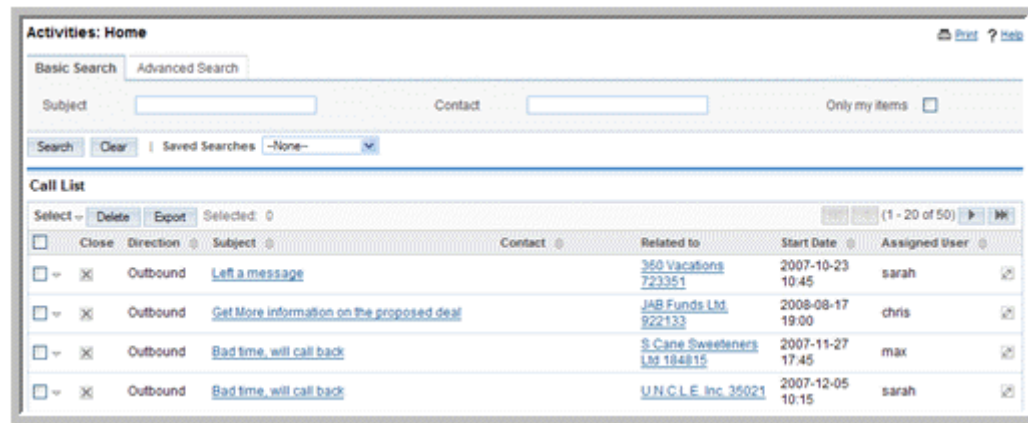
Typically, an activity is related to a record such as an account or contact. For example, you can schedule a meeting with one or more contacts to discuss a specific account or opportunity. When you create the activity, you can specify the record to which it is related. This allows you to view the scheduled activities from the specified record. For example, an account's detail page displays all scheduled activities. When you schedule an activity, you can also create notes and attachments if necessary.

The Shortcuts menu displays the following options:

Schedule Call. Click this option to schedule a call as described in "Scheduling Calls and Meetings" on page 36

Schedule Meeting. Click this option to schedule a meeting as described in "Scheduling Calls and Meetings" on page 36.

Create Task. Click this option to create a task as described in "Creating Tasks" on page 38.

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" on page 40.

Create Archived Email. Click this option to copy inbound and outbound Emails for archival as described in "Archiving Emails" on page 80.

Calls. Click this option to view and manage calls as described in "To manage activities" on page 38.

Meetings. Click this option to view and manage meetings as described in "To manage activities" on page 38.

Tasks. Click this option to view and manage tasks as described in "To manage tasks" on page 40.

Notes. Click this option to create or view notes as described in "Creating Notes and Attachments" on page 40.

Emails. Click this option to view and manage your inbound and outbound Emails as described in "To view and manage Emails in the Sugar inbox" on page 74.

Today. Click this option to view your daily appointments in the calendar as described in "To create an appointment" on page 34.

Import Notes. Click this option to import external data into a note as described in "To import data" on page 122.

Scheduling Calls and Meetings

When you schedule a call or a meeting, you are creating a record about 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 call or a meeting occurs. After you complete a call or meeting, or if you cancel it for any reason, you can update its status for the record.

When you create the call or a meeting, the Calls page or the 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 call or meeting. If other calls or meetings are scheduled, the busy time is blocked out.

Add Invitees. You can use the Add Invitees sub-panel to find users that you want to invite as described in "To add invitees" on page 37.

To schedule a call or a meeting

1. In the Shortcuts menu of the Calendar Home page, click **Schedule Call** or **Schedule Meeting**. Alternatively, you can use the Create Appointment quick form below the Shortcuts menu.

2. Enter information in the following fields:

    Subject. Enter the subject of discussion.

    Status. From the drop-down lists, select one of the following:

    Inbound. This option is for Calls only. Choose this option if it is an inbound call.

Outbound. This option is for Calls only. Choose this option if it is an outbound call.

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

Held. After a call or meeting is completed, change the status from Planned to Held.

Not Held. If a call or meeting did not occur for any reason, change the status from Planned to Not Held.

Start Date and Time. Click the **Calendar** icon and select the date; from the adjoining drop-down lists, select the time (hours and minutes).

Assigned to. Specify the user who is responsible for the call or meeting.

By default, it is assigned to you. To assign a different user, click **Select** to view the user list, and click the desired user name.

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

Account. Optionally, enter the name of the related account or click **Select** to search for one. Instead of an account, you can choose another related record such as an opportunity or contact from the drop-down list.

Reminder. Select this box if you want the system to send out a reminder to everybody on the list prior to the call or meeting. Select a time for the reminder from the drop-down list below.

Description. Optionally, enter a brief description for the purpose of the call or meeting.

3. Click **Save** to save the call information; click **Cancel** to return to the Calls home page or Meetings home page without saving the information.

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 call or meeting and changes its status to Held. The new call or meeting that displays on the page 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, enter all or any of the following information:

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

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

   Email. You can add an alphabet, a whole address, or a partial address.

2. Click **Search**.

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

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

To manage activities

- 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 activities, use the Mass Update panel as described in "Editing and Deleting Multiple Records" on page 17.

- To view the details of an activity, click its name on the list. Alternatively, point your cursor on the down-arrow next to the subject to view the Additional Details pop-up window. Click the **View** icon to view the details or the **Edit** icon to edit the details.

- To edit the information, on the detail page, click **Edit**, revise the information and click **Save**; click **Cancel** to exit the page without saving your changes.

- Associated information such as contacts, users, and notes are displayed in sub-panels.

- To duplicate an activity, click **Duplicate** in the detail view.

  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 an activity, on the detail page, click **Delete,** and then click **OK** to confirm the deletion.

- To find a specific call or 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 **Only my records** box.

- To perform an advanced search with additional search filters such as status, click **Advanced**.

- To edit an association, click the **Edit** icon in the sub-panel, make the changes, and click **Save**.

- To remove an association, select it and click the rem icon; click **OK** to confirm the removal.

- To edit or delete multiple calls and meetings, use the Mass Update sub-panel as described in "Editing and Deleting Multiple Records" on page 17.

Creating Tasks

Based on your work-related activities, you can 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. In the Shortcuts menu of the Activities Home page, click **Create Task**

2. On the Tasks page, enter information in the following fields:

   Subject. Enter the subject of the task.

   Due Date and Time. Optionally, 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.

   Start Date and Time. Optionally, click the **Calendar** icon and select the start date for the task; enter the time in the adjoining box.

   If there is no specific start date for the task, select the **None** box.

   Priority. From the drop-down list, select a priority that reflects the importance of completing the task.

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

   Status. From the drop-down list, select the current status of the task, such as Not Started, In Progress, and Completed.

   Account. Enter the name of the related account or click **Select** to search for one. Instead of an account, you can choose another related record such as an opportunity or contact from the drop-down list.

   Contact Name. Click **Select** to select a specific individual who is the contact for the task. By default, it is assigned to you.

   Description. Enter a brief description of the task.

3. Click **Save** to create the task; click **Cancel** to exit the page without creating the task.

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 as described in "Editing and Deleting Multiple Records" on page 17.

- To view the details of a task, click its subject.

- The Tasks page displays details such as the subject, due date, and status.

- To edit the information, on the detail page, click **Edit**, revise the information, and click **Save**; click **Cancel** to exit the page without saving your changes.

- To duplicate the information, on the detail page, click **Duplicate**, make modifications if needed, and click **Save**; click **Cancel** to exit the page without duplicating the task.

- 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 delete the task, on the detail page, click **Delete** and click **OK** to confirm the deletion.

Creating Notes and Attachments

You can create or import notes related to a specific call, meeting, or task for distribution to participants. 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 attachment

1. In the Shortcuts menu, click **Create Note or Attachment**.

2. On the Notes page, enter information for the following fields:

   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.

   Account. Optionally, enter the name of the related account or click **Select** to search for one. Instead of an account, you can choose another related record such as an opportunity or contact from the drop-down list.

   Subject. Enter the subject of the note.

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

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

3. 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 as described in "Editing and Deleting Multiple Records" on page 17.

- To view the details of a note, click its subject.

- The Notes page displays details such as the subject and date.

- To edit the information, click **Edit**, revise the information, and click **Save**; click **Cancel** to return to the Notes detail page without saving your changes.

- To duplicate the information, click **Duplicate**, make modifications if needed, and click **Save**; click **Cancel** to return to the Notes list without duplicating it.

- 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 delete the note, click **Delete** and click **OK** to confirm the deletion.

- The system deletes the note and returns to the Notes list.

Contacts Module

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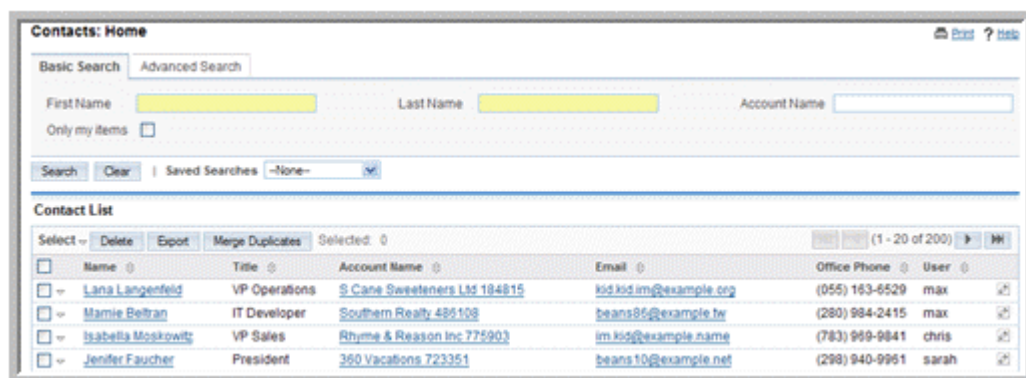
A contact is any individual who is a valid sales lead; that is, a lead who has been evaluated and assessed for a possible sales opportunity. You can associate a contact with any record such as an account, opportunity, or campaign. Associating a contact with a campaign enables you to track the effectiveness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

The Shortcuts menu displays the following options:

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

Enter Business Card. Click this option to add information from the business card of a new contact.

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

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

Import. Click this option to import contact information from an external application or file. For more information, see .

To create a contact

1. In the Shortcuts menu, click **Create Contact**; alternatively, enter required information in the New Contact quick form that displays below the Shortcuts menu.

You can add additional information after you save the form.

2. On the Contacts page, enter the following information:

    Contact Information

    First Name. Enter the contact's first name.

    Last Name. Enter the contact's last name.

    Office Phone. Enter the contact's work number.

    Mobile. Enter the contact's mobile phone number.

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

    Home. Enter the contact's home phone number.

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

    Other Phone. Enter the alternative phone number, if any.

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

    Title. Enter the contact's business title.

    Fax. Enter the contact's fax number.

    Assistant. Enter the assistant's name.

    Assistant Phone. Enter the assistant's phone number.

    Department. Enter the department to which the contact belongs.

    Birthdate. Click the **Calendar** icon and select the contact's birthdate.

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

Sync to Outlook. If you have installed Sugar Plug-in for Microsoft Outlook, select this box to synchronize this contact information with 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.

Assigned to. Select the individual who is responsible for communicating with this contact. By default, you are assigned to the contact.

Address Information: Enter the primary address and other address information. To copy information from one section to the other, you can enter the address information on either one of the sections and click the arrow buttons.

If you select a contact from the Contact's list, the system automatically enters the address for you. However, you can edit this information if needed.

Email Address(es): Enter an Emails address 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 Information: Enter a brief description for the contact.

Portal Information:

Portal Name. Assign a user name to allow the contact to access your Case portal.

Portal Password. Enter a user password for the contact to access the portal.

Confirm Portal Password. Enter the password again to confirm it.

Portal Active. Select this box to specify that the portal is in use.

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

To view and manage contacts

- To delete one or more of the listed contacts, use the Mass Update panel as described in "Editing and Deleting Multiple Records" on page 17.

- To display the detail view for a contact, click on the contact name in the list.

- To export records, click the **Export** link and follow the process described in "Exporting Data" on page 127.

- To merge duplicates, click the **Merge Duplicates** link and following the process described in "Merging Duplicate Records" on page 20.

- To edit contact information, in the detail view, click **Edit**.

- To manage newsletter subscriptions, on the detail page, click **Manage Subscriptions**. To add the individual to a newsletter subscription mailing list, select the newsletter from the Available NewsLetters list and drag it to the NewsLetters Subscribed To list. Similarly, to remove the individual from the mailing list of a newsletter, drag the newsletter from the Newsletters Subscribed to list to the Available Newsletters list. Click **Save** to update the information.

- To duplicate contact information, in the detail view, click **Duplicate**.

  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, in the detail view, click the **View Change Log** link located below the Edit button.

- To manage records in a sub-panel, see "To manage related information in sub-panels" on page 16.

Creating Business Cards

You can add a contact's business card information to your records. The basic information is similar to the contact information. When you create a business card, in the sub-panel below, you can relate it to an existing account or you can create a new account, opportunity, or appointment.

Creating Contacts From vCards

You can import a vCard file from your local file system to create a new contact in Sugar.

To import a vCard

1. In the Shortcuts menu, click **Create from vCard**.

2.   On the Contacts Import VCard page, click **Browse** to navigate to the vCard location on the local file system.

3.   In the Choose File dialog box, select the file and click **Open**.

4.   The file path displays in the **Contacts Import vCard** field.

5.   Click **Import vCard**.

6.   The information in the vCard displays on a new Contacts detail page.

     The system displays a **vCard** button adjacent to the contact name. You can click this button to open the vCard file and edit the information.

7.   To edit the contact information, click **Edit** in the Contacts detail page.

8.   To duplicate the information, click **Duplicate** in the Contacts detail page.

9.   To delete the information, click **Delete** in the Contacts detail page.

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 Shortcuts menu 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 data sources. For more information, see "To import data" on page 122.

To create an account

1. In the Shortcuts menu, click **Create Account**.

2. On the Accounts page, enter the following information:

Account Information:

Account Name. Enter a name for the account.

Phone. Enter the phone number of the organization.

Fax. Enter the fax number for the organization.

Other Phone. Enter an alternative phone number for the organization, if any.

Email. Enter an Email address for the organization.

Other Email. Enter an alternative Email address for the organization.

Website. Enter the URL for the organization's Web site.

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

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

Employees. Enter the number of employees in the organization.

Ownership. Specify the owner information.

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

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

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

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

Annual Revenue. Enter the annual revenue for the organization.

Assigned to. Enter the name of the individual who is responsible for communicating with the lead. To choose an existing user, click **Select**, and choose the person from the User List. By default, this is assigned to you.

Address Information. Enter the primary address and other address information. To copy the other address from the primary address, select the Copy address from left checkbox.

Email Address(es): Enter an Email address for the organization and your contacts and campaign targets within the organization. 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 for the lead.

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

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 all or some accounts on the list, use the Mass Update panel as described in "To edit or delete multiple records" on page 18.

- To view the details of an account, click its name in the list.

The detail page displays sub-panels for related records such as Activities, History, Contacts, Opportunities, and Leads. You can create new records or edit existing ones.

- To export records, click the **Export** link and follow the process described in "Exporting Data" on page 127.

- To merge duplicates, click the **Merge Duplicates** link and following the process described in "Merging Duplicate Records" on page 20.

- To edit an account, on the detail page, click **Edit**, make the necessary changes, and click **Save**.

- To duplicate an account, on the detail page, click **Duplicate**, and click **Save**.

  The system duplicates the account and displays its detail 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, on the detail page, click **Delete**.

- To track changes to account information, on the account detail page, click **View Change Log** below the Edit button.

- To view or manage related records in a sub-panel, see "To manage related information in sub-panels" on page 16.

Leads Module

Use the Leads module to create and manage sales leads for your organization.

Leads are early contacts in the sales process. After they have been evaluated and assessed, you can convert them into contacts, opportunities, and accounts. You can associate a lead with any type of campaign to track the effectiveness of the campaign in generating opportunities for your organization.

To create a lead

1. In the Shortcuts menu, click **Create Leads**.

Alternatively, you can use the New Lead quick form displayed below Shortcuts.

2. On the Leads page, enter information for the following:

    Lead Source. From the drop-down list, select the origins of the lead such as Trade Show or Direct Mail.

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

Status. From the drop-down list, select the status of the lead such as New or In Process.

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

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

Referred by. If someone referred the lead to you, enter the information in this field.

First Name. Enter the lead's first name.

Last Name. Enter the lead's last name.

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

Mobile. Enter the lead's mobile phone number.

Home Phone. Enter the lead's home phone number.

Other Phone. Enter the lead's alternative phone number, if any.

Fax. Enter the lead's fax number.

Email. Enter the lead's Email address.

Other Email. Enter the lead's alternative Email address, if any.

Email Opt Out. Select this box if the lead opted to not share their Email address with you.

Invalid Email. If an Email address is invalid, select this box

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.

Title. Enter the business title of the lead.

Department. Enter the department to which the lead belongs.

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 targeted during campaigns.

Assigned to. Enter the name of the individual who is responsible for the lead. To choose an existing user, click **Select**, and choose the person from the User List. By default, this is assigned to you.

Email Address(es): Enter an Emails address for the organization and your contacts and campaign targets within the organization. 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.

Address Information: 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 for you. However, you can edit this information if needed.

Description: Enter a brief description for the lead.

3. Click **Save** to save the new lead information; click **Cancel** to return to the Leads home page without saving the information.

After you save the lead, the lead's detail page displays on the screen. You can create activities and view past marketing activities including a list of any campaigns that were sent out to the lead.

Managing Lead Information

You can manage and track leads through their life-cycle.

To manage leads

- To search for a lead, use the Search sub-panel on the Leads Home page as described in "Searching for Information in Sugar" on page 22.

- To export records, click the **Export** link and follow the process described in "Exporting Data" on page 127.

- To merge duplicates, click the **Merge Duplicates** link and follow the process described in "To merge duplicate records from the list view" on page 20.

- To track changes to the lead information over time, click the **View Change Log** link.

- To edit or delete information some or all of the leads, use the Mass Update panel as described in "To edit or delete multiple records" on page 18.

- To view detail information, click on the lead name the list.

    o To edit information, on the detail page, click **Edit**.

    o To manage newsletter subscriptions, on the detail page, click **Manage Subscriptions**. To add the individual to a newsletter subscription mailing list, select the newsletter from the Available NewsLetters list and drag it to the NewsLetters Subscribed To list. Similarly, to remove the individual from the mailing list of a newsletter, drag the newsletter from the Newsletters Subscribed to list to the Available Newsletters list. Click **Save** to update the information.

    o To duplicate a lead, on the detail page, click **Duplicate**.

    o Duplication is a convenient way of creating a similar lead. You can change the information in the duplicate record to create the new lead.

    o To delete a lead, on the detail page, click **Delete**.

    o To convert a lead to a contact, click **Convert Lead**. Optionally, you can also convert the lead to a related Account, Opportunity, and Appointment.

    o To view and edit related information in a sub-panel, see "To manage related information in sub-panels" on page 16.

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" on page 101.

Opportunities Module

Use the Opportunities module to create and manage sales opportunities for your organization.

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.

An opportunity specifies the estimated sales amount for an account 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 a sale. The administrator defines and sets the sales stage depending upon the requirements in your organization. The estimated sales 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 80%, and at the Negotiation sales stage, probability increases to 95%.

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 .

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

To create an opportunity

1. In the Shortcuts menu, click **Create Opportunity**.

Alternatively you can use the Create Opportunity quick form displayed below Shortcuts. This form contains only the required fields. You can enter information for optional fields after you save the form.

2. On the Opportunities page, enter information for the following fields:

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**.

Type. From the drop-down list, specify whether the opportunity is from an existing customer or a potential customer.

Lead Source. From the drop-down list, specify the lead source such as Trade Show or Cold Call.

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

Assigned to. Enter the name of the individual who is responsible working on the opportunity. To choose an existing user, click **Select**, and choose the person from the User List. By default, this is assigned to you.

Amount. Enter the estimated amount of the closing a sale.

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

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

Sales Stage. The current stage of this opportunity.

The value specified for the Sales Stage determines the default value displayed in the Probability field on the Opportunity page.

Probability (%). The system 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%. However, you can manually change the Probability % value.

Description. Enter a brief description of the opportunity.

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

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 some or all the listed opportunities, use the Mass Update sub-panel as described in "To edit or delete multiple records" on page 18.

- To export records, click the **Export** link and follow the process described in "Exporting Data" on page 127.

- To merge duplicates, click the **Merge Duplicates** link and following the process described in "To merge duplicate records from the list view" on page 20.

- To view the details of an opportunity, click the opportunity name in the list.

- To edit the details, on the detail page, click **Edit**.

- To duplicate an opportunity, on the detail page, click **Duplicate**.

- 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, on the detail page, click **Delete**.

- To track changes to an opportunity over time, click the **View Change Log** link.

- To view and manage related records in a sub-panel, see "To manage related information in sub-panels" on page 16.

- To import opportunity data from an external source, see "To import data" on page 122.

Cases Module

Use the Cases module to track and manage problems with your services that are reported by your users and customers.

After you create a case, you can associate it with a one or more related bug.

To create a case

1. In the Shortcuts menu, click **Create Case**.

2. On the Cases page, enter information in the following fields:

    Priority. From the drop-down list, specify the urgency of the problem.

    Status. From the drop-down list, specify the current status of the problem such as New or Closed.

    Subject. Enter a brief statement of the problem.

    Assigned to. Specify an individual to take ownership of the case.

If the administrator has enabled Email notification, then case owners receive an Email whenever a case is assigned to them.

Account Name. Enter the name of associated account or click **Select** to choose the account.

Description. Enter a clear description of the problem.

Resolution. Enter the results of the investigation into the problem.

3. Click **Save** to save the case; click **Cancel** to exit the page without saving the case.

The case detail page displays on the screen. On this page, you can create new bugs for the case or associate it with existing bugs. For more information on creating bugs, see "Bug Tracker Module" on page 59.

You can also associate the case with new or existing records such as contacts and projects.

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 some or all cases, use the Mass Update panel as described in "Editing and Deleting Multiple Records" on page 17.

- To export records, click the **Export** link and follow the process described in "Exporting Data" on page 127.

- To merge duplicates, click the **Merge Duplicates** link and following the process described in "Merging Duplicate Records" on page 20.

- To view the details of a case, on the Cases home page, click on the case name in the list.

- To edit the case details, click **Edit** on the detail page, make the changes and click **Save**.

- To duplicate a case, click **Duplicate** on the detail page

- Duplication is a convenient way of creating a similar case. You can change the information in the duplicate record to create a new case.

- To find duplicates, click **Find Duplicates** on the detail page.

- To delete a case, click **Delete** on the detail page.

- To track changes to the case over time, click the **View Change Log** link.

- To export information on one or more cases, select them in the Case List sub-panel on the Cases Home page, click the **Export** icon, and export them as described in "To export data from Sugar" on page 127.

- To create or edit related records in a sub-panel, see "To manage related information in sub-panels" on page 16.

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.

To report a bug

In the Shortcuts menu, click **Report Bug**.

4. On the Bug Tracker page, enter information for the following fields:

   Priority. From the drop-down list, specify the urgency of the problem.

Status. From the drop-down list, specify the current status of the problem such as New or Closed.

Type. From the drop-down list, select Defect if the issue is a problem with the product. Select Feature if the issue is a suggested enhancement for the product.

Source. From the drop-down list, specify whether the bug was reported by an internal user within the organization, by an external user through Email, through the organization's Website, or on the Organization's forum by the external developer community member.

Category. From the drop-down list, select the product associated with the bug.

Found in Release. From the drop-down list, select product version in which the bug was found.

Assigned to. Click **Select** and, from the Users list, click the name of the individual who has ownership of the bug. By default, the bug is assigned to you.

Subject. Enter a brief statement of the problem.

Resolution. From the drop-down list, select the resolution to the bug.

Fixed in Release. From the drop-down list, select the product version in which the bug was fixed.

Description. Enter a description of the problem.

Work Log. Use this field to record your actions to resolve the bug.

5. Click **Save** to create the bug; click **Cancel** to exit the page without creating the bug.

    The bug detail page displays on the screen. On this page, you can create a new case for the bug or assign an existing case. For more information on creating cases, see "Cases Module" on page 57.

    You can also associate the bug with related records such as contacts and projects.

To manage bugs

- 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 some or all of the bugs, use the Mass Update panel as described in "To edit or delete multiple records" on page 18.

- To export records, click the **Export** link and follow the process described in "Exporting Data" on page 127.

- To merge duplicates, click the **Merge Duplicates** link and following the process described in "Merging Duplicate Records" on page 20.

- To view the details of a bug, on the Bug Tracker home page, click the bug in the Subject column.

- To edit the bug details, on the detail page, click **Edit**.

- To duplicate a bug, on the detail page, click **Duplicate**.

- 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, on the detail page, click **Delete**.

- To track changes to the bug over time, click the **View Change Log** link below the Edit button.

- To export information on one or more bugs, select them in the Bug List sub-panel on the Bugs Tracker Home page, click the **Export** icon, and export them as described in "To export data from Sugar" on page 127.

- To create or manage related records in a sub-panel, see "To manage related information in sub-panels" on page 16.

Documents Module

Use the Documents module to create and manage files that you share with users and contacts.

To create a document

1. In the Shortcuts menu, click **Create Documents**.

2. On the Documents page, enter information for the following fields:

    Document Name. Enter a name for the document.

    File Name. Enter the name of the file you are using to create the document; click **Browse** to navigate to the location of the document.

    Revision. If you revised this document, enter the revision number.

    Template. Select this box if you are creating a template.

Document Type. Select a pre-defined document from the drop-down list. If the document does not belong to any of the listed types, select None.

Category. Select a pre-defined category from the drop-down list. If none of the categories apply, select None.

Sub Category. If you selected a category, select the category subset if applicable.

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 only displays in the list view and helps organize the files and makes it easier to find documents under a specific subject. The values listed in Categories and Sub Categories are defined by the administrator.

Status. From the drop-down list, select the status to indicate the current state of the document such as Draft or Under Review.

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.

Related Document. Click **Select** to associate a related document.

Related Document Revision. From the drop-down list, select 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.

Any file that you attached when you created the document displays on the detail page in the Download File field. Click the attachment to open it or to save it to your local machine. Right-click the attachment to bookmark it, copy it, and to view its properties.

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 some or all the documents, use the Mass Update panel as described in

- To view the details of a document, on the Documents home page, click its name in the list; links to attachments, if any, are displayed below Description.

- To view an attachment, click the **attachment** link; To update an attachment, see

- To edit a document, on the detail page, click **Edit**.

- To duplicate a document, on the detail page, click **Duplicate**.

- 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, on the detail page, click **Delete**.

- To track changes to the document over time, click the **View Change Log** link below the Edit button.

- To export documents, select them in the Document List sub-panel on the Documents Home page, click the **Export** icon, and export them as described in "To export data from Sugar" on page 127.

- To create or manage the related records in a sub-panel, see "To manage related information in sub-panels" on page 16.

To update an attachment

1. In the Document Revisions sub-panel of the document's detail page, click **Create**.

   The Documents Revision page displays on the screen. The current document name and revision number appear on this 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. Specify a revision number for the revised document.

   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. In this 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

In the Documents module, you can identify Microsoft Word mail merge templates. These templates are used when a mail-merge is performed directly from within Sugar. The templates themselves can be created from the Sugar Plug-in for Microsoft Word and uploaded to the Sugar document repository.

- If a document is a Mail Merge template, the document type displays as "Mail Merge" on the detail page.

- In the navigation bar, a link allows direct access to the Sugar Mail Merge Wizard.

Emails Module

The Emails module is an Email client that enables you to manage your Emails.
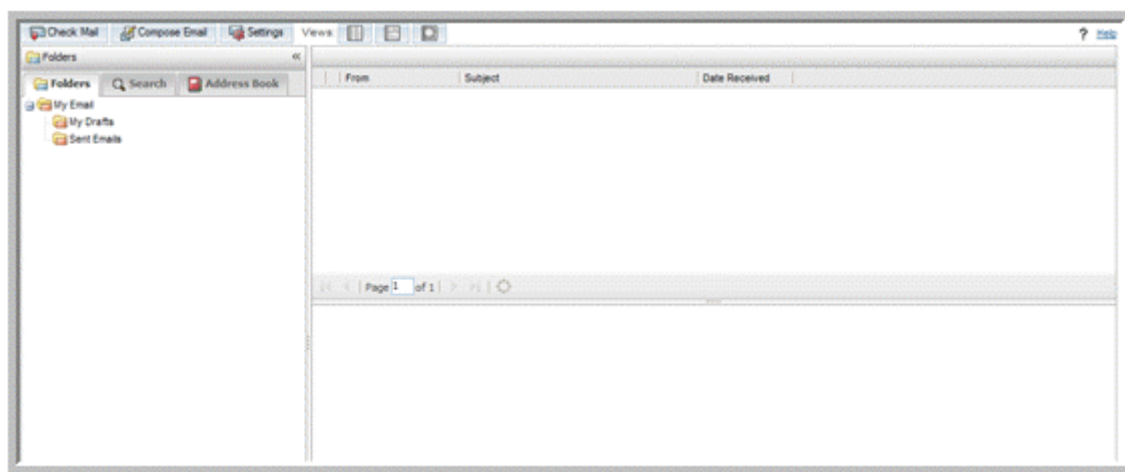
You can take the following actions in the Emails module:

Access emails. You can view and process Emails on external mail servers without downloading them into the Sugar database.

Import emails. You can import Emails into Sugar from external mail servers. The Emails module provides a folder named *My Email* for this purpose. You can associate an imported Email with a Sugar record such as a bug or an account. This creates a thread of Email communication related to that record for future reference.

Archive emails. You can copy Emails that you sent to external accounts into Sugar. For example, Emails sent from Microsoft Outlook using the Sugar Plug-in for Microsoft Outlook. Archiving Emails creates an Email record in Sugar using Sugar's Email form.

In addition, you can perform the following actions in the Emails module:

- Search for Emails based on parameters, such as keyword and subject.

- Create a related record, such as a bug or a lead, from an Email.

- Create an address book consisting of users, contacts, and leads with whom you frequently communicate.

The default layout of the Emails module divides the page into three panels: the left panel displays the Email folders tab, address book tab, and search tab; the top of the middle panel lists Email messages in the Sugar inbox, and the bottom of the middle panel displays the contents of the Email selected from the list above. You can select a different layout by clicking the desired Views icon.

Options to check for incoming Emails, compose Emails, configure Email settings also display at the top of the page.

Supported Email Protocols

Sugar supports POP3 and IMAP protocols to access your external mail accounts. You can also send the Emails that you compose in Sugar through any of your external mail

accounts. The IMAP protocol retains the folder structure on the Email server when you view Emails in Sugar. The POP3 protocol does not support folders and therefore, Emails from all folders are displayed in the Sugar inbox.

Configuring Email Settings

The Email settings in Sugar are designed to help you automate many of your Email management actions, such as responding to Emails, importing Emails, and deleting Emails. Some settings have been pre-configured with default values. Other settings are optional. You can customize Email settings to suit your requirements.

Email settings in Sugar comprise of the following categories:

- General

- Mail Accounts

- Folders

General Settings

General settings include options such as the configuring the page layout and automatic import of Emails. Some of these settings have default values, which you can change. General settings apply to all your mail accounts in Sugar.

To specify general settings

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

    The Settings window displays the default configuration
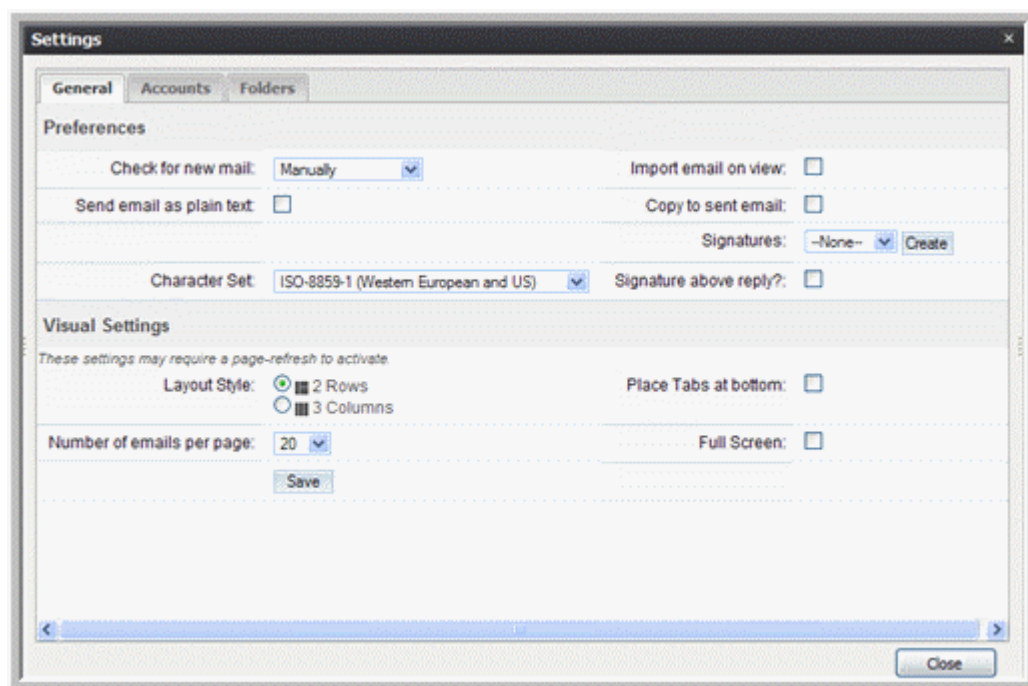
2. Enter values for any of the following fields:

Check for new mail. If you want the system to automatically check your mail accounts for new Emails, select the time intervals from the drop-down list. The default setting is for the user to manually check for Emails.

Send Email as plain text. Check this box to send Emails in plain text format instead of the default HTML format.

Layout Style. Select an option to view the contents of the Emails page, namely the Sugar inbox, the message body, and the Email folders. You can view them in a two column format or a three column format.

Number of emails per page. From the drop-down list, select how many Emails you want to view per page in the Sugar inbox.

Import email on view. Select this box to import Emails from the external mail server into the Sugar database when you view them.

Copy to sent email. Select this box to store a copy of your outbound Email messages in the Sugar database.

Signatures. From the drop-down list, select a signature for your outbound Emails. To create a signature, click **Create**, enter your full name and format your signature as HTML or plain text.

Signature above reply. Select this box to place your signature above your response to an Email.

Place tabs at bottom. Select this box to display the tabs for Folders, Search, and Address Book at the bottom of the page.

Full Screen. Select this box for a full-screen display of the Emails page.

3. To save your preferences, click **Save**; To exit the Settings window, click **Close**.

Mail Accounts

You will need to set up a mail account in Sugar for every external mail account that you want to access through Sugar. You must set up at least one mail account in Sugar to be able to send and receive Emails.

You must also specify a mail server for outbound Emails to be able to send Emails.

A mail account can be an individual mail account or a group mail account. Users can set up individual mail accounts for themselves. Administrators can set up group mail accounts to store Emails for distribution amongst users. As a user, you can subscribe to a group mail account that your administrator has created.

You can synchronize your accounts to ensure that Sugar displays the most recent Emails from your external accounts. You can import these Emails into Sugar if needed.

To retain the folder structure that exists on the external Email server within Sugar, you will need to use the IMAP protocol. With the IMAP protocol, you can limit access to specific folders on your external account. For more information on using folders, see "Email Folders" on page 70.

Note: Settings such as the Email Server address and protocol specified in the Emails module override the company-wide Email settings configured by the administrator.

To create a mail account

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

The Settings window displays on the page

2.   Select the Mail Accounts tab.
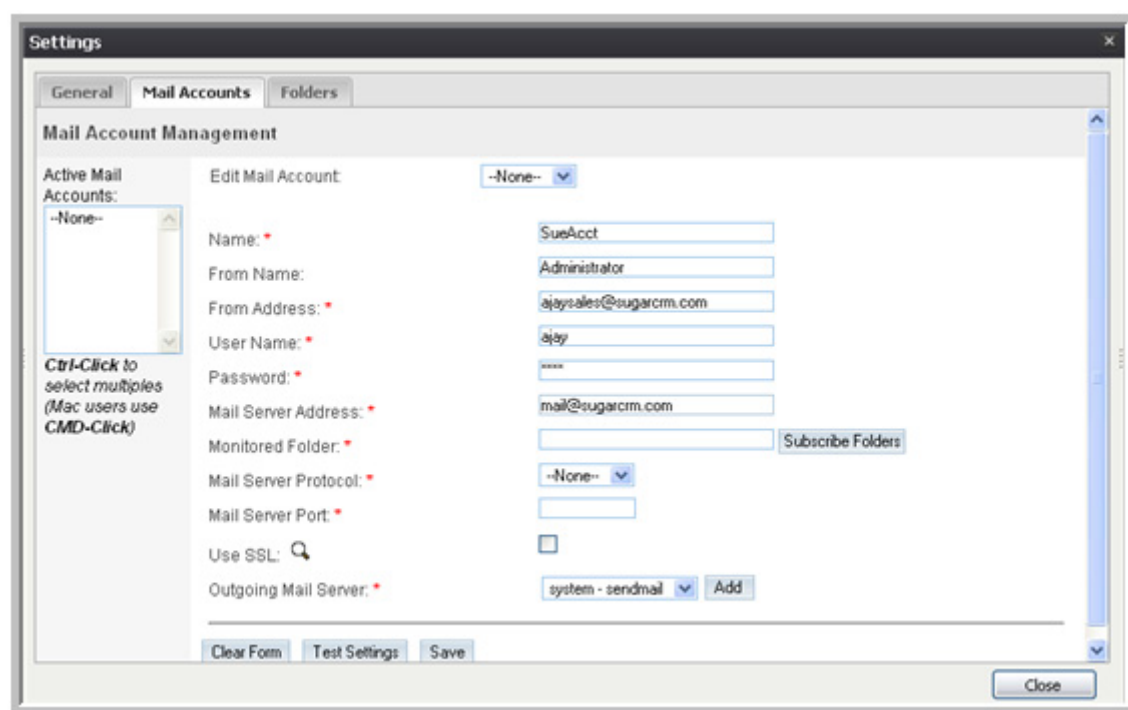
3.   Enter the following information to create a new mail account:

Name. Enter a name for the account.

From Name. Enter the name of the sender.

From Address. Enter the sender's Email address.

User Name. Enter the sender's user name. Some Email servers may require this to be the sender's Email address.

Password. Enter your user password.

Mail Server Address. Enter the address of the Email server from which your Emails will be routed to Sugar.

Mail Server Protocol. From the drop-down list, select either IMAP or POP3.

Monitored Folder. If you are using the IMAP protocol, to limit access to specific folders from the external mail account, click **Subscribe Folders** and select the folders. To select multiple folders, hold down the Shift key or the Ctrl key.

The selected folders display in your inbox and you can view their contents.

When you create an account for an external mail account such as Yahoo or Google, you must ensure that you are using their mail server protocol.

Mail Server Port. The system automatically populates this field with the port number for the selected protocol.
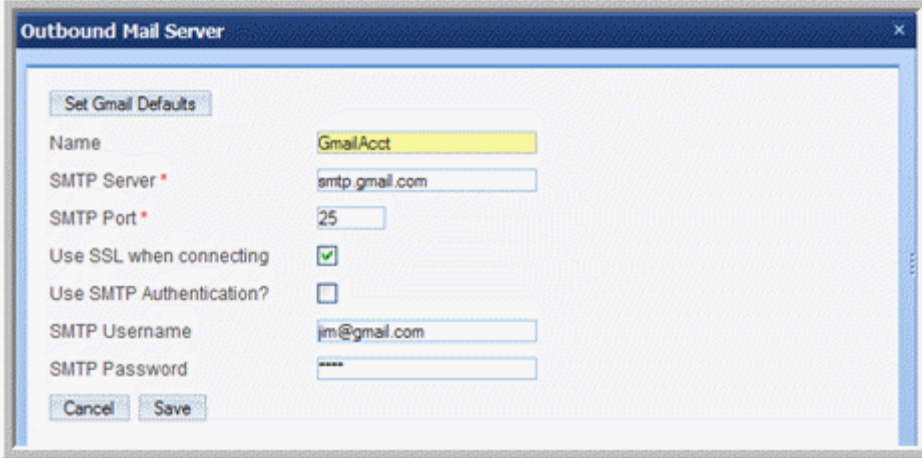
Use SSL. Select this box if you are using POP3 and your external mail account requires SSL.

Outgoing Mail Server. From the drop-down list, select a mail server for outbound Emails. You can use Sugar's default mail server, SendMail, or you can add a new mail server as described in **"To add a mail server for outbound Emails"**.

4. Click **Test Settings** to ensure that the settings are correctly configured.

5. Click **Save** to create the mail account.

6. To create another mail account, click **Add Account**.

7. To close the Settings window, click **Close**.

To add a mail server for outbound Emails

1. Click the **Add** button located next to the Outgoing Mail Server drop-down list.

   The Outbound Mail Server page displays on the screen.

2. Enter information for the following fields:

   Name. Enter a name for the account.

   SMTP Server. Enter the SMTP mail server's address.

   SMTP Port. Enter the mail server's port number.

   To add Google's Gmail server, click **Set Gmail Defaults**.The system fills in the SMTP Server and SMTP Port fields with the Gmail server address and port number respectively.

   Use SSL when connecting. Select this option if you are using the POP3 protocol and the mail server requires SSL.

   Use SMTP Authentication. Select this option if the mail server requires authentication to send out the Email.

SMTP Username. Enter your username for the mail account.

SMTP Password. Enter your password for the mail account.

3. Click **Save** to add the mail server; click **Cancel** if you do not want to add the mail server.

Email Folders

A folder can be a inbox, a local folder, or a group folder. The system creates inboxes, users create local folders, and the administrator creates group folders.

Sugar automatically creates a folder for every mail account that you configure. Emails in this folder reside on the mail server of the associated mail account.

Sugar also provides a local folder named *My Email*. Emails that are assigned to you by the administrator or by other users reside in My Email. My Email contains two sub-folders for your use named *My Drafts* and *Sent Mail*. All Emails in these three folders are stored in the Sugar database.

You can import Emails from your external mail accounts into Sugar. To group and store these Emails, you can create additional folders. All Emails in your local folders reside in the Sugar database.
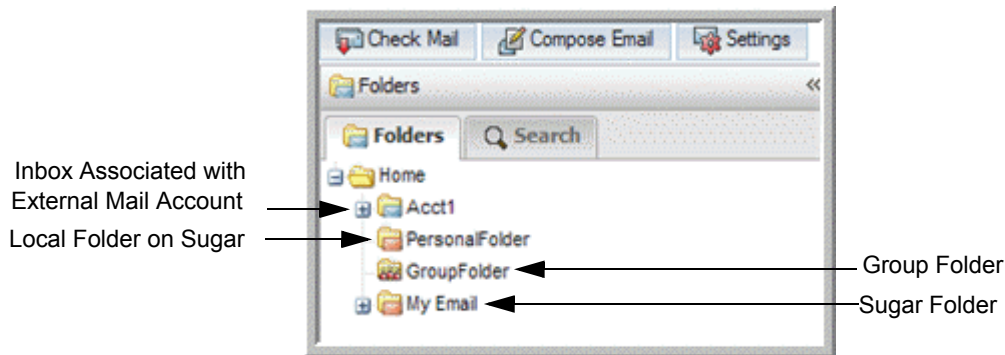
Group folders are not always associated with a mail account, but they can be associated with group mail accounts. Administrators use these folders to distribute Emails amongst users for necessary action. Typically, these are Emails for product bugs and cases that are addressed to your organization and not to any particular user.

For information on creating Group folders, see the *Sugar Community Edition Installation and Administration Guide*.

You can view all folders in the Folders tab of the Email Settings page. In order to view a folder in the Folders tab of the Emails home page, you must select it in the Folders tab of the Email Settings window.
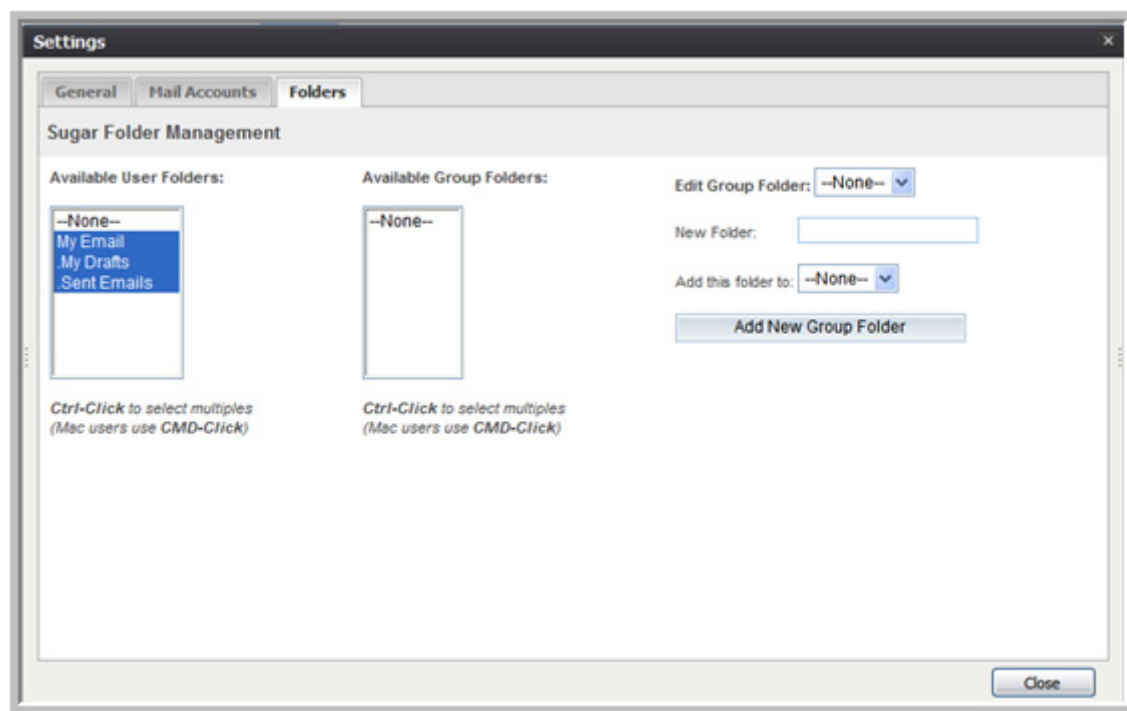
To create a local folder

1. In the Folders tab in the Emails home page, right-click My Email and select **Create Folder**.
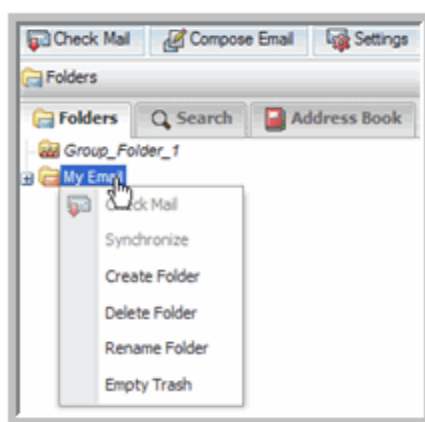
The Add New Folder dialog box displays on the page.

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 a mail account, select the account from the list on the Folders tab on the Emails home page, right-click, and select **Create Folder**; click **OK**.

    To create a sub-folder, select an existing folder from the account, right-click, and select **Create Folder**; click **OK**.

Composing Emails

From the Emails module, you can send out Emails to users, contacts, leads, and other external individuals and organizations. When you compose an Email, you can choose the mail account from which to send the Email. By default, the system uses the Email settings specified in the General tab. These include the signature and Email import options. However, when you compose an Email, you can change some of these options for it. You can also specify additional options such as an Email template and a different character set.

To compose an Email

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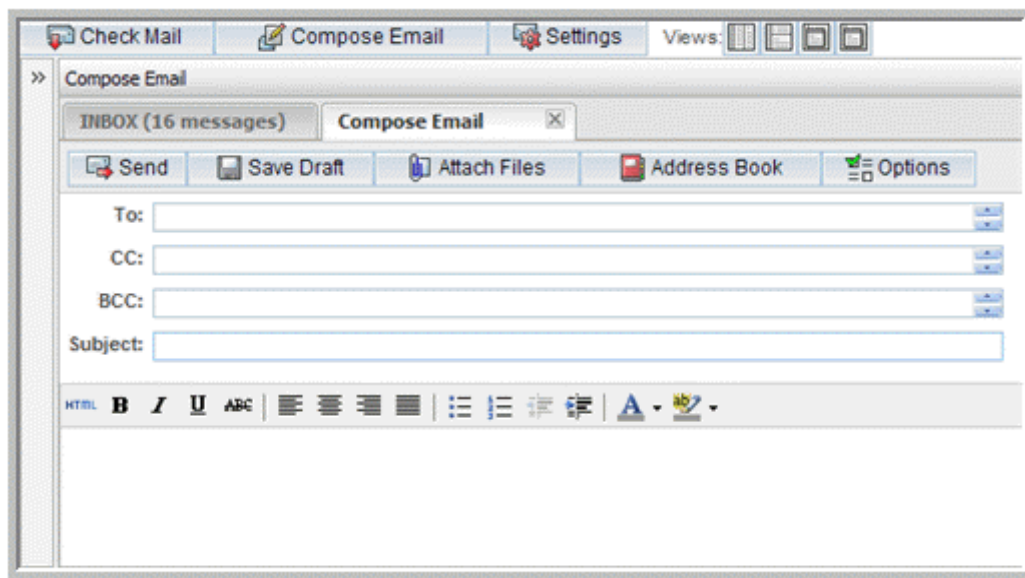
2. On the Compose Email page, enter information for the following fields:

3. **From**. To route the Email through a specific mail account, click the down arrow to select the account from the drop-down list.

    To. Enter the names of one or more individuals. You can also drag and drop names from the address book.

    CC. Enter the names of one or more individuals who will receive a copy of the Email.You can also drag and drop the names from the address book.

    BCC. Enter the names of one or more individuals who will receive a blind copy of the Email.

    Subject. Enter the subject of the Email.

Enter the Email text in the body field. Highlight the text and click buttons on the toolbar to apply standard formatting options such as font face, size, bold, italics, indentation and color. Additional buttons insert rules, hyperlinks, pictures, table and display the HTML source code. To send an Email in HTML format, click the HTML link on the toolbar and type the contents in HTML format in the HTML Source Editor window.

4. To attach a file to the Email click **Attach Files**.

5. The Attach options display in the right panel.To select a file from your local machine, click **Add File from File System**; To attach a file located in the Sugar repository, click **Add Documents from Sugar Documents**. To remove the document, click **Remove**.

    Alternatively, click **Options** and, from the Attach tab, browse to the location of the file and attach it to the Email.

6. To populate the Email with the contents of an Email template, click **Options** and select the template from the Templates drop-down list in the Options panel.

7. To change the signature, in the Options panel, select the signature from the Signatures drop-down list.

8. To change the default character set, select from the Character Set drop-down list.

9. To save the Email as a draft, click **Save Draft**.

10. To send the Email, click **Send**.

    If you created more than one mail account in Sugar, from the drop-down list in the To field, select the account from which you want to sent the Email.

11. To save a copy of the Email in the Sent folder in Sugar, select the **Copy to Sent email** box in the General tab in the Settings window.

    After an Email has been dispatched, it is listed in the Sent Emails folder.

Viewing and Managing Emails

When you view an Email in the Sugar inbox, you can take actions such as importing it or creating a record such as a bug or lead.

To view and manage Emails in the Sugar inbox

1. To check for new Emails, select a mail account and click **Check Mail**.

    The system lists new messages in your Sugar inbox.

2. Select an Email to view its contents in the panel below; double-click the Email to view its contents in a separate panel.

3. To mark an Email as unread, read, flagged, or unflagged, select the Email from the inbox, right-click, select **Mark**, and choose the option of your choice.

4. To create a record from the Email, click **Quick Create**. For more information, see "To create a record from an Email" on page 77.

5. To import the Email, click **Import to Sugar**. For more information, see "To import an Email into Sugar" on page 77.

6. To respond to the person who sent the Email, click **Reply** to view the Compose Email page.

7. To send your response to all the Email recipients, click **Reply All**.

8. To forward an Email to another individual, click **Forward**.

9. To delete an Email from the Detail page, click **Delete**; to delete multiple Emails, select them from the List view on the Emails home page and click **Delete**.

10. To view the Email header information, the raw Email text, or the printable version, click **View** and select the appropriate option from the drop-down menu.

11. To update multiple Emails, such as Email assignments and status change, select the Emails from the Emails list and use the Mass Update panel as described in "Editing and Deleting Multiple Records" on page 17.

To view and manage Emails in a group folder

1. On the Emails home page, select the group folder from the Folders list.

   Emails in the Group folder display in the right panel.

2. To assign an Email to yourself or to another team member, do the following:

   a. Select the Email from the list, right-click, and select **Assign To**.
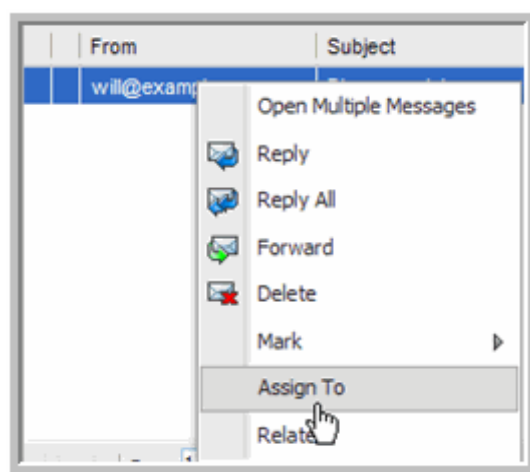
The Assignment dialog box displays on the screen.
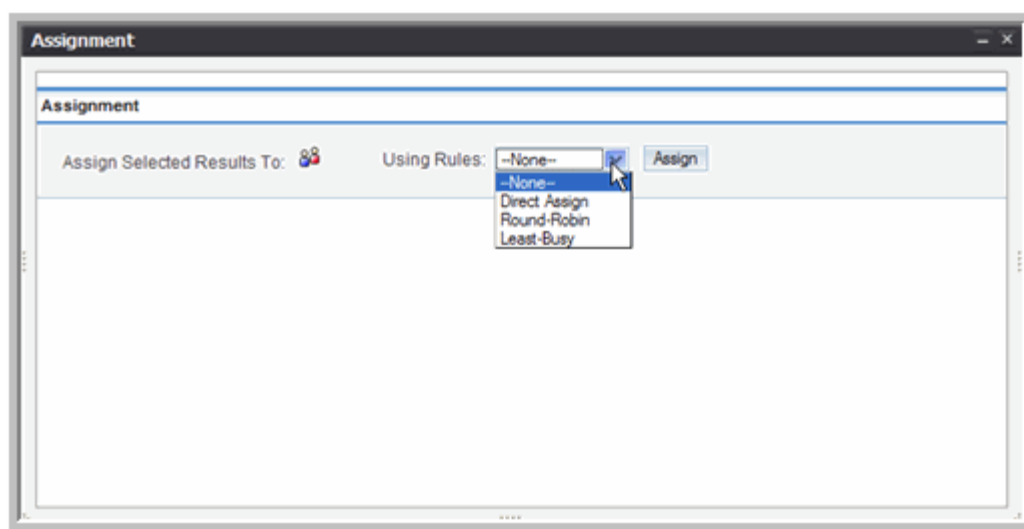
b.   Click the **Users** icon to view a list of existing teams and team members.
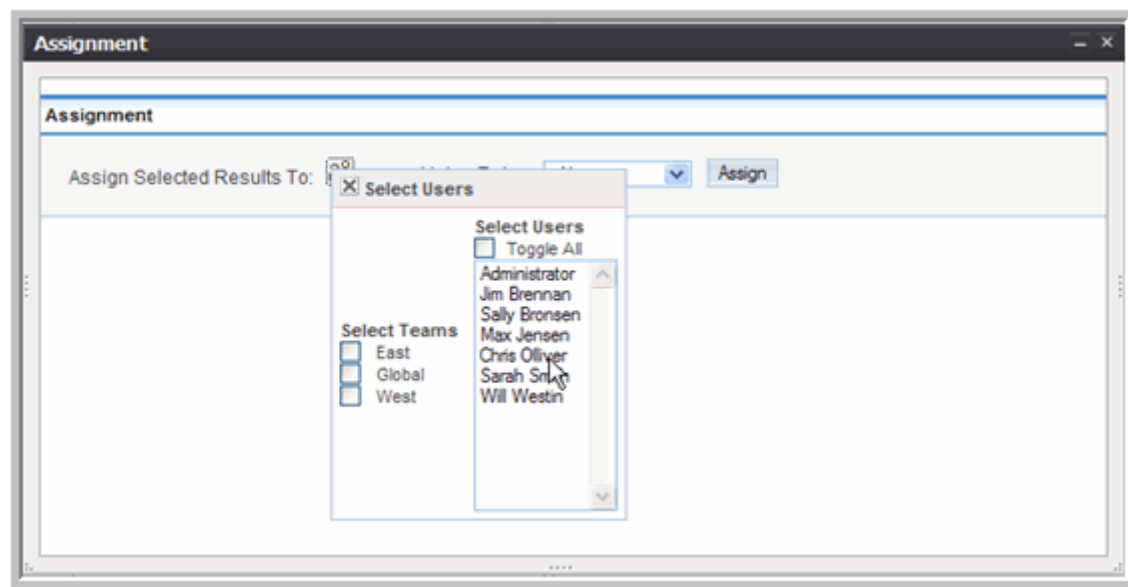
c.   Select a team to select all its members or select specific users from the list.

d.   Close the Select Users window.

e.   From the Rules drop-down list, select one of the following assignment rules:

Direct Assign: Use this option to assign the Email to a specific user.

Round Robin: Use this option to assign Emails evenly between two or more selected users.

Least Busy: Use this option to assign Emails to the user who has the shortest queue of assigned Emails.

f.   Click **Assign**.

The Email no longer displays in the Group folder but displays in the My Emails folder of the assigned user.

3.   To associate the Email with a record such as a bug or an account, do the following:

a.   Select the Email from the list, right-click, and select **Relate**.

The Relate Email dialog box displays on the screen.
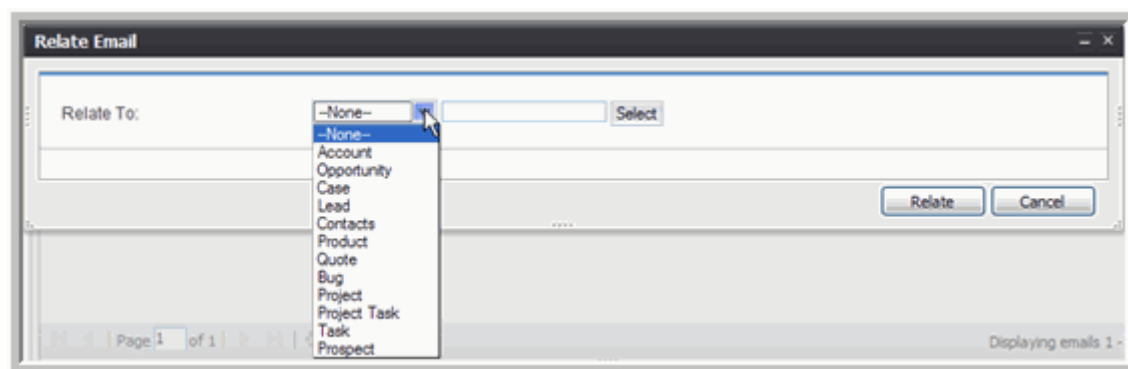
b. Select the record type from Relate To drop-down list, and click **Select** to view the list of records to choose from.

c. 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 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.

To import an Email into Sugar

1. Select the Email in the Sugar inbox, right-click, and select **Import to Sugar**.

The Import Settings dialog box displays on the screen.
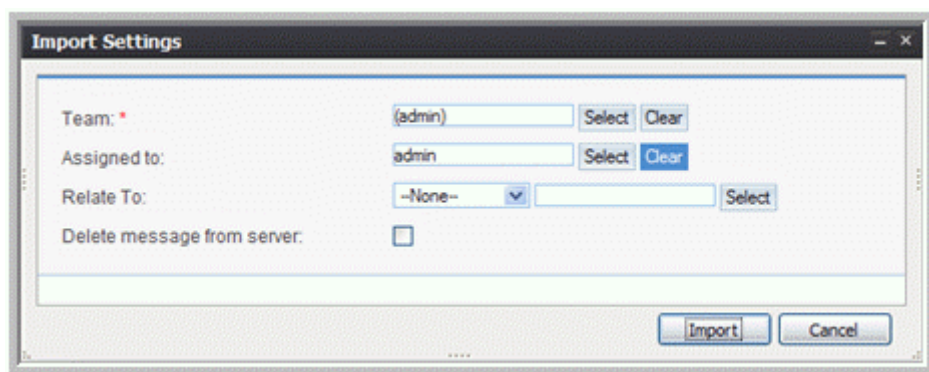
2. Specify the following information.

    Team. Click **Select** to select the team that will be assigned to take action on the Email.

    Assigned to. Click **Select** to select a specific user within the team.

    Relate To. Optionally, select a module and then click **Select** to choose a record within the module with which to associate the Email.

    Delete message from server. Select this box to delete the Email from the external Email server.

3. Click **Import** to import the Email into the Sugar database; click **Cancel** to return to the Sugar inbox without importing the Email.

Creating an Email Address Book

You can populate the Email address book with the Email addresses of individuals with whom you frequently correspond. You can select individuals from your list of contacts, leads, targets, and users. If your address book contains a long list of entries, you can use a filter to view only entries that meet the specified criteria as described in "To manage address book entries" on page 79.

To add entries to the address book

1. In the left panel of the Emails home page, select the Address Book tab.

2. Click **Add Entries** to add entries to the address book.

    The Select Address Book Entries window displays on the page.

3. To search for individuals by their first name, last name, or Email address, enter the information in the appropriate field and click **Search**. To view the first 25 names of users, contacts, leads, and targets on the list, click **Search** without entering a name or an Email address.
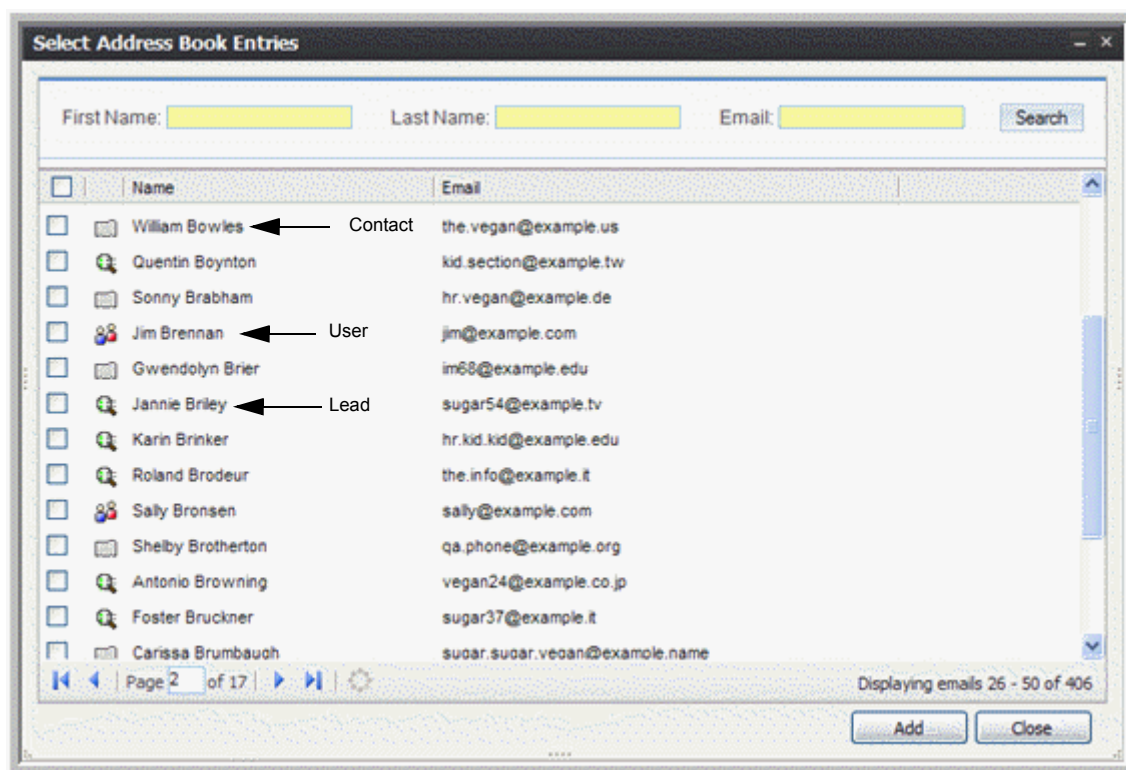
4. Select the Email addresses and then click **Add** to add a name to your address book and close the window after you complete adding the names.

   The selected entries are now listed in your address book.

To manage address book entries
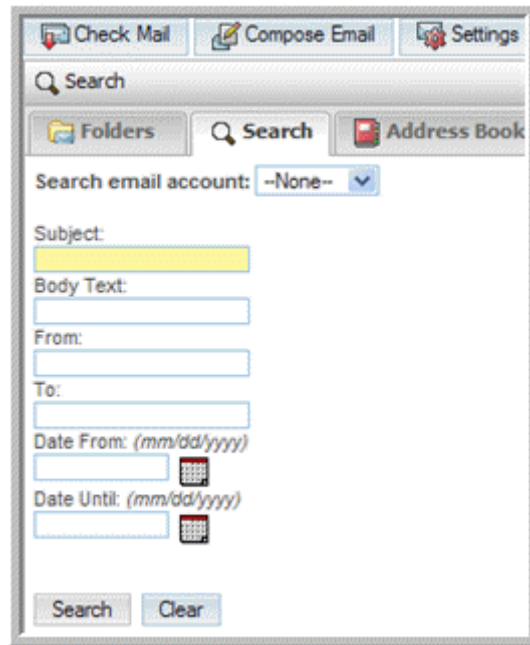
1. To search through your address book, you can set a filter. The filter can be a single alphabet or multiple alphabets. For example, to find all names that start with or contain the alphabet A, you can enter either "a" or "A".

2. To view an individual's Email address, click the name in your address book.

3. To delete an entry from the address book, right-click the name and select **Remove**.

4. To send an Email to one or more individuals in your address book, right-click the names and select **Compose to**.

Searching for Emails

You can search for Emails by subject line or with additional filters such as a keyword in the Email body to narrow down search results.

To search for Emails

1. Click the **Search** tab in the left panel.

2. Select the mail account that you want to search.

3. To search for Emails by subject line, enter the word in the Subject field and click **Search**.

4. To search by keyword, enter the word in the Body Text field and click **Search**.

5. To search for Emails sent or received by a specific individual, enter the name in the From field or the To field respectively and click **Search**.

6. To search for Emails within a certain date range, click the calendar icon and select the start date of the time range in the Date From field and the end date of the time range in the Date Until field and click **Search**.

7. To remove the values that you entered in these fields, click **Clear**.

Archiving Emails

If you are using Sugar Plug-in for Microsoft Outlook, you can copy Emails from Outlook into Sugar and archive them for your records.

You can associate an archived Email with any record such as an account, opportunity, bug, or case. For example, when you associate an Email with an account, the Email displays in the History sub-panel of that account. You can click on the Email link in the History sub-panel to view the details of the Email.

You can also manually archive your inbound and outbound Emails in Sugar. When you archive an Email, you can also attach documents located in the Sugar repository or on your local machine.

To manually archive Emails

1. In the Shortcuts menu of the Emails module, click **Create Archived Email**.

   The Create Archived Emails page displays on the screen.

2. In the Create Archived Emails form, enter information for the following fields:

   Date & Time Sent. Click the **Calendar** icon and select the date the Email was sent; enter the time in the adjoining field.

   Account. From this drop-down list, select a related module such as Accounts or Opportunity and click **Select** to specify the record.

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

   To. Enter the name of the Email recipient.

   Cc. Enter the name of individuals copied on the Email.

   Bcc. Enter the names of individuals who received a blind copy of the Email.

   From. Enter the name of the individual who sent out the Email.

   Subject. Enter the subject of the Email.

   Body. Copy and paste the contents of the Email.

   Edit Plain Text. Select this box to display the Email in text format if an Email client cannot render HTML code.

   Add File From File System. Click this button to attach a file that is located on your machine. You can enter the path to the file or click **Browse** to navigate to the file.

   Add Document From Sugar Documents. Click this button to attach a file that is located in the Sugar database.

3. Click **Save** to archive the Email; click **Cancel** to exit the page without archiving the Email.

Creating Email Templates

You can use Email templates to create form letters for automated Email responses to inbound Emails and for mass Email campaigns. For example, when you receive an inbound Email regarding a bug or a case, you can send out automatic reply stating that the matter will be addressed.

For Email campaigns, 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" on page 90.

You can use Email templates to create automated responses when you receive inbound Emails regarding a specific topic such as a bug or a case.

To create an Email template

1. In the Shortcuts menu, click **Create Email Template**.

2. Enter information for the following fields:

    Name. Enter a name for the template.

    Description. Enter a brief description about the template.

    Insert Variable. From the drop-down list, select a record such as contact and select a field such as Full 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.

8. **Attachments**:

   To attach a file, including images, click **Browse** to navigate to its location on your local machine.

   The attached files displays below the Browse button.
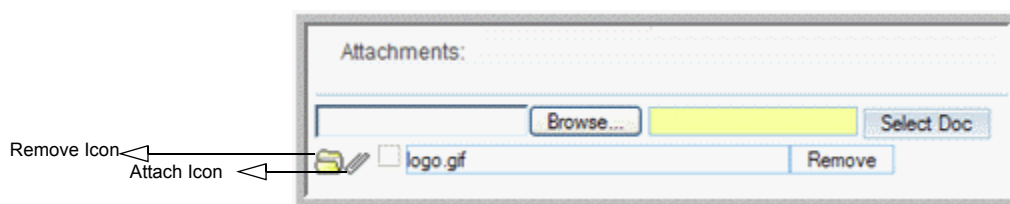
   Sugar Document. Click this button to attach a document from the Sugar repository; when you select the file from the Documents List, the system attaches it to the Email template.

9. Click **Save** to create the template; click **Cancel** to exit the page without saving your changes.

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**.

Campaigns Module

Use the Campaigns Module to track and manage mass marketing campaigns.
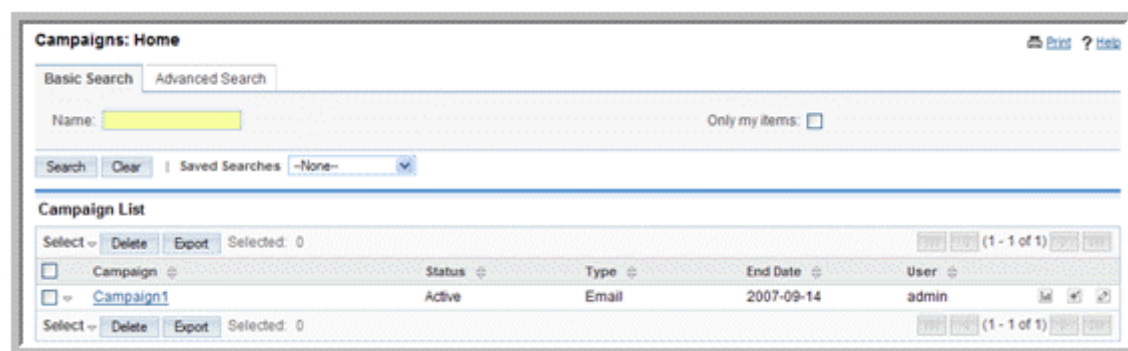
You can create many types of campaigns as described in "Creating a Campaign" on page 87.

From Contacts, Leads, and Opportunities modules, you can associate a record with an existing campaign.

Typically, 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.

Creating and Importing Campaign Targets

A target is an individual that you have some information on but does not qualify as a lead or contact. Targets are stand-alone records that are not attached to contacts, leads, or opportunities. However, you can add contacts, leads, and users to a campaign's target list.

You can add targets to a target list by importing them from a file (either CSV or TSV) or by selecting them from existing contacts and leads. For information on importing targets, see "Importing Data" on page 119.

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

The general process is as follows:

Targets ⟶ Target List ⟶ Campaign

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 the 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 need to 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.

Email

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

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 perform a mail-merge to customize the letter for each target. For more information on Word plug-in, see *Sugar Plug-in for Microsoft Word*. For more information on performing a mail merge, see "Performing a Mail Merge" on page 103.

To create a target list

1. From the Shortcuts menu on the Campaigns Home page, click **Create Target List**.

2. On the Target Lists page, enter the following information:

   Name. Enter a name for the target list.

   Type. From the drop-down list, select the target list type.

   Assigned to. Enter the name of the user assigned to this list; click **Select** to select from the User list. By default, it is assigned to you.

   Description. Enter a brief description of the target list.

3. Click **Save** to save the target list; click **Cancel** to exit the page without creating the list.

To create a target

1. In the Shortcuts menu, click **Create Target**.

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. On the Targets page, enter information for the following fields:

Target Information

> **First Name**. Enter the target's first name.
>
> **Last Name**. Enter the target's last name.
>
> **Office Phone**. Enter the target's work number.
>
> **Mobile**. Enter the target's mobile phone number.
>
> **Home**. Enter the target's home phone number.
>
> **Other Phone**. Enter the alternative phone number, if any.
>
> **Fax**. Enter the target's fax number.
>
> **Assistant**. Enter the target's assistant's name.
>
> **Assistant Phone**. Enter the assistant's phone number.
>
> **Department**. Enter the name of the department to which the target belongs.
>
> **Birthdate**. Enter the target's birth date.
>
> **Account Name**. Enter the name of the account related to the target.
>
> **Do Not Call**. Select this box to add the target's name to the Do Not Call list.
>
> **Assigned to**. Select the user who has ownership of the account related to the target.

Email Address(es). 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.

Address Information. Enter the primary address and other address information. To copy information from one section to the other, you can enter the address information on either one of the sections and click the arrow buttons.

Description. Enter a brief description of the target.

3. Click **Save** to create the target; click **Cancel** to exit the page without creating the target.

When you save the target, the target's detail page displays the Campaign Log sub-panel, which lists all the campaigns that you sent to the target.

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 .

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 .

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 .

If you have uploaded the Sugar Plug-in for Microsoft Word, you can perform a mail merge using an MS Word template. For more information, see .

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. In an Email campaign, you send out a one-time Email with the information that is of interest to your targets. In a newsletter campaign, you Email a newsletter to your targets on a regular basis. 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" on page 98.

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" on page 101.

For Email campaigns, you can embed images in your Email templates instead of sending them as attachments. This prevents your Emails from being reported as spam. For more information on embedding images, see "Creating Email Templates" on page 82.

A campaign diagnostic tool is provided to help you 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" on page 93.

Note: You must be an administrator to use the Email Setup option that displays in the Shortcuts menu.

To create a campaign

1.   From the Shortcuts menu, select **Create Campaign (Classic)**.

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. From the drop-down list, select the current status of the campaign.

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" on page 90.

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.

    The system displays the campaign's detail page. The detail page of an Email campaign or a newsletter campaign displays sub-panels for targets, tracker URLs, and Email marketing. You can create and view any of this information from the respective sub-panels.

Executing an Email Campaign

The process of executing an Email campaign consists of the following steps:

1. Create an Email campaign as described in "To create a campaign" on page 88. Alternatively, you can use the campaign wizard to create the campaign as described in "Using the Campaign Wizard" on page 93. The Campaign wizard will guide you through the steps listed below.

2. Specify the targets as described in "Creating and Importing Campaign Targets" on page 84. You can import targets, or create a new target list, or merge with existing target list. You can also select individuals from a lead report or a contact report.

3. Create an Email template containing the message you want to convey to your targets. For more information, see "Creating Email Templates" on page 82.

4. Specify an inbox for bounce-handling. This is required to handle campaign Emails that bounce back to you. Only administrators can set up mailboxes for inbound Emails. When you create a bounce-handling inbox, all bounced campaign Emails are routed to that inbox. Bounced Emails contain specific identifiers that enable you to tell them apart from Emails that are responses from your targets.

    For more information on creating a mailbox, see the *Sugar Community Edition Installation and Administration Guide*.

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" on page 91.

6. Optionally, specify one or more Tracker Redirect URLs to track campaign activities. For more information, see "To create a tracker redirect URL" on page 93.

7. Optionally, run the diagnostic tool to ensure that the Email campaign will be successfully executed. For more information, see "To run diagnostics" on page 97.

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 Campaign Targets" on page 84.

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" on page 101.

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" on page 99.

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 such as the campaign target list, the campaign Email template, and the inbox to handle Emails that bounce back to you. You must specify the Email marketing start date and time that is in the past to queue it for delivery. Any Emails that bounce back are sent to the From address defined in this record.

To create an Email marketing record

1. On the campaign's detail page, 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; select Inactive if the record is not in use. Only active records will be queued for campaign launch.

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

   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 has 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 create a new template or edit an existing 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 Web site or a *.php* file on your system.

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 for each recipient and associates it with the Email template. When recipients open the Email and click on a URL link, the system, using the unique key identifier, track each action by each recipient.

You can also provide a link to allow targets to unsubscribe themselves from your campaign mailing list. You can embed an "Unsubscribe" link in a tracker URL. When targets click on this URL to unsubscribe from your campaign Emails, the system logs the action for your records.

Note: Before you create a campaign Email, check with your system administrator to ensure that the outbound Email process is configured to send Email from your system as described in Configure System section and Mass Emailing section.

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.

You can now insert this tracker URL into an Email template of your choice. For more information, see "Creating Email Templates" on page 82.

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. In the Shortcuts menu of the Campaigns module, click **Campaign Wizard**.

   The Campaign wizard displays on the screen.

2. Select the type of campaign you want to create and click **Start**.

The screen below illustrates a Newsletter campaign.

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:
   o **Budget**. Enter a numerical value for the campaign budget.
   o **Actual Cost**. Enter the actual cost of the campaign.
   o **Expected Cost.** Enter the expected cost of the campaign.
   o **Expected Revenue**. Enter the estimated revenue from the campaign.
   o **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 their information only for that specific campaign. You can still include them in target lists for other newsletter campaigns and Email campaigns.

Tracker URL. Enter the tracker URL. For more information, see "Creating Tracker Redirect URLs" on page 92.

8. Click **Create Tracker**.

The new tracker displays below.

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, the Target Lists screen displays on the screen.

If you are creating 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.

The target list name displays 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 want 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" on page 91.

When you click **Finish**, the campaign's detail page 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. In the Shortcuts menu of the Campaigns module, click **Diagnostics**.

The Campaign Diagnostics page displays 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 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" on page 18.

- 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" on page 90.

- 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" on page 103.

- After you launch non-Email campaign such as a Telesales or a Mail campaign, you will need to manually mark the campaign 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 a 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" on page 99

- 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 Campaign List sub-panel on the Campaigns Home page, click the **Export** icon, and export them as described in "To export data from Sugar" on page 127.

- To view or manage related records in a sub-panel, see "To manage related information in sub-panels" on page 16.

Viewing Campaign Status

After you launch a campaign, you can view the campaign status to determine its success. From a campaign's detail page, you can view the status and the result of the campaign such as the number of generated leads and the return on investment (ROI). This enables you to evaluate the effectiveness of the campaign and to take 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.
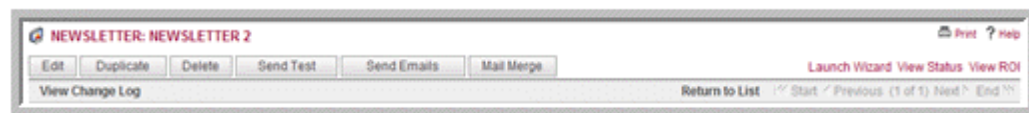
The sub-panels on the View display the following information:

- 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 are still in the queue to be sent out.

- 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 that were created as a result of the campaign. These leads are created when targets identify the campaign and, as a result, are converted into leads.

- A list of contacts 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. Note that 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 campaign status

1. To view a campaign's statistics, click the **View Status** link located below the Print icon on the Campaign detail page.

   The system displays the campaign's status.
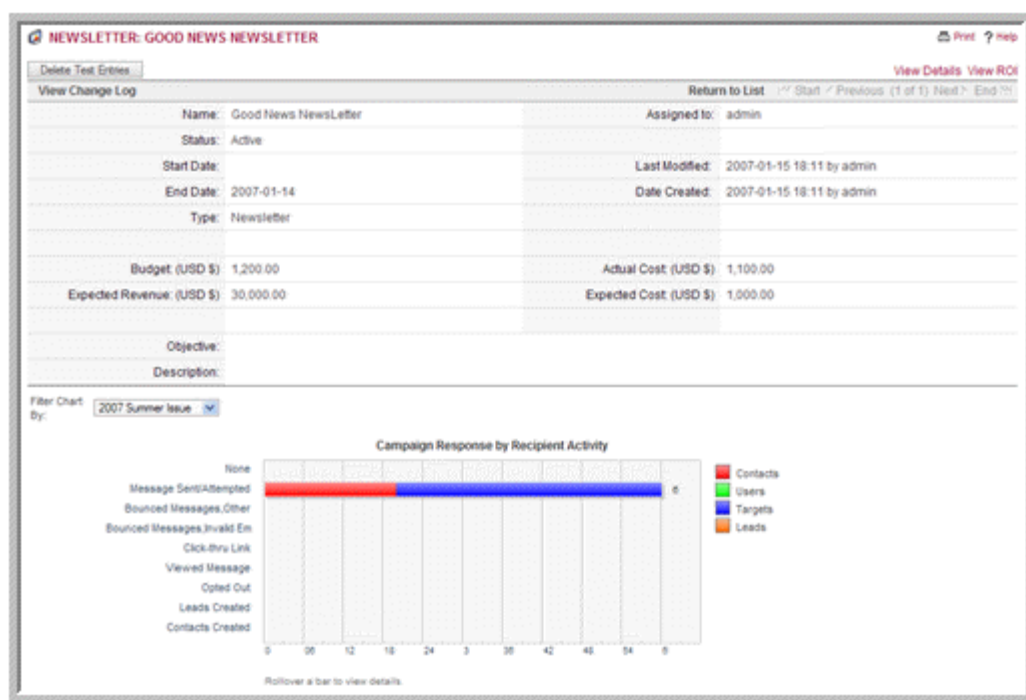
2. To return to the Campaigns home page, click **Return to List**.

3. To view the status of the first campaign on the Campaigns list, click **Start**.

4. To view the status of the campaign prior to the one you are viewing currently, click **Previous**.

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. On the campaign's detail page, click the **View ROI** option that is located next to the View Status option.

The ROI chart displays on the screen.
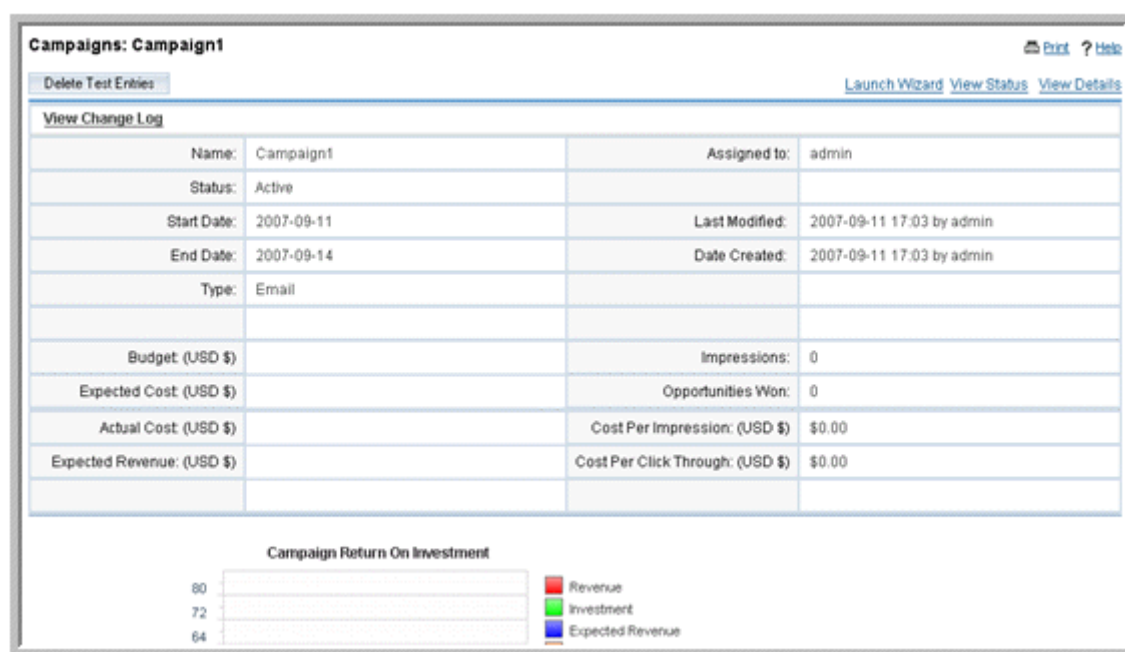
This chart displays the actual revenue versus the expected revenue generated from the campaign, as well as the actual cost of running the campaign versus the budget allocated for the campaign.

Creating Web-to-Lead Forms

To capture leads from Web-based campaigns or other Web-based sources such as your Website, you can create a Web-to-Lead form. When campaign targets fill in the form and submit it, the system saves it as lead information in the Sugar database. You can then 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 FCKEditor. To add new fields to the form, the administrator must first create new fields for the Leads module in Studio so that users can select them when they create the form.

To create a lead form

1. In the Shortcuts menu of the Campaigns module, click **Create Lead Form**.

The fields from the Leads page displays on the screen.

2. Click and drag the desired fields from the Available Fields list to the First Column or the Second Column list.

    To move all the fields, click **Add All Fields**.

3. Click **Next**.

    The Form Properties page displays on the page.

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 redirect URL. For more information, see "Creating Tracker Redirect URLs" on page 92.

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 user who is assigned to this form. To select from the Users list, click **Select**.

Form footer. Enter the form footer, if needed.

5. To create the form, click **Generate Form**.

    The system generates the form and displays it on the FCK editor.

    You can edit the form in this editor, if needed.

6. To save the form, click **Save Web To Lead Form**.

    The system saves it on your Sugar server in the *cache/generated_forms* folder. You can copy the form from the cache to a different location.

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 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:
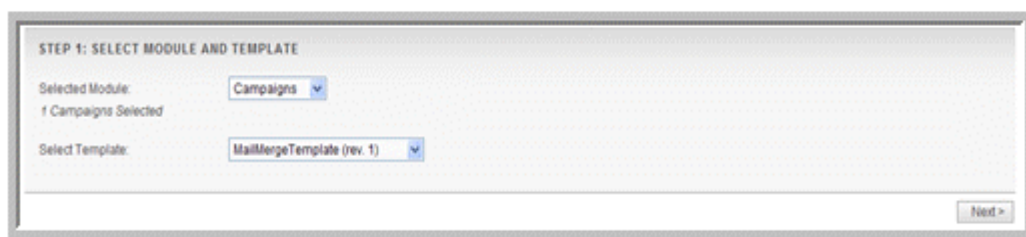
1. Ensure that your Administrator has enabled the Mail Merge option for your organization.

2. Ensure that you have enabled the Mail Merge option on your My Account page.

3. Define a template in Sugar Plug-in for Microsoft Word and upload it to Sugar.

4. In the Campaigns module, create the campaign.

5. Create your target list and populate it with targets from your list of contacts, leads, and targets. To notify your manager or other users, you can also add individuals from the Users list.

6. Perform the Mail Merge.

To perform a mail merge

1. On the Campaign's detail page, click **Mail Merge**.

    Step 1 of the Mail Merge process displays on the page.The Campaigns module is already 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**.
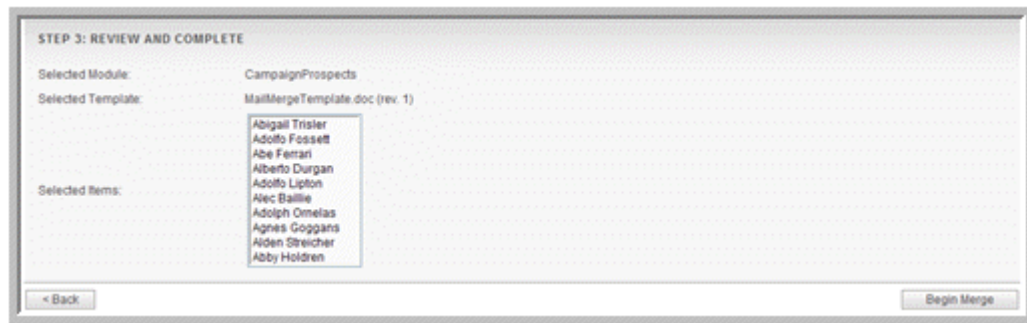
5. Click **Begin Merge**.

The following dialog box displays on the page.
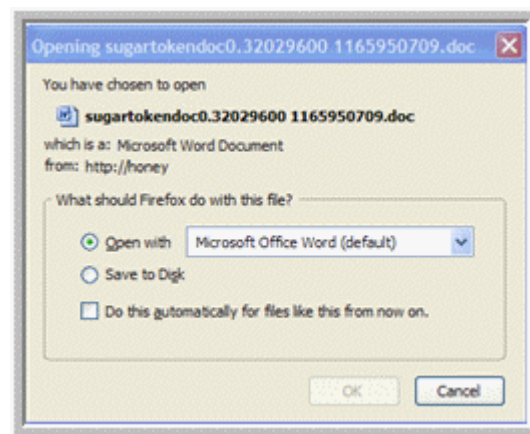
6. Ensure that Open with Word is selected and click **OK**.

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 for these campaign targets repeatedly, the system updates these log entries.

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 .

Creating a Project

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 Shortcuts menu, 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" on page 22.

- To update or delete some or all of the projects on the Projects Home page, use the Mass Update panel as described in "To edit or delete multiple records" on page 18.

- 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**.

RSS Module

Use the RSS Module to manage RDF Site Summary (RSS) feeds.
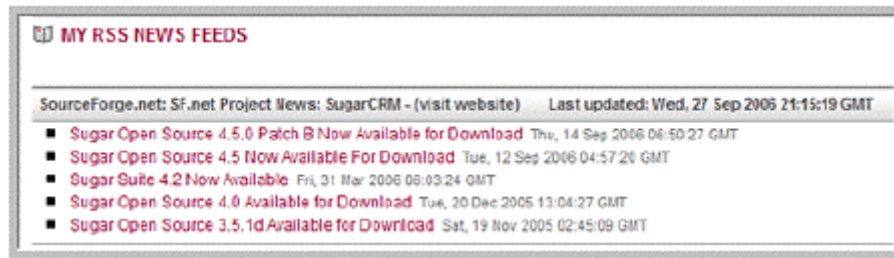
RSS feeds provide news or other web content that is syndicated by web sites which publish their content in this manner. Sugar provides hundreds of RSS feeds. You can add more through the New RSS Feed quick data entry box on the My RSS News Feeds page. This page displays all the feeds that you have marked as your favorites, and shows the latest information being provided by those feeds.

To manage your RSS feeds

- Use the ⬆, ⬇, and ➖ controls to the right side of their header bar to promote, demote, or remove a feed from the *My RRS News Feeds* screen.

- Click on the name of the feed to see information records available from that feed. Each record listed has a brief title (which is linked to the full story or content) and the timestamp of when the record was added to the feed.

- Click on a record to see the full content in a new browser window.

- Click on *Website* to go to the website associated with that feed.

- On the *All RSS News Feeds* screen, a list of all or selected RSS News Feeds from a recent search is displayed. The RSS News Feeds list is paginated if it contains more records than are displayed on the screen. Controls are provided to go to the start or end of the list, or step to the next or previous page.

- Click on the title for any RSS News Feed to display the information records currently available from that feed.

- Use the controls, to add or remove a RSS News Feed from your list of favorites.

Dashboard Module

Use the Dashboard Module to view and manage charts based on custom and predefined reports. A chart is a graphical display of report output
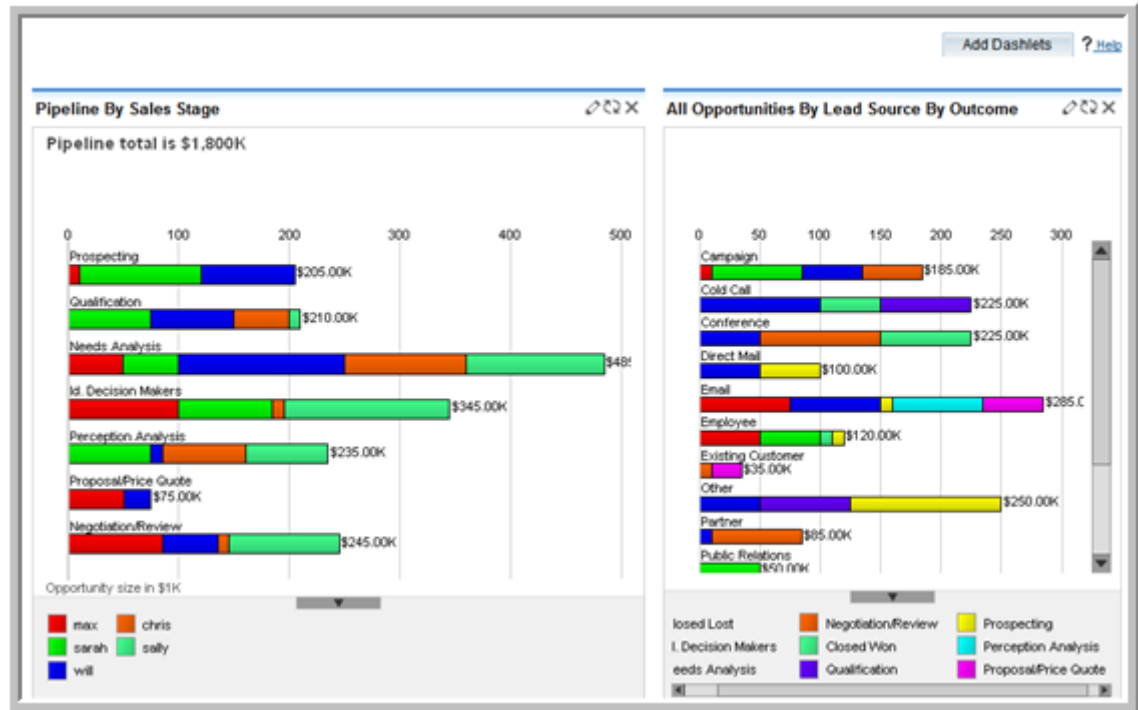
Customizing Predefined Charts

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. To enhance performance, the system does not automatically recalculated chart data each time you click the Dashboard tab. To recalculate the data source for a specific chart, click the associated **Refresh** button above the chart.

You cannot delete predefined charts but you can edit them to suit your requirements. P

Sugar provides the following predefined charts:

- **All Opportunities by Lead Source**. A pie chart of that displays the proportion of total sales opportunities for each lead source.

- **My Closed Opportunities**. A gauge chart that displays how many of your opportunities have closed to date. The phase indicates the percentage of opportunities that have closed.

- **All Opportunities by Lead Source by Outcome**. A horizontal stacked bar chart that displays total opportunities for each lead source. Each bar is made up of multi-colored segments which represent the outcome proportions for that lead source.

- **Outcome by Month**. A stacked bar chart where each bar displays the total sales pipeline for each month. Each bar is made up of multi-colored segments which represent the outcome proportions for the pipeline in that month.

- **Leads By Lead Source**. A horizontal stacked bar chart where each bar shows the value of potential sales at each stage of the sales pipeline.

- **My Forecasting**. Compares your sales quota against the committed amount and the actual amount.

- **Campaign ROI**. Displays a campaign's return on investment.

To customize a predefined chart

1. On the Dashboard home page, click the **Edit** icon on the top right corner of the chart.

   A dialog box displays the details of the report on which the chart is based.

2. Edit the details as necessary and click **Save**.

   The chart reflects the changes to the report.

Creating Custom Charts

You can view the Summation report charts that you create through the Dashboard.

To manage charts

- To ensure that the chart is displaying the latest data, click the **Refresh** icon at the top right-hand corner of the chart.

- To change the order in which the charts are displayed, click the down arrow on the Dashboard tab and select **Change Layout**. Alternatively, select the chart title and drag and drop the chart at the desired location.

- To remove a chart from the dashboard, click the **Delete** icon at the top right-hand corner of the chart.

3. To add a chart back on the dashboard, click **Add Dashlet**. The Add Dashlet window displays the list of pre-defined charts.

- To copy a chart for inclusion in a document, take a screen copy (such as by using **Alt-PrtScn** on Windows) and then crop the captured image in an image editor such as Photoshop.

Forums Module

Use this module to create forums as a means of collaboration on general, technical, or sales topics among users within your organization.

Note: Forums is not a core Sugar module. The administrator must download from it from Sugar Exchange using the Module Loader as described in the *Sugar Community Edition Installation and Administration Guide.*

Before you create a forum, you must create a topic for it. After you create a forum, you can create one or more threads of discussion on a specific opportunity, bug, or case. You can search for a thread from the Forums Home page.

To create a forum topic

1.   In the Shortcuts menu of the Forums home page, click **Create Forum**.

2.   On the Forums page, click **Create Forum Topic**.

The Forum Topics Home page displays on the screen.

3.   Click **Create**.

Fields to create a forum topics display below.

4.   Enter information for the following fields:

Forum Topic. Enter the topic title.

Order. Enter a number to specify the order in which it displays in the Topic drop-down list when you create a forum. For example, if you enter "2", the topic will be the second one from the top in the drop-down list.

5. Click **Save** to create the topic; click **Save & Create New** to save the topic and create another one.

To create a forum

1. On the Forums Home page, click **Create Forum** in the Shortcuts menu.

2. Enter information for the following fields:

    Title. Enter a name for the forum.

    Topic. From the drop-down list, select a topic.

    Description. Enter a brief description of the forum.

3. Click **Save** to create the forum; click **Cancel** to exit the page without creating the forum.

    The new forum is now listed on the Forums Home page under the topic name. You will need to view the forum's detail page in order to create a thread.

To create a thread

1. On the Forum's detail page, click **Create New Thread**.

2. On the Threads page, enter information for the following fields:

    Title. Enter a topic title for the thread.

    Sticky. Select this box to create a sticky thread.

    A sticky thread will always be at the top of the Thread list. When there are multiple stickies, the system lists the latest one at the top of the Thread list, followed by the others.

    Body. Enter your comments on the topic.

    To view and use the HTML editor, click the **HTML** link in the Toolbar.

    Highlight the text and click buttons on the toolbar to apply standard formatting options such as font face, size, bold, italics, indentation and color. Additional buttons insert rules, hyperlinks, pictures, table and display the HTML source code.

3. Click **Save** to create the thread; click **Cancel** to exit the page without creating the thread.

    The thread is now listed in the Threads List on the forum's detail page.

To manage a forum

●   To search for a thread or a posting, specify the title or the user in the Threads/ Posts Search panel on the Forums Home page and click **Search**.

●   To view the details of a forum, click its title from the list on the Forums Home page.

●   To edit the information, on the detail page, click **Edit**, make the changes, and click **Save**.

●   To delete a forum, on the detail page, click **Delete**.

Employees Module

Use the Employees module to view information such as name, title, and Email address for employees in your organization.

Users who are not administrators can view employee information, contact employees, and export employee information to their local machine. However, they cannot create or manage employee information.

While all users are employees, not all employees are users. To be a user, an employee needs a username and password to log into Sugar. As an administrator, you can convert an employee into a user and specify the username and password for the employee. You can also edit employee details such as home address, Email address, and phone number.

To create an employee

1.   Log into Sugar as an administrator.

2.   Click the **Employees** option located at the top right-hand corner of the page.

3.   In the Shortcuts menu of the Employees Home page, click **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:

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.

To manage employee records

- 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.

- To export employee information, click the **Export** link located in the Employees sub-panel and follow the process detailed in "To export data from Sugar" on page 127.

- To edit the status of multiple employees, use the Mass Update panel as described in "To edit or delete multiple records" on page 18.

- To edit an employee's record, on the detail page, click **Edit**, update the information, and click **Save**.

- 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.

  Note: You cannot delete an employee record.

- To go back to the Employees Home page from a detail page, click **Employees** in the Shortcuts menu.

To convert an employee into a user

1. On the employee's detail page, click **Create User**.

2. Specify a user name to enable the employee to log into Sugar.

3. Click **Change Password**, specify a password for the user name, and click **Save**.

4. Send an Email notification to the employee with the username and password information.

Chapter 4

Importing and Exporting

This chapter discusses how to import data into Sugar and how to export data from Sugar to your local machine.

Topics include:

- **"Importing Data" on page 119**
- **"Exporting Data" on page 127**

Importing Data

You can use the import functionality to import new data into Sugar as well as to update existing data.

You can import data from CRM systems such as Salesforce.com, Contact Managers such as ACT!2005, and from Microsoft Excel. The import file can be a comma delimited or tab delimited file.

To import data from your previous CRM application or Contact Manager, you must first export the data from that application in a Comma Separated Values (.csv) file format to your local file system. You can then use the import function within a specific module to import the CSV file data into Sugar.

You can import data for the following Sugar modules:

- Accounts: You can import from comma delimited, tab delimited files, custom delimited file, Jigsaw, Salesforce.com, and ACT!.
- Contacts: comma delimited, tab delimited files, custom delimited file, Microsoft Outlook, Salesforce.com, and ACT!.
- Leads, Opportunities, Projects, and Cases: You can import from comma delimited, tab delimited files, custom delimited files, and Salesforce.com.

Note: Your administrator must enable import for the Projects module.

- Targets: You can import from comma delimited, tab delimited files, and custom delimited files.

- Notes: You can import from comma delimited, tab delimited files, custom delimited files, and Salesforce.com.

Mapping Data and File Settings

When you import data, you will need to map fields that you are importing with fields that exist in the Sugar database. For example, to map the first and last names of contacts that you import into Sugar, these fields must exist in the Sugar database. If not, you will need to create these fields in Sugar before you import the data.

The last stage of the import process provides the option to view your default file settings under Advanced Options. Advanced Options lists the default settings on your My Account page. Ensure that the File Encoding format, the Date format, and the Time format match those in the import file. If not, change the settings under Advanced Options before you import the data. For example, if the import file is using EUC-JP and your default setting is UTF-8, you will need to change the default setting to EUC-JP.

File Encoding allows you to use an import file that is in another language. That is, a file with a different character encoding than what is specified for the Sugar instance. During the import, if the user selects the appropriate file encoding, then the data will be converted to the encoding specified for the Sugar instance.

You can save mappings for future use. You can also publish saved mappings to enable other users to use them.

In order to update records, you must ensure that the import file contains record IDs.

Importing Account Data

If you are importing account data from another CRM system, then, typically, that system understands the distinction between a contact and an account – that one account can have multiple contacts – and has separate data for each. However, you can only import contact data from a simpler Contact Manager application– such as Microsoft Outlook.

To import account data

If you are importing account data from a CRM system, proceed to step 4. If you exported contact data, and need to massage it to act as account data to be imported, perform steps 1-4 below:

1. Copy your exported *contacts.csv* file and save it as *Accounts.csv.*

2. Edit the *Accounts.csv* file using Excel. First, sort the file on the column which contains the company name.

   As you scroll through your data, sorted by company name, you may see successive records which have the same company name if there is more than one contact from that account (in Sugar's terminology). To avoid multiple copies of the same account within Sugar, you need to delete the duplicate contacts. And to make sure that the most complete information is attached to the account record, retain only the contact whose address and telephone information best represents the account as a whole.

Also look out for company names which are similar but not identical due to inconsistencies in the way the company name was entered – you should delete all duplicate records except the one with the company name spelt exactly how you want to see it in Sugar.

3. Save the Excel file as a *.csv* file type.

4. In the Shortcuts menu of the Accounts module, click **Import** and follow the process described in **"To import data" on page 122**.

After the account data has been imported, you can export contacts from your current Contact Manager and then import it into Sugar.

Importing Contact Data

If you import a contact record that refers to an unknown account, then a new contact record is automatically created for an account of that name. Note that when account records are created automatically in this fashion, they are empty. That is, they have associated contacts but no address or telephone information. Therefore, you will need to manually add those details later. To avoid this task, it is recommended that you import the account data first to create complete records with address and telephone information (and other information depending on your previous CRM system) and then import contact data.

To export contacts from your current contact manager

The process below describes exporting contact information through Outlook 2003. Other systems work in a similar manner.

1. Under the File menu, select **Import and Export**.

   The Import and Export Wizard dialog box displays on the page.

2. Select **Export to a file** and click **Next**.

3. Select the option to create a file of the type Comma Separated Values (Windows), and click **Next**.

4. Select an Outlook folder from which to export – typically your contacts folder - and click **Next**.

5. Enter the filename and directory location for the exported file to be created, and click **Next**.

6. To confirm your intention to export this file, click **Finish**.

   Outlook 2003 creates a CSV file. To ensure that the data has been exported successfully, you can view the file using Microsoft Excel or a text editor.

Now you can import the contact data as described in **"To import data" on page 122**.

During import, ensure that you correctly map the names of the incoming fields with the names of the corresponding Sugar fields. If you are importing from Outlook, a particularly important field mapping is the incoming Company field to the Account Name field within Sugar. This is required to ensure that contacts are associated with the correct accounts.

To import data

1. In the Shortcuts menu of the module's home page, click **Import**.

    The first step in the import process displays on the screen.

    Import Step 1: Select Data Source and Import Action

    What is the Data Source? *

    ⊙ Comma delimited file 🔍

    Fields Qualified By: [Double Quote ["] ▾] 🔍

    ○ Tab delimited file 🔍

    ○ Custom delimited file 🔍

    ○ Salesforce.com

    ○ Act!

    Import Action *

    ⊙ Create Records

    ○ Create and Update Records

    [Next >]

    ---

2. Select one of the following as the data source:

    Comma Delimited File. Select this option if the fields in the import file are separated by a comma or if the file is in .csv format.

    Fields Qualified By: Identify the qualifier, if any, enclosing each field including delimiters in the import file. When you export Sugar records, the system uses double quotes as the qualifier.

    From the drop-down list, select one of the following:

    > **None**. The import file does not contain any qualifiers.
    > **Double Quotes**. The import file contains double quote as qualifiers. For example: *"abc","xyz", "efg"*.
    > **Single Quotes**. The import file contains single quotes as qualifiers. For example: *'abc','xyz','efg'*.
    > **Other**. The import file contains a qualifier other than single quotes or double quotes.

    Tab Delimited File. Select this option if the fields in the import file are separated by a tab and the file extension is .txt.

    Custom Delimited File. Select this option if the import file uses a delimiter other than a comma or a tab. Enter the delimiter in the **Fields Delimited By** field and enter the delimiter in the adjacent field.

Salesforce.com. Select this option if the import file is located in the Salesforce.com database. Instructions to import from Salesforce display on the screen.

Act!2005. This option is available only for Sugar modules that are mapped to a corresponding module in ACT and the import data is located in the Act! 2005 database.

3. Under Import Action, select one of the following:

    Create Record: Select this option to create new records

    Create and Update Record: Select this option to create new records and update existing records with new values.

4. Click **Next** to proceed to the next step in the import process.

    You must now upload the file that you saved on your local file system. Depending on the specified data source, the information you see on this page will vary. The screenshot below displays for the comma delimited option.

5. In the Select file field, enter the path to the file location; or click **Browse** to navigate to the file location on your machine.

6. If the file has a header row, check the **Has Header** box.

    Typically, a header row contains column titles such as Name and Address.

7. Click **Next** to proceed to the final step in the import process.

    The page displays the mapping between the fields in the Sugar database and the headers in the import file.

    The Database Field column displays a drop-down list of all fields that exist in the Sugar database for the module. For unmapped fields, the Do not map this field option displays in the Database Field column. You can change the mapping if needed. If you want to ignore a field, select **Do not map this field**.

    The Header Row column displays the field titles in the header row of the import file.

    The Default Value column provides the option to enter a value if the import file does not contain a value for the field. Row 1 displays the data from the first non-header field in the import file. If the datetime format in the import file is different

from your default datetime format in Sugar, you can change your default datetime format with the Advanced Options option located at the bottom of the page.

8. To add additional data to a record for which the import file does not have a corresponding field, scroll down to the bottom of the page and click **Add Field**. Select an existing field in the Sugar database from the drop-down list and enter its value in the corresponding Default Value field.

    The field with the new value is added to the list of database fields; to remove it, click the corresponding Remove Field button.

9. To save the mapping as a custom mapping that you can use repeatedly, scroll down to the bottom of the page and enter a name in the **Save Mapping as** field.

    Saved mappings are listed on the first page of the import process.

10. To modify the datetime format or other settings to match those in the Import file, scroll down to the bottom of the page and click **Show Advanced Options**.

    Advanced Options displays the default settings, including the datetime format, from your My Account page. You can change the default settings if necessary.

11. To check for duplicate entries, click **Show Advanced Options**. For fields such as Assigned users, move the desired indexes from the Index(es) Not Used column to the Index(es) Used column using the left arrow button.

    To remove an index that you do not want to check, use the right arrow to move it back to the Index(es) Not Used column. Use the up and down arrows to sort the order in which the indexes are checked for duplicates.

12. Click **Import Now** to import the data.

The Import Results page lists the imported data and lists how many fields were successfully imported and how many were skipped.

If the import is unsuccessful or partially successful, the following page displays on the screen.

You can click the link to view the rows that were not imported and the error messages. You will be prompted to download the .csv file containing the information.

13. If you do not want to save the imported data because the field mapping is incorrect, click **Undo Last Import**; You can click **Try Again** to restart the import process from the beginning.

The system will not duplicate the record when you restart the import process.

14. To import additional data, click **Import More**.

15. To return to the module's home page, click the **Return to** button. The screenshot above displays the Return to Contacts button.

To manage saved mappings

- To use a saved mapping, on the Import page, select the mapping before proceeding to Step 2 of the import process.

- To publish a mapping that you saved, on the Import page, select the mapping and click **Publish**.

The mapping is now listed on the Import page of your team members. They have the option of deleting it, if needed.

- To un-publish a mapping that you published, click **Un-publish** on the Image page.

The mapping is now no longer available to other members of your team.

Exporting Data

You can export Sugar item records in *.csv* format to your local machine. You can use Microsoft Excel, Notepad, or other text editors to open *.csv* files. You can export selected records, all records on the page, or the entire list.

A sample portion of a CSV file, exported from the Accounts module and viewed in Excel, is shown in below. 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 other fields which Sugar uses internally.

To export data from Sugar

1. On the module's home page, click the Export icon located above the item list.

2. Select from the following Export options:

    Selected Records. To export one or more records on the list, select the records from the list, and select this option.

    Current Page. To export all the records listed on the page, select this option.

    Entire list. To export all records on the list (which could be more than a page long), select this option.
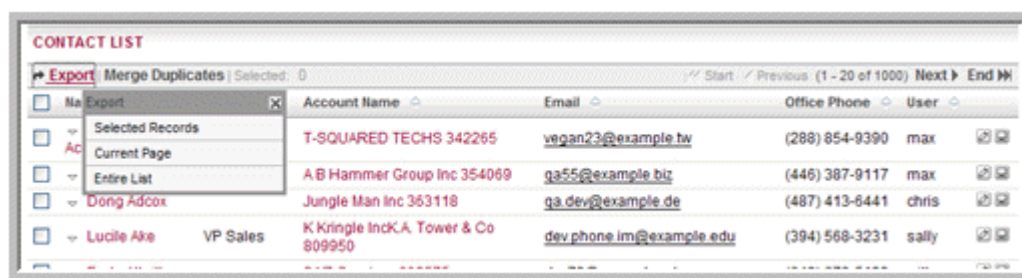
3. In the File Download dialog box, select **Open** to open the export file in *.csv* format.

4. Click **Save** to save it on your local machine; click **Cancel** to exit the dialog box without saving the file.

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