



Contact Preference

Overview

- Download the latest .tgz package here: <https://github.com/sugarcrlabs/ContactPreference/releases/latest>
- Load the package in your target instance using Module Loader
- Log in as an admin user
- Go to Studio and view the Fields for the Contacts module
- You will see two new custom fields that have been added automatically. 'Contact Status' and 'Contact Preference'. 'Contact Status' is a field of type 'do_not_call_image' that shows an icon representing what is selected in the field 'Contact Preference'. 'Contact Preference' is a DDLB (drop down list box) field, utilizing a new list definition 'contact_methods_list', representing possible contact options. For example, methods like Mobile, Office, Fax, Skype, etc.
- To use these fields you will have to add them to the desired layouts.
- The Red/Green coloring for Do Not Contact status utilizes the OOTB field do_not_call

Modules other than Contact

- Go to Studio and view the Fields for the desired module
- Add a field of data type 'Do Not Call Image'
- Add a second field of type DDLB, using the list type 'contact_methods_list'
- If you want to use the Red/Green coloring for Do Not Contact status, you will need to add a field of type checkbox and name it do_not_call (Sugar will automatically add a '_c '. This is ok.)
- Then add fields to the needed layouts

Contact fields autopopulated

The needed fields are already added to Contact module by the package.

preferred_language	Language Preference	DropDown
mkto_sync	Sync to Marketo®	Checkbox
mkto_id	Marketo Lead ID	Integer
mkto_lead_score	Lead Score	Integer
email	Email	Email
* dnc_image_c	Contact Status	Do Not Call Image
* pref_c	Contact Preference	DropDown
* latitude_c	latitude	TextField
* longitude_c	longitude	TextField

* field created in Studio

Modules other than Contact

For other modules just add a field as shown below, with the field name as **do_not_call**. Then add the other fields as shown in Contacts (Preference and Status)

Data Type: ⓘ

Field Name:

Display Label:

System Label:

Help Text:

Comment Text:

Default Value: ☐

Calculated Value: ☐ ⓘ

Dependent: ☐ ⓘ

Reportable: ☒

Audit: ☐

Allow Imports: ⓘ

Duplicate Merge: ⓘ

* ob_13_c	ob 13	Checkbox
* ob_21_c	ob 21	Checkbox
* ob_21_meeting_c	ob 21 meeting	Checkbox
* ob_case_c	ob case	Checkbox
* ob_case_closed_c	ob case closed	Checkbox
* do_not_call_c	Do Not Call	Checkbox
* latitude_c	latitude	TextField
* longitude_c	longitude	TextField

* field created in Studio

List View Config

Add whatever fields you want to see in the List View. To work correctly though you must have all fields at least in the Available column. This is so Sugar has access to those fields' data at runtime.

List View

[Home](#) | [Studio](#) > [Contacts](#) > [Layouts](#) > List View

Save & Deploy

View History

Restore Default Layout

Default

Contact Status

[dnc_image_c]

Name

[full_name]

Title

[title]

Account Name

[account_name]

Email

[email]

Office Phone

[phone_work]

User

[assigned_user_name]

Date Modified

[date_modified]

Date Created

[date_entered]

Available

Contact Preference

[pref_c]

Do Not Call

[do_not_call]

Hidden

[portal_app]

Language Preference

[preferred_language]

Campaign

[campaign_name]

Sync to Mail Client

[sync_contact]

Sync to Marketo®

[mkto_sync]

Marketo Lead ID

[mkto_id]

Lead Score

[mkto_lead_score]

Tags

[tag]

Teams

[team_name]

Customer Journey Template

[dri_workflow_template_name]

latitude

[latitude_c]

longitude

[longitude_c]

Record View

Record view fields look as follows



Ruth Jacobs



Follow



Edit

Title

VP Operations

Mobile

809 - 531 - 9521

Department

Operations

Do Not Call



Account Name

[White Cross Co](#)

Email

ruth.jacobs@aol.com

Tags

Contact Preference

Phone

Contact Status



Click to edit

[Show more...](#)

Record View Edit

Users can enter a reason for Do Not Contact (DNC) by clicking Contact Status Icon.

Contact Status

Company closed for holidays

Contact Status



Company closed for holidays

List View









If a reason for DNC has been maintained, it will appear on mouse over of red icon. If contact type is Email, user can click on the Email icon to open an Email drawer.

Contacts (20 of 21+)

Create »

Filter Create Search by first name, last name...



<input type="checkbox"/>	<input type="checkbox"/>	Contact Status	Name	Title	Account Name	Email	Office Phone	User	Date Modified	Date Created	Settings
<input type="checkbox"/>	<input type="checkbox"/>		Ruth Jacobs	VP Operations	White Cross Co	ruth.jacobs@aol.c...	196 - 876 - 7932	Regina Lazlow	2017-01-31 05:10...	2017-01-03 06:29...	 ▼
<input type="checkbox"/>	<input type="checkbox"/>	 Company closed for holidays	Marie Pierce	Director Operations	White Cross Co	marie.pierce@outl...	999 - 418 - 0703	Regina Lazlow	2017-01-31 05:04...	2017-01-03 06:29...	 ▼
<input type="checkbox"/>	<input type="checkbox"/>		Doris Wheeler	IT Developer	White Cross Co	doris.wheeler@ao...	024 - 619 - 4451	Regina Lazlow	2017-01-31 05:04...	2017-01-03 06:29...	 ▼
<input type="checkbox"/>	<input type="checkbox"/>		Joyce Wagner	VP Operations	White Cross Co	joyce.wagner@ho...	751 - 805 - 0848	Regina Lazlow	2017-01-31 05:04...	2017-01-03 06:29...	 ▼

Click for Email drawer