SUGAR SUITE™

Sugar Open Source

User and Administrator Guide

Version 4.2
March 2006

SUGARCRM®
COMMERCIAL OPEN SOURCE

Original version authored by the Long Reach Corporation

This document is subject to change without notice.

License

Disclaimer

Trademarks

Table of Contents

List of Figures

Welcome to Sugar Suite

Thank you for using Sugar Suite, created by SugarCRM Inc. The Sugar Suite edition is designed to help you enable your organization to efficiently organize and maintain information which is crucial to many aspects of your business.

- Sugar Suite 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 also offers a graphical Dashboard to track your sales pipeline, the most successful lead sources, and the month-by-month outcomes for opportunities in the pipeline.

Most importantly, the system seamlessly blends all of these capabilities into an intuitive and friendly tabbed interface.The instructions in this Guide will introduce you to some basic Customer Relationship Management (CRM) concepts and help you get familiar with the fundamentals of using your Sugar Suite system.

Sugar is an open source project, and as such, advances quickly through the development and contribution of new features by its entire supporting community, of which SugarCRM Inc. and many other organizations and individuals are proud to be a part. Welcome to the community!

About this Guide

This Guide is current with the details of operation for Sugar Suite 4.2. It is designed for users who are new to Sugar Suite, or the areas of customer relationship management and web-based applications. The information in this Guide describes how to use a personal computer and a web browser to access Sugar Suite to perform a broad range of corporate information 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 Internet browser software, such as Microsoft Internet Explorer or Mozilla Firefox.

Who Should Read this Guide?

This *Sugar Open Source User and Administrator's Guide* provides information primarily 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.

About Sugar Suite

Sugar Suite enables organizations to efficiently organize, populate, and maintain information on all aspects of their customer relationships. The system seamlessly blends all of the functionality required to manage information on many aspects of your business into an intuitive and friendly tabbed user interface.

Core Features

Customer Relationship Management

- Account creation and management, with any number of Contacts associated with each Account.
- Activity history (Meetings, Calls, Tasks, Notes with optional file attachments, and Emails) is tracked for Contacts, Accounts, Leads, Opportunities and Cases.
- Tasks may be assigned to users, and automatic email notifications may optionally be sent to advise users of new tasks.

Sales Force Automation

- Summary view of upcoming Appointments, top Opportunities, open Cases, Leads, open Tasks, assigned Bugs, sales pipeline graph, monthly calendar, and a quick contact entry facility.
- Sales Lead creation and tracking, and conversion of sales Leads into Opportunities.
- Graphical Dashboard display of Opportunities Pipeline, Lead Sources & Outcomes.

Customer Service Tracking

- A case management system that allows users to track customer problems and resolutions. Allows each problem to have a lifecycle of information to improve customer satisfaction.
- Each case links to the related Account, Contacts, Notes, associated files, plus Call and Meeting activity history.
- A bug tracking system for managing bugs reported against different revisions of software.

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.

Corporate Calendar

- Calendar view (by Day, Week, Month, or Year) of all corporate Activities, with an associated Task list.
- Shared calendar for viewing other user’s calendars for avoiding scheduling conflicts.

Interface Consolidation

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

Sugar Suite 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 and Enhanced in 4.2

With each revision of the Sugar Suite software, significant advances are made in both the feature set and usability of the software. Here are some of the highlights of version 4.2 of the software, as compared to the previous version.

Document Management

Sugar Suite now displays relationships between documents that are related to each other. For example, you can view the relationship between a Master Service Agreement and related Statements of Work.

Campaign Management

- You can now embed multiple tracking URLs within an outbound campaign email. This enables you to establish multiple click-thru destinations from a single email. You can also create suppression lists based on email addresses, domain names, or user ID.

Outbound Email

- New Admin configuration settings provide control over outbound email formatting and the desired tool for composing emails.
- Users can now attach Sugar documents directly to emails.
- Users can use Sugar Suite as their personal email client to communicate with customers.
- Users can specify the email client they want to use, the email format (HTML or plain text), and the use of their signatures.

Inbound Email

- Inbound Email now includes a new personal inbox, signature support, and enhanced administrative control over email functions across Sugar Suite.

Administration

A new diagnostics tool enables system administrators to capture and report vital configuration information.

The System Settings section now displays key parameters from the *config.php* file to enable administrators to view and edit them directly from Sugar Suite.

A new log display utility in System Settings allows controlled access to the Sugar Suite log file.

The layout of the Admin area has been changed to improve usability.

User Interface

In list views, you can now access the Edit and Detail views directly from the Additional Details box.

In edit views and on quick-add screens, missing values for required fields are prominently displayed.

Checkboxes in list views are now preserved across multiple list view pages. Operations using those checkboxes, such as mass updates and mail merge, act uniformly. Users also have the option to extend the selection as appropriate.

You can now use the drag-and-drop procedure to rearrange dashboard charts.

Numeric values are now formatted according to user preferences specified in My Account or through the User Management option in Admin. These values are right-justified in list views and sub-panels.

Getting Started

This Guide assumes that the resources you need to access the system are available 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.

Technical Requirements

Before you begin using the system, ensure that you have the required software installed and configured on your system. You will require the following:

- **A current web browser running on your computer.**

  Sugar Suite has been tested with and supports a variety of browsers. The following browsers are known to work with Sugar Suite:

  - Mozilla version 1.7 and higher - www.mozilla.org/mozilla1.x
  - Firefox version 1.0 and higher - www.mozilla.org/firefox
  - Microsoft Internet Explorer version 5 and higher - www.microsoft.com/ie

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

- JavaScript and cookies support enabled in your web browser.

  Both JavaScript and cookies 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 JavaScript support and cookies support are enabled. Click *Tools* > *Internet Options* > *Privacy* and *Security* tabs in Internet Explorer, or *Tools* > *Options* > *Privacy* and *Web Features* tabs in Firefox.

- Network access to a server that is running the Sugar Suite software.

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

Web Browser and Window Controls

Sugar Suite dynamically creates the HTML screens displayed by the web browser when you click certain buttons in the web pages.

Using the web browser's Back and Forward buttons can cause problems displaying these dynamically generated pages. For this reason, it is not recommended to use these controls on your browser when using Sugar Suite.

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

Tip

Hold down the CTRL key in Mozilla Firefox or the Shift key in Windows Internet Explorer while clicking on a link to open a new browser window when navigating throughout the application. This is a useful navigation technique when viewing many records in a list view or in a report.

Accessing Sugar Suite

To access Sugar Suite, type the URL into your web browser's address bar. A screen displays which is similar to the one shown in following figure:

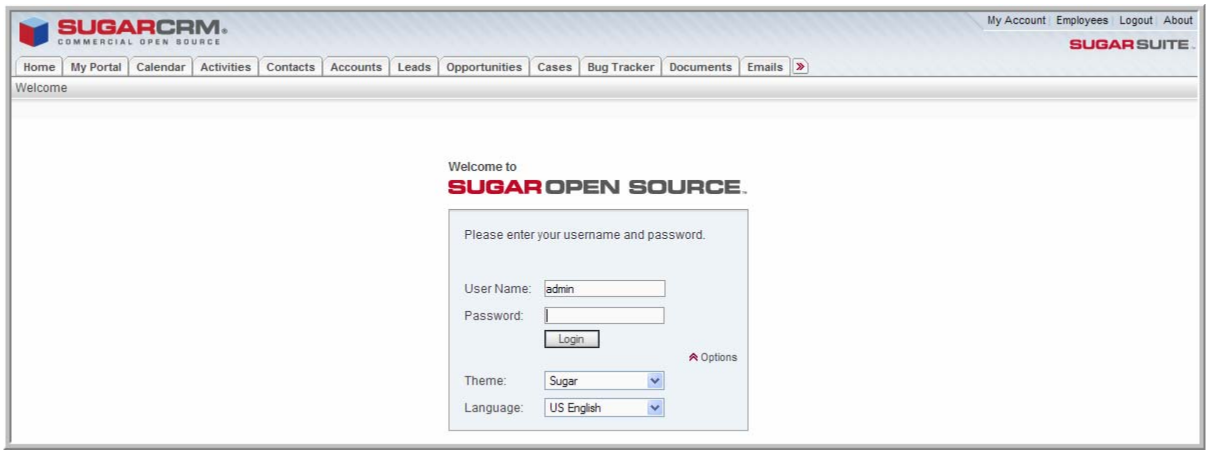


Figure 1: Sugar Open Source Log In Screen

This is the Sugar Suite log in screen. If you do not see a log in screen, verify that you have typed the URL correctly, or contact your system administrator to verify that you have the correct URL.

To proceed, you must log in to the system by providing a valid user name and password.

You may 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/.](http://www.sugarforge.org/)

Logging In

Your system administrator assigns log in information – a user name and password – to every system user. If you have not received your user name and password combination, contact your system administrator.

If you do not provide the correct user name and password, Sugar Suite does not allow you access to the system.

To log in to the system:

1. In the Sugar Suite log in screen, type your user name in the User Name box.

Tip: System passwords are case sensitive. "John differs from "john".

Tip: System passwords must be at least 6 characters long and contain at least 1 numeric character.

2. Type your password in the Password box.
3. Select the language and theme that you want to use (if applicable).
4. Click the Log In button.

If you cannot log in, check the following:

- Verify that your user name and password were typed correctly, including any capital letters.
- Contact your system administrator to verify that you have the correct user name and password combination.
- Your account may have been disabled. Contact your system administrator.

Security Timeout

For security reasons, the system automatically logs you out of the system if you do not perform any tasks for a period of time. By default, the system does not log you out until 30 minutes have elapsed without any activity. (This feature can be turned off, or the time period changed, via PHP configuration parameters.)

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

Managing Your Password

When you are first given access to the system, your administrator will provide you with a password. For security reasons, you should change this password to another one that only you know. Ensure that you choose a password that is easy for you to remember, but difficult for another person to guess.

You can change your password at any time. It is a good idea to change your password occasionally.

To change your password:

1. Click the My Account link that appears at the top right of your screen whenever you are logged in to the system.
2. On the My Account screen, click on the Change Password button.
3. In the Change Password dialog box which appears, type your new password in the New Password box, and again in the Confirm Password box.
4. Click the Save button.

If you forget your password, you must contact your system administrator, who will reset it to a value which you can use temporarily. You should then log in to the system, and change the password to another value of your own choosing, according to the procedure described above.

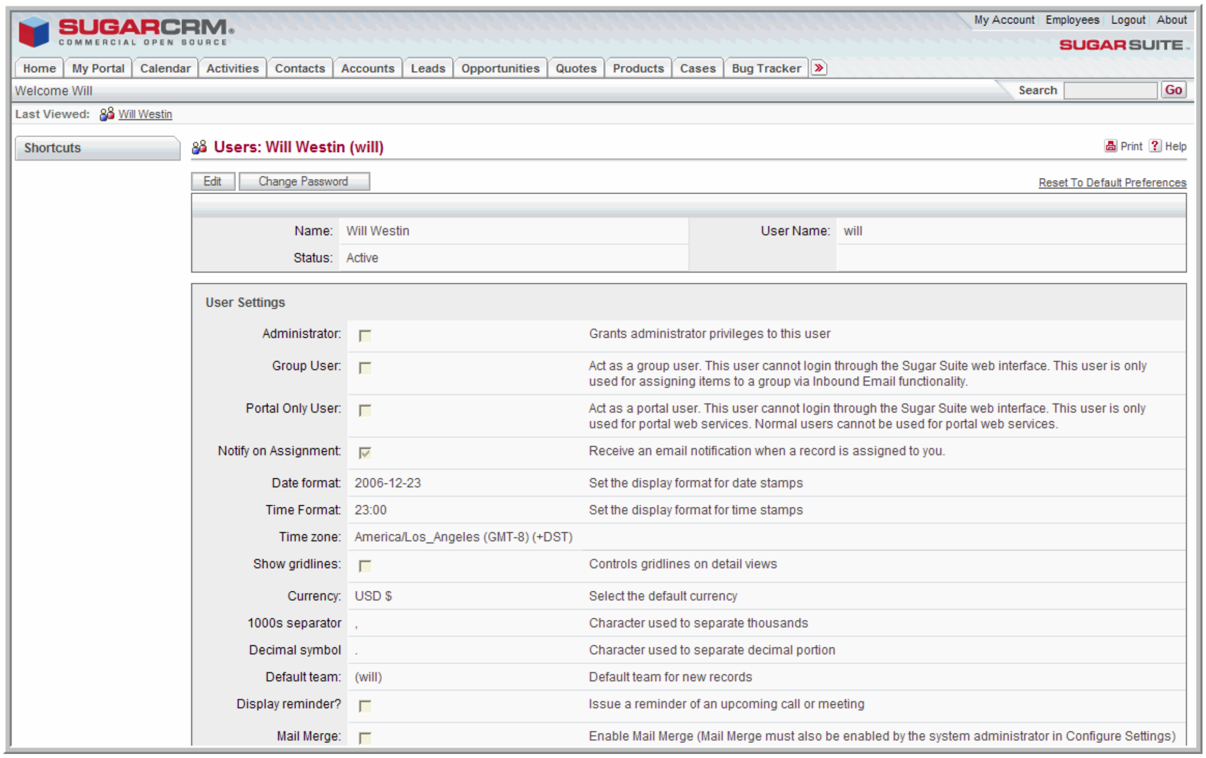


Figure 2: My Account Screen

User Interface

When you log into the system, the Home screen displays. Various key elements of the screen layout are highlighted on the following figure:

- System Links: My Account, Employees, Logout, and About. The Admin link is only available to users defined as administrators.
- Module Tabs: Click to choose a module (such as Cases, Opportunities, etc.) to view the list view. A dropdown menu lets you select other modules if you have more than 12 tabs.
- Search Box: Search for a text string within key data held by Sugar Suite.
- Last Viewed: A useful trail of recent records you have viewed.
- Shortcuts Box: Specific shortcuts useful within each module.
- Quick New Item Box: Quick data entry box to create a new item for the current module.
- My Inbox: The My Inbox is populated by items from the Inbound Email feature. See the System Administration, Inbound Email section for more information.
- Monthly Calendar and a Pipeline graph.

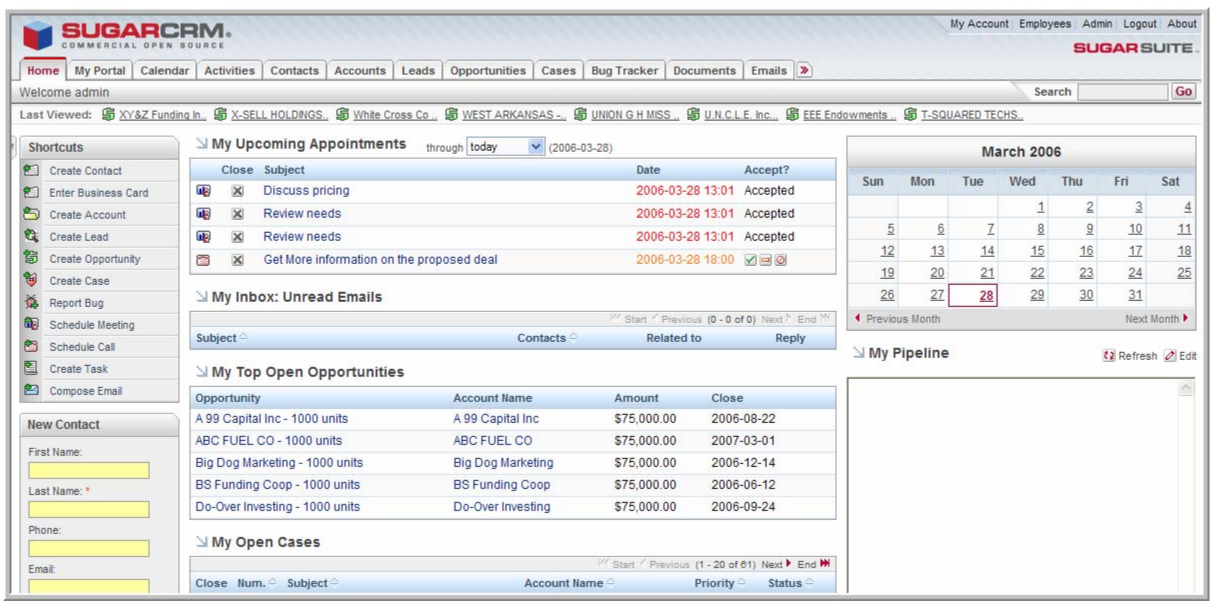


Figure 3: Home Screen

The Home screen layout uses the same layout as all of the other tabs. The screen layout features and capabilities include the following:

- As you move between the tabs, the shortcuts change according to the specific tab, and the main screen body displays the information indicated by the tab name.
- The Quick New Item box changes to offer quick access for creating new items based on the tab, for example, New Contact, New Account, New Opportunities, and so on.

Module Tabs

From the Home tab, you can access any module by clicking on the tab related to its name. Modules help you work more efficiently by grouping the tools and functions you need to perform specific tasks. Some themes display the modules as links on the left side of the user interface instead of tabs. This document refers to the tabbed interface.

Tip

Not every module has a screen tab. For instance, the Notes, Emails, Tasks, Calls, and Meetings modules are all grouped together in the Activities tab.

Module Description

Sugar Suite consists of the following modules:

- Home

  The Home tab contains a general overview of Cases, Opportunities, Appointments, Leads, Tasks, Calendar and Pipeline. It also includes shortcuts to enter most sorts of data, and a quick form for new contacts. The Home tab provides a quick overview of what customer tasks and activities you need to focus on today.

- My Portal

  My Portal contains a series of shortcuts which can link to any web site you choose. This is commonly used to include email, forums, or any other web-based application, allowing Sugar Suite to become a single user interface for multiple applications.

- Calendar

  View scheduled activities (by day, week, month or year), such as meetings, tasks, and calls. Being able to share your calendar with your coworkers is a powerful tool for coordinating your daily activities.

- Activities

  The Activities tab allows you to create or update scheduled activities, or to search for existing activities. Sugar Suite allows you to manage the myriad of calls, meetings, notes, emails and tasks that you need to track in order to get your job done.

  - 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.
  - Calls allow you to track all of your phone calls with leads and customers.
  - Meetings are like calls, but also allow you to track the location of the meeting.
  - 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.

- Contacts

  View a paginated contact list, or search for a contact. You can click on a specific contact to zoom in on the detailed contact record. From a specific contact record, you may link to the related account, or leads, opportunities, cases, or direct reports (related contacts).

  Contacts are the people with whom your organization does business. As with accounts, Sugar Suite allows you to track a variety of contact information such as title, email address, and other data. Contacts are usually linked to an Account, although this is not required.

- Accounts

View a paginated account list, or search for an account. You can click on a specific account to zoom in on the detailed account record. From a specific account record, you may link to related contacts, activities, leads, opportunities, cases, or member organizations.

Accounts are the companies with which your organization does business. Sugar Suite allows you to track a variety of information about an account including website, main address, number of employees and other data. Business subsidiaries can be linked to parent businesses in order to show relationships between accounts.

- Leads

  View a paginated list of leads, or search for a specific lead. You can click on an individual lead to zoom in on the lead information record. From that detailed lead record, you can link to all related activities, and see the activity history for the lead.

  Leads are the people or companies with whom your organization might do business in the future. Designed to track that first point of interaction with a potential customer, leads are usually the hand off between the marketing department and the sales department. Not to be confused with a contact or account, leads can often contain incomplete or inaccurate information whereas contacts and accounts stored in Sugar Suite are core to many business processes that require accurate data. Leads are typically fed into the Sugar Suite system automatically from your website, trade show lists or other methods. However, you can also directly enter leads into Sugar Suite manually.

- Opportunities

  View a paginated list of opportunities, or search for a specific opportunity. You can click on an individual opportunity to zoom in on the Opportunities information record. From that detailed Opportunities record, you can link to all related activities, see the activity history for the opportunity, and link to related leads and contacts.

  Opportunities track the process of selling a good or service to a potential customer. Once a selling process has commenced with a lead, a lead should be converted into a contact and possibly also an account. Opportunities help you manage your selling process by tracking attributes such as sales stages, probability of close, deal amount and other information.

- Cases

  View a paginated list of cases, or search for a specific case. You can click on an individual case to zoom in on the case information record. From that detailed case record, you can link to all related activities, see the activity history for the case, and link to related contacts.

  Cases are the handoff between the sales department and the customer support department. Cases help customer support representatives manage support problems or inquiries to completion 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.

- Bug Tracker

  View a paginated list of reported software bugs. You can click on an individual bug to zoom in on the detailed bug report. From that detailed bug report, you can link to all related activities, see the activity history for the bug, and link to related Contacts, Accounts, and Cases.

  Tracking software bugs is an important function of a customer support department. The Bug Tracker module helps customer support representatives 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.

- Documents

The Documents tab shows you 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.

- Emails

  The Emails tab allows you to write and send emails and to create Email Templates that can be used with email-based marketing campaigns. You can also save drafts and archived emails.

- Campaigns

  The Campaigns tab helps you implement and track marketing campaigns. Campaigns may be telemarketing, mail or email based. For each Campaign, you can create the Target List from your Contacts or Leads or outside file sources.

- Projects

  The Projects tabs helps you manage tasks related to specific projects. You can track and manage tasks for a project. 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.

- RSS

  View the latest headlines provided by your favorite RDF Site Summary (RSS) feeds. These feeds provide news or other web content that is distributed or syndicated by web sites which publish their content in this manner. The system has hundreds of RSS feeds available as supplied, and others may easily be added.

  Yahoo, ZDNet, Wired, Slashdot, Washington Post, The Telegraph, The Seattle Post, Reuters, New York Times, InfoWorld, Boston Globe, CBS MarketWatch, ABC News, BBC News – you can make them available to create your own custom news-gathering experience.

- Dashboard

  The Dashboard tab displays a graphical dashboard of your Opportunities Pipeline by Sales Stage, Opportunities by Lead Source by Outcome, Pipeline by Month by Outcome, and Opportunities by Lead Source.

Selecting a Module

To select a module when the Home tab displays:

- Click on the tab which shows the name of the module you want to use.

Tip

The Module tab is always available at the top of the browser.

Navigating the Module Screens

All of the Task module screens use the same basic layout – making it easy for you to move from one area of the application to the next.

List View Screen

Most module screens (Home, Calendar and Dashboard are exceptions) have two key elements to them – a search filter capability at the top, and a list view of items below. Generally, the search filter has basic search fields, and a link to use the advanced search with more fields on which to filter the list of items below.

List view searches

When working with the list view, you can work with the complete list, or use the search filter to reduce it to a more manageable size. To use the search filter, type in one or more boxes and then click on the Search button. Text entered in search fields needs to match from the beginning of the value stored in each record – for example "fred" will match Frederick, but not Alfred, in a first name field. 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. Wild card search characters are not needed and not supported. In other words, searching for "fred*" would only match first names like "Fred*erick" or other "Fred" names containing the asterisk (*) character.

System-level searches

Using the system level search box is much the same, only it searches Contacts, Accounts, Leads, Opportunities and Cases, and looks for search text to match from the beginning of key fields for each, as below. Note: numeric search strings will match anywhere in a field. Then all matching records are displayed in a series of paginated lists.

Contacts: First Name, Last Name, Email, Other Email, Home (phone), Mobile (phone), Office Phone, Other Phone, Fax, Assistant, Assistant Phone

Accounts: Account Name, Phone, Other Phone, Fax

Leads: First Name, Last Name, Account Name, Email, Other Email, Home (phone), Mobile (phone), Office Phone, Other Phone, Fax

Opportunities: Opportunity Name

Cases: Search by one case number, a list of numbers (delimited by commas, e.g., 2630, 2489, 2690), and by Subject.

Bug Tracker: Search the number field with a list of numbers delimited by commas (e.g., 2630, 2489, 2690).

Quick searches

Quick Search feature: performs immediate data lookups based on keystroke entries. Matching values are presented in dropdowns adjacent to the field for selection. Typing any character in the field presents a list. Typing additional characters restricts the resulting list. The Quick Search feature is available on any edit field that has a Select button next it in edit view, for example, Assign To fields.

Detail View Screen

From a module's list view, clicking on any entry in the list displays the detail view for that item – for example the full details of a contact, or an account. This detail view shows more information than the list view for the specific item selected. It also shows all associated items of information, and lets you click on links to them. For example, the Accounts detail view screen lists all associated Account Open Activities, History (Notes, Emails, Tasks, Meetings, and Calls), Contacts, Opportunities, Leads, Cases, Member Organizations and Bugs. These lists of related information are called sub-panels which associates and represents information in much the same way that your brain thinks, and lets you navigate or explore the information that way.

Select popups

Sub-panel popups are accessed via sub-panel Select buttons and are multi-select popups. This feature promotes rapid association of multiple records, for example, multiple Contacts under an Account.

Data popups

Data popups automatically show detail information when you pass over an item as illustrated below:

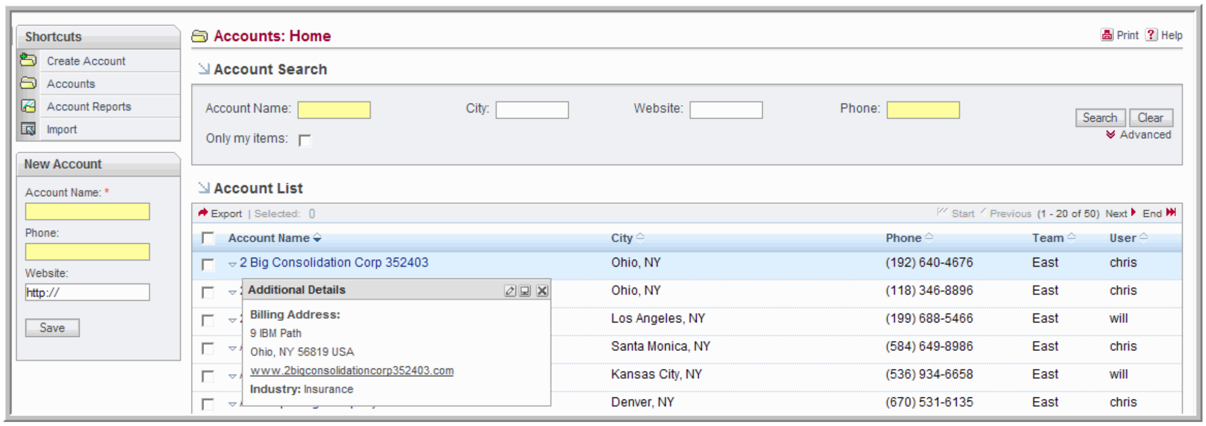


Figure 4: Sub-Panel Data Popup

You can view or edit the information by clicking the appropriate icon in the popup. Note that URLs in description fields are clickable for navigation purposes. A separate popup is generated.

Printing and Help

Each module provides Print and Help icons on the title bar at the top of the main screen body. Click the Print icon to print the current screen view. Clicking the Help button displays a link to the latest user documentation.

System Links

My Account

To access your own user profile screen, click the My Account link appears at the top right of your screen whenever you are logged in to the system. Note that an Admin link next to it is only displayed for users with Administrator capability. The figure below shows the user profile screen. When Administrators view information on a user, a Duplicate button displays, which allows an administrator to duplicate an account record, and then edit it briefly, as a quick way of creating a new user.

As discussed in the section on *Managing Your Password*, the Change Password button should be used periodically to change your user password.

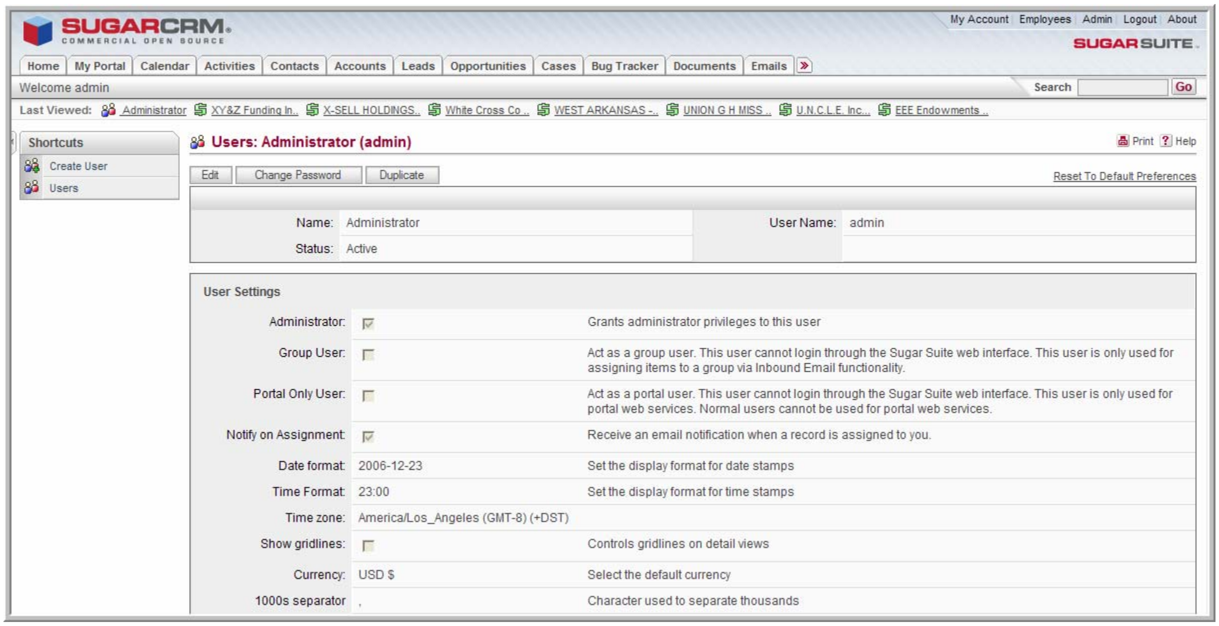


Figure 5: My Account Screen

To edit the user profile, and change user preferences, click on the Edit button. The edit view displays a screen which lets you define header information (such as First and Last Name, and User Name), User Settings, User Information (email address, title, department, and phone numbers), Address Information, Calendar Options, Email Options, and Edit Tabs. These groups of information are known collectively as the user profile.

User Settings

User settings include such items as a check box for Administrator capability (only users with Administrator capability are able to check this off), Assignment notifications (do you receive an email when you are assigned a responsibility), time format (AM/PM or 24-hour clock), a check box for gridlines on screen displays and a selector for the default preferred Currency.

Note: To display the Euro symbol in charts, you will need to install Macromedia Flash8.

User Information

User information includes more details about the user and contact information.

Email options contain information about your email server and must be specified correctly for you to send emails from the Emails module. This information is provided by an Administrator.

The Calendar options include settings to share your free vs. busy time between your calendars in Microsoft Outlook and Sugar Suite. This information is provided by an Administrator.

Users can also modify what module tabs they see when logged in. Administrators define the master list of available tabs in the administration screens, but users can then modify their own tab list by removing any unneeded tabs. When Administrators edit users account, they can disallow tabs for individual users so that they are not available.

E-mail Options

This option allows you to set your “From” name and address.

This option also allows you to specify the Email client. Options include the SugarCRM Mail Client. In addition, you can select an email format such as HTML or plain text. You can also choose to add your signature when you send or respond to emails.

In addition, you can view and change the mail transfer agent, change the server set up, and specify SMTP authentications. Check with your system administrator before editing these setting.

Calendar Options

This option allows you to determine whether your calendar is published or not.

Roles

Roles are created to determine the module a users has access to and what actions (via the Access Control Lists) the user can perform on that module. Roles are created and assigned to users by the System Administrator. An example use for a Role is to create different module sets for Roles named Sales, Marketing, and Support. While the users assigned to the Support Role need access to the Bug Tracker module, the users in the Sales Roles do not. The Access Control Lists (ACLs) allow very granular definitions of Roles based on modules and actions that can be performed on that module.

The ACL mechanism governs the actions (read, write, delete, update, import, export) that can be performed on data within modules. Roles are abstract definitions of privileges. See the Role Management section of System Administration for more detailed information about Roles and ACLs.

Employees

The Employees link displays a list of employees maintained by the administrator. The list displays the following values for each employee record: Name, Department, Reports To, Email, Phone and User Name.

The Employees module provides a list of all or selected Employees from a recent search. The Employees list may be sorted by clicking on any column title which has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Employees list is paginated if it contains more items 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. Clicking on any Employee in the list displays the detail information for that Employee.

The navigation shortcuts provided help you create a new employee or switch back to the Employees list view. When creating a new employee, you can add other contact information such as mailing address and employment status.

Every User in the system has an attached Employee record. However, every Employee does not necessarily have a User record. Users that are not Administrators can view, search, and select employees from the list. They cannot edit or add employees.

Logout

When you are finished working with the system, you should always log out of the system rather than just 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.

To log out:

- Click the Logout link in the User Management area (top right hand area of the screen).
- Close the browser window.

About

This link provides information about SugarCRM Inc. as well as credits and valuable source code references.

Using Sugar Suite

My Portal Module

The Portal Module list view is selected using the My Portal navigation tab:

Figure 6: My Portal Module

The My Portals screen provides shortcuts to web sites or applications. You can create shortcuts to web sites so that they appear as a set of shortcuts on the My Portal screen. Administrators can also add shortcuts to the list in the My Portal tab and they can create additional Portal tabs. New tabs are often used for email, forums, or other web-based applications, which allows Sugar Suite to provide a single interface for multiple application purposes. The initial web site displayed when you click the My Portals tab is the Portal home site, which is configured by the Administrator.

A set of shortcuts allows you to *Add Site*, *List Sites*, or to navigate to sites with shortcuts already created. The shortcuts include shortcuts you created to view Personal sites and shortcuts to Global sites created by the Administrator.

- To display the Portal screen list, click the *List Sites* shortcut.
- To delete a Portal site from the Portal List screen, click the checkbox next to the site and then click the *Delete* button below the list of Portal sites.
- To edit a Portal site, click on its name.

- To view its target web site, click the link to the URL.
- To create a new Portal site, click the Add Site shortcut. When creating a new Portal site, you can type the name and web site, click to select if you want it to be currently visible or not.

You might want to hide shortcuts without deleting them from the list. You can select whether the shortcut displays in the shortcut list, on the tab menu or both. Administrators can select whether the site is Personal or Global. Global means that the shortcut is added for all users.

Navigation Shortcuts

Navigation Shortcut – Add Site: Users can add their favorite website or work related website directly into the SugarCRM application. Name is what you want to call your website. The website text box is the area where you enter the URL of the website.

The placement drop down menu gives the user the following options:

- Tab and shortcut means the website link shows up on the shortcut and tab on the top.
- Tab menu shows up on the tab only.
- Shortcut menu shows up on the shortcut bar only. If the visible checkbox is checked, it indicates that the link shows up at the places according to placement option.
- Type dropdown menu determines who gets the link to the websites on the application.

Figure 7: My Portal Module (Add Site Edit View)

Calendar Module

The Calendar Module list view is selected using the Calendar navigation tab:

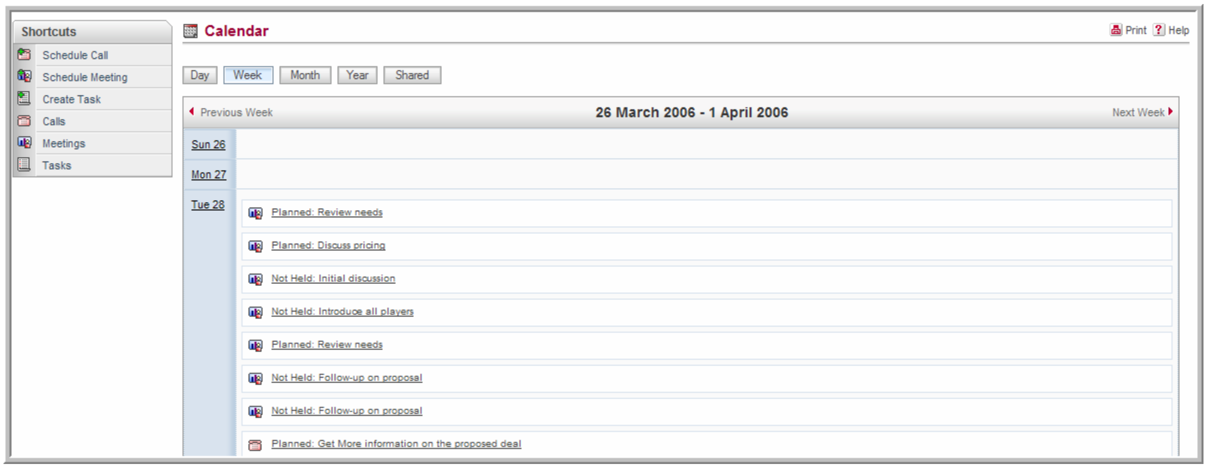


Figure 8: Calendar Module (Week Format)

You can display your calendar by Day, Week, Month or Year by clicking on the buttons 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 may click on any activity in your calendar to edit that activity.

Each different display format allows you to nudge backwards and forwards in time - by one day, week, month or year. In the Week, Month or Year display formats, clicking on a particular date within the display shifts the display to Day format for that date.

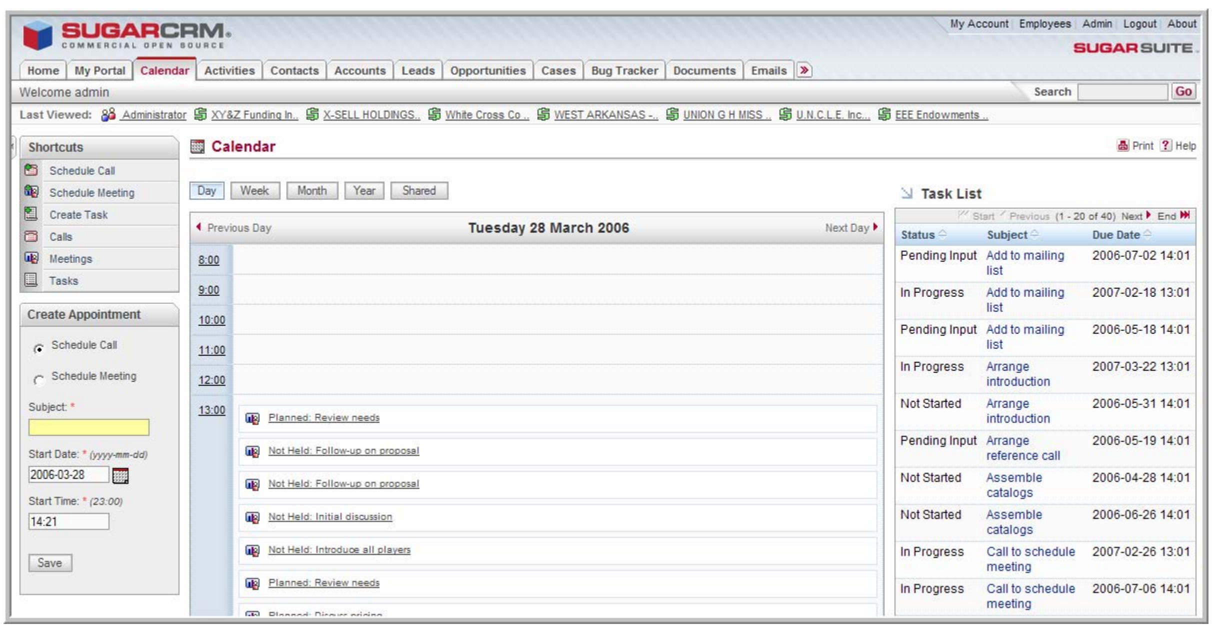


Figure 9: Calendar Module (Day Format)

The Day display format has the hours of the day listed vertically. Clicking on a specific time displays a quick method of scheduling a Call or Meeting.

The Day display format also includes a task list on the right side of the main screen body. Click the subject of a task in the list to view the details of that task.

The shortcuts allow you to view Calls, Meetings and Today. You can also click a shortcut to schedule a meeting or call. When you click the Schedule Meeting shortcut, you can view the meeting time slot in graphical view of the day. If other calls or meetings are scheduled, the busy time displays as blocked out. You can invite other users to the meeting by searching by their names and adding them.

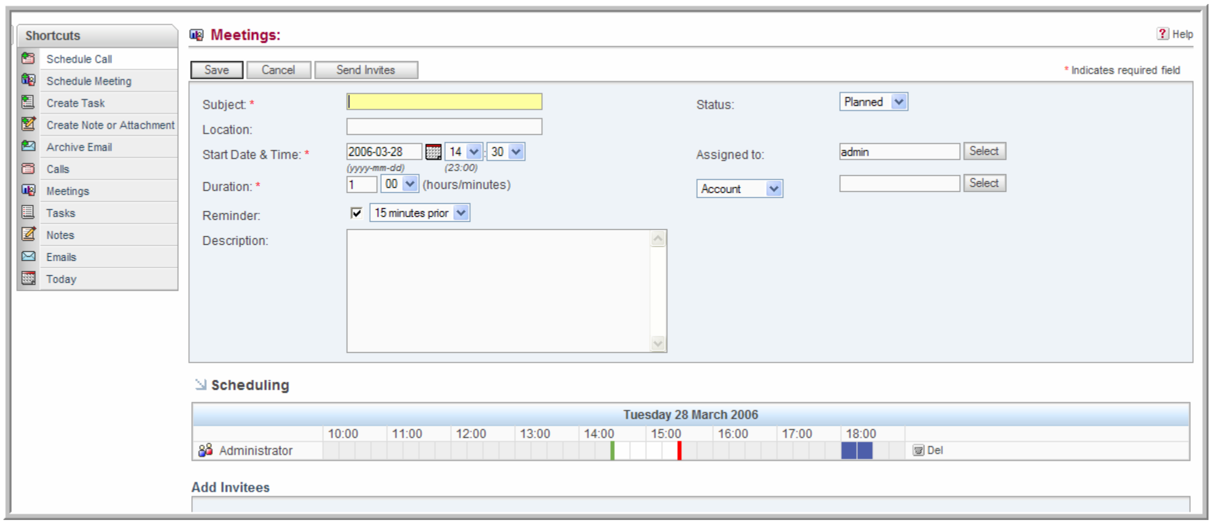


Figure 10: Calendar Module (Schedule Meeting)

Navigation Shortcuts

Navigation Shortcut – Schedule Call: The Schedule Call edit view takes you to the Calls' edit page. You can schedule a call by entering the information in this page. The required fields are: Subject, Start Date & Time, Duration and Status. After the required field information are entered you can save the call, cancel the call, or send invites to other team members by using the buttons at the top left of the panel.

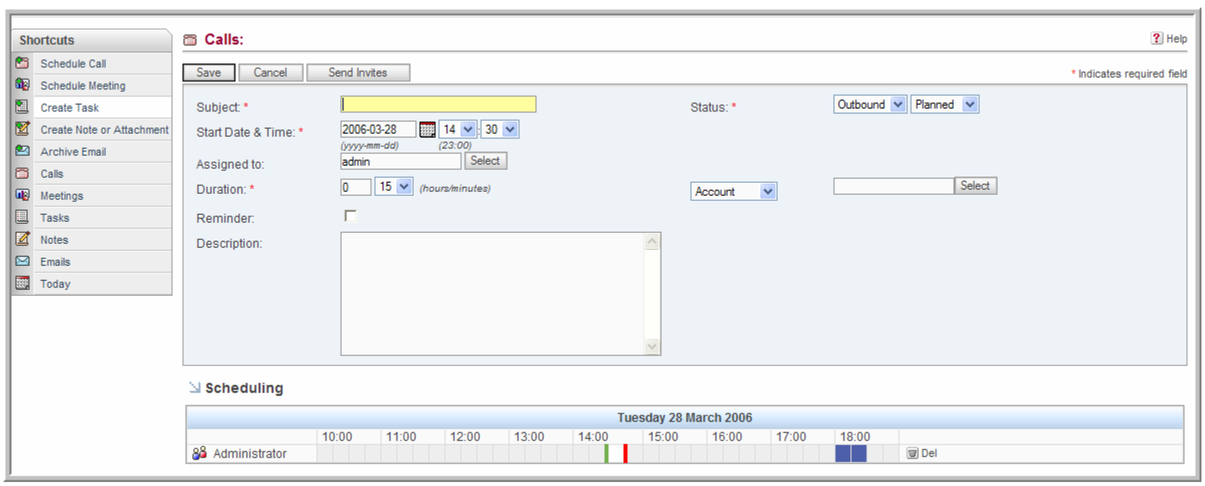


Figure 11: Calendar Module (Schedule Call Edit View)

Navigation Shortcut – Calls: The Calls shortcut takes you to the Call detail view page. You can search for a scheduled call in the search box on the upper left hand corner of the panel. The Call List displays calls that you have permission to see. By clicking on the subject link, it takes you to the call's detail page.

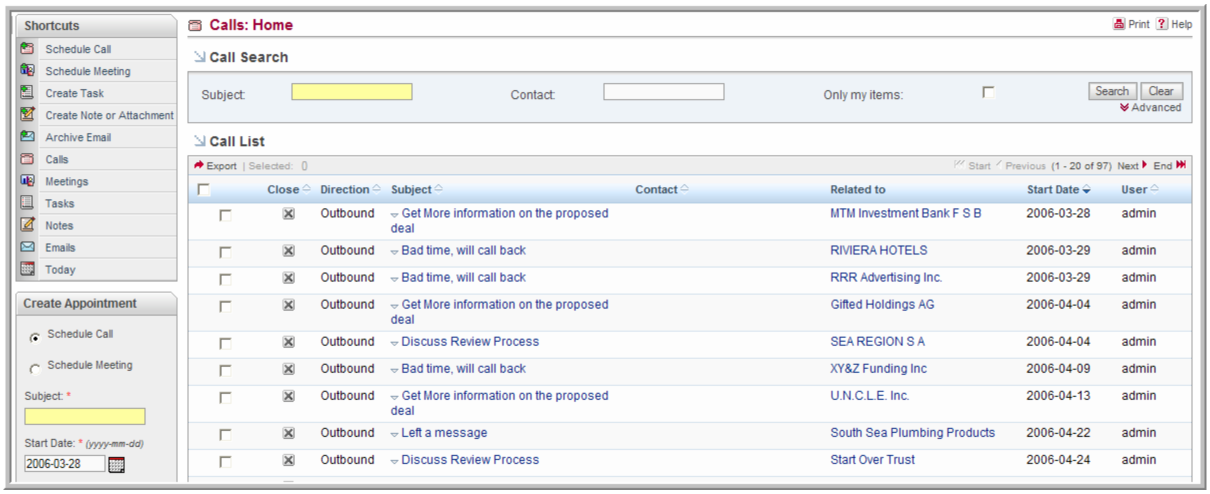


Figure 12: Calendar Module (Calls List View)

Navigation Shortcut - Meetings: The Meetings detail view is similar to Calls detail view page. You can search for a meeting with subject or contact name. This window also shows the list of meetings that you have permission to see.

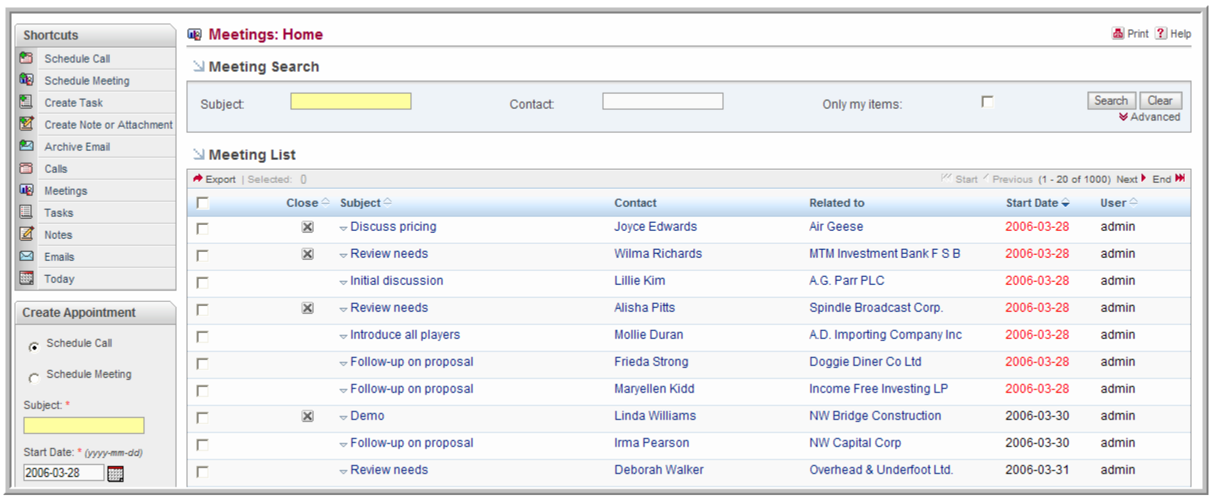


Figure 13: Calendar Module (Meetings List View)

Activities Module

The Activities Module list view is selected using the Activities navigation tab:

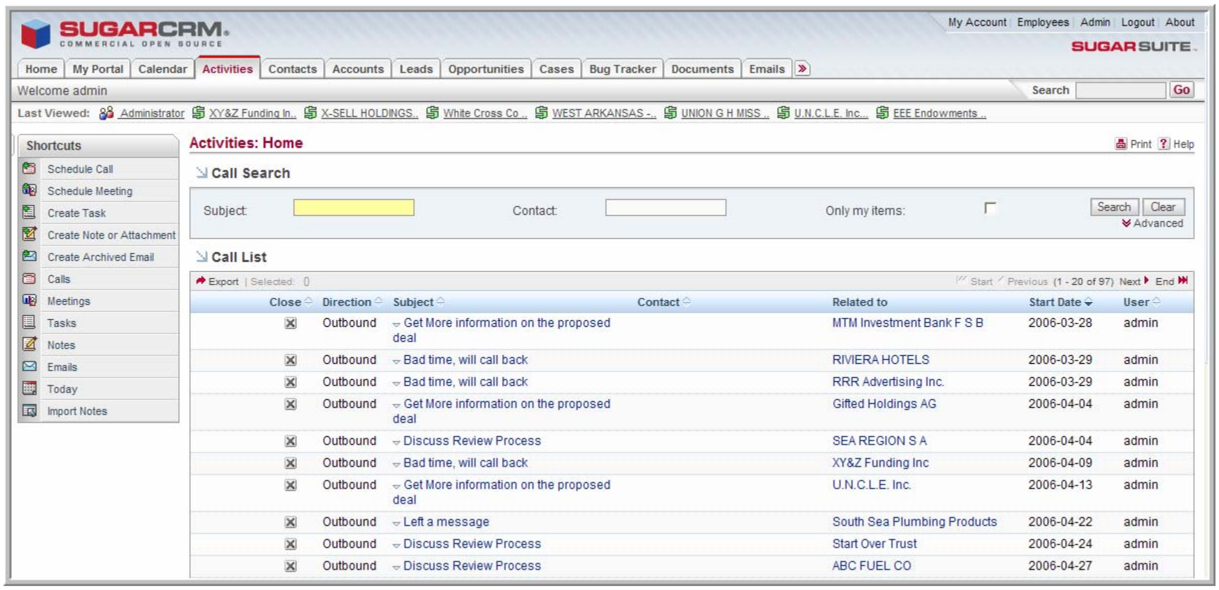


Figure 14: Activities Module (Call List View)

The Activities module allows you to create a new Call, Meeting, Task, Note or Email, by using shortcuts in the navigation shortcuts box. As well, you may select different list views for Calls, Meetings, Tasks, Notes or Emails, using the navigation shortcuts box. Each of the list views typically provides a list of all or selected items from a recent search. Each item in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all checked items.

Each list may be sorted by clicking on any column title which has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order. Each list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page.

Each of these list views provides powerful linking capabilities to related information. The Task list view, for example, lists Subject, Contact, Related To, Due Date, and the user assigned to the task. Clicking on a task's subject takes you to a detailed view of the specific task. Clicking on the Contact zooms to a detailed view of that contact, and so on. You can also click Import Notes to import notes from an outside file such as a .csv or .tsv file or from Salesforce.com.

Navigation Shortcuts

Navigation Shortcut – Calls: The Calls shortcut takes you to the call detail view page. You can search for a scheduled call in the search box on the upper left hand corner of the panel. The Call List display calls that you have permission to see. By clicking on the subject link, it takes you to the call's detail page.

Navigation Shortcut – Schedule Call: The Schedule Call edit view takes you to the Calls' edit page. You can schedule a call by entering the information in this page. The required fields are: Subject, Start Date & Time, Duration and Status. After the required field information are entered, you can save the call, cancel the call, or send invites to other team members by using the buttons at the top left of the panel.

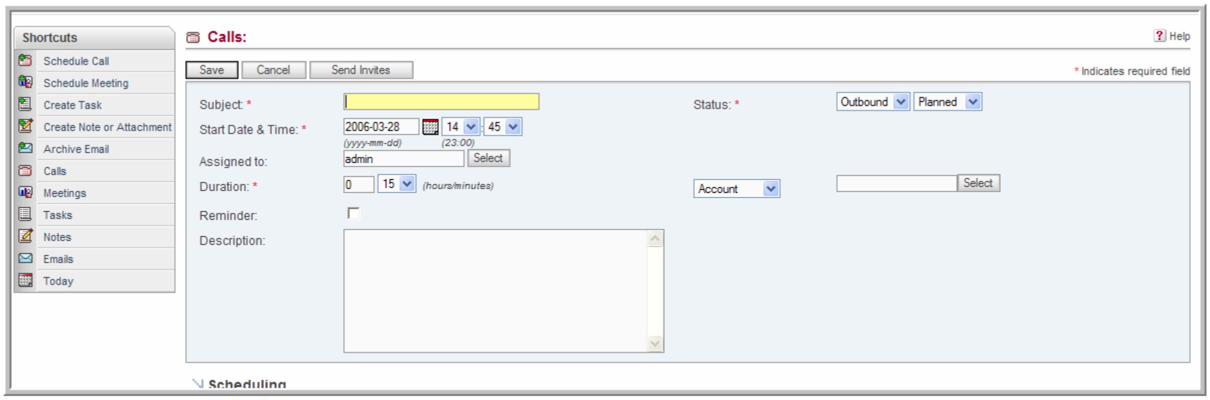


Figure 15: Activities Module (Schedule Call Edit View)

Navigation Shortcut - Meetings: The Meetings detail view is similar to Calls detail view page. You can search for a meeting with subject or contact name. This window also shows the list of meeting that you have permission to see.

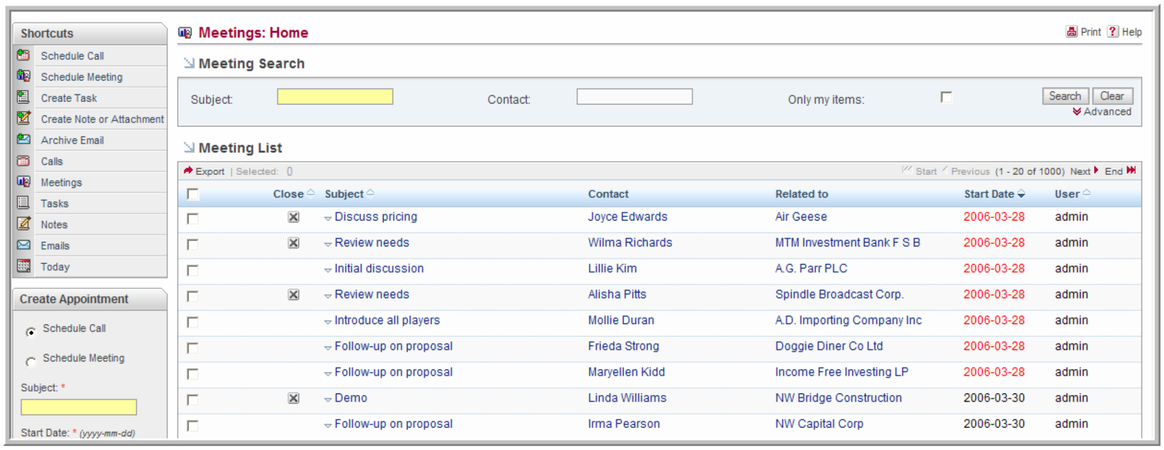


Figure 16: Activities Module (Meetings List View)

Navigation Shortcut – Tasks: The Tasks home view gives a list of tasks that are associated with your view permission. You can see the detail of each task by clicking on the subject item. The search bar on the top panel provides a quick search through the tasks list either by task name or contact name.

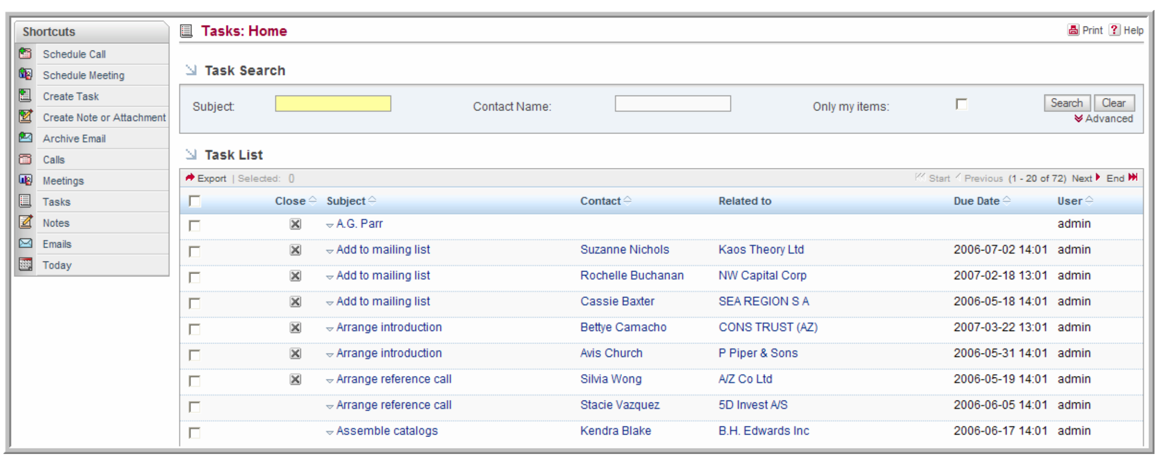


Figure 17: Activities Module (Tasks List View)

Navigation Shortcut - Create Task: The Create Task edit view provides a window where you can add new tasks to the current tasks list. Subject, Status, and Priority are required fields and must be filled in order to save the new task to the system.

If you want the task to show up on the calendar as a reminder, the Due Date & Time information should be entered.

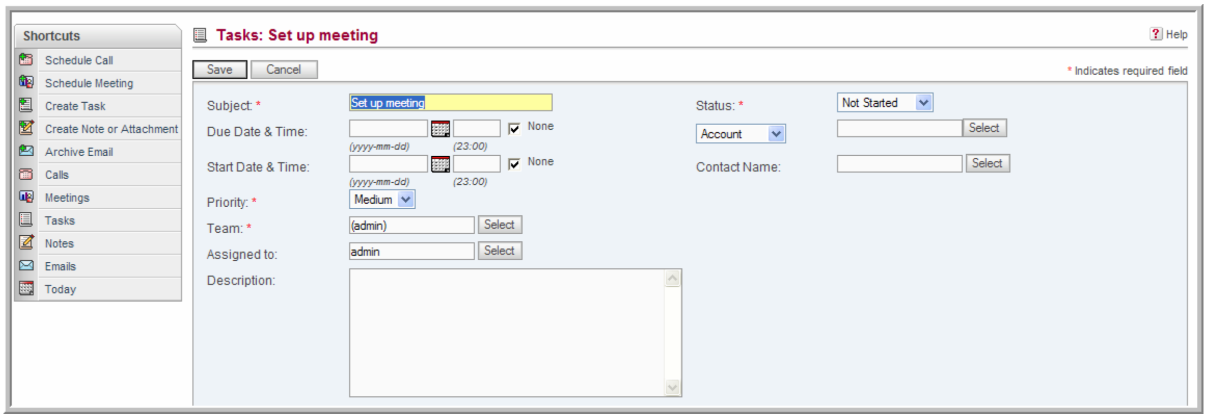


Figure 18: Activities Module (Create Task Edit View)

Navigation Shortcut – Notes: The Notes home view page displays the list of notes that is in the system. You can search for a particular note by using the note search sub-panel. The search criteria are based on either the subject or the contact that is related to the note. Another feature on this page is the mass update function panel on the bottom of the page. You can mass update the target notes by first selecting the notes through the checkbox. By using the update panel, you can mass update the notes' team ID, the contact, or the selection from the drop down menu.

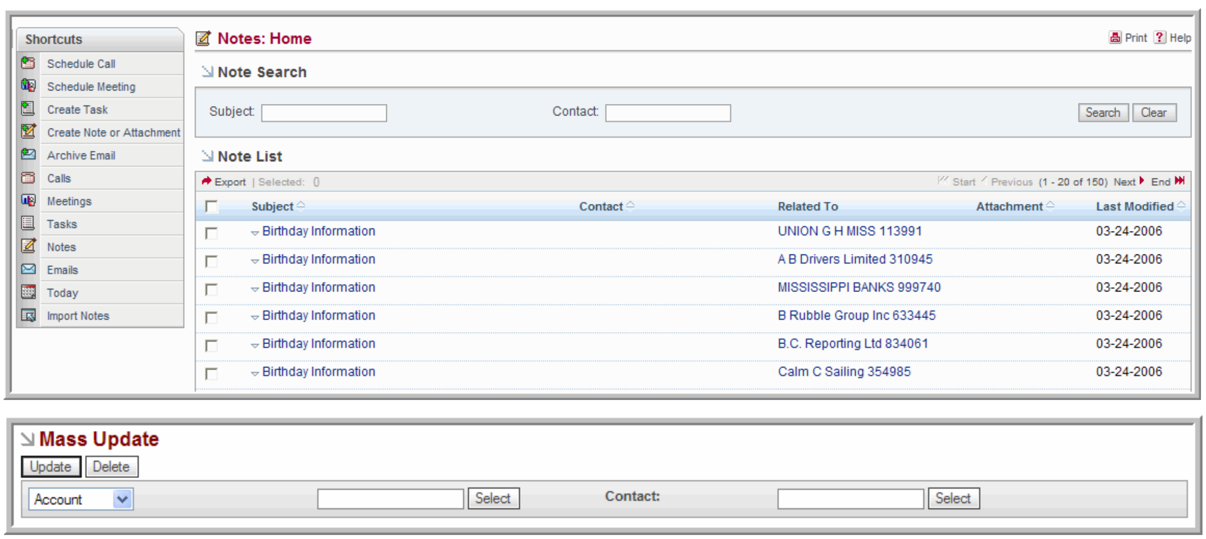


Figure 19: Activities Module (Notes List View)

Navigation Shortcut – Create note or attachment: You can add notes and attachment by using this panel. Subject field is the required field and must be completed before the application is able to save a note. You can add attachment to the note by using the browse button right next to the Attachment field. The drop down menu on the right side of the panel allows you a quicker way to populate the related information according to which option is picked.

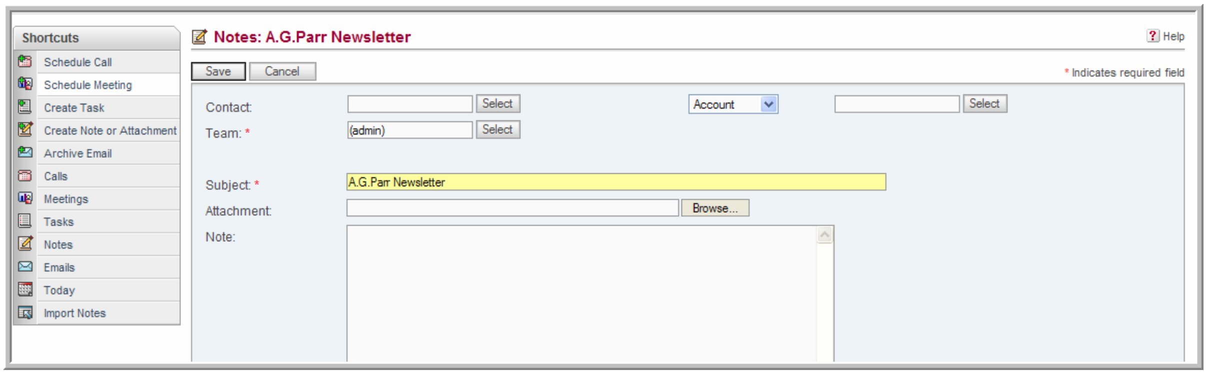


Figure 20: Activities Module (Create Note or Attachment Edit View)

Navigation Shortcut – Import Notes: A standard feature in the Activities module is importing notes from another source. Import Notes view provides a step-by-step page for user to import his/her own notes.

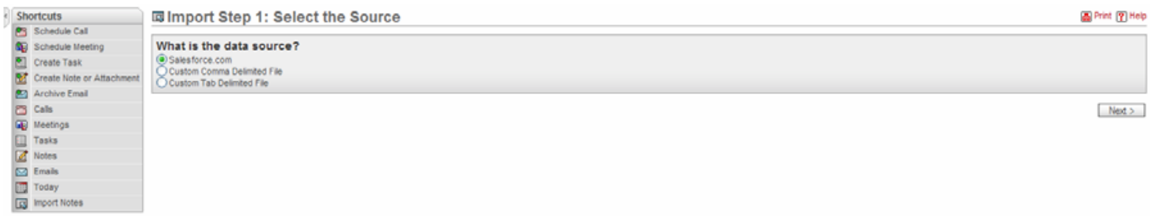


Figure 21: Activities Module (Import Notes Edit View)

Contacts Module

The following Contacts Module list view is selected using the Contacts navigation tab:

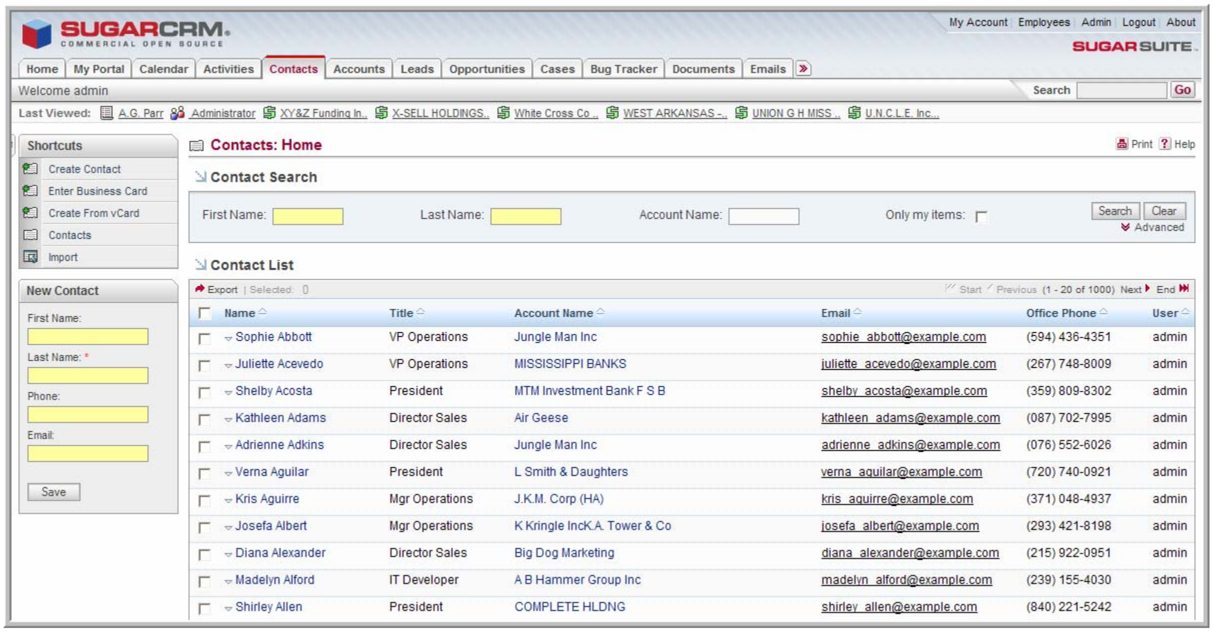


Figure 22: Contacts Module

Contacts are people related to sales accounts. The Contacts module provides a list of all or selected Contacts from a recent search. Each Contact in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all selected Contacts.

The Contact list may be sorted by clicking on any column title which has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Contact list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Contact in the list displays the detail information for that Contact. You can edit or view information about the Contact. Click the View Change Log link to view the old and new values for fields that track changes. The tracked fields include Assigned User, Do Not Call flag, Office Phone, and Email. In the History sub-panel, click the Summary button to view history information at a glance instead of selecting each item to view.

The Contact list view provides powerful linking capabilities to related information. Clicking on the Contact name displays a detailed view of that Contact. Clicking on the Account name displays a detailed view of that Account.

Navigation Shortcuts

The navigation shortcuts provided help you create a new contact by typing it in, by importing the information from a vCard, or by switching back to the Contact list view. An Import facility is also provided to import bulk contact data from Salesforce.com, Outlook, ACT!, or other applications.

Navigation Shortcut – Create Contact: This view allows you to enter the detail information on a new contact. The contact's last name needs to be entered in order for the system to save the new contact.

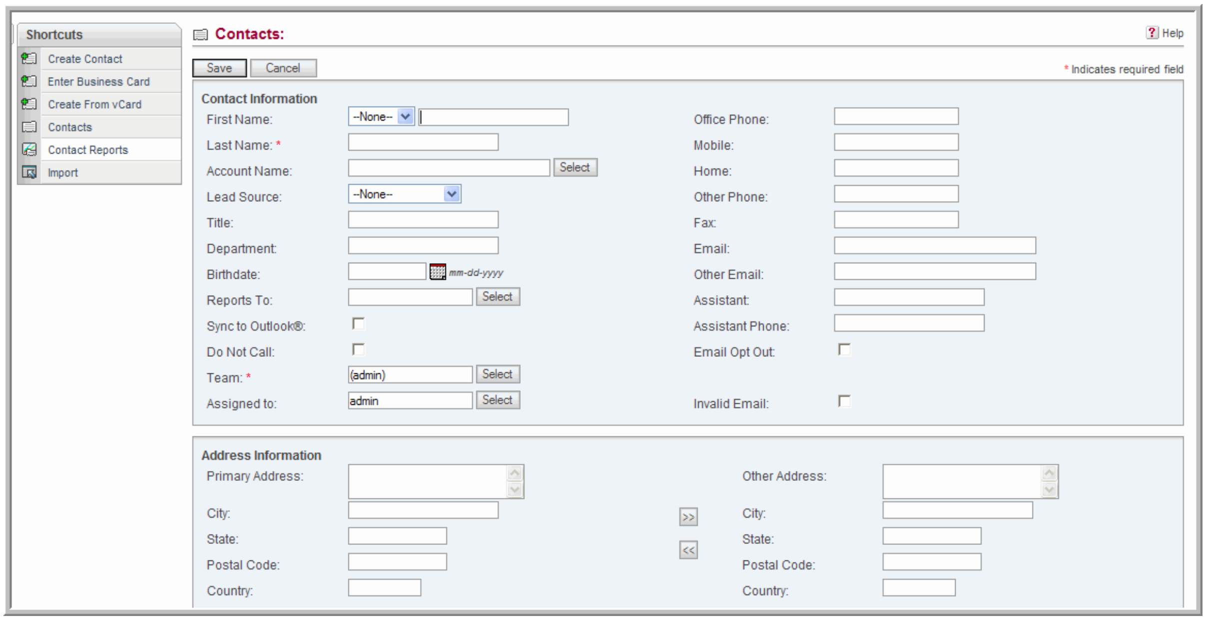


Figure 23: Contacts Module (Create Contact Edit View)

Navigation Shortcut – Enter Business Card: Another way to add a new contact is through entering a business card. The basic information is the same as creating the contact from the edit view. A feature on this view is that you can easily create a new contact, account, opportunity, and appointment by using the sub-panel at the bottom of the page.

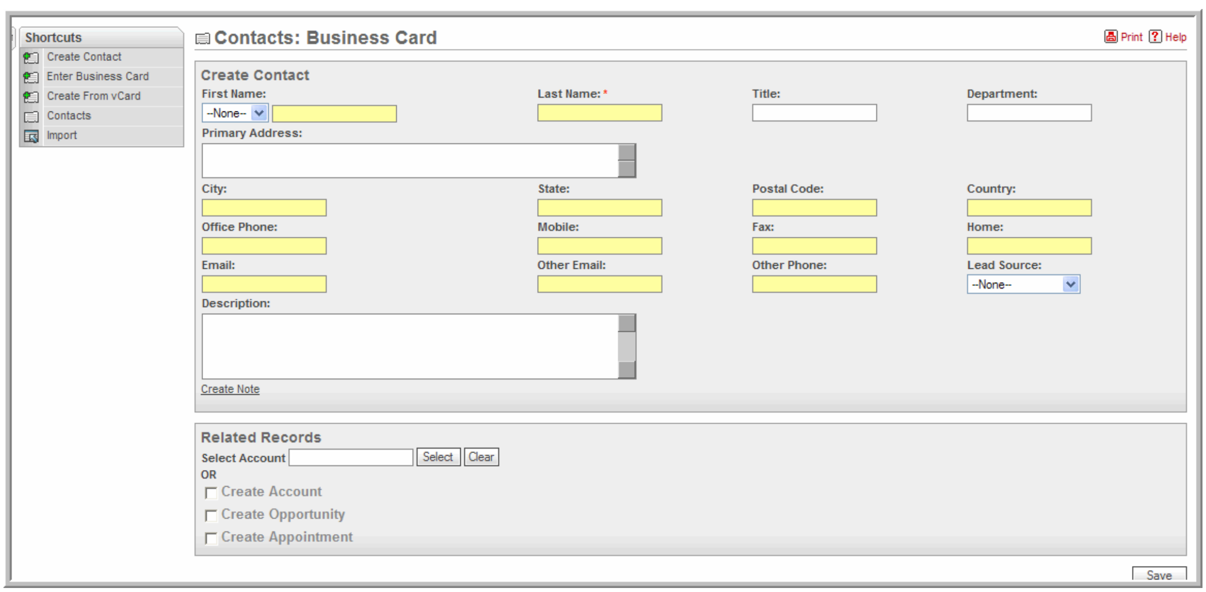


Figure 24: Contacts Module (Enter Business Card Edit View)

Navigation Shortcut – Create From vCard: Using this interface, you can create a new contact by importing a vCard file from their local system.

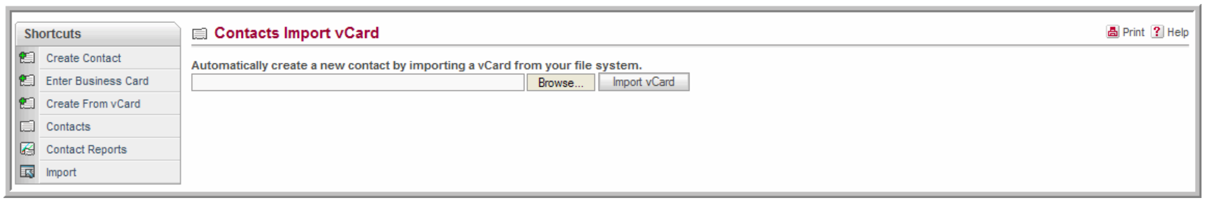


Figure 25: Contacts Module (Create from vCard Edit View)

Navigation Shortcut – Import Contacts: You can use the import tool to transfer a bulk account data. From the menu you have an option of importing from Salesforce.com, Microsoft Outlook, Act! 2005, Custom Comma Delimited File (CSV), or Custom Tab Delimited File. After selecting the data source, the application guides you through the import process by clicking on the next button.

Figure 26: Contacts Module (Import Edit View)

Accounts Module

The Accounts Module list view is selected using the Accounts navigation tab:

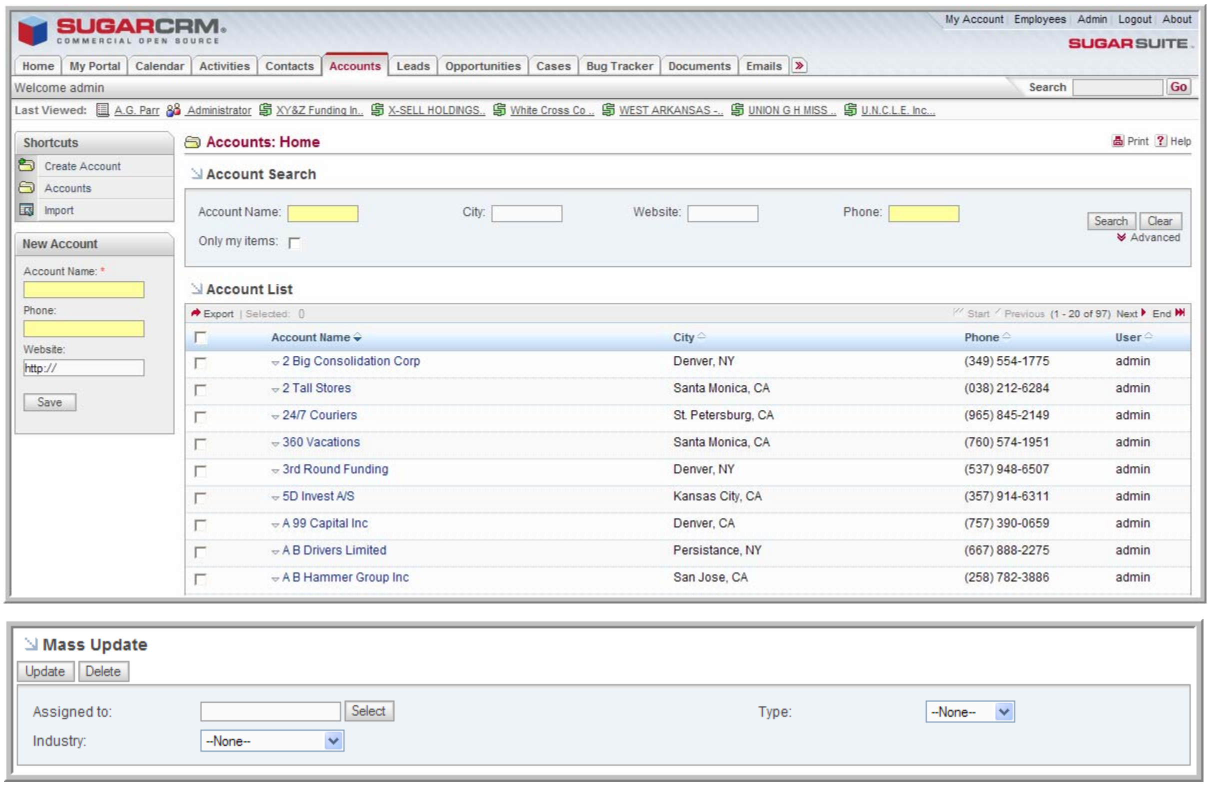


Figure 27: Accounts Module

The Accounts module provides a list of all or selected Accounts from a recent search. Each account in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all selected accounts.

Accounts List View

The Account list is paginated if it contains more items than may be listed on the display. Controls are provided to go to the start or end of the list, or step to the next or previous page.

Viewing Account Information

To view account information:

- Click on any account in the list displays the detail information for that account.
- Click the View Change Log link to view the old and new values for fields that track changes. The tracked fields include Assigned User, Member Organization assignment, Fax, and Email Address.
- In the History sub-panel, click the Summary button to view history information at a glance instead of selecting each item to view.
- Click on any column title which has the icon beside it to sort the account list.
- Click on a column title when it is already the highlighted sort column reverses the sort order.

The navigation shortcuts provided help you create a new account, or switch back to the Account list view.

Importing Bulk Account Information

An Import facility is provided, to import bulk account data from Salesforce.com, ACT!, or other applications. See the Import and Export section for more information.

Assigning Accounts to Users

You can assign accounts to other users and describe accounts by Type and Industry.

Accounts Detail View

The Accounts detail view has a “Copy to Contacts” action which allows you to propagate the Account Bill-to or Ship-to address for selected Contacts.

5. Click the link.
6. In the popup, identify the contacts associated with the account.
7. The address field is propagated.

Navigation Shortcuts

Navigation Shortcut – Create Account: The edit view allows you to create an account. The Account Name field is the required field in the system. You need to enter the Account Name information at the minimal in order for the system to save the record.

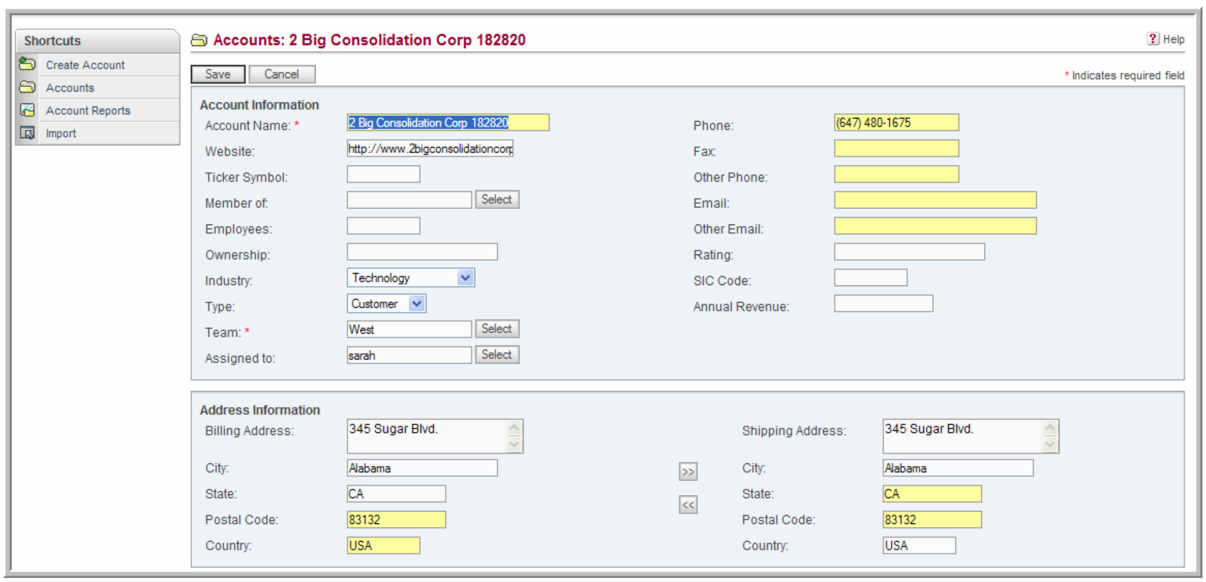


Figure 28: Accounts Module (Create Account Edit View)

Navigation Shortcut – Import Accounts: You can import a bulk of account information by using this option. The panel offers the option of importing from Salesforce.com, Act! 2005, Custom Comma Delimited File, or Custom Tab Delimited File. After selecting the data source, the panel guides you through the import process by clicking on the next button.

Figure 29: Accounts Module (Import Edit View)

Leads Module

The Leads Module list view is selected using the Leads navigation tab:

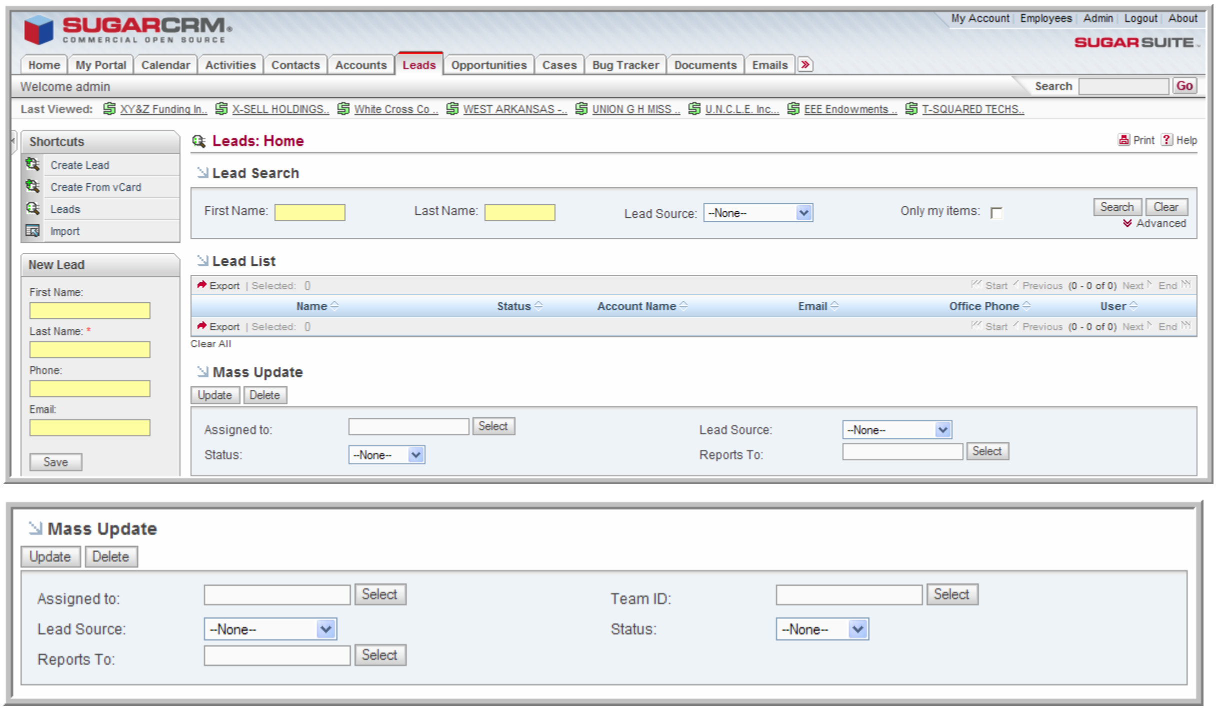


Figure 30: Leads Module

Leads are early contacts in the sales process. Once they have been properly evaluated and assessed, they may be converted into Contacts, with associated Opportunities and Accounts.

They may be managed and tracked through their life-cycle using the Leads module. Leads may be assigned a Lead Source of Cold Call, Existing Customer, Self Generated, Employee, Partner, Public Relations, Direct Mail, Conference, Trade Show, Web Site, Word of Mouth, or Other. They have a status of New, Assigned, In Process, Converted, Recycled, or Dead.

- Leads may be duplicated by clicking on the Duplicate button as a handy way of creating a number of similar leads.
- Leads may also be converted by clicking on the Convert Lead button to Contacts, and optionally their related Account, Opportunities, and even Appointment.

The Leads module provides a list of all or selected Leads from a recent search.

- The Leads list may be sorted by clicking on any column title which has the icon beside it.
- Click on a column title when it is already the highlighted sort column to reverse the sort order.
- Each lead in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all selected leads.
- The Leads list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page.
- Click on any lead in the list to display the detail information for that lead.

- Click the View Change Log link to view the old and new values for fields that track changes. The tracked fields include Assigned User, Source, Status, Do Not Call flag, Office Phone, Email, and Email Opt Out. In the History sub-panel.
- Click the Summary button to view history information at a glance instead of selecting each item to view.

Navigation Shortcuts

The navigation shortcuts provided help you create a new lead (from a vCard, or by simply typing it in), or you can switch back to the Leads list view. An Import facility is provided also to bring in bulk lead data from applications such as Salesforce.com.

Navigation Shortcut – Create Lead: Create Lead edit view provides the form for creating a new lead. The Last Name text field is the required field on this page. You need to enter the lead's last name in order to save the new record. The default assigned team and assigned to is admin. Make sure those two fields are correctly assigned in order to have the right privilege for the assigned member.

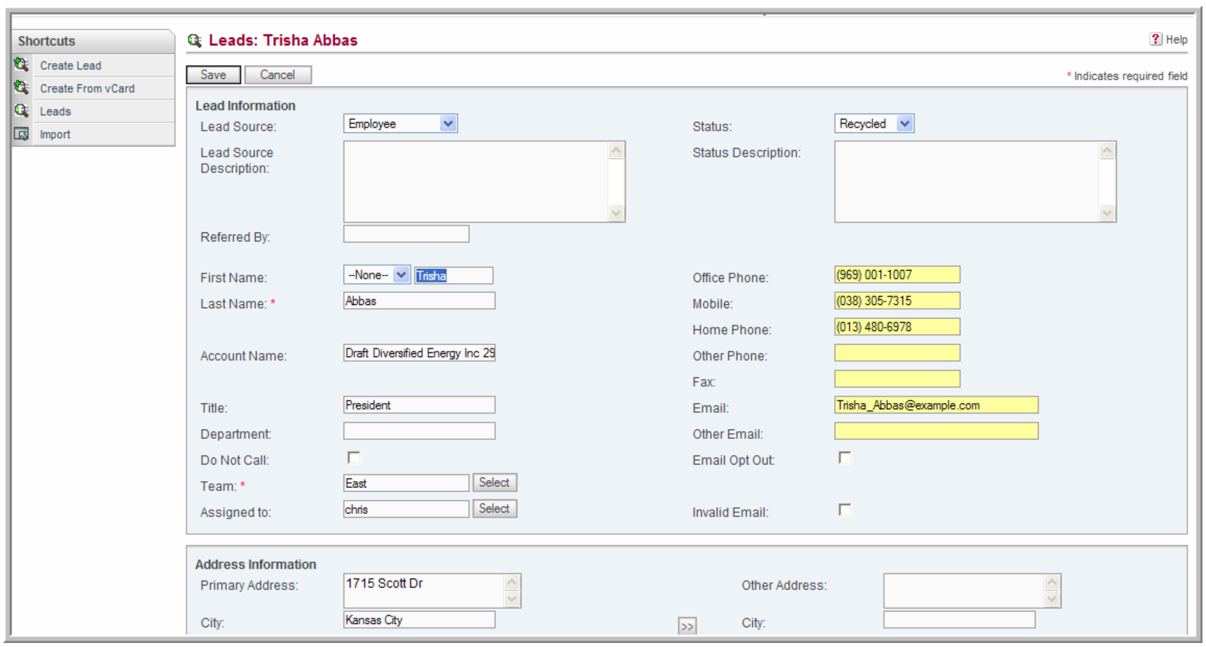


Figure 31: Leads Module (Create Lead Edit View)

Navigation Shortcut – Create From vCard: Using Create from vCard shortcut allows you to automatically create a new lead by importing a vCard from the file system. Click on the browse button to locate the vCard file that you wanted to import from the local system. After the file has been selected, click Import vCard to create a new lead from vCard file.

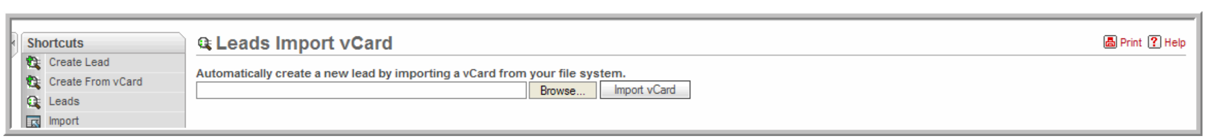


Figure 32: Leads Module (Create From vCard Edit View)

Navigation Shortcut – Import Leads: Another way to create leads is by importing the lead information from another lead file. This feature here allows the user to import and create new leads by importing from another system such as Salesforce.com, Custom Comma Delimited File, and Custom Tab Delimited File.

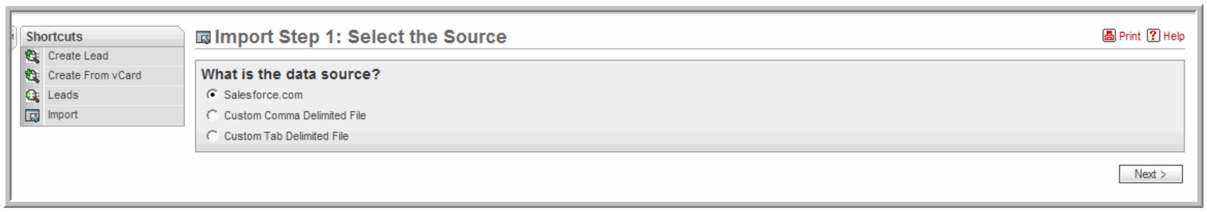


Figure 33: Leads Module (Import Edit View)

Opportunities Module

The Opportunities Module list view is selected using the Opportunities navigation tab:

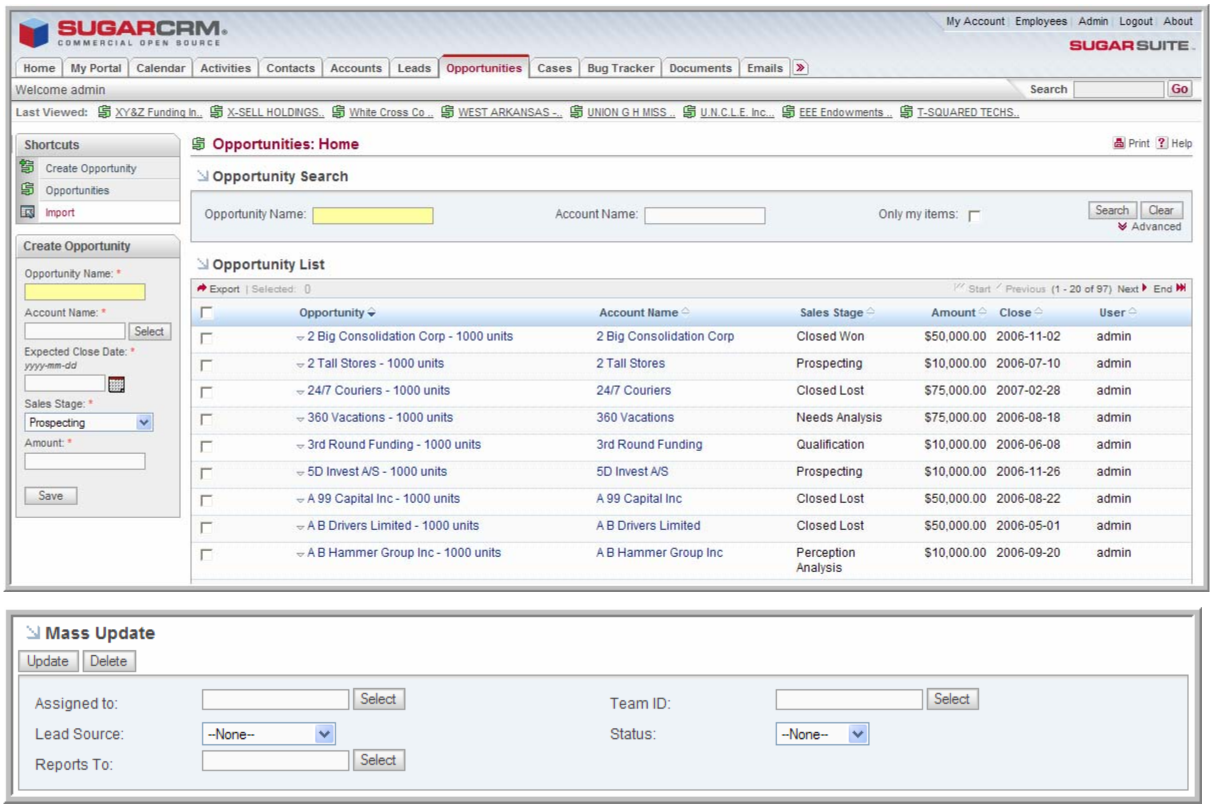


Figure 34: Opportunities Module

Opportunities represent potential sales opportunities that you want to manage into becoming sales. You can change the values for the amount, the current sales stage and probability of closing. You can assign opportunities to other users.

The Opportunities module provides a list of all or selected Opportunities from a recent search. The Opportunities list may be sorted by:

- Click on any column title which has the icon beside it.
- Click on a column title when it is already the highlighted sort column to reverse the sort order. Each opportunity in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all selected opportunities.

The Opportunities list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page.

- Click on any opportunity in the list to display the detail information for that opportunity.
- Click on the account name for an opportunity link to the detailed information for that account.
- Click the View Change Log link to view the old and new values for fields that track changes. The tracked fields include Assigned User, Type, Amount, Date Closed, Sales Stage, and Probability.
- In the History sub-panel, click the Summary button to view history information at a glance instead of selecting each item to view. The navigation shortcuts can help create a new opportunity or

switch back to the Opportunities list view. As well, an Import facility is provided, to bring in bulk opportunity data from Salesforce.com, or other applications.

- Opportunities: Sales Stage dropdown values determine the default value for Probability.

Navigation Shortcuts

Navigation Shortcut – Create Opportunity: This page provides the necessary fields for you to enter the information for creating a new opportunity. The required fields in this screen are:

- Opportunity Name - The given name for this particular opportunity.
- Account Name - The account that is associated with this opportunity. The account must be present in order to select and link the account to the opportunity.
- Amount - The amount of the opportunity.
- Expected Close Date – The expected or estimated close date for this particular opportunity.
- Sales Stage - The current stage of this opportunity.

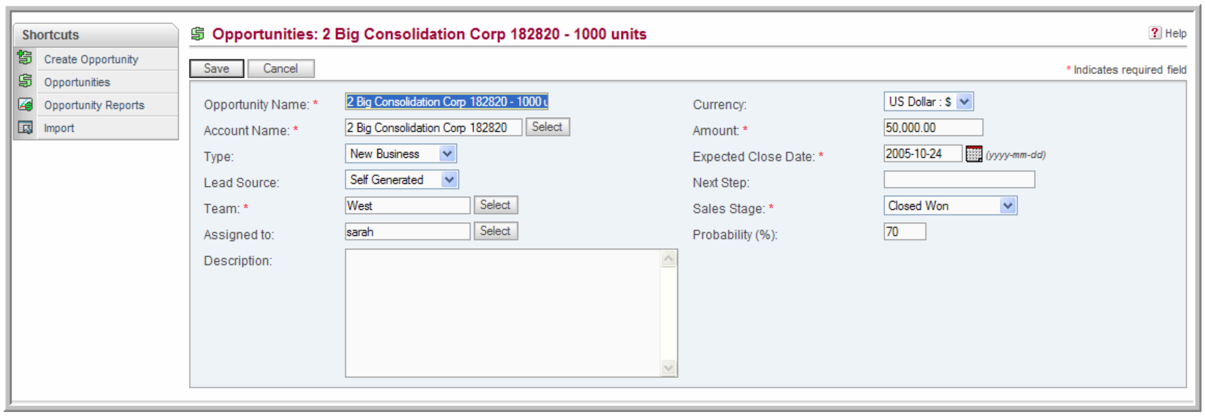


Figure 35: Opportunities Module (Create Opportunity Edit View)

Navigation Shortcut – Import Opportunities: Import edit view allows you to create a list of opportunities from another data source such as Salesforce.com, Custom Comma Delimited File, or Custom Tab Delimited File. After selecting the data source, you can click on the next button in order to move on to the next step of the importing process.

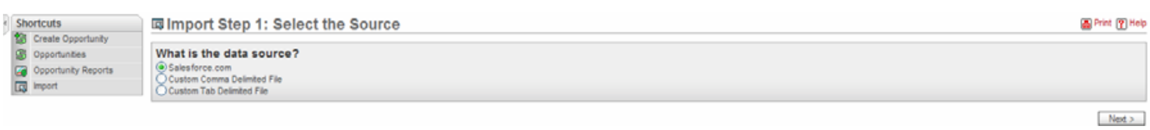


Figure 36: Opportunities Module (Import Opportunity Edit View)

Cases Module

The Cases Module list view is selected using the Cases navigation tab:

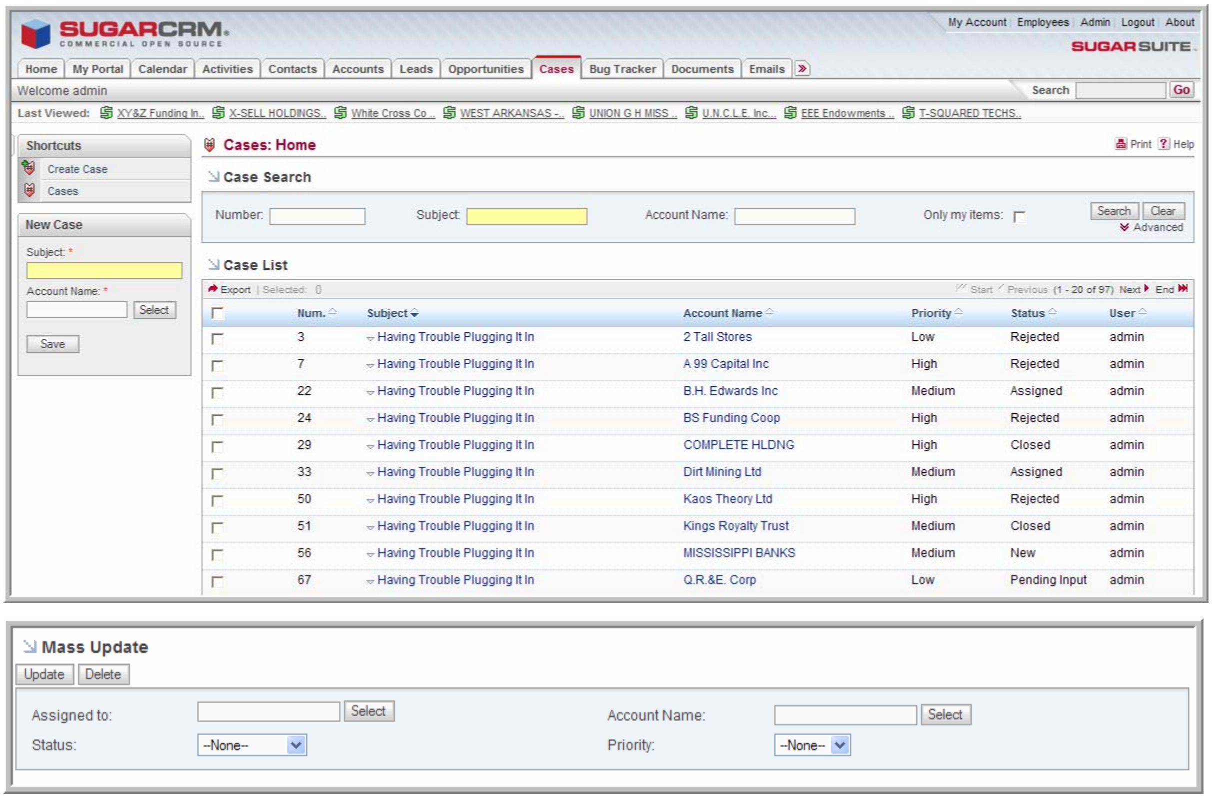


Figure 37: Cases Module

Cases are inquiries or problems associated with an account. They may be managed and tracked through their life-cycle using the Cases module. Cases may be assigned High, Medium or Low priority. They have a status of New, Pending Input, Assigned, Rejected, or Closed.

The Cases module provides a list of all or selected Cases from a recent search. Each Case in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all selected Cases.

- The Cases list may be sorted by clicking on any column title which has the icon beside it.
- Click on a column title when it is already the highlighted sort column to reverse the sort order.

  The Cases list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page.
- Click on the subject for any case in the list to display the detail information for that case.
- Click on the account name for case links to the detailed information for that account.
- Click the View Change Log link to view the old and new values for fields that track changes. The tracked fields include Assigned User, Account, Status, and Priority. In the History sub-panel.
- Click the Summary button to view history information at a glance instead of selecting each item to view.

Navigation Shortcuts

The navigation shortcuts provided help you create a new case, or switch back to the Case list view.

Navigation Shortcut – Create Case: The Create Case screen provides the necessary space for you to enter all the information regarding the case. Subject field and Account name are the required fields. Both items need to be filled out in order to save the new case in the system.

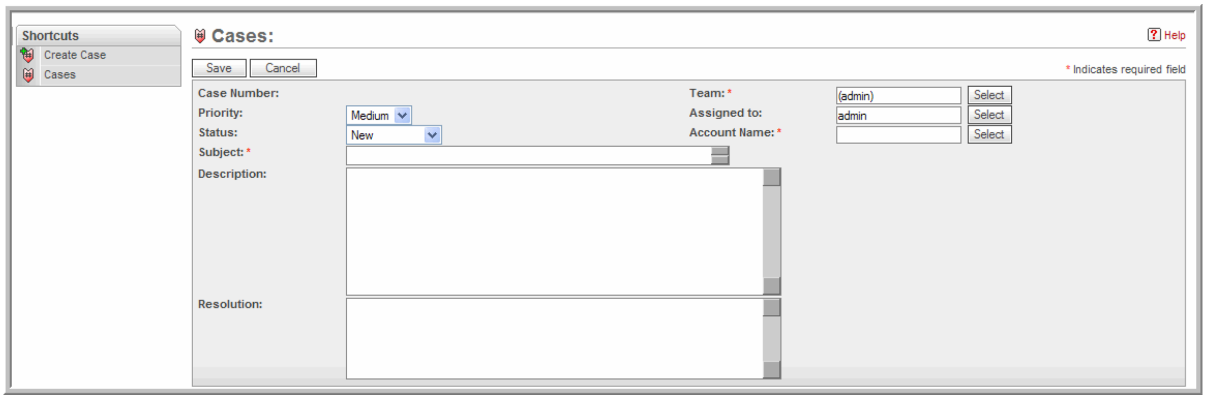


Figure 38: Cases Module (Create Case Edit View)

Bug Tracker Module

The Bug Tracker Module list view is selected using the Bug Tracker navigation tab:

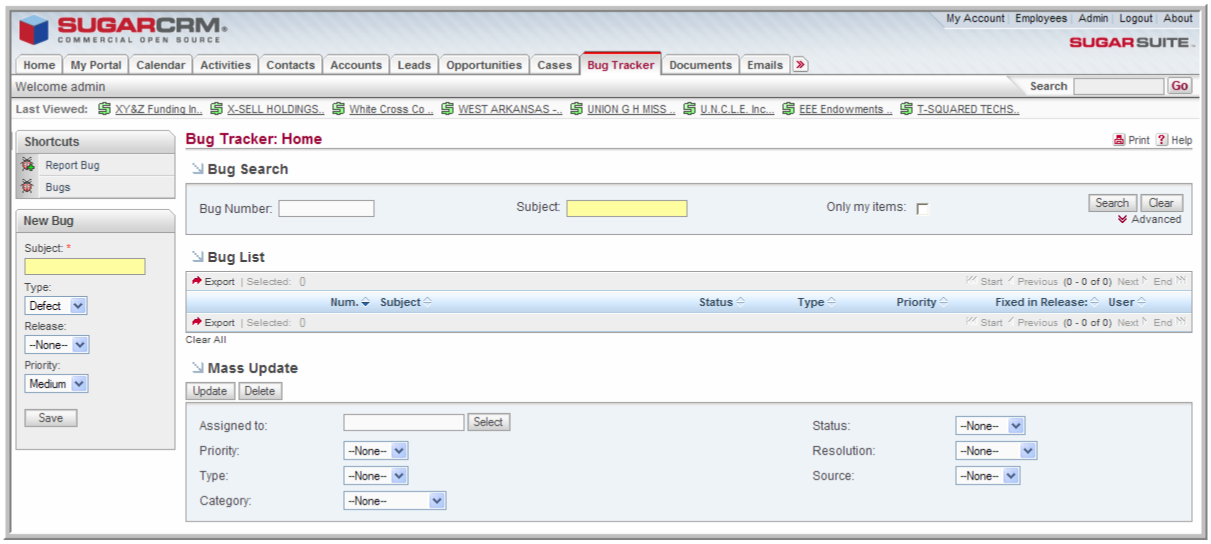


Figure 39: Bug Tracker Module

Bugs are defects or features associated with a particular revision of a product. They may be managed and tracked through their life-cycle using the Bug Tracker module. Bugs may be assigned a priority of Urgent, High, Medium and Low. They have a status of New, Assigned, Closed, Pending Input, or Rejected. Each Bug also specifies a release. The drop-down list of choices for release is populated by the System Administrator using the Issue Tracker Administration option within the administration screens. Each Bug may also be assigned a resolution status of *Accepted, Duplicate, Fixed*, *Out of Date*, *Invalid*, or *Later*.

The Bug Tracker module provides a list of all or selected Bugs from a recent search. Each Bug in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all selected Bugs.

- The Bug list may be sorted by clicking on any column title which has the icon beside it.
- Click on a column title when it is already the highlighted sort column to reverse the sort order.

  The Bug list is paginated if it contains more items than may be listed on the display and controls are provided to go to the start or end of the list, or step to the next or previous page.
- Click on the subject for any Bug in the list to display the detail information for that Bug.
- Click the View Change Log link to view the old and new values for fields that track changes. The tracked fields include Assigned User, Status, Priority, and Resolution.
- In the History sub-panel, click the Summary button to view history information at a glance instead of selecting each item to view.

Navigation Shortcuts

The navigation shortcuts provided help you create a new Bug report or you can switch back to the Bug list view. There is also a New Bug data entry box for quickly entering a new Bug as it is reported.

Navigation Shortcut – Report Bug: Report Bug edit view allows you to submit new bugs to the system. The drop down menus provide the standardize information field that is related to the bug.

Subject field box is the required field and it needs to be filled with subject name in order for the system to save the new record.

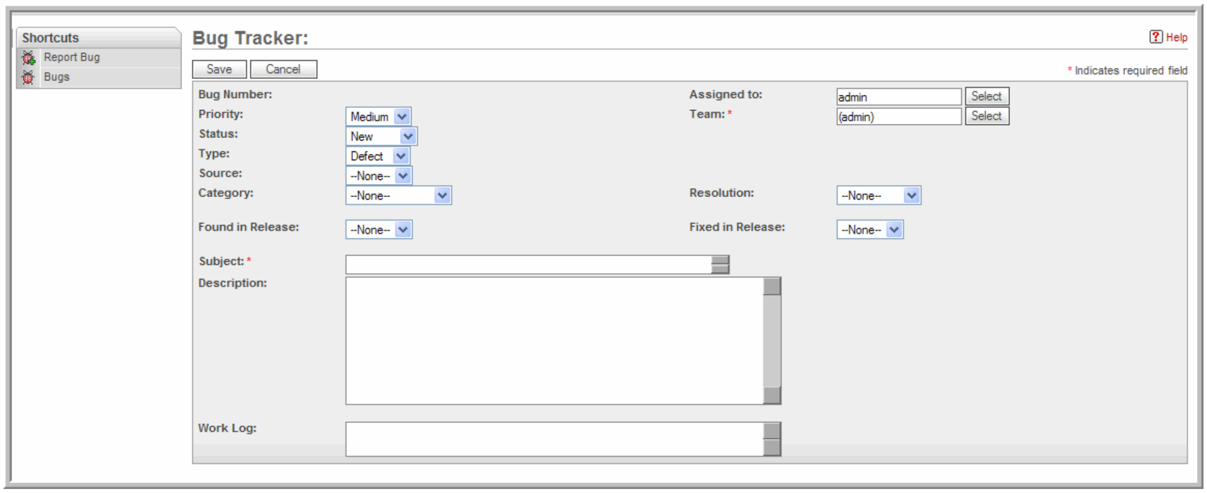


Figure 40: Bug Tracker Module (Report Bug Edit View)

Documents Module

The Documents Module list view is selected using the Documents tab:

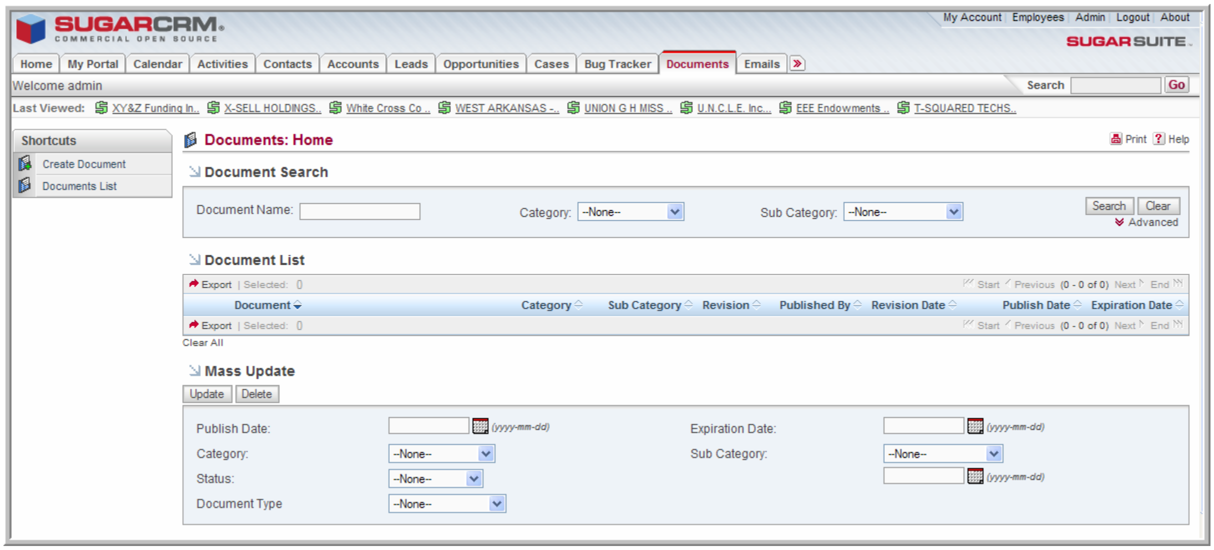


Figure 41: Documents Module

The Documents module allows you to attach files to create a document list for sharing with other users. The Documents module provides a list of all or selected documents from a recent search. Each document in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all selected documents. For example, you might want to change the expiration date for several documents at one time.

Creating a Document

To create a document:

1. Click the Create Document shortcut.
2. Browse to the file you want to attach. You can type a different name for the document or use the file name provided. Select a Category, Sub-category, Status, Publish Date, and Expiration Date.
3. Define a revision number or version and a description for the document, if desired.

After a document is published, other users can download it and view it.

Viewing a Document

To view a document in the Documents List:

1. Click the document name and then select the file name next to Download File.
2. Save or open the downloaded file.
3. When documents change, you can attach a new revision of the file by the editing the document.

To edit the document:

4. Select the document from the Document List and click
5. Create in the Document Revisions section.
6. Select the changed file using the same name or a new file to replace the original file.

7. Specify a revision number and click Save. You cannot change the Document name displayed in the Document List when you are adding a revision. The revised file is displayed in the Document List with the new revision number.

Identifying MS Word Mail Merge Templates

This module allows for the identification of Microsoft Word mail merge templates. It is these templates that are used when a mail merge is performed directly from within Sugar Suite. The templates themselves can be created from the Sugar Add-in for Microsoft Word and uploaded to Sugar Documents.

- In Documents, a checkbox identifies a Document as a mail merge template.
- In the navigation bar (Mail Merge), a link allows direct access to the Sugar Suite mail merge wizard without having to go through a list view.

Navigation Shortcuts

- **Navigation Shortcut – Create Document:** This edit screen provides the text box and the drop down menu for adding detailed information to the document that is uploaded into the system.

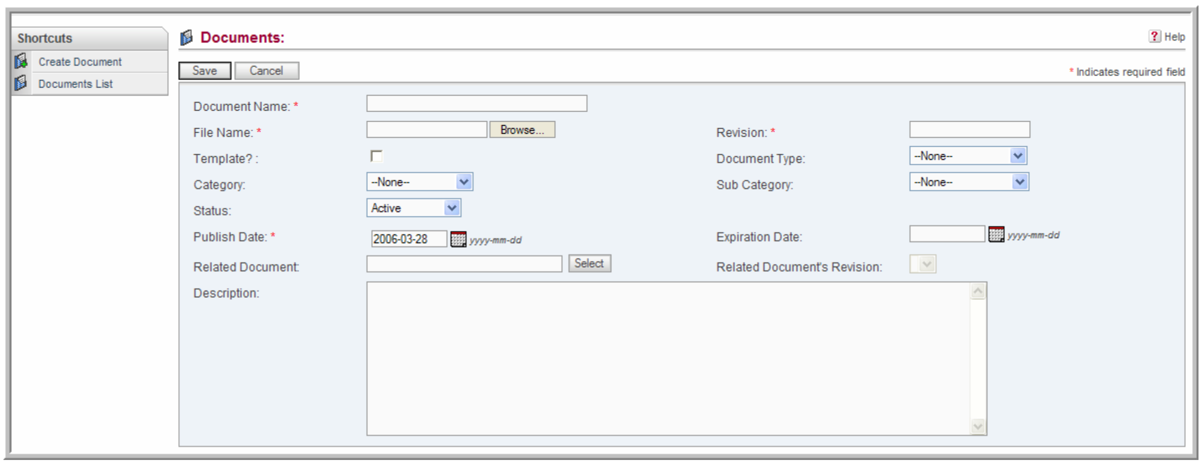


Figure 42: Documents Module (Create Document Edit View)

The required fields are:

- Document Name: Enter a brief descriptive name of the document.
- File Name : Enter the file name or click Browse to locate the document from the local storage.
- Template: Select the check box if you are creating a template. When you relate a template with a mail merge document, the Documents sub-panel will indicate that it is a template.
- Category: Select the document category from the drop-down list. The options are Marketing, Knowledge Base, and Sales.
- Publish Date: Click the calendar icon and select the date when the document is uploaded.
- Related Document: Click Select to specify any documents that are related to this one.
- Description: Enter a brief description of the document.
- Revision: Enter the document revision number.
- Document Type: Select the document type from the drop-down list.

- Sub Category: Select the sub-category for the document type from the drop-down list.
- Expiration Date: Click the calendar icon and select the date when the document is no longer valid.
- Related Document’s Revision: Select the revision number of the related document from the drop-down list.

Emails Module

The Emails Module list view is selected using the Emails tab and provides a list of all or selected Emails from a recent search.

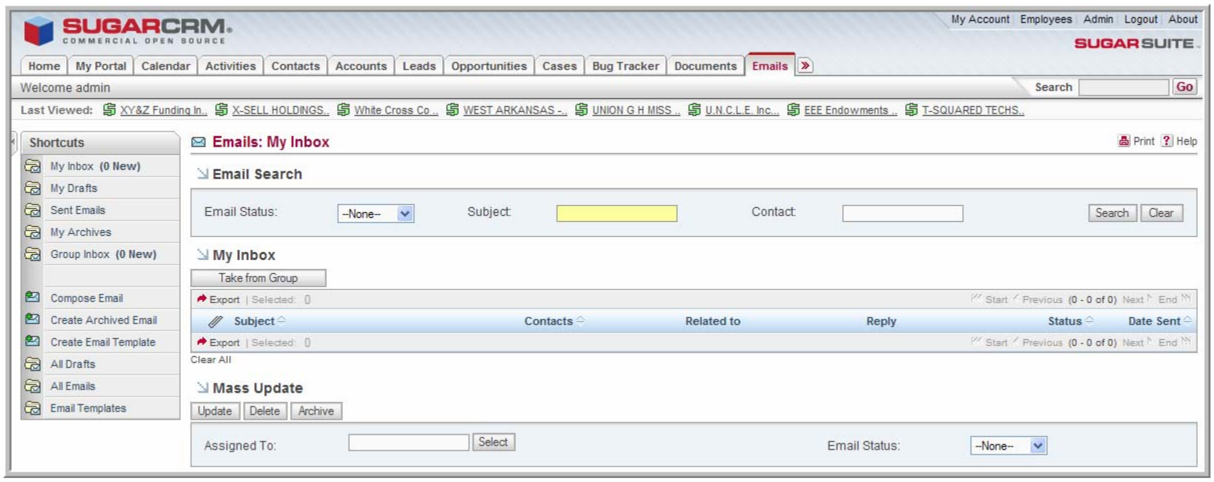


Figure 43: Emails Module

Items contained in email boxes can be parsed and associations made to applicable existing Sugar records, such as an email for a given Case ID. Emails that do not reference existing Sugar records can be placed in a Group Inbox and subsequently assigned and worked.

- Emails retrieved from monitored mailboxes are put in the Group Inbox.
- Items in the Group Inbox can be assigned and/or distributed to users and once distributed, the items appear in the user's My Inbox.
- Email items residing in the Group Inbox can be assigned to specific individuals or to individuals within teams. With either option, you can distribute the assignment based on two available assignment options: round-robin or least-busy. You can choose to assign single email items or in bulk by using the "Only Checked" and "All Search Results" options.
- From My Inbox, a user can create a lead, case, or contact.

Listing and Sorting Emails

Each Email in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more values for all selected Emails.

- Sort the Email list by clicking on any column title which has the icon beside it.
- Click on a column title when it is already the highlighted sort column to reverse the sort order. The Emails list is paginated if it contains more items 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 subject for any Email in the list to display the detail information for that Email.
- Use the navigation shortcuts to create a new Email.
- Use the Email list view to create or view Email Templates or view Archived Emails.

Creating Emails

You can create Emails and send them if the Email Options in My Account are set correctly. An administrator must provide this information for your particular environment. When you send emails, you can attach a file to the email. This file becomes saved as a Note related to your email.

- Start emails and then click the Save As Draft button to send it later.
- Click the Drafts shortcut to display your draft emails.
- When you create an Email Template, you can insert variables for information such as First Name, Last Name, address or email.
- Apply a saved template when creating an email for individuals or in an emailing Campaign. The variables can be filled by data from the Target records when the email is sent. Refer to the Campaigns Module for more information on creating an emailing Campaign for large groups of leads or contacts.
- Format the body text in emails and email templates using the text formatting 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.
- Click Edit Alt Text to specify the text that displays when an email client cannot render HTML code.

My Inbox

The My Inbox list view contains emails that assigned to you. This Inbox can also be accessed from your Home screen. This illustration shows a user's My Inbox list:

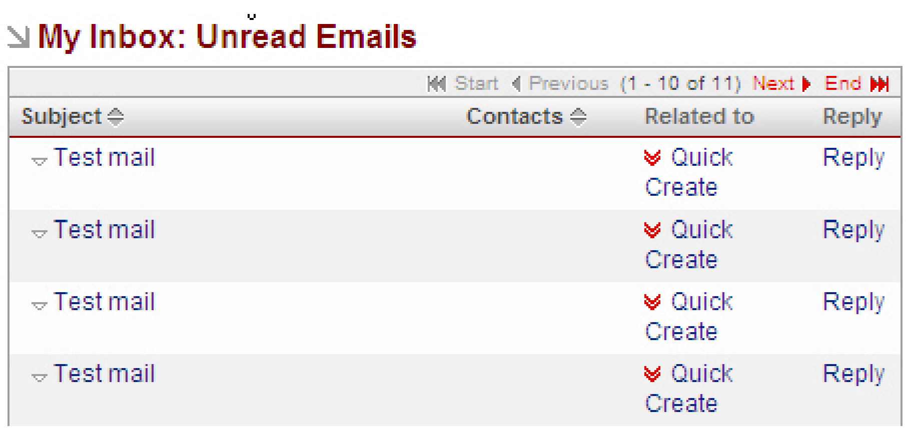


Figure 44: My Inbox

Group Inbox

The Group Inbox is designated for the Group user. This Inbox contains emails that are NOT assigned to specific users. These emails can be assigned to individuals using algorithms such as round robin, least busy, and direct assignment with the Using Rules drop down menu.

This illustration shows a Group Inbox containing items from monitored mailboxes:

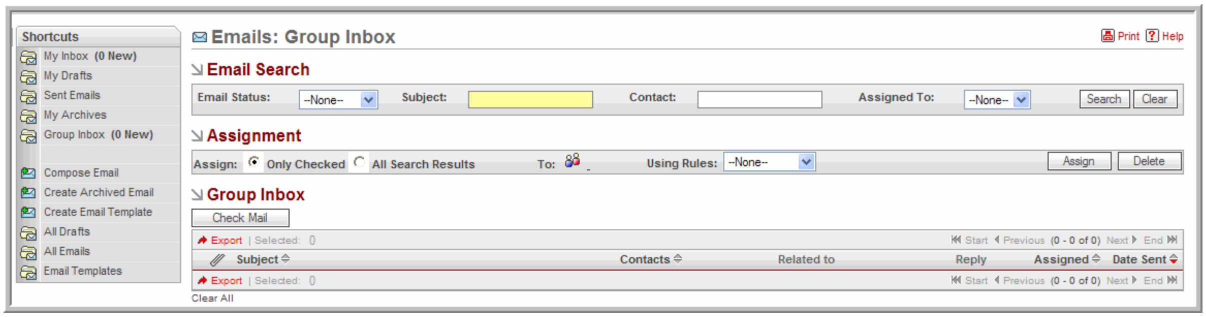


Figure 45: Group Inbox

Inbound Email

The Inbound Email feature provides the capability to monitor, route, assign, and reply to emails. Multiple mailboxes can be monitored, such as support@company.com or sales@company.com. Items contained in these email boxes can be parsed and associations made to applicable existing Sugar records, such as an email for a given Case ID. Emails that do not reference existing Sugar records can be placed in a Group Inbox and subsequently assigned and worked.

Inbound Email processing functionality has been exposed in other areas of the application, like the Home Screen with the new My Inbox area.

- Emails retrieved from monitored mailboxes are put in the Group Inbox (which is accessible via the Emails module).
- Items in the Group Inbox can be assigned and/or distributed to users.
- Once distributed, the items appear in the user's My Inbox.
- Email items residing in the Group Inbox can be assigned to specific individuals or to individuals within teams. With either option, you can distribute the assignment based on two available assignment options: round-robin or least-busy. You can choose to assign single email items or in bulk by using the "Only Checked" and "All Search Results" options.
- From My Inbox, a user can create a lead, case, or contact.

Navigation Shortcuts

Navigation Shortcut – Compose Email: This is the edit screen for composing an email message. Standard text fields such as To, Cc, Bcc and subject field are near the top of the panel. If you want to add an attachment to the message, you can do so by clicking the add file button at the bottom of the page.

To view the formatting menu options, click the down arrow above the text field.

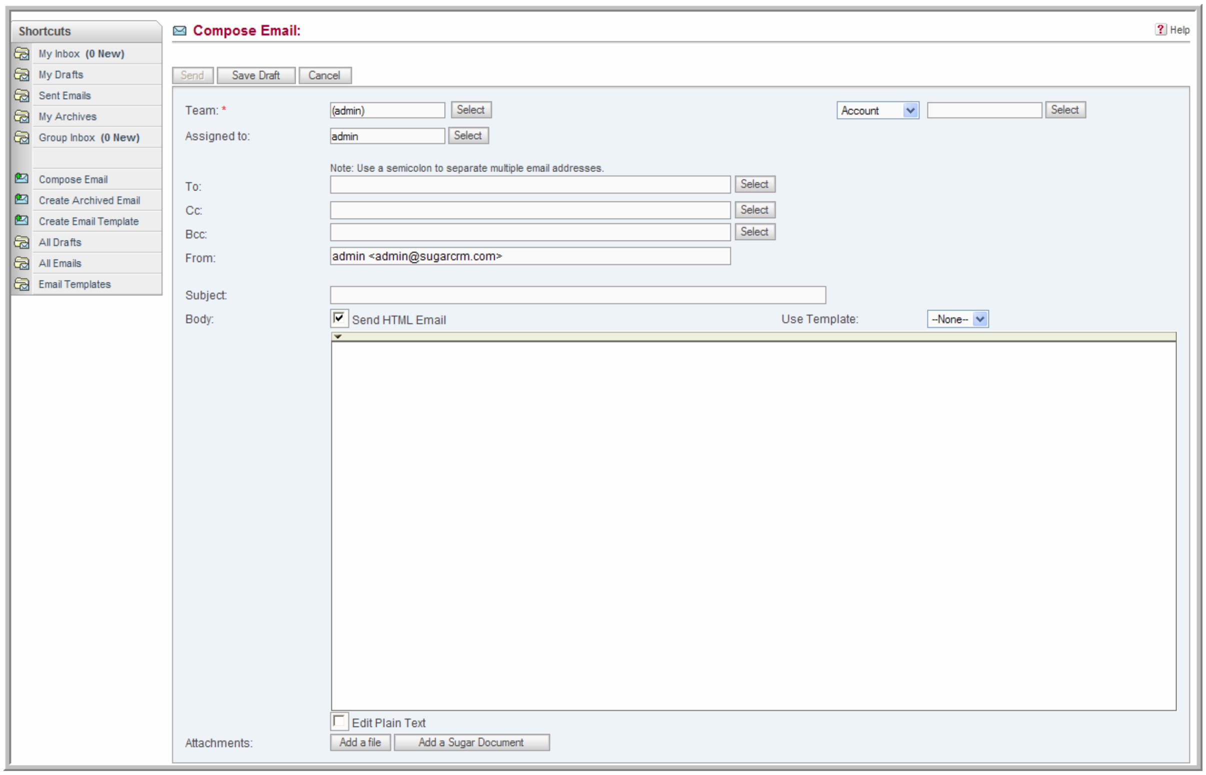


Figure 46: Emails Module (Compose Email Edit View)

Navigation Shortcut – Create Archived Email: You can create archived email using this screen. It is similar to compose email in functionality and also includes the option of linking account information from the account list. The difference between compose email and archived email is that archived email will not be able to send an email.

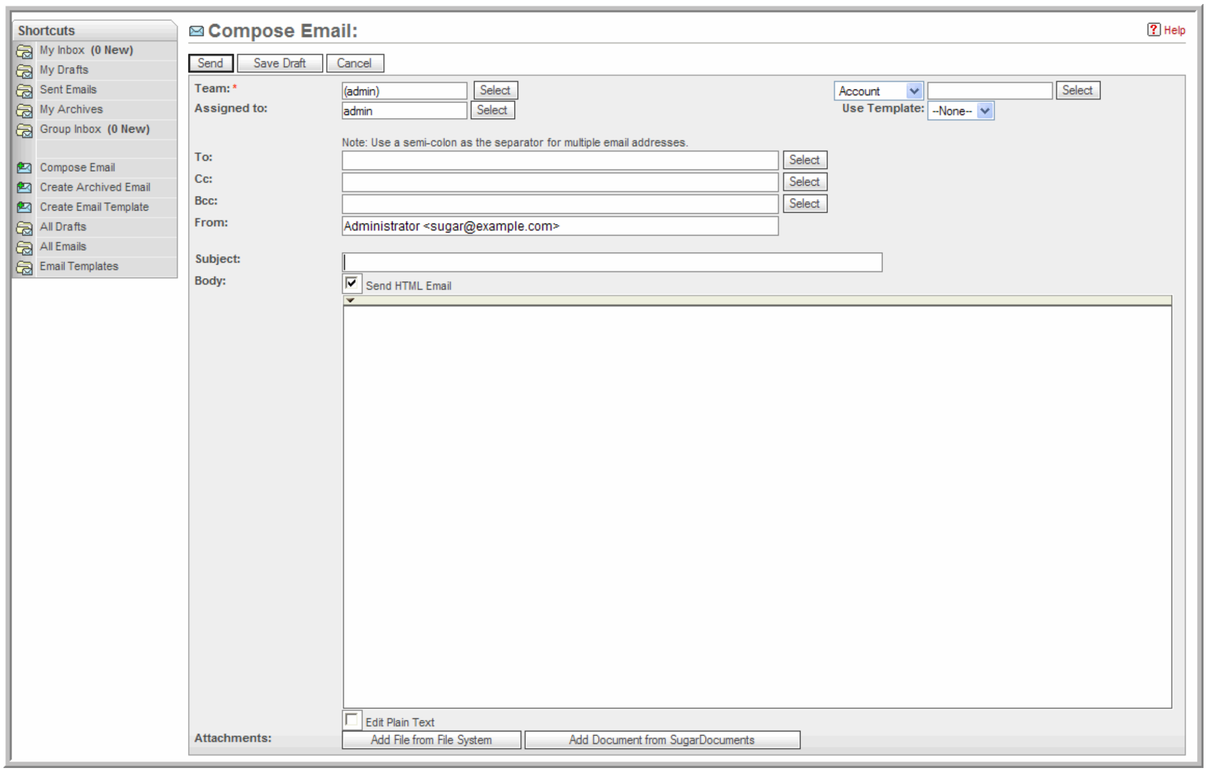


Figure 47: Emails Module (Create Archived Email Edit View)

Navigation Shortcut – Create Email Template: You can create an email template by using the template feature. Be sure to create a name for the template. The name is used as the search criteria in the email template list view and it will also show up on the template list. This template also has the option of inserting variables from accounts or contacts to save the time of searching for them when needed.

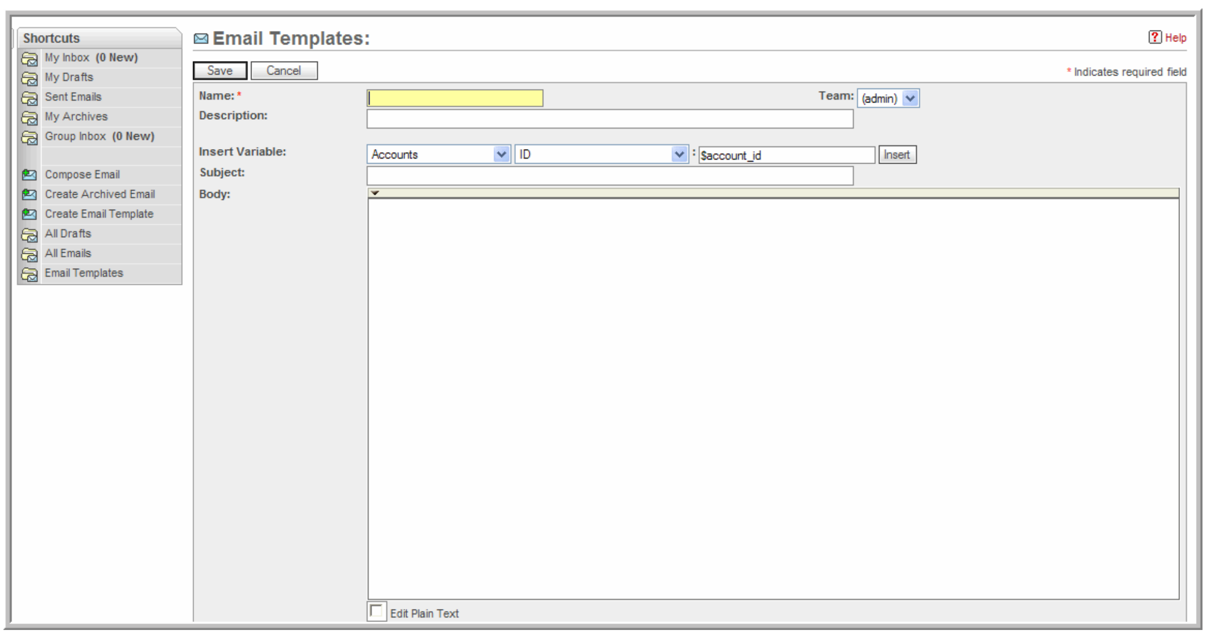


Figure 48: Emails Module (Create Email Template Edit View)

Campaigns Module

The Campaigns Module list view is selected using the Campaigns navigation tab:

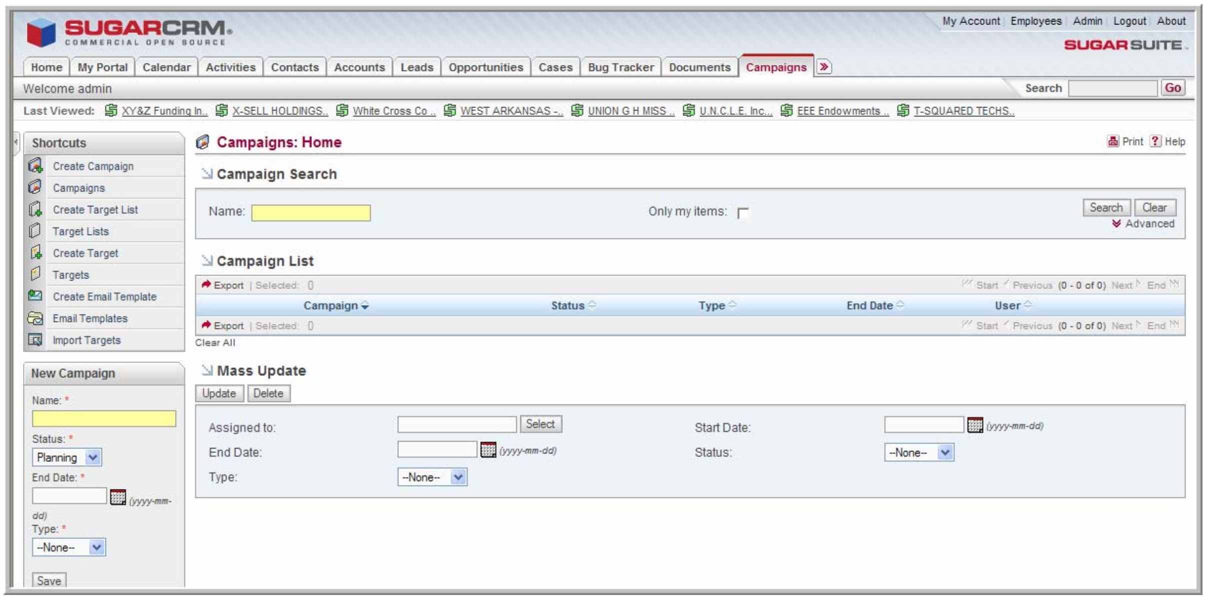


Figure 49: Campaigns Module

You can create campaigns to track and manage marketing campaigns and targets. You can create a campaign and then create a target list. Then you can add targets to the list by importing them from file (either CSV or TSV) or by selecting them from Contacts or Leads. Targets contain all the contact information for each target.

The Campaigns module has the following capabilities and features:

- A Schedule button on the Campaign setup screen that allows campaign managers to designate exactly when an email campaign should begin queuing outbound emails.
- List management is available which can create multiple types of list such as seed, test, and suppression (do not send to this person) lists.
- Email templates can be designated at the Target List level within a campaign rather than applying to the entire campaign. This allows finer control over the emails you deliver within a single campaign.
- Email templates can be created directly from within the Email Marketing screen.
- An Activity View screen provides a tracking view of the Campaign. In the Campaign Activity View, various aspects of the campaign can be monitored including:

    Messages Sent/Attempted
    Messages resulting in an error when sending
    Invalid emails
    Click-thru Link
    Message opened
    Opted out

- If you create an Email Campaign, an additional Email Campaign section displays at the bottom of the screen. You can specify the From Name and From Email Address and the date you want the email to be sent to the targets. You must also select an Email Template created in the Email module. When viewing the campaign, an additional list displays the status of scheduled email campaigns and allows you to edit or remove email campaigns that are waiting to be sent. When you remove an email campaign from the Email Marketing list, it deletes all of the emails related to the campaign but does not delete the campaign. Status for email campaigns in the Email Marketing list can be In Queue, In Progress, or Sent.

- For email campaigns, you can also specify settings for a Tracker Redirect URL which contains a hyperlink in the email that goes to a Web page and Tracker Link Text which is the displayed text for the hyperlink. After the emails have been sent, the Tracker Count displays how many times the Redirect URL has been clicked by readers of the emails.
- The Campaigns module provides a list of all or selected campaigns from a recent search. Each campaign in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all selected campaigns. For example, you might want to change the end date for several campaigns at one time. Clicking on a campaign displays details about the campaign.
- The View Change Log link shows views of the old and new values for fields that track changes. The tracked fields include Assigned User, Start Date, End Date, Status and Type.

Creating an Email Campaign

Confirm with your system administrator that the outbound email process is configured to send email from your system as described in Configure System section and Mass Emailing section.

- Create a campaign.
- Create or select an associated target list.
- Create an email marketing record associated with the campaign.

If the target list has no associated targets, create or add targets to the target list.

Creating a Campaign

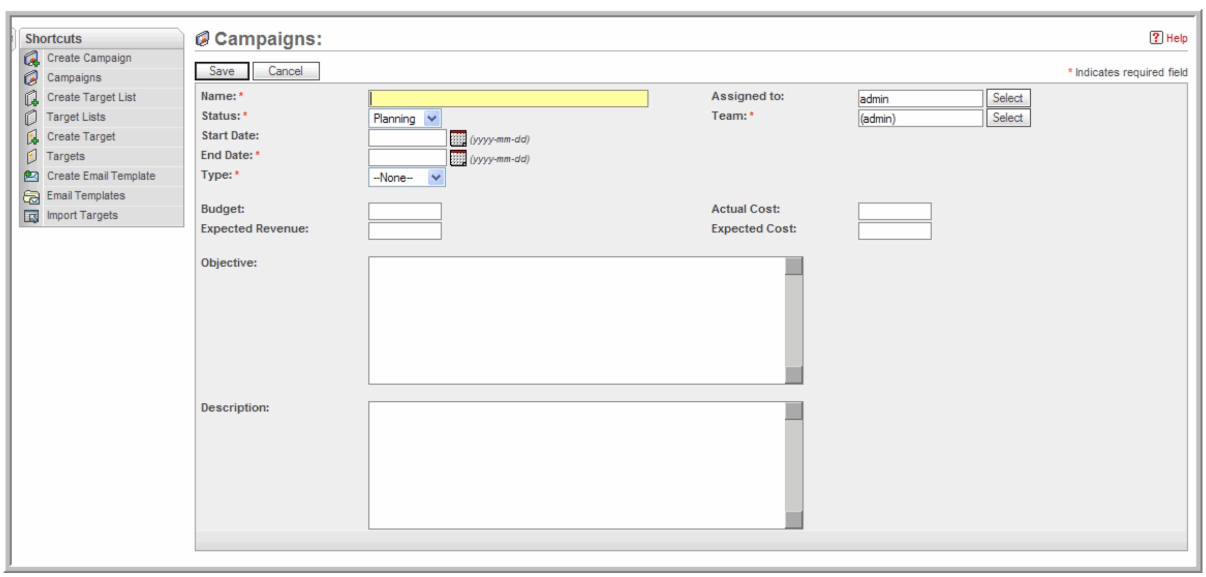


Figure 50: Creating a Campaign

Use the start date and end date to indicate when a campaign takes place. Note that these values do not impact the execution of an email marketing campaign. Use the Campaign status to track the current planning stage of the campaign. Like the start/end dates, the status value does not impact the execution of an email marketing campaign.

In an email marketing campaign, the Tracker URL is appended to the end of every outbound email message inside of Tracker Link Text. When a recipient receives the email and clicks on the Tracker URL Link logs the visit in the campaign tracking system.

Example: Campaign Management via Email

The following instructions demonstrate campaign management by executing an email campaign. The Campaign Manager has capabilities to manage many campaign types such as web, direct mail, email, etc.

1. Create Campaign.
2. Import Lists and optionally:
   - create Target List – specify the type of list (standard, test, seed, etc.)
   - merge with existing Target List
3. Select targets, leads, contacts, etc. for the campaign.
4. Select or create email.
   - add custom variables and messages
   - associate email by list or to entire campaign
   - assign launch date for the email
5. Select Launch Test button.
6. Send Test email.
7. Clear statistics from Test.
8. Launch Campaign.
9. Optionally, convert Targets into Leads.

Notes:

- Test lists are lists of people used to test your campaign before launch.
- Seed lists are lists of people that need to be considered in the campaign but should not be tracked as a potential lead.
- Test and seed lists are ignored in email tracking statistics.
- The start date selected in the email marketing screen determines when the email is sent.

Creating a Target

Targets created in this screen are stand-alone records that are not attached to Contacts or Leads. These records are stored in their own table and completely separate from Contact and Lead records.

If you plan to send emails to existing Contacts or Leads, you can skip this step.

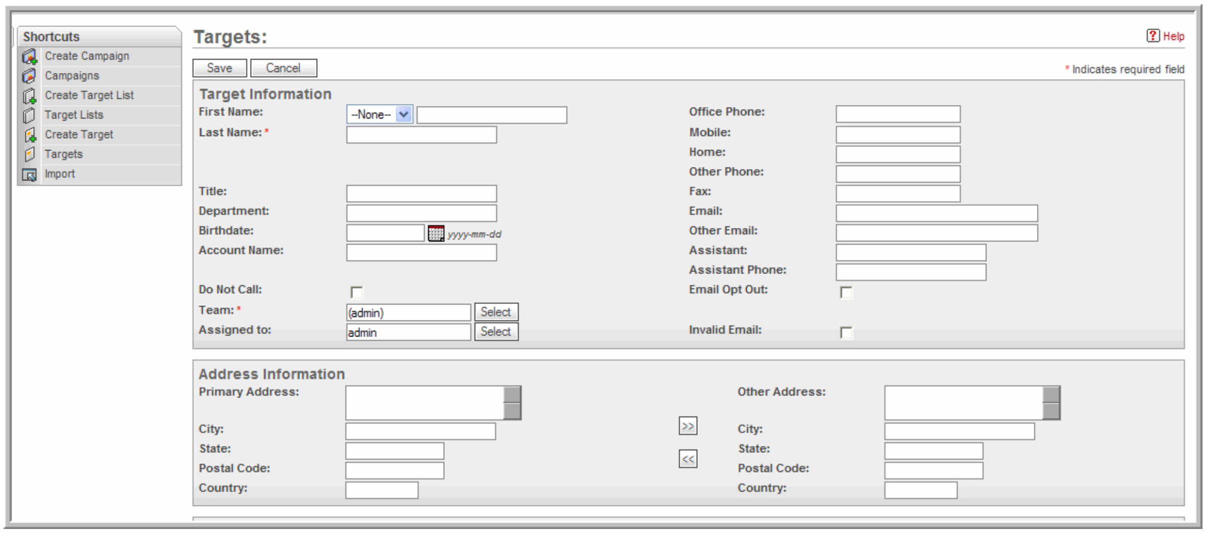


Figure 51: Creating a Target

Creating a Target List

Target Lists are groupings of Contact, Lead, Target, or User records. You can add Contacts or Leads to a Target List using a saved Contact or Lead report.

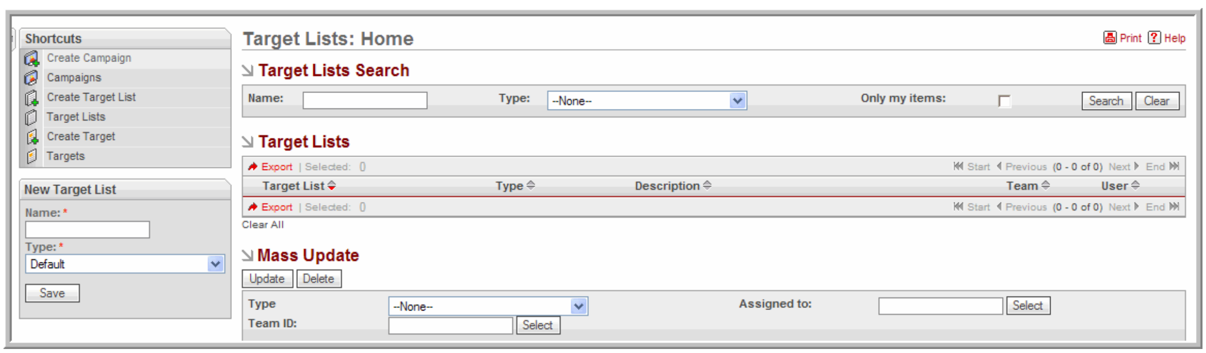


Figure 52: Creating a Target List

You can create a target list to send your campaign email on everybody on the list or to exclude specific individuals or even entire domains. You can also send an email to the appropriate individuals notifying them that the campaign has begun.

Choose one of the following options from the Type drop-down list:

- **Default** Send the campaign email to everybody on the target list.
- **Seed**. Send an email to specified individuals in your organization notifying them that the campaign has started.
- **Test**. Send a test campaign email to the specified individuals.
- **Suppression List – By ID**. Suppress the campaign email from the listed users. The system automatically identifies the user IDs at run time.
- **Suppression List – By Email Address**. Suppress the campaign email from the specified email addresses.
- **Suppression List – By Domain**. Suppress the campaign email from the specified domain.

Creating an Email Marketing Record

An email marketing record can be created for each campaign. As soon as a target list is attached to the parent campaign record and the email marketing start date and time is in the past, outbound emails is queued for delivery. It is very important to note that every time the email marketing record is saved and the start date is in the past, the email is queued for delivery. Be careful of this condition as you could inadvertently send duplicate emails.

Create or choose an email template to be used for sending out campaigns. Note that email marketing campaigns will only start executing if the start time is in the past. Any email bounce backs are sent to the From address defined in this record.

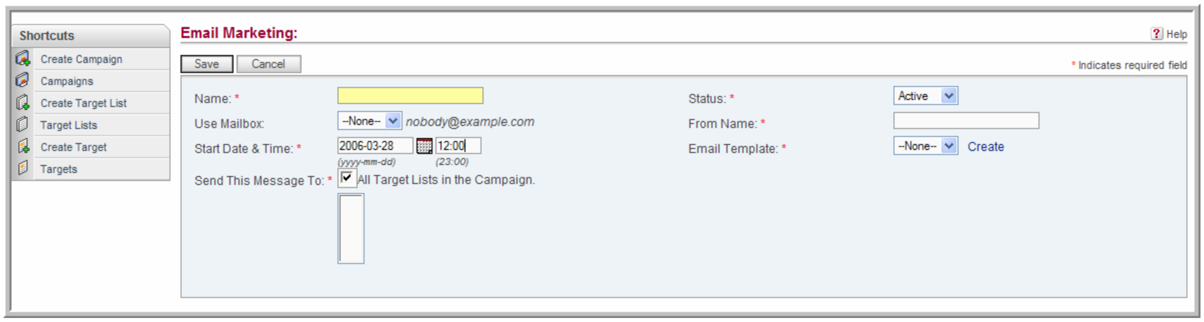


Figure 53: Creating an Email Marketing Record

You can wrap the Tracker URL link defined in the campaign around any text in the outbound email by simply putting the keywords TRACKER_URL_START and TRACKER_URL_END around the text you wish to be turned into a hyperlink.

Example: Campaign Detail View

The following illustrates a detail view of a campaign management example:

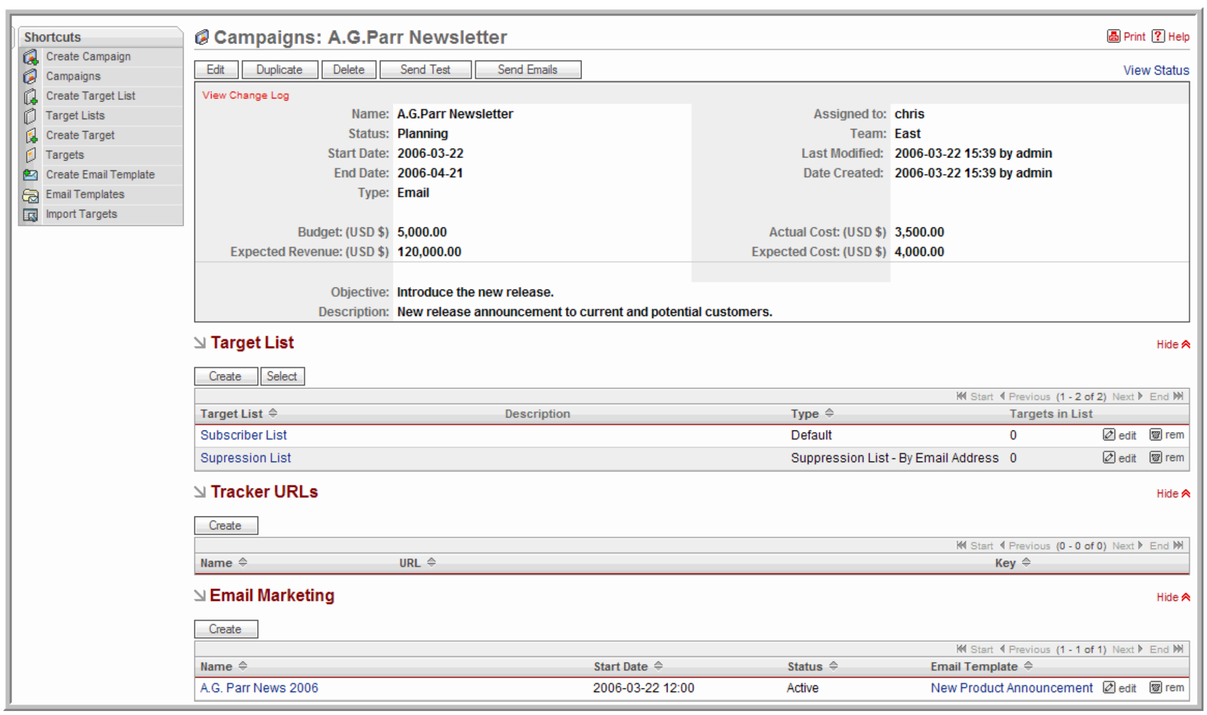


Figure 54: Campaign Detail View Example

Example: Campaign View Status

The View Status link provides information about the campaign including a campaign summary, message queue, message attempts, contacts created, and bounced emails among other statistics. The following illustrates some View Status information of a campaign management example. This illustration is an incomplete view of Campaign status information.

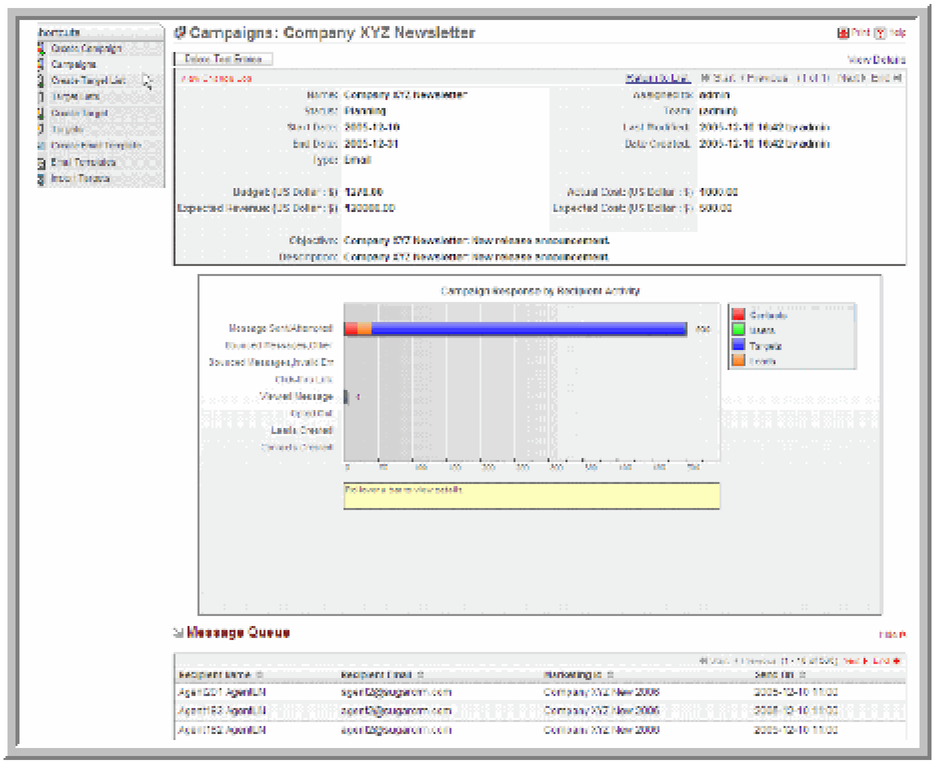


Figure 55: Campaign View Status Example

Navigation Shortcuts

Navigation Shortcut – Create Campaign: The edit view of the campaign module provides the form for creating a new campaign. The required fields are:

- Name – This is the short descriptive name for the campaign.
- Status – This indicates the stage where the campaign is at such as planning, active, inactive, or complete.
- End Date – This is end date of the campaign.
- Type – This indicates what type of campaign it is? (mail, telephone, email etc.)

The tracker redirect URL text box is on the bottom of this panel.

Navigation Shortcut – Create Target: This edit form allows you to create a new target. This screen is divided into the following sub-panels:

- Target Information - Last Name is the required field so it needs to be filled in order for the application to save the new target detail.

- Address Information - This section has the space for primary address and other address. You can enter the address information on either one of the sections and duplicate the information by using the arrow buttons.
- Description Information – This is space for adding extra notes to this target.

A target is someone who you have some information on but who doesn’t qualify as a lead or contact. The components and process of using the Campaigns module begins with a target. After you have more than one target, you can group the targets into a target list according to a set of predetermine criteria such as age group or spending habit. When a new marketing campaign is created, the user can go back to the campaign and add the target list from the Campaigns List.

The general process flow is as follows:

Targets → Target List → Campaign → Campaigns List

Projects Module

The Projects Module list view is selected using the Projects navigation tab:

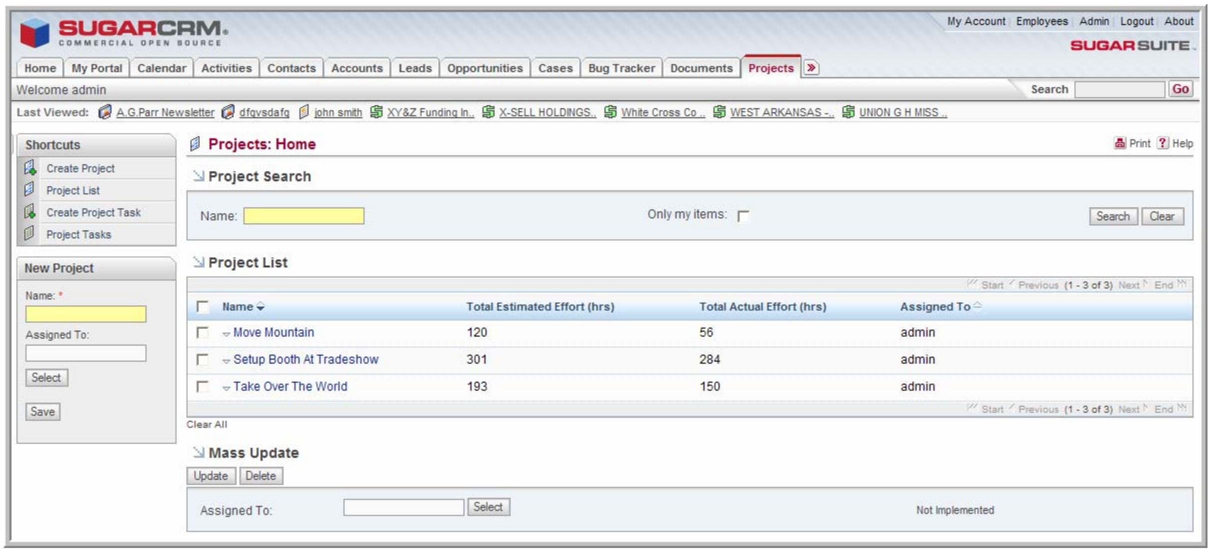


Figure 56: Projects Module

You can create Projects that contain Tasks. To create a Project, click the Create Project shortcut and type a Project name and assign the Project to a person. Then you can create tasks belonging to the Project. Tasks include details such as status, starting date, due date and measures of effort to complete the task.

The Projects module provides a list of all or selected Projects from a recent search. Each Project in the list has a check box at the left, and at the bottom of the screen is a facility to update the Assigned To value for all selected Projects. The Total Estimated Effort column in the Project list view is the sum of all Project Tasks' estimated effort. The Total Actual Effort column in the Project list view is the sum of all Project Tasks' actual effort. Projects can be searched from the global search box in the top-right corner of the application.

Project Lists

The Projects list may be sorted by clicking on any column title which has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order.

The Projects list is paginated if it contains more items 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.

- Clicking on the subject for any Project in the list displays the detail information for that Project.
- In the History sub-panel, click the Summary button to view history information at a glance instead of selecting each item to view.
- For Project Tasks, click the View Change Log link to view the old and new values for fields that track changes. The tracked fields include Assigned User, Status, Due Date, Start Date, and Percent Complete.

You can indicate a Project Task dependency by choosing a Project Task in the Depends On field.

- The Utilization field indicates how much time a user is supposed to dedicate their work hours towards the assigned task. Only one person can be assigned to a given Project Task.

- The Progress field is available for the user to update to indicate how far along a Project Task is.
- The Task Number can be used to uniquely identify a task by number and can be used instead of referring to a task by Name.
- The Order field can be used to indicate what sequence a list of project Tasks should be performed in which is useful for Project Tasks that do not have tasks with dependencies assigned to them. All Project Tasks must be assigned to a Project. However, a Project may be associated to one or more Contact, Account, or Opportunities.
- Project Tasks under the Project tab are separate from Tasks under the Activities tab.
- The Milestone flag can be used to signify that a Project Task is significant as some sort of milestone along the Project lifetime.

Navigation Shortcuts

The navigation shortcuts help you to create a new Project or you can switch back to the Project list view to create a new Task or view all Project Tasks. You can link Projects to Contacts, Accounts, and Opportunities.

Navigation Shortcut – Project List: The list view displays a list of projects in the system. You can search for a particular project by using the search panel at the top of the screen. Remember to use the clear button to clear out the search value in the search box after the search is complete. This allows you to see a complete list of projects.

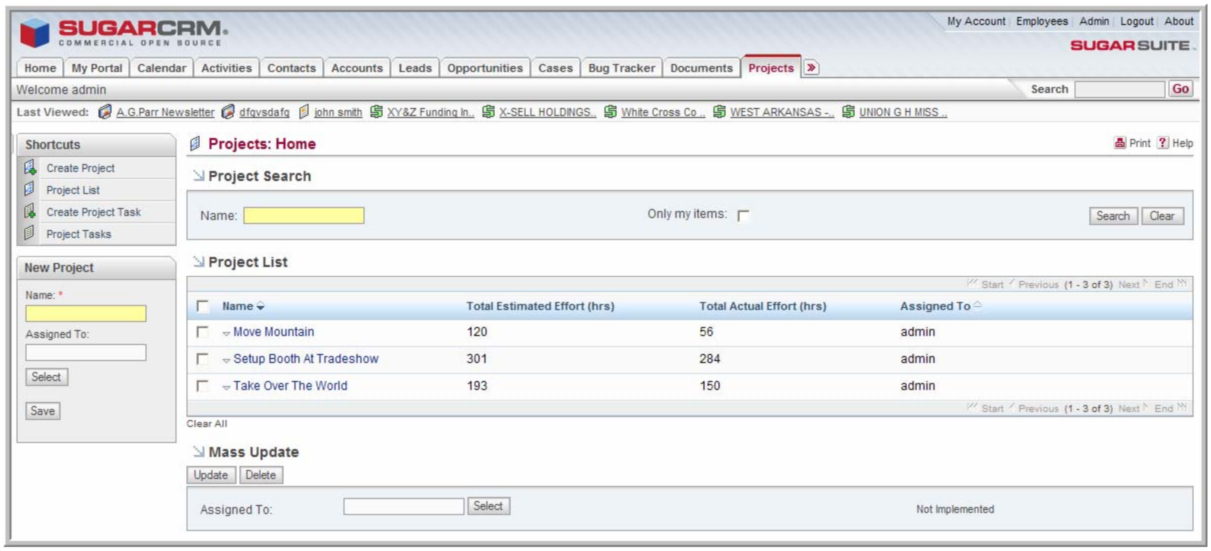


Figure 57: Projects Module (Project List View)

Navigation Shortcut – Create Project: In this edit view, you can create a new project by filling out the information in the text box provided. The Name text field is a required field. You must enter the name so the new entry can be saved in the project list.

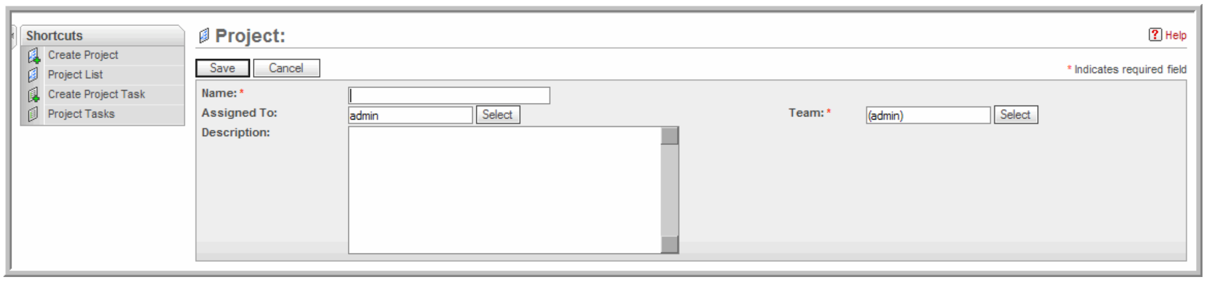


Figure 58: Projects Module (Create Project Edit View)

Navigation Shortcut – Create Project Task: This edit view is for creating tasks related to the project. The required fields are the task's name and project. Enter a descriptive name for the name of the task and select the project from the list that is in the system.

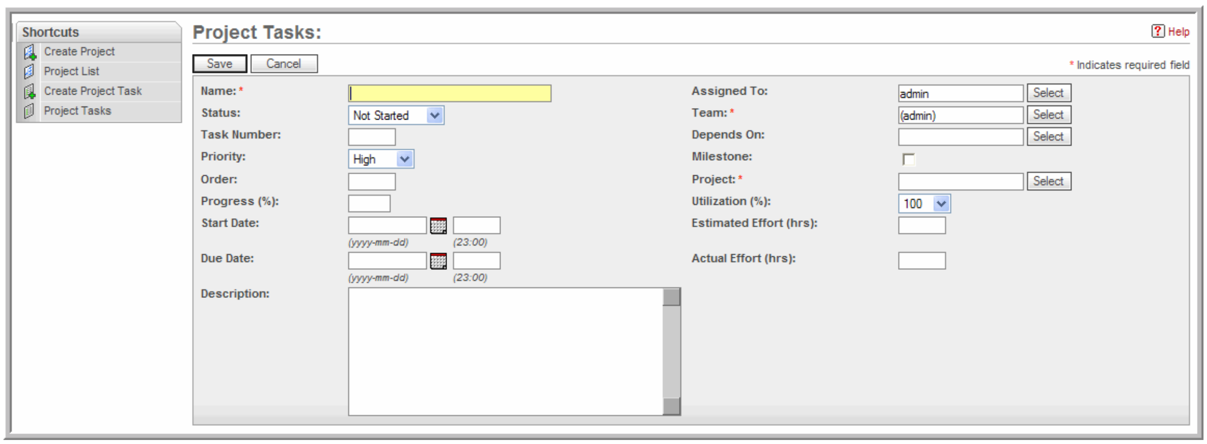


Figure 59: Projects Module (Create Project Task Edit View)

RSS Module

The RSS Module list view is selected using the RSS navigation tab:

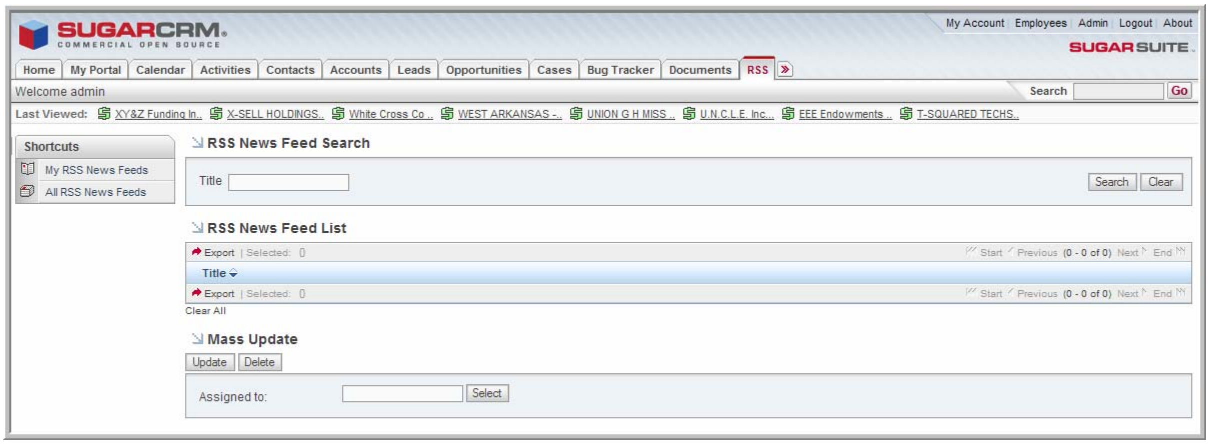


Figure 60: RSS Module

The RSS module manages RDF Site Summary (RSS) feeds. These feeds provide news or other web content that is syndicated by web sites which publish their content in this manner. Sugar Suite has hundreds of RSS feeds available as it is supplied, and others may easily be added via the New RSS Feed data entry box to create your own custom news-gathering experience.

- Click on the RSS Tab to open the *My RSS News Feeds* screen. This screen is assembled from all the feeds you have marked as your favorites, and shows the latest information being provided by those 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 items available from that feed. Each item listed has a brief title (which is linked to the full story or content) and the timestamp of when the item was added to the feed.
- Click on an item 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 items 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 items currently available from that feed.
- Use the controls, to add or remove a RSS News Feed from your list of favorites.

Dashboard Module

The Dashboard Module list view is selected using the Dashboard navigation tab:

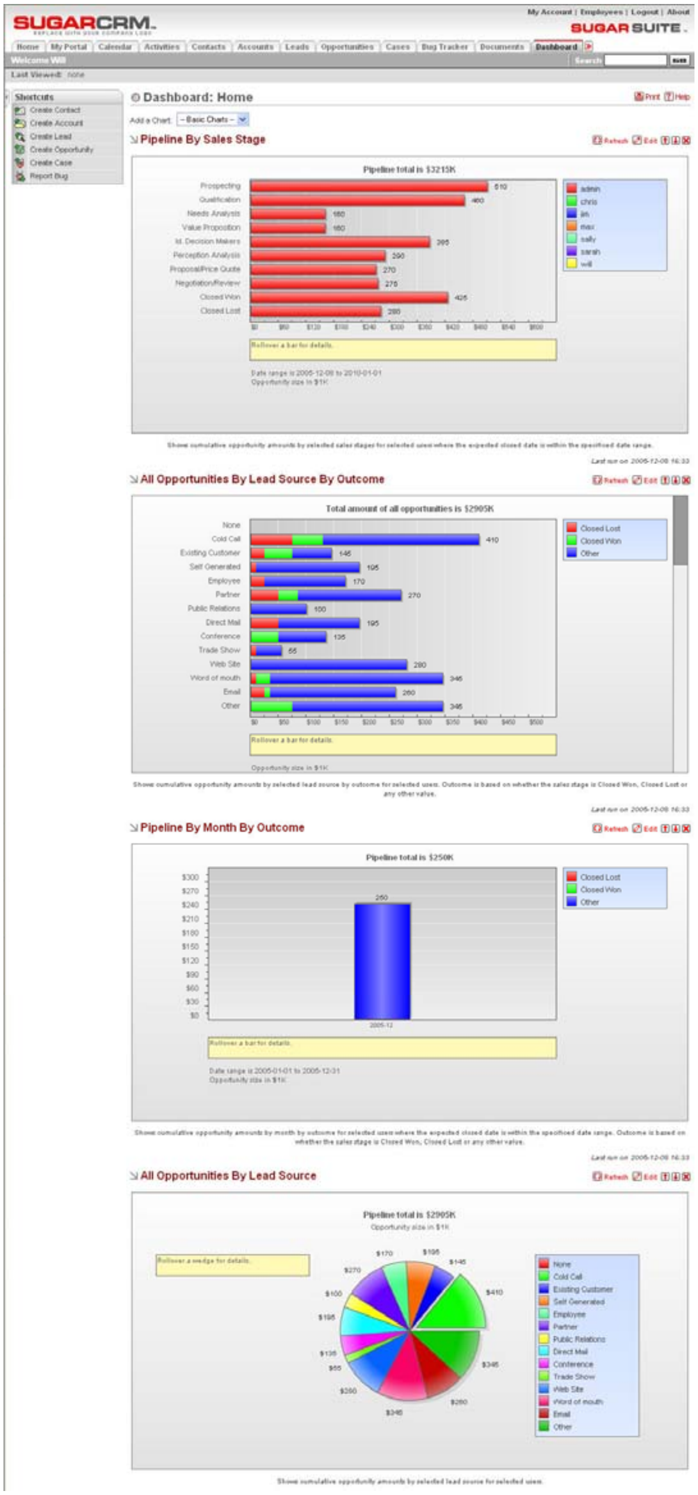


Figure 61: Dashboard Module

The predefined charts on the Dashboard display are

- A horizontal stacked bar chart of Pipeline by Sales Stage. Each bar shows the value of potential sales at each stage of the sales pipeline.
- A horizontal stacked bar chart of Opportunities by Lead Source by Outcome. It shows a stacked bar of the total opportunities for each lead source. Each bar is made up of multi-colored segments which represent the outcome proportions for that lead source.
- A stacked bar chart of Pipeline by Month by Outcome. Each bar shows 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.
- A pie chart of Opportunities by Lead Source. This shows a simple pie visualization of the proportion of total sales opportunities for each lead source.

Customizing Dashboard Charts

Each chart may be customized by clicking on the Edit button by the top right corner of the chart. This displays a small dialog area which permits you to specify parameters of the report, including (as appropriate):

- Date range or year for data to be charted
- User(s) for whom data should be charted
- Sales Stages to be charted
- Lead Sources to be charted

The following describes some common manipulations:

- To close the dialog box for each chart, Click on the Edit button again
- To produce a chart from different data, alter the parameters and click on the Select button.
- To set its display quality, to zoom the image, or to print it (charts are produced using Flash technology), right click on each chart.
- To rearrange the position of a chart, click and hold the mouse button on the chart title, move the chart to its new position, and then release the mouse.
- To copy a chart for inclusion in a document (as in the below), take a screen copy (such as by using Alt-Print Screen in Windows) and then crop the captured image in an image editor such as Photoshop.

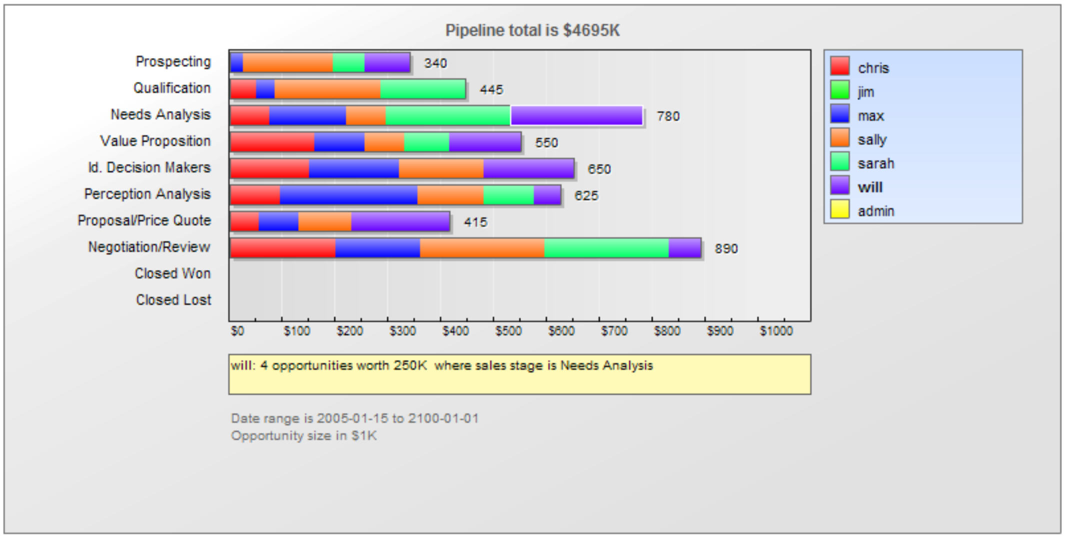


Figure 62: Sales Pipeline by Sales Stage Chart

A remarkably powerful feature of the Dashboard is that the charts allow for drilling down into the actual underlying data. This means that each distinctively colored area on every chart is actively linked to the set of opportunities it represents – simply click on an area to see those opportunities. For performance, their data sources are not automatically recalculated each time the Dashboard is displayed. To recalculate the data source for a given chart, simply click on the Refresh button associated with it (beside the Edit button).

Import and Export

One of the most important aspects of any CRM software is getting the data from your last CRM system moved across into the new one, and getting the data out of your new CRM system for use in other applications. Note that this should only be done by a system administrator.

Sugar Suite supports the importation of various kinds of data from several different popular contact managers and full CRM systems:

- Accounts may be imported from Salesforce.com, from ACT!, or from most other systems via a custom mapping.
- Contacts may be imported from Salesforce.com, from ACT!, from Outlook, or from most other systems via a custom mapping.
- Leads may be imported from Salesforce.com, or from most other systems via a custom mapping.
- Opportunities may be imported from Salesforce.com, or from most other systems via a custom mapping.

Importing Accounts and Contacts

Importing Contacts into Sugar Suite is fairly straightforward. First you use your old CRM application or contact manager to export the data into a Comma Separated Values (.CSV) file format. Then you use the import function within the Contacts module (accessible via the Navigation Shortcuts Box) to import the data. If a Contact record is imported which refers to an unknown Account, then a new record is automatically created for an Account of that name.

One thing to watch, however, is that when Account records are created automatically in this fashion, they are essentially empty – they have associated contacts, but no address or telephone information is recorded. Because of this, you should typically import your Account data first, creating the records complete with address and telephone information (plus perhaps Account Type and lots of other information, depending on your old CRM system). This avoids creating rather empty Account records, and having to manually add the rest of their information later.

See the sections below for exact steps on exporting and importing Contacts and Accounts.

Exporting Contacts from Your Current Contact Manager

This example uses Outlook 2003 for exporting contact manager data. Other systems tend to work in similar ways.

1. Under the File menu, select Import and Export. The Import and Export Wizard dialog box is then displayed.
2. Select the action *Export to a file*, and click the Next button.
3. Choose to create a file of the type *Comma Separated Values (Windows)*, and click on the Next button.
4. Select an Outlook folder from which to export – typically your contacts folder - and click the Next button.
5. Enter the filename and directory location for the exported file to be created, and click the Next button.

6. Confirm your intention to export this file by clicking on the Finish button.

The CSV file is then created by Outlook 2003. You can view the file easily, using Microsoft Excel or a simple text editor, to confirm that the data you intended has been exported.

Importing Accounts

If your Account data is coming in 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. If, however, your data is being imported from a simpler contact manager – such as Microsoft Outlook, then the only data available is Contact data, and you will have to be a bit creative to avoid a lot of manual data entry as described above.

If you are importing Account data from a full CRM, proceed now to step 5. If you only have 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 call the copy Accounts.csv.
2. Edit the Accounts.csv file using Excel. First, sort the file on the column which contains the Company name.
3. Now the more complex part: As you scroll through your data, sorted by Company name, you will see successive records which have the same company name, because there is more than one Contact from that Account (in Sugar Suite terminology). To avoid multiple copies of the same Account within Sugar Suite, you need to delete these duplicates. And to make sure that the best information is attached to the Account record, you should 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 Suite.
4. Now that you have a nice clean set of Account data, save the Excel file as a .CSV file type, and let's proceed to import this Account data.
5. Click on the import Accounts function within the Navigation Shortcuts Box of the Accounts module.
6. Specify the Data Source: Select Salesforce.com, ACT!, or Custom – then click on the Next button to continue. For 'massaged' Outlook files where the field names no longer match exactly what is exported from Outlook, use the Custom data source.
7. Upload the Export File: Use the Browse button to locate the Accounts CSV data file, and then click on the Next button to continue.
8. Confirm Fields and Import: This screen (see below) shows four columns of data. Column 2 (Header Row) is the key – this contains the names of the fields being exported from your old CRM or contact manager. Columns 3 and 4 show example data from the first two records you are about to import. Column 1 (Database Field) is where you come in – you need to use all of the drop-down box controls in this column to select the fields within Sugar Suite into which each incoming Account field is imported.

   Spend some time with this, exploring the names of the incoming fields, and the names of the corresponding Sugar Suite fields, until you are sure you have defined the optimum mapping between them. If you are importing from Outlook, a particularly important field mapping to get right is to map the incoming Company field to the Account Name field within Sugar Suite.
9. When you are satisfied you have the field mapping right, click on the Import Now button, at the bottom right of the screen. Before you do this you may choose to click on the Save As Custom Mapping checkbox, and provide a name for this mapping so that it may be used again in future.

10. The Import Results screen is displayed. It summarizes how many records were successfully imported, how many were skipped over, and the reasons they were skipped over. Below the summary are complete lists of all the data imported.
11. You can now choose to click on the Undo Last Import, Import More, or Finished buttons. Click on the Finished button if you are satisfied with the results of the data import, or Undo Last Import if you want to go back and try again – usually to improve the field mapping.

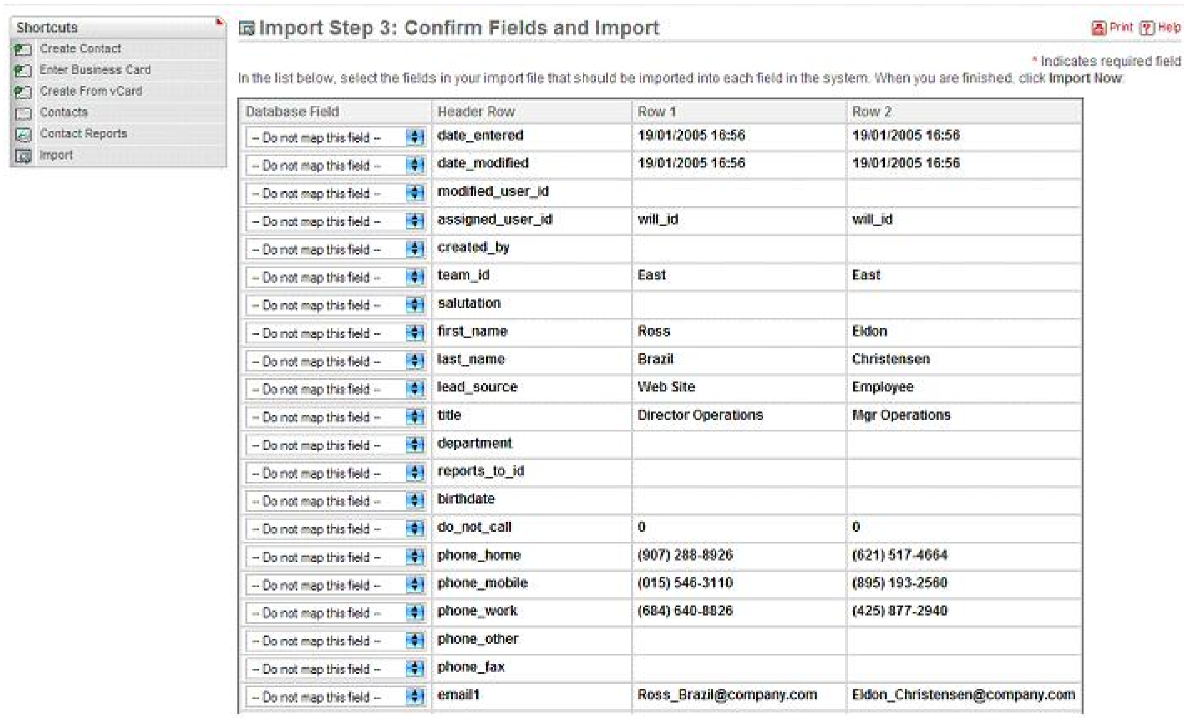


Figure 63: Confirm Fields and Import Screen

Importing Contacts

Now that you have a set of Account records with fully descriptive data, import your Contact data:

1. Click on the import Contacts function within the Navigation Shortcuts Box of the Contacts module.
2. Specify the Data Source: Select Salesforce.com, Microsoft Outlook, ACT!, or Custom – then click on the Next button to continue.
3. Upload the Export File: Use the Browse button to locate the data file exported by your contacts manager, and then click on the Next button to continue.
4. Confirm Fields and Import: This screen shows four columns of data. Column 2 (Header Row) is the key – this contains the names of the fields being exported from your old CRM or contact manager. Columns 3 and 4 show example data from the first two records you are about to import. Column 1 (Database Field) is where you come in – you need to use all of the drop-down box controls in this column to select the fields within Sugar Suite into which each incoming Contact field is imported.

   Spend some time with this, exploring the names of the incoming fields, and the names of the corresponding Sugar Suite fields, until you are sure you have defined the optimum mapping between them. If you are importing from Outlook, a particularly important field mapping to get right is to map the incoming Company field to the Account Name field within Sugar Suite, so that Contacts are associated with the correct Accounts.

5. When you are satisfied you have the field mapping right, click on the Import Now button, at the bottom right of the screen. Before you do you may choose to click on the Save As Custom Mapping checkbox, and provide a name for this mapping so that it may be used again in future.
6. The Import Results screen is displayed. It summarizes how many records were successfully imported, how many were skipped over, and the reasons they were skipped over. Below the summary are complete lists of all the data imported – both Contacts, and any Accounts which were automatically created.
7. You can now choose to click on the Undo Last Import, Import More, or Finished buttons. Click on the Finished button if you are satisfied with the results of the data import, or Undo Last Import if you want to go back and try again – usually to improve the field mapping.

Importing Leads and Opportunities

Leads and Opportunities are typically only tracked by a full CRM system, not a simple contact manager. If your old system is Microsoft Outlook or a similar contact manager, then you will have no data to import. If you are migrating from a full CRM system such as Salesforce.com, then the Lead and Opportunities data may be exported from that system and imported into Sugar Suite in a very similar fashion to importing Contact data, as described above.

Exporting Information

Sugar Suite has quite flexible data exporting capabilities. Essentially all of the Sugar Suite modules have an export function, accessed by clicking on the Export link in the top left corner of the list portion of each list view screen, including all five types of Activities, Accounts, Contacts, Leads, Opportunities and Cases.

In each case, a Comma Separated Values (.CSV) file is produced, which contains all the currently selected records from the module in use (not just those records currently displayed on the screen). CSV files can be opened by Microsoft Excel for viewing or by Notepad, WordPad, and other text editors – and can easily be parsed as input files by most software.

A sample portion of a CSV file, exported from the Accounts module and viewed in Excel, is shown in below. You can see that essentially the entire database table of information is exported in the CSV file with column titles, including the Record ID (a long and largely incomprehensible string of letters and numbers used as a unique reference to each Account record) and other fields which Sugar Suite uses internally.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	id	date_entered	date_modified	mod	as:	name	par	account_type	industry	an	pho	billing_address_street	billing_address_city	billing_address_state
2	874fd	01/12/2004 20:00	01/12/2004 20:00		1	Otc Bb		Customer	Government			9 IBM Path	St. Petersburg	CA
3	89ee(	01/12/2004 20:00	01/12/2004 20:00		1	2M Invest A/S		Customer	Not For Profit			777 West Filmore	Santa Monica	NY
4	8ba6f	01/12/2004 20:00	01/12/2004 20:00		1	A 77 Capital Inc		Customer	Education			345 Sugar Blvd.	Santa Monica	CA
5	8d5ef	01/12/2004 20:00	01/12/2004 20:00		1	Absa Group Limited		Customer	Education			999 Baker Way	Los Angeles	CA
6	8f274	01/12/2004 20:00	01/12/2004 20:00		1	Ab Watley Group Inc		Customer	Telecommunications			111 Silicon Valley Road	San Francisco	NY
7	90e1!	01/12/2004 20:00	01/12/2004 20:00		1	Ag Media Group Inc		Customer	Engineering			123 Anywhere Street	Cupertino	CA
8	92c5c	01/12/2004 20:00	01/12/2004 20:00		1	Aits Inc		Customer	Manufacturing			9 IBM Path	Cupertino	CA
9	9478c	01/12/2004 20:00	01/12/2004 20:00		1	Ail Intech		Customer	Banking			123 Anywhere Street	Salt Lake City	NY
10	9626(	01/12/2004 20:00	01/12/2004 20:00		1	Ami Resources Inc		Customer	Energy			345 Sugar Blvd.	Persistance	CA
11	97ed2	01/12/2004 20:00	01/12/2004 20:00		1	Ams Marketing		Customer	Shipping			48920 San Carlos	Alabama	CA
12	999e4	01/12/2004 20:00	01/12/2004 20:00		1	A Novo Broadband Inc		Customer	Chemicals			48920 San Carlos	Alabama	NY
13	9b4ac	01/12/2004 20:00	01/12/2004 20:00		1	Aoi Coal Co		Customer	Machinery			9 IBM Path	Cupertino	CA
14	9cf86	01/12/2004 20:00	01/12/2004 20:00		1	Art International Inc		Customer	Shipping			321 University Ave.	Cupertino	CA
15	9ea5!	01/12/2004 20:00	01/12/2004 20:00		1	A&D Co Ltd		Customer	Media			123 Anywhere Street	Sunnyvale	NY
16	a055(	01/12/2004 20:00	01/12/2004 20:00		1	A&E Capital Funding Inc		Customer	Not For Profit			48920 San Carlos	San Mateo	CA
17	a204c	01/12/2004 20:00	01/12/2004 20:00		1	A-Com Ab		Customer	Telecommunications			67321 West Siam St.	Ohio	CA
18	a3cee	01/12/2004 20:00	01/12/2004 20:00		1	A-Fem Medical Corp		Customer	Hospitality			345 Sugar Blvd.	San Mateo	NY
19	a57f3	01/12/2004 20:00	01/12/2004 20:00		1	A-Max Holdings Ltd		Customer	Shipping			1715 Scott Dr	Santa Monica	CA
20	a73b(	01/12/2004 20:00	01/12/2004 20:00		1	A-S China Plumbing Products		Customer	Shipping			777 West Filmore	San Mateo	CA
21	a8f28	01/12/2004 20:00	01/12/2004 20:00		1	A. Schulman Inc		Customer	Utilities			111 Silicon Valley Road	San Jose	NY
22	aa9ec	01/12/2004 20:00	01/12/2004 20:00		1	A.A Importing Company Inc		Customer	Machinery			48920 San Carlos	Sunnyvale	CA
23	ac55(	01/12/2004 20:00	01/12/2004 20:00		1	A.C. Moore Arts & Crafts Inc		Customer	Utilities			123 Anywhere Street	San Mateo	CA
24	ae037	01/12/2004 20:00	01/12/2004 20:00		1	A.C.L.N. Ltd		Customer	Government			321 University Ave.	Santa Fe	NY
25	afcbc	01/12/2004 20:00	01/12/2004 20:00		1	A.D.A.M. Inc		Customer	Utilities			777 West Filmore	St. Petersburg	CA
26	b177c	01/12/2004 20:00	01/12/2004 20:00		1	A.G. Barr Plc		Customer	Chemicals			345 Sugar Blvd.	Denver	CA
27	b349(	01/12/2004 20:00	01/12/2004 20:00		1	A.G. Edwards Inc		Customer				123 Anywhere Street	Ohio	NY
28	b4f8c	01/12/2004 20:00	01/12/2004 20:00		1	A.G.D. Mining Ltd		Customer	Communications			123 Anywhere Street	San Francisco	CA
29	b6ed4	01/12/2004 20:00	01/12/2004 20:00		1	A.J. Ross Logistics Inc		Customer	Food & Beverage			999 Baker Way	Los Angeles	CA
30	b89ac	01/12/2004 20:00	01/12/2004 20:00		1	A.M. Castle & Co		Customer				1715 Scott Dr	San Francisco	NY
31	ba4bc	01/12/2004 20:00	01/12/2004 20:00		1	A.O. Smith Corp		Customer	Entertainment			67321 West Siam St.	St. Petersburg	CA
32	bc17:	01/12/2004 20:00	01/12/2004 20:00		1	A.O.G. Air Support Inc		Customer	Biotechnology			9 IBM Path	St. Petersburg	CA
33	bdcf5	01/12/2004 20:00	01/12/2004 20:00		1	A.T. Cross Co		Customer	Communications			123 Anywhere Street	San Mateo	NY
34	bf95e	01/12/2004 20:00	01/12/2004 20:00		1	A.T.&E. Corp		Customer	Utilities			9 IBM Path	Los Angeles	CA
35	c159(	01/12/2004 20:00	01/12/2004 20:00		1	Abitibi-Consolidated Inc		Customer	Shipping			777 West Filmore	Cupertino	CA
36	c32b1	01/12/2004 20:00	01/12/2004 20:00		1	Aes Gener S A		Customer	Apparel			345 Sugar Blvd.	San Jose	NY

Figure 64: CSV File in Excel

System Administration

This section is intended for Administrators of Sugar Suite. Administrators access an additional System Administration screen by clicking on the Admin link. Note that the Admin link is only displayed for Administrator users. This section describes the main areas, their settings in System Administration screen, and other administrative tasks including:

- Sugar Network
- System
- Users
- Email
- Studio
- Bug Tracker

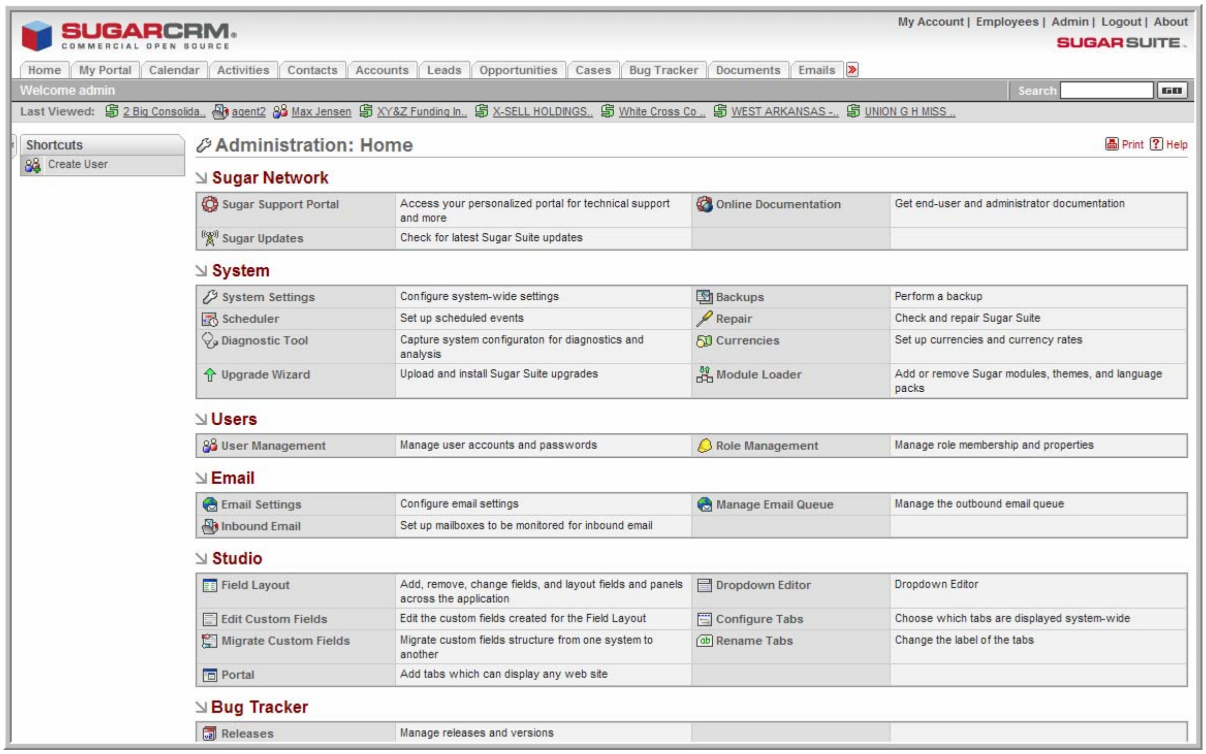


Figure 65: System Administration Module

Sugar Network

This section includes access to license information, the latest Sugar Suite versions, and online documentation.

Sugar Support Portal

Use this option to ask questions, search FAQs, download the latest product and documentation, and track bugs.

Online Documentation

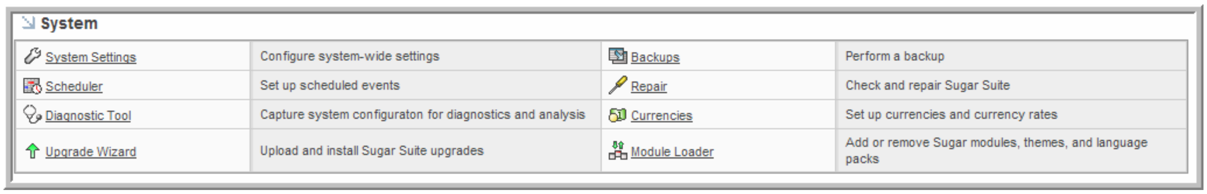
Use this option to access the Sugar Suite end-user and administrator documentation

Sugar Updates

When Sugar Updates is enabled, your system will periodically send SugarCRM, Inc. anonymous statistics about your installation. This information is used by SugarCRM, Inc. to track usage patterns and improve the product. In addition, administrators receive update notices when new versions or updates are available. You can check for updates automatically or manually by selecting the radio buttons and clicking the Check Now button.

System

This section consists of options to configure various settings including System Settings, Scheduler, Diagnostic Tool, and Upgrade Wizard.



System

System Settings	Configure system-wide settings	Backups	Perform a backup
Scheduler	Set up scheduled events	Repair	Check and repair Sugar Suite
Diagnostic Tool	Capture system configuraton for diagnostics and analysis	Currencies	Set up currencies and currency rates
Upgrade Wizard	Upload and install Sugar Suite upgrades	Module Loader	Add or remove Sugar modules, themes, and language packs

Figure 66: System Administration

System Settings

Use this section to configure settings such as the default system date and time, and organization logo for documents.

Scheduler

The Scheduler integrates with external UNIX and Windows systems to run jobs that you schedule through those systems.

You use the Scheduler to perform the following tasks:

Check inbound emails: This job polls all active mailboxes that have been set up for your organization.

Run nightly process bounced campaign emails: This job polls any mailbox whose “Possible Actions” parameter is set to “Bounce Handling”. This is an essential component of Mass Email Campaign monitoring.

Run nightly mass email campaigns

Prune the database: This job goes through every table in your Sugar database, finds records that have been soft-deleted (deleted = 1), creates a large SQL file, and physically deletes those records. It is mostly a performance job, and is not essential to the use of Sugar. The backup files are placed in cache/backups with timestamped filenames.

Configuring Settings for Scheduler Jobs

You must correctly configure the email settings to ensure that users are able to receive reports. For UNIX, you can use cron. For Microsoft Windows, you can use the Task Scheduler.

Unix and Linux Systems

Set the PHP binary (CLI or CGI) in the Apache user’s path.

If you have `root` user or sudo access to your Web server, login as `root` and then type the following:

su [apache|nobody|your apache user name]

After you have successfully become the apache user, type `php -v`.

If the operation is succesful, you will see output that is similar to the following:

PHP 4.4.1 (cli) (built: May 25, 2005 14:43:03)

If you see the error message: "php: command not found", you will have to locate the binary.

To locate the binary, type the following: `which php`.

Most secure Linux installations will not allow an Apache user to have startup scripts. Therefore, you will need to find out what paths the user has access to, and add a symlink to the PHP binary in those paths.

To locate the paths, do the following:

Type "`echo $PATH`" and note the paths that are available. Typically, the Apache user will have */bin:/usr/bin:/usr/local/bin etc.* in the path.

Navigate to /usr/local/bin.

If you are still operating as an Apache user, enter `exit` to go back to being the root user.

In /usr/local/bin, enter ln -s /path/to/the/php/binary/php

This is the same as the output you get from entering `which php`.

Ensure that the crontab entry is `root`, as follows:

Type `crontab -e` to enter the crontab editor (vi).

If the line that is Sugar's Scheduler screen is not there, add it now. If it is there, double check that it's formatted correctly:

As the Apache user, enter the following:

cd /path/to/sugar/crm; php -f cron.php > /dev/null 2&>1

You should now be able to use the inbound email functionality.

Windows Systems

Set up the Windows batch file as follows:

Go to the Scheduler screen in Admin -> Schedulers.

At the bottom of the default screen, you will see the contents of the commands you need to add to a batch file.

To create a batch file in Windows, open notepad.exe, copy & paste what Sugar tells you to into a blank file.

Change the Save As Type to “dropdown to All Files *.*. “

Save the file as a .bat file.

Double-click the batch and make sure you pull down some emails from your inbox.

Point the PHP executable to the location of the *php.ini* file.

The PHP-CGI binary is located in the root folder of the PHP install folder. The PHP-CGI binary for 4.x is named *php.exe*. The PHP-CGI binary for 5.x is named *php-cgi.exe*.

In order to use the dynamic libraries, you will have to point the *php.exe* or the *php-cgi.exe* to the location of the *php.ini* file. This location can vary from system to system. If you do not know the location of the *php.ini* file, run the following command: phpinfo();

The system will display the path to the *php.ini* file that it is using.

For example, if it is located in c:\windows, modify the path to your php.exe binary. as follows:

c:\path\to\PHP4\php.exe -c c:\windows\php.ini -f cron.php

Create a new Scheduled Task through Start -> Control Panel -> Scheduled Tasks -> Add Scheduled Task.

Use the wizard to select the batch file that you just created.

At the next screen, have it perform Daily. Select the defaults as needed and ensure that you check off “Open Advanced Properties for this task when I click finish”.

When the Advanced Properties dialog box opens, click the Schedule tab and then click the Advanced... button.

Check off Repeat task to enable the fields below it, and have it repeat Every Minute or whatever you find appropriate.

Save your changes.

To set up Scheduler Options in Sugar Suite

In the System panel of the Administration Home page, click Scheduler.

The Schedule List page displays.

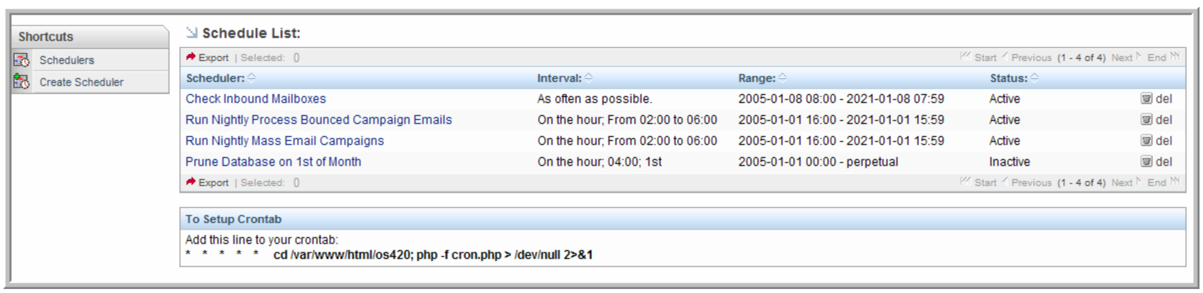


Figure 67: Schedule List

Select any job from the job list to view its settings or the Job log. You can edit, duplicate, or delete the settings.

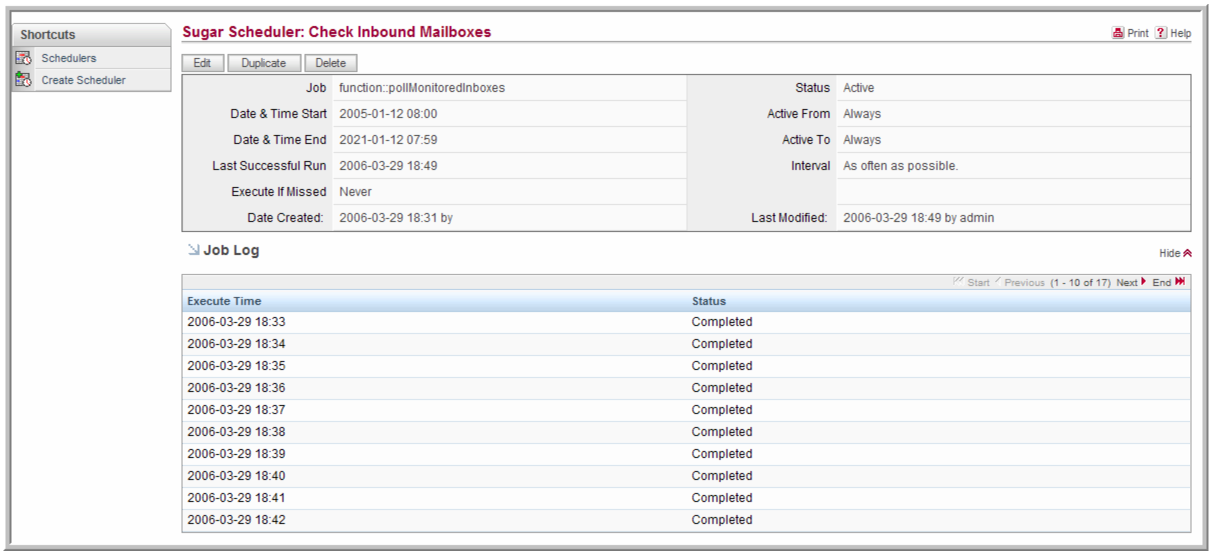


Figure 68: Scheduler Job View

To edit the settings, click Edit.

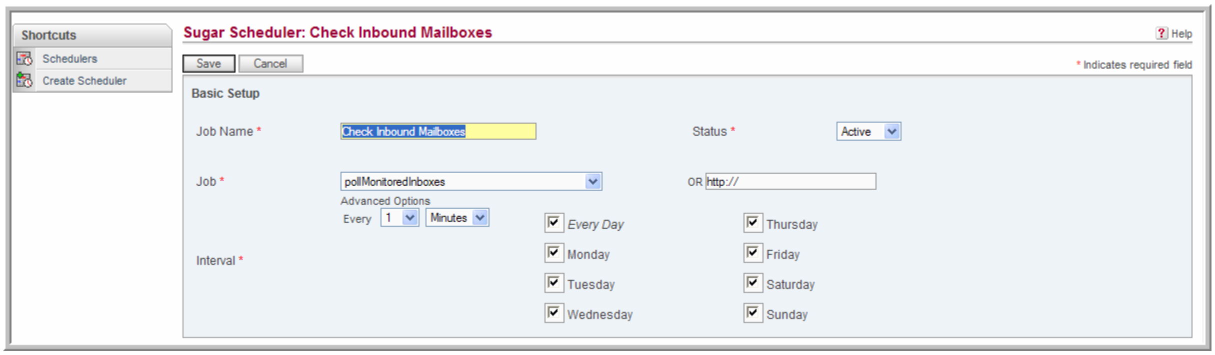


Figure 69: Scheduler Job Edit View

Make the necessary changes to any of the following fields:

Job Name: Enter a name for the job.

Status: Select the job status from the drop-down list, either active or inactive.

Job: Select a job from the drop-down list. The OR field is not used.

Interval: Select the time interval to check for a new scheduled job.

The default is every one minute daily.

Click Save to update the settings; click Cancel to exit the page without saving your changes.

Diagnostic Tool

Use this option to capture system configuration for diagnostics and analysis.

Upgrade Wizard

The Upgrade Wizard provides a quick way to upload and install upgrades to new versions as well as patches to existing versions. These files are provided as .zip files. Before using the Upgrade Wizard, the config.php file for your installation must be writable.

As administrator, you browse to select the .zip file for the upgrade and click Upload. Uploading the file queues the upgrade files for installation although no installation has yet occurred. Then, click Install to install the upgrade files. A list of files displays with checkboxes that you can deselect if you do not want specific files. Click Commit to complete the installation. The Upgrade Wizard automatically unzips and installs the files.

A history of all upgrades that have been queued and installed displays in the list. Select the item to uninstall and click Uninstall. You cannot uninstall upgrades to new versions and patches.

Backups

Use this option to back up the Sugar Suite application files.

Repair

The Repair page includes options to upgrade and rebuild data from a previous version of Sugar Suite into the right form for the current version of the program. The upgrade options include:

- *Opportunities*: Controls how currency fields within Opportunities are upgraded. This is needed to support an internationalized currency capability, which stores the currency type separately from the amount. *Opportunities* contains the following:

  Verify Amounts: Clicking on this button verifies that the values in the currency fields are valid (numeric only), and do not have any currency characters such as US, CDN, in the value portion of the field. Checking *Include Closed Records* will also verify the currency fields of all closed records.

  Fix Amounts: Attempts to fix any invalid amounts as detected above by creating a valid decimal value from the current amount. This procedure will backup any amounts it modifies into a database field called amount_backup.

  > **Warning**: If you perform this function and notice errors, do not perform it again without first restoring from the backup (via *Restore Amounts*, below) as it will most likely overwrite the backup with new invalid data. Checking *Include Closed Records* will also fix the currency fields of all closed records.

  Merge Currencies: Merges multiple currencies into a single currency. If you notice that there are multiple currency records for the same currency, you may choose to merge them together. This will also merge the currencies for all other modules. For example, “US” and “U.S.” would be merged to a single currency.

  Update US Dollar Amounts: Updates the U.S. Dollar amounts for Opportunities based on the current currency rates. This value is used to calculate Graphs and list view currency amounts. This will apply the exchange rates stored in the Sugar Suite system and modify all the US currency field values based upon the current rates. Checking *Include Closed Records* will also update the US dollar amounts of all closed records.

  Restore Amounts: This will undo the *Fix Amounts* processing, by restoring the original value from the backup field.

- *Rebuild Audit*: Checks and rebuilds your audit tables.
- *Rebuild Extensions*: Rebuilds extensions including extended vardefs, language packs, menus, and administration.
- *Repair Database*: Repairs your Sugar database based on values defined in vardefs. This applies to MYSQL databases only.
- *Rebuild Config File*: Rebuilds the config.php by updating the version and adding defaults when not explicitly declared.

- *Rebuild Relationships*: Rebuilds relationship meta data and drops the cache file.
- *Upgrade Custom Labels*: Upgrades the format of the custom field labels in every language file.
- *Clear Chart Data Cache*: Removes cached data files used by charts.
- *Rebuild .htaccess file*: Rebuilds .htaccess to limit access to certain files directly.
- *Apply Daylight Savings Time Fix*: Updates the time handling functionality (MySQL only). This step is mandatory.

Currencies

The Currencies screen is used to define currencies other than the US dollar. For each new currency defined, the name, symbol (e.g. $), exchange rate to the US$, and code (such as CDN for the Canadian dollar) must be entered. Note that each user can select his default currency in the User Management screen.

Note: To display the Euro symbol in charts, you will need to install Macromedia Flash8.

Module Loader

The Module Loader lets you upload custom modules, new language packs, and custom themes so that they are included in the current installation. Custom modules are provided as .zip files. As administrator, you browse to select the .zip file for the module and click Upload. Uploading the file queues the module on the local server for installation. Then, click Install to install the module. The Module Loader automatically unzips and installs the custom module. A history of all modules that have been queued and installed displays in the list. You can also uninstall modules using the Module Loader. Select the module to uninstall and click Uninstall.

Users

Use this section to configure settings for user management and role management.

User Management

User Management is used to create, remove, edit, and activate/deactivate users of the Sugar Suite system.

On this screen, an Administrator can do the following:

- Search for a user
- Edit a user’s profile including change their password
- Duplicate a user profile (see the *My Account* section for more information)
- View a user’s role
- Assign a role to a user

Note that users must have a valid email address to receive email notifications.

The user list also includes Roles that are created through Role Management as well as the Roles assigned to each user.

Role Management

You can define Roles for groups of users to specify which modules the users have access to through the Access Control Lists (ACLs). An example use for a Role is to create different module sets for

Roles named Sales, Marketing, and Support. While the users assigned to the Support Role need access to the Bug Tracker module, the users in the Sales Roles do not. The ACLs allow very granular definitions of Roles based on modules and actions that can be performed on that module.

When modules are not included, the sub-panels related to the module that display on other module pages are also removed.

Access Control Lists (ACLs)

The ACL mechanism governs the actions (read, write, delete, update, import, export) that can be performed on data within modules. Roles are abstract definitions of privileges and have the following characteristics:

- A particular set of privileges can be identified as a Role and assigned to a user.
- Roles take effect when the Role is assigned to a user.
- Users are optionally associated with one or more roles. When multiple roles are associated with a given Sugar user, the more restrictive privilege prevails.
- The SOAP layer is aware of ACL privileges.

Role Management Menu

The following illustrates the Role Management menu with sample Roles:

Figure 70: Role Management Menu

Creating and Managing Roles

Roles consist of a set of privileges which are determined by assigning an action to a module (for example, disabling Access to the Bugs module). All changes to Role based access control (changing role definitions and granting or revoking roles to and from users) takes effect upon new login sessions. In other words, user privileges are calculated upon login until the next new login session.

To create a Role, click the Create Role shortcut, type and name and select the modules to include for the Role and then save the Role. The following describes how to create and assign a Role:

1. Login as the administrator.
2. Select Admin > Role Management.
3. Select Create Role from Shortcuts.
4. Add a new role (for example, a Support Representative) and provide a description.
5. Change the privilege. For example, change the Delete privilege to None for the Accounts module. (Change other privileges as desired.)
6. Save.
7. Assign a user to the Role through the User sub-panel.
8. Alternatively, assign Roles to users via the User Management section.

Assigning Users to Roles

To assign users to a Role, you can view a Role from the Roles list and click the Role to see the modules included in the Role. Under the Users section, click the Select button to display a list of users. You can check the user names that you want to assign to this Role.

Role Definitions

The following actions are available for each module:

- Access
- User Type
- Delete
- Edit
- Export
- Import
- List
- View

Generally speaking, the All, Owner, and None options indicate the following:

All option indicates that the action is allowed.

Owner is the owner of a record. In other words, the record is assigned to that user and only that owner can perform that particular action.

None indicates that the action is not allowed.

Access: Enable/Disable options. Determines access to a module. Enabled is the default. Disabled means that the module does not appear in the Sugar tab bar or shortcut options (located at the bottom of every Sugar page). The module does not appear as sub-panels or as sidebar navigation options. If Disabled is select for a particular module, then the Role cannot perform any actions associated with that module regardless of any other settings.

Delete: All/Owner/None options. Privileges to delete a record. Owner in this context is the Assigned To user associated with the record. If None is selected, the Delete button that appears on detail views is disabled when this condition is met.

Edit: All/Owner/None options. Privileges to edit a record. If None is selected, the effect is that the Edit button is disabled on a detail view. Additionally, the Mass Update function (located at the bottom of list views) will not update records that meet this condition.

Export: All/Owner/None options. Ability to export a record. The red Export link (located at the top of list views) is removed when this privilege is not available to the user.

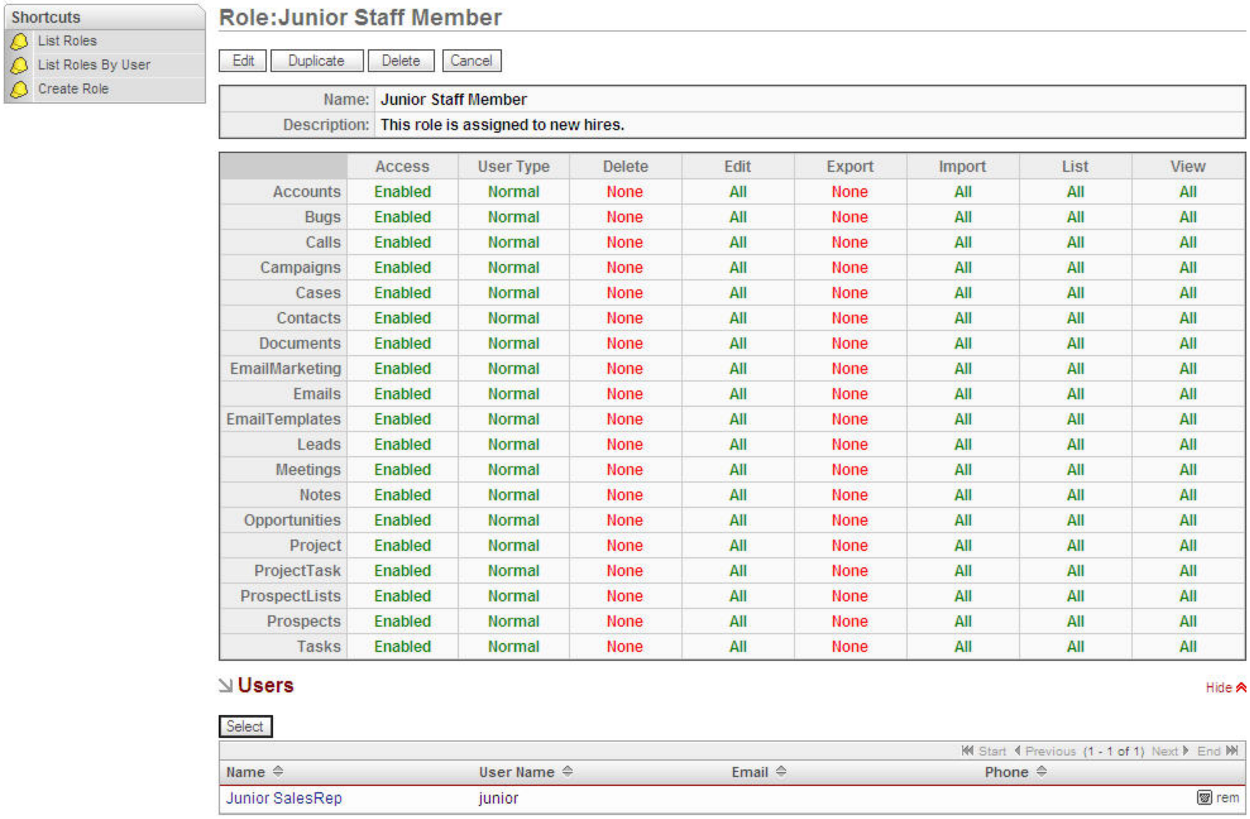
Import: All /None options. Ability to import a record. The Import link in the navigation bar does not appear when this privilege is not available.

List: All/Owner/None options. Determines whether data appears in a list view. The user is unable to access the module's list view when this privilege is not available.

View: All/Owner/None options. Controls access to data that is available in a detail view. Links from list views and sub-panels are disabled when this privilege is not available. Specifically, hyperlink access to the detail view is disabled from the list views, sub-panel link access to the detail view is disabled, and other accesses receive an error message indicating that the user does not have authorization to edit the record.

Example Role: Junior Staff Member

This example Role for a Junior Staff Member restricts delete, export, and import functions are for all modules.



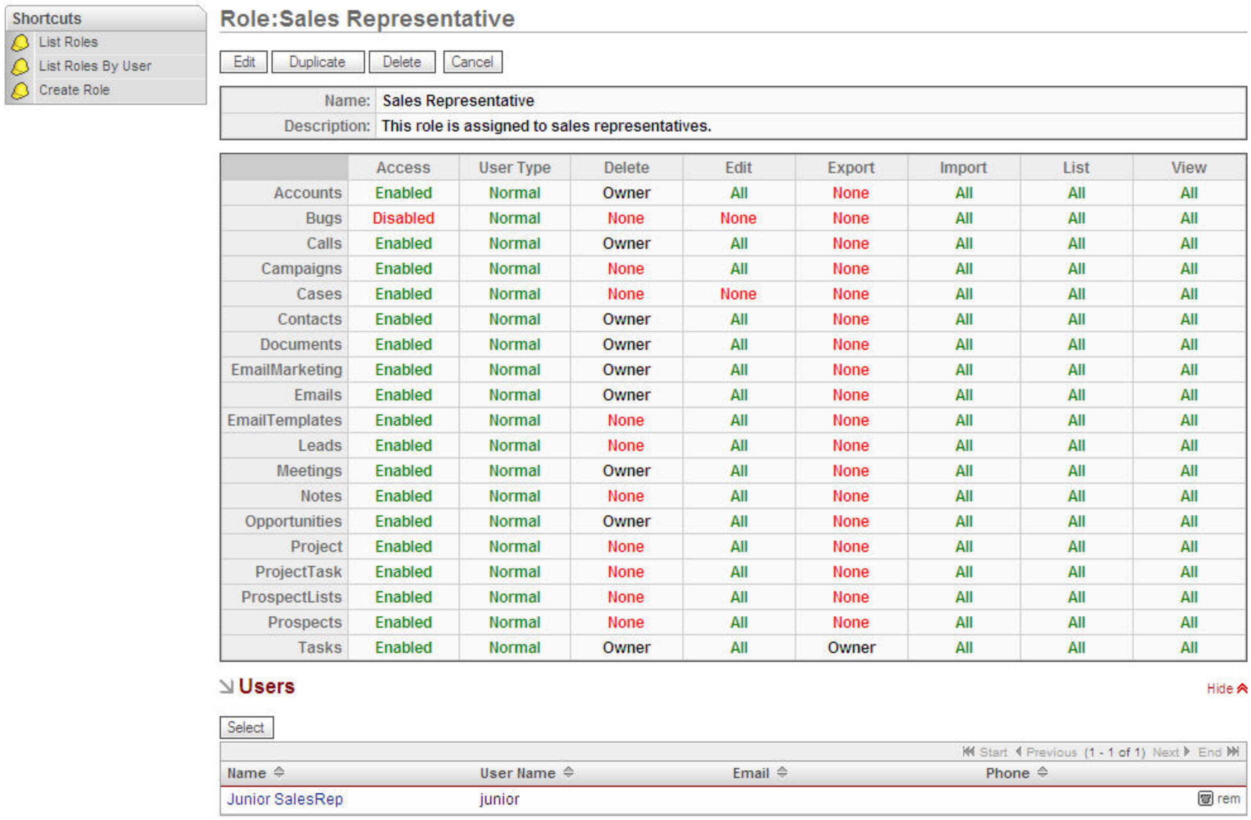
	Access	User Type	Delete	Edit	Export	Import	List	View
Accounts	Enabled	Normal	None	All	None	All	All	All
Bugs	Enabled	Normal	None	All	None	All	All	All
Calls	Enabled	Normal	None	All	None	All	All	All
Campaigns	Enabled	Normal	None	All	None	All	All	All
Cases	Enabled	Normal	None	All	None	All	All	All
Contacts	Enabled	Normal	None	All	None	All	All	All
Documents	Enabled	Normal	None	All	None	All	All	All
EmailMarketing	Enabled	Normal	None	All	None	All	All	All
Emails	Enabled	Normal	None	All	None	All	All	All
EmailTemplates	Enabled	Normal	None	All	None	All	All	All
Leads	Enabled	Normal	None	All	None	All	All	All
Meetings	Enabled	Normal	None	All	None	All	All	All
Notes	Enabled	Normal	None	All	None	All	All	All
Opportunities	Enabled	Normal	None	All	None	All	All	All
Project	Enabled	Normal	None	All	None	All	All	All
ProjectTask	Enabled	Normal	None	All	None	All	All	All
ProspectLists	Enabled	Normal	None	All	None	All	All	All
Prospects	Enabled	Normal	None	All	None	All	All	All
Tasks	Enabled	Normal	None	All	None	All	All	All

Name	User Name	Email	Phone	
Junior SalesRep	junior			rem

Figure 71: Junior Staff Member Example Role

Example Role: Sales Representative

This example Role for a Sales Representative establishes a base set of privileges.



Shortcuts
List Roles
List Roles By User
Create Role

Role:Sales Representative

Edit | Duplicate | Delete | Cancel

Name:	Sales Representative
Description:	This role is assigned to sales representatives.

	Access	User Type	Delete	Edit	Export	Import	List	View
Accounts	Enabled	Normal	Owner	All	None	All	All	All
Bugs	Disabled	Normal	None	None	None	All	All	All
Calls	Enabled	Normal	Owner	All	None	All	All	All
Campaigns	Enabled	Normal	None	All	None	All	All	All
Cases	Enabled	Normal	None	None	None	All	All	All
Contacts	Enabled	Normal	Owner	All	None	All	All	All
Documents	Enabled	Normal	Owner	All	None	All	All	All
EmailMarketing	Enabled	Normal	Owner	All	None	All	All	All
Emails	Enabled	Normal	Owner	All	None	All	All	All
EmailTemplates	Enabled	Normal	None	All	None	All	All	All
Leads	Enabled	Normal	None	All	None	All	All	All
Meetings	Enabled	Normal	Owner	All	None	All	All	All
Notes	Enabled	Normal	None	All	None	All	All	All
Opportunities	Enabled	Normal	Owner	All	None	All	All	All
Project	Enabled	Normal	None	All	None	All	All	All
ProjectTask	Enabled	Normal	None	All	None	All	All	All
ProspectLists	Enabled	Normal	None	All	None	All	All	All
Prospects	Enabled	Normal	None	All	None	All	All	All
Tasks	Enabled	Normal	Owner	All	Owner	All	All	All

Users Hide

Select

Start Previous (1 - 1 of 1) Next End

Name	User Name	Email	Phone	
Junior SalesRep	junior			rem

Figure 72: Sales Representative Example Role

Example Role: Junior Sales Representative

This example demonstrates the privileges granted to a Junior Sales Representative who has multiple roles. By combining the Junior Staff Member example Role with the Sales Representative example Role, a Junior Sales Representative privilege definition is effectively achieved for this user.

This information is viewable via Admin > User Management (Administrator privileges are required). Note that more restrictive privileges supersede less restrictive privileges.

	Access	User Type	Delete	Edit	Export	Import	List	View
Accounts	Enabled	Normal	None	All	None	All	All	All
Bugs	Disabled	Normal	None	None	None	All	All	All
Calls	Enabled	Normal	None	All	None	All	All	All
Campaigns	Enabled	Normal	None	All	None	All	All	All
Cases	Enabled	Normal	None	None	None	All	All	All
Contacts	Enabled	Normal	None	All	None	All	All	All
Documents	Enabled	Normal	None	All	None	All	All	All
EmailMarketing	Enabled	Normal	None	All	None	All	All	All
Emails	Enabled	Normal	None	All	None	All	All	All
EmailTemplates	Enabled	Normal	None	All	None	All	All	All
Leads	Enabled	Normal	None	All	None	All	All	All
Meetings	Enabled	Normal	None	All	None	All	All	All
Notes	Enabled	Normal	None	All	None	All	All	All
Opportunities	Enabled	Normal	None	All	None	All	All	All
Project	Enabled	Normal	None	All	None	All	All	All
ProjectTask	Enabled	Normal	None	All	None	All	All	All
ProspectLists	Enabled	Normal	None	All	None	All	All	All
Prospects	Enabled	Normal	None	All	None	All	All	All
Tasks	Enabled	Normal	None	All	None	All	All	All

Roles Hide

Select

Start Previous (1 - 2 of 2) Next End

Name	Description		
Sales Representative	This role is assigned to sales representatives.	edit	rem
Junior Staff Member	This role is assigned to new hires.	edit	rem

Figure 73: Junior Sales Representative Example Role

Email

Use this section to manage inbound emails, outbound emails, and email campaigns.

Email Settings

Email settings include configuring notification options, the default email format such as HTML or plain text, and the default email client.

For outbound emails, you can configure the maximum number of email per batch for email campaigns, and the location of the campaign tracking file.

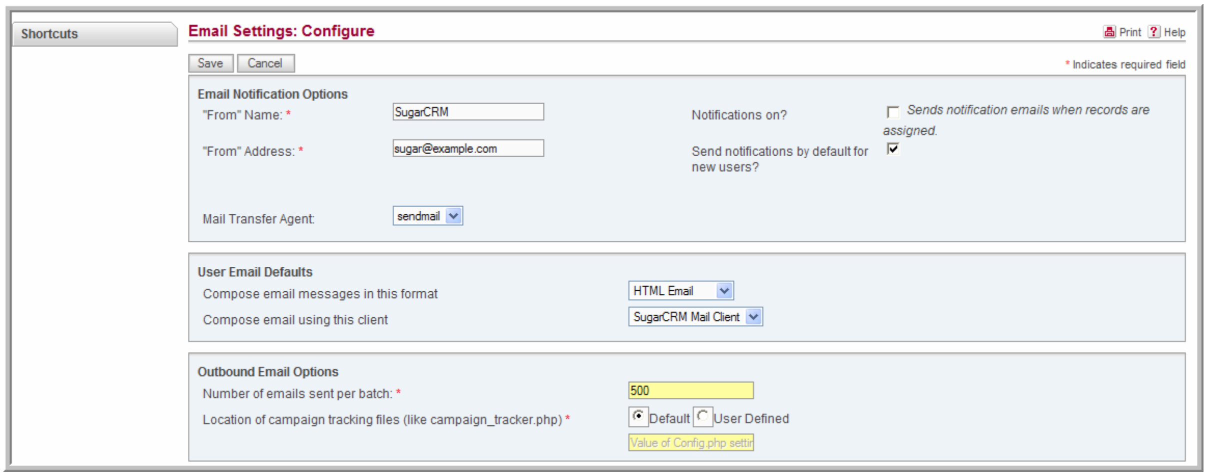


Figure 74: Email Settings page

Inbound Email

This section describes Inbound Email processing. Inbound Email provides the capability to monitor, route, assign, and reply to emails. Multiple mailboxes can be monitored, such as support@support.com or sales@support.com.

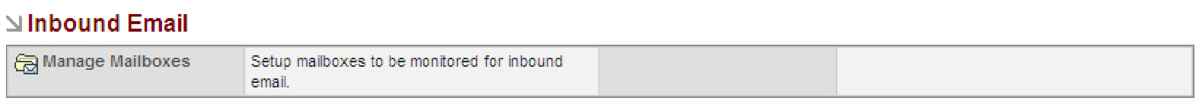


Figure 75: Inbound Email Administration

Items contained in these email boxes can be parsed and associations made to applicable existing Sugar records, such as an email for a given Case ID. Emails that do not reference existing Sugar records can be placed in a Group Inbox and subsequently assigned to users.

You can use the Inbound Email option to:

Retrieve emails from monitored mailboxes and move them to the Group Inbox (which is accessible via the Emails module).

Items in the Group Inbox can be assigned and/or distributed to users and once distributed, the items appear in the user's My Inbox.

Email items residing in the Group Inbox can be assigned to specific individuals or to individuals within teams. With either option, you can distribute the assignment based on two available assignment options: round-robin or least-busy. You can choose to assign single email items or in bulk by using the "Only Checked" and "All Search Results" options.

From My Inbox, a user can create a lead, case, or contact.

Inbound Email processing functionality has been exposed in areas such as the Home Screen with the My Inbox area and are set up for monitoring through Admin > Inbound Email > Monitor New Mailbox.

Manage Mailboxes

The following illustration shows a monitored email inbox in Admin > Inbound Email > All Mailboxes.

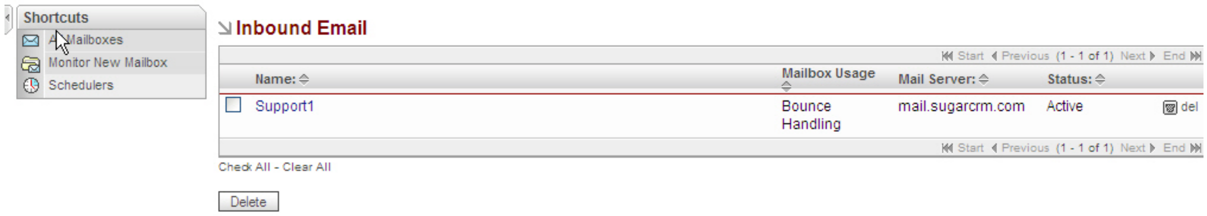


Figure 76: Monitored Email Inboxes

Inbound Email Setup

The following illustration shows the basic Email setup, mail server options, and Email handling options for an Inbox set up with bounce handling. Such an inbox is useful for capturing and reporting on bounced emails arising from an email marketing campaign. See Campaign Management for more information regarding this capability.

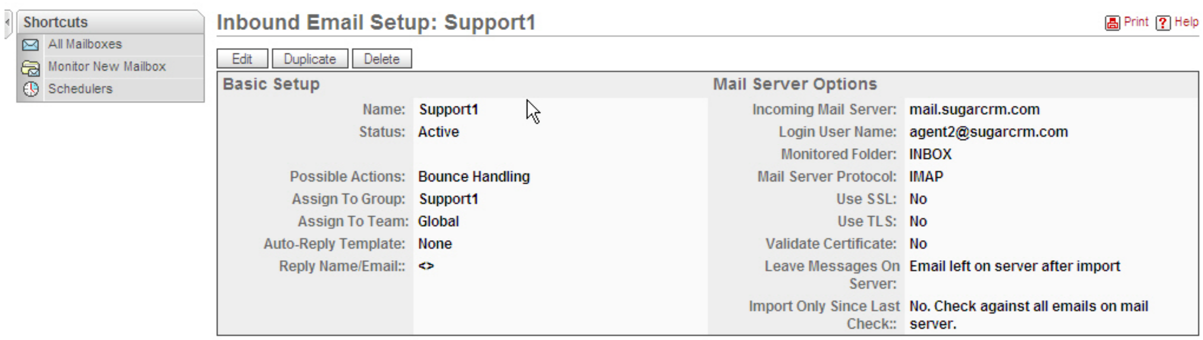


Figure 77: Inbound Email Setup Example

Monitoring New Mailboxes

To manage mailboxes, you need Admin privileges:

1. Login as the administrator.
2. Access Admin > Inbound Email.
3. From Shortcuts, select Monitor New Mailbox.
4. Complete the Basic Setup, Mail Server Options, and Auto-Reply Options configuration.
5. Associate this monitored mailbox with a Group.

   A Group is a special form of User initially assigned ownership of incoming email items. An example, Group is support-user or sales-user. (The Admin > User Management menu contains a checkbox for designating a Group.)

Creating a Case from Email

To create a case from an email that appears in My Inbox (this process also applies to creating a lead or contact):

1. Access My Inbox.
2. Click Create Case. This generates a case with pre-filled data and original email content and then assigns the item to you.
3. Save. When you save, the email item is automatically associated with the case.

From the My Inbox, you can reply to emails and create Sugar record such as cases, leads, and contacts. From the Group Inbox, you can assign emails, reply to emails, and create Sugar records based on email items.

Manage Email Queue

You can manage mass email campaigns that have been created in the Campaigns module. Other users may create email campaigns containing a template email to large numbers of targets. Depending on the send date the user assigns to the emails, the emails then wait in the email queue to be sent on the particular date. You can view processed campaign emails in the Campaigns module.

Manage Email Queue

The Manage Email Queue option displays the queue for outbound campaign emails that have not yet been sent. Emails created using the Email module are not displayed.

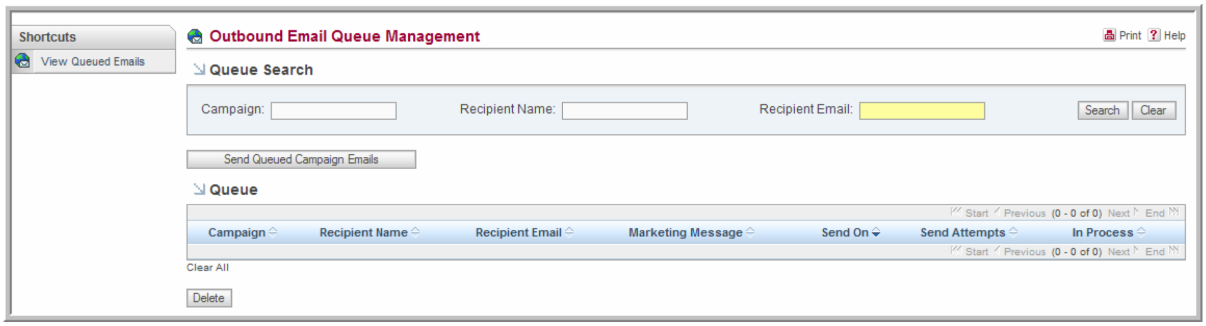


Figure 78: View Queued Emails

As administrator, you can monitor these emails as they are sent. You can also delete emails that are waiting to be sent. You can view information on each email such as Campaign, Recipient Name, Recipient Email, From Name, and so on.

To delete an email that is waiting to be sent:

1. Click the check box next to the email.
2. Click the Delete button.

Once a campaign email has been processed, you can view them from the Campaign module. Statistics such as the send date and number of times an email delivery was attempted are tracked.

Email-Campaign Settings

The Email Settings menu allows you to configure mass email. Specify the number of emails sent per batch and the location of the campaign tracking files. You can set up an inbound email inbox for bounce handling. This is useful for capturing and reporting on bounced emails arising from an email marketing campaign. See Campaign Management for more information regarding this capability.

For email marketing campaigns, you use the Scheduler to run nightly mass email campaigns as well as monitor bounced campaign emails. See the section on Scheduler for more information.

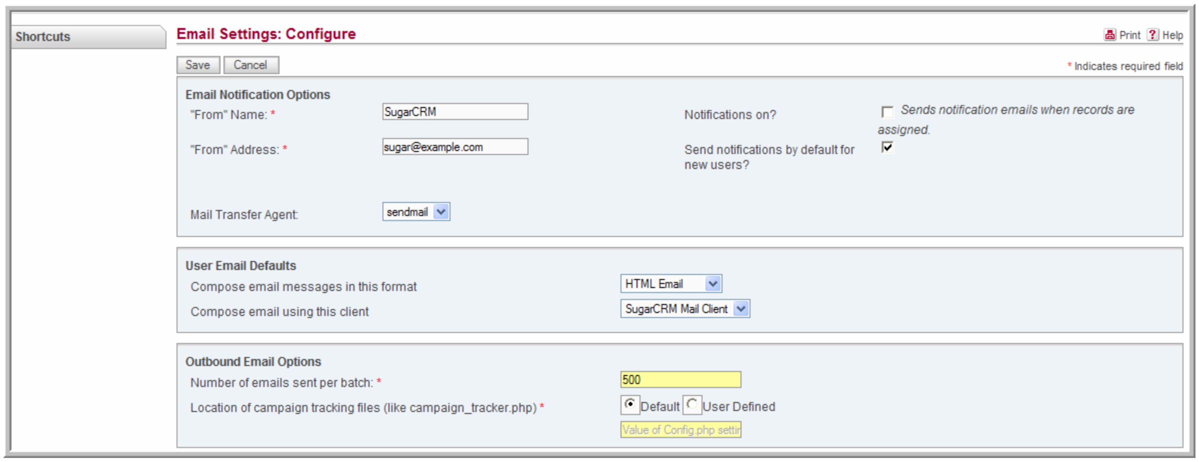


Figure 79: Email-Campaign Settings

Viewing Queued Outbound Marketing Campaign Emails

Use the Manage Email Queue option in the Emails sub-panel to view and send queued outbound campaign emails.

Studio

This section describes the various settings associated with the user interface such as field layout, editing, tab configuration and renaming.

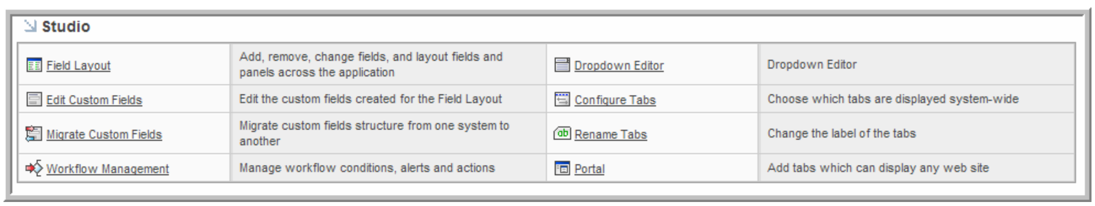


Figure 80: Studio Administration

Field Layout

The Field Layout editor lets you rearrange the fields and panels on the screens available within Sugar Suite, to customize them to fit your needs.

Begin by selecting the name of the file to customize. This can be a specific view from one of the system's modules, such as the list view, detail view, or edit view, or a sub-panel. Choose the file name from the drop-down box provided, and then click on the *Select File* button. If you are not sure what file to edit you can select the *Edit in Place* checkbox; this adds an edit icon to all the editable screens throughout Sugar Suite. Now go to the screen you want to edit, click on the icon, and enter the screen layout editor to customize that screen layout.

Within the field layout function, special shortcuts display in the Shortcuts Box:

Select File: Sends you to the screen first seen when entering the field layout function, to select a file to edit. If you select this shortcut when you are in the middle of editing a screen, edits on that screen are lost if not already saved.

Edit Fields: Within the Layout Editor, *Edit Fields* is a mode that let's you drag and rearrange individual fields or their labels within the details panel. Select the item handle (the little square grey box) next to the field or label you want to move, and then click on the item handle where you want the field or label located. This moves the item from its previous location to its new location. If there was already a field or label at the destination the two items swap positions. *Edit Fields* also lets you move sub-panels. Moving sub-panels is the same as moving fields; select the source sub-panel handle and then click on the destination sub-panel handle, and the two switch locations.

Edit Rows: Within the Layout Editor, *Edit Rows* is a mode that allows the addition and removal of rows in the details panel. Pressing the button adds a row below the one currently selected, and pressing the removes the row currently selected. This feature is named *Edit Columns* in list views.

Edit Labels: Clicking *Edit Labels* displays all the fields used on the page and their labels in the Toolbox in the shortcuts area. The labels are displayed in edit boxes so that you can edit one or more labels at once and then click Save. You can also click on a specific label in the page to view and edit a single label in the Toolbox and then click Save.

The *Toolbox* provides a workspace to add new fields and labels to a screen, to temporarily hold items that have been removed from a screen, and to discard items which are not needed. Its functions include:

Display HTML Code: To test this feature, select this checkbox and then move your cursor around the screen being edited. As the cursor passes over each field or label in the screen you can see the html that comprises it displayed as ‘Alt’ text in a floating box below the cursor. **Note:** While this function can be informative it is very CPU intensive, and should only be used when absolutely necessary.

Add Field: Opens a dialog box which lets you specify the type of field you want to add and its name label. Click on the *Add* button to put your new field and its label in the Toolbox workspace, and close the dialog box. Next, to move your new field from the Toolbox to the screen, select its item handle and then click on the item handle where you want the field located.

Edit Fields: Displays the Edit Custom Fields functionality for creating new fields. Click Save Layout to save your changes before clicking this item. Changes are not saved when you click this item because you are leaving the page.

Staging Area: Drag items to the Staging Area while you are working with them.

Sugar Fields: Lists the fields that are not used in the page. Selecting a field adds it to the Staging Area. You may only drag items out of this area.

Sugar Bin: You can add items from the Sugar Bin to the Staging Area. Items that you left in the Staging Area when you click Save Layout appear in the Sugar Bin the next time you edit this page. You may only drag items out of this area.

To remove a field, select its handle and drag it to the Staging Area. After you remove a field it is listed in the Sugar Bin so that it is easy to locate for later use.

Use the *Save Layout* button to save changes while in the Layout Editor. To discard changes simply choose the *Select File* shortcut to work on another file, or exit the Layout Editor entirely. Remember to un-check the *Edit in Place* checkbox before you leave the field layout function, or all your screens will still have the icon on them.

Edit Custom Fields

You can add custom fields to any module in Sugar Suite. First, select the module in which you want to add or edit custom fields. Then you can define the field using Field Name, Field Label (the label displayed on the module), Data Type, Max Size, Required Field (indicated by asterisks for users), and Default Value.

After saving a new field, you can view and edit information about the field in the Custom Fields list for the module. In Field Layout, you can place the custom field on the module page by dragging it to the new location, just like any other field.

Migrate Custom Fields

You can migrate custom fields by exporting the custom field structure from one server and importing it on another server. Before importing a new custom field structure, it is recommended that you export the current custom field structure as a backup. When you import a custom field structure, details display to describe what changes is made to the database. If you agree with the changes, click the Execute non-simulation mode link. Importing removes any previously defined custom field structures that are not defined in the imported .sugar file as well as any data stored in those custom fields. If you want to revert the import process, import the backup version of the structure you exported.

Dropdown Editor

The Dropdown Editor is a very valuable tool for the Administrator. It permits the values in all of the drop-down boxes in the system to be edited. The options presented to the user may be edited, existing options may be eliminated, and new options may be added. For example, when defining a new Account, in the Account Type field, the user must normally choose from a set of drop-down options, including *Analyst*, *Competitor*, *Customer*, *Integrator*, *Investor*, *Partner*, *Press*, *Target*, *Reseller*, and *Other*. By using the Dropdown Editor, this option set may be altered, with more or less options, and different option values.

To use the Dropdown Editor:

- Select a name of a drop-down list, from the drop-down list of their names (if that is not too confusing a statement). For example, account_type_dom is the second option on this list.
- If you select that option, and then choose the language US English (only those language packs which have been installed on your system is available as choices).
- Click on the *Select* button, you will see a list of the Account Type options as given above.

On each line of the list, you will see a number of controls on the right hand side. The up and down arrows controls allow you to promote or demote an option, to a higher or lower position on the list. The *Edit* and *Del* controls allow you to edit or delete the drop-down options, respectively. The *Ins* control adds a new drop-down option into the list above the item on the line you click on.

Configure Tabs

Both system administrators and users can easily configure which tabs appear at the top of the application. In the Configure Tabs administration option, administrators can define which menu tabs will appear for all users.

Users can then modify their own personal tab settings in the My Account screen. Any tabs that an administrator removes cannot be added back by a user. You can unselect the Allow users to configure tabs check box if you do not want them to make any changes.

Rename Tabs

You can rename and rearrange the tabs that display for all users. In the list of tabs, you can click on the edit controls on the right side of list to move the tab up or down in the order of display. You can also edit the name, delete the tab, or add a new tab to the list. Tabs are identified by a key and a value.

Portal

The Portal Administrative function is used to add new Tabs and Shortcuts to Sugar Suite, which can link to any website you choose. This is commonly used to include email, forums, or any other web-based application, allowing Sugar Suite to become a single interface focus for its users.

Using this administrative option performs a similar function to clicking on the Portal tab to select the Portal module, and indeed takes you to the Portal module. However note that an Administrator will initially see the Portal List screen, but other users will see the Portal home site (a configuration option).

All users have a set of shortcuts allowing them to *Add Site*, *List Sites*, or navigate to any site visible to them. Each user has shortcuts to all sites marked as Global sites, plus any Personal sites they have created.

The Portal List screen may be reached by clicking on the *List Sites* shortcut. For an Administrator, this screen lists all sites - Global sites available to all users, as well all the Personal sites created by individual users for their own specific purposes. If you are not an Administrator, you will not see the Global sites listed on this screen, as you do not have the ability to change any of them.

From the Portal List screen, you can delete one or more Portal sites by selecting the checkbox beside them, and clicking on the *Delete* button below the list of Portal sites. You can also edit a Portal site by clicking on its name, or preview its target website by clicking on the link to its URL.

You can create a new Portal site by clicking on the *Add Site* shortcut.

- When creating a new Portal site, you may enter the name and website for the new Portal site, click to select if it is currently visible or not, and choose if it is Personal (viewable only by you), or Global (viewable by everyone). Note that only Administrators have the option to create Global Portal sites.
- You may also choose to have the new Portal site placed on a new Tab, on a new Shortcut, or both. Note that only Administrators have the option to place a site on a Tab – other users may only create shortcuts.
- On any new Tab created by the Portal function, the Shortcuts Box contains all the same shortcuts as are provided on the Portal Tab.

Bug Tracker

The Releases Administration function is used to maintain the options available in the Release drop-down box displayed when reporting a new bug in the Bug Tracker module.

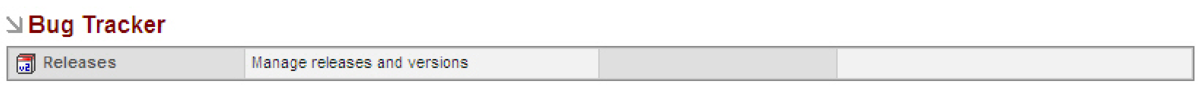


Figure 81: Bug Tracker Administration

Each Release entry consists of a release version, a status (Active or Inactive, where Inactive will remove it from drop down lists) and the order in which it is listed in the Release drop down list.

Sharing Calendar Information in Microsoft Outlook

You can specify settings in Outlook so that the free/busy information from the Outlook calendar for a user is shared with the user's Calendar in Sugar Suite. The settings must be configured on each user's computer.

In Microsoft Outlook, do the following:

1. Select Tools > Options. Then click the Calendar Options button.
2. Click Free/Busy. Select the Publish at my location checkbox and enter the path for the Sugar email account information following the syntax:

   http://servername/sugarcrm/vcal_server.php/type=vfb&source=outlook&email=
   myemail@servername.com

   where 'myemail@servername' is the email address specified for Email Options in the user's My Account page in Sugar Suite. On the My Accounts page in the Calendar Options, the URL for publishing free/busy information is displayed in Your Publish URL.
3. For Search location enter the path for the Outlook account information, such as:

   http://servername/sugarcrm/vcal_server.php/type=vfb&source=outlook&email=%NAME%@%SERVER%

   where %NAME% and %SERVER% are Outlook replacement variables to construct the email address.

Index

SUGAR SUITE ™

Sugar Open Source

User and Administrator Guide

Please send suggestions or corrections to:

support@sugarcrm.com
SugarCRM Inc.

10050 North Wolfe Road, Suite SW2-130

Cupertino, CA 95014

www.sugarcrm.com

SUGARCRM® COMMERCIAL OPEN SOURCE