



Sugar Open Source

User and Administrator Guide

Version 4.0 BETA

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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 4.0. 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

- An 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 to 4.0

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 4.0 of the software, as compared to the previous version.

User Interface Enhancements

Significant user interface enhancements such as a user My Inbox, default values for Probability in Opportunities: Sales Stage dropdown, an Accounts "Copy to Contacts" action, Quick Search feature, number field search, sub-panel Select button popups, and clickable URLs in the description field.

Campaign Management Improvements

Campaign enhancements include a new Schedule button, list management, Email templates at the Prospect List level, Email template creation directly from the Email Marketing screen, and a new Activity View screen for a tracking view of the Campaign.

Access Control List (ACL)

The access control list governs the actions (read, write, update, import, and export) than can be performed on data within modules. ACL allows a set of privileges identified as a Role to be assigned to a user.

Mail Merge Enhancements

Enhancements include allowing identification of MS Word mail merge templates within the Documents Module, performing a mail merge from with Sugar Suite, and performing a Word merge from within MS Word.

Inbound Email Processing

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.

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 ListView or in a report.

Accessing Sugar Suite

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

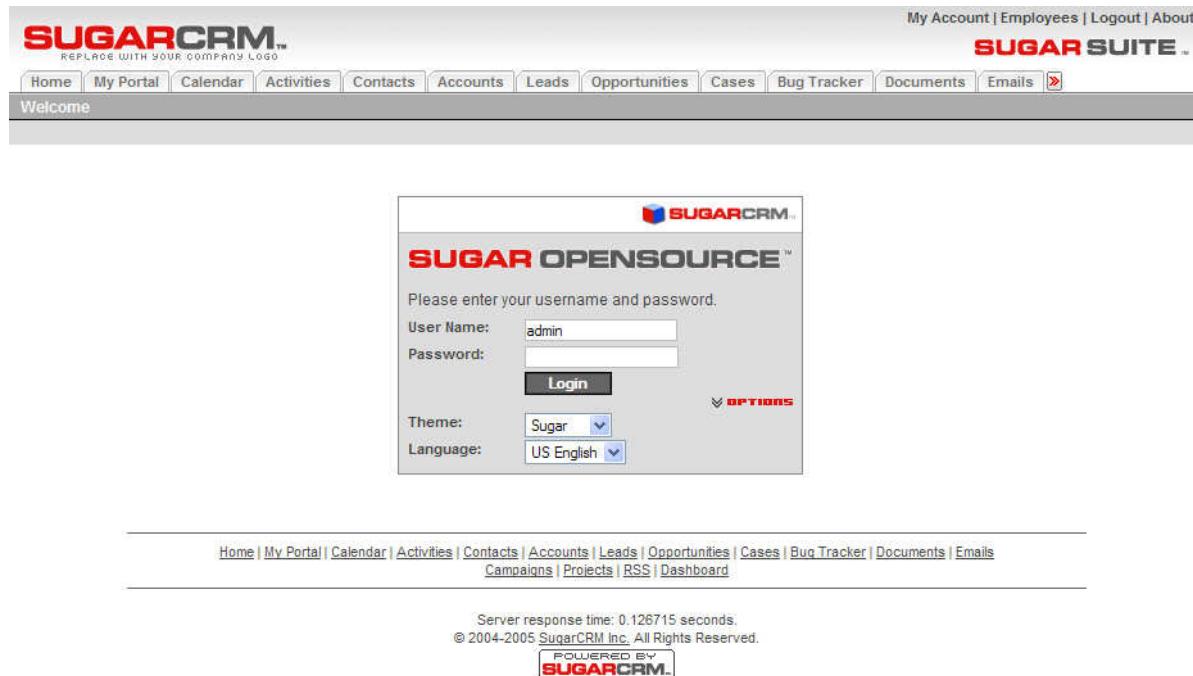


Figure 1: Sugar Open Source Log In Screen

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/>

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.
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.

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.

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.

The screenshot shows the SugarCRM interface for a user named Sally Bronsen. At the top, there's a navigation bar with links like Home, My Portal, Calendar, Activities, Contacts, Accounts, Leads, Opportunities, Cases, Bug Tracker, Documents, Emails, and a search bar. The main title is "Users: Sally Bronsen (sally)". Below the title, there's a "User Settings" section containing various configuration options. Under "User Information", there are fields for Employee Status, Title, Department, Reports to, Email, Other Email, IM Type, IM Name, Address, and Notes. On the right side, there are fields for Office Phone, Mobile, Other, Fax, and Home Phone.

User Settings		
Administrator:	<input type="checkbox"/> Grants administrator privileges to this user	
Portal Only User:	<input type="checkbox"/> The user is a portal user and cannot login through the SugarCRM web interface. This user is only used for portal webservices. Normal users cannot be used for portal webservices.	
Assignment Notification:	<input type="checkbox"/> Receive an e-mail notification when a record is assigned to you.	
Date Format:	2006-12-23	Set the display format for date stamps
Time Format:	23:00	Set the display format for time stamps
Current Time:	2005-04-28 19:12	
Show Gridlines:	<input type="checkbox"/> Controls gridlines on detail views	
Currency:	U.S. Dollar : \$	Select the default currency
Default Reminder:	<input type="checkbox"/> Default time to remind a person of an upcoming call or meeting	

User Information	
Employee Status:	
Title:	Senior Account Rep
Department:	
Reports to:	Sarah Smith
Email:	
Other Email:	
IM Type:	
IM Name:	
Address:	
Notes:	
Office Phone:	
Mobile:	
Other:	
Fax:	
Home Phone:	

Figure 2: My Account Screen

User Interface

When you log into the system, the Home tab 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 ListView. 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.

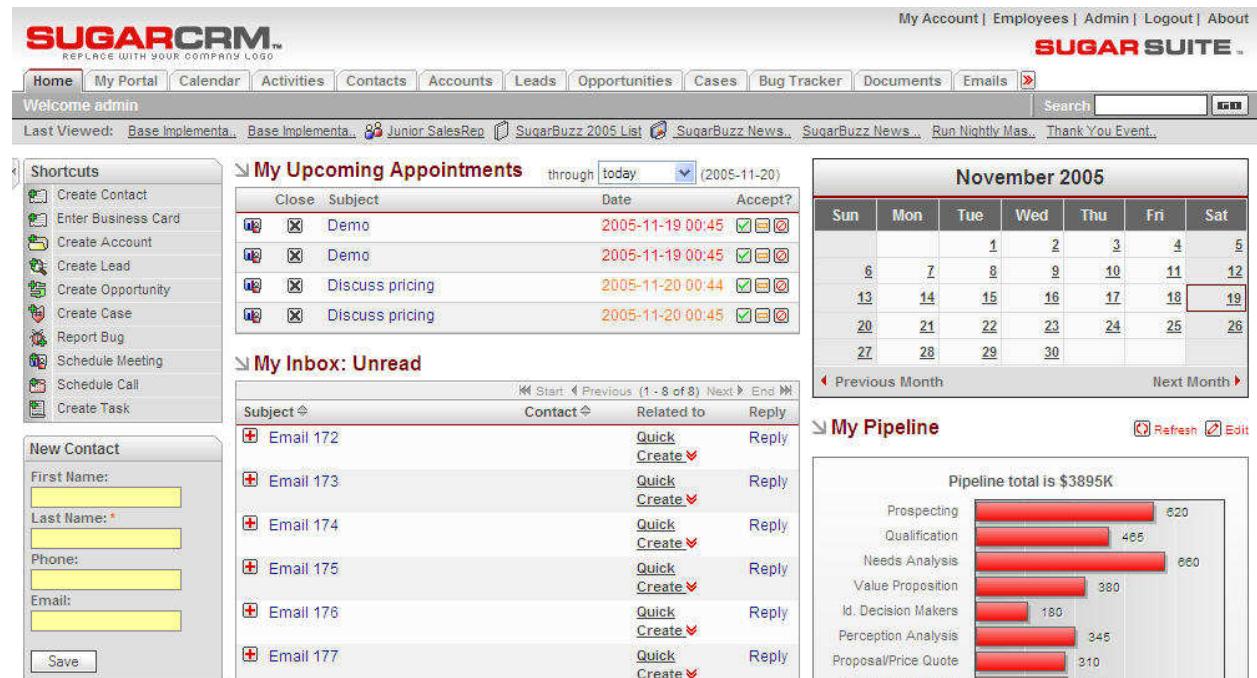


Figure 3: Home Screen

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.

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**

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.

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 Prospects 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 list 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.

ListView 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 ListView 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.

ListView searches

When working with the ListView, 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 to it in EditView, for example, Assign To fields.

DetailView Screen

From a module’s ListView, clicking on any entry in the list displays the DetailView for that item – for example the full details of a contact, or an account. This DetailView shows more information than the ListView 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 DetailView 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 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:

The screenshot shows the 'Accounts: Home' screen. On the left, there's a sidebar with 'Shortcuts' (Create Account, Accounts, Import), 'New Account' (Account Name: * [input], Phone: [input], Website: http:// [input], Save button), and a 'Print' and 'Help' icon at the top right. The main area has a title 'Account Search' with fields for Account Name, City, Website, and Phone, along with 'Search' and 'Clear' buttons. Below it is a section titled 'Account List' with a table of accounts. A data popup is open over the row for '360 Vacations'. The popup header says '360 Vacations' and includes 'Additional Details' with a close button. It lists the address: '587321 West Siam St, San Mateo, CA 52348 USA', industry: 'Banking', website: 'www.360vacations.com', and a note: 'A B Drivers Limited'. The table below shows 18 more accounts, each with a checkbox and columns for Account Name, City, Phone, and User.

Account Name	City	Phone	User
2 Big Consolidation Corp	St. Petersburg, NY	(891) 773-9152	admin
2 Tall Stores	Denver, CA	(056) 232-7029	admin
24/7 Couriers	St. Petersburg, CA	(965) 845-2149	admin
360 Vacations	San Mateo, CA	(929) 845-9529	admin
3 Additional Details	Ohio, NY	(036) 949-3460	admin
Billing Address: 587321 West Siam St San Mateo, CA 52348 USA	Persistance, CA	(633) 861-3868	admin
Industry: Banking www.360vacations.com	Denver, CA	(302) 944-1720	admin
A B Drivers Limited	Sunnyvale, NY	(458) 445-8202	admin
A B Hammer Group Inc	Denver, CA	(449) 855-4082	admin
A.D. Arts & Crafts Inc	St. Petersburg, CA	(418) 553-7948	admin
A.D. Importing Company Inc	Salt Lake City, NY	(142) 044-4187	admin
A.G. Parr PLC	Cupertino, CA	(078) 930-7525	admin
A/Z Co Ltd	Denver, CA	(138) 609-7999	admin

Figure 4: Sub-panel Data 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.

The screenshot shows the SugarCRM 'My Account' screen for the user 'Will Westin (will)'. The interface is organized into several sections:

- User Settings:** Includes fields for First Name (Will), Last Name (Westin), User Name (will), and various configuration options like Date Format (2006-12-23), Time Format (23:00), and Currency (U.S. Dollar : \$).
- User Information:** Includes fields for Employee Status (Active), Title (Sales Manager Eas), Department, Reports to (Jim Brennan), Email, Other Email, IM Type (MSN), IM Name, and Notes.
- Address Information:** Includes fields for Primary Address, City, State, and Country.

Figure 5: My Account Screen

To edit the user profile, and change user preferences, click on the Edit button. This 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.

User Information

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

Email options contains 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.

In addition, you can view and change the mail transfer agent, server set up by the system administrator, 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 may be listed on the screen, 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 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 ListView. 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 ListView is selected using the My Portal navigation tab:

The screenshot shows the Sugar Suite interface with the 'My Portal' tab selected in the top navigation bar. The main content area displays the 'BusinessWeek online' portal. On the left, there's a sidebar titled 'Shortcuts' containing links to 'Forbes Magazine', 'BusinessWeek', 'Google', 'Add Site', and 'List Sites'. The main content area features the BusinessWeek logo and various news articles. A sidebar on the right provides 'MARKET INFO' with stock market data for DJIA, S&P 500, and Nasdaq, along with a 'STOCK LOOKUP' button. At the bottom right, there's a red button labeled 'REPLAY MOVIE'.

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. You can also edit a Portal site by clicking 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: User can add their favorite website or work related website directly into the SugarCRM application. Name is what they want to call their website. Website text box is the area where you enter the URL of the website. The placement drop down menu gives the user the option of 1: tab and shortcut means the website link shows up on the shortcut and tab on the top 2: tab menu, it shows up on the tab only 3: shortcut menu, it shows up on the shortcut bar only. If the visible checkbox is checked it means the link shows up at the places according to placement option. Type dropdown menu determines who get the link to the websites on the application.

The screenshot shows the 'Portal: Home' edit view for adding a new site. On the left is a sidebar with 'Shortcuts', 'Add Site', and 'List Sites'. The main area has a 'Save' and 'Cancel' button at the top. Below are fields: 'Name:' (with a red asterisk), 'Website:' (with a red asterisk), 'Placement:' (dropdown set to 'Tab Menu and Shortcut Menu'), 'Visible:' (checkbox checked), and 'Type:' (dropdown set to 'Personal'). At the bottom right are 'Print', '?', and 'Help' buttons.

Figure 7: My Portal Module (Add Site EditView)

Calendar Module

The Calendar Module ListView is selected using the Calendar navigation tab:

Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
18		1 Planned: Review needs	2	3	4	5	6	
19		8	9 Planned: Follow-up on proposal	10 Planned: Follow-up on proposal	11 Planned: Review needs	12	13 Held: Introduce all players	14
20		15 Due: Send contract	16	17	18 Held: Introduce all players	19	20	21
21		22	23	24	25 Not Held: Introduce all players	26	27	28
22		29 Held: Introduce all players	30	31				

Figure 8: Calendar Module (Month 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.

Status	Subject	Due Date
In Progress	Send contract	2005-05-15 14:17
Pending Input	Send a follow-up letter	2005-07-02 14:17
Deferred	Assemble catalogs	2005-09-12 14:18
Pending Input	Send literature	2005-09-25 14:18
Deferred	Assemble catalogs	2005-09-30 14:17
Deferred	Make travel arrangements	2005-11-26 14:17
Pending Input	Send contract	2005-12-14 14:17
Completed	Send a follow-up letter	2006-01-22 14:17
Completed	Send a follow-up letter	2006-03-19 14:17

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 EditView 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 EditView)

Navigation Shortcut – Calls: The Calls shortcut takes you to the call DetailView page. One 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 the user has permission to see. By clicking on the subject link it takes you to the call's detail page.

Figure 12: Calendar Module (Calls ListView)

Navigation Shortcut - Meetings: The Meetings DetailView is similar to Calls DetailView page. User can search for a meeting with subject or contact name. This window also shows the list of meeting that the user has permission to see.

Meetings: Home

Meeting Search

Subject: [] Contact: [] Only my items: [] [Search](#) [Clear](#)

Meeting List

	Contact	Related to	Start Date	Team	User
<input checked="" type="checkbox"/> Close	Subject		2005-11-02	(admin)	admin
<input checked="" type="checkbox"/>	Introduce all players	John User	2005-11-25	(admin)	admin
<input checked="" type="checkbox"/>	Discuss Pricing				

Create Appointment

Schedule Call
Schedule Meeting
Create Task
Create Note or Attachment
Archive Email
Calls
Meetings
Tasks
Notes
Emails
Today

Subject: *
Start Date: * (yyyy-mm-dd)
2005-11-02
Start Time: * (23:00)
17:30
[Save](#)

Figure 13: Calendar Module (Meetings ListView)

Activities Module

The Activities Module ListView is selected using the Activities navigation tab:

Close	Subject	Contact	Related to	Due Date	User
<input type="checkbox"/>	Send a follow-up letter	Xavier Terwilliger	Calm C Sailing 669589	2006-03-03 14:17	sally
<input type="checkbox"/>	Send contract	Fausto Mandujano	NW Bridge Construction 333900	2006-01-22 14:17	sarah
<input checked="" type="checkbox"/>	Assemble catalogs	Althea Cutler	Calm C Sailing 669589	2006-01-13 14:17	sally
<input checked="" type="checkbox"/>	Send literature	Ellsworth Benford	Tri-State Medical Corp 730420	2005-11-27 14:18	sarah
<input type="checkbox"/>	Assemble catalogs	Chadwick Foss	Do-Over Investing 115924	2005-11-13 14:17	sally
<input type="checkbox"/>	Send a follow-up letter	Ramon Lade	UNION G H MISS 348398	2005-05-01 14:18	sarah
<input checked="" type="checkbox"/>	Send a follow-up letter	Richard Provenzano	TRACKER COM LP 954604	2005-04-27 14:17	max
<input type="checkbox"/>	Send contract	Cora Vella	Kaos Theory Ltd 782785	2005-04-27 14:17	sally

Figure 14: Activities Module (Task ListView)

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 ListViews for Calls, Meetings, Tasks, Notes or Emails, using the navigation shortcuts box. Each of the ListViews 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 ListViews provides powerful linking capabilities to related information. The Task ListView, 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 DetailView page. One 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 the user has permission to see. By clicking on the subject link it takes you to the call's detail page.

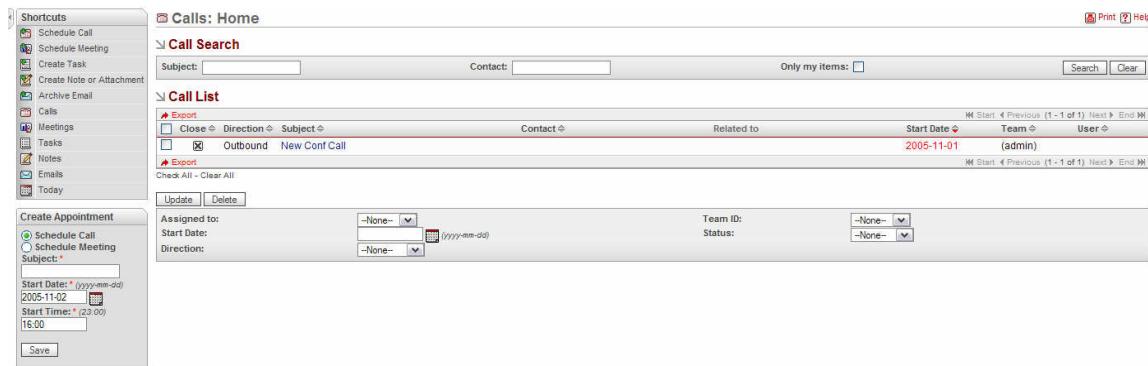


Figure 15: Activities Module (Calls ListView)

Navigation Shortcut – Schedule Call: The Schedule Call EditView 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.

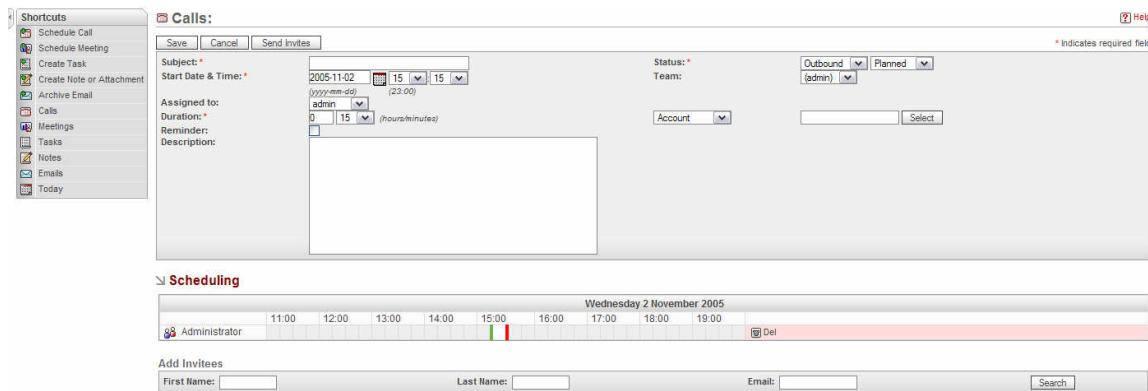


Figure 16: Activities Module (Schedule Call EditView)

Navigation Shortcut - Meetings: The Meetings DetailView is similar to Calls DetailView page. User can search for a meeting with subject or contact name. This window also shows the list of meeting that the user has permission to see.

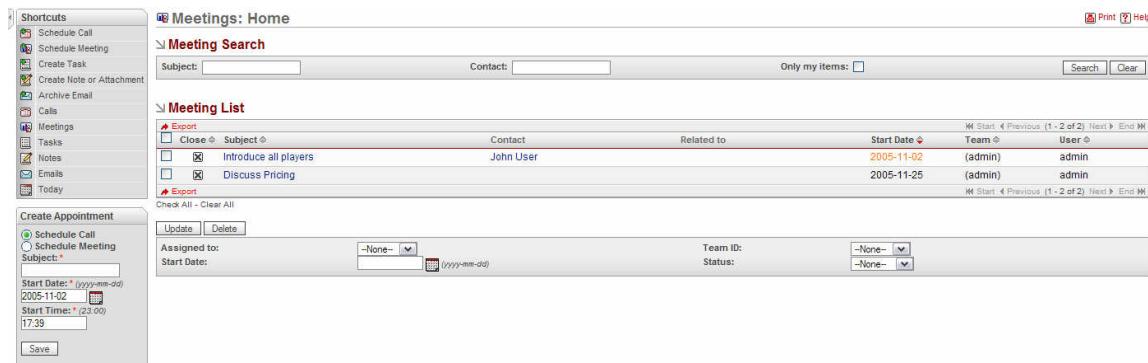


Figure 17: Activities Module (Meetings ListView)

Navigation Shortcut – Tasks: The Tasks home view gives a list of tasks that are associated with the user's view permission. The user 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 with either by task name or contact name.

The screenshot shows the 'Tasks: Home' view. On the left is a sidebar with 'Shortcuts' for Schedule Call, Schedule Meeting, Create Task, Create Note or Attachment, Archive Email, Calls, Meetings, Tasks, Notes, Emails, and Today. The main area has a 'Task Search' panel with fields for Name and Contact Name, and checkboxes for 'Only my items' and 'Search'. Below is a 'Task List' table with the following data:

Subject	Contact	Related to	Due Date	Team	User
Add to mailing list	Elizabeth Drucker	2 Big Consolidation Corp 123759	2006-01-15 17:36	East	will
Arrange introduction	Tessa Lehmann	RRR Advertising Inc 536626	2006-06-23 17:33	East	will
Arrange introduction	Richard Corlew	Green Tractor Group Limited 282370	2006-09-17 17:33	West	max
Arrange introduction	Cecilia Longo	S Cane Sweeteners Ltd 543211	2006-10-10 17:33	West	sally
Arrange introduction	Rachael Jessie	MTM Investment Bank F S B 577995	2006-05-02 17:33	West	sarah
Arrange introduction	Nicholas Lustig	White Cross Co 267079	2006-06-28 17:34	West	max
Arrange introduction	Georgia Stead	2 Tall Stores 11981	2006-07-09 17:37	West	sally
Arrange introduction	Noah Kelt	2 Tall Stores 11981	2005-12-24 17:33	West	sally
Arrange introduction	Shayne Drayton	MTM Investment Bank F S B 726897	2006-05-04 17:33	West	max
Arrange reference call	Delmar Kujawski	Trait Institute Inc 157038	2006-04-26 17:36	West	max
Call to schedule meeting	Merlin Marlin	2 Big Consolidation Corp 123759	2006-10-15 17:35	East	will
Make travel arrangements	Jame Behling	B.C. Reporting Ltd 703396	2005-11-30 17:34	West	max
Make travel arrangements	Effie Hardwick	B.H. Edwards Inc 829278	2006-06-12 17:34	East	will
Make travel arrangements	Leslie Mattice	A.G. Parr PLC 17019	2006-06-14 17:33	East	will
Make travel arrangements	Norma Walt	JJ Resources Inc 603500	2006-05-25 17:33	West	sally
Schedule training	Napoleon Power	JAB Funds Ltd 520307	2006-10-29 17:33	East	will
Schedule training	King Hinshaw	K Kringle Inc/A. Tower & Co 704477	2006-09-22 17:33	East	will
Schedule training	Gregorio Schanz	OTC Holdings 885688	2006-06-29 17:37	East	will
Schedule training	Forest Varney	Air Geese 282214	2006-08-04 17:35	West	sally
Schedule training	Gil Alger	A/Z Co Ltd 822462	2006-02-02 17:37	East	chris

At the bottom are buttons for 'Check All - Clear All', 'Update', and 'Delete'.

Figure 18: Activities Module (Tasks ListView)

Navigation Shortcut - Create Task: The Create Task EditView provides a window where you can add new task to the current tasks list. Subject, Status, and Priority are the required fields and the information need to 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.

The screenshot shows the 'Tasks' edit view. On the left is a sidebar with 'Shortcuts' for Schedule Call, Schedule Meeting, Create Task, Create Note or Attachment, Archive Email, Calls, Meetings, Tasks, Notes, Emails, and Today. The main form has fields for Subject, Due Date & Time (with two date/time pickers), Status (Account dropdown), Priority (Medium dropdown), Team (admin dropdown), Assigned to (admin dropdown), and Description (text area). A note at the top right says '* Indicates required field'.

Figure 19: Activities Module (Create Task EditView)

Navigation Shortcut – Notes: The Notes home view page displays the list of notes that is in the system. The user 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. The user can mass update the target notes by first selecting the notes through the checkbox. Then using the update panel they can mass update the notes' team ID, contact or the selection from the drop down menu.

This screenshot shows the Notes ListView in the Activities module. It includes a left sidebar with shortcuts for Schedule Call, Schedule Meeting, Create Task, Create Note or Attachment, Archive Email, Calls, Meetings, Tasks, Notes, Emails, Today, and Import Notes. The main area has sections for Note Search (Subject, Contact, Search, Clear), Note List (with Export and Last Modified filters), and a toolbar with Start, Previous, Next, and End buttons. Below the list are buttons for Update, Delete, and a note about Check All - Clear All. At the bottom are fields for Team ID, Contact, Account, and a Select button.

Figure 20: Activities Module (Notes ListView)

Navigation Shortcut – Create note or attachment: You can add notes and attachment by using this panel. Subject field is the required field therefore information needs to be entered in this field before the application is able to save note. One 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 gives the user a quicker way to populate the related information according to which option is picked.

This screenshot shows the Create Note or Attachment EditView. It features a left sidebar with the same set of shortcuts as Figure 20. The main form has fields for Contact, Team (dropdown with (admin) selected), Subject (marked as required with a red asterisk), Attachment (with a Browse... button), and Note (a large text area). A note at the top right indicates that the asterisk (*) indicates required fields.

Figure 21: Activities Module (Create Note or Attachment EditView)

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.

This screenshot shows the Import Step 1: Select the Source screen. It includes a left sidebar with the standard set of shortcuts. The main area asks 'What is the data source?' with three options: Salesforce.com (selected with a green radio button), Custom Comma Delimited File, and Custom Tab Delimited File. A Next > button is located at the bottom right.

Figure 22: Activities Module (Import Notes EditView)

Contacts Module

The following Contacts Module ListView is selected using the Contacts navigation tab:

The screenshot shows the SugarCRM Contacts module. At the top, there's a navigation bar with links for Home, My Portal, Calendar, Activities, Contacts (which is highlighted in red), Accounts, Leads, Opportunities, Cases, Bug Tracker, Documents, Emails, and a search bar. Below the navigation is a welcome message "Welcome Jim" and a "Last Viewed" section showing "Status Meeting" and "Tall Stores". On the left, there's a sidebar with "Shortcuts" (Create Contact, Enter Business Card, Create From vCard, Contacts, Import) and a "New Contact" form with fields for First Name, Last Name, Phone, Email, and a "Save" button. The main area is titled "Contact Search" with search fields for First Name, Last Name, Account Name, and checkboxes for "Only my items" and "Advanced". Below that is the "Contact List" with a table of contacts. The table has columns for Name, Title, Account Name, Phone, and User. Each contact row has a checkbox at the beginning. The contact list includes names like Sophie Abbott, Juliette Acevedo, Shelby Acosta, Kathleen Adams, Adrienne Adkins, Verna Aguilar, Kris Aguirre, Josefa Albert, Diana Alexander, Madelyn Alford, Shirley Allen, Nettie Allison, Rosanne Alston, Desiree Alvarado, Charlene Alvarez, Lisa Anderson, Ida Andrews, Chris Anthony, Melanie Armstrong, and Beatrice Arnold, along with their respective titles, account names, phone numbers, and users. At the bottom of the contact list, there are buttons for "Update" and "Delete", and dropdown menus for "Assigned to:" and "Account Name:".

	Name	Title	Account Name	Phone	User
<input type="checkbox"/>	Sophie Abbott	VP Sales	International Art Inc	(340) 667-9191	admin
<input type="checkbox"/>	Juliette Acevedo	VP Operations	Overhead & Underfoot Ltd.	(665) 565-6525	admin
<input type="checkbox"/>	Shelby Acosta	Mgr Operations	EEE Endowments LTD	(514) 163-6468	admin
<input type="checkbox"/>	Kathleen Adams	VP Operations	A 99 Capital Inc	(144) 312-8313	admin
<input type="checkbox"/>	Adrienne Adkins	Mgr Operations	P Piper & Sons	(451) 849-5761	admin
<input type="checkbox"/>	Verna Aguilar	Director Operations	Overhead & Underfoot Ltd.	(267) 014-6293	admin
<input type="checkbox"/>	Kris Aguirre		RRR Advertising Inc.	(294) 280-7708	admin
<input type="checkbox"/>	Josefa Albert	Director Operations	Air Geese	(636) 552-8237	admin
<input type="checkbox"/>	Diana Alexander	VP Operations	Trait Institute Inc	(336) 020-6021	admin
<input type="checkbox"/>	Madelyn Alford	Mgr Operations	S Cane Sweeteners Ltd	(383) 830-1542	admin
<input type="checkbox"/>	Shirley Allen	IT Developer	A/Z Co Ltd	(948) 094-9247	admin
<input type="checkbox"/>	Nettie Allison	President	Max Holdings Ltd	(922) 087-9007	admin
<input type="checkbox"/>	Rosanne Alston	Mgr Operations	A/Z Co Ltd	(137) 770-7824	admin
<input type="checkbox"/>	Desiree Alvarado	VP Sales	B Cool Net Ltd	(765) 610-6744	admin
<input type="checkbox"/>	Charlene Alvarez	Director Operations	Do-Over Investing	(710) 714-4772	admin
<input type="checkbox"/>	Lisa Anderson	IT Developer	24/7 Couriers	(957) 556-1920	admin
<input type="checkbox"/>	Ida Andrews	IT Developer	First National S/B	(611) 122-5069	admin
<input type="checkbox"/>	Chris Anthony	President	ABC FUEL CO	(812) 673-3355	admin
<input type="checkbox"/>	Melanie Armstrong	Director Sales	Trait Institute Inc	(562) 389-2453	admin
<input type="checkbox"/>	Beatrice Arnold	VP Operations	A B Drivers Limited	(895) 035-1613	admin

Figure 23: 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 ListView 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 or by importing the information from a vCard, or switch back to the Contact ListView. As well, an Import facility is provided, to import bulk contact data from Salesforce.com, Outlook, ACT!, or other applications.

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

The screenshot shows the 'Contacts' module's 'Create Contact EditView'. It includes a sidebar with 'Shortcuts' for creating contacts, business cards, or importing from vCards. The main form has several sections: 'Contact Information' (First Name, Last Name*, Account Name, Lead Source, Title, Department, Birthdate, Reports To, Sync Contact, Do Not Call, Team, Assigned to), 'Address Information' (Primary Address, City, State, Postal Code, Country, Other Address, City, State, Postal Code, Country), 'Description Information' (Description), and 'Portal Information' (Portal Name, Portal Active). Buttons for Save, Cancel, and Help are at the top right, with a note that asterisks indicate required fields.

Figure 24: Contacts Module (Create Contact EditView)

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

The screenshot shows the 'Contacts: Business Card' edit view. It includes a 'Create Contact' section with dropdowns for First Name, Last Name, and Title, and text input fields for Department, Primary Address, City, State, Postal Code, Country, Office Phone, Mobile, Email, Other Email, Description, Fax, Other Phone, Home, and Lead Source. A 'Related Records' section allows selecting an account or creating a new one, and a 'Create Note' button. A 'Save' button is located at the bottom right.

Figure 25: Contacts Module (Enter Business Card EditView)

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

The screenshot shows the 'Contacts Import vCard' edit view. It includes a 'Select Account' dropdown with 'Select' and 'Clear' buttons, and checkboxes for 'Create Account', 'Create Opportunity', and 'Create Appointment'. A 'Save' button is located at the bottom right.

Figure 26: Contacts Module (Create from vCard EditView)

Navigation Shortcut – Import Contacts: The user 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.

The screenshot shows the 'Import Step 1: Select the Source' screen. It lists the data sources: Salesforce.com (selected), Microsoft Outlook, Act 2005, Custom Comma Delimited File, and Custom Tab Delimited File. A 'Next >' button is located at the bottom right.

Figure 27: Contacts Module (Import EditView)

Accounts Module

The Accounts Module ListView is selected using the Accounts navigation tab:

The screenshot shows the SugarCRM interface for the Accounts module. At the top, there's a navigation bar with links for Home, My Portal, Calendar, Activities, Contacts, Accounts (which is the active tab), Leads, Opportunities, Cases, Bug Tracker, Documents, Emails, and a search bar. Below the navigation is a welcome message "Welcome Sarah" and a note "Last Viewed: none". On the left, there's a sidebar with "Shortcuts" (Create Account, Accounts, Account Reports, Import) and a "New Account" form with fields for Account Name, Phone, and Website, and a "Save" button. The main content area is titled "Accounts: Home" and contains a "Account Search" section with fields for Account Name, City, Website, and Phone, along with "Search" and "Clear" buttons. Below that is a "Account List" section with a table of account records. The table has columns for Account Name, City, Phone, and User. Each row in the table represents an account with a checkmark checkbox on the left. The table includes pagination controls at the bottom: "Start", "Previous", "(1 - 20 of 100)", "Next", and "End".

Account Name	City	Phone	User
3rd Round Funding 140778	Los Angeles, CA	(267) 419-2535	sarah
5D Invest A/S 518967	Ohio, CA	(841) 960-3478	sally
A B Drivers Limited 216892	San Francisco, CA	(481) 111-4148	sally
A B Hammer Group Inc 111352	Ohio, CA	(060) 704-7656	max
A.D. Arts & Crafts Inc 287443	San Mateo, CA	(139) 637-5180	sarah
A/Z Co Ltd 467131	Denver, CA	(390) 839-9233	max
A/Z Co Ltd 629907	Persistiance, CA	(729) 893-9115	sally
ABC FUEL CO 621360	Salt Lake City, CA	(323) 028-5127	max
Air Geese 170683	Santa Fe, CA	(012) 519-0970	sarah
Anytime Air Support Inc 130935	St. Petersburg, CA	(576) 805-4052	sally
B Rubble Group Inc 228142	Denver, CA	(534) 730-9697	max
B.C. Investing International 383418	Santa Fe, CA	(104) 325-9381	max
B.C. Investing International 519294	Alabama, CA	(417) 234-6095	max
B.C. Investing International 618263	San Jose, CA	(288) 100-8224	sally

Figure 28: 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 ListView

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 ListView.

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.

Performing a Mail Merge from within Sugar Suite

Mail merge can be done within the Accounts ListView. To perform a mail merge:

1. Select *Mail Merge*. This option appears next to the Export link at the top of the list.
2. Follow the steps in the wizard to identify a Word template to use. Mail merge templates that appear during this process are Documents where the Mail Merge Template checkbox is selected.

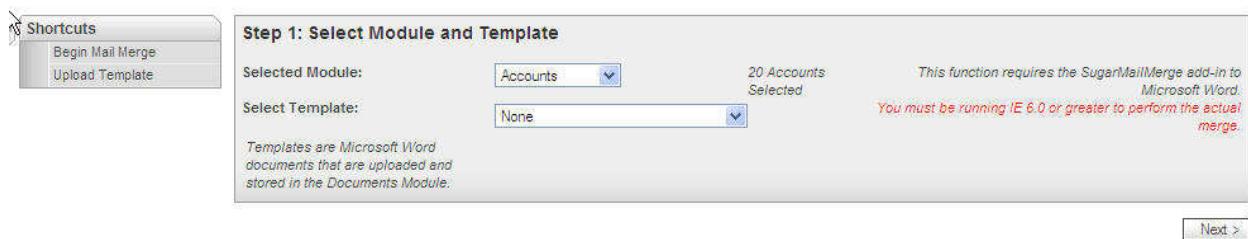


Figure 29: Mail Merge Template Selection

3. Click Finish to exit the wizard and begin the actual mail merge.

Accounts DetailView

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

1. Click the link.
2. In the popup, identify the contacts associated with the account.
3. The address fields are propagated.

Navigation Shortcuts

Navigation Shortcut – Create Account: The EditView allows the user to create an account. The Account Name field is the required field in the system. User needs to enter the Account Name information at the minimal in order for the system to save the record.

The screenshot shows the 'Accounts' module's 'Create Account' edit view. It includes a 'Shortcuts' sidebar with options like Create Account, Accounts, Account Reports, and Import. The main form has sections for 'Account Information' (with required fields marked with an asterisk), 'Address Information' (with 'Billing Address' and 'Shipping Address' sections), and 'Description Information'. Buttons for Save and Cancel are at the top.

Figure 30: Accounts Module (Create Account EditView)

Navigation Shortcut – Import Accounts: User 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.

The screenshot shows the 'Import Step 1: Select the Source' screen. It features a 'Shortcuts' sidebar and a list titled 'What is the data source?' with options: Salesforce.com (selected), Act 2005, Custom Comma Delimited File, and Custom Tab Delimited File. A 'Next >' button is at the bottom right.

Figure 31: Accounts Module (Import EditView)

Leads Module

The Leads Module ListView is selected using the Leads navigation tab:

The screenshot shows the SugarCRM Leads module. At the top, there's a navigation bar with links for Home, My Portal, Calendar, Activities, Contacts, Accounts, Leads (which is highlighted in red), Opportunities, Cases, Bug Tracker, Documents, Emails, and a search bar. Below the navigation is a banner with 'Welcome Will' and a list of recent activities. On the left, there's a sidebar with 'Shortcuts' (Create Lead, Create From vCard, Leads, Import) and a 'New Lead' form with fields for First Name, Last Name, Phone, and Email, and a 'Save' button. The main area is titled 'Leads: Home' and contains a 'Lead Search' section with fields for First Name, Last Name, Lead Source, and search options. Below that is a 'Lead List' section with a table of leads. The table has columns for Name, Status, Account Name, Email, Phone, and User. Each lead row includes a checkbox at the beginning. The lead list table shows 333 entries, with page navigation buttons for Start, Previous, Next, and End.

Name	Status	Account Name	Email	Phone	User
Lolita Alder	New	T-Cat Media Group Inc	Lolita_Alder@company.com	(366) 279-6442	chris
Cesar Alvarez	Assigned	A.D. Arts & Crafts Inc	Cesar_Alvarez@company.com	(628) 635-6747	chris
Marcus Aman		MMM Mortuary Corp	Marcus_Aman@company.com	(082) 980-5988	will
Mose Arbogast	Dead	ABC FUEL CO	Mose_Arbogast@company.com	(836) 095-3253	chris
Omer Arena	New	Green Tractor Group Limited	Omer_Arena@company.com	(107) 841-0006	chris
Damon Argo		K Kringle IndKA. Tower & Co	Damon_Arго@company.com	(238) 422-7474	will
Jesus Arrington	New	White Cross Co	Jesus_Arrington@company.com	(484) 126-4096	will
Carla Arteaga	Recycled	Overhead & Underfoot Ltd.	Carla_Arteaga@company.com	(219) 912-3837	chris
Ronny Arvizu	New	Nimble Technologies Inc	Ronny_Arvizu@company.com	(371) 938-0093	chris
Bennie Asencio	Recycled	A 99 Capital Inc	Bennie_Asencio@company.com	(745) 397-3703	will
Gayla Ault	In Process	Doggie Diner Co Ltd	Gayla_Ault@company.com	(953) 120-2409	will
Susanna Aust	Dead	S Cane Sweeteners Ltd	Susanna_Aust@company.com	(021) 248-5362	will

Figure 32: 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 switch back to the Leads ListView. As well, an Import facility is provided, to bring in bulk lead data from Salesforce.com, or other applications.

Navigation Shortcut – Create Lead: Create Lead EditView provides the form for creating a new lead. The Last Name text field is the required field on this page. User needs 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.

The screenshot shows the 'Leads' module's 'Create Lead' edit view. On the left is a sidebar with 'Shortcuts' containing 'Create Lead', 'Create From vCard', 'Leads', and 'Import'. The main area has tabs for 'Leads' and 'Import vCard'. The 'Leads' tab is active. It contains three main sections: 'Lead Information', 'Address Information', and 'Description Information'. The 'Lead Information' section includes fields for Lead Source (dropdown), Referrer By (dropdown), First Name (dropdown), Last Name (text input, marked with a red asterisk), Account Name (text input), Title (text input), Department (text input), Do Not Call (checkbox), Team (dropdown), Assigned to (dropdown), Status (dropdown), Status Description (dropdown), and various phone and email fields. The 'Address Information' section includes Primary Address (text input), Other Address (text input), and address fields for City, State, Postal Code, and Country. The 'Description Information' section has a large text area for Description.

Figure 33: Leads Module (Create Lead EditView)

Navigation Shortcut – Create From vCard: Using Create from vCard shortcut user can 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.

The screenshot shows the 'Leads' module's 'Create From vCard' edit view. On the left is a sidebar with 'Shortcuts' containing 'Create Lead', 'Create From vCard', 'Leads', and 'Import'. The main area has tabs for 'Leads' and 'Import vCard'. The 'Import vCard' tab is active. It contains a single section for 'Import vCard' which includes a 'Browse...' button to select a vCard file and an 'Import vCard' button to process the import.

Figure 34: Leads Module (Create From vCard EditView)

Navigation Shortcut – Import Leads: Another option of creating 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 35: Leads Module (Import EditView)

Opportunities Module

The Opportunities Module ListView is selected using the Opportunities navigation tab:

Opportunity	Account Name	Sales Stage	Amount	Close	User
MTM Investment Bank F S B 352748 - 1000 units	MTM Investment Bank F S B 352748	Qualification	\$ 25000	2005-07-12	will
Nimble Technologies Inc 528918 - 1000 units	Nimble Technologies Inc 528918	Perception Analysis	\$ 75000	2005-10-16	chris
NW Capital Corp 829545 - 1000 units	NW Capital Corp 829545	Value Proposition	\$ 50000	2005-06-29	chris
OTC Holdings 160113 - 1000 units	OTC Holdings 160113	Perception Analysis	\$ 75000	2005-06-07	will
Pullman Cart Company 524531 - 1000 units	Pullman Cart Company 524531	Needs Analysis	\$ 25000	2005-12-17	chris
Q3 ARVRO III PR 769357 - 1000 units	Q3 ARVRO III PR 769357	Prospecting	\$ 25000	2005-11-20	chris
RIVIERA HOTELS 386311 - 1000 units	RIVIERA HOTELS 386311	Qualification	\$ 10000	2005-12-18	will
RRR Advertising Inc. 425081 - 1000 units	RRR Advertising Inc. 425081	Id. Decision Makers	\$ 25000	2005-06-14	will
Southern Realty 427720 - 1000 units	Southern Realty 427720	Proposal/Price Quote	\$ 75000	2005-10-24	will
TJ O'Rourke Inc 838634 - 1000 units	TJ O'Rourke Inc 838634	Perception Analysis	\$ 10000	2005-12-24	chris
Tortoise Corp 168193 - 1000 units	Tortoise Corp 168193	Closed Lost	\$ 10000	2004-05-05	will
Tri-State Medical Corp 240938 - 1000 units	Tri-State Medical Corp 240938	Prospecting	\$ 25000	2006-04-22	will

Figure 36: 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 ListView. 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 the user to enter the information for creating a new opportunity. There are five required fields in this screen: Opportunity Name, Account Name, Amount, Expected Close Date and Sales Stage. Opportunity Name: the given name for this particular opportunity. Account Name is 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 is the amount of the opportunity. Expected Close Date is the expected or estimated close date for this particular opportunity. Sales Stage is the current stage of this opportunity.

The screenshot shows the 'Opportunities' form. On the left is a sidebar with 'Shortcuts' containing 'Create Opportunity', 'Opportunities', 'Opportunity Reports', and 'Import'. The main area has a title 'Opportunities:' and includes fields for 'Opportunity Name' (with a required asterisk), 'Account Name' (with a dropdown menu showing 'Selected'), 'Type' (dropdown: 'None', 'Prospecting', 'Lead'), 'Lead Source' (dropdown: 'None', 'Prospecting'), 'Team' (dropdown: 'None', 'Sales'), 'Assigned to' (dropdown: 'None', 'admin'), 'Description' (text area), 'Currency' (dropdown: 'US Dollar (\$)'), 'Amount' (text input), 'Expected Close Date' (date input with placeholder '(yyyy-mm-dd)'), 'Next Step' (dropdown: 'None', 'Prospecting'), 'Probability (%)' (text input), and 'Sales Stage' (dropdown: 'None', 'Prospecting'). A note at the top right says '* Indicates required field'.

Figure 37: Opportunities Module (Create Opportunity EditView)

Navigation Shortcut – Import Opportunities: Import EditView allows the user 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 user can click on the next button in order to move on to the next step of the importing process.

The screenshot shows the 'Import Step 1: Select the Source' form. On the left is a sidebar with 'Shortcuts' containing 'Create Opportunity', 'Opportunities', 'Opportunity Reports', and 'Import'. The main area has a title 'Import Step 1: Select the Source' and a note 'What is the data source?'. It contains three radio buttons: 'Salesforce.com' (selected), 'Custom Comma Delimited File', and 'Custom Tab Delimited File'. At the bottom right is a 'Next >' button.

Figure 38: Opportunities Module (Import Opportunity EditView)

Cases Module

The Cases Module ListView is selected using the Cases navigation tab:

The screenshot shows the SugarCRM interface for the Cases module. At the top, there's a navigation bar with links for Home, My Portal, Calendar, Activities, Contacts, Accounts, Leads, Opportunities, Cases, Bug Tracker, Documents, Emails, and a search bar. The 'Cases' link is highlighted. Below the navigation is a 'Welcome Will' message and a 'Last Viewed' section with three items: 'Broken laptop d...', 'Possible produc...', and 'Needs passwords...'. On the left, there's a 'Shortcuts' panel with 'Create Case' and 'Cases' options, and a 'New Case' sub-panel with fields for 'Subject' and 'Account Name' (with a 'Change' button), and a 'Save' button. The main area is titled 'Cases: Home' and contains a 'Case Search' section with fields for 'Subject' and 'Account Name', and buttons for 'Search' and 'Clear'. Below that is a 'Case List' section with a table of cases. The table has columns for 'Num.', 'Subject', 'Account Name', 'Priority', 'Status', and 'User'. The first four rows of the table are:

Num.	Subject	Account Name	Priority	Status	User
5	Broken laptop display on delivery	International Art Inc 641231	Medium	New	will
4	Cable problem	B.C. Investing International 337715	Medium	New	will
2	Needs passwords reset	3rd Round Funding 785046	High	New	will

At the bottom of the list are buttons for 'Update' and 'Delete'. Below the table are dropdown menus for 'Assigned to:' and 'Status:', and input fields for 'Account Name' and 'Priority'.

Figure 39: 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 ListView.

Navigation Shortcut – Create Case: Create Case window provides the necessary space for user 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.

The screenshot shows the 'Cases' module's 'Create Case EditView'. At the top left is a 'Shortcuts' bar with icons for 'Create Case' and 'Cases'. The main title 'Cases:' is at the top center. Below it are several input fields and dropdown menus:

- Case Number:** A dropdown menu set to 'Medium'.
- Status:** A dropdown menu set to 'New'.
- Subject:** A required field indicated by a red asterisk (*).
- Description:** A large text area for case details.
- Resolution:** A large text area for case resolution.
- Team:** A dropdown menu set to '(admin)'.
- Assigned to:** A dropdown menu set to 'admin'.
- Account Name:** A required field indicated by a red asterisk (*), with a 'Select' button next to it.

A small note in the top right corner says '* Indicates required field'.

Figure 40: Cases Module (Create Case EditView)

Bug Tracker Module

The Bug Tracker Module ListView is selected using the Bug Tracker navigation tab:

Num.	Subject	Status	Type	Priority	Release	User
3	Sticky 'A' key on laptop keyboard	New	Defect	Medium		will
4	Monitor settings issue	New	Defect	High		will
5	Cable problem	New	Defect	Medium	Version 2.0	will
6	Copyright year is out of date	New	Defect	Low	Version 2.0	will

Figure 41: 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 switch back to the Bug ListView. 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 EditView allows the user to submit new bug 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.

The screenshot shows a 'Bug Tracker' form titled 'Report Bug'. It includes the following fields:

- Assigned to:** admin (admin)
- Team:** (admin)
- Resolution:** -None-
- Fixed in Release:** -None-
- Subject:** * (highlighted in red)
- Description:** (large text area)
- Work Log:** (large text area)

At the top left, there is a 'Shortcuts' section with 'Report Bug' and 'Bugs' options. At the top right, there is a 'Help' link and a note indicating that the 'Subject' field is a required field.

Figure 42: Bug Tracker Module (Report Bug EditView)

Documents Module

The Documents Module ListView is selected using the Documents tab:

The screenshot shows the SugarCRM interface for the Documents module. At the top, there's a navigation bar with links like Home, My Portal, Calendar, Activities, Contacts, Accounts, Leads, Opportunities, Cases, Bug Tracker, Documents (which is highlighted in red), and Emails. To the right of the navigation bar are links for My Account, Employees, Logout, and About. The main title is "Documents: Home". Below the title is a "Document Search" section with fields for Document Name, Category, Sub Category, and buttons for Search and Clear. Underneath is a "Document List" section with a table showing two documents: "Doc" and "Doc 2". The table includes columns for Document, Category, Sub Category, Revision, Published By, Revision Date, Active Date, and Expiration Date. At the bottom of the list are buttons for Update and Delete, and dropdown menus for Date Active, Category, Sub Category, and Status.

Document	Category	Sub Category	Revision	Published By	Revision Date	Active Date	Expiration Date
Doc	Marketing		2.0	Will Westin	2005-04-28 21:41:00	2005-04-29	2005-05-31
Doc 2	Sales	Marketing Collateral		Will Westin	2005-04-28 21:40:00	2005-04-29	2005-05-31

Figure 43: 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 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 ListView.

Navigation Shortcuts

Navigation Shortcut – Create Document: This edit window provides the text box and the drop down menu for adding detailed information to the document that is uploaded into the system. Document Name, File Name, Publish Date and Revision are the required fields. Document Name is a brief descriptive name of the document. File Name: use the browse button to locate the document from the local storage. Publish Date is date of document upload. Revision: version of the document.

The screenshot shows the 'Create Document' form in the Sugar Suite Documents module. The form has the following fields and controls:

- Shortcuts:** Buttons for 'Create Document' and 'Documents List'.
- Buttons:** 'Save' and 'Cancel'.
- Document Name:** A text input field with a required asterisk (*).
- File Name:** A text input field with a 'Browse...' button.
- Category:** A dropdown menu with options: -None-, Admin, and Sales.
- Status:** A dropdown menu with options: -None-, Active, and Draft.
- Publish Date:** A date picker set to 2005-11-14.
- Description:** A large text area for document details.
- Revision:** A text input field with a required asterisk (*).
- Sub Category:** A dropdown menu.
- Team:** A dropdown menu.
- Expiration Date:** A date picker.
- Help:** A link to help.
- Indicates required field:** A note with a red asterisk (*) next to required fields.

Figure 44: Documents Module (Create Document EditView)

Emails Module

The Emails Module ListView is selected using the Emails tab:

The screenshot shows the SugarCRM interface with the 'Emails' tab selected. The main title is 'Emails: My Inbox'. On the left, there's a sidebar with 'Shortcuts' including 'My Inbox (10 New)', 'My Drafts', 'Sent Emails', 'Group Inbox (41 New)', and various email-related options like 'Compose Email', 'Create Archived Email', etc. The main area displays a list of 10 emails from 'will' to 'Email 171'. Each email has a checkmark icon and a subject line. The columns are: Subject, Contact, Related to, Assigned To, Type, Status, and Created. Below the list are 'Export' and 'Check All - Clear All' buttons, and at the bottom are 'Update' and 'Delete' buttons.

Subject	Contact	Related to	Assigned To	Type	Status	Created
# Email 162			will	Inbound	unread	2005-11-18 18:53
# Email 163			will	Inbound	unread	2005-11-18 18:53
# Email 164			will	Inbound	unread	2005-11-18 18:53
# Email 165			will	Inbound	unread	2005-11-18 18:53
# Email 166			will	Inbound	unread	2005-11-18 18:53
# Email 167			will	Inbound	unread	2005-11-18 18:53
# Email 168			will	Inbound	unread	2005-11-18 18:53
# Email 169			will	Inbound	unread	2005-11-18 18:53
# Email 170			will	Inbound	unread	2005-11-18 18:53
# Email 171			will	Inbound	unread	2005-11-18 18:53

Figure 45: Emails Module

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

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 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 Email in the list to display the detail information for that Email.
- Use the navigation shortcuts to create a new Email.
- Use the Email ListView to create or view Email Templates or view Archived Emails.

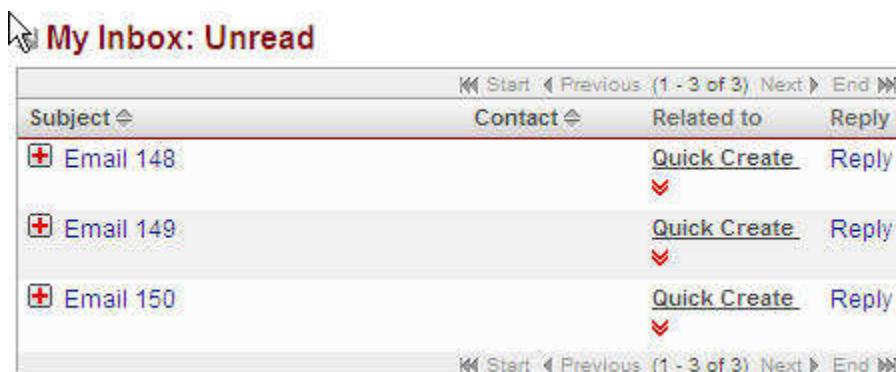
Creating Emails

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 Prospect 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

This illustration shows a user's My Inbox list:

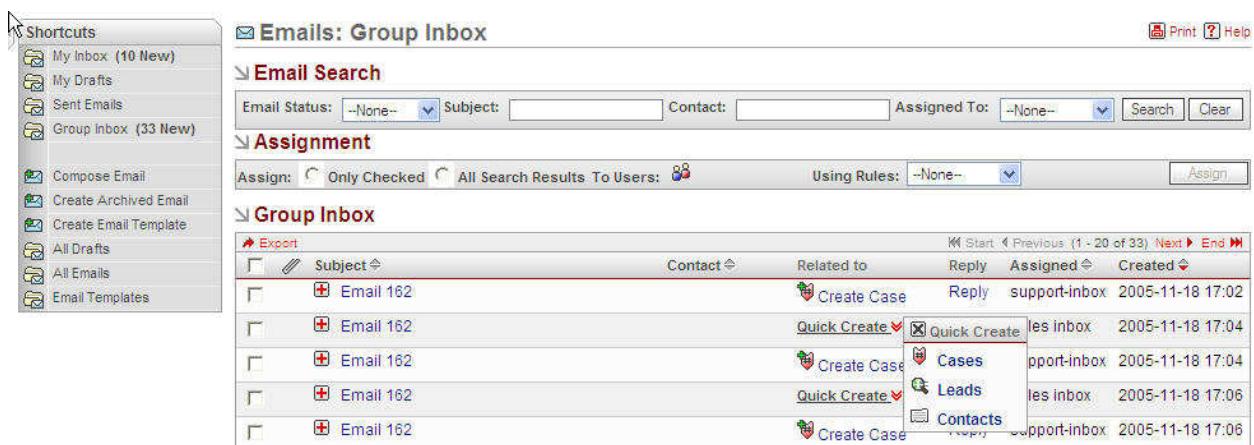


Subject	Contact	Related to	Reply
Email 148		Quick Create	Reply
Email 149		Quick Create	Reply
Email 150		Quick Create	Reply

Figure 46: My Inbox

Group Inbox

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



Subject	Contact	Related to	Reply	Assigned To	Created
Email 162		Create Case	Reply	support-inbox	2005-11-18 17:02
Email 162		Quick Create	Quick Create	les inbox	2005-11-18 17:04
Email 162		Create Case	Cases	opport-inbox	2005-11-18 17:04
Email 162		Quick Create	Leads	les inbox	2005-11-18 17:06
Email 162		Create Case	Contacts	support-inbox	2005-11-18 17:06

Figure 47: Group Inbox

Inbound Email

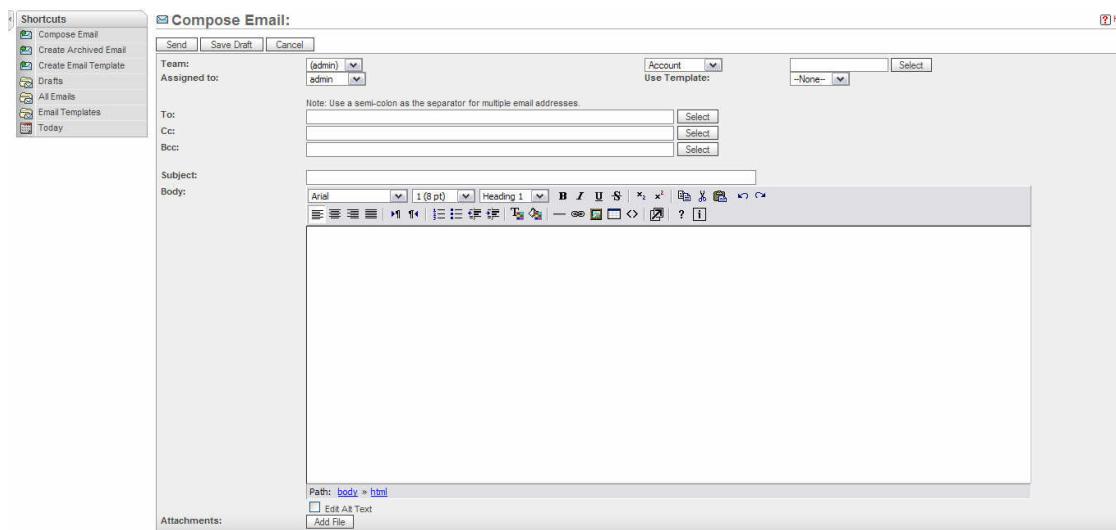
The Inbound Email feature provides the capability to monitor, route, assign, and reply to emails. Multiple mailboxes can be monitored, such as support@company.com or sales@company.com. Items contained in these email boxes can be parsed and associations made to applicable existing Sugar records, such 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 window for composing an email message. Standard text fields such as To, Cc, Bcc and subject field are near the top of the panel. If the user wants to add an attachment to the message he/she can do that by clicking the add file button at the bottom of the page.

**Figure 48: Emails Module (Compose Email EditView)**

Navigation Shortcut – Create Archived Email: You can create archived email using this window. 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.

The screenshot shows the 'Archived Emails' edit view. It features a 'Shortcuts' sidebar on the left with options like Compose Email, Create Archived Email, Create Email Template, Drafts, All Emails, Email Templates, and Today. The main form has a title bar 'Archived Emails' with 'Save' and 'Cancel' buttons. Fields include 'Date & Time Sent' (set to 23:00), 'Team' (admin), 'Assigned to' (admin), 'From' (empty), 'To' (empty), 'Cc' (empty), 'Bcc' (empty), 'Subject' (empty), and a large 'Body' text area. At the bottom are 'Attachments:' and 'Add File' buttons.

Figure 49: Emails Module (Create Archived Email EditView)

Navigation Shortcut – Create Email Template: User can create an email template by using the template feature. First create a name for the template. The name is used for as the search criteria in the email template ListView and 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.

The screenshot shows the 'Email Templates' edit view. It has a 'Shortcuts' sidebar with the same options as Figure 49. The main form has a title bar 'Email Templates' with 'Save' and 'Cancel' buttons. Fields include 'Name' (empty), 'Description' (empty), 'Insert Variable' (Accounts, ID, Saccount_id), 'Subject' (empty), and a rich text editor for 'Body'. The rich text editor toolbar includes buttons for font, size, bold, italic, underline, etc. A status bar at the bottom shows 'Path: body > html' and 'Edit All Text'.

Figure 50: Emails Module (Create Email Template EditView)

Campaigns Module

The Campaigns Module ListView is selected using the Documents navigation tab:

Figure 51: Campaigns Module

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

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 Prospect 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 prospects. 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 an email template.
- Create a campaign.
- Create an email marketing record associated to the campaign.
- Create or select an associated prospect list

If the prospect list has no associated prospects, create or add prospects to the prospect list.

The email campaign now sends the next time your scheduled EmailMan process executes. For testing purposes, you can force the EmailMan process to execute by clicking the following URL:

<http://<server>/<sugarcrm>/emailmandelivery.php?verbose=true>

By putting this URL in your browser and hitting enter, the queued email marketing campaigns will launch and send out emails. You will see a list of the results in your browser.

Creating a Prospect

The screenshot shows the SugarCRM interface for creating a prospect. The main area is titled "Prospects:". It contains three main sections: "Prospect Information", "Address Information", and "Description Information". The "Prospect Information" section includes fields for First Name, Last Name, Title, Department, Birthdate, Office Phone, Mobile, Home, Other Phone, Fax, Email, Other Email, Assistant, Assistant Phone, and Email Opt Out. The "Address Information" section allows for primary and other addresses, with fields for City, State, Postal Code, and Country. The "Description Information" section has a large text area for a description. A "Shortcuts" sidebar on the left provides links to various SugarCRM modules.

Figure 52: Creating a Prospect

Prospects 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.

Creating a Prospect List

The screenshot shows the SugarCRM interface for creating a prospect list. The main area is titled "Prospect Lists:". It includes fields for "Name:" and "Assigned to:", and a large "Description:" text area. A "Shortcuts" sidebar on the left lists various SugarCRM module options.

Figure 53: Creating a Prospect List

Prospect Lists are groupings of Contact, Lead or Prospect records.

Creating an Email Template

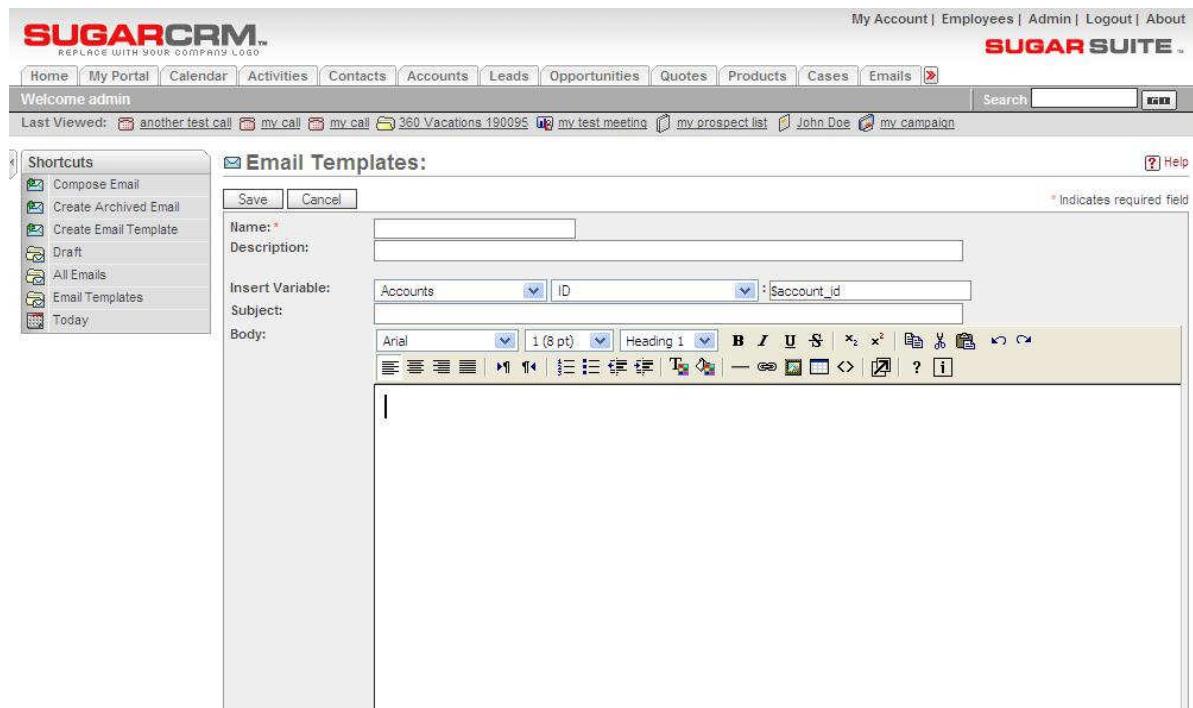


Figure 54: Creating an Email Template

Email Templates can be used in both Email Marketing Campaigns and with standard outbound emails sent by any user in the system. When creating an Email Template, you can specify both the HTML version as well as the text version by clicking on “Alt Text” and entering the text version in the box that opens. Use Account, Contact, Lead or Prospect variables to personalize messages to the recipient.

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.

Creating a Campaign

The screenshot shows the SugarCRM interface for creating a campaign. The top navigation bar includes links for My Account, Employees, Admin, Logout, and About. The main title is "Campaigns: my campaign". On the left, there is a sidebar with "Shortcuts" containing links for Create Campaign, Campaigns, Create Prospect List, Prospect Lists, Create Prospect, and Prospects. The main form fields are:

- Name:** my campaign
- Status:** Planning
- Start Date:** 2005-09-09
- End Date:** 2005-09-16
- Type:** Email
- Budget:** 0
- Expected Revenue:** 0
- Actual Cost:** 0
- Expected Cost:** 0
- Objective:** (empty text area)
- Description:** (empty text area)

Figure 55: 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 are 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 Link Text, that person's browser first visit the Tracker URL in order to track the click-through and then is redirected to the Tracker Redirect URL.

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 Prospect List
 - merge with existing Prospect List
3. Select prospects, leads, contacts, test, and seeds 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 Prospects 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.

Example: Campaign Management DetailView

The following illustrates a DetailView of a campaign management example:

Campaigns: SugarBuzz Newsletter

Name: SugarBuzz Newsletter
Status: Active
Start Date: 2005-11-18
End Date: 2006-11-18
Type: Email
Budget: (US Dollar : \$) 1234.00
Expected Revenue: (US Dollar : \$) 50000.00
Actual Cost: (US Dollar : \$) 0.00
Expected Cost: (US Dollar : \$) 0.00
Objective: Create additional sales and awareness for the latest release
Description: This newsletter creates awareness about the latest Sugar Release and the activities planned by the Sugar CRM team.
Tracker Link Text:
Tracker Redirect URL: <http://>

Prospect List

Prospect List	Description	Email Marketing Message	Prospects in List
SugarBuzz 2005 List	Main list	SugarBuzz News letter	45
SugarBuzz 2005 TestList	Test List	SugarBuzz News letter	4
SugarBuzz Seed List	Seed List	SugarBuzz News letter	9
SugarBuzz 2005 Suppression list	Suppression List	SugarBuzz News letter	5
Prep Test	Prep test list	Thank You Event letter	12

Email Marketing

Name	Start Date	Status	Email Template
SugarBuzz News letter	2006-11-18	Active	SugarBuzz mail
Thank You Event letter	2005-11-18	Active	Thank You Template

[Home](#) | [My Portal](#) | [Calendar](#) | [Activities](#) | [Contacts](#) | [Accounts](#) | [Leads](#) | [Opportunities](#) | [Cases](#) | [Bug Tracker](#) | [Documents](#) | [Emails](#)
[Campaigns](#) | [Projects](#) | [RSS](#) | [Dashboard](#)

Server response time: 0.195442 seconds.
 © 2004-2005 SugarCRM Inc. All Rights Reserved.
 POWERED BY **SUGARCRM**.

Figure 56: Campaign Management DetailView Example

Example: Campaign Management Activity View

The following illustrates an Activity View of a campaign management example. Notice that this illustration shows a complete view of the Campaign status.

SUGARCRM. Reinforce Suite with Open Source CRM

My Account | Employees | Admin | Logout | About

SUGAR SUITE

Welcome admin

Last Viewed: SuperBuzz News, Thank You Event, Base Implementations, Base Implementations, SugarBuzz 2005 Lead, SuperBuzz News, Sunlight Web.

Campaigns: SugarBuzz Newsletter

To Detail View | Delete Test Entries | Print | Help

New Change Log

Name: SugarBuzz Newsletter
Status: Active
Start Date: 2005-11-18
End Date: 2006-11-18
Type: Email

Budget: (US Dollar) \$ 1234.00 Actual Cost: (US Dollar) \$ 0.00
Expected Revenue: (US Dollar) \$ 50000.00 Expected Cost: (US Dollar) \$ 0.00

Objective: Create additional sales and awareness for the latest release
Description: This newsletter creates awareness about the latest Sugar Release and the activities planned by the Sugar CRM team.

Campaign Response by Recipient Activity

Rollover a bar to view details.

Message Queue

Recipient Name | Recipient Email | Marketing Id | Send On

Chin Lee	Chin@example.com	SugarBuzz News letter	2005-11-18 11:00
Curt Anderson	Curt@example.com	SugarBuzz News letter	2005-11-18 11:00
Cassandra Jackson	Cassandra@example.com	SugarBuzz News letter	2005-11-18 11:00
Latisha Robbins	Latisha@example.com	SugarBuzz News letter	2005-11-18 11:00
Janelle Hemelrijck	Janelle@example.com	SugarBuzz News letter	2005-11-18 11:00
Kiana Brew	Kiana@example.com	SugarBuzz News letter	2005-11-18 11:00
Brett Whitley	Brett@example.com	SugarBuzz News letter	2005-11-18 11:00
Aditi Singh	Aditi@example.com	SugarBuzz News letter	2005-11-18 11:00
Reyhana Smith	Reyhana@example.com	SugarBuzz News letter	2005-11-18 11:00
Yuri Fedorov	Yuri@example.com	SugarBuzz News letter	2005-11-18 11:00

Message Sent/Attempted

Add To Prospect List

Recipient Name | Recipient Email | Activity Type | Activity Date | Related

Breed Worker	manoj@sugarcrm.com	Message Sent/Attempted	2005-11-19 03:13	SugarBuzz News letter: Thank You
Breed Worker	manoj@sugarcrm.com	Message Sent/Attempted	2005-11-19 03:13	SugarBuzz News letter: Thank You
Breed Worker	manoj@sugarcrm.com	Message Sent/Attempted	2005-11-19 03:13	SugarBuzz News letter: Thank You
Breed Worker	manoj@sugarcrm.com	Message Sent/Attempted	2005-11-19 03:13	SugarBuzz News letter: Thank You
Breed Worker	manoj@sugarcrm.com	Message Sent/Attempted	2005-11-19 03:13	SugarBuzz News letter: Thank You
Breed Worker	manoj@sugarcrm.com	Message Sent/Attempted	2005-11-19 03:13	SugarBuzz News letter: Thank You
Breed Worker	manoj@sugarcrm.com	Message Sent/Attempted	2005-11-19 03:13	SugarBuzz News letter: Thank You
Breed Worker	manoj@sugarcrm.com	Message Sent/Attempted	2005-11-19 03:13	SugarBuzz News letter: Thank You
Breed Worker	manoj@sugarcrm.com	Message Sent/Attempted	2005-11-19 03:13	SugarBuzz News letter: Thank You
Breed Worker	manoj@sugarcrm.com	Message Sent/Attempted	2005-11-19 03:13	SugarBuzz News letter: Thank You
Robert Worker	manoj@sugarcrm.com	Message Sent/Attempted	2005-11-19 03:13	SugarBuzz News letter: Thank You
Boss1 Worker	manoj@sugarcrm.com	Message Sent/Attempted	2005-11-19 03:13	SugarBuzz News letter: Thank You

Viewed Message

Add To Prospect List

Recipient Name | Recipient Email | Activity Type | Activity Date | Related

Boss1 Worker	manoj@sugarcrm.com	Viewed Message	2005-11-19 03:14	
Breed Worker	manoj@sugarcrm.com	Viewed Message	2005-11-19 03:14	
Collin1 Worker	manoj@sugarcrm.com	Viewed Message	2005-11-19 03:14	
Breed Worker	manoj@sugarcrm.com	Viewed Message	2005-11-19 03:15	
Breed Worker	manoj@sugarcrm.com	Viewed Message	2005-11-19 03:15	
Breed Worker	manoj@sugarcrm.com	Viewed Message	2005-11-19 03:15	
Breed Worker	manoj@sugarcrm.com	Viewed Message	2005-11-19 03:15	

Click-thru Link

Add To Prospect List

Recipient Name | Recipient Email | Activity Type | Activity Date | Related

Breed Worker	manoj@sugarcrm.com	Click-thru Link	2005-11-19 03:15	
Breed Worker	manoj@sugarcrm.com	Click-thru Link	2005-11-19 03:15	
Breed Worker	manoj@sugarcrm.com	Click-thru Link	2005-11-19 03:15	

Leads Created

Add To Prospect List

Recipient Name | Recipient Email | Activity Type | Activity Date | Related

--	--	--	--	--

Contacts Created

Add To Prospect List

Recipient Name | Recipient Email | Activity Type | Activity Date | Related

--	--	--	--	--

Bounced Messages,Invalid Email

Add To Prospect List

Recipient Name | Recipient Email | Activity Type | Activity Date | Related

--	--	--	--	--

Bounced Messages,Other

Add To Prospect List

Recipient Name | Recipient Email | Activity Type | Activity Date | Related

--	--	--	--	--

Opted Out

Add To Prospect List

Recipient Name | Recipient Email | Activity Type | Activity Date | Related

--	--	--	--	--

Home | My Portal | Calendar | Activities | Contacts | Accounts | Leads | Opportunities | Cases | Bug Tracker | Documents | Emails | Campaigns | Projects | RSS | Dashboard

Powered by **SUGARCRM**

Server response time: 0.954504 seconds
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Figure 57: Campaign Management Activity View Example

Creating an Email Marketing Record

The screenshot shows the SugarCRM interface with the title 'Email Marketing:' in the center. On the left, there is a sidebar titled 'Shortcuts' containing links like 'Create Campaign', 'Campaigns', 'Create Prospect List', etc. The main form has fields for 'Name' (set to 'Learn more about SugarCRM'), 'From Name' (set to 'SugarCRM'), 'Start Date & Time' (set to '2005-09-09 11:00'), 'From Email Address' (set to 'no-reply@sugarcrm.com'), and 'Email Template' (set to 'Learn more about SugarCRM'). A note at the top right says '* Indicates required field'. At the bottom left of the form are 'Save' and 'Cancel' buttons.

Figure 58: Creating an Email Marketing Record

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.

As soon as a Prospect List is attached to the parent campaign record and the email marketing start date and time is in the past, outbound emails are 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.

View Queued Outbound Marketing Campaign Emails

The screenshot shows the 'Mass Email Queue Management' screen. On the left, there is a sidebar titled 'Shortcuts' with links like 'View Queued Emails' and 'View Processed Emails'. The main area has a 'Queue Search' section with fields for 'Campaign', 'Recipient Name', 'Recipient Email', and search buttons. Below it is a 'Queue' section displaying a table of queued emails. The table has columns for 'Campaign', 'Recipient Name', 'Recipient Email', 'From Name', 'From Email', 'User Name', 'Send On', 'Send Attempts', and 'In Process'. One row is shown, corresponding to the campaign from Figure 58.

Campaign	Recipient Name	Recipient Email	From Name	From Email	User Name	Send On	Send Attempts	In Process
Sept 2005 - Learn more about SugarCRM	clint.oram@sugarcrm.com	SugarCRM	no-reply@sugarcrm.com	Administrator	2005-09-09 09:00	0	0	0

Figure 59: Viewing Queued Emails

All emails queued for delivery by the EmailMan process are displayed in this screen accessed by clicking on Admin and then on Mass Email Manager. The EmailMan process only attempts to send an email up to five times. You can remove emails from the delivery queue by selecting the check box to the left of the email and then clicking "Delete."

View Processed Outbound Marketing Campaign Emails

The screenshot shows the SugarCRM interface with the title 'Mass Email Queue Management'. In the left sidebar, under 'Shortcuts', there is a link to 'View Processed Emails'. The main content area is titled 'Processed' and displays a table of processed emails. The table has columns for Campaign, Recipient Name, Recipient Email, From Name, From Email, User Name, Send On, Send Attempts, and In Process. One row is visible in the table:

Campaign	Recipient Name	Recipient Email	From Name	From Email	User Name	Send On	Send Attempts	In Process
Sept 2005 - Learn more campaign	Clint Oram	clint.oram@sugarcrm.com	SugarCRM	no-reply@sugarcrm.com	Administrator	2005-09-09 09:00	0	

Below the table are buttons for 'Check All - Clear All' and 'Delete'.

Figure 60: Viewing Processed Emails

All processed emails are displayed in the “View Processed Emails” screen. Statistics such as the send date and number of times an email was attempted to be sent are tracked.

Navigation Shortcuts

Navigation Shortcut – Create Campaign: The EditView of the campaign module provides the form for creating a new campaign. The required fields are Name, Status, End Date and Type. Name: a short descriptive name for the campaign. Status is stage where the campaign is at such as planning, active, inactive or complete. End Date is end date of the campaign. Type: what type of campaign is this? Is this a mail, telephone, email etc. The tracker redirect URL text box is on the bottom of this panel.

The screenshot shows the 'Campaigns' module's Create Campaign EditView. The form includes fields for Name, Status, Start Date, End Date, Type, Budget, Expected Revenue, Objective, Description, and two text areas for Tracker Link Text and Tracker Redirect URL. A sidebar on the left lists navigation shortcuts for campaigns.

Figure 61: Campaigns Module (Create Campaign EditView)

Navigation Shortcut – Create Prospect: This edit form enable the user to create a new prospect. This window is divided into three sub-panels:

- Prospect information - Last Name is the required field so it needs to be filled in order for the application to save the new prospect detail.

- Address Information - This section has the space for primary address and other address. User can enter the address information on either one of the section and duplicate the information if they are the same by using the arrow buttons.
- Description Information – This is space for adding extra notes to this prospect.

The screenshot shows the 'Prospects' edit view in the Sugar Suite interface. On the left, there's a sidebar with 'Shortcuts' containing links like 'Create Campaign', 'Campaigns', 'Create Prospect List', 'Prospect Lists', 'Create Prospect', 'Prospects', and 'Import'. The main area has tabs for 'Prospect Information', 'Address Information', and 'Description Information'. Under 'Prospect Information', fields include First Name, Last Name, Title, Department, Birthdate, Do Not Call, Team, and Assigned to. There are dropdown menus for these fields. Under 'Address Information', there are fields for Primary Address, Other Address, City, State, Postal Code, and Country, along with a button for moving items between lists. Under 'Description Information', there is a large text area for a description. At the top right, there's a note about required fields and a 'Help' link.

Figure 62: Campaigns Module (“Create Prospect” EditView)

A prospect is someone who you only have some information on but doesn't qualify as a lead or contact. The components and the process of using the Campaigns module starts with a prospect. After you have more than one prospect, you can group the prospects into a prospect 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 prospect list from the Campaigns List.

The general process flow is as follows:

Prospect → Prospects List → Campaign → Campaigns List

Projects Module

The Projects Module ListView is selected using the Projects navigation tab:

Name	Project	Date Due	Status	Assigned To
Book Hotel and Flight	Tradeshow	2005-04-19	Not Started	will
Learn demo script	Tradeshow	2005-04-19	In Progress	chris
Ship demo equipment	Tradeshow	2005-04-25	Not Started	chris
Write demo script	Tradeshow	2005-04-05	Completed	will

Figure 63: 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 ListView is the sum of all Project Tasks' estimated effort. The Total Actual Effort column in the Project ListView 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 may be listed on the screen, and 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 provided help you to create a new Project, or switch back to the Project ListView and also to create a new Task or view all Project Tasks. You can link Projects to Contacts, Accounts, and Opportunities.

Navigation Shortcut – Project List: The ListView displays a list of projects in the system. User 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 in order to see a complete list of projects.

Name	Total Estimated Effort (hrs)	Total Actual Effort (hrs)	Assigned To
Big Fix Inc business process			admin
Client Demo			admin
Research on PDF conversion			admin

Figure 64: Projects Module (Project ListView)

Navigation Shortcut – Create Project: In this EditView user can create a new project by filling out the information in the text box provided. Name text field is a required field therefore user needs to enter the name at the minimal in order for the system to save the new entry in the project list.

Figure 65: Projects Module (Create Project EditView)

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

The screenshot shows the 'Project Tasks' edit view in Sugar Suite. On the left, there is a sidebar with 'Shortcuts' containing links to 'Create Project', 'Project List', 'Create Project Task', and 'Project Tasks'. The main area has a title 'Project Tasks:' and two buttons: 'Save' and 'Cancel'. Below the title, there are several input fields and dropdown menus:

- Name: * (text input)
- Status: Not Started (dropdown menu)
- Task Number: (text input)
- Priority: High (dropdown menu)
- Order: (text input)
- Progress (%): (text input)
- Start Date: (text input) (yyyy-mm-dd) (23:00) (date/time picker)
- Due Date: (text input) (yyyy-mm-dd) (23:00) (date/time picker)
- Description: (large text area)
- Assigned To: admin (dropdown menu)
- Team: (admin) (dropdown menu)
- Depends On: (text input) [Select...]
- Milestone: (text input) [Select...]
- Project: * (dropdown menu)
- Utilization (%): 100 (dropdown menu)
- Estimated Effort (hrs): (text input)
- Actual Effort (hrs): (text input)

A small note at the top right says "* Indicates required field".

Figure 66: Projects Module (Create Project Task EditView)

RSS Module

The RSS Module ListView is selected using the RSS navigation tab:

The screenshot shows the Sugar Suite interface with the RSS module selected. The top navigation bar includes links for My Account, Employees, Logout, and About. The main content area displays three news feeds:

- eWEEK Linux - (visit website)**
 - Embedded Linux: Coming Soon to a Device Near You
 - ADV: FREE WHITE PAPERS from HP
 - Novell Tightens Its Open-Source Embrace
 - Open-Xchange Server 5 Eases Migration
 - Laszlo Updates Open-Source App-Building Platform
- Reuters: Technology - (visit website)**
 - Business Inaction Could Lead to Cybersecurity Law
 - Survey: TV for Mobile Phones Set to Reach Masses
 - Microsoft's Gates Urges End to Tech Visa Limits
 - Tech Giants Launch New Brands to Boost Profits
 - Spitzer Sues Intermix Over 'Spyware'
- Yahoo News: RSS & Blogging - (visit website)**
 - All the Hits on WYOU (U.S. News & World Report)
 - Jerry Brown Enters World of Blogging (AP)
 - 'Canadian Idol' Raises Its Profile (Ziff Davis)
 - Google Puts RSS Advertising to the Test (Ziff Davis)
 - Huffington Invites Celebs to Join Blog (AP)

Figure 67: 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.

- Clicking on the RSS Tab opens the *My RSS News Feeds* screen, as shown in the above. This screen is assembled from all the feeds you have marked as your favorites, and shows the latest information being provided by those feeds. The shortcuts provided let you display the *All RSS News Feeds* screen, or return to the *My RSS News Feeds* screen.
- Each feed on the *My RSS News Feeds* screen has , , and controls to the right side of their header bar, to promote (move higher within the list), demote (move lower in the list), or remove that feed from your list of favorites.
- Within the header bar for each feed, you can also click on the name of the feed to see a full list of the items of information available from that feed, or on the word *Website* to go to the website associated with that feed. Each item of information listed for a feed has a brief title for the item which is linked to the full story or content, and the time and date when that item was added to the feed. Simply click on an item to see the full content in a new browser window.

On the *All RSS News Feeds* screen, a list of all or selected RSS News Feeds from a recent search displays. The RSS News Feeds 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 the Title for any RSS News Feed in the list displays the full set of information currently available from that feed. Each RSS News Feed also has a control to add or remove it from your list of favorites.

Dashboard Module

The Dashboard Module ListView is selected using the Dashboard navigation tab:



Figure 68: Dashboard Module

There are four charts on the Dashboard display. Highlighted item 1 is 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. Highlighted item 2 is 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. Highlighted item 3 is 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. Highlighted item 4 is 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.

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 dialog box for each chart may be closed by clicking on the Edit button again, or you may alter parameters and then click on the Select button to produce a chart from different data. You may right click on each chart to set its display quality, to zoom the image, or to print it (charts are produced using Flash technology). To copy a chart for inclusion in a document (as in the below) you must 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 69: 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.

Database Field	Header Row	Row 1	Row 2
- Do not map this field -	date_entered	19/01/2005 16:56	19/01/2005 16:56
- Do not map this field -	date_modified	19/01/2005 16:56	19/01/2005 16:56
- Do not map this field -	modified_user_id		
- Do not map this field -	assigned_user_id	will_id	will_id
- Do not map this field -	created_by		
- Do not map this field -	team_id	East	East
- Do not map this field -	salutation		
- Do not map this field -	first_name	Ross	Eldon
- Do not map this field -	last_name	Brazil	Christensen
- Do not map this field -	lead_source	Web Site	Employee
- Do not map this field -	title	Director Operations	Mgr Operations
- Do not map this field -	department		
- Do not map this field -	reports_to_id		
- Do not map this field -	birthdate		
- Do not map this field -	do_not_call	0	0
- Do not map this field -	phone_home	(907) 288-8926	(621) 517-4664
- Do not map this field -	phone_mobile	(015) 546-3110	(895) 193-2560
- Do not map this field -	phone_work	(684) 640-8826	(425) 877-2940
- Do not map this field -	phone_other		
- Do not map this field -	phone_fax		
- Do not map this field -	email1	Ross_Brazil@company.com	Eldon_Christensen@company.com

Figure 70: Confirm Fields and Import Screen

Importing Contacts

Now that you have a set of Account records with fully descriptive data, let's 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 ListView 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	modas:name		par account type	industry	ani pho	billing_address_street	billing_address_city	billing_address_state		
2	874fd	01/12/2004 20:00	01/12/2004 20:00	1 Otc Bl	Customer	Government	9 IBM Path		St. Petersburg	CA			
3	89ee1	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	8274_	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	90e14	01/12/2004 20:00	01/12/2004 20:00	1 Ag Media Group Inc	Customer	Engineering	123 Anywhere Street		Cupertino	CA			
8	92c54	01/12/2004 20:00	01/12/2004 20:00	1 Aits Inc	Customer	Manufacturing	9 IBM Path		Cupertino	CA			
9	9478_	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	97ed_	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	9b4at	01/12/2004 20:00	01/12/2004 20:00	1 Aoi Coal Co	Customer	Machinery	9 IBM Path		Cupertino	CA			
14	9cf66	01/12/2004 20:00	01/12/2004 20:00	1 Aoi International Inc	Customer	Shipping	321 University Ave.		Cupertino	CA			
15	9eas5	01/12/2004 20:00	01/12/2004 20:00	1 A&D Co Ltd	Customer	Media	123 Anywhere Street		Sunnyvale	NY			
16	a0551	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	a2044	01/12/2004 20:00	01/12/2004 20:00	1 A-Com Ab	Customer	Telecommunications	67321 West Siam St.		Ohio	CA			
18	a3cet	01/12/2004 20:00	01/12/2004 20:00	1 A-Fern 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	a73b1	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	a828_	01/12/2004 20:00	01/12/2004 20:00	1 A. Schulman Inc	Customer	Utilities	111 Silicon Valley Road		San Jose	NY			
22	aa9et	01/12/2004 20:00	01/12/2004 20:00	1 A.A Importing Company Inc	Customer	Machinery	48920 San Carlos		Sunnyvale	CA			
23	ac551	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	ae031	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	b177_	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	b4fc	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	b6ed	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	b89at	01/12/2004 20:00	01/12/2004 20:00	1 A.M. Castle & Co	Customer		1715 Scott Dr		San Francisco	NY			
31	b4abx	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	bc17t	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	c159t	01/12/2004 20:00	01/12/2004 20:00	1 Abitibi-Consolidated Inc	Customer	Shipping	777 West Filmore		Cupertino	CA			
36	c32b	01/12/2004 20:00	01/12/2004 20:00	1 Aes Gener S A	Customer	Apparel	345 Sugar Blvd.		San Jose	NY			

Figure 71: 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 (*see highlighted item 1, on figure below*). 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:

- System
- Studio
- Bug Tracker
- Mass Email Manager
- Inbound Email
- Sharing Calendar Information

Figure 72: System Administration Module

System

This section describes the various setting associated with system-level administration including configure settings, user management, role management, upgrade wizard, sugar updates, repair, currencies, backups, module loader, and scheduler.

Configure Settings

Sugar Suite can send users an email notification when they are assigned new responsibilities. Within the system administration functions, Configure Settings is used to enable, disable or configure the email notification system.

Email notification settings include the subject line of the email to be sent, the user name and email address from which the email is sent, as well as the Mail Transfer Agent (MTA) to be used. Note that the SMTP (Simple Mail Transfer Protocol) MTA should be selected if your system is running Windows. If your system is running Linux, either the SMTP or sendmail MTA may be selected, depending upon how your server is configured.

If the SMTP MTA is selected, you must also specify the SMTP server name, and port number (default is 25) used to communicate with SMTP. If SMTP Authentication is selected via the checkbox provided, the SMTP User Name and Password to be used must also be provided.

Configure Settings can also enable and disable the email notification system, and establishes the default notification setting for new users.

You can also choose to enable self-service portal integration by selecting the check box. This allows Cases, Notes and other data to be accessed by an external customer self-service portal system.

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, edit the profile, or
- 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:

The screenshot shows a software interface for managing roles. On the left, there's a sidebar titled 'Shortcuts' with three items: 'List Roles', 'List Roles By User', and 'Create Role'. The main area has a title 'Search' with a 'Name' input field and a 'Search' button. Below that is a section titled 'Role' with a table. The table has columns for 'Name' and 'Description'. It contains two rows: 'Junior Staff Member' with the description 'This role is assigned to new hires.' and 'Sales Representative' with the description 'This role is assigned to sales representatives.'. There are navigation buttons at the bottom right of the table.

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

Figure 73: 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, nor does the module 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 DetailViews 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 DetailView. Additionally, the Mass Update function (located at the bottom of ListViews) 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 ListViews) 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 ListView. The user is unable to access the module's ListView when this privilege is not available.

View: All/Owner/None options. Controls access to data that is available in a DetailView. Links from ListViews and sub-panels are disabled when this privilege is not available. Specifically, hyperlink access to the DetailView is disabled from the ListViews, sub-panel link access to the DetailView 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.

Role:Junior Staff Member

Shortcuts

- List Roles
- List Roles By User
- Create Role

Edit Duplicate Delete Cancel

Name: Junior Staff Member
Description: This role is assigned to new hires.

	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

Users

Select

Name	User Name	Email	Phone
Junior SalesRep	junior		

Figure 74: Junior Staff Member Example Role

Example Role: Sales Representative

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

The screenshot shows the 'Role:Sales Representative' configuration screen. On the left, a 'Shortcuts' sidebar includes 'List Roles', 'List Roles By User', and 'Create Role'. The main area has tabs for 'Edit', 'Duplicate', 'Delete', and 'Cancel'. Below these are fields for 'Name: Sales Representative' and 'Description: This role is assigned to sales representatives.' A large grid table lists various Sugar objects (Accounts, Bugs, Calls, etc.) with their access levels (Enabled/Disabled), user types (Normal/Owner), and privilege levels (Owner/All/None) across operations (Access, User Type, Delete, Edit, Export, Import, List, View). At the bottom, a 'Users' section shows a table with columns for Name, User Name, Email, and Phone, containing one entry: 'Junior SalesRep' with 'junior' in all fields. Navigation links like 'Start', 'Previous', 'Next', and 'End' are visible.

	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

Figure 75: 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		
Name	Description	Actions
Sales Representative	This role is assigned to sales representatives.	<input checked="" type="checkbox"/> edit <input checked="" type="checkbox"/> rem
Junior Staff Member	This role is assigned to new hires.	<input checked="" type="checkbox"/> edit <input checked="" type="checkbox"/> rem

Figure 76: Junior Sales Representative Example Role

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.

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.

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 ListView 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.

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.

Backups

You can create a backup of your Sugar application files as a .zip file. Specify a directory that is writable by the same user as the Apache process. Type a file name for the .zip file including the .zip extension. Click Confirm Settings to confirm that backup can be performed. Then click Run Backup to

create the .zip file of your Sugar application files. To backup your database information, refer to your database vendor's documentation.

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.

Scheduler

You can schedule regular emails and emailed reports through the Scheduler.

Reports are emailed to a user depending on what schedule the user has specified for a given report. The reports are sent to the user via email from a PHP script that needs to be run on a regular interval to send out the emails at the appropriate time. The user can choose which reports to receive and how often to send the reports in the Reports tab of the Sugar Suite application.

1. You must correctly configure the email settings outlined in the Configure Settings section. The Scheduled Reports utility uses the same email server connection settings. Notifications do not necessarily have to be turned on, but the settings must be properly configured for users to receive reports via email.
2. The Scheduled Reports utility requires a scheduling program to run the PHP script. For Microsoft Windows, you can use the Task Scheduler. For UNIX, you can use cron. Examples for both are below.

Setting Up the Scheduled Reports Cron Job on UNIX

As a root user, type the following command at the shell prompt, replacing the 'path-to-sugarcrm' with your own path to the Sugar Suite installation directory and replacing the 'apache' with the proper username that the web server runs as (usually defaults to 'apache'):

```
echo "0,10,20,30,40,50 * * * * cd /path-to-sugarcrm;
./process_queue.php" | crontab -u apache
```

This sets up a cron job to check every 10 minutes for whether any reports are due to be emailed out. If any reports need to be sent out, the Scheduled Reports utility will send the scheduled reports immediately to the email address of the user specified under the user's 'My Account' settings of SugarCRM.

For more information about how to specify different times for running the cron job, see the man page of cron:

```
man 5 crontab
```

Setting Up the Scheduler on Microsoft Windows

As a user with Administrator privileges, go to Start > Settings > Control Panel > Scheduled Tasks. Double-click on 'Add Scheduled Task'. When the Scheduled Task Wizard asks you for the program you want Windows to run, browse for the 'process_queue.php' file under your 'path-to-sugarcrm' directory. Continue with the rest of the Wizard, making sure you click on the 'Daily' option when asked when to perform this task.

Before you click on the Finish button for the Scheduled Task Wizard, check the box that says, 'Open advanced properties for this task when I click Finish.' A new dialog box displays after you click Finish. Click on the 'Schedule' tab and then on the 'Advanced' button. Check the box for 'Repeat task' and specify every 10 minutes with a duration of 24 hours.

Studio

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

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 ListView, DetailView, or EditView, 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  adds a row below the one currently selected, and pressing the  removes the row currently selected. This feature is named *Edit Columns* in ListViews.

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.

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.

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*, *Prospect*, *Resseller*, 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.

Bug Tracker Releases

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.

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.

Mass Email Manager

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 prospects. 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. 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, From Address, User Name who created the email, Send On date, Send Attempts, and In Progress status. The Mass Emailing Queue Manager only displays emails created through email campaigns and does not include emails created using the Email module.

To delete an email that is waiting to be sent, click the check box next to the email and click the Delete button. Click Check All to select all the emails in the list.

Setting Up EmailMan

EmailMan processes emails that are scheduled to be sent from within Campaigns. The template emails are sent to the recipients from a PHP script that must be run on regular intervals to send out the emails at the appropriate time. The user can choose the email template from the Campaigns module as well as the sender name, sender email address (recommended to be no-reply@<your company.com>.or something similar), and the time and date to send the email.

When an email is processed, a link is appended to the end of the email for recipients to opt out of receiving emails. This will link back to a page on the same machine as your Sugar instance.

To use EmailMan, you must first correctly configure the email settings as described in Configure Settings section. EmailMan uses the same email server connection settings. Notifications do not necessarily have to be turned on, but the settings must be properly configured for recipients to properly receive emails.

Second, EmailMan requires a scheduling program to run the PHP script. For Microsoft Windows, you can use the Task Scheduler. For UNIX, you can use cron. Examples for both are below.

Setting Up the Mass Emailing Cron Job on UNIX

As a root user, type the following command at the shell prompt, replacing the 'path-to-sugarcrm' with your own path to the Sugar Suite installation directory and replacing the 'apache' with the proper username that the web server runs as (usually defaults to 'apache'):

```
/echo "0,10,20,30,40,50 * * * * cd /<path-to-sugarcrm>;  
<path-to-php> ./emailmandelivery.php" | crontab -u apache/
```

This sets up a cron job to check every 10 minutes for whether any emails need to be sent out. If any do, EmailMan will process the template and send an email out immediately to the recipient.

For more information about how to specify different times for running the cron job, see the man page of cron:

```
/man 5 crontab/
```

Setting Up the Task Scheduler on Microsoft Windows

As a user with Administrator privileges, go to Start > Settings > Control Panel > Scheduled Tasks. Double-click on 'Add Scheduled Task'. When the Scheduled Task Wizard asks you for the program you want Windows to run, browse for the '/emailmandelivery.php/' file under your 'path-to-sugarcrm' directory. Continue with the rest of the Wizard, making sure you click on the 'Daily' option when asked when to perform this task.

Before you click on the Finish button for the Scheduled Task Wizard, check the box that says, 'Open advanced properties for this task when I click Finish.' A new dialog box displays after you click Finish. Click on the 'Schedule' tab and then on the 'Advanced' button. Check the box for 'Repeat task' and specify every 10 minutes with a duration of 24 hours.

Inbound Email

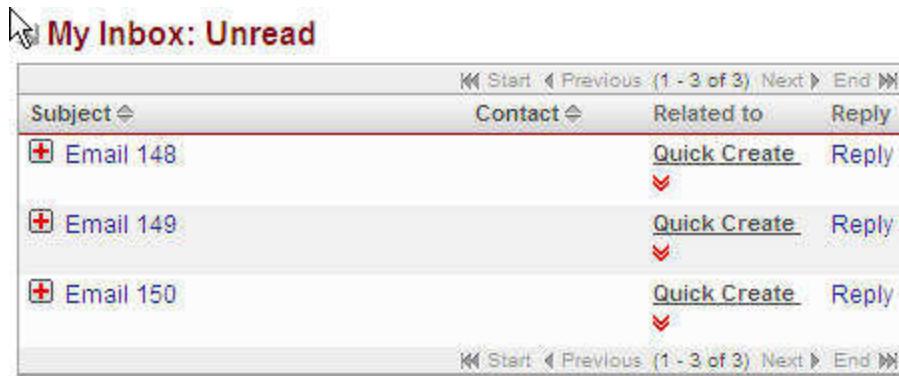
This section describes Inbound Email processing. Inbound Email provides the capability to monitor, route, assign, and reply to emails. Multiple mailboxes can be monitored, such as support@company.com or sales@company.com. Items contained in these email boxes can be parsed and associations made to applicable 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 can:

- 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 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 > Manage Mailboxes > Monitor New Mailbox.

My Inbox

The following illustration shows a user's My Inbox list:



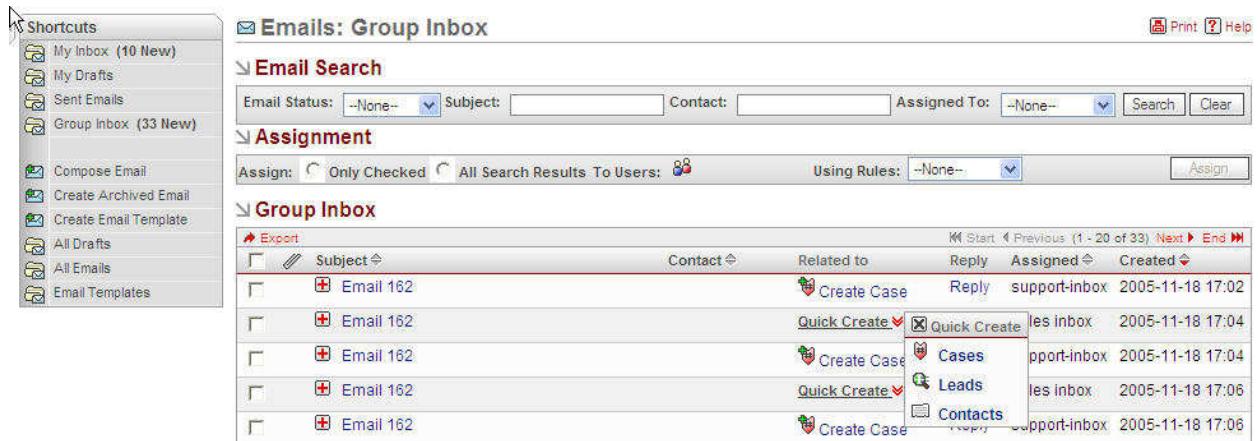
The screenshot shows a list of three unread emails in the 'My Inbox: Unread' view. The columns are Subject, Contact, Related to, and Reply. Each email has a red plus sign icon next to it. The first two emails have a downward arrow icon below them.

Subject	Contact	Related to	Reply
Email 148		Quick Create	Reply
Email 149		Quick Create	Reply
Email 150		Quick Create	Reply

Figure 77: My Inbox

Group Inbox

The following illustration shows a Group Inbox containing items from monitored mailboxes:



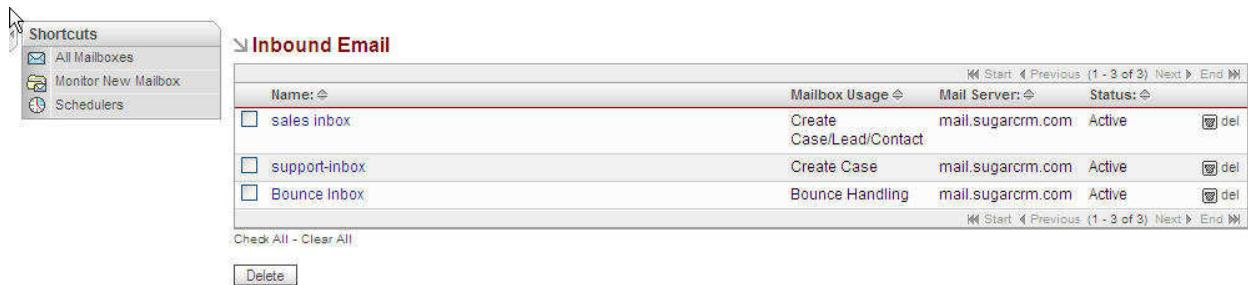
The screenshot shows a 'Group Inbox' view with a sidebar containing shortcuts like My Inbox, My Drafts, Sent Emails, and Group Inbox. The main area has sections for Email Search and Assignment. The Group Inbox table lists five emails, each with a checkbox, subject, contact, related to, reply, assigned to, and creation date.

Group Inbox					
Subject	Contact	Related to	Reply	Assigned to	Created
Email 162		Create Case	Reply	support-Inbox	2005-11-18 17:02
Email 162		Quick Create	Quick Create	sales-Inbox	2005-11-18 17:04
Email 162		Create Case	Quick Create	Cases	2005-11-18 17:04
Email 162		Quick Create	Quick Create	Leads	2005-11-18 17:06
Email 162		Create Case	Quick Create	Contacts	2005-11-18 17:06

Figure 78: Group Inbox

Managing Mailboxes

The following illustration shows three monitored email inboxes in Admin > Inbound Email > Manage Mailboxes.



The screenshot shows a 'Manage Mailboxes' view under 'Inbound Email'. The sidebar includes links for All Mailboxes, Monitor New Mailbox, and Schedulers. The main table lists three mailboxes: sales inbox, support-inbox, and Bounce inbox, with columns for Name, Mailbox Usage, Mail Server, and Status.

Name	Mailbox Usage	Mail Server	Status
sales inbox	Create Case/Lead/Contact	mail.sugarcrm.com	Active
support-inbox	Create Case	mail.sugarcrm.com	Active
Bounce inbox	Bounce Handling	mail.sugarcrm.com	Active

Figure 79: Monitored Email Inboxes

Inbound Email Setup

The following illustration shows the basic Email setup, mail server options, and Email handling options for the Bounce Inbox. 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.

Inbound Email Setup: Bounce Inbox

Basic Setup

- Name: * Bounce Inbox
- Status: Active
- Incoming Mail Server: * mail.sugarcrm.com
- Login User Name: * agent1@sugarcrm.com
- Mail Server Protocol: * IMAP
- Password: * [REDACTED]
- Monitored Folder: * INBOX

Mail Server Options

- Leave Messages On Server:
- Validate Certificate:
- Use SSL:
- Use TLS:

Email Handling Options

- Possible Actions: Bounce Handling
- Auto-Reply Template: -None-
- Assign To Group: Bounce Inbox
- "From" Name: [REDACTED]
- "From" Address: [REDACTED]

Figure 80: Inbound Email Setup

Setting up Mailbox Management

To set up Mailbox Management, 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.

Sharing Calendar Information

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:

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.

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SUGAR SUITE TM

Sugar Open Source

User and Administrator's Guide

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