# Sugar Open Source
# User Guide

Version 4.5.1

*Sugar Open Source User Guide*
Version 4.5.1, 2007



www.sugarcrm.com

Original version authored by the Long Reach Corporation.

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## Disclaimer



## Trademarks

# Contents

# Preface

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

Sugar Suite enables organizations to efficiently organize, populate, and maintain information on all aspects of their customer relationships. It provides integrated management of corporate information on customer accounts and contacts, sales leads and opportunities, plus activities such as calls, meetings, and assigned tasks.The system seamlessly blends all of the functionality required to manage information on many aspects of your business into an intuitive and user-friendly graphical interface.

The system also offers a graphical dashboard to track the sales pipeline, the most successful lead sources, and the month-by-month outcomes for opportunities in the pipeline.

Sugar Suite is based on an open source project, and therefore, advances quickly through the development and contribution of new features by its supporting community.

Welcome to the community!

## About this Guide

The *Sugar Open Source User Guide* is designed for users who are new to Sugar Suite, or to CRM and Web-based applications. This guide introduces you to some basic CRM concepts and helps you get familiar with the Sugar Suite system. It describes how to access Sugar Suite through a personal computer and a Web browser to perform a broad range of customer relationship management tasks.

Readers are not required to have any programming or software development knowledge, but should be generally familiar with the use of a personal computer and an Internet browser such as Microsoft Internet Explorer or Mozilla Firefox.

## Audience

The *Sugar Open Source User 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.

# Overview

Sugar Suite consists of modules, each of which represents a specific functional aspect of CRM such as Accounts, Activities, Leads, and Opportunities. For example, the Accounts module enables you to create and manage customer accounts, and the Activities module enables you to create and manage activities related to accounts, opportunities, etc. These modules are designed to help you manage customer accounts through each step of their life cycle, starting with generating and qualifying leads to customer support and resolving reported bugs. Because many of these steps are interrelated, each module displays related information. For example, when you view the details of a particular account, the system also displays the related contacts, activities, opportunities, and bugs. You can not only view and edit this information but also create new information.

As an administrator, you have the power to implement access control for these modules. You can customize the look and feel of Sugar Suite across your organization. You can even create new modules if needed. You can also create multiple forums as platforms of discussion on various topics amongst your users and customers.

## Core Features

### Sales Management

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

### Marketing Automation

- Lead Management for tracking and cultivating new leads.
- Email Marketing for touching prospects and customers with relevant offers.
- Campaign Management for tracking campaigns across multiple channels.
- Campaign Reporting to analyze the effectiveness of marketing activities

### Collaboration

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

### News Service

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

### Administration

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

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

### Interface Consolidation

The Portal module allows administrators and users to link external web sites and web applications into the Sugar 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 4.5.1

With each revision of the Sugar Suite software, significant advances are made in both the feature set and usability of the software. Some of the highlights of version 4.5 are detailed below.

### Campaign Management

Sugar now offers the following features for campaigns:

- You can now create Newsletter campaigns. A Newsletter campaign is an email campaign that you can send out on a regular basis.
- The new Campaign Wizard allows you to create an email campaign, a newsletter campaign, or other types such as mail and telesales campaigns.
- The new email campaign diagnostic tool allows you to ensure that all the campaign requirements have been met such as email setup, bounce-handling mailbox, and a scheduled job to send out the campaign emails. The diagnostic tool allows users to have a quick understanding of the pending administrative tasks before scheduling the campaign.
- Sugar now provides an embedded ROI report that allows you to view the Return on Investment (ROI) for a campaign based on opportunities generated from the campaign.
- You can create a Web-to-Lead form within Sugar Suite. Users can drag and drop fields from the leads table, including custom fields, and create a ready to use Web-to-Lead form.
- You can now link to campaigns from Leads, Contacts, and Opportunities modules.
- You can now embed images in campaign emails to avoid them from getting reported as spam.

### Reports

- You can search for reports and view reports on the tracker located above the Shortcuts menu.
- You can now run reports for multiple modules that are related to each other. The limitation of one related module is not applicable in 4.5.1 Beta.

- Sugar Suite now supports inner and outer joins in reports. Hence, you can now create queries to include, optionally, information from related modules when applicable.
- You can now run a report with multiple groupings of data.
- You can now select the ANY or ALL filter for reports with multiple queries.

### Module Loader

The Module Loader has been enhanced to allow you to download modules and upgrades from the Server or from your local drive. You can also download new themes, language packs, and dashlets.

## Related Documentation

Refer to the following guides for related information:

- *Sugar Administration Guide*: Describes how to configure and manage the Sugar application.
- *Sugar Installation Guide*: Describes how to install Sugar Suite.
- *Sugar Offline Client Installation Guide*: Describe how to install and use the Sugar Offline Client.
- *Sugar Plug-in for Microsoft Word*: Describes how to install and use the Sugar Plug-in for Microsoft Word.

# Chapter 1

# 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.

Topics include:


- **"Technical Requirements" on page 5**
- **"Accessing Sugar Suite" on page 6**
- **"Setting Your Preferences" on page 7**
- **"Security Timeout" on page 11**
- **"Managing Your Password" on page 12**


## Technical Requirements

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

1. Install and run a current Web browser on your computer.

   Sugar Suite has been successfully tested on the following browsers.

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

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

2. Enable JavaScript and cookies support on 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 as follows:

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

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

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

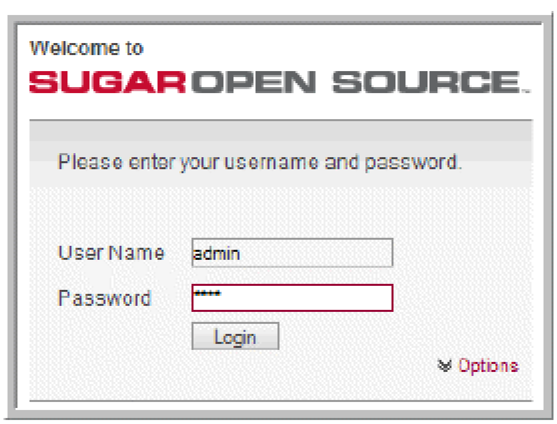
## Accessing Sugar Suite

You access Sugar Suite through a Web browser.

**To log into the system:**

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

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




2. Enter your user name and password.

   Your system administrator assigns 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 cannot log in, take one of the following actions as appropriate:

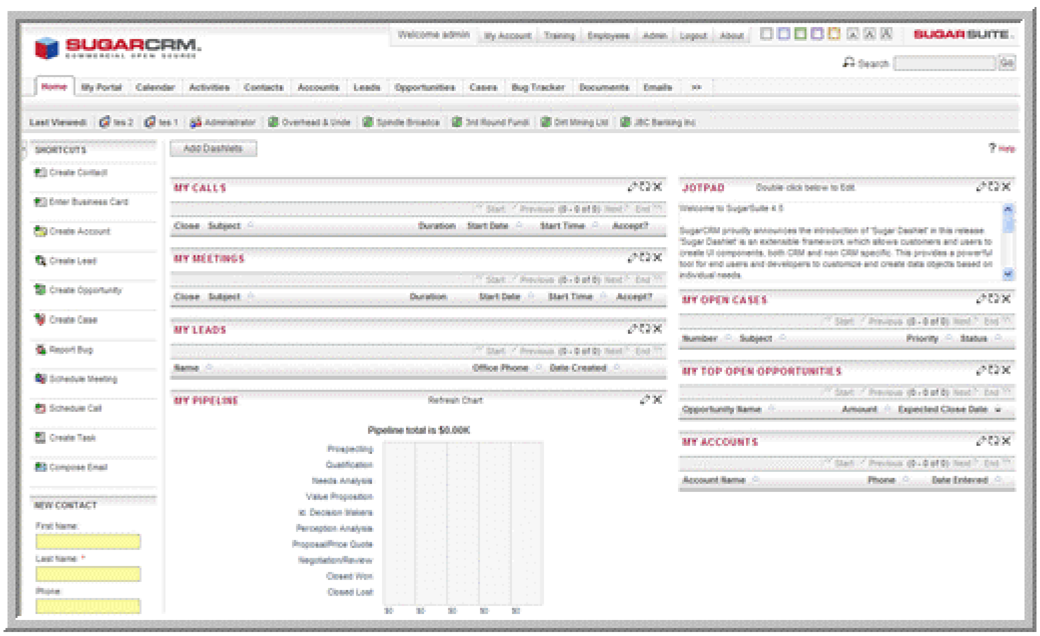
- Verify that the user name and password are correct, including any capital letters.
- Verify with your system administrator that you have the correct user name and password.
- Contact your system administrator to ensure that your account has not been disabled.

3. To choose a different language or Sugar theme, click **Options**, and select from the drop-down lists.

   Before you change the language, ensure that you installed the appropriate language pack. Languages and themes can be found at http://www.sugarforge.org

4. Click the **Login** button.

   The SugarCRM home page displays. The figure below illustrates the default Sugar theme.



# Setting Your Preferences

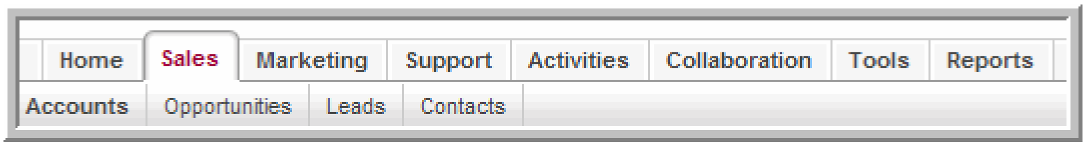
Typically, the administrator configures the system settings for all users in the organization. This includes user profile information, password, email settings, calendar settings, as well as specifying the module tabs to display to all or some users in the organization.

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

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

By default, individual module tabs display in the user interface. However, if you are using the Sugar theme, you can display group tabs instead. Group tabs, configured by the administrator, organizes module tabs into groups according to your organization's requirements. For example, the tabs for contacts, leads, and opportunities can be displayed under the Sales group tab. You can choose to display individual module tabs or group tabs. See **"Layout Options" on page 10** for more information.

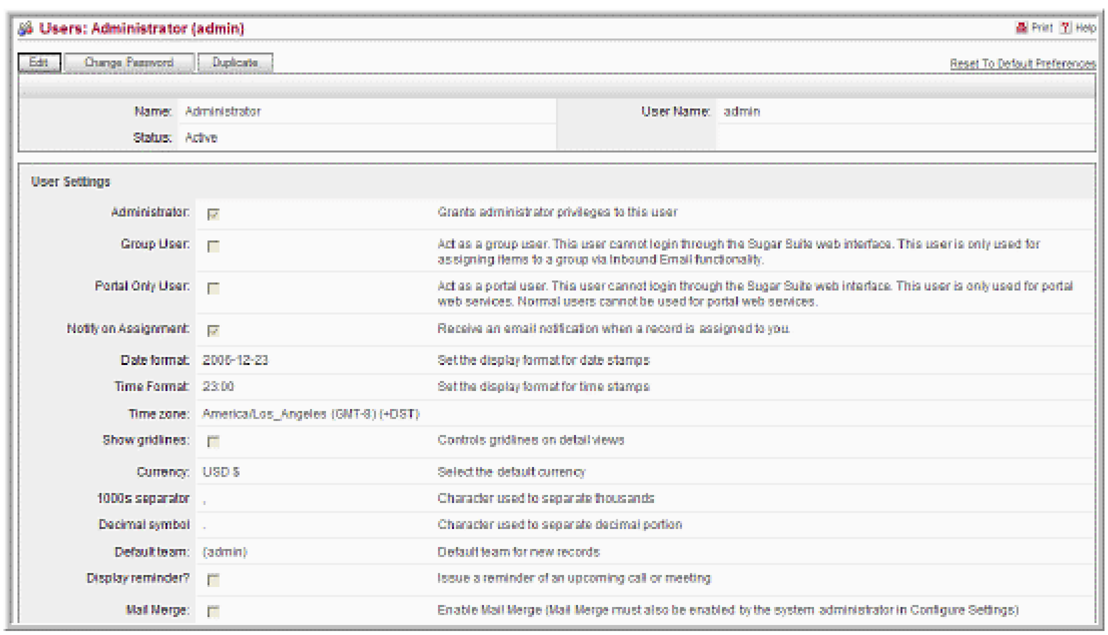
The screen below displays the default group tabs and the module tabs grouped under the Sales group tab.




To revert to the default system settings, you click the **Reset to Default Preferences** link on the My Account page. Note that you will lose your customized settings when you do this.

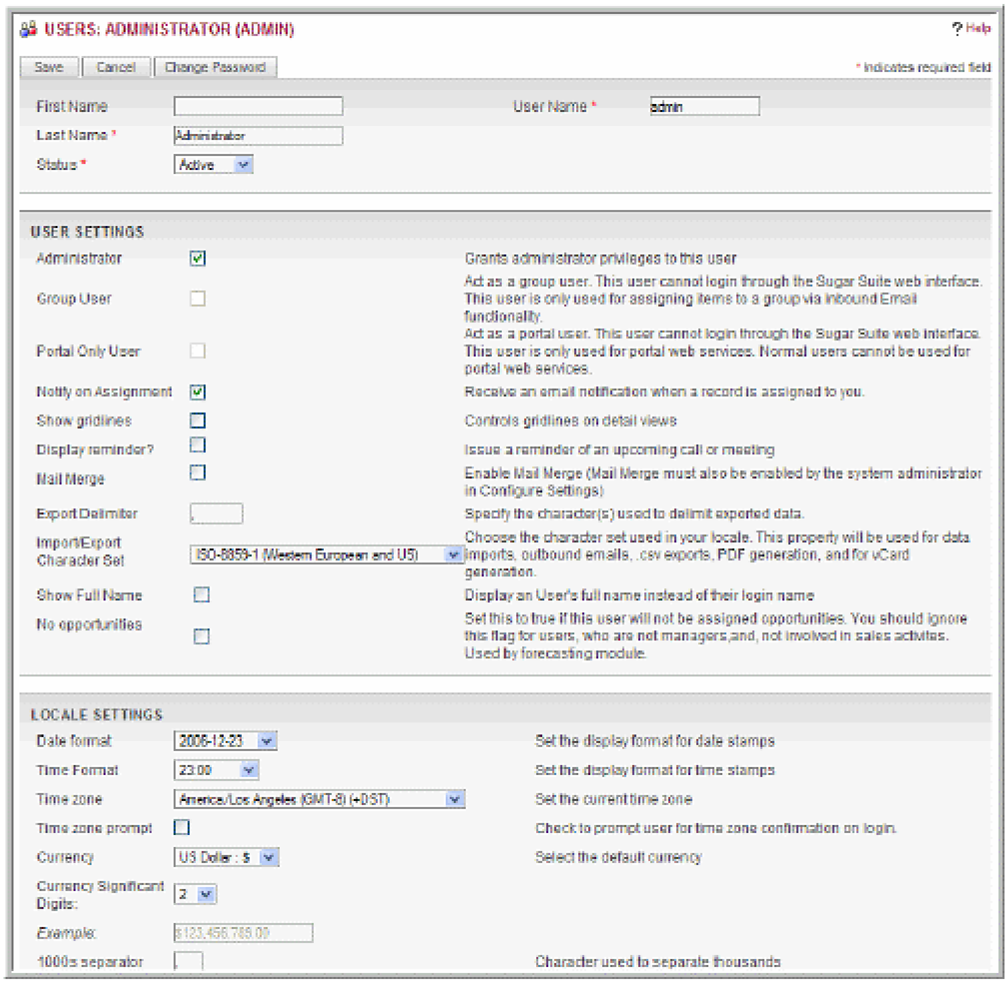
**To set or edit your profile and preferences**

1. Click the My Account link located at the top right side of the page.




The Duplicate button displays only when an administrator logs in because only an administrator can duplicate records. Duplicating records is a quick way to create a new record. You can create a duplicate record and then edit it and save it as a new record.

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




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

**Header Information**

Your header information includes your name, status, and user name

**User Settings**

Use this panel to view your privileges and system settings that the administrator has configured. You can change some settings such as whether you want to be notified when you have been assigned a task.

The administrator sets the default export settings such as the delimiter used to separate data in export files and the default character set used to export data from Sugar Suite. However, you can override the administrator's settings with your own. The default character set to export data is CP1252. If your locale is not US or Western Europe, you must specify the appropriate character encoding for your locale. This ensures that the character set used by the Sugar system to create the exported file is mapped to the correct character set on your machine. For example, MS Windows uses SJIS in Japan. So, users in this locale will need to select SJIS as the default export character set instead of CP1252.

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

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

**Locale Settings**

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

**User Information**

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

**Address Information**

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

**Calendar Options**

Use this panel to create a Publish Key. The system prompts anybody who attempts to publish your calendar for this key.

**Layout Options**

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

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

If you log in as the administrator, you can apply these settings globally by moving the modules from the Hide Tabs list to the Remove Tabs list. Any module in the Remove Tabs list is hidden not only from you but from all users in your organization.

Use the Number of tabs to display box to specify the maximum number of module tabs to display in the User Interface.

**Email Options**

Use this panel to set your email options such as your email address and the email client.

You can choose the SugarCRM mail client, or an external mail client such as Microsoft Outlook. The default is the SugarCRM mail client. In addition, you can select an email format such as HTML or Plain Text. You can also choose to add your signature on your outbound emails.

**Outbound Email Settings**

Use this panel to view or change the mail transfer agent for your outbound emails. You can select either Sendmail or SMTP.

**Inbound Email Settings**

Use this panel to specify mail server information such as its address, protocol, port number, status, user name and password. To ensure that the settings are accurate, click the **Test Settings** button.

Click **Show Advanced** to set the following options:

**Use SSL**. Select this box to use Secure Socket Layer (SSL) when connecting to the mail server.

**Leave Messages on Server**. Select this box to save your inbound messages on the email server instead of the Sugar Suite server.

**Import only since last check**. Select this box to instruct the system to import only email messages that are new since the last time you checked for messages.

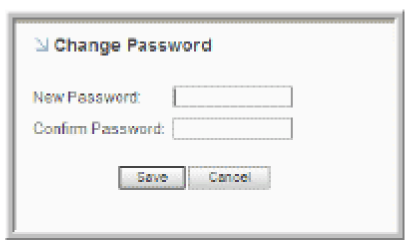
**Note:** Selecting this option could slow down performance because the server will check every message to ensure that you have not already read it.

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

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

**To change your password**

1. Click the **My Account** link to view your User page.
2. Click the **Change Password** button to view the Change Password dialog box.




3. Enter information for the following fields:

   **New Password:** Enter the new password.

   **Confirm Password**: Reenter your new password.

4. Click **Save** to save your changes; click **Cancel** to exit the dialog box without changing your password.

# Security Timeout

For security reasons, the system automatically logs you out of the system if you do not perform any tasks for a specified period of time. This timeout period is determined by two factors:

- The lifetime of the PHP Session Cookie (PHPSESSID). The default lifetime is until the browser is closed.
- The PHP session timeout period. The default value is 1440 seconds (24 minutes).

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

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

# Managing Your Password

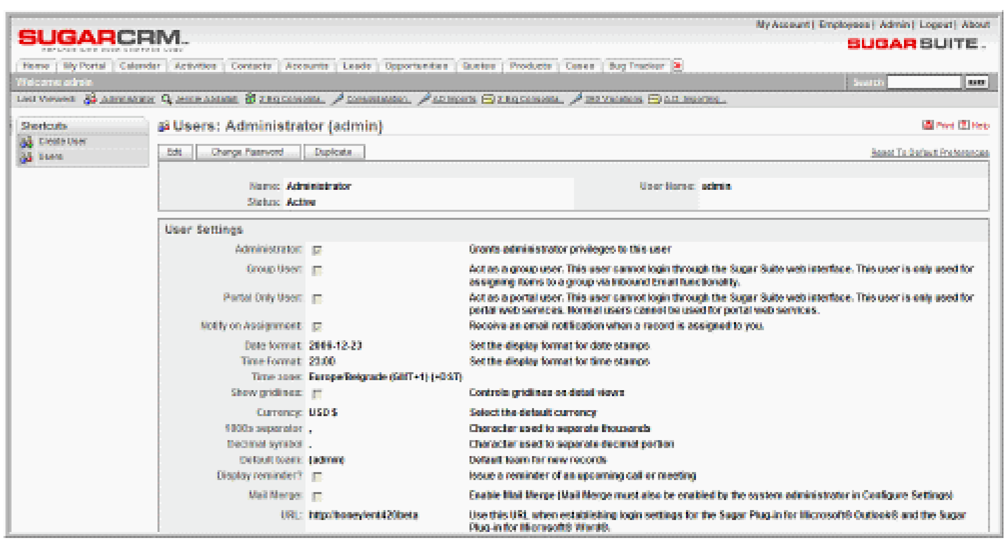
When you are first granted access to the system, your administrator will provide you with a password. For security reasons, it is recommended that you change this password. Ensure that you choose a password that is easy for you to remember, but difficult for others to guess.

You can change your password at any time. For security reasons, it is recommended that you change your password periodically.

**To change the password**

1. Log into Sugar Suite and click the My Account link that displays at the top right of your screen.
2. On the My Account screen, click **Change Password**.
3. In the Change Password dialog box, enter your new password in the New Password box, and again in the Confirm Password box.
4. Click the **Save** button to save your changes.

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



# Chapter 2

# Navigating the Sugar Suite User Interface

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

Topics are as follows:

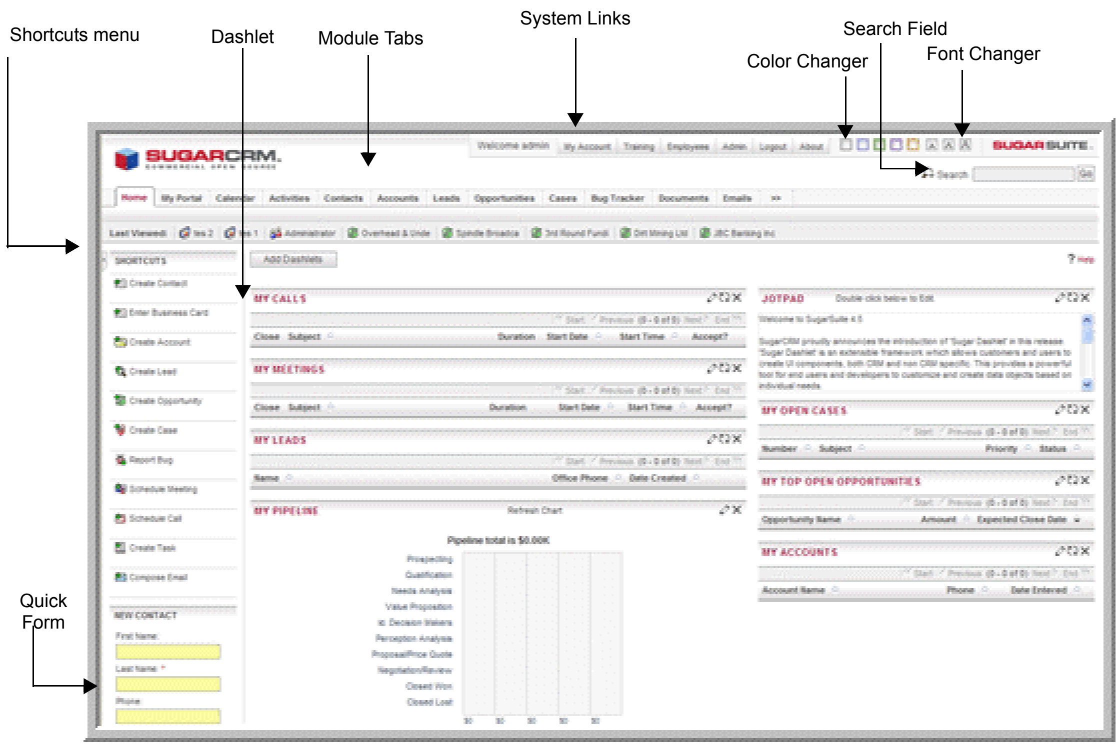


## Overview of the User Interface

The Sugar Suite user interface consists of various modules designed to help you manage customer-related records such as contacts and accounts. Each module, representing a record type, groups the tools and functions needed to perform specific tasks. This enables you to work more efficiently.

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

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




The Home module displays the following:

- **System links**. System links, located at the top right-hand corner of the page, are common to most modules. They allow you to access your profile information, Sugar University, the employee list in your organization, Sugar Suite version information, and log out of the system. Administrators can view and access the Administration Home page to perform their tasks. For more information, see **"System Links" on page 15**.
- **Module tabs**. Module tabs allow you to access a module to view, create, and manage records. For more information, see **"Sugar Suite Modules" on page 15**.
- **Last Viewed links**. These links provide a trail of pages that were lasted viewed. For more information, see **"Common Module Options" on page 17**.
- **Shortcuts**. The Shortcuts menu allows you select options to view, create, and import item records. For more information, see **"Common Module Options" on page 17**.
- **Dashlets**. Dashlets are user-configurable panels on the Home page that allow you to specify the items that you want to view on your home page. For more information, see **"Managing Sugar Dashlets" on page 21**.
- **New Contact**. This quick form allows you to enter the required information to create a new contact. For more information, see **"Common Module Options" on page 17**.

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

## System Links

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

**My Account**. Click this link to enter or edit your profile information such as a change in home address, email address, or phone number.

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

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

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

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

**Admin**. The Admin link is only visible to users who have administrator privileges. Administrators can select this option to perform tasks such as managing system and user settings.

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

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

Print. Click this icon to print the current page view.

Help. Click this icon to view links to the latest user documentation.

## Sugar Suite Modules

- **Home.** The Home module provides a quick overview of your customer-related tasks and activities. For more information, see **"Home Module" on page 28**.
- **My Portal**. Click this tab to view the My Portal module. You use this module to create shortcuts to one or more Web sites. This is commonly used to include email, forums, or other Web-based applications, enabling Sugar Suite to become a single user interface for multiple applications. For more information, see **"My Portal Module" on page 31**.

- **Calendar**. Click this tab to view the Calendar module. You use this module to view scheduled activities (by day, week, month, or year) such as meetings, tasks, and calls. You can also share your calendar with your coworkers to coordinate your daily activities. For more information, see **"Calendar Module" on page 33**.
- **Activities**. Click this tab to view the Activities module. You use this module to create or update scheduled activities, or to search for existing activities. Activities consists of the following:
  - **Calls** allow you to track all of your phone calls with leads and customers.
  - **Meetings** allow you to schedule internal or external meetings, as well as receive meeting invitations from others.
  - **Tasks** are for tracking any action that needs to be managed to completion by a due date.
  - **Notes** allow you to capture note information as well as upload file attachments.
  - **Emails** allow you to archive sent or received email messages. If you use Microsoft Outlook, you can quickly archive email messages with the Sugar Plug-in for Outlook.

  For more information, see **"Activities Module" on page 36**.
- **Contacts**. Click this tab to view the Contacts module. You use this module to track people involved in doing business with your organization. You can track a variety of contact information such as title, email address, and phone number. Contacts are usually linked to an account, although this is not required. For more information, see **"Contacts Module" on page 43**.
- **Accounts**. Click this tab to view the Accounts module. You use this module to manage your customers. You can track a variety of information about an account including Web site URL, address, number of employees and other data. Business subsidiaries can be linked to parent businesses in order to show relationships between accounts. For more information, see **"Accounts Module" on page 48**.
- **Leads**. Click this tab to view the Leads module. You use this module to track individuals or companies who are potential customers. Leads are typically fed into the Sugar Suite system automatically from your Web site, trade show lists or other methods. However, you can also manually enter leads into Sugar Suite. For more information, see **"Leads Module" on page 52**.
- **Opportunities**. Click this tab to view the Opportunities module. You use this module to track potential customers. Opportunities help you manage your selling process by tracking attributes such as sales stages, probability of close, deal amount and other information. For more information, see **"Opportunities Module" on page 55**.
- **Cases**. Click this tab to view the Cases module. You use this module to manage product problems and inquiries by tracking information for each case such as its status and priority, the user assigned, as well as a full trail of all related open and completed activities. For more information, see **"Cases Module" on page 58**.
- **Emails**. Click this tab to view the Emails module. You use this module to send and receive emails and create email templates that can be used with email-based

marketing campaigns. You can also save email drafts and archive emails for your records. For more information, see **"Emails Module" on page 66**.

- **Bug Tracker**. Click this tab to view the Bug Tracker module. You use this module to report and track bugs associated with a product. Customer support representatives can manage software-related support problems or inquiries to completion by tracking information for each bug such as its status and priority, its resolution, the user assigned, the release of software involved, its type (defect or feature) as well as a full trail of all related open and completed activities. For more information, see **"Bug Tracker Module" on page 60**.
- **Documents**. Click this tab to view the Documents module. You use this module to view a list of documents that you can download. You can also upload your own documents, assign publish and expiration dates, and specify which users can access them. For more information, see **"Documents Module" on page 63**.
- **Campaigns**. Click this tab to view the Campaigns module. You use this module to create and manage marketing campaigns. You can implement and track marketing campaigns. Campaigns may be telemarketing, mail or email-based. For more information, see **"Campaigns Module" on page 74**.
- **Projects**. Click this tab to view the Projects module. You use this module to track and manage tasks for multiple projects. Tasks can be assigned to different users and assigned estimated hours of effort. As tasks are in progress and completed, users can update the information for each task. For more information, see **"Projects Module" on page 95**.
- **RSS**. Click this tab to view the RSS (RDF Site Summary) module. Use this module to view and manage news and other Web content syndicated by Web sites. View the latest headlines provided by your favorite RSS feeds. These feeds provide news or other web content that is distributed or syndicated by Web sites. The system provides hundreds of RSS feeds, and you can easily add others. For more information, see **"RSS Module" on page 98**.
- **Dashboard**. Click this tab to view the Dashboard module. Use this module to view a chart of your opportunities pipeline. For more information, see **"Dashboard Module" on page 99**.
- **Forums**. Click this tab to view the Forums module. Use this module to create one or more forums to discuss general, technical, or sales topics. For more information, see **"Forums Module" on page 101**.

## Common Module Options

All modules display most of the following options:

**Search Box**: The bar below the module tabs displays a Search box. You can use this box to enter a text string to perform a keyword search for data stored in Sugar Suite. To perform an advanced search with more filters, click the Advanced Search link below the Search box. For more information, see **"Searching for Information on Sugar Suite" on page 23**.

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

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

**Create/New form**: A quick entry form to create a new record for the module. This form differs from the Create option displayed in the Shortcuts menu because it only displays required fields that have default values assigned to them. This is because the system uses the default values where available. When you save the new record, you can change the default values if necessary and add information for the optional fields.

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

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

# Viewing and Managing Record Information

Every module represents a module type such as accounts or opportunities. Sugar Suite provides three types of views for every module: A list view, a detail view, and an edit view.

**List view**: The list view displays, in table format, links to individual records. The list view also displays other relevant information such as names, email addresses, phone numbers, and account names for each record. You can click a record name to drill down to its detail information. You can click the view icon to navigate to the detail view and the Edit icon to navigate to the edit view, if you have edit permissions. The system paginates long lists. To sort the list, click any column title which has the icon beside it; to reverse the sort order, click the column title again.

**Detail view**: The detail view displays the detail page with all the available information for a record such as name, modified date, and related records. The related records are displayed in the appropriate sub-panels. For example, an opportunity's detail page lists sub-panels for Activities, Leads, and Threads. The detail page provides options to edit, delete, and duplicate record information. Similarly, you can edit and delete records in sub-panels. You can also create a new record or select from an existing list.

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

**To view and edit record information**

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

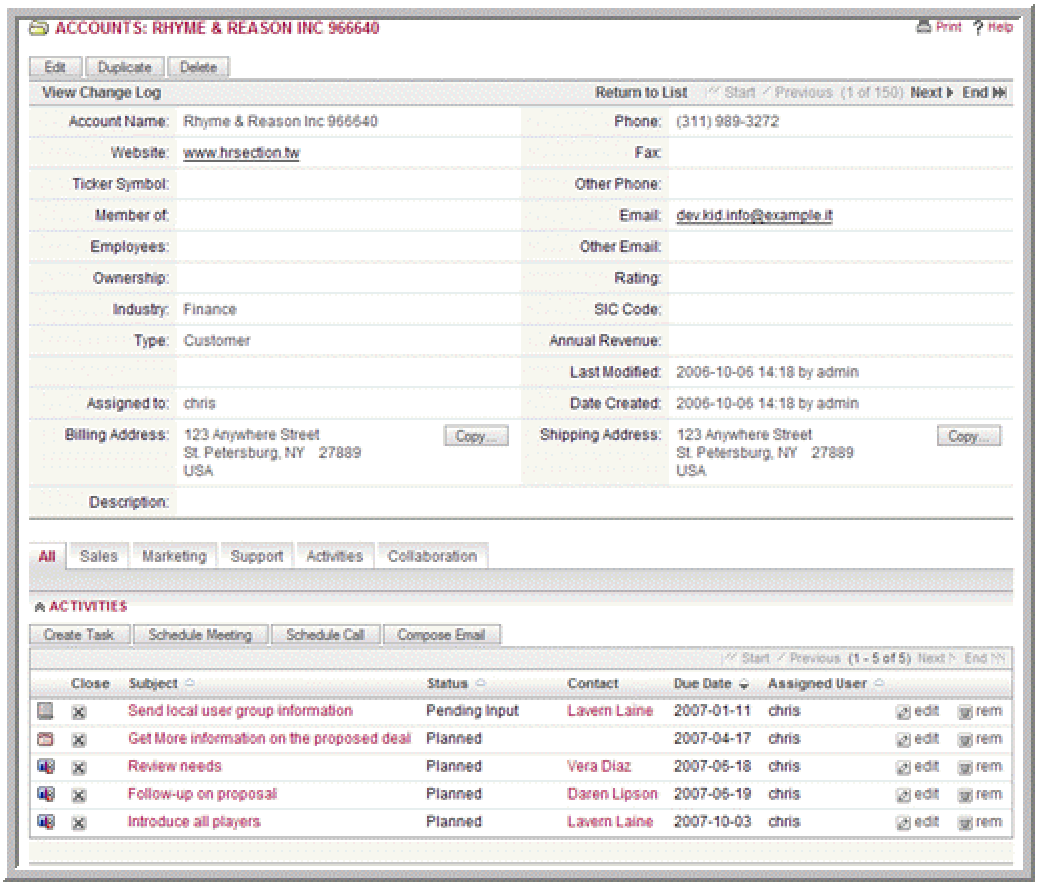
   The address displays in the Additional Details popup window. In this window, you can click the **View** icon to navigate to the record's detail page, or click the **Edit** icon to navigate to the record's detail page and edit the information.

   Alternatively, click the record name on the list to navigate to the detail page where you can view the record details.

2. Click **Edit** to change field values on the Edit page.

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

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




**To manage related information in sub-panels**

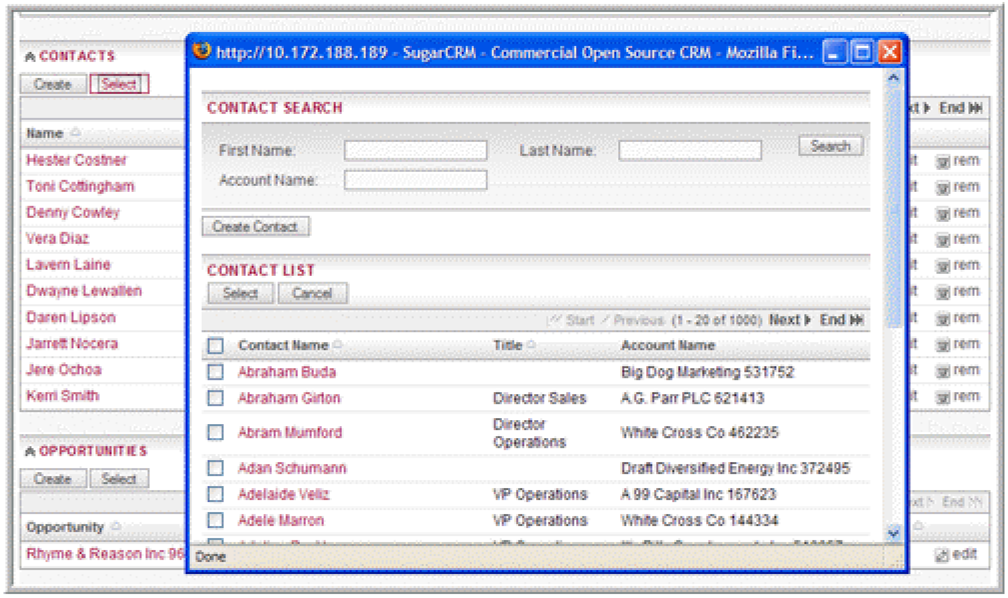
1. To create a new record, click **Create** above the sub-panel; To choose a record from an existing list, click **Select** above the sub-panel.

   A list of available records for the sub-panel displays in a separate window.

2. To select one or more records from the list, click the box adjacent to the record name and then click **Select**.

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

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




## Tracking and Managing Record History

The detail page of every record displays a History sub-panel that enables you to track related activities such as meetings, notes, attachments, and archived emails. Each row in the panel displays icons to edit or remove the record. You can also use this sub-panel to create and record new activities.

**To track and manage record history**

1. To view the details of a listed note, meeting, attachment, or email, click the Subject title.
2. To view a summary of all the listed records in a separate window, click **View Summary**.
3. To edit or delete a record, click the appropriate edit or rem icon respectively.
4. To archive an email related to the record, click **Archive Email**. For more information, see **"Archiving Emails" on page 69**.

## Editing and Deleting Multiple Records

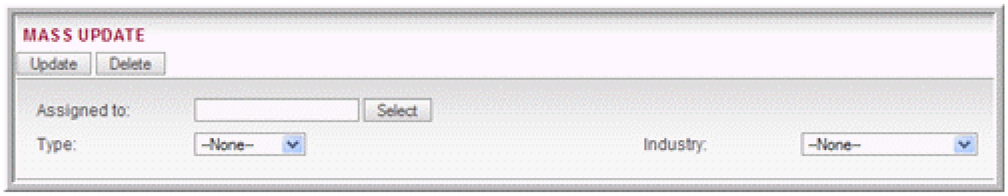
Most of the modules provide a Mass Update sub-panel on their Home page that enables you to simultaneously edit or delete some or all of the listed records. This feature is useful to update information shared by several records. The fields that you can edit vary depending on the module. For example, in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

**To edit or delete multiple records**

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

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

   The system updates the information in all the selected records.




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

   The system deletes the record from the module.

# Managing Sugar Dashlets

Dashlets are user-configurable panels on the Home page that allow you to specify the items that you want to view on your home page. A dashlet displays a list of item records that is similar to the list view displayed on a module's home page. Sugar Suite displays a collection of dashlets for items such as meetings, activities, and accounts on your home page. You can configure each dashlet to display the rows, columns, and filters that you need. For example, you can change a dashlet's title or choose to view only your items. You can add and remove dashlets as needed.

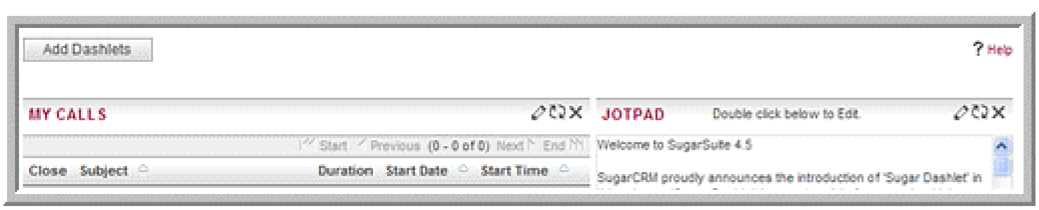
You can add multiple dashlets of the same kind. For example, you can add multiple activities dashlets and configure each one differently. By default, you can add a maximum of 10 dashlets on your home page, but the administrator can change this setting. You can also move a dashlet to different locations on the page as required.

**Note:** If you cannot add or move dashlets, check with the administrator to ensure that the functionality has been enabled.

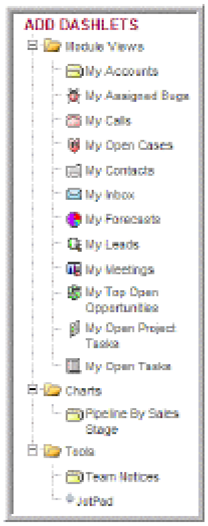
Developers can extend its functionality to provide users with additional capabilities.

**To add a dashlet**

1. On the Home module, click **Add Dashlets**.



2. The available dashlets display on the left.




3. Click a dashlet name to add it to your Home page. Each time you click the name, a new dashlet is added on the page.

**To manage dashlets**

1. To move a dashlet, place the cursor on its title, press and hold down the mouse button and move it to the new location, and then release the mouse.
2. To edit a dashlet, click the **Edit** icon above it, update the information, and click **Submit**.
3. To remove a dashlet, click the **Delete** icon above it. When the system displays a message seeking confirmation, click **OK** to confirm its removal.

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

# Merging Duplicate Records

If you have more than one record for an item, you can merge them to update and clean up your data. You can select which fields you want to merge and when the process completes, the system deletes the duplicate records. This ensures that there is no confusion and that your users are accessing information from only one source. Before the duplicate records are deleted, related information such as activities, history, contacts are moved from the duplicate records to the primary record.

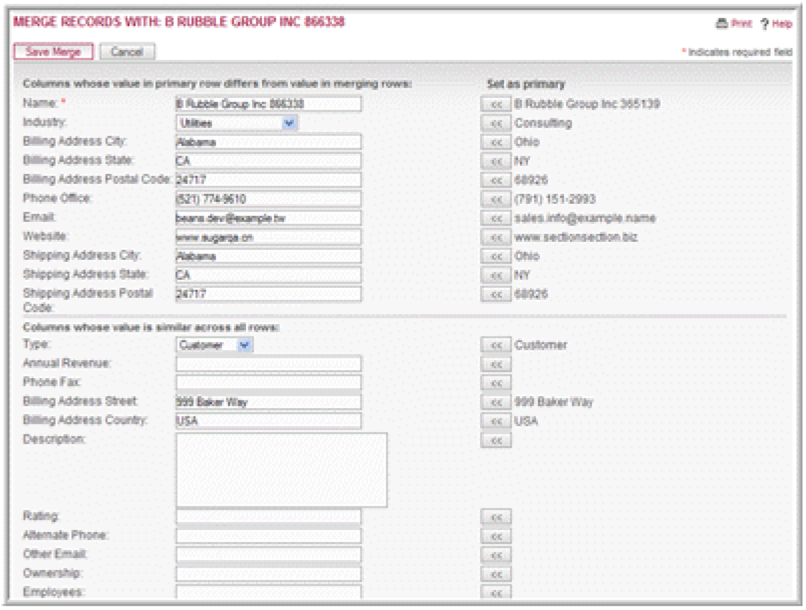
Your can merge duplicate records only in the following modules: Accounts, Contacts, Leads, Opportunities, Cases, and Bugs. You can merge a maximum of five duplicate records at a time.

If you already know of the duplicate records that you want to merge, you can do so from the module's list view. If you need to search for duplicates of a record and then merge them, you can do it from the record's detail view.

**To merge duplicate records from the list view**

1. On the module's home page, select the duplicate records and click the **Merge Duplicates** link.

   The Merge Records page displays fields from primary record on the left and fields from the duplicate records on the right.




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

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

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

      The system moves that record to the left.

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

2. Click **Save Merge**.

   The system merges the selected fields, moves all the related information to the primary record, and deletes the duplicate records.

# Searching for Information on Sugar Suite

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

You can perform the following types of searches in Sugar Suite:

- Global Search
- Basic Search

- Advanced Search

## Global Search

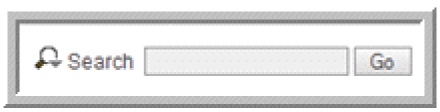
You can perform a global keyword search at the system level for text that matches the beginning of key field names.

All searches in Sugar Suite automatically append the % wildcard search character when searching text fields.

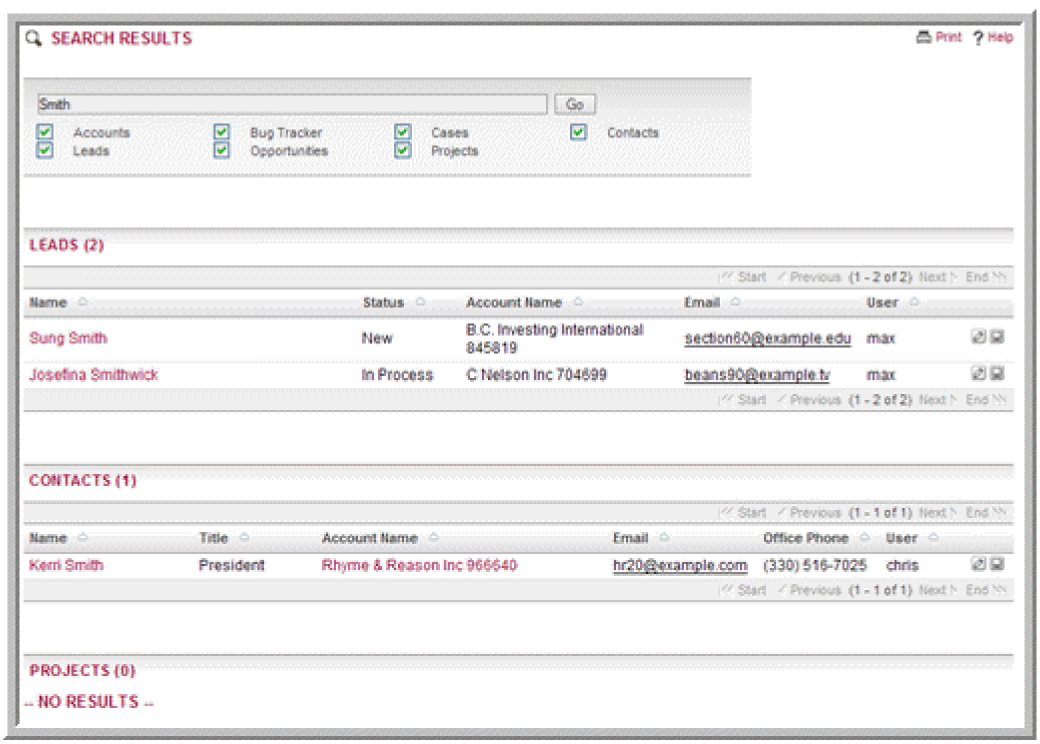
For example, searching for "Acme" will match account names such as "Acme Industries" or "Acme Funds". Searching for "%Acme" will also match account names such as "ABC Acme Industries".

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

To perform a global search, enter the keyword in the Search field and click **GO**.



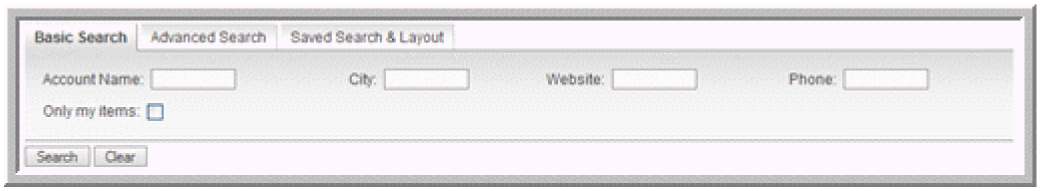

The systems searches Accounts, Contacts, Leads, Opportunities, Cases, and Projects and displays search results for each of these modules. If you want to search only some of these modules, click the down arrow and select the modules in the list and then click GO. The module with the most records displays at the top of the search results page.



## Basic Search

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

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




The search fields are context-sensitive and vary depending upon the module you are searching. When you type a character in a field, the system performs a quick search of possible values and presents a list of values starting with that character. Typing additional characters restricts the resulting list.

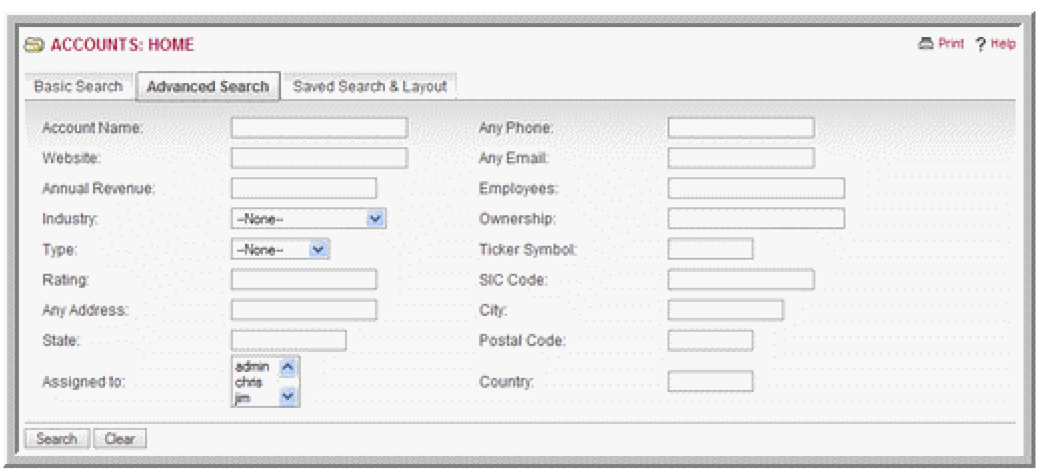
Text entered in search fields needs to match from the beginning of the value stored in each record unless the wildcard character is prepended. If text is entered in more than one search field, then a record must match on all those fields to be included in the filtered list. In other words, searching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

These rules are also applicable to advanced search.

You can edit or delete records in the search results as described in **"To edit or delete multiple records" on page 20**.

## Advanced Search

To further filter the search results, click the **Advanced** tab. The system displays additional fields that vary depending on the module you select.



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

## Saving Search Results

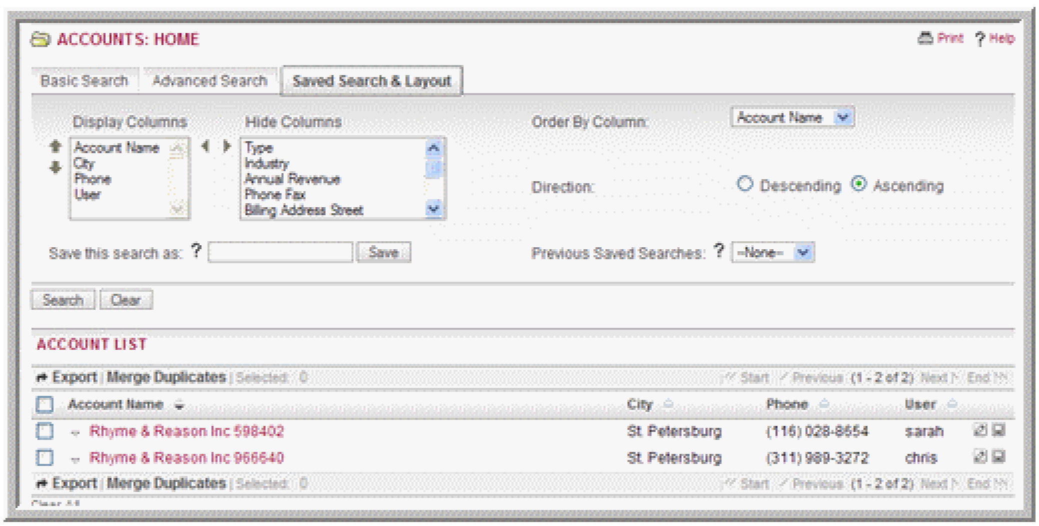
After you perform a search, you can customize and save the layout along with the search results for future use. For example, you can display or hide details such as the record name and assigned user. You can also sort the results in ascending or descending order.

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

**To save and manage search results**

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

   The name now displays in the Previous Saved Views drop-down list and the system displays the search results on the Advanced Search tab.




2. To view a saved search, click the Saved Views tab on the module's Home page and select it the Previous Saved Views drop-down list.

   The system displays the results on the Advanced Search tab.

3. To update a saved search such as changing the order of the records, make the changes on the Saved Views tab and click **Update**.

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

5. To edit or delete multiple records in the search results, use the Mass Update sub-panel as described in **"To edit or delete multiple records" on page 20**.

# Chapter 3

# Using Sugar Suite

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

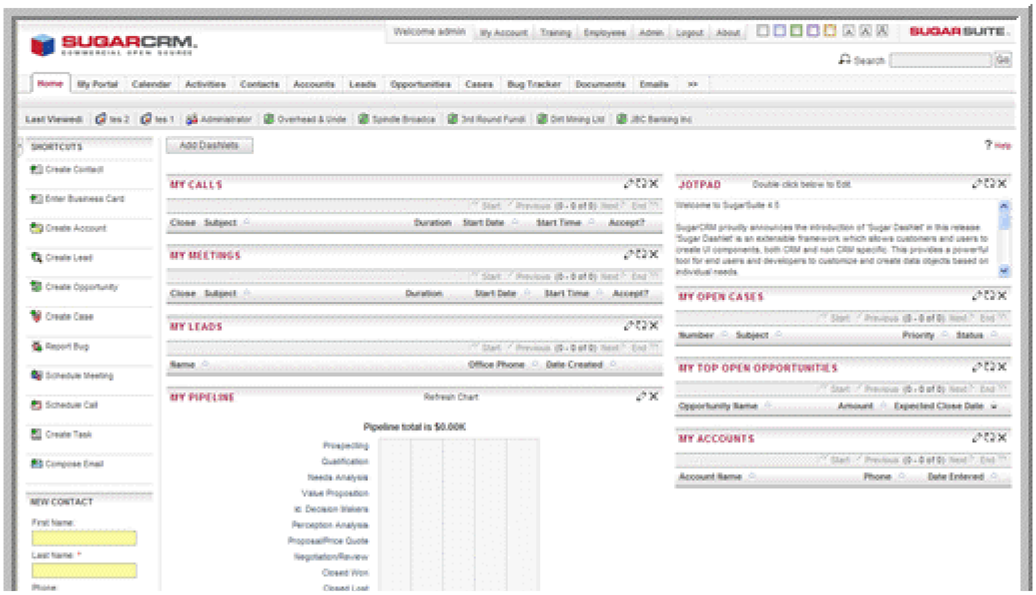
The Sugar Suite application consists of several interlinked modules. Typically, each module represents a specific type of record such as contacts or accounts. For each record type, you can create one or more records. For example, in the Accounts module, you can create individual accounts for your customers.

Each of these modules is described in this chapter.

Topics include:

# Home Module

When you log into Sugar Suite, the Home module page displays. Tabs for other modules display alongside the Home tab.



The Home module displays a Shortcuts menu that you can use to create a new record such as a new contact, account, or opportunity. It also displays a New Contact quick form that you can use to enter required information for creating a new contact. You can add additional information after you save the contact information.

The Home module displays a summary of your customer-related tasks and activities. These are displayed as a collection of dashlets that are user-configurable. You can rearrange dashlets and customize their appearance to suit your requirements. For example, you can change the dashlet title and display or hide a column. You can always revert to the default Home page settings, if needed. Developers can extend dashlets to provide additional capabilities to users.

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

**My Inbox**. Displays unread emails that you received from other users and customers.

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

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

**My Leads**. Displays a list of leads that you created.

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

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

**My Top Open Opportunities**. Lists the top five opportunities sorted by the amount. Opportunities with a status of “Closed-Lost” or “Closed-Won” are not included.

**My Open Tasks**. Displays a list of tasks assigned to you by yourself or other users.

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

**Calendar**. Use it to view and schedule calls, meetings, and tasks.

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

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

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

**To add a dashlet**

1. On the Home page, click the Add Dashlet link.

   The Add Dashlets menu displays in the left panel.

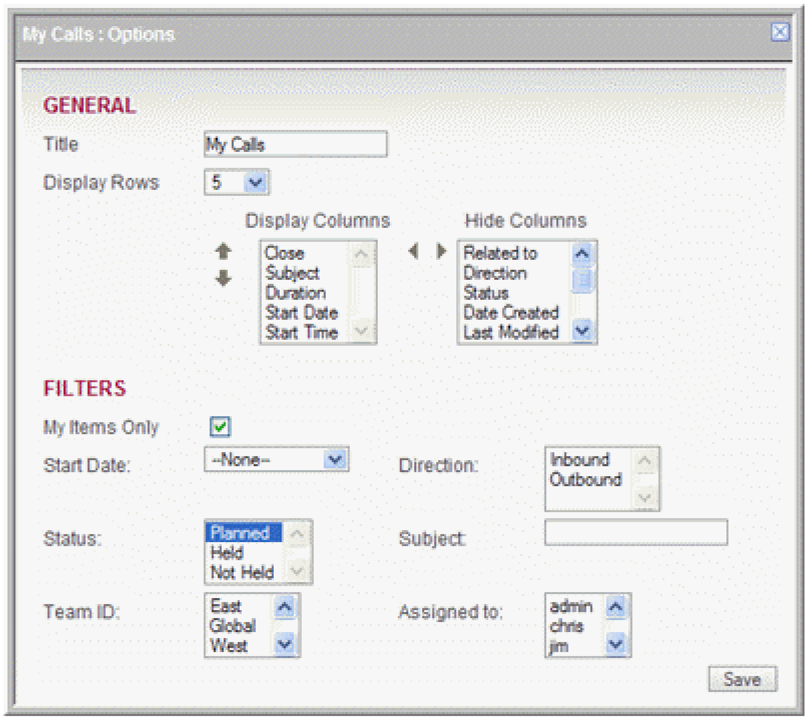
2. Click a dashlet to add it to your home page.

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

**To rearrange and customize dashlets**

1. To rearrange the position of a dashlet on the Home page, point the cursor at the dashlet title, drag it to its new position, and release.
2. To customize a dashlet, click the **Edit** icon adjacent to its name.

The properties dialog box displays.




3. Make the necessary changes and click **Submit**; to exit the Properties dialog box, click outside the box.

**To revert to default Home page settings**

1. Click the My Account option located at the top right-hand corner of the page.
2. Click the Reset To Default Homepage option, and click **OK** to confirm the action.

   The system resets the Home page and logs you out of the system.
3. Log back into the system to view the changes.

# My Portal Module

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

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

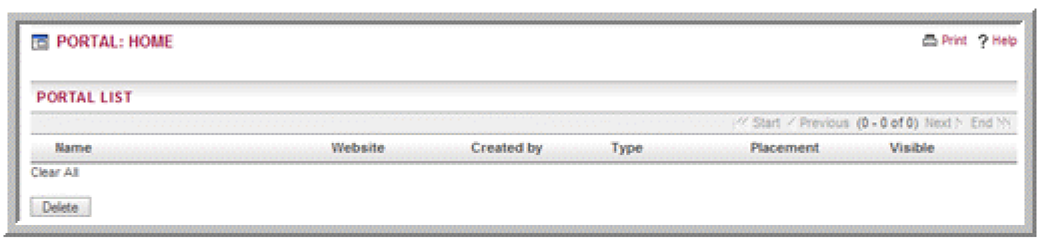
A portal site can display as a shortcuts or as a tab adjacent to the module tabs. Users can display sites only as shortcuts. Administrators can display sites as shortcuts or as tabs.

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

The Shortcuts menu of the Portal home page displays the following options:

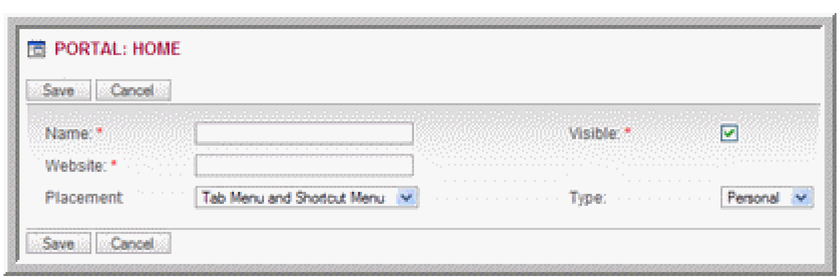
**Add Site.** Click this option to add a portal list as described in "To add a portal site".

**List Sites**. Click this option to view a list of your existing portal sites as described in **"To manage portal sites" on page 32**.




**To add a portal site**

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




2. Enter information for the following fields:

   **Name**. Enter a name for the portal.

   **Website**. Enter the URL for the portal Website.

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

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

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

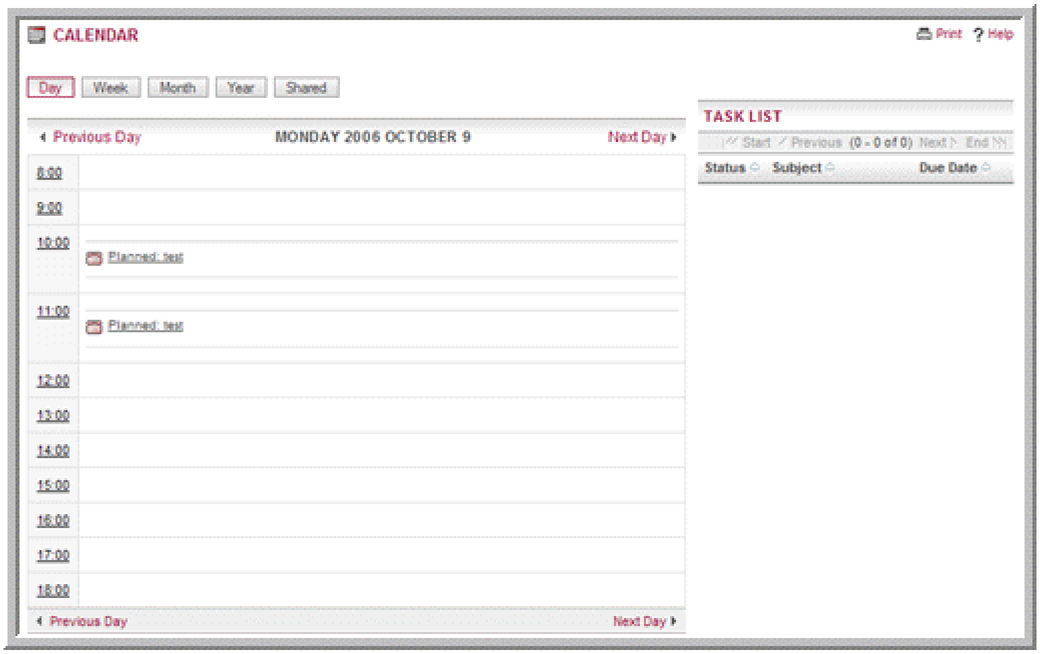
3. Click **Save** to create the portal; click **Cancel** to go back to the Portal home page without creating the new site.

**To manage portal sites**

- To view detailed information on a portal site, click its name in the Portal list.
- To edit information, make the changes on the detail page and click **Save**.
- To view a portal's target web site, click the portal name in the Shortcuts menu.
- To delete a portal site from the list, select the checkbox adjacent to its name in the list and then click **Delete**.
- To navigate back to the Portal home page from a portal site page, click **List Sites** in the Shortcuts menu.

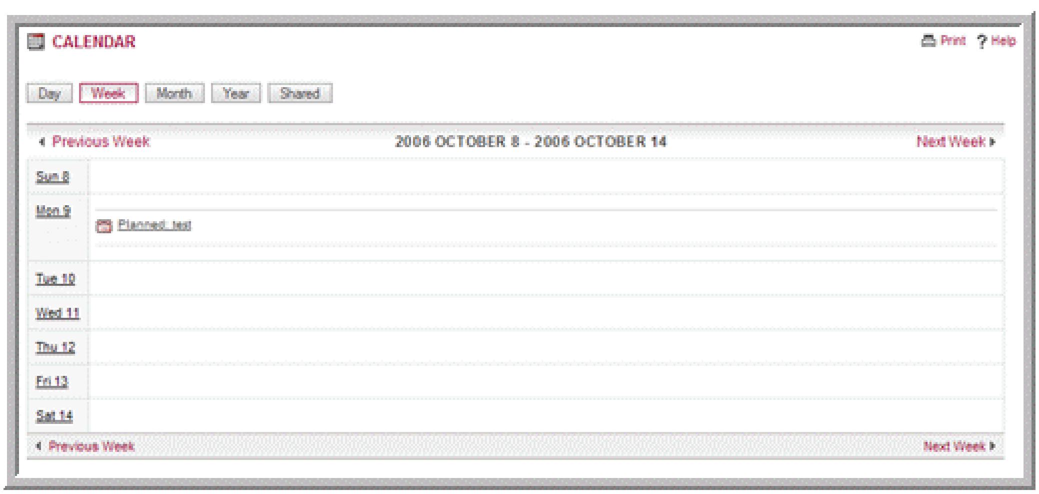
# Calendar Module

Use the Calendar module to view and create appointments, calls, meetings, and tasks.




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

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




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

**Schedule Call.** Click this option to schedule a call as described in **"To schedule a call or a meeting" on page 37**

**Schedule Meeting**. Click this option to schedule a meeting as described in **"To schedule a call or a meeting" on page 37**.

**Create Task**. Click this option to create a task as described in **"To create a task" on page 40**.

**Calls**. Click this option to view and manage calls as described in **"To manage activities" on page 39**.

**Meetings**. Click this option to view and manage meetings as described in **"To manage activities" on page 39**.

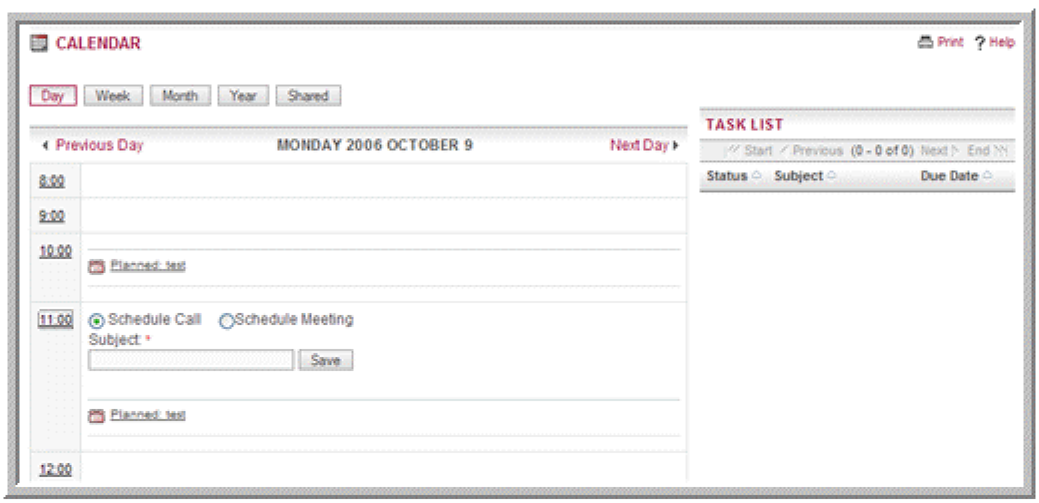
**Tasks**. Click this option to view and manage tasks as described in **"To manage tasks" on page 41**.

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

You can also perform other activities related to a call or a meeting, such as creating a task and archiving emails. For more information, see **"Activities Module" on page 36**.

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

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




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

## Creating Appointments

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

Alternatively, you can use the **Schedule Call** and **Schedule Meeting** options in the shortcut section as described in **"To schedule a call or a meeting" on page 37**.

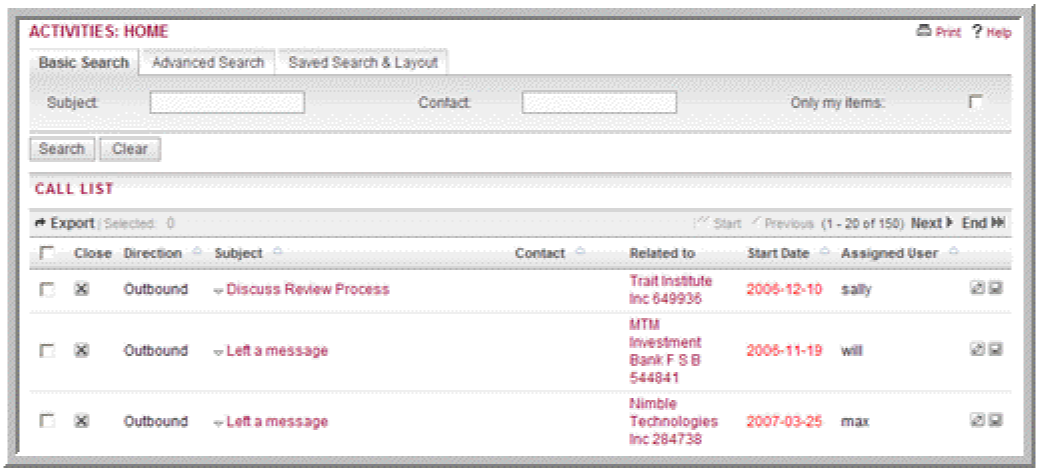
**To create an appointment**

1. In the Create Appointment form, select **Schedule Call** or **Schedule Meeting**.
2. Enter the subject of the call or meeting.
3. Click the Calendar icon and select the scheduled date; enter the time in the **Start Time** field below.
4. Click **Save**.

   The Calls detail page or the Meeting detail page displays the information that you entered.
5. To add or change information, click **Edit**. For more information, see **"To manage activities" on page 39**.

# Activities Module

An activity can be any interaction with colleagues and customers such as phone calls, meetings, and emails. Use the Activities module to schedule and manage calls, meetings and tasks.




The Shortcuts menu displays the following options:

**Schedule Call**. Click this option to schedule a call as described in **"Scheduling Calls and Meetings" on page 37**

**Schedule Meeting**. Click this option to schedule a meeting as described in **"Scheduling Calls and Meetings" on page 37**.

**Create Task**. Click this option to create a task as described in **"Creating Tasks" on page 40**.

**Create Note or Attachment**. Click this option to create a note or an attachment for a call, a meeting, or a tasks as described in **"Creating Notes and Attachments" on page 41**.

**Create Archived Email**. Click this option to copy inbound and outbound emails for archival as described in **"Archiving Emails" on page 69**.

**Calls**. Click this option to view and manage calls as described in **"To manage activities" on page 39**.

**Meetings**. Click this option to view and manage meetings as described in **"To manage activities" on page 39**.

**Tasks**. Click this option to view and manage tasks as described in **"To manage tasks" on page 41**.

**Notes**. Click this option to create or view notes as described in **"Creating Notes and Attachments" on page 41**.

**Emails**. Click this option to view and manage emails your inbound and outbound emails as described in **"To manage inbound emails" on page 68**.

**Today**. Click this option to view your daily appointments in your calendar as described in **"To create an appointment" on page 35**.

**Import Notes**. Click this option to import external data into a note as described in **"To import data" on page 107**.

## Scheduling Calls and Meetings

When you schedule a call or a meeting, you are creating a record about the subject of discussion, the participants, the time period, and the status. After you save this information, you can send out an invitation to all the participants immediately or at a later date. You can create a note or add attachments before or after a call or a meeting occurs. After you complete a call or meeting, or if you cancel it for any reason, you can update its status for the record.

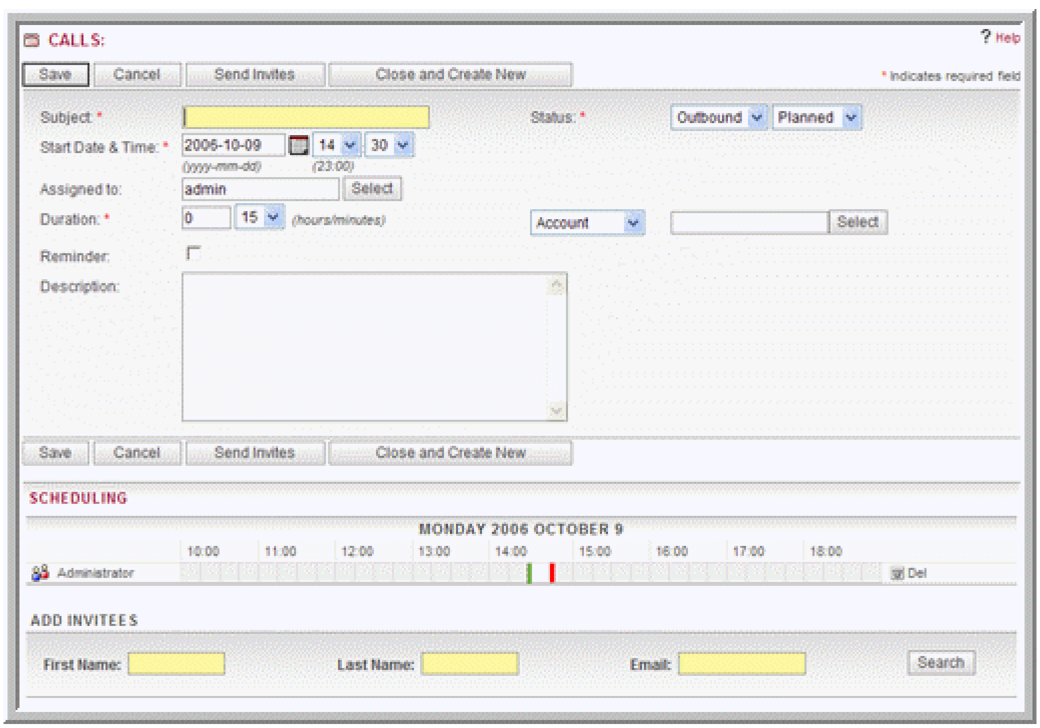
When you create the call or a meeting, the Calls page or the Meetings page displays the following sub-panels:

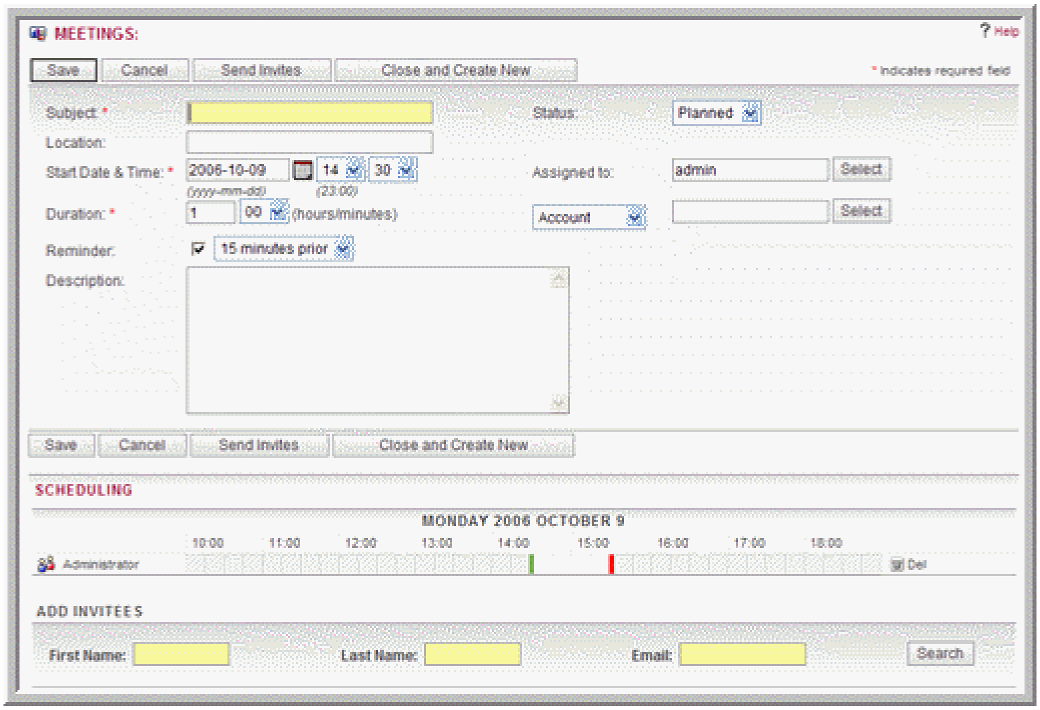
Scheduling. The Scheduling sub-panel displays details such as the name of the attendees, the day, and the time of the call or meeting. If other calls or meetings are scheduled, the busy time is blocked out.

Add Invitees. You can use the Add Invitees sub-panel to find users that you want to invite as described in **"To add invitees" on page 39**.

### To schedule a call or a meeting

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






2. Enter information in the following fields:

   **Subject**. Enter the subject of discussion.

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

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

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

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

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

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

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

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

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

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

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

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

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

3. Click **Save** to save the call information; click **Cancel** to return to the Calls home page or Meetings home page without saving the information.
4. Click **Send Invites** to send out an invitation to the participants.
5. To close the page and create a new call or meeting, click **Close and Create New**.

**To add invitees**

1. In the Add Invitees sub-panel, enter all or any of the following information:

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

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

   **Email**. You can add an alphabet, a whole address, or a partial address.
2. Click **Search**.

   The system displays the search results below with an Add button adjacent to each name on the list.
3. Click the appropriate **Add** button to send an invitation to the user.

**To manage activities**

1. To sort a list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
2. To update information for some or all activities, use the Mass Update section as described in **"Editing and Deleting Multiple Records" on page 20**.
3. To view the details of an activity, click its name on the list. Alternatively, point your cursor on the down-arrow next to the subject to view the Additional Details pop-up window. Click the **View** icon to view the details or the **Edit** icon to edit the details.
4. To edit the information, on the Detail page, click **Edit**, revise the information and click **Save**; click **Cancel** to exit the page without saving your changes.

   Associated information such as contacts, users, and notes are displayed in sub-panels.
5. To duplicate an activity, click the **Duplicate** button in the detail view.

   Duplication is a convenient way of creating a similar activity. You can change the information in the duplicate record to create a new activity.
6. To delete an activity, on the Detail page, click **Delete,** and then click **OK** to confirm the deletion.
7. To find a specific call or meeting in the list, enter the subject or the contact name in the Search sub-panel above and click **Search**. To search only your records, select the **Only my items** box.

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

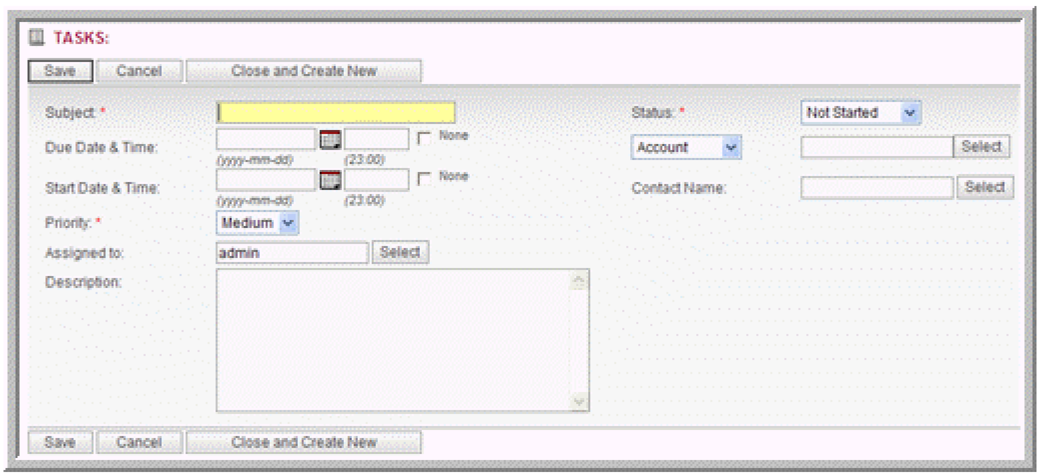
8. To edit an association, click the **edit** icon in the sub-panel, make the changes, and click **Save**.
9. To remove an association, select it and click the **rem** icon; click **OK** to confirm the removal.
10. To edit or delete multiple calls and meetings, use the Mass Update sub-panel as described in **"Editing and Deleting Multiple Records" on page 20**.

## Creating Tasks

Based on your work-related activities, you can create tasks and assign them to yourself or to other users. When you create a task, you can relate it to a specific item such as an account or an opportunity. You can also revise the task status and priority at any time to keep your records up-to-date.

**To create a task**

1. In the Shortcuts menu of the Activities Home page, click **Create Task**.




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

   **Subject**. Enter the subject of the task.

   **Due Date and Time**. Optionally, click the Calendar icon and select the completion date for the task; enter the time in the adjoining box. If there is no specific deadline for the task, select the **None** box.

   Enter the due date information if you want to add the task on your calendar to receive a reminder when it is due.

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

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

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

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

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

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

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

**Description**. Enter a brief description of the task.

**To manage tasks**

1. To edit or delete multiple tasks, use the Mass Update section as described in **"Editing and Deleting Multiple Records" on page 20**.
2. To view the details of a task, click its subject.

   The Tasks page displays details such as the subject, due date, and status.
3. To edit the information, on the Detail page, click **Edit**, revise the information, and click **Save**; click **Cancel** to exit the page without saving your changes.
4. To duplicate the information, on the Detail page, click **Duplicate**, make modifications if needed, and click **Save**; click **Cancel** to exit the page without duplicating the task.
5. To delete the task, on the Detail page, click **Delete** and click **OK** to confirm the deletion.

## Creating Notes and Attachments

You can create or import notes related to a specific call, meeting, or task for distribution to participants. Notes enable you to add comments on a subject and maintain a record of discussions pertaining to a call, meeting, or task. You can also attach supporting documents to a note.

**To create a note or attachment**

1. In the Shortcuts menu, click **Create Note or Attachment**.
2. On the Notes page, enter information for the following fields:

   **Contact**. Enter the name of the contact. Click **Select** to choose one from the Contacts list or to search for a contact in the list.

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

   **Subject**. Enter the subject of the note.

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

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

**Save**. Click this button to save the note; click **Cancel** to return to the Notes home page without creating the note.

**To manage notes**

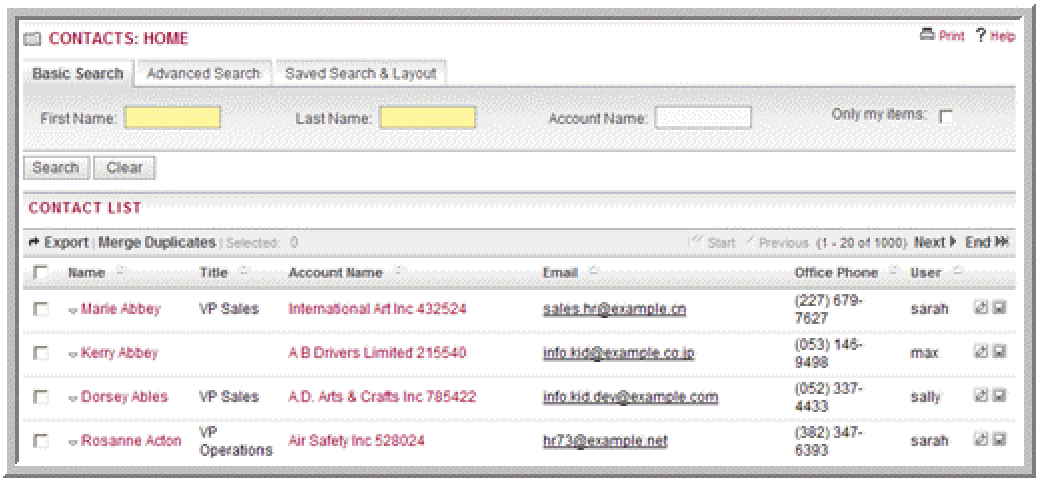
1. To edit or delete multiple notes, use the Mass Update section as described in **"Editing and Deleting Multiple Records" on page 20**.
2. To view the details of a note, click its subject.

   The Notes page displays details such as the subject and date.
3. To edit the information, click **Edit**, revise the information, and click **Save**; click **Cancel** to return to the Notes detail page without saving your changes.
4. To duplicate the information, click **Duplicate**, make modifications if needed, and click **Save**; click **Cancel** to return to the Notes list without duplicating it.
5. To delete the note, click **Delete** and click **OK** to confirm the deletion.

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

# Contacts Module

Use the Contacts module to create and manage contacts for your organization. A contact is any individual who is a valid sales lead; that is, a lead who has been evaluated and assessed. You can associate a contact with any type of campaign to track the effectiveness of the campaign in generating opportunities for your organization.




The Shortcuts menu displays the following options:

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

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

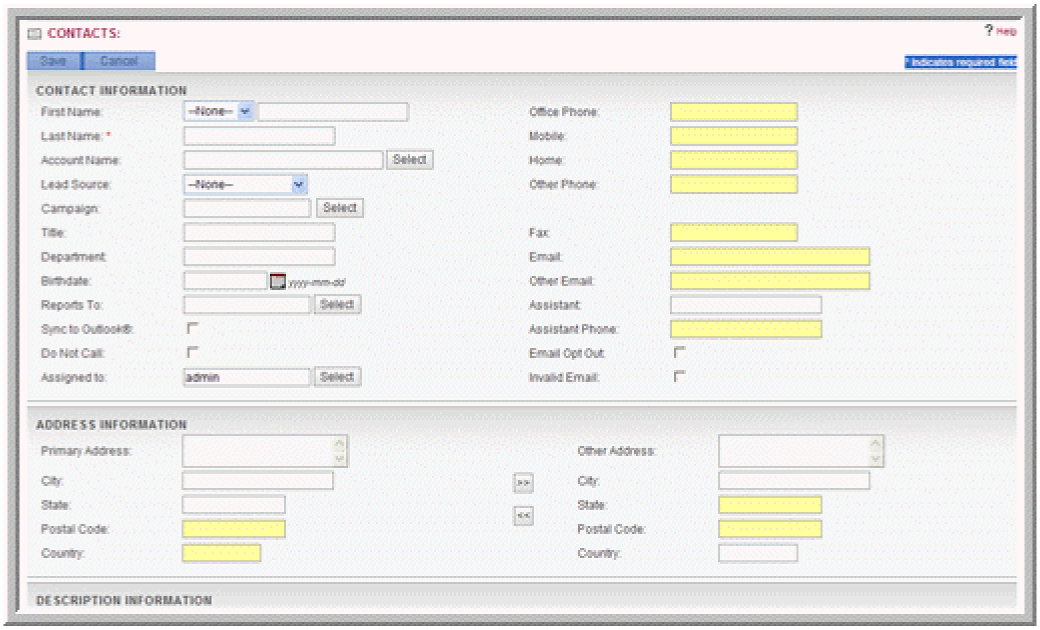
**Create From vCard**. Click this option to import a vCard file from your local system.

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

**Import**. Click this option to import contact information from an external application or file. For more information, see **“To import data” on page 107**

### To create a contact

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




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

   Contact Information

   **First Name**. Enter the contact's first name.

   **Last Name**. Enter the contact's last name.

   **Office Phone**. Enter the contact's work number.

   **Mobile**. Enter the contact's mobile phone number.

   **Home**. Enter the contact's home phone number.

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

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

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

   **Fax**. Enter the contact's fax number.

   **Email**. Enter the contact's email address.

   **Other Email**. Enter the alternative email address, if any.

   **Assistant**. Enter the assistant's name.

   **Assistant Phone**. Enter the assistant's phone number.

   **Email Opt Out**. Check this box if the person does not want to receive your campaign emails.

   **Invalid Email**. Check this box if the person's email address in your records is incorrect.

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

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

**Title**. Enter the contact's business title.

**Department**. Enter the department to which the contact belongs.

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

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

**Do Not Call**. Select this box to add the contact to the Do Not Call list. This is to ensure that the contact is not targeted during campaigns.

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

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

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

Description Information: Enter a brief description for the contact.

Portal Information:

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

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

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

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

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

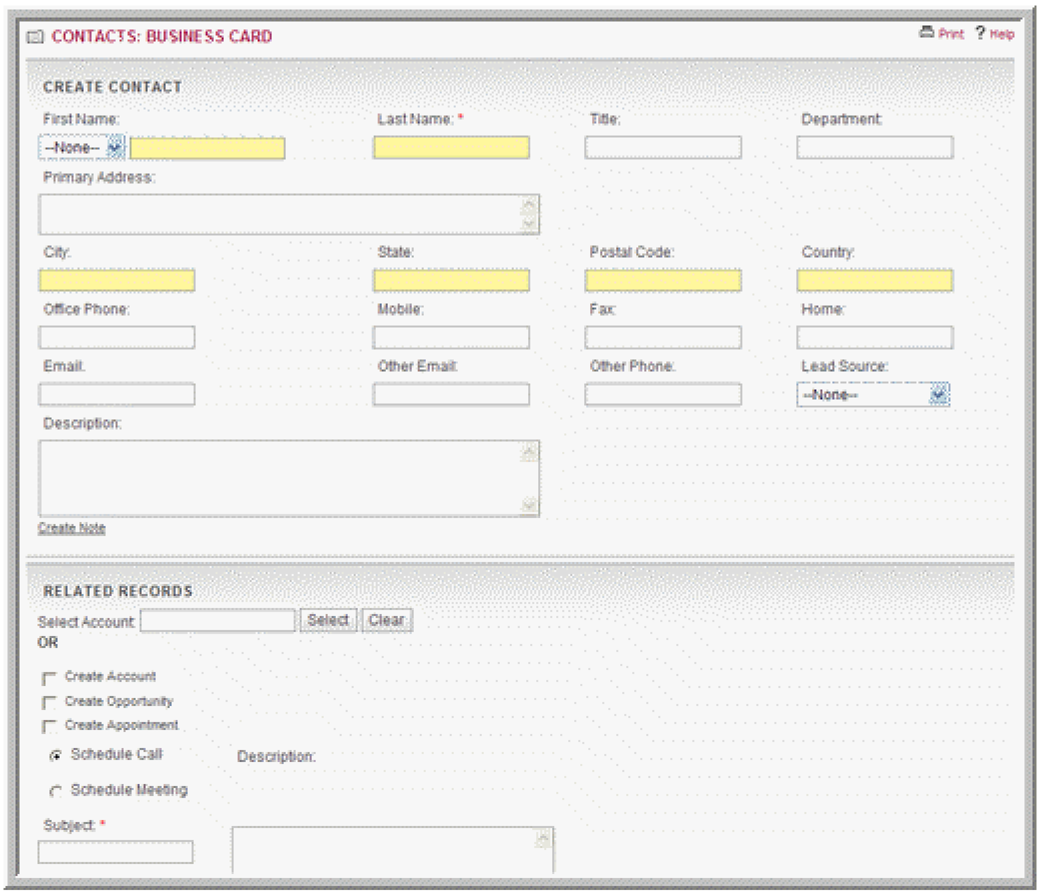
**To view and manage contacts**

- To delete one or more of the listed contacts, use the Mass Update section as described in **"Editing and Deleting Multiple Records" on page 20**.
- To display the detail view for a contact, click on the contact name in the list.
- To export records, click the Export link and follow the process described in **"Exporting Data" on page 110**.
- To merge duplicates, click the Merge Duplicates link and following the process described in **"Merging Duplicate Records" on page 22**.
- To edit contact information, in the detail view, click **Edit**.
- To duplicate contact information, in the detail view, click the **Duplicate** button.
- Duplication is a convenient way of creating a similar contact. You can change the information in the duplicate record to create a new contact.
- To track changes made to contact information over time, in the detail view, click the **View Change Log** link located below the **Edit** button.

- To manage records in a sub-panel, see **"To manage related information in sub-panels" on page 19**.

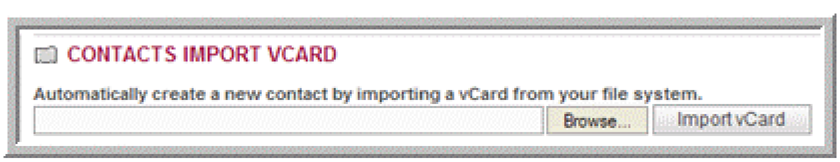
## Creating Business Cards

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




## Creating Contacts From vCards

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




**To import a vCard**

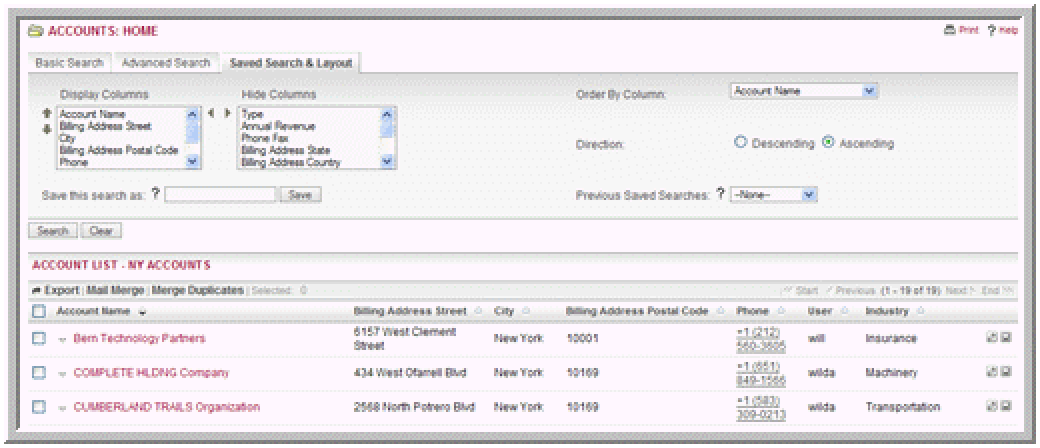
1. In the Shortcuts menu, click **Create from vCard**.

2. On the Contacts Import VCard page, click **Browse** to navigate to the vCard location on the local file system.
3. In the Choose File dialog box, select the file and click **Open**.
4. The file path displays in the **Contacts Import vCard** field.
5. Click **Import vCard**.
6. The information in the vCard displays on a new Contacts detail page.

   The system displays a **vCard** button adjacent to the contact name. You can click this button to open the vCard file and edit the information.
7. To edit the contact information, click **Edit** in the Contacts detail page.
8. To duplicate the information, click **Duplicate** in the Contacts detail page.
9. To delete the information, click **Delete** in the Contacts detail page.

# Accounts Module

Use the Accounts module to create and manage sales accounts for your organization.




The Shortcuts menu displays the following options:

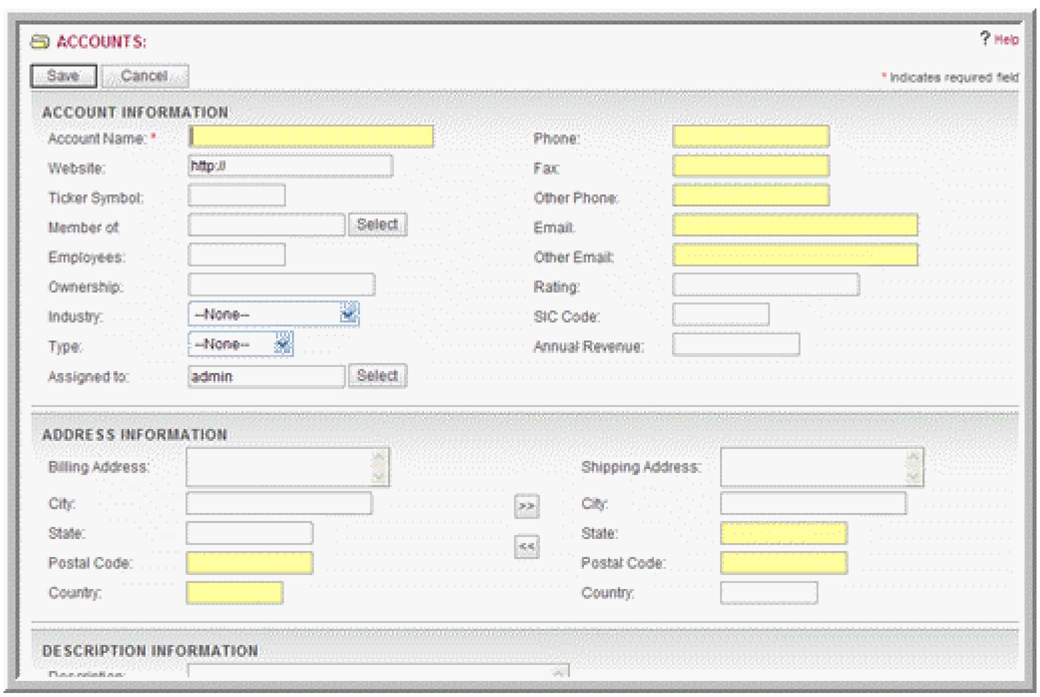
**Create Account**. Click this option to create a new account.

**Accounts**. Click this option to view a list of existing accounts.

**Import**. Click this option to import account information from external data sources. For more information, see **"To import data" on page 107**.

### To create an account

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




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

Account Information:

**Account Name**. Enter a name for the account.

**Phone**. Enter the phone number of the organization.

**Fax**. Enter the fax number for the organization.

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

**Email**. Enter an email address for the organization.

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

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

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

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

**Employees**. Enter the number of employees in the organization.

**Ownership**. Specify the owner information.

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

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

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

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

**Annual Revenue**. Enter the annual revenue for the organization.

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

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

If you select a lead from the Lead list, the system automatically enters the address for you. However, you can edit this information if needed.

Description: Enter a brief description for the lead.

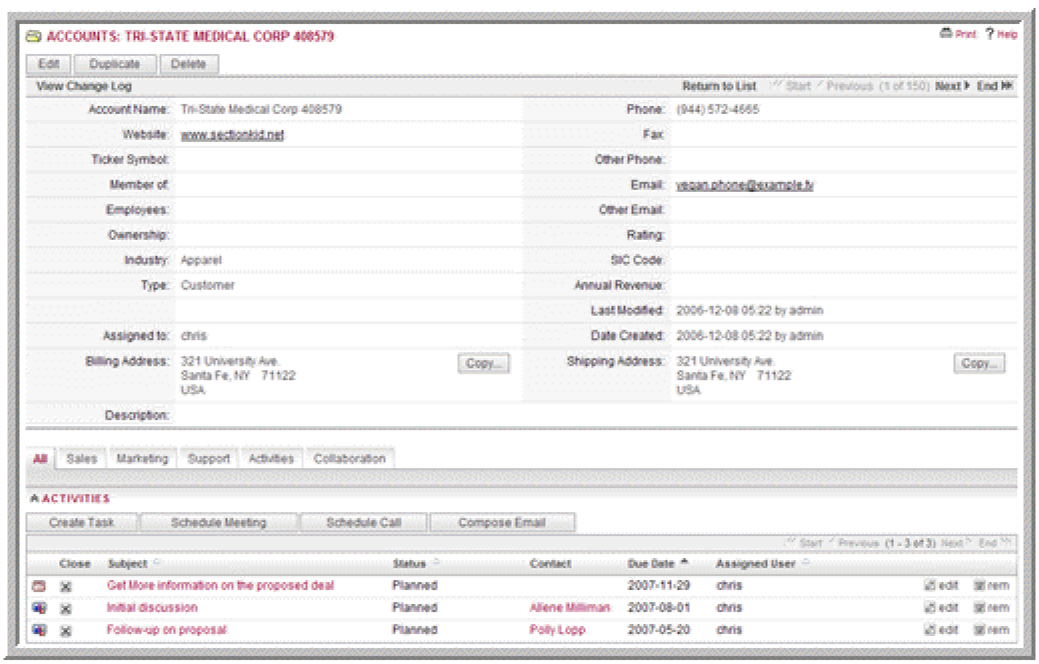
3. Click **Save** to save the new account information; click **Cancel** to exit the page without saving the information.

**To view and manage accounts**

- To sort the Accounts list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete all or some accounts on the list, use the Mass Update section as described in **"To edit or delete multiple records" on page 20**.
- To export records, click the Export link and follow the process described in **"Exporting Data" on page 110**.
- To merge duplicates, click the Merge Duplicates link and following the process described in **"Merging Duplicate Records" on page 22**.
- To view the details of an account, click its name in the list.

- The detail page displays sub-panels for related records such as Activities, History, Contacts, Opportunities, and Leads. You can create new records or edit existing ones. You can also copy the billing address or shipping addresses as described in **"To propagate billing or shipping addresses to a contact" on page 50**.
- To copy the billing or shipping address, click the **Copy** button adjacent to the address, select one or more names from the Contact list, and click **Copy Address to Checked Contacts**.
- To edit an account, on the Detail page, click the **Edit** button, make the necessary changes, and click **Save**.
- To duplicate an account, on the Detail page, click the **Duplicate** button, and click Save.
- The system duplicates the account and displays its detail page. Duplication is a convenient way of creating a similar account. You can change the information in the duplicate record to create a new account.
- To delete the account, on the Detail page, click **Delete**.
- To track changes to account information, on the account detail page, click **View Change Log** below the **Edit** button.
- To view or manage related records in a sub-panel, see **"To manage related information in sub-panels" on page 19**.

The account's detail view provides an option to propagate the Account Bill-to or Ship-to address for selected contacts.




### To propagate billing or shipping addresses to a contact

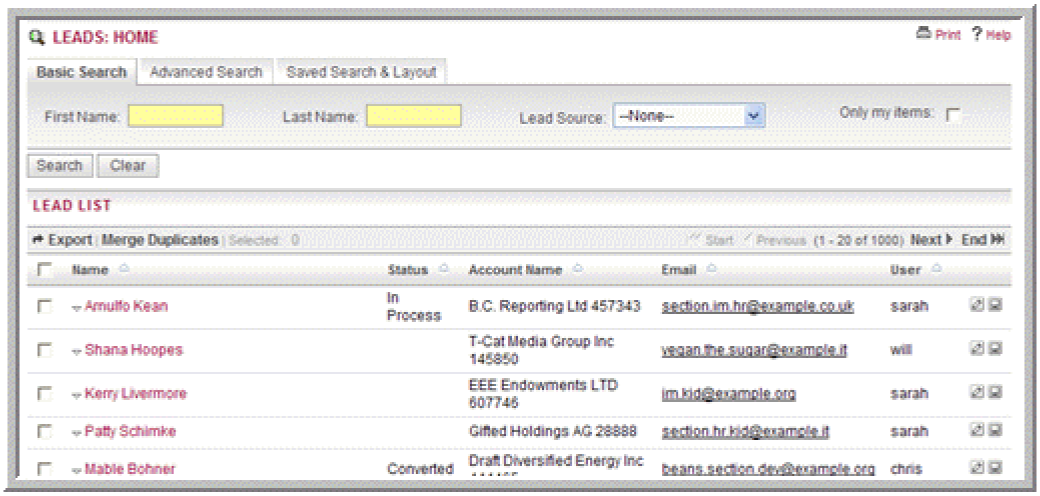
1. Click the **Copy** button adjacent to the billing address or the shipping address as appropriate.

   The Contact List window displays.

2. In the Contact List, select one or more individuals associated with the account and click **Copy Address to Checked Contacts**.
3. The address field is propagated for the selected contacts.

# Leads Module

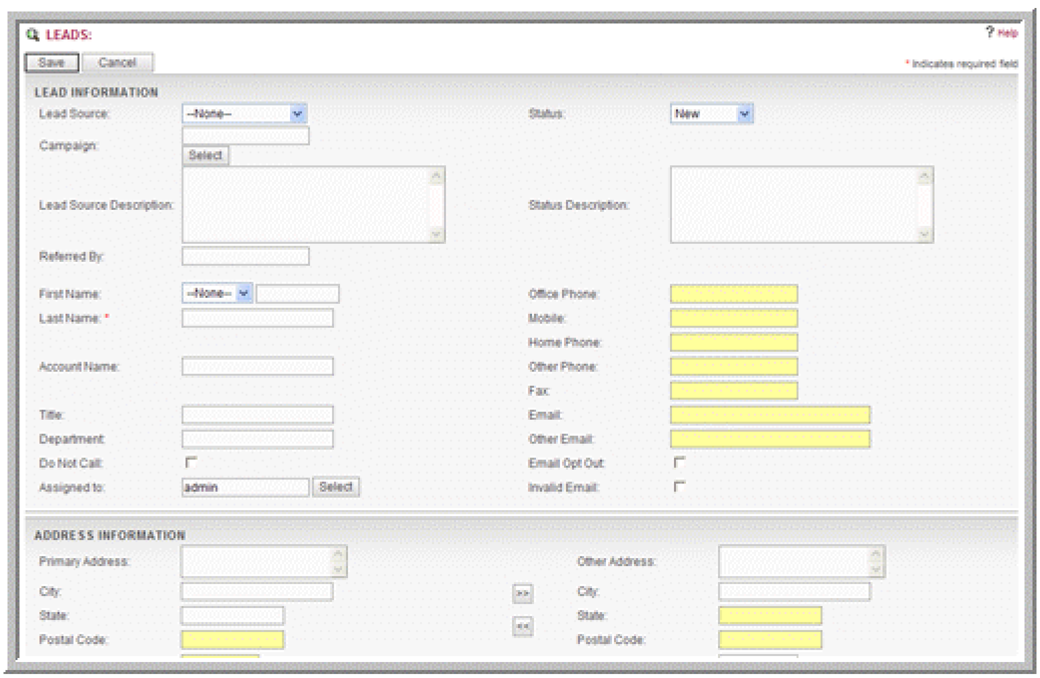
Use the Leads module to create and manage sales leads for your organization. Leads are early contacts in the sales process. After they have been evaluated and assessed, you can convert them into contacts, opportunities, and accounts. You can associate a lead with any type of campaign to track the effectiveness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




### To create leads

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

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




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

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

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

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

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

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

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

**First Name**. Enter the lead's first name.

**Last Name**. Enter the lead's last name.

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

**Mobile**. Enter the lead's mobile phone number.

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

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

**Fax**. Enter the lead's fax number.

**Email**. Enter the lead's email address.

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

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

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

**Account Name**. Enter the name of the account related to the lead.

**Title**. Enter the business title of the lead.

**Department**. Enter the department to which the lead belongs.

**Do Not Call**. Check this box to add the lead's name to the Do Not Call list. This is to ensure that the lead is not targeted during campaigns.

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

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

If you select a lead from the Lead list, the system automatically enters the address for you. However, you can edit this information if needed.

Description Information: Enter a brief description for the lead.

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

## Managing Lead Information

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

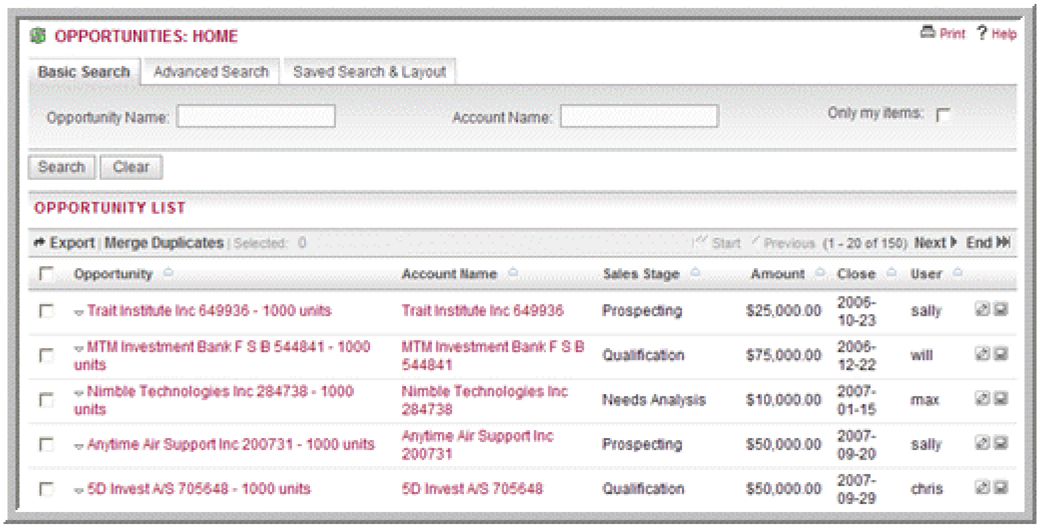
**To manage leads**

- To edit or delete information some or all of the leads, use the Mass Update section as described in **"To edit or delete multiple records" on page 20**.
- To view detail information, click on the lead name the list.
- To export records, click the Export link and follow the process described in **"Exporting Data" on page 110**.
- To merge duplicates, click the Merge Duplicates link and following the process described in **"Merging Duplicate Records" on page 22**.
- To edit information, on the Detail page, click the **Edit** button.
- To duplicate a lead, on the Detail page, click the **Duplicate** button.
- Duplication is a convenient way of creating a similar lead. You can change the information in the duplicate record to create the new lead.
- To delete a lead, on the Detail page, click the **Delete** button.
- To convert a lead to a contact, click **Convert Lead**. Optionally, you can also convert the lead to a related Account, Opportunity, and Appointment.
- To track changes to the lead information over time, click the **View Change Log** link.
- To view and edit related information in a sub-panel, see **"To edit or delete multiple records" on page 20**.

**Note:** You can create Web-to-Lead forms for use in your Web-based campaigns and other sources such as your Website. This lead information is saved in the Sugar database and can be used to generate opportunities for your organization. For more information, see **"Creating Web-to-Lead Forms" on page 89**.

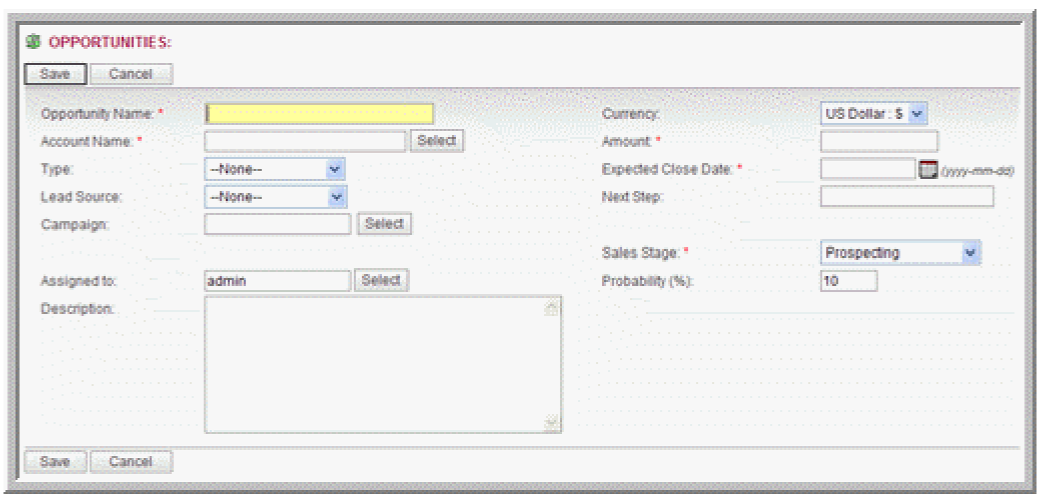
# Opportunities Module

Use the Opportunities module to create and manage sales opportunities for your organization. You can associate an opportunity with any type of campaign to track the effectiveness of the campaign in generating opportunities for your organization.




**To create an opportunity**

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




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

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

   **Opportunity Name**. Enter a name for the opportunity.

   **Account Name**. Enter the name of the account related to the opportunity. To choose from the list of existing accounts, click **Select**.

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

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

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

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

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

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

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

**Sales Stage**. The current stage of this opportunity. The value specified for the Sales Stage determines the default value displayed in the Probability field on the Opportunity page.

**Probability (%)**. Enter a percentage that represents the chance of closing a sale.

**Description**. Enter a brief description of the opportunity.

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

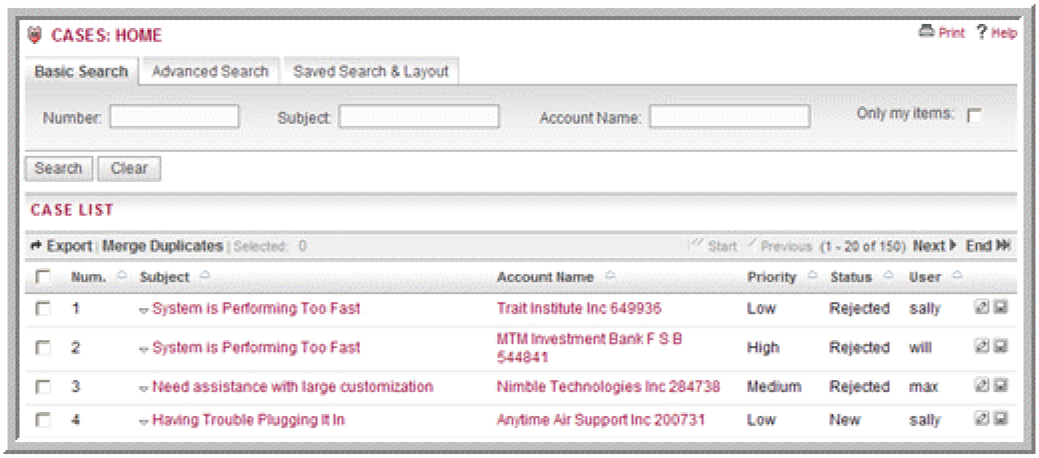
**To manage opportunities**

- To sort a list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete some or all the listed opportunities, use the Mass Update sub-panel as described in **"To edit or delete multiple records" on page 20**.
- To export records, click the Export link and follow the process described in **"Exporting Data" on page 110**.
- To merge duplicates, click the Merge Duplicates link and following the process described in **"Merging Duplicate Records" on page 22**.
- To view the details of an opportunity, click the opportunity name in the list.
- To edit the details, on the Detail page, click the **Edit** button.
- To duplicate an opportunity, on the Detail page, click the **Duplicate** button.
- Duplication is a convenient way of creating a similar opportunity. You can change the information in the duplicate record to create a new opportunity.
- To delete an opportunity, on the Detail page, click the **Delete** button.
- To track changes to an opportunity over time, click the **View Change Log** link.
- To view and manage related records in a sub-panel, see **"To manage related information in sub-panels" on page 19**.
- To view or create an opportunity report, click **Opportunities Report**.

- To import opportunity data from an external source, see **“To import data” on page 107**.

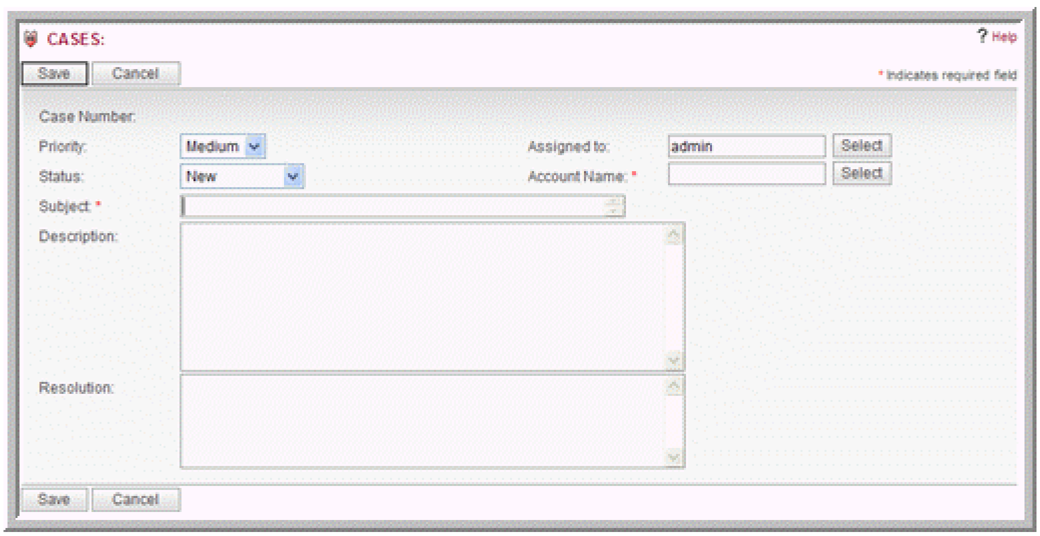
# Cases Module

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




**To create a case**

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




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

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

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

   **Subject**. Enter a brief statement of the problem.

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

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

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

**Description**. Enter a clear description of the problem.

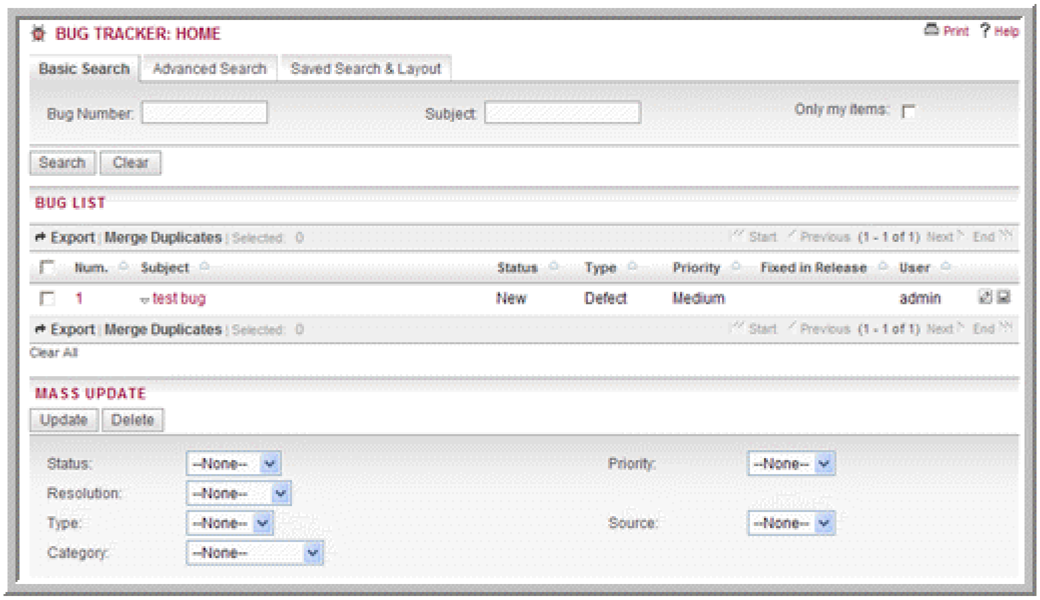
**Resolution**. Enter the results of the investigation into the problem.

**To manage cases**

- To sort a list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete some or all cases, use the Mass Update section as described in "Editing and Deleting Multiple Records".
- To export records, click the Export link and follow the process described in **"Exporting Data" on page 110**.
- To merge duplicates, click the Merge Duplicates link and following the process described in **"Merging Duplicate Records" on page 22**.
- To view the details of a case, on the Cases home page, click on the case name in the list.
- To edit the case details, on the Detail page, click the **Edit** button.
- To duplicate a case, on the Detail page, click the **Duplicate** button.
- Duplication is a convenient way of creating a similar case. You can change the information in the duplicate record to create a new case.
- To delete a case, on the Detail page, click the **Delete** button.
- To track changes to the case over time, click the **View Change Log** link.
- To export information on one or more cases, select them in the Case List sub-panel on the Cases Home page, click the **Export** icon, and export them as described in **"To export data from Sugar Suite" on page 110**.
- To create or edit related records in a sub-panel, see "To manage related information in sub-panels".

# Bug Tracker Module

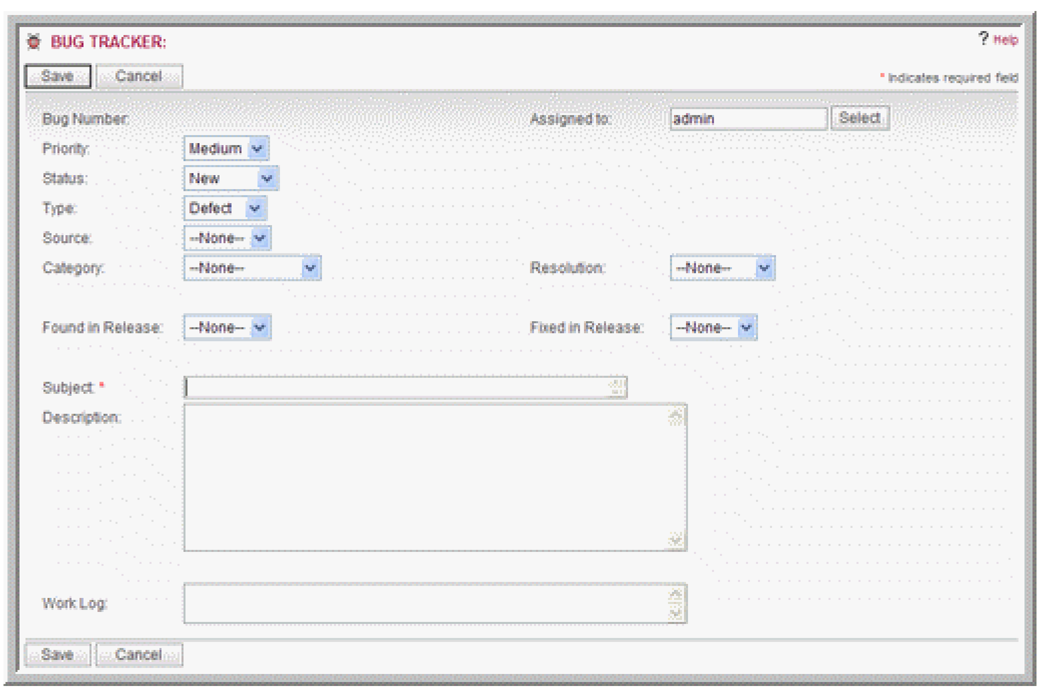
Use the Bug Tracker module to report, track, and manage product bugs. Bugs are defects or features associated with a particular revision of a product.




The administrator populates the drop-down list of releases.

### To report a bug

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




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

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

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

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

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

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

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

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

**Subject**. Enter a brief statement of the problem.

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

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

**Description**. Enter a description of the problem.

**Work Log**. Enter how the bug was resolved.

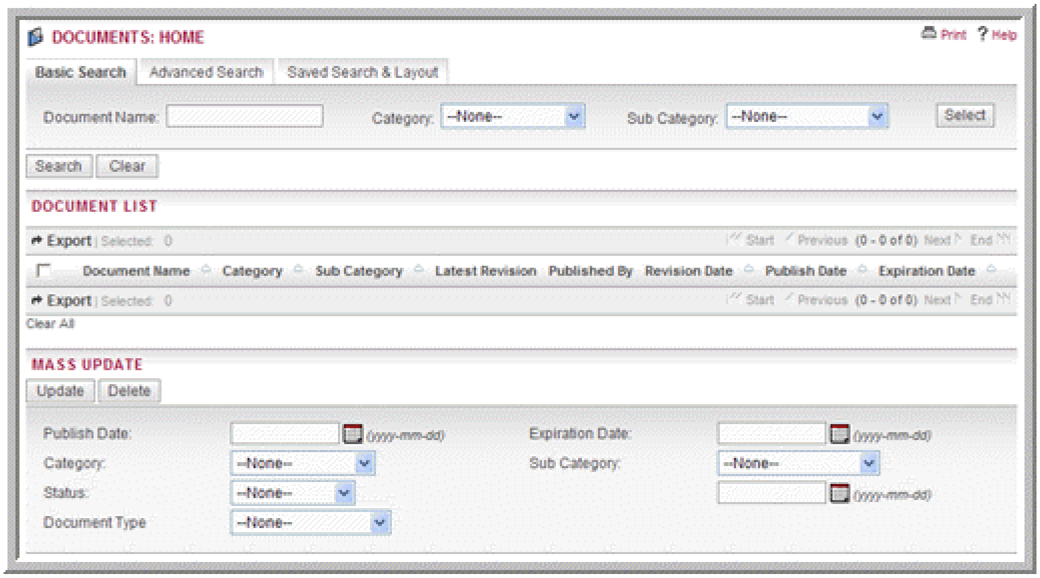
**To manage bugs**

- To sort a list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete some or all of the bugs, use the Mass Update section as described in **"To edit or delete multiple records" on page 20**.
- To export records, click the Export link and follow the process described in **"Exporting Data" on page 110**.
- To merge duplicates, click the Merge Duplicates link and following the process described in **"Merging Duplicate Records" on page 22**.
- To view the details of a bug, on the Bug Tracker home page, click on the bug in the Subject column.
- To edit the bug details, on the Detail page, click the **Edit** button.
- To duplicate a bug, on the Detail page, click the **Duplicate** button.
- Duplication is a convenient way of creating a similar bug. You can change the information in the duplicate record to create a new bug.
- To delete a bug, on the Detail page, click the **Delete** button.
- To track changes to the bug over time, click the **View Change Log** link below the Edit button.

- To export information on one or more bugs, select them in the Bug List sub-panel on the Bugs Tracker Home page, click the **Export** icon, and export them as described in **"To export data from Sugar Suite" on page 110**.
- To create or manage related records in a sub-panel, see **"To manage related information in sub-panels" on page 19**.

# Documents Module

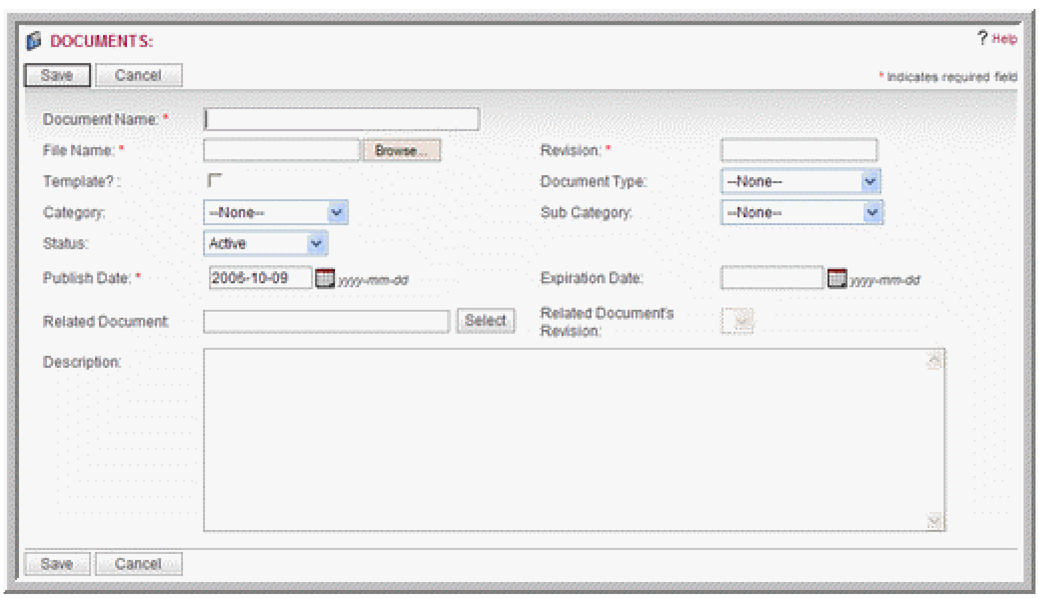
Use the Documents module to create and manage files that you share with users and customers.




You can create a variety of documents for Marketing and Sales. You can also create templates for frequently used documents.

### To create a document

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




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

   **Document Name**. Enter a name for the document.

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

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

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

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

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

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

When you select a Category and Sub Category for the document, the document is added to the Document tree using a hierarchical structure. The tree structure only displays in the list view and helps organize the files and makes it easier to find documents under a specific subject. The values listed in Categories and Sub Categories are defined by the administrator.

**Status**. From the drop-down list, select the document status.

**Publish Date**. Click the Calendar icon and select the date when the document is published for other users to view and download it.

**Expiration Date**. Click the Calendar icon and select the date when the validity of the document expires.

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

**Related Document Revision**. From the drop-down list, select the revision number of the associated document.

**Description**. Enter a brief description of the document.

3. Click **Save** to create the document; click **Cancel** to return to the document list without saving the document.

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

**To manage documents**

- To sort a list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To edit or delete some or all the documents, use the Mass Update section as described in **"To edit or delete multiple records" on page 20**.
- To view the details of a document, on the Documents home page, click its name in the list; links to attachments, if any, are displayed below Description.
- To view an attachment, click the **attachment** link; To update an attachment, see **"To update an attachment" on page 65**.
- To edit a document, on the Detail page, click the **Edit** button.
- To duplicate a document, on the Detail page, click the **Duplicate** button.

- Duplication is a convenient way of creating a similar document. You can change the information in the duplicate record to create a new document.
- To delete a document, on the Detail page, click the **Delete** button.
- To track changes to the document over time, click the **View Change Log** link below the Edit button.
- To export documents, select them in the Document List sub-panel on the Documents Home page, click the **export** icon, and export them as described in **"To export data from Sugar Suite" on page 110**.
- To create or manage the related records in a sub-panel, see **"To manage related information in sub-panels" on page 19**.

**To update an attachment**

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

   The Documents Revision page displays. The current document name and revision number appear on this page.
2. Enter information for the following fields:

   **FileName**. Enter the name of the file containing the revised information; to navigate to the file location, click Browse.

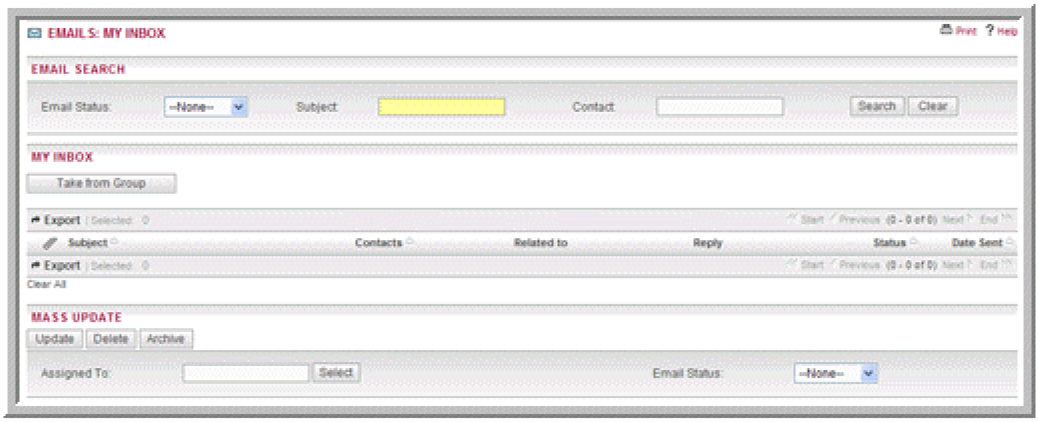
   **Revision**. Specify a revision number for the revised document.

   **Change Log**. Enter a brief description of the revision.
3. Click **Save** to save your changes; click **Cancel** to go back to the document detail page without saving your changes.

   You cannot change the name of the attached file. The revised file is displayed along with its revision number in the Documents Revisions sub-panel. In this sub-panel, the row listing the older document version now displays the rem icon to remove the file.
4. To remove the previous version of the attachment, click the rem icon, and click **OK** to confirm the removal.

# Emails Module

Use the Email module to manage your inbound and outbound emails.




When you create an email, you can associate it with a specific item such as an account, case, or opportunity. If necessary, you can save the email as a draft and send it out at a later date. You can also export it, in CSV format, as a Microsoft Excel spreadsheet to your local machine.

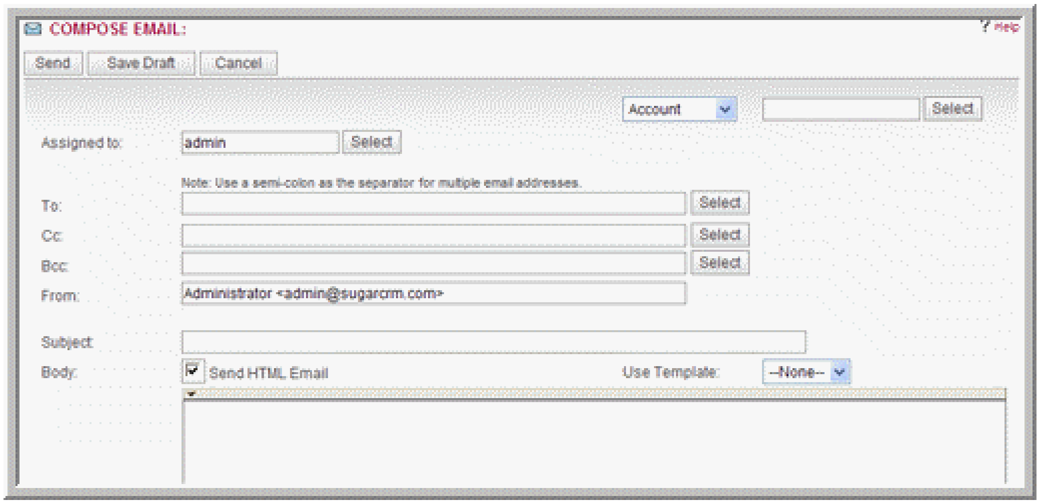
To send out a standard email for a mass email campaign, you can use an email template. The system extracts variables such as names and addresses from Target records and merges it with the email template when it sends out the email. For more information on email templates, see **"Creating Email Templates" on page 70**. For more information on email campaigns, see **"Executing an Email Campaign" on page 79**.

For emails that your organization receives, the administrator has the capability to monitor specific inboxes, for example, support@company.com and assign the emails to users. Users can monitor their own inbox.

You can copy and archive emails that you send or receive through Sugar Suite, Microsoft Outlook, or other email systems. Archiving emails allows you to store records of customer interactions in a convenient location. For more information on archiving, see **"Archiving Emails" on page 69**.

**To create an email**

1. In the Shortcuts menu, click **Compose Email**.




To format the text, use the text formatting toolbar. To view the toolbar, click the down arrow above the text field.

Highlight the text and click buttons on the toolbar to apply standard formatting options such as font face, size, bold, italics, indentation and color. Additional buttons insert rules, hyperlinks, pictures, table and display the HTML source code.

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

   **Assigned to**. Click **Select** and, from the Users list, choose the individual assigned the account or other item.

   **Account**. This is the Item drop-down list. To associate this email to an item such as Account or Opportunity, select it from the drop-down list. Click **Select** to choose a record from the item list.

   **To**. Enter the name of the email recipient or click **Select** to select an individual from the Contact list.

   **Cc**. Enter one or more names of individuals from the contact list who will receive a copy of the email.

   **Bcc**. Enter one or more names of individuals from the contact list who will receive a blind copy of the email.

   **From**. Enter your name.

   **Subject**. Enter the subject of the email.

   **Send HTML email**. Select this box to send the email in HTML format.

   **Use Template**. To use an existing email template, select it from the drop-down list.

**Body**. Enter the text of the email in this field.

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

**Attachments**. Click **Add a file** to attach a file located on your local machine; Click **Add a Sugar Document** to attach a file located in the Sugar repository.

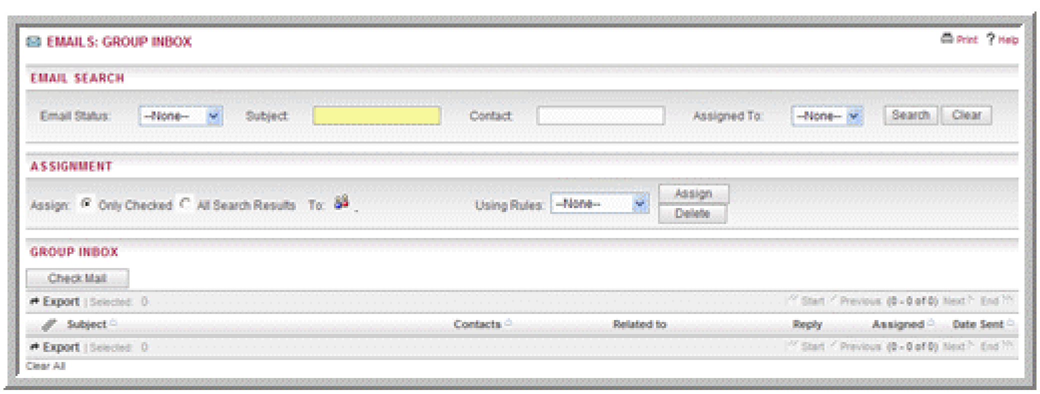
This attachment is listed as a note related to your email. To remove either attachment, click **Remove**.

**Note:** Ensure that the email options are set correctly in your account settings (My Account). Your administrator must provide this information for your environment.

**To manage inbound emails**

- To view a list of emails that you received, including emails assigned to you by other users, click **My Inbox**.
- You can parse emails in your inbox and associate them to existing Sugar records such as a Case ID. You can also create a related lead, case, contact, bug, or task.
- To update, delete, or archive some or all emails that you received, use the Mass Update section as described in **"To edit or delete multiple records" on page 20**.
- To check for new emails, click **Check My Mail**.
- To view a list of emails that you saved as drafts, click **My Drafts**.
- To view the contents of a draft, in the My Drafts sub-panel, click the email subject; to send out the draft, click **Send**.
- To view a list of inbound emails that you archived for your records, click **My Archives**.
- To view a list of inbound emails that are not assigned to any specific user, click **Group Inbox**.

  Typically, the administrator retrieves emails from monitored mailboxes and stores them in the Group Inbox to assign them to users for necessary action. After they are distributed, the emails appear in the inbox of assigned users.



**To distribute inbound emails**

1. In the Assignment sub-panel, specify the following:

   **Assign**: Select Only Checked to assign only emails that you select from the Group Inbox below. Select All Search Results to assign all the emails in the Group Inbox.
2. **To**. Click the Users icon to display a list of existing users.
3. Select one of the following options from the **Using Rules** drop-down list:

   **Direct Assignment:** The user selects the users and assigns the emails to them.

   **Round Robin**: The assigned emails are distributed equally among assigned users.

   **Least Busy**: The system counts the emails marked as Assigned or Unread in the user inbox and routes assigned emails to the user who has the lowest number of assigned or unread emails. When all the users have an equal number of assigned emails, the system switches to the round robin mode.
4. Click **Assign** to assign the email to the selected users.
5. To delete some or all of the emails in the Group Inbox, select the emails and click **Delete**.

**To manage outbound emails**

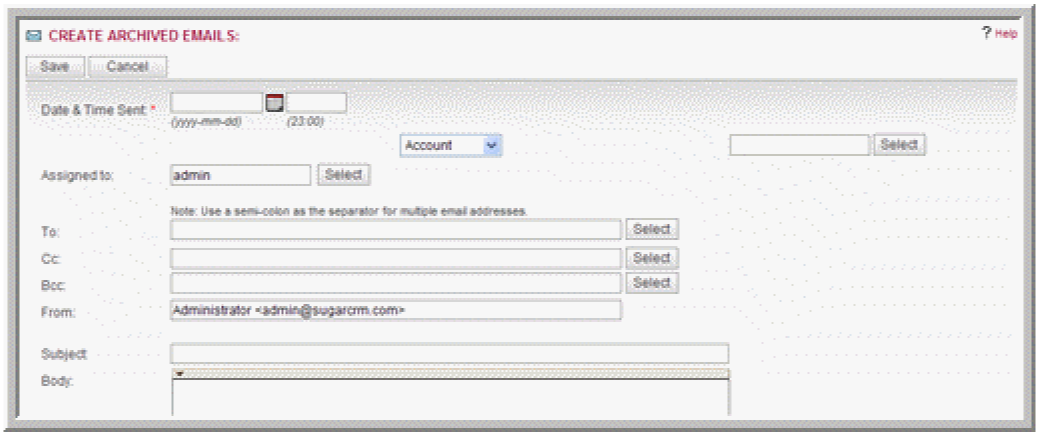
1. To view a list of emails that you sent, click **Sent Emails** in the Shortcuts menu.
2. To view the contents of an email, click the email subject.
3. To view all your existing draft, click **All Drafts**.
4. To view a list of your outbound emails including drafts, click **All Emails**.
5. To view a list of your email templates, click **Email Templates**.

## Archiving Emails

You can copy inbound and outbound emails through Sugar Suite, Microsoft Outlook, or other external email systems, and archive them for your records.

Archiving emails allows you to store records of customer interactions in a convenient location. Optionally, you can associate an archived email with any item such as an account, opportunity, bug, or case. For example, if you associate an archived email with an account, the email displays in the History sub-panel of that account. Clicking on the email link in the History sub-panel displays the details of the email.

You can attach Sugar documents or documents from external file systems to archived emails.




**To view and archive emails**

1. To view your inbound and outbound emails, click **Emails** in the Shortcuts menu.
2. To create a copy of an email for archival, click **Create Archived Email**.
3. In the Create Archived Emails form, enter information for the following fields:

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

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

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

   **To**. The recipient of the email.

   **Cc**. The individuals copied on the email.

   **Bcc**. Any individuals who received a blind copy of the email.

   **From**. The individual who sent out the email.

   **Subject**. The subject of the email.

   **Body**. The contents of the email.

   **Edit Plain Text**.

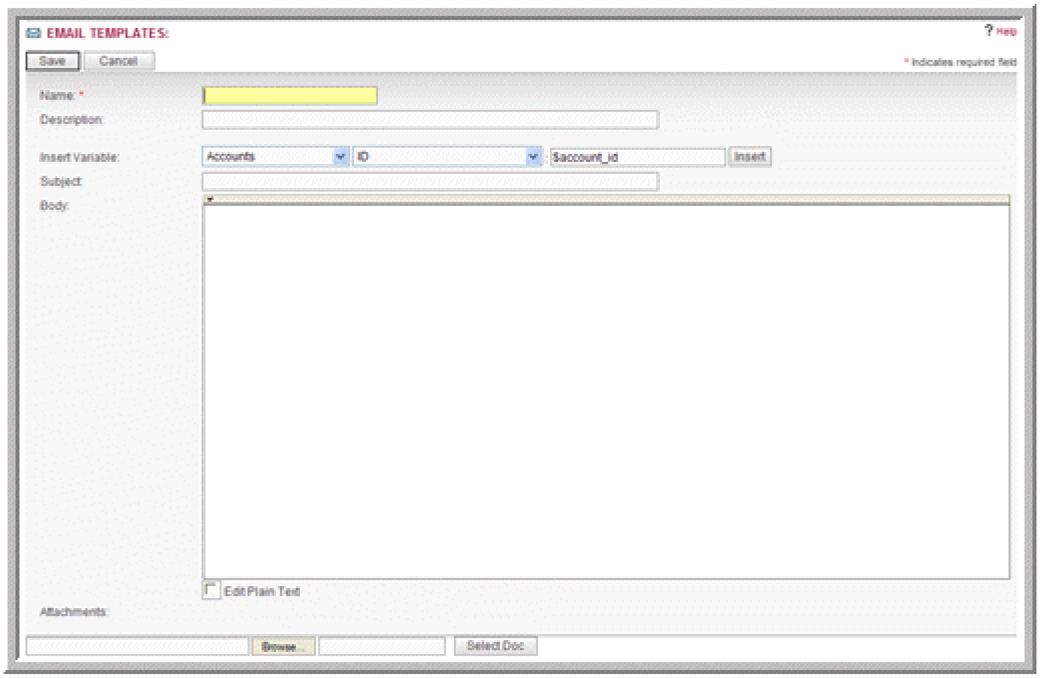
   **Add a file**. Click this button to attach a file that is located on your machine. You can enter the path to the file or click **Browse** to navigate to the file.

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

## Creating Email Templates

You can use email templates to create form letters for individuals and for mass email campaigns. You enter the message in the template, and then specify variables, such as the recipient's name and email address from your list of targets. The system inserts these variables into the template to create a personalized email for each target. When you create a template, you can embed images and attach files from the Sugar Suite repository or from your local file system.

When you create a template for an email campaign, you can insert tracker URLs into the template to track campaign activity. For more information on email campaigns, see **"Executing an Email Campaign" on page 79**.




**To create an email template**

1. In the Shortcuts menu, click **Create Email Template**.
2. Enter information for the following fields:

   **Name**. Enter a name for the template.

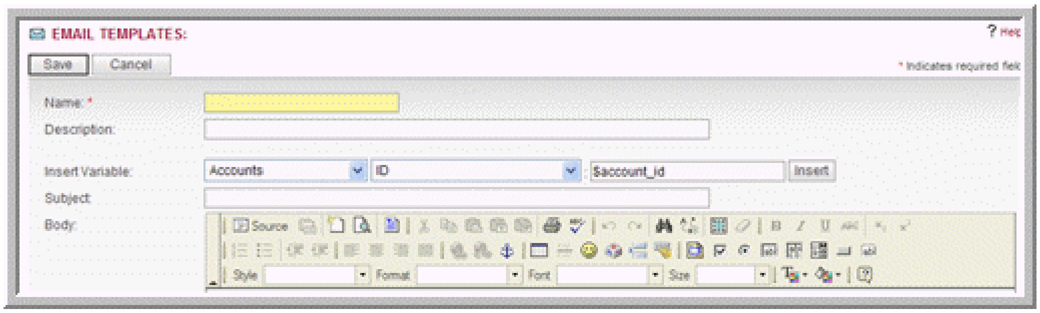
   **Description**. Enter a brief description about the template.

   **Insert Variable**. From the drop-down list, select an item such as Contact and an item field such as Full Name and click Insert.

   The system displays the variable in the Body field.
3. **Insert Tracker URL**. This field displays only when you create the template from the Email Marketing Record of an Email campaign. From the drop-down list, select the tracker URL to insert. The adjoining field displays the tracker for plain text format. Use this if you want to display the email in plain text format.
4. **Subject**. Enter the title of the message.
5. **Body**. Enter the email message. You can also embed images and add URL links.

To view and use the text formatting toolbar, click the down-arrow below the Body field.


Highlight the text and click buttons on the toolbar to apply standard formatting options such as font face, size, bold, italics, indentation and color. Additional buttons insert rules, hyperlinks, pictures, table and display the HTML source code.




6. To view the HTML source text for the Default link text, click **Source** in the HTML editor.

   The HTML source code displays in the Body field as follows:

   <a href="{asdf}">Default link text.</a>

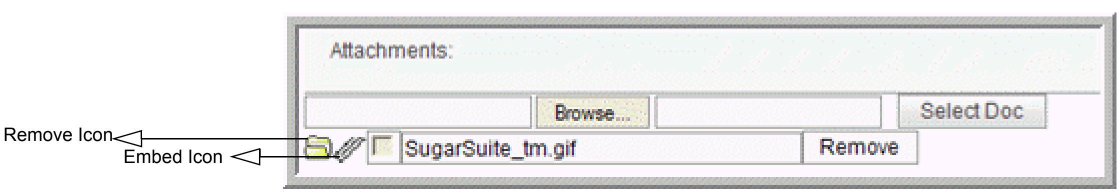
7. Replace “Default link text” with the message that you want to send out to the campaign recipients.

8. **Edit Plain Text.** Select this box to display the email in plain text format. You can choose this option if an email client cannot render HTML code.

9. **Attachments**:

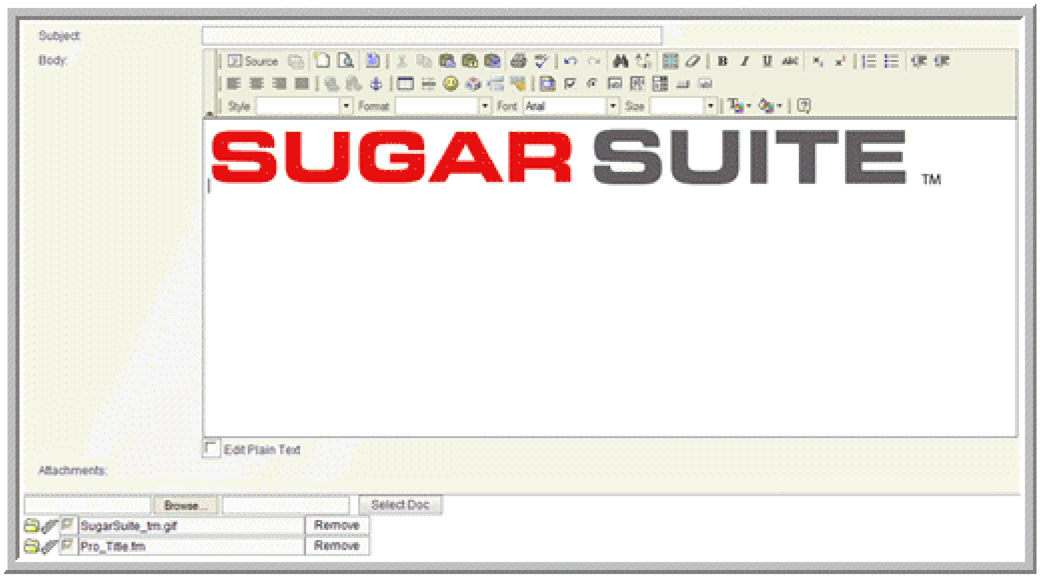
   **Browse.** To attach a file, including images, click this button to navigate to its location on your local machine.

   The attached files displays below the Browse button.




   a. To embed an attached image file, click the Embed icon; to remove it, click **Remove**.

The screen below displays an embedded image.




**Select Doc.** Click this button to attach a document from the Sugar repository; when you select the file from the Documents List, the system attaches it to the email template.

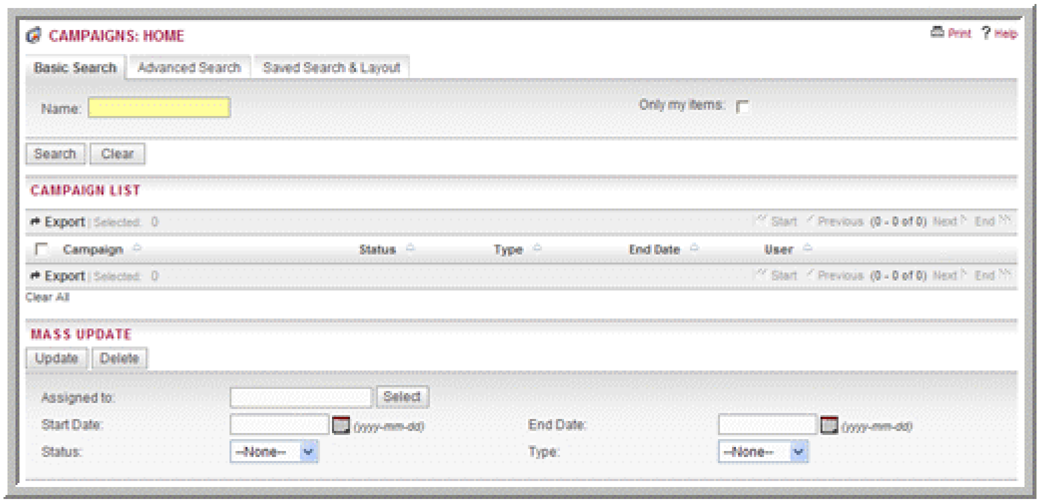
10. Click **Save** to create the template; click **Cancel** to exit the page without saving your changes.

**To manage email templates**

1. To search for a template, enter the name or description in the Search sub-panel on the Email Templates Home page, and click **Search**.
2. To view the details of a template, click the template name from the list on the Email Templates Home page.
3. To edit the template, on the Detail page, click **Edit**, make the changes, and click **Save**.
4. To duplicate the template, on the Detail page, click **Duplicate** and click **Save**.
5. To delete the template, on the Detail page, click **Delete**; to delete some or all the templates, select them from the list on the Email Templates Home page, and click **Delete**.
6. To export one or more templates, select the templates from the list on the Email Templates Home page, and click **Export**.
7. To deselect templates that you selected in the list, click **Clear All**.

# Campaigns Module

Use the Campaigns Module to track and manage mass marketing campaigns.




A mass marketing campaign typically targets a large group of individuals or organizations. Therefore, you need to specify a list of targets when you create the campaign.

## Creating and Importing Campaign Targets

The campaign process begins with a target. A target is an individual that you have some information on but does not qualify as a lead or contact. When you have multiple targets, you can group them into a target list according to a set of predetermined criteria such as age group or spending habits.

Targets are stand-alone records that are not attached to Contacts or Leads. However, you can include Contact, Lead, Target, and User records in a target list. You can use a target list to specify individuals that you want to include in or exclude from a campaign.

You can add targets to the target list by importing them from a file (either CSV or TSV) or by selecting them from existing contacts and leads. For information on importing targets, see **"Importing Data" on page 105**.

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

The general process is as follows:

Targets → Target List → Campaign

When you create a target list, you can specify one of the following types:

**Default**. A list of people who are the campaign targets and receive the campaign email.

**Seed**. A list of people who need to receive the campaign email but must not be tracked as potential leads.

**Test**. A list of people who will receive a campaign email to test it before it is sent out to the default list.

**Suppression List**: A list of people you want excluded from the campaign email recipient list. Suppression lists can be by ID, email address, or domain.

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

If you have purchased a license for the Sugar Plug-in for Microsoft Word, you can create a form letter in Word for your targets and perform a mail-merge to customize the letter for each target. For more information on Word plug-in, see *Sugar Plug-in for Microsoft Word*. For more information on performing a mail merge, see **"Performing a Mail Merge" on page 92**.

**To create a target list**

1. From the Shortcuts menu on the Campaigns Home page, click **Create Target List**.
2. On the Target Lists page, enter the following information:

   **Name**. Enter a name for the target list.

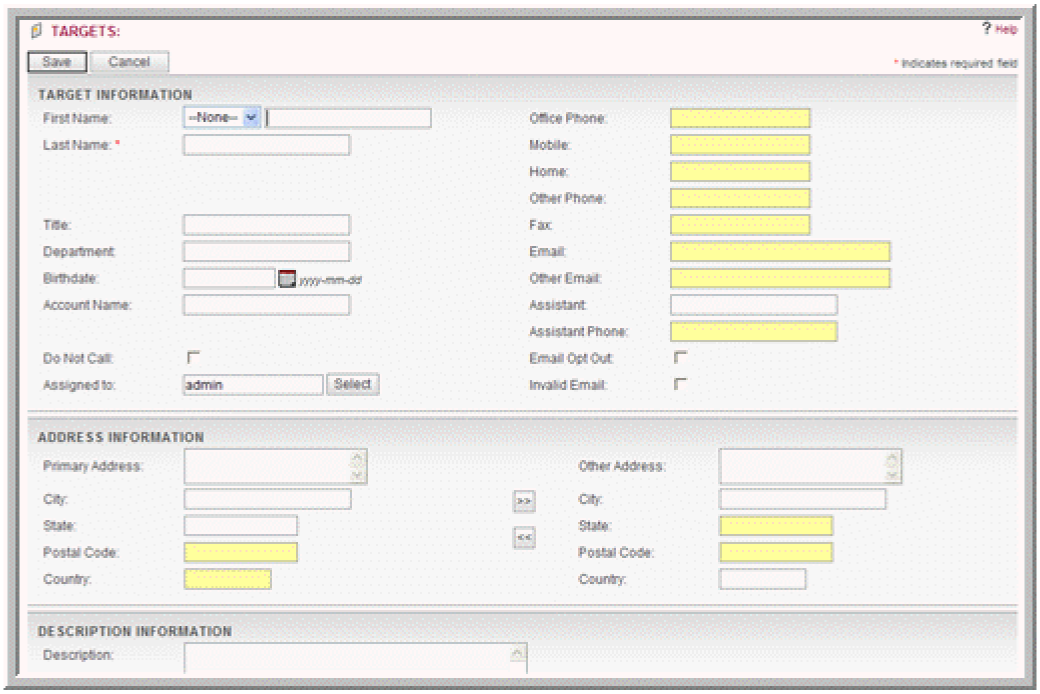
   **Type**. From the drop-down list, select the target list type.

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

   **Description**. Enter a brief description of the target list.
3. Click **Save** to save the target list; click **Cancel** to exit the page without creating the list.

**To create a target**

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




**Note:** Targets are stand-alone records that are not attached to Contacts or Leads. If you plan to send emails to existing Contacts or Leads, you can skip the step below.

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

   Target Information

   **First Name**. Enter the target's first name.

   **Last Name**. Enter the target's last name.

   **Office Phone**. Enter the target's work number.

   **Mobile**. Enter the target's mobile phone number.

   **Home**. Enter the target's home phone number.

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

   **Fax**. Enter the target's fax number.

   **Email**. Enter the target's email address.

   **Other Email**. Enter the alternative email address, if any.

   **Assistant**. Enter the target's assistant's name.

   **Assistant Phone**. Enter the assistant's phone number.

   **Email Opt Out**. When you select this box, if the target clicks the "Unsubscribe" URL to opt-out of receiving your campaign emails, the system will display email address in the Opted Out sub-panel of the Campaign's Status page.

**Invalid Email**. When you select this box, if the email bounces back because the address was incorrect, the system will display it in the Bounced Messages, Invalid Email sub-panel of the campaign's Status page.

**Department**. Enter the name of the department to which the target belongs.

**Birthdate**. Enter the target's birth date.

**Account Name**. Enter the name of the account related to the target.

**Do Not Call**. Select this box to add the target's name to the Do Not Call list.

**Assigned to**. Select the user who has ownership of the account related to the target.

Address Information

**Primary Address**. The primary street address for the target.

**City**. The name of the city.

**State**. The State in which the city is located.

**Postal Code**. The zip code for the address

**Country**. The country where the city is located.

**Other Address**. The secondary address for the target. Use the >> arrow to copy the primary address.

Description

Enter a brief description of the target.

On the target's detail page, the Campaign Log sub-panel displays. This sub-panel will list the campaigns that were sent out to the target after you execute the campaign

## Creating a Campaign

You can create the many types of marketing campaigns such as Mail, Web, Radio, Television, Print, Telesales, Email, and Newsletter.

A newsletter is an email campaign that you send out on a regular basis to your targets. You can send out a newsletter on a weekly, monthly, quarterly, or yearly basis. When you create an email campaign or a newsletter campaign, you can execute it through Sugar Suite and, to measure its success, view statistics such as the number of targets that responded and the number of leads that were created. When you create other types of campaigns that cannot be executed through Sugar Suite, such as Mail or Radio, you are only creating a record for your reference.

You can also embed images in your email templates instead of sending them as attachments. This prevents your emails from being reported as spam. For more information on embedding images, see **"Creating Email Templates" on page 70**.

From the Contacts and Leads modules, you can associate a record with any type of campaign. For more information, see **"Contacts Module" on page 43** and **"Leads Module" on page 52**.

A campaign diagnostic tool is provided to help you ensure that all pending administrative tasks, such as setting up a bounce-handling inbox, have been completed. For more information, see **"Running Campaign Diagnostics" on page 83**.

The Campaigns module also provides an embedded Return on Investment (ROI) form that you can use to gauge the success of an executed campaign. For more information, see **"Viewing a Campaign's Return on Investment (ROI)" on page 89**.

To capture leads from an email or a newsletter campaign, you can create a Web-to-Lead form. For more information, see **"Creating Web-to-Lead Forms" on page 89**.

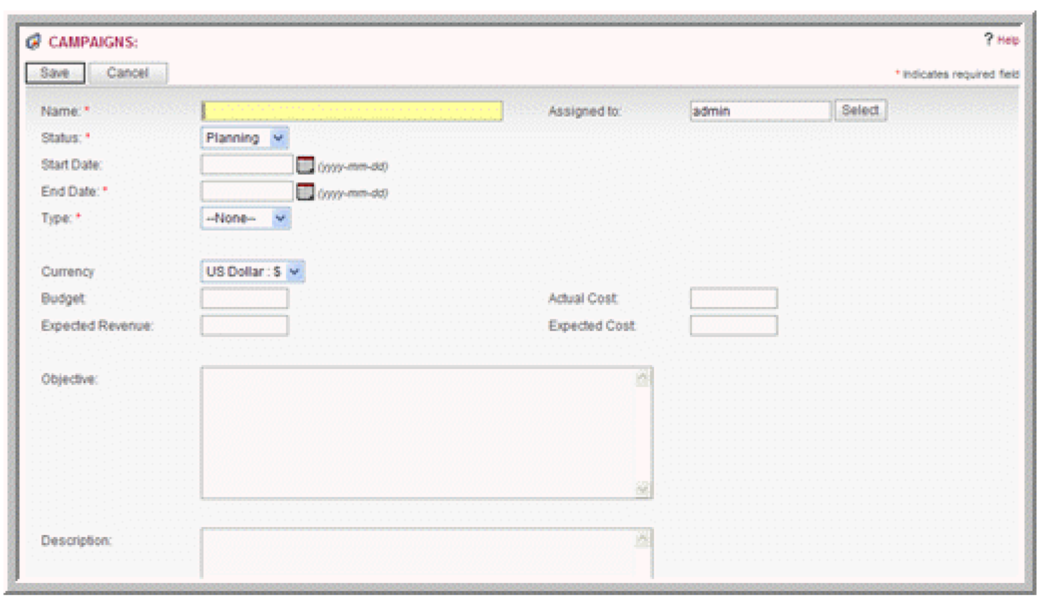
You can create a campaign using the Create Campaign option or the Campaign Wizard. When you use the Create Campaign option, you are creating a campaign record but you are not completing related tasks such as specifying the email settings. When you use the Campaign Wizard, it guides you through the process of creating the campaign as well as completing related tasks. For more information on the Campaign Wizard, see **"Using the Campaign Wizard" on page 83**.

After you launch a campaign, you can view its status to determine its success. For example, you can view how many targets viewed the campaign email, how many clicked any links that were included in the email, and how many leads and contacts were created from the campaign. For more information, see **"Managing Campaigns" on page 87**.

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

**To create a campaign**

1. From the Shortcuts menu, select **Create Campaign**.




2. Enter information for the following fields:

   **Name**. Enter the campaign name.

**Assigned to**. Enter the name of the user assigned to the campaign; to choose a user from the Users list, click **Select**, and click the user name.

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

**Start Date**. Click the Calendar icon and select the date on which the campaign begins.

**End Date**. Click the Calendar icon and select the date on which the campaign ends.

**Note:** The Start Date, End Date, and Status values are for your records only. These values do not impact the execution of an email marketing campaign.

**Type**. From the drop-down list, select the campaign type such as email or trade show. For more information on email campaigns, see "Executing an Email Campaign".

**Currency**. From the drop-down list, select the currency used to calculate the budget, cost, and revenue.

**Impressions**. Enter the number of page impressions generated from the campaign. Typically, you would fill in this field after the campaign has commenced.

**Budget**. Enter the budget for the campaign.

**Actual Cost**. Enter the actual cost incurred to conduct the campaign.

**Expected Revenue**. Enter the estimated revenue from the campaign.

**Expected Cost**. Enter the estimated cost of the campaign.

**Objective**. Explain the goal of the campaign.

**Description**. Enter a brief description of the campaign.

3. Click **Save** to save the campaign; click **Cancel** to return to the Campaigns home page without creating the campaign.

## Executing an Email Campaign

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

1. Create an email campaign as described in **"To create a campaign" on page 78**. Alternatively, you can use the campaign wizard to create the campaign as described in **"Using the Campaign Wizard" on page 83**. The Campaign wizard will guide you through the steps listed below.
2. Specify the targets as described in **"Creating and Importing Campaign Targets" on page 74**. You can import targets, or create a new target list, or merge with existing target list. You can also select individuals from a lead report or a contact report.
3. Create an email template containing the message you want to convey to your targets. For more information, see **"Creating Email Templates" on page 70**.
4. Specify an inbox for bounce-handling. This is required to handle campaign emails that bounce back to you. Only administrators can set up mailboxes for inbound

emails. When you create a bounce-handling inbox, all bounced campaign emails are routed to that inbox. Bounced emails contain specific identifiers that enable you to tell them apart from emails that are responses from your targets.

For more information, see the *Sugar Open Source Administration Guide*.

5. Create an email marketing record that specifies information such as the target list, the email template, the campaign start date, and the bounce-handling inbox. For more information, see **"Creating Email Marketing Records" on page 80**.
6. Optionally, specify one or more Tracker Redirect URLs to track campaign activities. For more information, see **"To create a tracker redirect URL" on page 82**.
7. Optionally, run the diagnostic tool to ensure that the email campaign will be successfully executed. For more information, see **"To run diagnostics" on page 83**.
8. Send a test email to your test list to ensure the operation is successful. For more information on test lists, see **"Creating and Importing Campaign Targets" on page 74**.
9. Clear statistics from the test email.
10. Request the administrator to schedule a job to send out the campaign emails.
11. Queue the email for the campaign launch.
12. Optionally, convert the campaign targets into leads or contacts.

You can associate a Web-to-Lead form with the campaign. For more information, see **"Creating Web-to-Lead Forms" on page 89**.

After you launch an email campaign, you can view the campaign status for information on the campaign results. For more information, see **"Viewing Campaign Status" on page 88**.

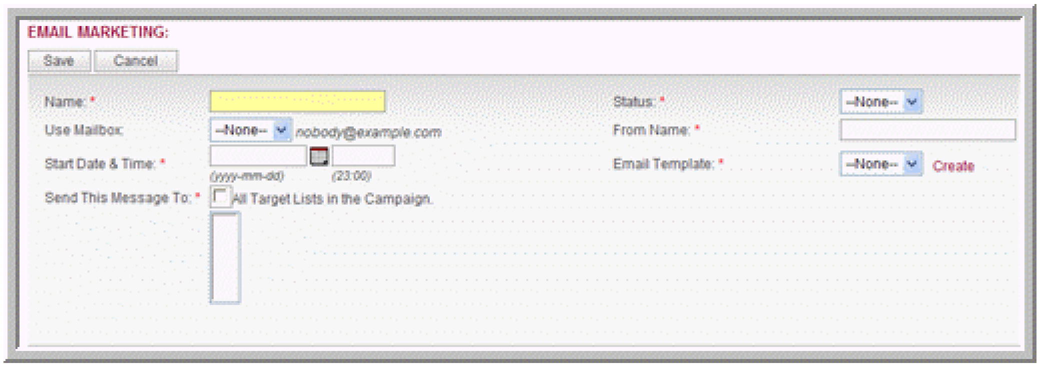
**Note:** The start date, start time, and status selected in the email marketing screen determine when the email is sent.

### Creating Email Marketing Records

When you create an email campaign, you must also create an email marketing record that contains information such as the campaign target list, the campaign email template, and the inbox to handle emails that bounce back to you. You must also specify the email marketing start date and time that is in the past to queue it for delivery. Any emails that bounce back are sent to the From address defined in this record.

**To create an email marketing record**

1. On the campaign's Detail page, scroll down to the Email Marketing sub-panel and click **Create**.




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

   **Name**. Enter a name for the record.

   **Status**. From the drop-down list, select Active if the record is in use; select Inactive if the record is not in use. Only active records will be queued for campaign launch.

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

   **From Name**. Enter the name of the organization or person that is sending out the email.

   **Start Date & Time**. Click the calendar icon and select a date to send out the email. Enter the time in the adjoining field.

**Note:** To queue the email for campaign launch, select a date and time that has already passed. Do this after you ensure that the test email was successful.

   **Email Template**. From the drop-down list, select an existing email template; to create a new template or edit an existing one, click the adjoining **Create** or **Edit** link respectively.

   You will need to edit the template to add the Tracker URLs described below, into the Text and HTML formats.

   **Send This Message to**. Select one or more target lists from the box below; to send it to all the target lists in the box, select the All Target Lists in the Campaign box.

3. To save the record, click **Save**; click **Cancel** to exit the page without saving your changes.

## Creating Tracker Redirect URLs

A campaign email can contain not only the campaign message but also images and links. Links can direct targets to other URLs such as an external Web site or a .php file on your system.

You can use one or more Tracker URLs in your campaign emails to track the response to your campaign. The system generates a unique key for each URL and for each recipient and associates it with the email template. When recipients open the email and click on a URL link, the system, using the unique key identifier, track each action by each recipient.

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

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

**To create a tracker redirect URL**

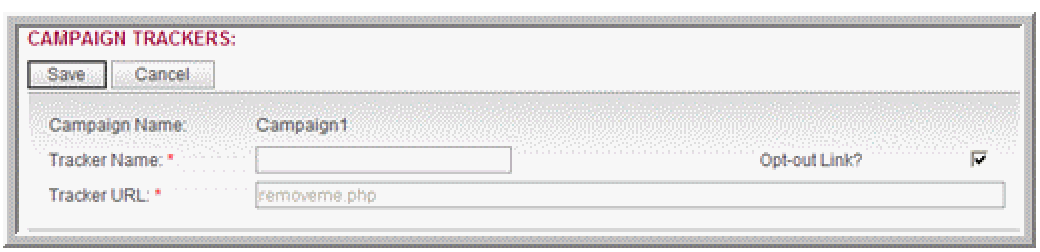
1. On the Campaign's Detail page, scroll down to the Tracker URLs sub-panel, and click **Create**.


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

   **Tracker Name**. Enter a tracker name for your reference; use alpha-numeric characters.

   **Tracker URL**. Enter the tracker URL; for example, *http://www.sugarcrm.com*.

   **Opt-out Link?** Select this box to embed your "Unsubscribe" instructions in a tracker URL. By default, the system uses the *removeme.php* file which contains these instructions, and displays this file name in the Tracker URL field.




**Note:** If you do not select the Opt-out link option, then the system inserts the default opt-out link. So, if you do not want to include an Opt-out link in your campaign message, select the Opt-out option but do not insert the link in the campaign message.

3. To create the campaign tracker, click **Save**; click **Cancel** to exit the page without saving your changes.

You can now insert this tracker URL into an email template of your choice. For more information, see **"Creating Email Templates" on page 70**.

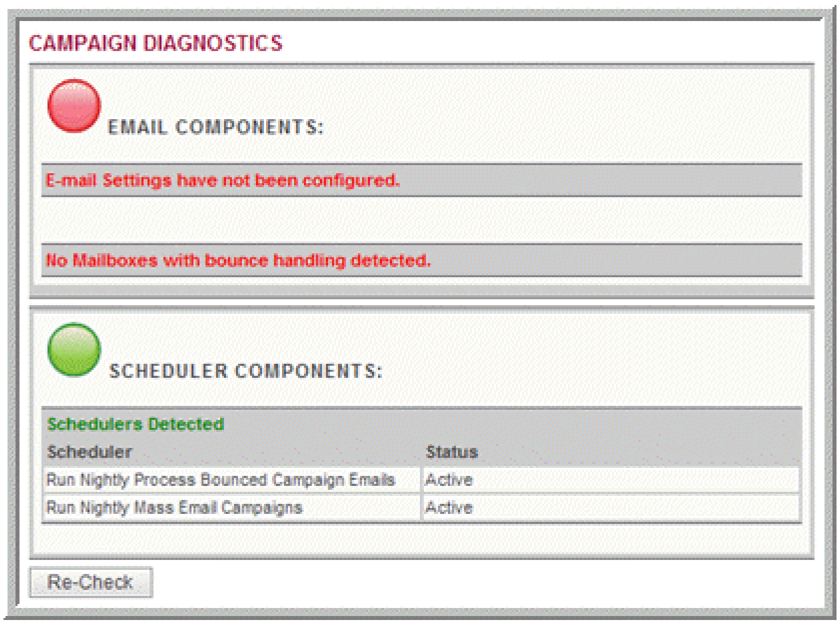
## Running Campaign Diagnostics

Executing an email campaign or a newsletter campaign involves several steps, some of which can be performed only by your administrator. The campaign diagnostic tool enables you to check if all pending administrative tasks have been completed before you attempt to launch the campaign.

**To run diagnostics**

1. In the Shortcuts menu of the Campaigns module, click **Diagnostic**.

The Campaign Diagnostics page displays.




If the email settings and a bounce-handling inbox have not been configured, warning messages display on this page. Contact your administrator to complete these tasks.

To perform the diagnostics again, click **Re-Check**.

## Using the Campaign Wizard

You can use the campaign wizard to create any type of campaign.

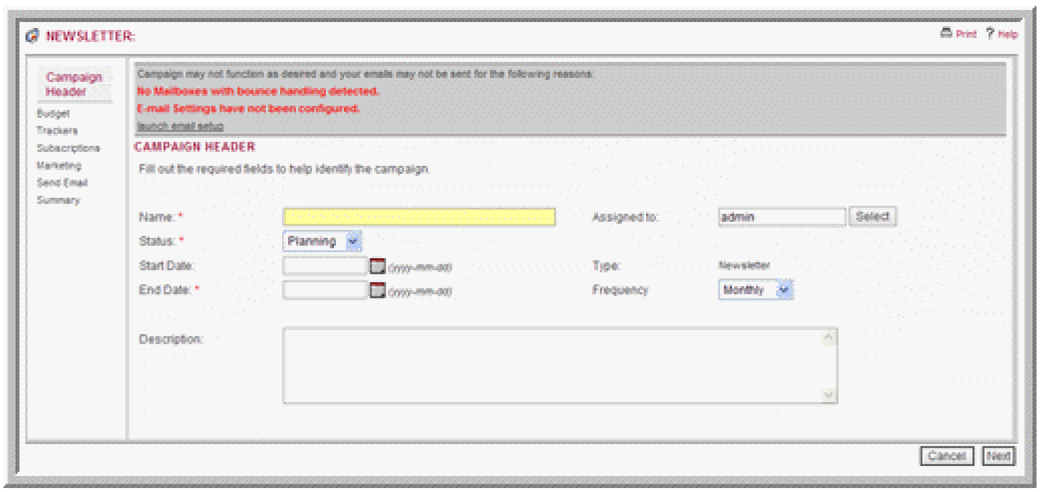
**To create a campaign using the Campaign Wizard**

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

The Campaign wizard displays.

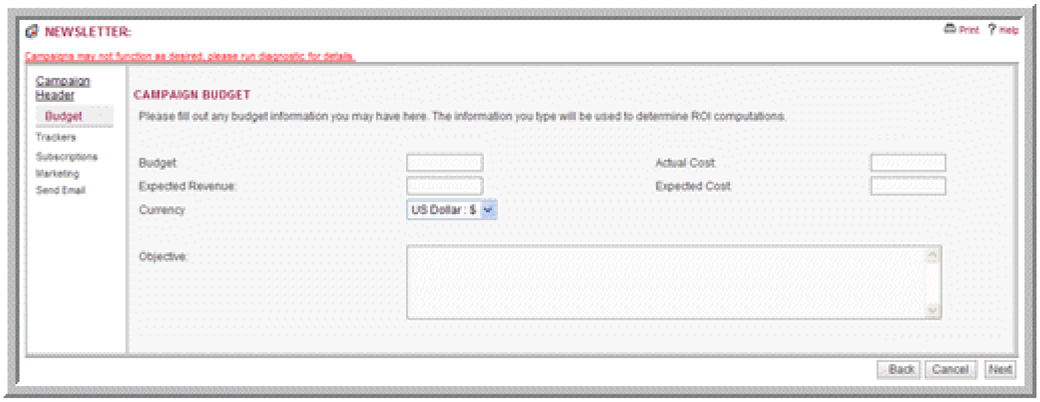

2. Select the type of campaign you want to create and click **Start**.

   The screen below illustrates a Newsletter campaign.



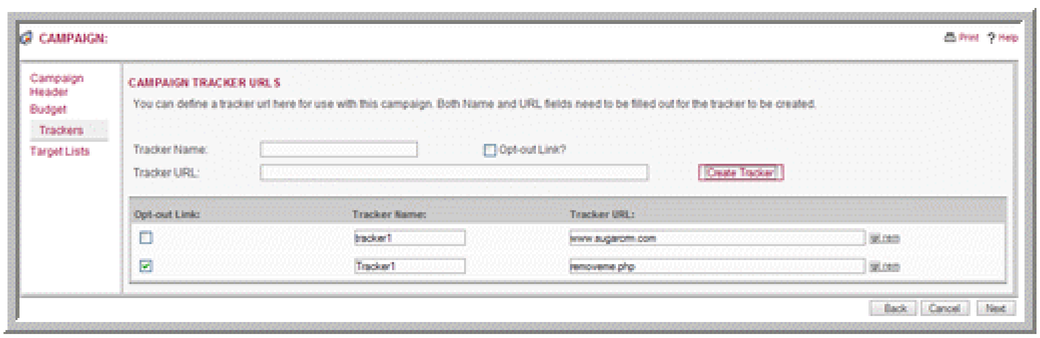

3. Enter information for the following fields:
   - **Name**. Enter the campaign name.
   - **Status**. From the drop-down list, select the current state of the campaign.
   - **Assigned to**. Enter the name of the user who is assigned to the campaign. To select from the Users list, click **Select**. By default, it is assigned to you.
   - **Type**. If you are creating a non-email campaign, select the campaign type from the drop-down list.
   - **Frequency**. This field displays only for newsletter campaigns. From the drop-down list, select the intervals at which the newsletter will be emailed to targets.
   - **Start Date**. Enter the campaign start date; click the Calendar icon to select the date.
   - **End Date**. Enter the campaign end date; click the Calendar icon to select the date.
   - **Description**. Optionally, enter a brief description of the campaign.

   Click **Next** to enter the campaign budget information




4. Enter information for the following fields:
   - **Budget**. Enter a numerical value for the campaign budget.
   - **Actual Cost**. Enter the actual cost of the campaign.
   - **Expected Cost.** Enter the expected cost of the campaign.
   - **Expected Revenue**. Enter the estimated revenue from the campaign.
   - **Currency**. From the drop-down list, select the currency used for the campaign.

   Click **Next** to enter the tracker URL information.




**Note:** If you need to go back to the previous step, click the **Back** button in the wizard. If you click the **Back** button on the browser, the system displays the previous page instead of the previous step.

5. Enter information for the following fields:

   **Tracker Name**. Enter a tracker name.

   **Opt-out link?** Select this box if you are creating an opt-out tracker that allows targets to unsubscribe from the newsletter mailing list.

   **Tracker URL**. Enter the tracker URL. For more information, see **"Creating Tracker Redirect URLs" on page 81**.

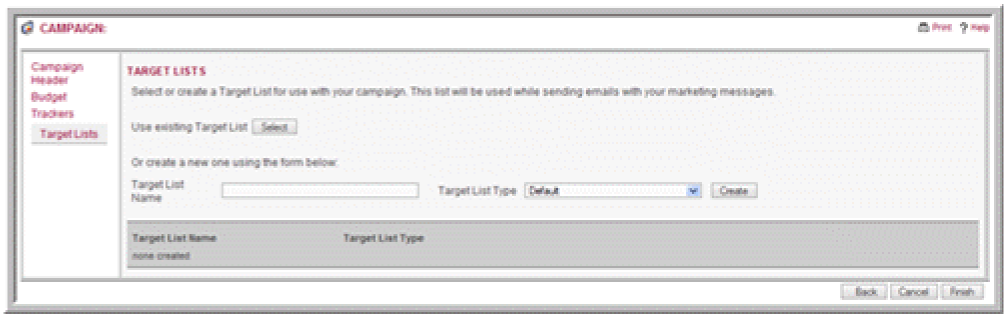
6. Click **Create Tracker**.

   The new tracker displays below.

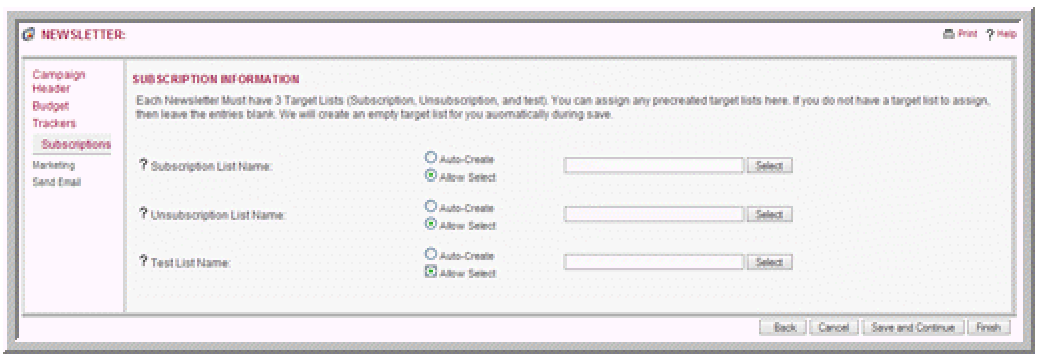
To create additional tracker URLs, click **Create Tracker** again and enter the new tracker information.

7. Click **Next.**

If you are creating an email campaign or a non-email campaign, the Target Lists screen displays.




If you are creating a newsletter campaign, the Subscription Lists screen displays.




a. To use an existing target list, click **Select** and use the Search panel to find the list.

b. To create a new target list, enter its name in the Target List Name field and select the type from the adjoining Target List Type field.

The target list name displays below.

8. For newsletters, you must create the following three subscription lists:
   - Subscription list: These targets receive the newsletter regularly.
   - Unsubscription list: These targets are those who have chosen to opt-out of your mailing list.
   - Test list: These targets are the recipients of the test email that you send out to ensure it is successful.

a. To create a custom list, select **Allow Select** and click **Select** to search for targets and create the list.

b. For a system-generated list, select **Auto-Create** and the system displays the name of the list in the field above the Select button.

9. To save the campaign information and begin the process of specifying other details such as the email settings, click **Save and Continue**. If you want specify the email settings later, click **Finish**.

When you click **Save and Continue**, the Marketing Email page displays. For more information, see **"Creating Email Marketing Records" on page 80**.

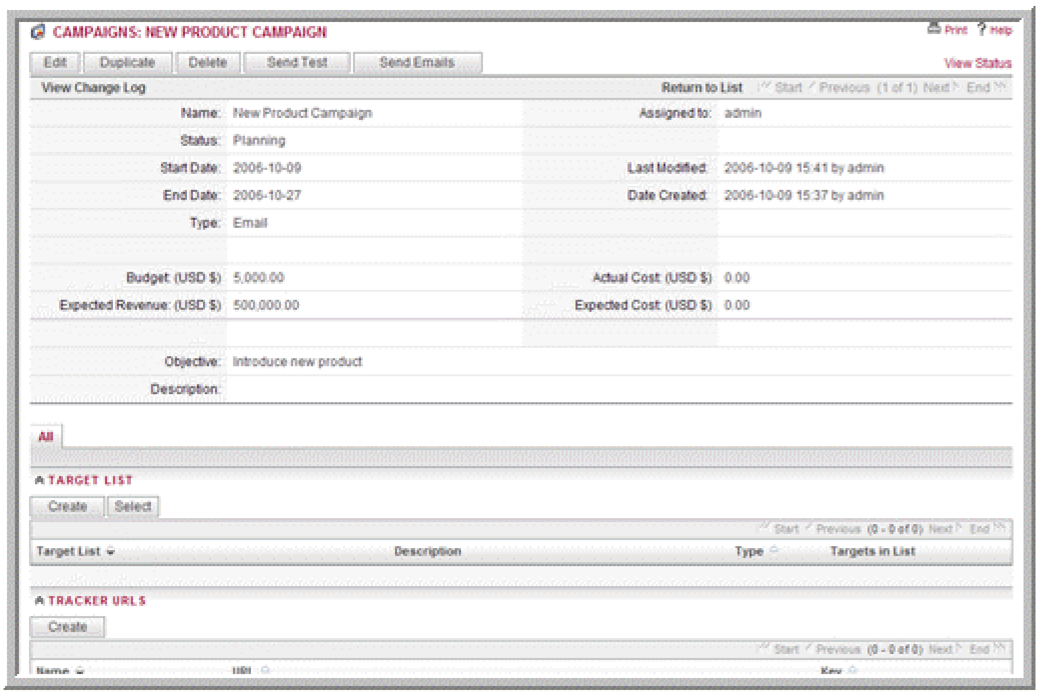
When you click **Finish**, the campaign's detail page displays.

You can edit the information and create an email marketing record from this page.

## Managing Campaigns

Managing campaigns includes tasks such as sorting, editing, and duplicating campaign information.

- To sort the list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To update information for some or all campaigns, on the Campaigns home page, use the Mass Update section as described in **"To edit or delete multiple records" on page 20**.
- To view the campaign's details, click the campaign name on the list. From the detail page, you can create Tracker URLs and Email Marketing Records for email campaigns. For more information on email campaigns, see **"Executing an Email Campaign" on page 79**.




- To edit the campaign information, on the Detail page, click the **Edit** button.
- To duplicate the campaign information, on the Detail page, click **Duplicate**.
- To delete a campaign, on the Detail page, click the **Delete**.
- To test a campaign email before sending it out, click **Send Test** and on the Campaign Send page, select the message and click **Send**.
- To queue emails for campaign launch, click **Send Emails**.

- To send out the campaign message to the target audience, click **Send**, and on the Campaign Send page, select the message and click **Send**.
- To view the campaign status, see **"Viewing Campaign Status" on page 88**
- To track changes to a campaign over time, in the detail view, click the **View Change Log** link.
- To export information on one or more campaigns, select them in the Campaign List sub-panel on the Campaigns Home page, click the **Export** icon, and export them as described in **"To export data from Sugar Suite" on page 110**.
- To view or manage related records in a sub-panel, see **"To manage related information in sub-panels" on page 19**.

### Viewing Campaign Status

After you launch a campaign, you can view the campaign status to determine its success. From a campaign's detail page, you can view the status and the result of the campaign such as the number of generated leads and the return on investment (ROI). You can use this information to take further action. For example, you can add targets that opted out of the campaign to the Unsubscription target list to ensure that they are not recipients of campaign emails in the future.

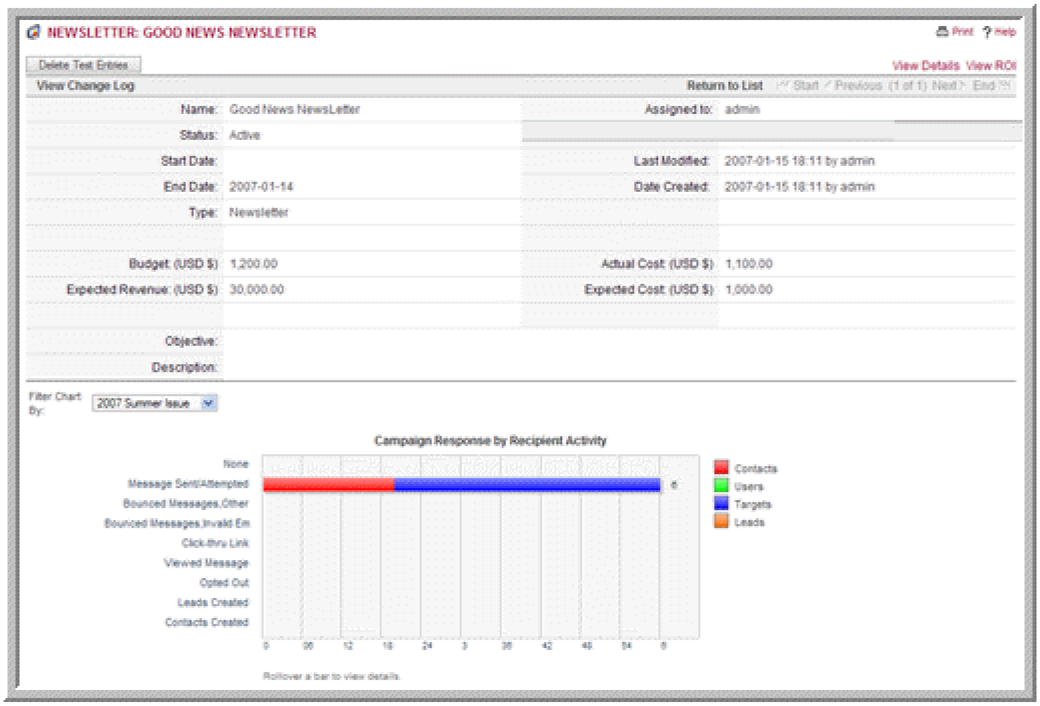

The sub-panels displays the following information:

- A chart depicting the responses from campaign targets. This includes how many targets viewed the message, how many open any links that were included in the campaign email, and how many opted out of the campaign
- A list of any campaign emails are still in the queue to be sent out.
- A list of processed campaign emails.
- A list of targets who viewed the campaign email.
- A list of targets who viewed any links that were included in the campaign email.
- A list of leads that were created as a result of the campaign. These leads are created when a target identifies the campaign and, as a result, is converted into a lead.
- A list of contacts that were created as a result of the campaign. These contacts are created when a lead identifies the campaign and, as a result, is converted into a contact.
- A list of campaign emails that bounced back because of invalid email addresses. Note that this information is tracked only if your administrator has scheduled a job to track bounced emails.
- A list of campaign emails that bounced back for other reasons.
- A list of targets that opted out of the campaign.
- A list of opportunities that were generated from the campaign.

**To view campaign status**

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

   The system displays the campaign's status.



2. To return to the Campaigns home page, click **Return to List**.
3. To view the status of the first campaign on the Campaigns list, click **Start**.
4. To view the status of the campaign prior to the one you are viewing currently, click **Previous**.

### Viewing a Campaign's Return on Investment (ROI)

For each Web-based campaign that you execute, Sugar Suite provides an embedded ROI report based on the opportunities generated from the campaign. You can view this report from the campaign's detail page.

**To view a campaign's ROI report**

1. On the Campaign's detail page, click the View ROI option that is located next to the View Status option.
2. The ROI report displays.

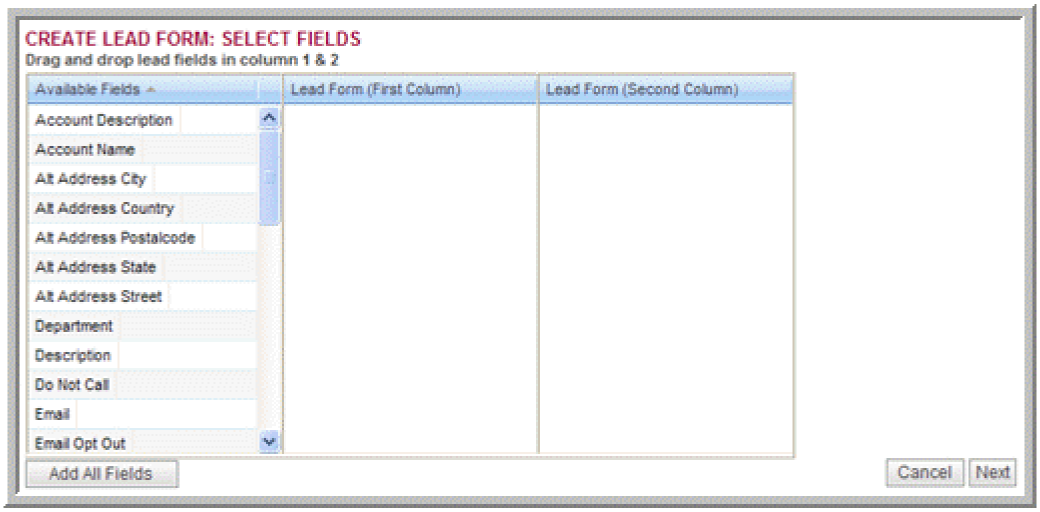
## Creating Web-to-Lead Forms

To capture leads from Web-based campaign or other Web-based sources such as your Website, you can create a Web-to-Lead form. When campaign targets fill in the form and submit it, the system saves it as lead information in the Sugar database. You can then use this lead information to generate more opportunities for your organization.

When you generate a Web-to-Lead form, it is saved to the cache/generated_forms folder, from where you can copy it to other locations. You can view and edit generated forms in the FCKEditor. To add new fields to the form, the administrator must first create new fields for the Leads module in Studio so that users can select them when they create the form.

**To create a lead form**

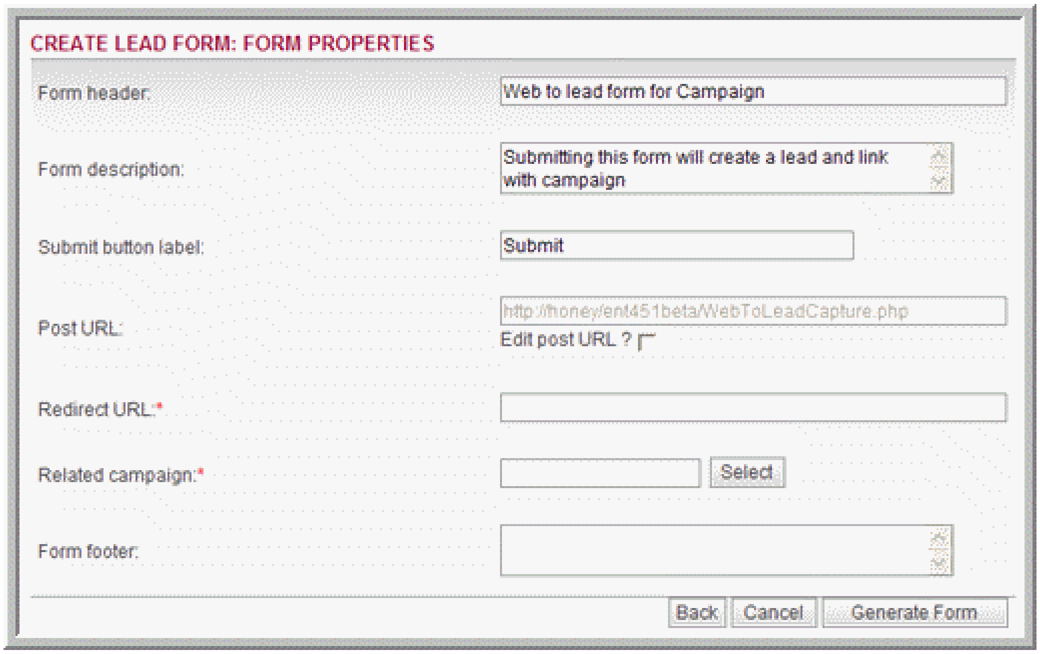
1. In the Shortcuts menu of the Campaigns module, click Create Lead Form.




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

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

4. The Form Properties page displays.




5. Enter information for the following fields:

   **Form header**. The default header displays. You can delete it and enter the desired header information.

   **Form description**. Enter a brief description of the form.

   **Submit button label**. The default label displays. You can delete it and enter the desired label.

   **Post URL**. The default location where the lead information will be stored displays. To edit this information, select the Edit post URL? box and then enter the new location.

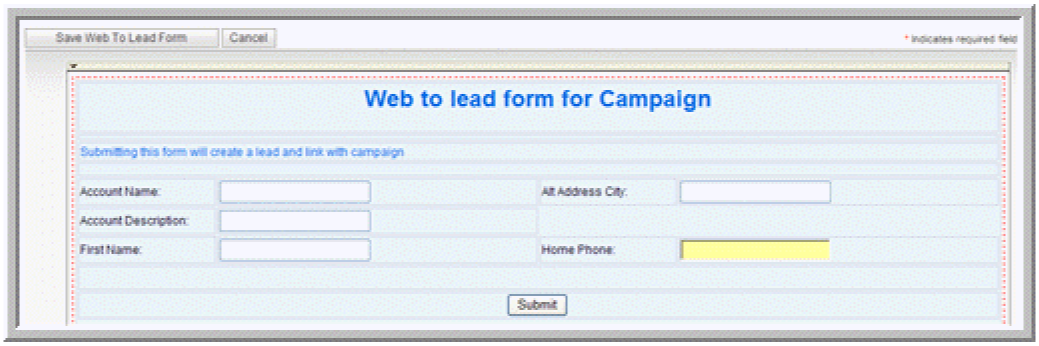
   **Redirect URL**. Enter the redirect URL. For more information, see **“Creating Tracker Redirect URLs” on page 81**.

   **Related campaign**. Enter the name of the campaign that is related to this lead form. To select a the Campaigns list, click Select.

   **Form footer**. Enter the form footer, if needed.

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

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




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

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

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

8. To view the form, click the **Web To Lead Form** link at the top of the page.

## Performing a Mail Merge

You can create a form letter template for campaigns using the Sugar Plug-in for Microsoft Word and merge it with your target list to create personalized letters for each target. Typically, you perform mail merge for non-email campaigns.

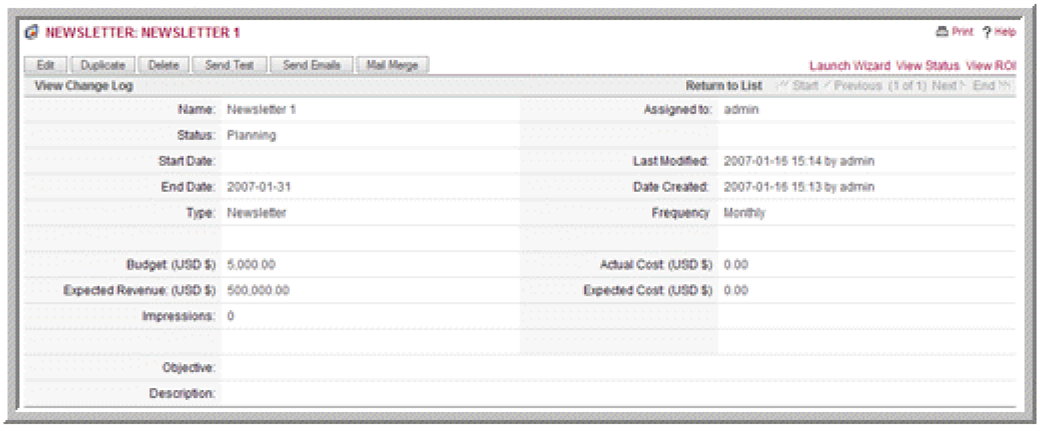
**Note:** You must purchase a license for Sugar Plug-in for Microsoft Word.

The process of performing a mail merge is as follows:

1. Ensure that your Administrator has enabled the Mail Merge option for your organization. Also ensure that you have enabled the Mail Merge option on your My Account page.
2. Define a template in Sugar Plug-in for Microsoft Word and upload it to Sugar Suite.
3. In the Campaigns module, create the campaign.
4. Create your target list and populate it with targets from your list of contacts, leads, and targets. To notify your manager or other team members, you can also add individuals from the Users list.
5. Perform the Mail Merge.

### To perform a mail merge

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



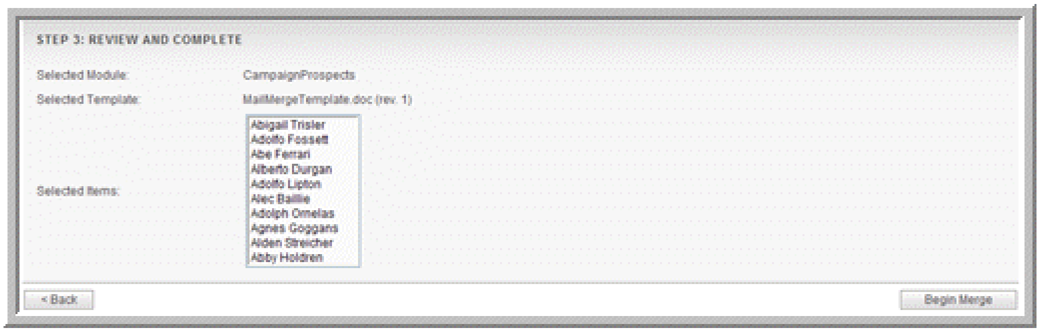

Step 1 of the Mail Merge process displays.The Campaigns module is already selected in the Selected Module drop-down list.


2. Select the mail merge template from the Select Template drop-down list and click **Next**.

   Step 2 of the Mail Merge process displays. The targets specified in your targets list display in the Available list.

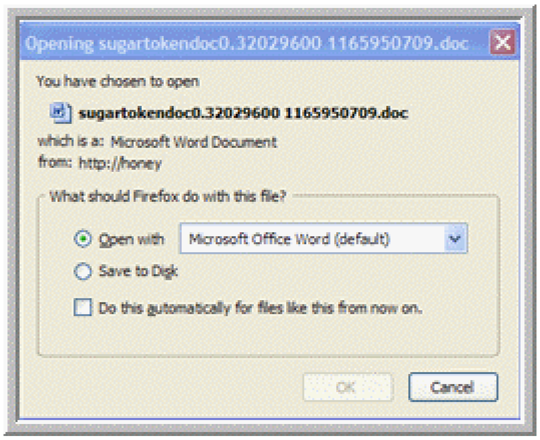

3. Select the targets in the Available list and using the right arrow, move them to the Selected list.
4. Click **Next**.

The final step of the Mail Merge process displays your selections for review. If you need to go back to the previous step to modify the target list, click **Back**.




5. Click **Begin Merge**.

   The following dialog box displays.



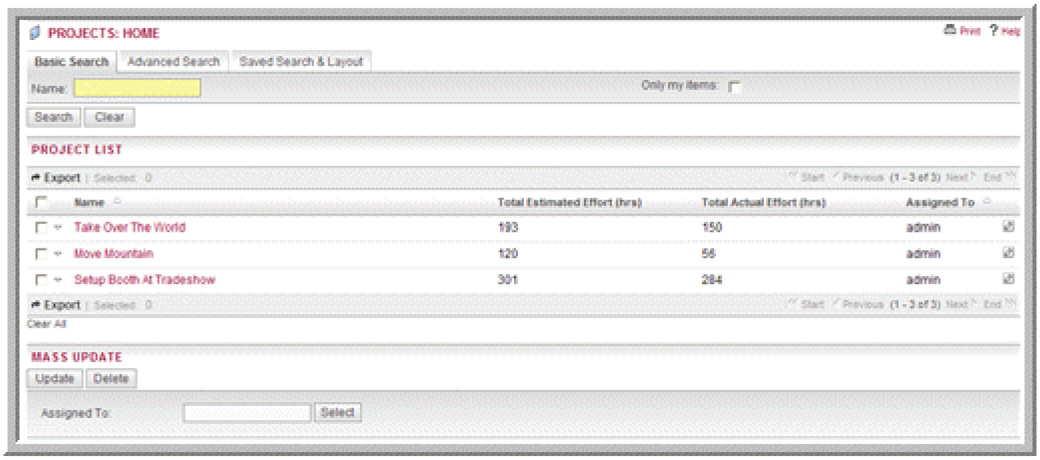

6. Ensure that Open with Word is selected and click **OK**.

   The merged document displays.

The system creates a log entry for each target for your records. You can view these entries when you click the **View Status** option on the campaign's detail page. If you perform mail merge operations for these campaign targets repeatedly, the system updates these log entries.

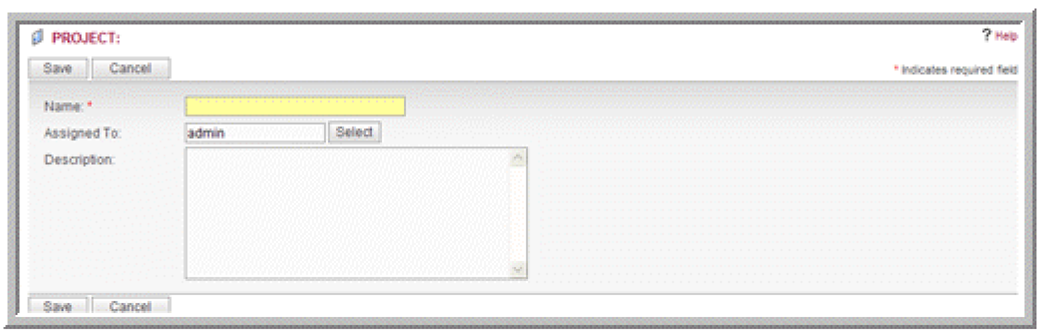
# Projects Module

Use the Projects Module to create and manage projects for your organization. A project can be associated with one or more Contacts, Accounts, and Opportunities.




### To create a project

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




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

   **Name**. Enter a name for the project.

   **Assigned to**. Enter the name of the user who has ownership of the project. By default it is assigned to you.

   **Description**. Enter a brief description of the project.

### To manage a project

1. To sort the list view, click any column title which has the icon beside it; to reverse the sort order, click the column title again.

1. To update or delete some or all of the projects in the Project List, use the Mass Update section as described in **"To edit or delete multiple records" on page 20**.

2. To view the details of a project, click its name in the list.

3. To edit the project details, click the **Edit** button.

4. To duplicate the project details, click the **Duplicate** button.

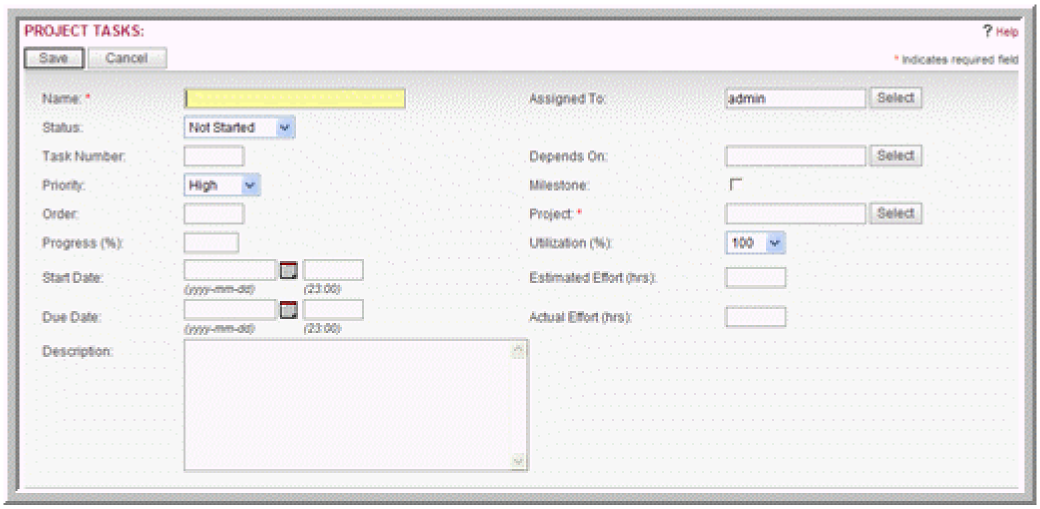
5. To delete the project, click the **Delete** button.
6. To create or manage related records in a sub-panel, see **"To manage related information in sub-panels" on page 19**.

## Creating Tasks for a Project

Typically, a project consists of multiple tasks that must be completed satisfactorily to ensure success. In Sugar Suite, after you create a project, you can create tasks associated with it. When you create a task, you specify information such as status, starting date, due date and the amount of time taken to complete it.

**To create a project task**

1. In the Shortcuts menu, click **Create Project Task**.




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

   **Name**. Enter a name for the task.

   **Assigned to**. Enter the name of the user who has ownership of the task. By default it is assigned to you.

   **Status**. From the drop-down list, select the current status of the task.

   **Task Number**. Enter a number for the task. A task number uniquely identifies the task. You can refer to a task by its number instead of its name.

   **Depends on**. From the drop-down list, select another task that will need to be completed before proceeding with this task.

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

   **Milestone**. Check this box if the completion on this task is considered a milestone for project completion.

   **Order**. Enter a number to specify the sequence of the task in the list of project tasks. Specifying the order is useful when a task does not have any dependencies assigned to it.

**Project**. From the drop-down list, select the project associated with the task.

**Progress (%)**. Enter the percentage of the task that has been completed.

**Utilization**. From the drop-down list, select the number of work hours that a user should dedicate their work hours towards the assigned task. Only one person can be assigned to a given Project Task.

**Start Date**. Click the Calendar icon and select a start date for the task; enter the start time in the adjoining field.

**Estimated Efforts**. Enter the sum of estimated efforts for all project tasks.

**Due Date**. Click the Calendar icon and select the due date for task completion; enter the end time in the adjoining field.

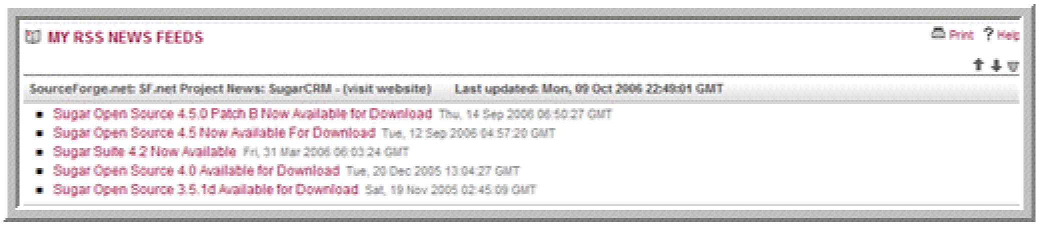
**Actual Efforts**. Enter the sum of actual efforts for all project tasks.

**Description**. Enter a brief description of the task.

3. Click **Save** to create the task; click **Cancel** to return to the project detail page without creating the task.

# RSS Module

Use the RSS Module to manage RDF Site Summary (RSS) feeds.



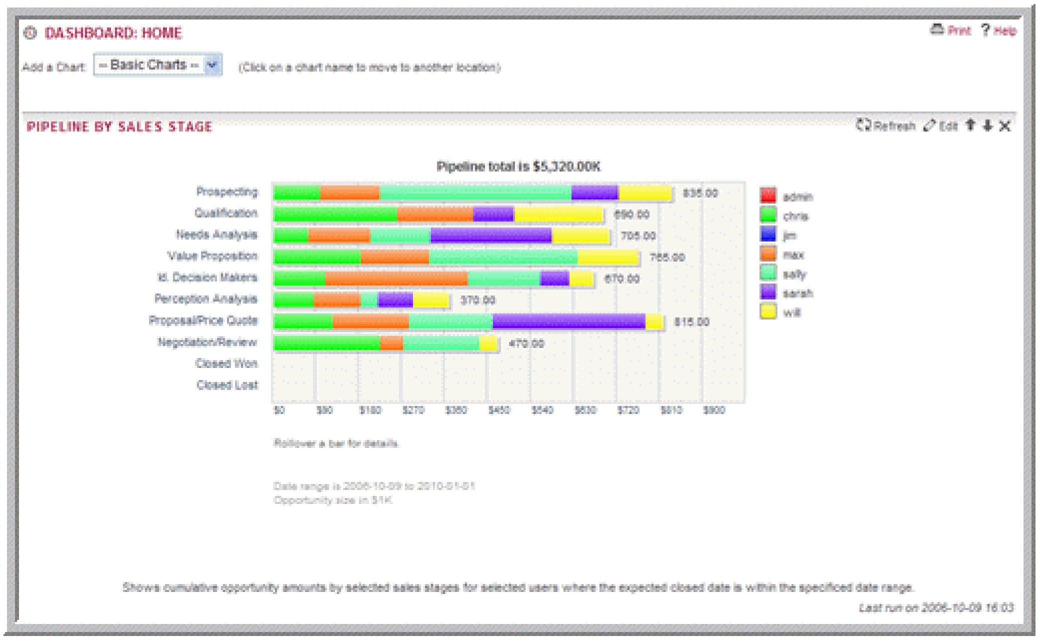

RSS feeds provide news or other web content that is syndicated by web sites which publish their content in this manner. Sugar Suite provides hundreds of RSS feeds. You can add more through the New RSS Feed quick data entry box on the My RSS News Feeds page. This page displays all the feeds that you have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

**To manage your RSS feeds**

- Use the , , and  controls to the right side of their header bar to promote, demote, or remove a feed from the *My RRS News Feeds* screen.
- Click on the name of the feed to see information items available from that feed. Each item listed has a brief title (which is linked to the full story or content) and the timestamp of when the item was added to the feed.
- Click on an item to see the full content in a new browser window.
- Click on *Website* to go to the website associated with that feed.
- On the *All RSS News Feeds* screen, a list of all or selected RSS News Feeds from a recent search is displayed. The RSS News Feeds list is paginated if it contains more items than are displayed on the screen. Controls are provided to go to the start or end of the list, or step to the next or previous page.
- Click on the Title for any RSS News Feed to display the information items currently available from that feed.
- Use the controls, to add or remove a RSS News Feed from your list of favorites.

# Dashboard Module

Use the Dashboard Module to view and manage predefined charts.




A chart is a graphical display of report output.

## Customizing Predefined Charts

Sugar Suite provides several charts based on predefined reports. You can use these charts to view sales and opportunities for your organization. Each distinctively colored area on a chart is linked to the data set that it represents. You can click any colored area to drill down to the underlying data. To enhance performance, the system does not automatically recalculated chart data each time you click the Dashboard tab. To recalculate the data source for a specific chart, click the associated Refresh button above the chart.

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

Sugar Suite provides the following predefined charts:

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

### To customize a predefined chart

1. On the Dashboard home page, click the **Edit** icon on the top right corner of the chart.

   A dialog box displays the details of the report on which the chart is based. You can edit the details if necessary.


2. To view the updated chart, click **Select**.
3. To close the dialog box, click **Cancel**.

### To manage charts

1. To recalculate the data source for a specific chart, click the associated **Refresh** button above the chart.
2. To change the order in which the charts are displayed, use the associated Up and Down arrows above the chart. Alternatively, select the chart title and drag and drop the chart at the desired location.
3. To remove a chart from the dashboard, click the icon next to the down arrow.
4. To add a chart back on the dashboard, select it from the Add a Chart drop-down list.
5. To set the display quality, zoom the image, or print the chart, right-click on the chart and select the appropriate option.
6. To copy a chart for inclusion in a document, take a screen copy (such as by using **Alt-PrtScn** on Windows) and then crop the captured image in an image editor such as Photoshop.

# Forums Module

Use this module to create forums as a means of collaboration on general, technical, or sales topics among users within your organization.

**Note:** Forums is not a core module that is included when you install Sugar Suite. The administrator can download it to your machine from the project download section on *www.sugarforge.org*. Use the Module Loader to load it into the application as described in the *Sugar Open Source Administration Guide*.


Before you create a forum, you must create a topic for it. After you create a forum, you can create one or more threads of discussion on a specific opportunity, bug, or case. You can search for a thread from the Forums Home page.

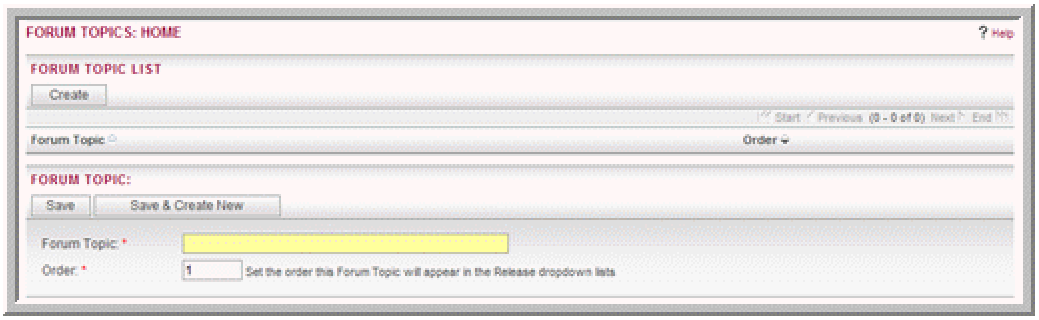
**Note:** Because a thread is specific to an opportunity, bug, or case, you can view it only from the detail page of the associated opportunity, bug, or case.

**To create a forum topic**

1. In the Shortcuts menu of the Forums home page, click **Create Forum**.


2. Click **Create Forum Topic**.

The Forum Topics Home page displays.




3. Click **Create**.

   Fields to create a forum topics display below.

4. Enter information for the following fields:

   **Forum Topic**. Enter the topic title.

   **Order**. Enter a number to specify the order in which it displays in the Topic drop-down list when you create a forum. For example, if you enter “2”, the topic will be the second one from the top in the drop-down list.

   Click **Save** to create the topic; click **Save & Create New** to save the topic and create another one.

**To create a forum**

1. Select the Forums module tab.
2. On the Forums Home page, click **Create Forum** in the Shortcuts menu.
3. Enter information for the following fields:

   **Title**. Enter a name for the forum.

   **Topic**. From the drop-down list, select a topic.

   **Description**. Enter a brief description of the forum.

4. Click **Save** to create the forum; click **Cancel** to exit the page without creating the forum.

   The new forum is now listed on the Forums Home page under the topic name. You will need to view the forum’s detail page in order to create a thread.

**To create a thread**

1. On the Forum’s detail page, click **Create New Thread**.
2. On the Threads page, enter information for the following fields:

   **Title**. Enter a topic title for the thread.

   **Sticky**. Select this box to create a sticky thread.

   A sticky thread will always be at the top of the Thread list. When there are multiple stickies, the system lists the latest one at the top of the Thread list, followed by the others.

**Body**. Enter your comments on the topic.

To view and use the HTML editor, click the down-arrow below the Body field.

Highlight the text and click buttons on the toolbar to apply standard formatting options such as font face, size, bold, italics, indentation and color. Additional buttons insert rules, hyperlinks, pictures, table and display the HTML source code.

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

   The thread is now listed in the Threads List on the forum's detail page.

**To manage a forum**

- To search for thread or a posting, specify the title or the user in the Threads/Posts Search panel on the Forums Home page and click **Search**.
- To view the details of a forum, click its title from the list on the Forums Home page.
- To edit the information, on the detail page, click **Edit**, make the changes, and click **Save**.
- To delete a forum, on the detail page, click **Delete**.

# Chapter 4

# Import and Export

This chapter discusses how to import data from you previous CRM system or Contact Manager into Sugar Suite and how to export data from Sugar Suite to your local machine.

Topics include:

- **"Importing Data" on page 105**
- **"Exporting Data" on page 110**

## Importing Data

You can import data for the following: Targets, Leads, Opportunities, Notes, Accounts, and Contacts as follows:

- Accounts: Salesforce.com, ACT!2005, custom comma delimited files, and custom tab delimited files.
- Contacts: Salesforce.com, Microsoft Outlook, ACT!2005, custom comma delimited files, and custom tab delimited files.
- Leads: Salesforce.com, custom comma delimited files, and custom tab delimited files.
- Opportunities: Salesforce.com, custom comma delimited files, and custom tab delimited files.
- Targets: Custom comma delimited files, and custom tab delimited files.
- Notes: Salesforce.com, custom comma delimited files, and custom tab delimited files.

To import data from your previous CRM application or Contact Manager, you must first export the data from that application in a Comma Separated Values (.CSV) file format to your local file system. You can then use the import function within a specific module to import the CSV file data into Sugar Suite.

**Accounts and Contacts.** If you import a contact record that refers to an unknown Account, then a new contact record is automatically created for an account of that name. Note that when account records are created automatically in this fashion, they are empty. That is, they have associated contacts but no address or telephone information. Therefore, you will need to manually add those details later. To avoid this task, it is recommended that you import the account data first to create complete records with address and telephone information (and other information depending on your previous CRM system) and then import contact data.

If you are importing account data from another CRM system, then, typically, that system understands the distinction between a contact and an account – that one Account can have multiple contacts – and has separate data for each. However, you can only import contact data from a simpler Contact Manager application– such as Microsoft Outlook.

**Leads and Opportunities.** Typically, only full CRM system, such as Salesforce.com track leads and opportunities.

**Targets.** Targets, used in marketing campaigns, are stand-alone records that are not attached to contacts or leads. However, you can include contact, lead, and user records in a target list.

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

**To export contacts from your current contact manager**

The process below describes exporting contact information through Outlook 2003. Other systems tend to work in similar ways.

1. Under the File menu, select **Import and Export**.

   The Import and Export Wizard dialog box displays.
2. Select **Export to a file** and click the **Next** button.
3. Select the option to create a file of the type Comma Separated Values (Windows), and click 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. To confirm your intention to export this file, click the **Finish** button.

   Outlook 2003 creates a CSV file. To ensure that the data has been exported successfully, you can view the file using Microsoft Excel or a text editor.

Now you can import the contact data as described in **"To import data" on page 107**.

During import, ensure that you correctly map the names of the incoming fields with the names of the corresponding Sugar Suite fields. If you are importing from Outlook, a particularly important field mapping is the incoming Company field to the Account Name field within Sugar Suite. This is required to ensure that contacts are associated with the correct accounts.

**To import data**

1. In the Shortcuts menu of the module's home page, click **Import**.

   The first step in the import process displays.


2. Select one of the following as the data source:

   **Salesforce.com**. Select this option if the data file is located in the Salesforce.com.

   **Microsoft Outlook**. This option is available only for Sugar modules that are mapped to a corresponding module in Outlook. Select this option if the data file is located in Microsoft Outlook.

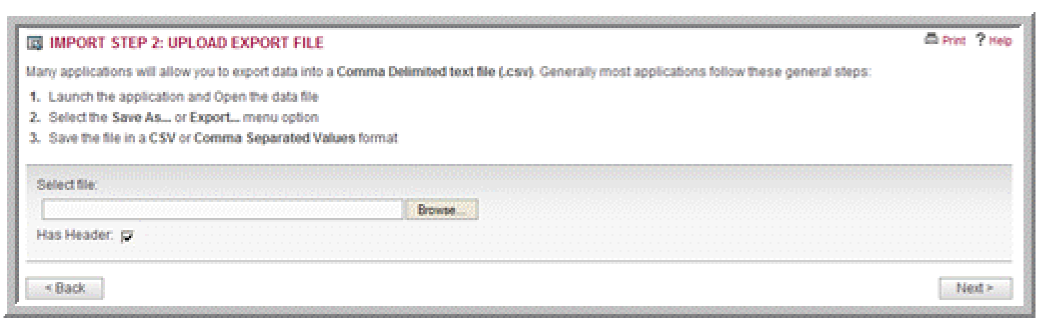
   **Act!2005**. This option is available only for Sugar modules that are mapped to a corresponding module in ACT. Select this option if the data file is located in the Act! 2005 database.**Custom Comma Delimited File**. Select this option if the data file is in .csv format.

   **Tab Delimited File.** Select this option if the data file is in a tab delimited format.

   **Custom Tab Delimited File.** Select this option if the data file is in TSV format.

3. Click **Next** to proceed to the next step in the import process.

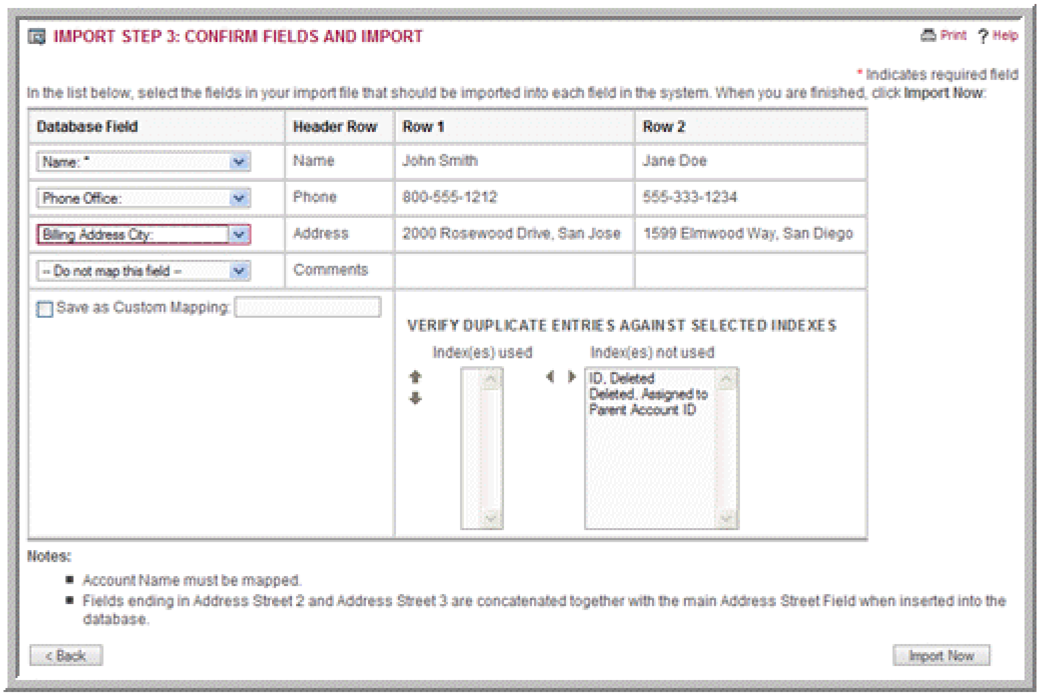
   You must now upload the file that you saved on your local file system.




4. In the Select file field, enter the path to the file location; or click **Browse** to navigate to the file location on your machine.
5. If the file has a header row, check the **Has Header** box.

   Typically, a header row contains column titles such as Name and Address.
6. Click **Next** to proceed to the final step in the import process.

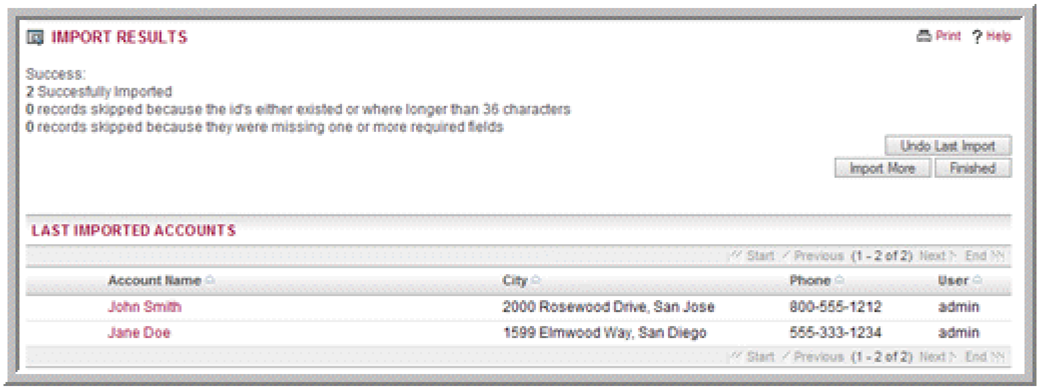
You must now map the fields from the export file to the fields in the Sugar Suite database to successfully import the data.




7. From the **Database Field** drop-down list, select the appropriate field in the note, such as Full Name and map it to the row in the imported source file. If you want to ignore a field, select **Do not map this field**.
8. To save the mapping as a custom mapping that you can use repeatedly, select the **Save as Custom Mapping** checkbox.
9. To check indexes for duplicate values for fields such as Account ID and Contact ID, move the desired indexes from the Index(es) Not Used column to the Index(es) Used column using the left arrow button.

   To remove an index that you do not want to check, use the right arrow to move it back to the Index(es) Not Used column. Use the up and down arrows to sort the order in which the indexes are checked for duplicates.
10. Click **Import Now** to import the data.

The Import Results page lists the imported data and lists how many fields were successfully imported and how many were skipped.




11. To import additional data, click **Import More**.
12. To end the task, click **Finished**.
13. If you do not want to save the imported data, click **Undo Last Import**; You can click **Try Again** to restart the import process.

**To import account data**

If you are importing account data from a CRM system, proceed to step 4. If you exported contact data, and need to massage it to act as account data to be imported, perform steps 1-4 below:

1. Copy your exported *contacts.csv* file and save it as *accounts.csv.*
2. Edit the *accounts.csv* file using Excel. First, sort the file on the column which contains the Company name.

   As you scroll through your data, sorted by company name, you may see successive records which have the same company name if there is more than one contact from that account (in Sugar Suite terminology). To avoid multiple copies of the same account within Sugar Suite, you need to delete the duplicate contacts. And to make sure that the most complete information is attached to the Account record, retain only the contact whose address and telephone information best represents the Account as a whole.

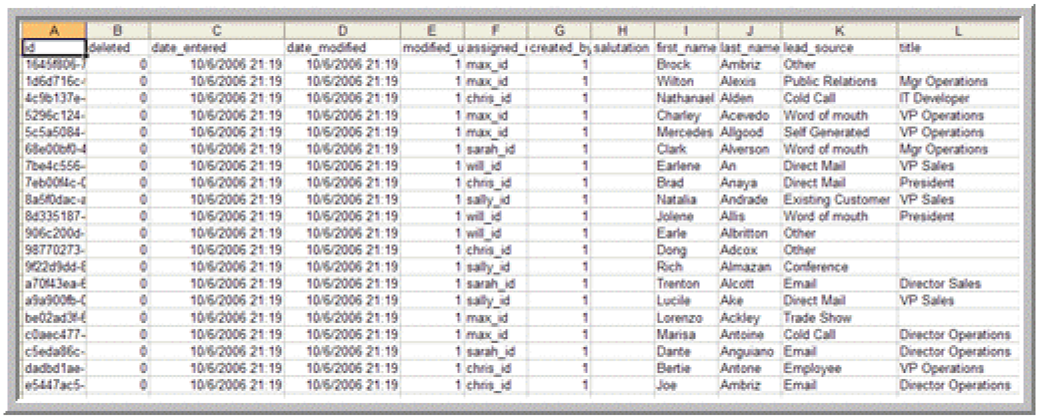
   Also look out for company names which are similar but not identical due to inconsistencies in the way the company name was entered – you should delete all duplicate records except the one with the company name spelt exactly how you want to see it in Sugar Suite.
3. Save the Excel file as a .csv file type.
4. In the Shortcuts menu of the Accounts module, click **Import** and follow the process described in **"To import data" on page 107**.

Now that account data has been imported, you can export contacts from your current Contact Manager and then import it into Sugar Suite.

# Exporting Data

You can export Sugar Suite item records in .csv format to your local machine. You can use Microsoft Excel, Notepad, or other text editors to open .csv files. You can export selected records, all records on the page, or the entire list.

A sample portion of a CSV file, exported from the Accounts module and viewed in Excel, is shown in below. The CSV file displays column titles, including the Record ID (a long string of letters and numbers used as a unique reference to each Account record) and other fields which Sugar Suite uses internally.



| A | B | C | D | E | F | G | H | I | J | K | L |
|---|---|---|---|---|---|---|---|---|---|---|---|
| id | deleted | date_entered | date_modified | modified_u | assigned_ | created_by | salutation | first_name | last_name | lead_source | title |
| 1645f806-7 | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | max_id | 1 | | Brock | Ambriz | Other | |
| 1d6d716c- | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | max_id | 1 | | Wilton | Alexis | Public Relations | Mgr Operations |
| 4c9b137e- | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | chris_id | 1 | | Nathanael | Alden | Cold Call | IT Developer |
| 5296c124- | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | max_id | 1 | | Charley | Acevedo | Word of mouth | VP Operations |
| 5c5a5084- | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | max_id | 1 | | Mercedes | Allgood | Self Generated | VP Operations |
| 68e00bf0-4 | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | sarah_id | 1 | | Clark | Alverson | Word of mouth | Mgr Operations |
| 7be4c556- | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | will_id | 1 | | Earlene | An | Direct Mail | VP Sales |
| 7eb00f4c-( | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | chris_id | 1 | | Brad | Anaya | Direct Mail | President |
| 8a5f0dac-a | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | sally_id | 1 | | Natalia | Andrade | Existing Customer | VP Sales |
| 8d335187- | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | will_id | 1 | | Jolene | Allis | Word of mouth | President |
| 906c200d- | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | will_id | 1 | | Earle | Albritton | Other | |
| 98770273- | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | chris_id | 1 | | Dong | Adcox | Other | |
| 9f22d9dd-6 | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | sally_id | 1 | | Rich | Almazan | Conference | |
| a70f43ea-6 | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | sarah_id | 1 | | Trenton | Alcott | Email | Director Sales |
| a9a900fb-( | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | sally_id | 1 | | Lucile | Ake | Direct Mail | VP Sales |
| be02ad3f-( | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | max_id | 1 | | Lorenzo | Ackley | Trade Show | |
| c0aec477- | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | max_id | 1 | | Marisa | Antoine | Cold Call | Director Operations |
| c5eda86c- | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | sarah_id | 1 | | Dante | Anguiano | Email | Director Operations |
| dadbd1ae- | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | chris_id | 1 | | Bertie | Antone | Employee | VP Operations |
| e5447ac5- | 0 | 10/6/2006 21:19 | 10/6/2006 21:19 | 1 | chris_id | 1 | | Joe | Ambriz | Email | Director Operations |

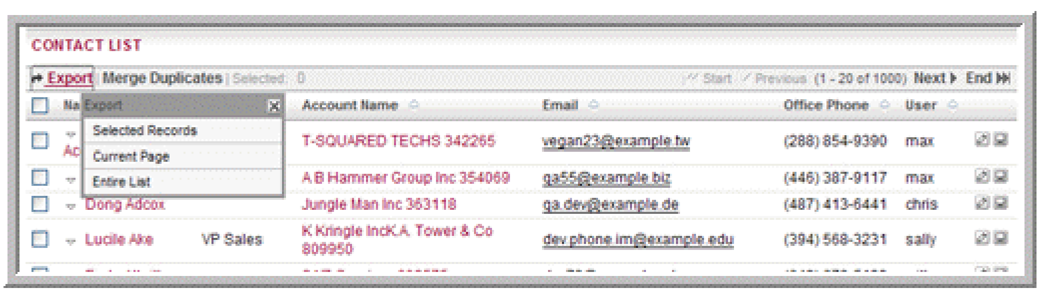
**To export data from Sugar Suite**

1. On the module's home page, click the **Export** icon located above the item list.
2. Select from the following Export options:

   Selected Records. To export one or more records in the list, select them, and then select this option.

   Current Page. To export all the records listed on the page, select this option.

   Entire list. To export all records on the list (which could be more than a page long), select this option.




3. In the File Download dialog box, select **Open** to open the export file in .csv format; click **Save** to save it on your local machine; click **Cancel** to exit the dialog box without saving the file.

# Index