

Contact Preference



Overview

- Download the latest .tgz package here: https://github.com/sugarcrmlabs/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

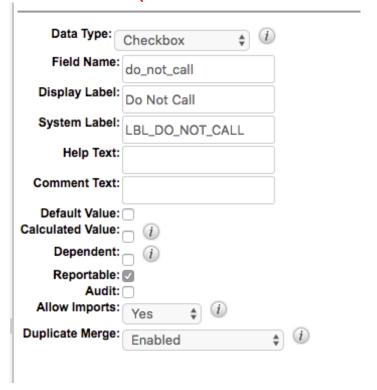
The needed fields are already added to Contact module by the package.

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
* longitude_c * field created in Studio	longitude	TextField



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)

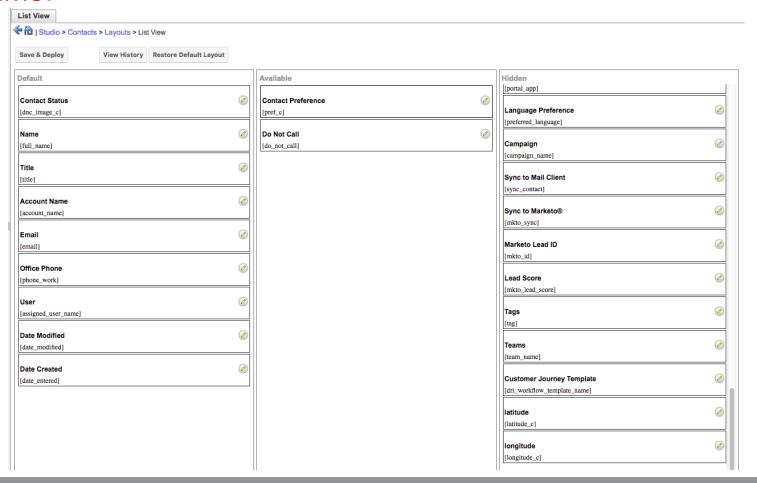


* ob_13_c	ob 13	Checkbox
* ob_21_c	ob 21	Checkbox
* ob_21_meeting_c	ob 21 meeting	Checkbox
* ob_case_c	ob case	Checkbox
* ob_case_closed_c	ob case closed	Checkbox
* do_not_call_c	Do Not Call	Checkbox
* latitude_c	latitude	TextField
* longitude c	longitude	TextField



List View Config

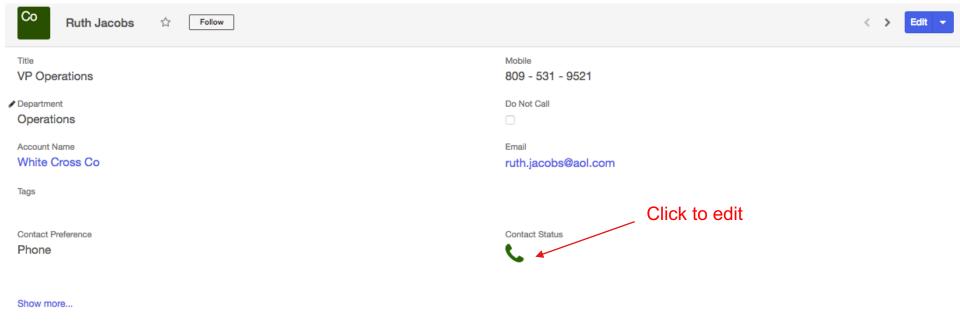
Add whatever fields you want to see in the List View. To work correctly though you must have all fields at least in the Available column. This is so Sugar has access to those fields' data at runtime.





Record View

Record view fields look as follows





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.

