SUGAR SUITE™

Sugar Open Source
Version 3.5

User Guide

SUGARCRM™

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This document is subject to change without notice.

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1.0 Welcome to Sugar Open Source

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

- Sugar Open Source provides integrated management of corporate information on customer accounts and contacts, sales leads and opportunities, plus activities such as calls, meetings, and assigned tasks.

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

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

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

1.1 About this Guide

This guide is current with the details of operation for Sugar Open Source 3.0. It is designed for users who are new to Sugar Open Source, or the areas of customer relationship management and web-based applications. The information in this guide describes how to use a personal computer and a web browser to access Sugar Open Source to perform a broad range of corporate information management tasks.

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

1.2 Who Should Read this Guide?

This *Sugar Open Source User Guide* provides information primarily for users who want to record and track company activities and outcomes. It contains additional notes and topics specifically for administrators who manage user access to the system.

This guide is not intended for system administration personnel who need to install and configure the system as part of its initial implementation.

2.0 About Sugar Open Source

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

The core features of Sugar Open Source include:

Customer Relationship Management:

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

Sales Force Automation:

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

Customer Service Tracking:

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

News Service:

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

Corporate Calendar:

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

Interface Consolidation:

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

Sugar Open Source 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.

2.1 What's New in this Version?

With each revision of the Sugar Open Source software, significant advances are made in both the feature set and usability of the software. Here are some of the highlights of version 3.5 of the software, as compared to the previous version, 3.0.

Module Loader:
Administrators can easily load and unload custom modules into the current installation.

Upgrade Wizard:
Administrators can easily upgrade full installations, patches, language packs and custom themes by uploading specific .zip files. The Upgrade Wizard manages the rest of the tasks for you.

Formatting in Email Module:
When creating email and email templates, an HTML formatting toolbar provides all the standard formatting options for fonts, size, color, and style. Additional buttons insert rules, hyperlinks, pictures, table and display the HTML source code.

Improved Sub-panels:
Sub-panels for modules include sorting and paging in lists and the collapsing of sub-panels for easier viewing capabilities.

History Summary View:
For modules that include a History sub-panel, users can click the Summary button to view history at a glance instead of clicking on each item for details.

View Change Log Link:
The View Change Log link displays the history of changes for the fields that track changes. The following modules contain fields tracked in the Change Log: Contacts, Accounts, Leads, Opportunities, Quotes, Products, Cases, Bug Tracker, Campaigns, Projects (Tasks).

3.0 Getting Started with Sugar Open Source

3.1 Before You Start

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.

3.1.1 Technical Requirements

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

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

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

  - Mozilla version 1.7 and higher - www.mozilla.org/mozilla1.x
  - Firefox version 1.0 and higher - www.mozilla.org/firefox
  - Konqueror version 3.2 and higher - www.konqueror.org
  - Microsoft Internet Explorer version 5 and higher - www.microsoft.com/ie

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

- **JavaScript and cookies support enabled in your web browser.**

  Both JavaScript and cookies support must be enabled in the security settings of your browser and is usually turned on by default.

  If you encounter problems accessing the system, check your browser configuration to ensure both JavaScript support and cookies support are enabled. Click *Tools* > *Internet Options* > *Privacy* and *Security* tabs in Internet Explorer, or *Tools* > *Options* > *Privacy* and *Web Features* tabs in Firefox.

- **Network access to a server that is running the Sugar Open Source 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 Open Source dynamically creates the HTML screens displayed by the web browser when you click certain buttons in the web pages.

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

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

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

Log In Information

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

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

3.2 Accessing Sugar Open Source

To access Sugar Open Source, type the URL into your web browser's address bar. A screen displays, similar to the one shown in Figure 1.

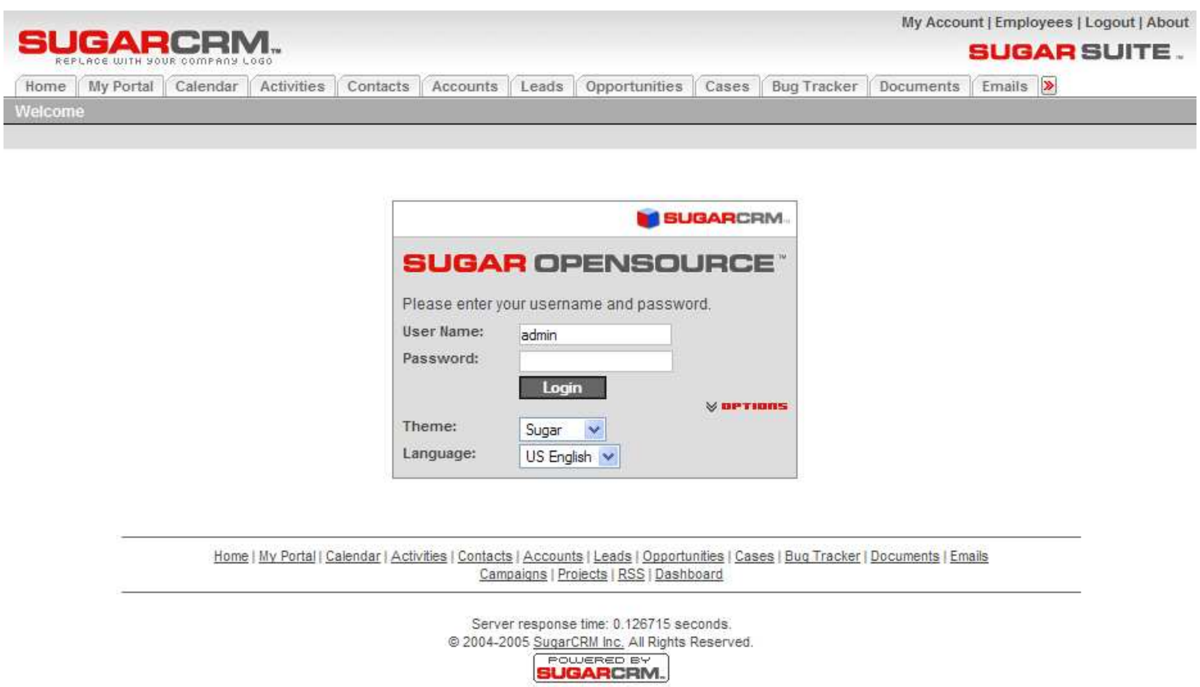

Figure 1: The Sugar Open Source Log In Screen

This is the Sugar Open Source log in screen. If you do not see a log in screen, verify that you have typed the URL correctly, or contact your system administrator to verify that you have the correct URL. To proceed, you must log in to the system by providing a valid user name and password.

You may also choose the language that you want to use when working in the system and the theme or visual appearance you want the system to have. Languages and themes can be found at http://www.sugarcrm.com/home/Download_Sugar_Sales/107/.

Logging in to the System

To log in to the system:

1. In the Sugar Open Source log in screen, type your user name in the User Name box.
2. Type your password in the Password box.
3. Select the language and theme that you want to use (if applicable).
4. Click the Log In button.

If you cannot log in, check the following:

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

Tip

System passwords are case sensitive. “John differs from “john”.

3.2.1 Security Timeout

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

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

3.3 Managing Your Password

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

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

Changing Your Password

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

To change your password:

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

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

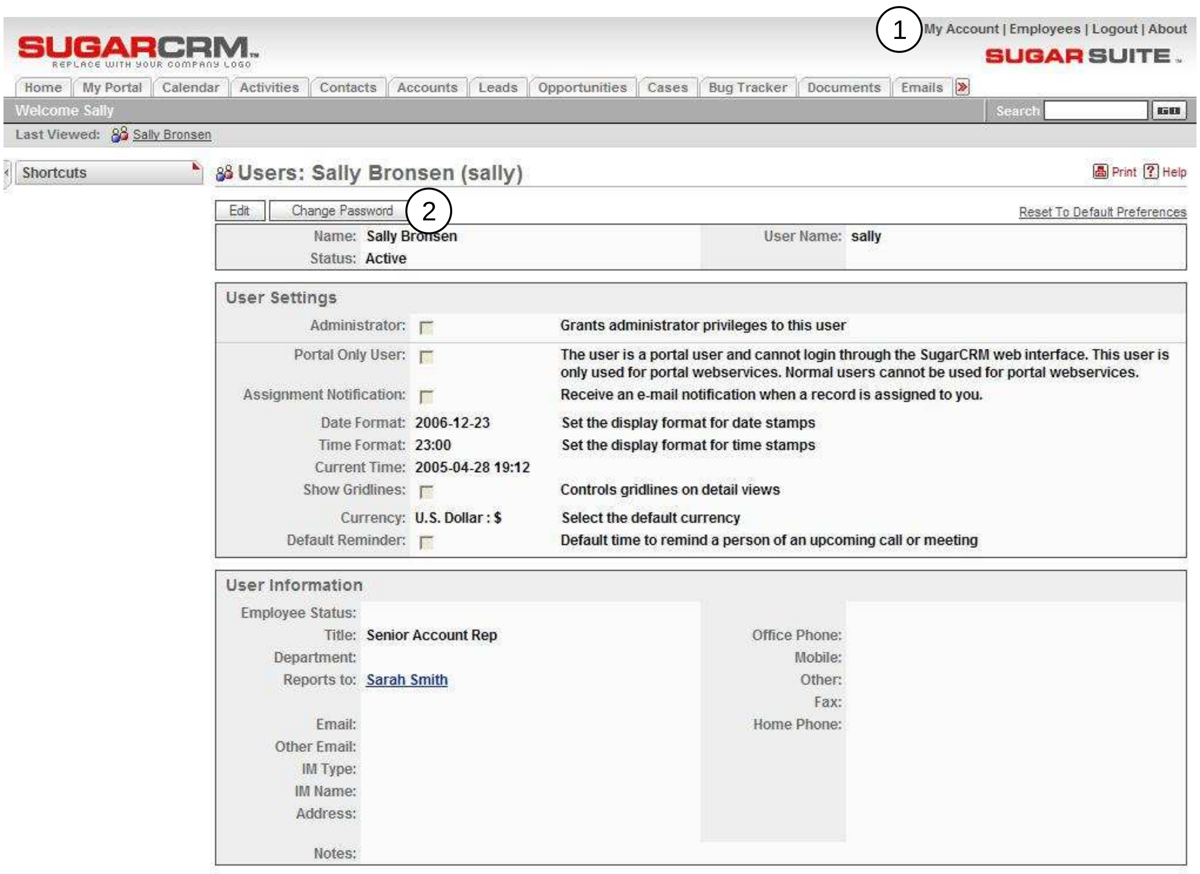

Figure 2: The 'My Account' Screen

3.4 The User Interface

When you log into the system, the Home tab displays, as shown below in Figure 3. Various key elements of the screen layout are highlighted on Figure 3, as follows:

1. Navigation Tabs: Click to choose a module to display. A dropdown menu lets you select other modules if you have more than 12 tabs.
2. Navigation Shortcuts Box: Specific shortcuts useful within each module
3. Last Viewed: A useful trail of recent records you have viewed
4. Search Box: Search for a text string within key data held by Sugar Open Source
5. System Links: My Account, Employees, Logout, and About. The Admin link is only available to users defined as administrators
6. Quick New Item Box: Quick data entry box to create a new item for the current module
7. Main Screen Body: On the Home tab, this includes Cases, Opportunities, Appointments, Leads, Tasks, monthly Calendar and Pipeline graph.

Figure 3: The Home Tab Screen

The screen layout in the Home tab uses the same layout as all of the other tabs. As you move between the tabs, the shortcuts change according to the specific tab, and the main screen body displays the information indicated by the tab name. The Quick New Item box changes to offer quick access for creating new items based on the tab, for example, New Contact, New Account, New Opportunity, and so on.

3.4.1 Modules

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

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

1. **Home**

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

2. **My Portal**

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

3. **Calendar**

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

4. **Activities**

   The Activities tab allows you to create or update scheduled activities, or to search for existing activities. By managing Activities within the context of an Account, Contact, Lead, Opportunity, or Case, the true value of Sugar Open Source becomes apparent. Sugar Open Source allows you to manage the myriad of calls, meetings, notes, emails and tasks that you need to track in order to get your job done.

   - Tasks are for tracking any action that needs to be managed to completion by a due date.
   - Notes allow you to capture note information as well as upload file attachments.
   - Calls allow you to track all of your phone calls with leads and customers.
   - Meetings are like calls, but also allow you to track the location of the meeting.
   - Emails allow you to archive sent or received email messages. If you use Microsoft Outlook, you can quickly archive email messages with the Sugar Plug-in for Outlook.

5. **Contacts**

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

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

6. **Accounts**

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

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

7. **Leads**

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

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

8. **Opportunities**

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

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

9. **Cases**

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

   Cases are the handoff between the sales department and the customer support department. Cases help customer support representatives manage support problems or inquiries to completion by tracking information for each case such as its status and priority, the user assigned, as well as a full trail of all related open and completed activities.

10. **Bug Tracker**

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

    Tracking software bugs is an important function of a customer support department. The Bug Tracker module helps customer support representatives manage software-related support problems or inquiries to completion by tracking information for each bug such as its status and priority, its resolution, the user assigned, the release of software involved, its type (defect or feature) as well as a full trail of all related open and completed activities.

11. **Documents**

    The Documents tab shows you a list of documents that you can download. You can also upload your own documents, assign publish and expiration dates, and specify which users can access them.

12. **Emails**

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

13. **Campaigns**

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

14. **Projects**

    The Projects tabs helps you manage tasks related to specific projects. You can track and manage tasks for a project. Tasks can be assigned to different users and assigned estimated hours of effort. As tasks are in progress and completed, users can update the information for each task.

15. **RSS**

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

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

16. **Dashboard**

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

Selecting a Module

To select a module when the Home tab displays:

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

> **Tip**
>
> The Module tab list is always available at the top of the browser window. Click one of the tabs in this list to switch modules.

3.4.2 Navigating the Module Screens

All of the Task module screens use the same basic layout – making it easy for you to move from one area of the application to the next. Figure 3 shows the Sugar Open Source screen with the Home tab as the selected Task module.

3.4.3 List View Screens and Searching

Most module screens (Home, Calendar and Dashboard are exceptions) have two key elements to them – a search filter capability at the top, and a list view of items below. As an example, look ahead to Figure 10, the Accounts module. Generally, the search filter has basic search fields, and a link to use the advanced search with more fields on which to filter the list of items below. You can see this Advanced link on Figure 10, on the right hand side of the Account Search area.

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

Using the system level search box (highlighted item 4 on Figure 3 above) is much the same, only it searches Contacts, Accounts, Leads, Opportunities and Cases, and looks for search text to match from the beginning of key fields for each, as below. Note: numeric search strings will match anywhere in a field. Then all matching records are displayed in a series of paginated lists.

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

Accounts: Account Name, Phone, Other Phone, Fax

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

Opportunities: Opportunity Name

Cases: Case Number, Subject

3.4.4 Detail View Screens

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

This listing of associated items as sub-panels is really the fundamental power of the Sugar Open Source system – the system associates and represents information in much the same way that your brain thinks, and lets you navigate or explore the information that way. Figure 4 below shows a sample detail view screen with the Open Activities, History, Contacts, Opportunities, Leads, Cases, Member Organizations and Bug Tracker sub-panels. You can click arrows to sort columns and page through lists and you can click buttons next to sub-panel headers to collapse or display subpanels.

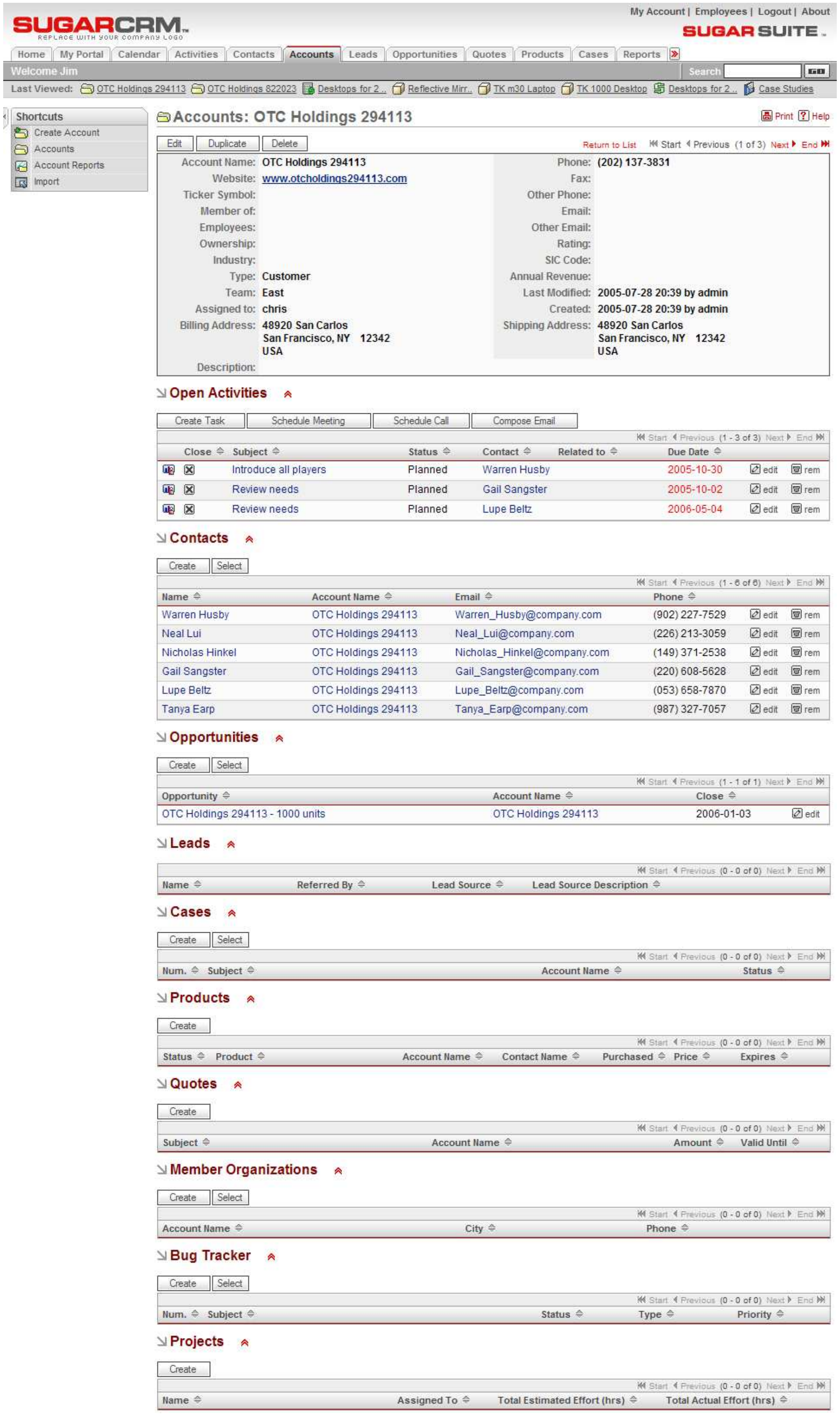

Figure 4: The Account Detail Screen

3.4.5 Printing and Help

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

3.5 Logging Out of the System

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

When you log out, the system performs several 'clean-up' procedures, and then automatically returns the web browser window to the Login screen.

To log out:

1. Click the Logout link in the User Management area *(see item 5, Figure 3)*, in the top right hand area of the screen.
2. Close the browser window.

4.0 Using Sugar Open Source

4.1 The Portal Module

Figure 5 shows the Sugar Open Source screen with the Portal module selected using the My Portal navigation tab:

Figure 5: The Portal Module

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

A set of shortcuts allows you to *Add Site*, *List Sites*, or to navigate to sites with shortcuts already created. The shortcuts include shortcuts you created to view Personal sites and shortcuts to Global sites created by the Administrator. To display the Portal screen list, click the *List Sites* shortcut. To delete a Portal site from the Portal List screen, click the checkbox next to the site and then click the *Delete* button below the list of Portal sites. You can also edit a Portal site by clicking on its name. To view its target web site, click the link to the URL.

To create a new Portal site, click the Add Site shortcut. When creating a new Portal site, you can type the name and web site, click to select if you want it to be currently visible or not. You might want to hide shortcuts without deleting them from the list. You can select whether the shortcut displays in the shortcut list, on the tab menu, or both. Administrators can select whether the site is Personal or Global. Global means that the shortcut is added for all users.

4.2 The Calendar Module

Figure 6 shows the Sugar Open Source screen with the Calendar module selected using the Calendar navigation tab:

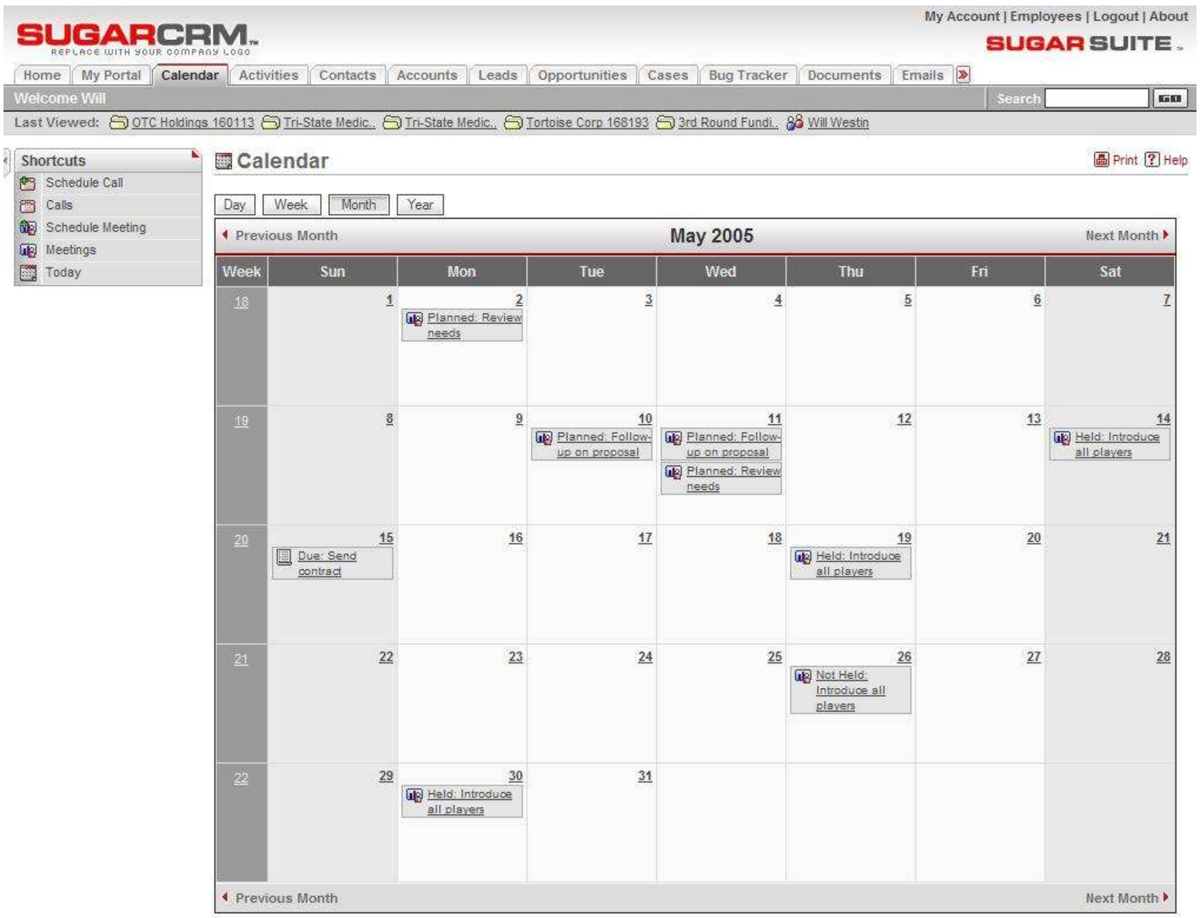

Figure 6: The Calendar Module (Month Format)

You can display your calendar by Day, Week, Month or Year by clicking on the buttons at the top left of the main screen. Month format is shown in Figure 6 above, and Day format in Figure 7 below. In each format, any planned activities with associated dates are displayed – such as Calls, Meetings, Tasks, Notes and Emails. Icons are used to indicate the type of activity: for a Call, for a Task, and for a Meeting. You may click on any activity in your calendar to edit that activity.

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

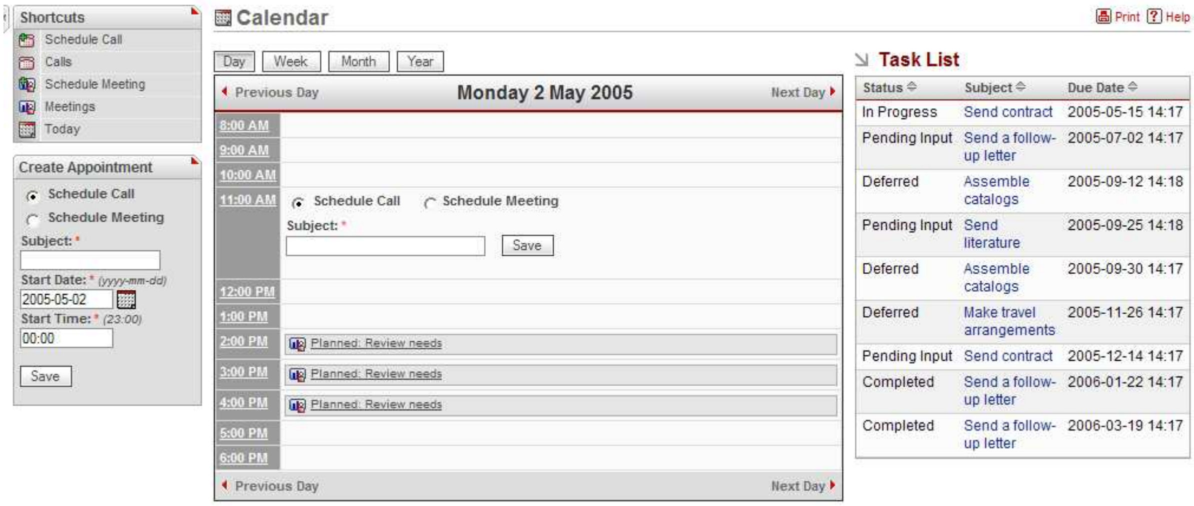

Figure 7: The Calendar Module (Day Format)

The Day display format has the hours of the day listed vertically. Clicking on a specific time displays a quick method of scheduling a Call or Meeting, as shown in Figure 7 above.
The Day display format also includes a task list on the right side of the main screen body. Click the subject of a task in the list to view the details of that task.

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

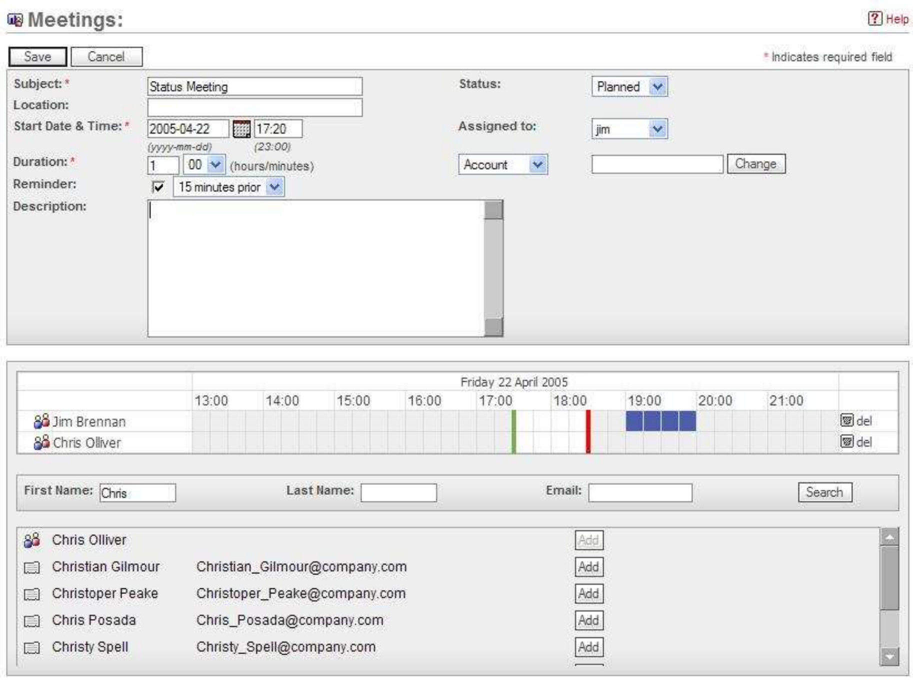

Figure 8: The Calendar Module (Schedule Meeting)

4.3 The Activities Module

Figure 9 shows the Sugar Open Source screen with the Activities module selected using the Activities navigation tab:

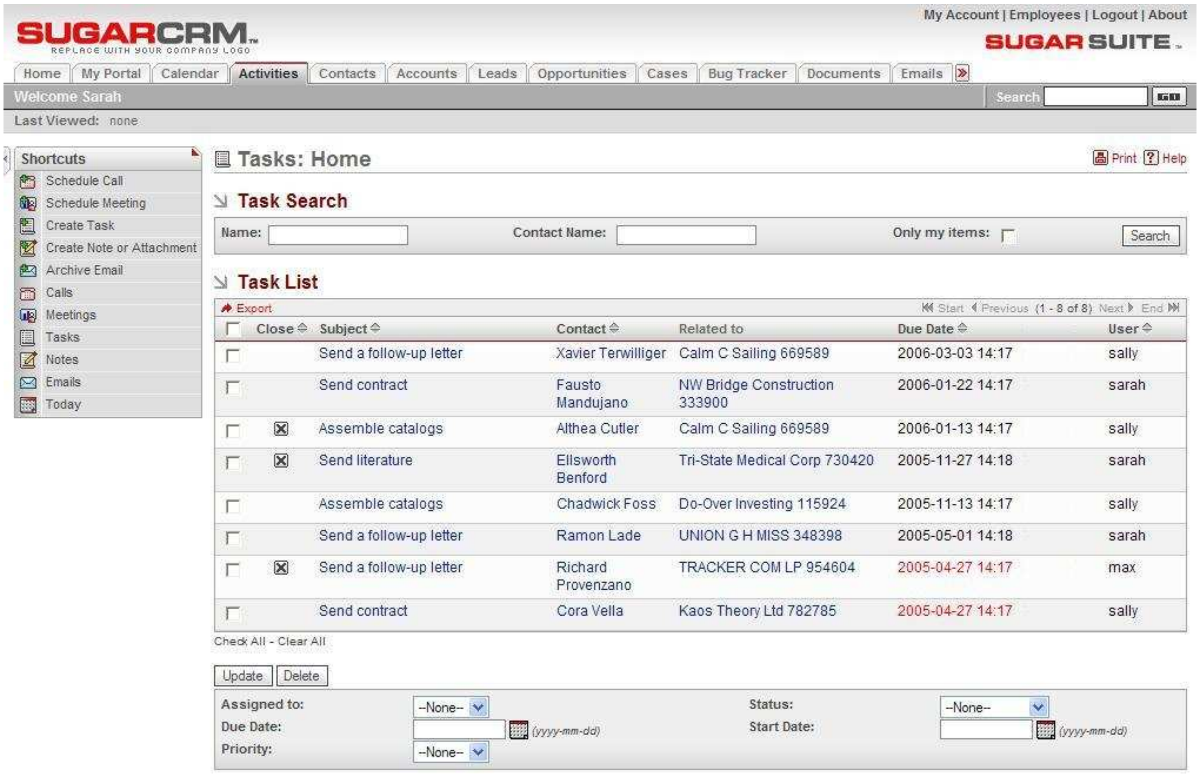

Figure 9: The Activities Module (Task List View)

The Activities module allows you to create a new Call, Meeting, Task, Note or Email, by using shortcuts in the navigation shortcuts box. As well, you may select different list views for Calls, Meetings, Tasks, Notes or Emails, using the navigation shortcuts box. Figure 8 illustrates the Task List view mode. Each of the list views typically provides a list of all or selected items from a recent search. Each item in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all checked items.

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

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

4.4 The Contacts Module

Figure 10 shows the Sugar Open Source screen with the Contacts module selected using the Contacts navigation tab:

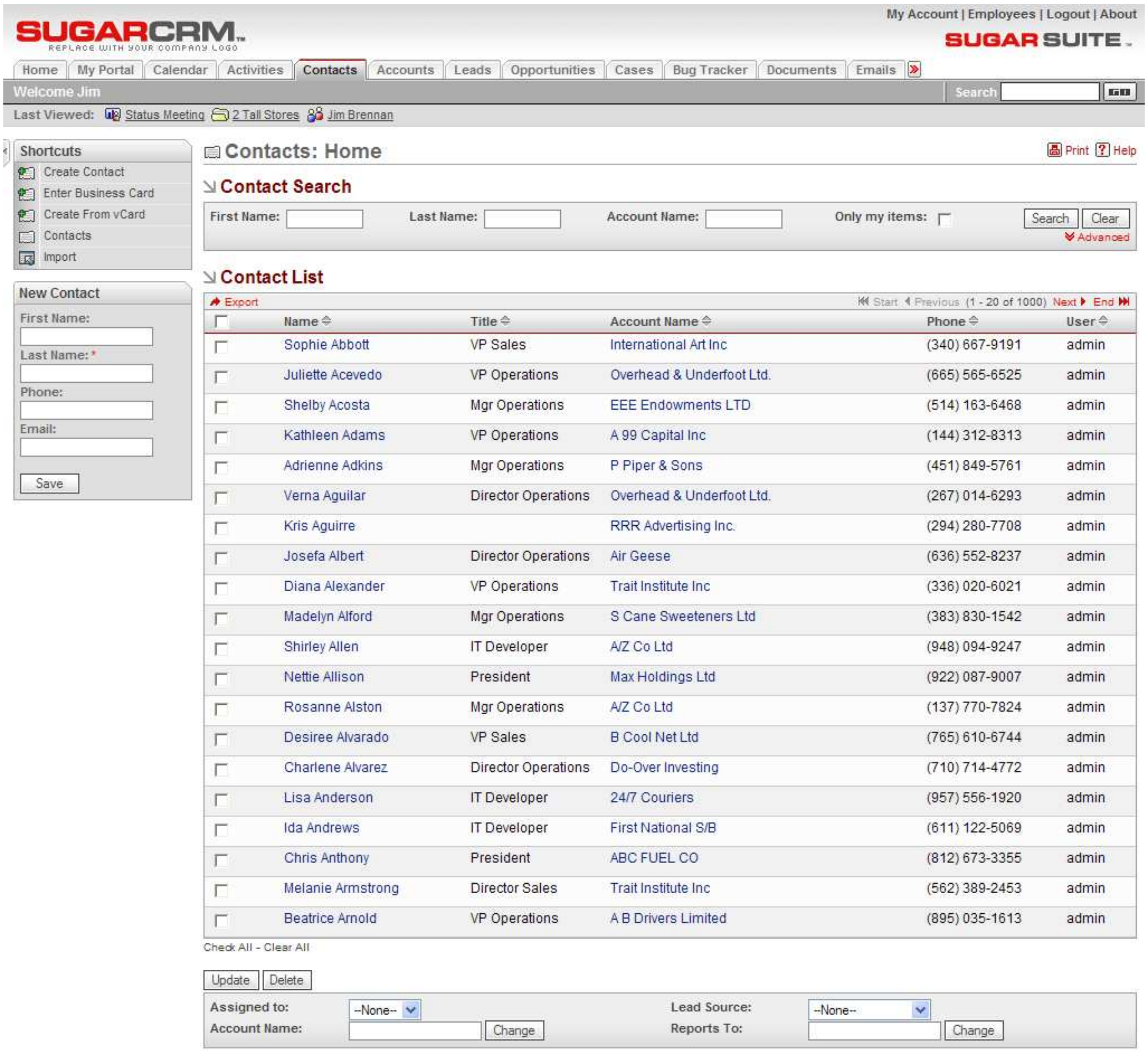

Figure 10: The Contacts Module

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

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

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

In the History sub-panel, click the Summary button to view history information at a glance instead of selecting each item to view.

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

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

4.5 The Accounts Module

Figure 11 shows the Sugar Open Source screen with the Accounts module selected using the Accounts navigation tab:

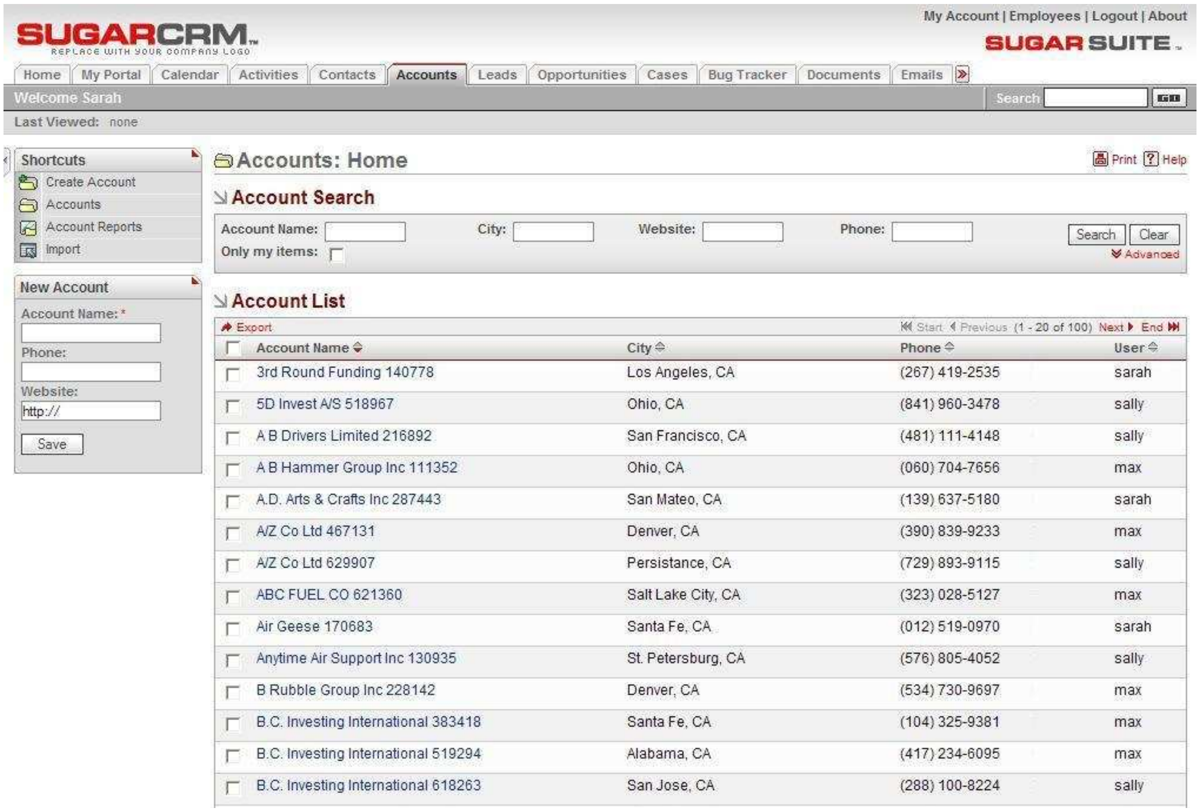

Figure 11: The Accounts Module

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

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

The Account list is paginated if it contains more items than may be listed on the display. Controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any account in the list displays the detail information for that account. Click the View Change Log link to view the old and new values for fields that track changes. The tracked fields include Assigned User, Member Organization assignment, Fax, Email Address, and Team. In the History sub-panel, click the Summary button to view history information at a glance instead of selecting each item to view.

The navigation shortcuts provided help you create a new account, or switch back to the Account List view. As well, an Import facility is provided, to import bulk account data from Salesforce.com, ACT!, or other applications. You can assign accounts to other users and describe accounts by Type and Industry.

4.6 The Leads Module

Figure 12 shows the Sugar Open Source screen with the Leads module selected using the Leads navigation tab:

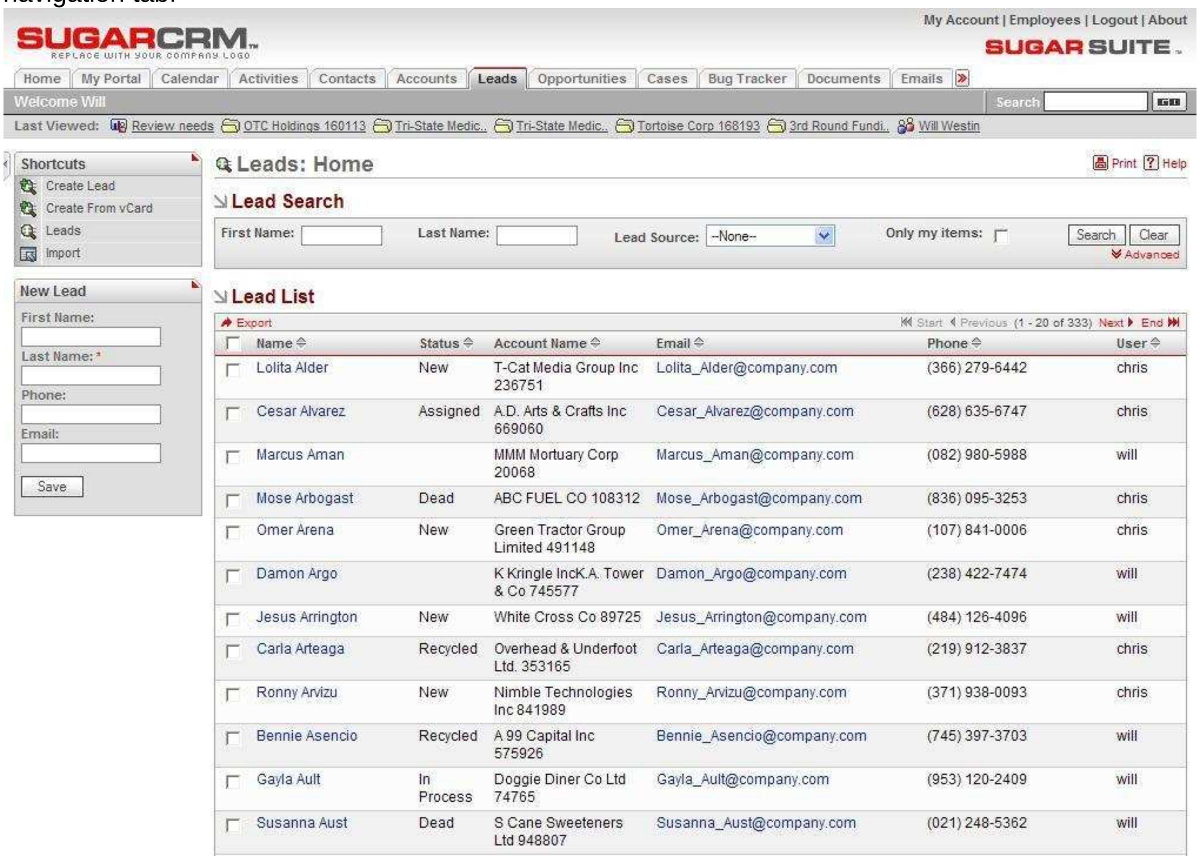

Figure 12: The Leads Module

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

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

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

The Leads module provides a list of all or selected Leads from a recent search. The Leads list may be sorted by clicking on any column title which has the icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order. Each lead in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all selected leads.

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

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

4.7 The Opportunities Module

Figure 13 shows the Sugar Open Source screen with the Opportunities module selected using the Opportunities navigation tab:

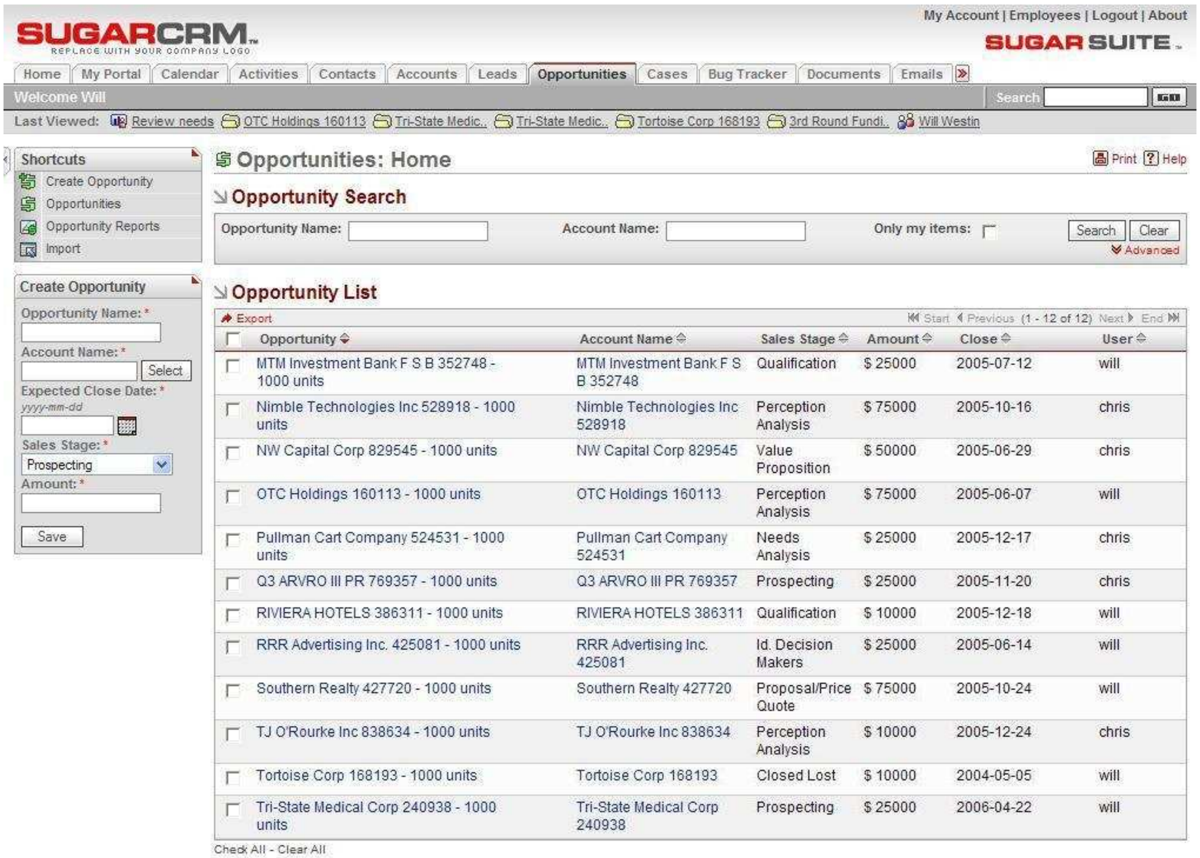

Figure 13: The Opportunities Module

Opportunities represent potential sales opportunities that you want to manage into becoming sales. You can change the values for the amount, the current sales stage and probability of closing. You can assign opportunities to other users. The Opportunities module provides a list of all or selected Opportunities from a recent search. The Opportunities list may be sorted by clicking on any column title which has the ≑ icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order. Each opportunity in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all selected opportunities.

The Opportunities list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any opportunity in the list displays the detail information for that opportunity. Clicking on the account name for an opportunity links to the detailed information for that account. Click the View Change Log link to view the old and new values for fields that track changes. The tracked fields include Assigned User, Team, Type, Amount, Date Closed, Sales Stage, and Probability. In the History sub-panel, click the Summary button to view history information at a glance instead of selecting each item to view. The navigation shortcuts provided help you create a new opportunity, or switch back to the Opportunity list view. As well, an Import facility is provided, to bring in bulk opportunity data from Salesforce.com, or other applications.

4.8 The Cases Module

Figure 14 shows the Sugar Open Source screen with the Cases module selected using the Cases navigation tab:

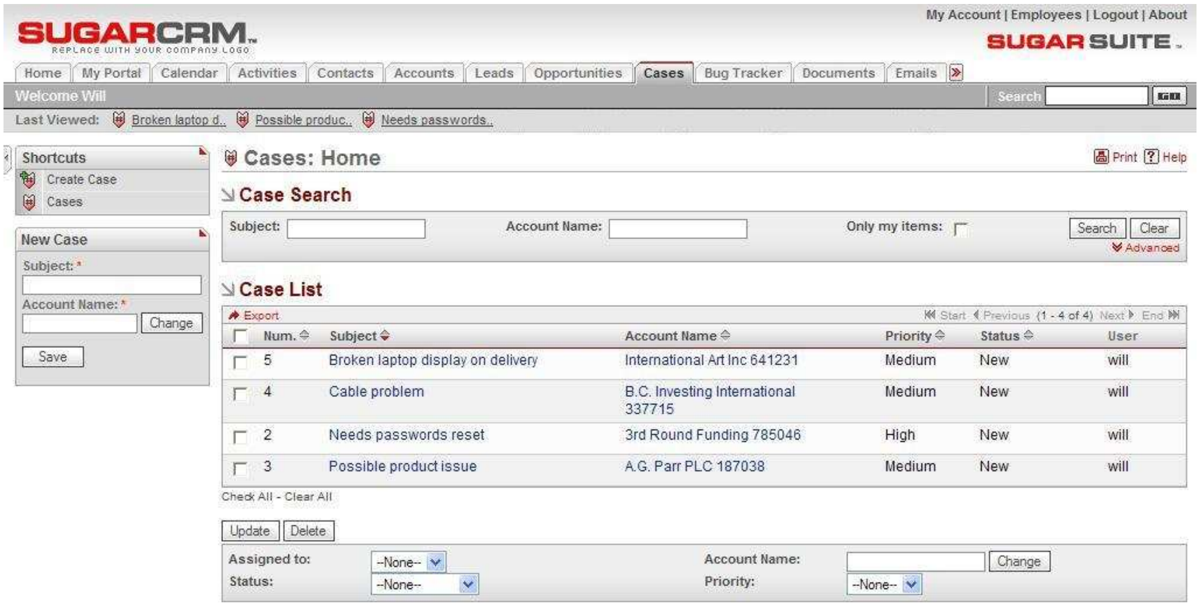

Figure 14: The Cases Module

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

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

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

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

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

4.9 The Bug Tracker Module

Figure 15 shows the Sugar Open Source screen with the Bug Tracker module selected using the Bug Tracker navigation tab:

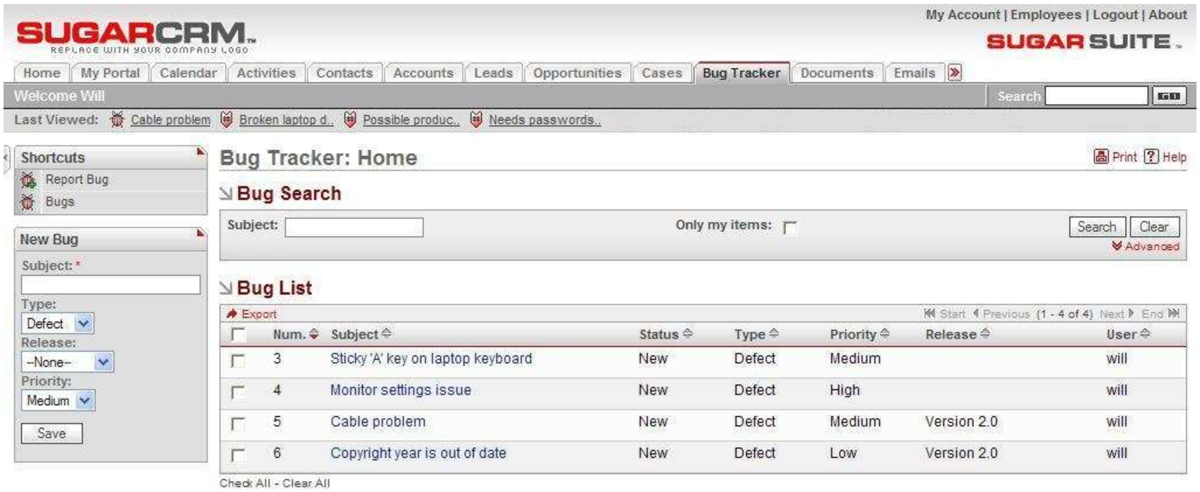

Figure 15: The Bug Tracker Module

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

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

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

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

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

4.10 The Documents Module

Figure 16 shows the Sugar Open Source screen with the Documents module selected using the Documents tab:

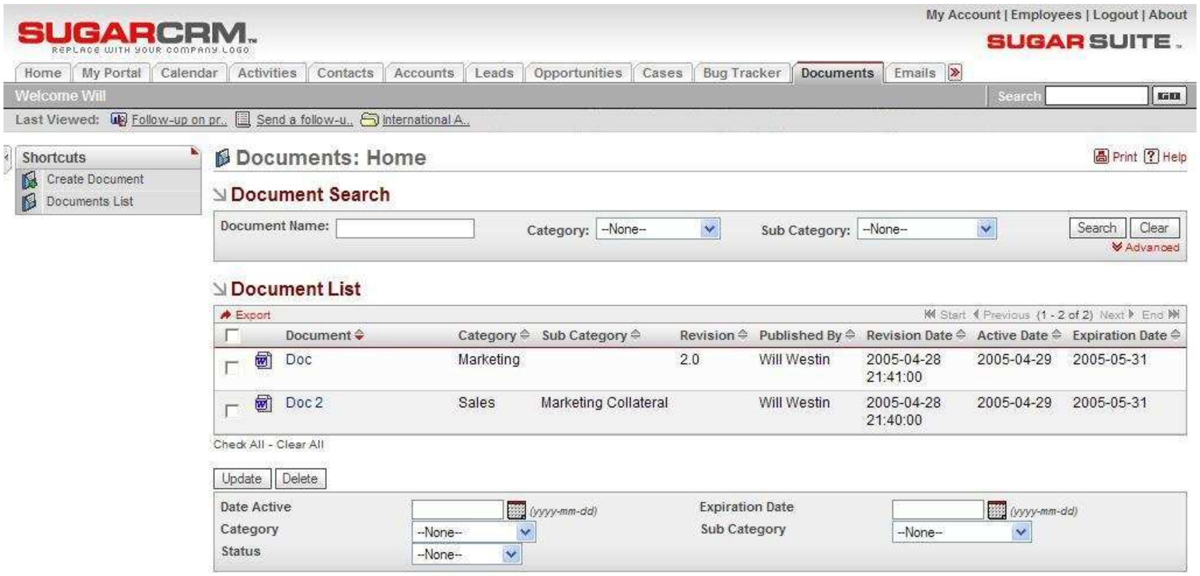

Figure 16: The Documents Module

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

To create a document, click the Create Document shortcut. Browse to the file you want to attach. You can type a different name for the document or use the file name provided. Select a Category, Sub Category, Status, Publish Date and Expiration Date. You can define a revision number or version for the document. You can also type a description for the document.

After a document is published, other users can download it and view it. To view a document in the Documents List, click the document name and then select the file name next to Download File. You can choose to either save or open the downloaded file.

When documents change, you can attach a new revision of the file by the editing the document. Select the document from the Document List and click Create in the Document Revisions section. Select the changed file using the same name or a new file to replace the original file. Specify a revision number and click Save. You cannot change the Document name displayed in the Document List when you are adding a revision. The revised file is displayed in the Document List with the new revision number.

4.11 The Emails Module

Figure 17 shows the Sugar Open Source screen with the Documents module selected using the Documents tab:

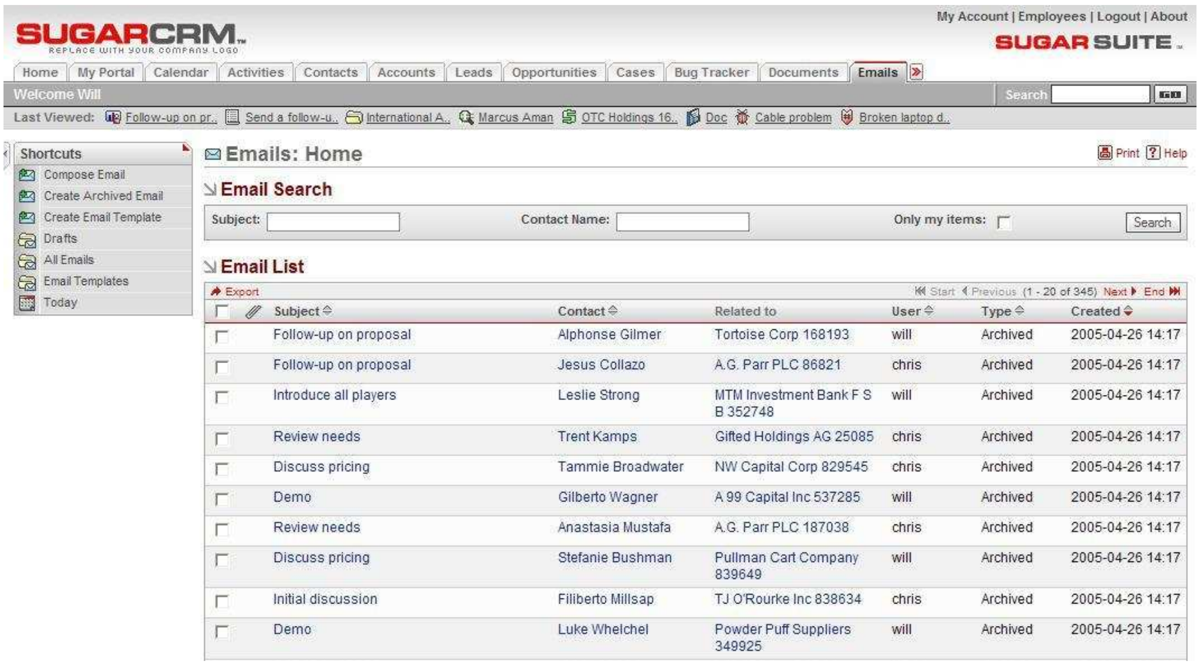

Figure 17: The Emails Module

The Emails module provides a list of all or selected Emails from a recent search. Each Email in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more values for all selected Emails. The Emails list may be sorted by clicking on any column title which has the ≑ icon beside it. Clicking on a column title when it is already the highlighted sort column reverses the sort order. The Emails list is paginated if it contains more items than may be listed on the display, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the subject for any Email in the list displays the detail information for that Email. The navigation shortcuts provided help you to create a new Email, or switch back to the Email list view and also to create or view Email Templates or view Archived Emails.

You can create Emails and send them if the Email Options in My Account are set correctly. An administrator must provide this information for your particular environment. When you send emails, you can attach a file to the email. This file becomes saved as a Note related to your email. You can also start emails and then click the Save As Draft button and send it later. Click the Drafts shortcut to display your draft emails. When you create an Email Template, you can insert variables for information such as First Name, Last Name, address or email. Then, the saved template can be applied when creating an email for individuals or in an emailing Campaign. The variables can be filled by data from the Prospect records when the email is sent. Refer to the Campaigns Module for more information on creating an emailing Campaign for large groups of leads or contacts.

You can format the body text in emails and email templates using the text formatting toolbar. Highlight the text and click buttons on the toolbar to apply standard formatting options such as font face, size, bold, italics, indentation and color. Additional buttons insert rules, hyperlinks, pictures, table and display the HTML source code. You can also click Edit Alt Text to specify the text that displays when an email client cannot render HTML code.

4.12 The Campaigns Module

Figure 18 shows the Sugar Open Source screen with the Documents module selected using the Documents navigation tab:

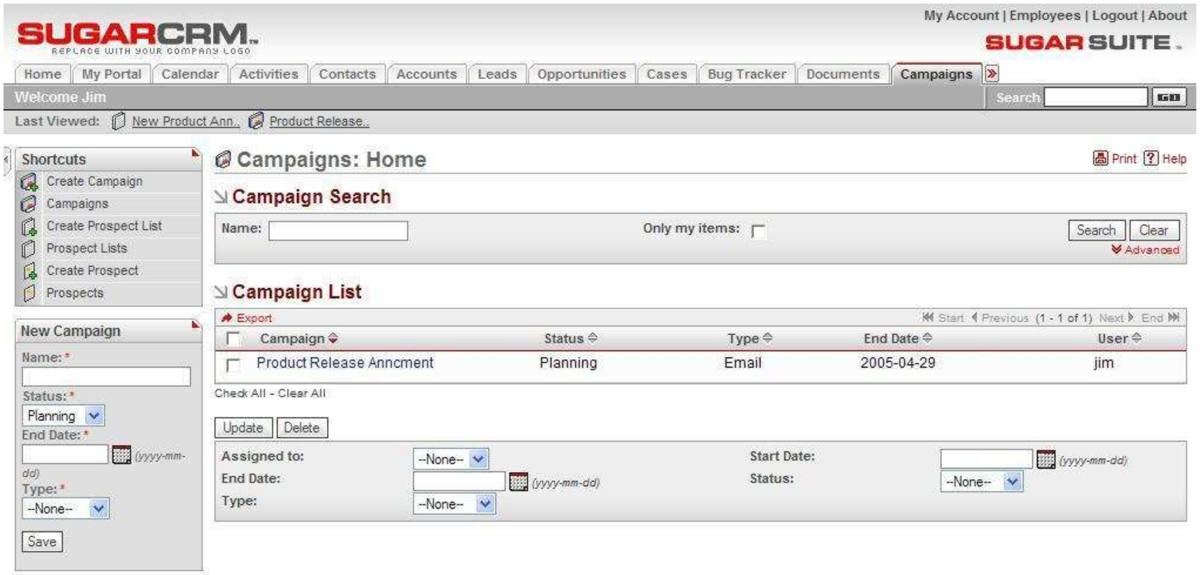

Figure 18: The Campaigns Module

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

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

For email campaigns, you can also specify settings for a Tracker Redirect URL which contains a hyperlink in the email that goes to a Web page and Tracker Link Text which is the displayed text for the hyperlink. After the emails have been sent, the Tracker Count displays how many times the Redirect URL has been clicked by readers of the emails.

The Campaigns module provides a list of all or selected campaigns from a recent search. Each campaign in the list has a check box at the left, and at the bottom of the screen is a facility to update one or more field values for all selected campaigns. For example, you might want to change the end date for several campaigns at one time. Clicking on a campaign displays details about the campaign. Click the View Change Log link to view the old and new values for fields that track changes. The tracked fields include Assigned User, Team, Start Date, End Date, Status and Type.

4.12.1 Creating an Email Campaign

Overview

1. Confirm with your system administrator that the outbound email process is configured to send email from your system as outlined in sections “5.2.1 System: Configure System Settings” and “5.2.20 Mass Emailing: Setting Up EmailMan.”
2. Create an email template.
3. Create a campaign.
4. Create an email marketing record associated to the campaign.
5. Create or select an associated prospect list
   - If the prospect list has no associated prospects, create or add prospects to the prospect list.
6. The email campaign will now send the next time your scheduled EmailMan process executes. For testing purposes, you can force the EmailMan process to execute by hitting the URL:

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

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

4.12.1.1 Creating a Prospect

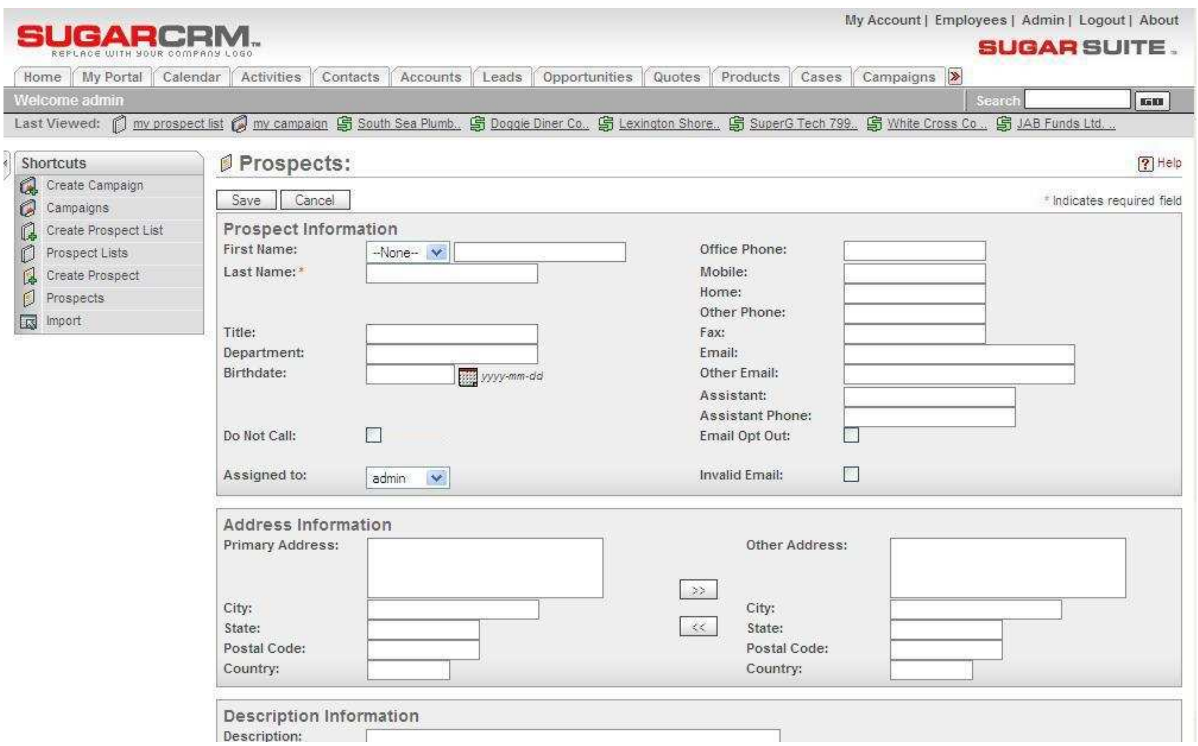

Figure 19: Creating a Prospect

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

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

4.12.1.2 Creating a Prospect List

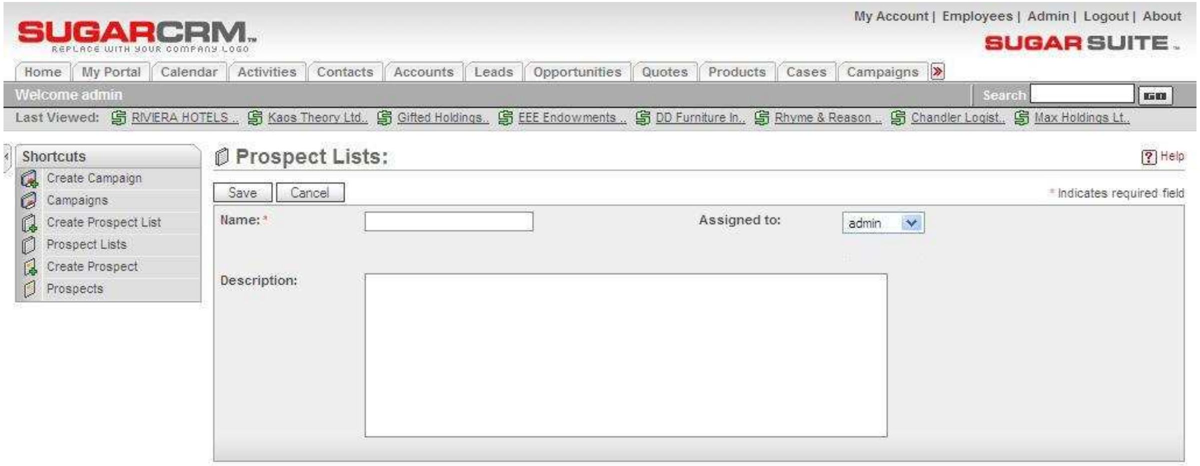

Figure 20: Creating a Prospect List

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

4.12.1.3 Creating an Email Template

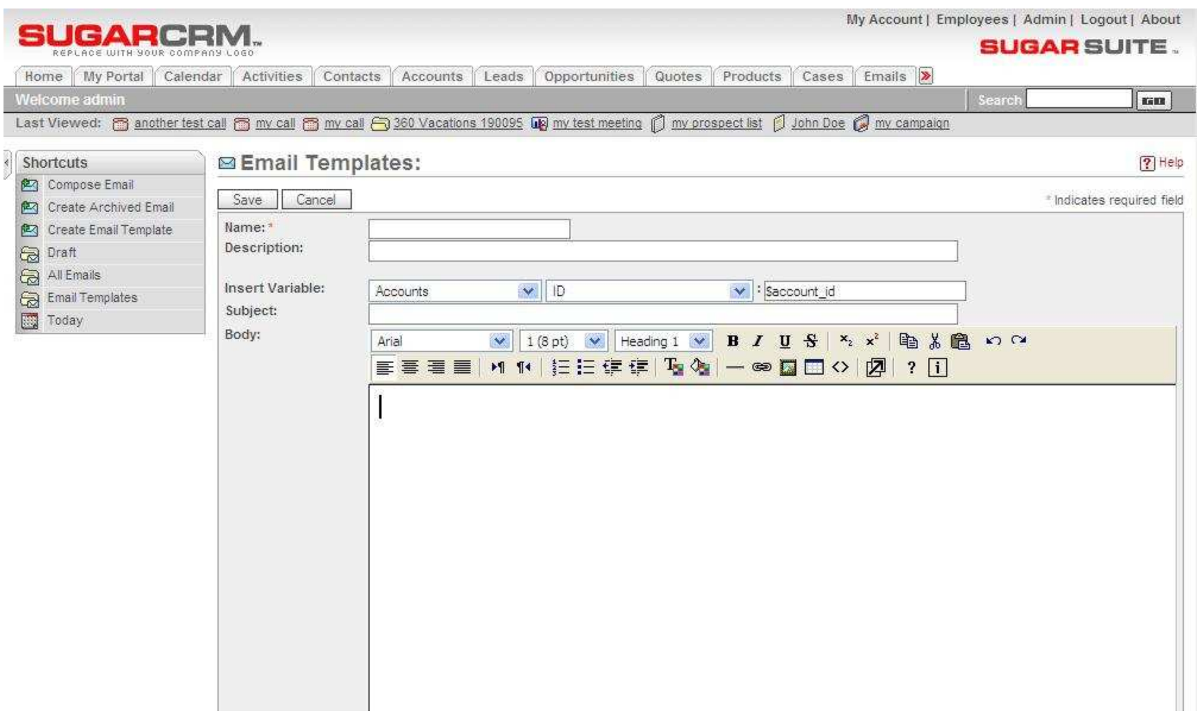

Figure 21: Creating an Email Template

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

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

4.12.1.4 Creating a Campaign

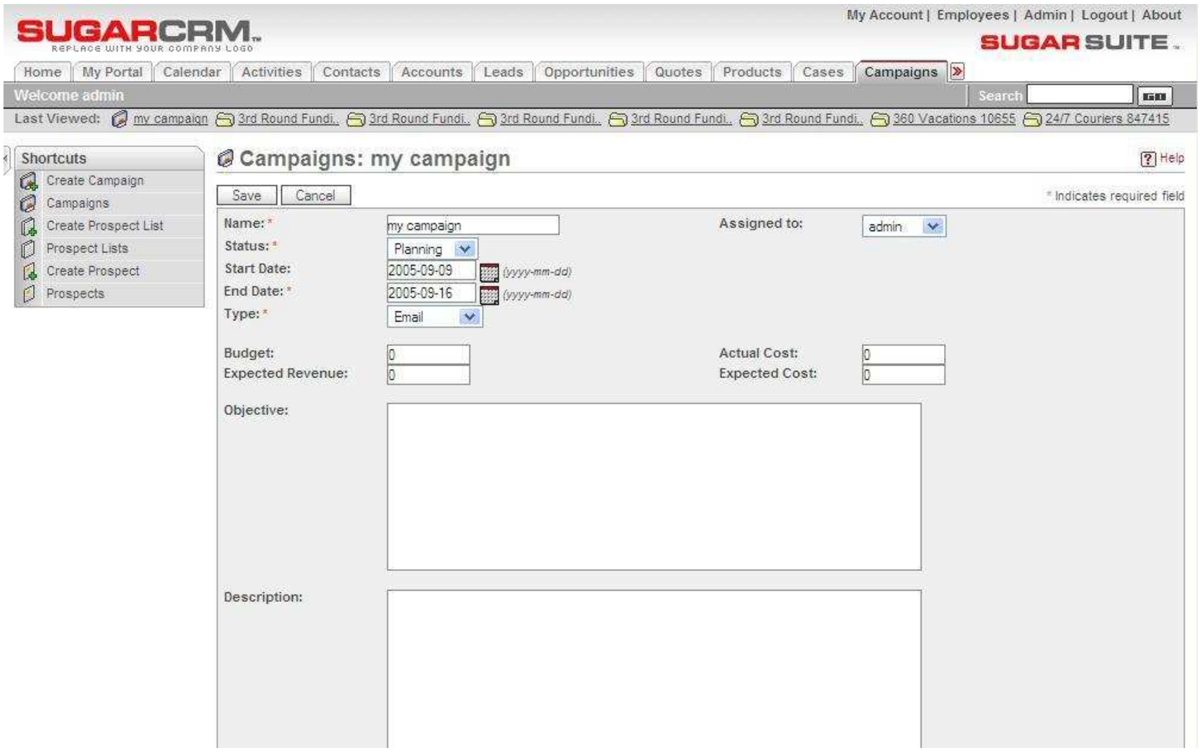

Figure 22: Creating a Campaign

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

In an email marketing campaign, the Tracker URL will be appended to the end of every outbound email message inside of Tracker Link Text. When a recipient receives the email and clicks on the Tracker Link Text, that person's browser will first visit the Tracker URL in order to track the click-through and then will be redirected to the Tracker Redirect URL.

4.12.1.5 Creating an Email Marketing Record

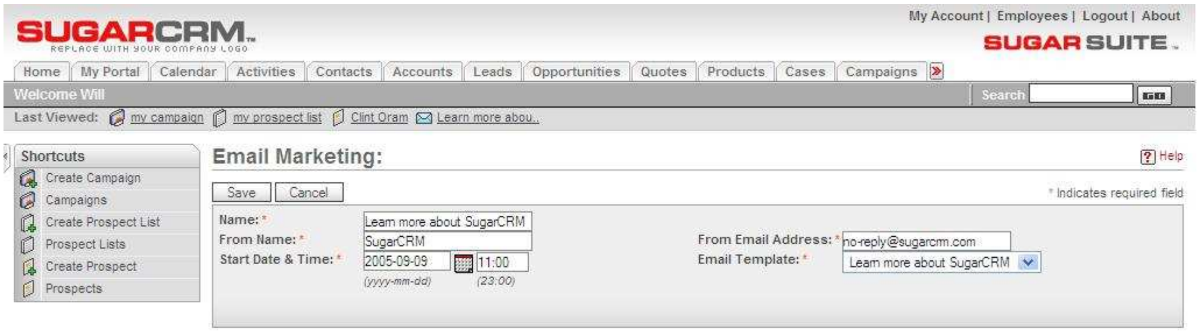

Figure 23: Creating an Email Marketing Record

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

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

4.12.1.6 View Queued Outbound Marketing Campaign Emails

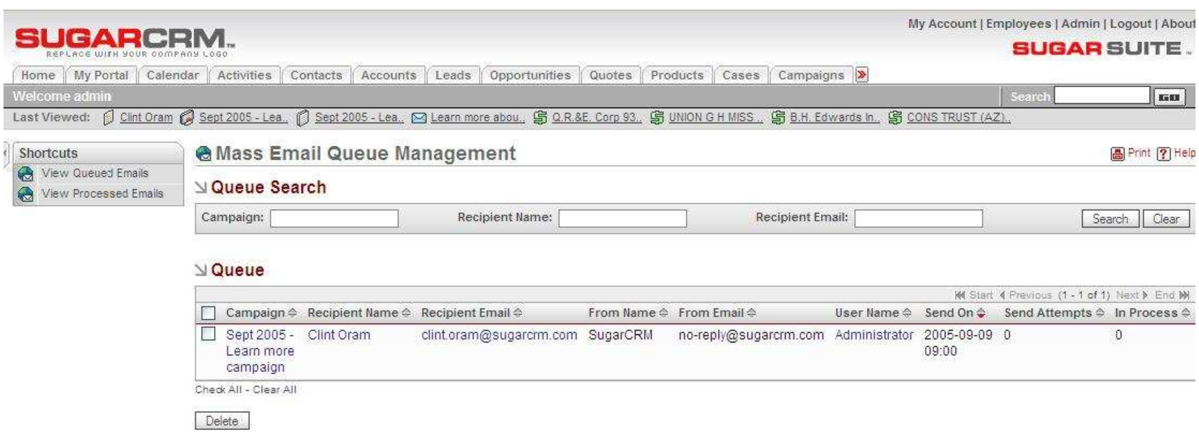

Figure 24: Viewing Queued Emails

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

4.12.1.7 View Processed Outbound Marketing Campaign Emails

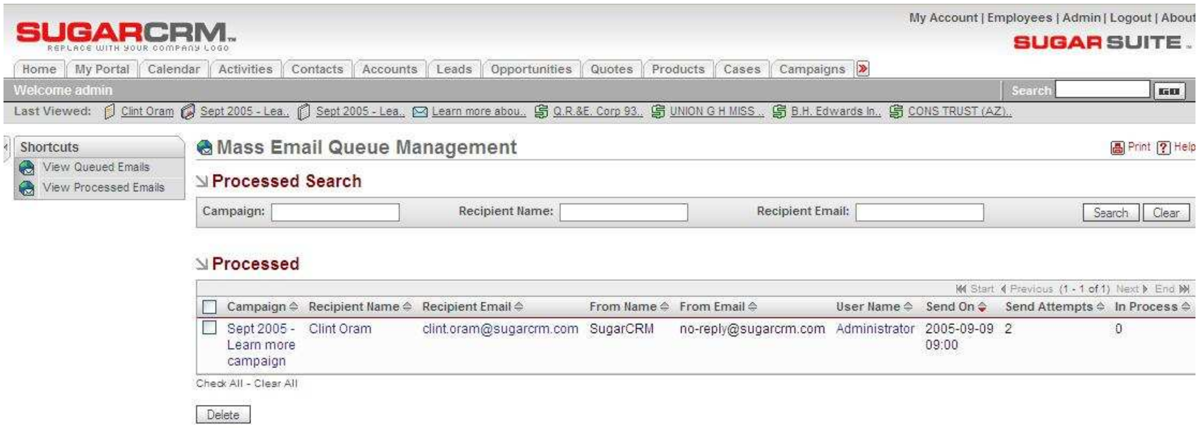

Figure 25: Viewing Processed Emails

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

4.13 The Projects Module

Figure 19 shows the Sugar Open Source screen with the Projects module selected using the Projects navigation tab:

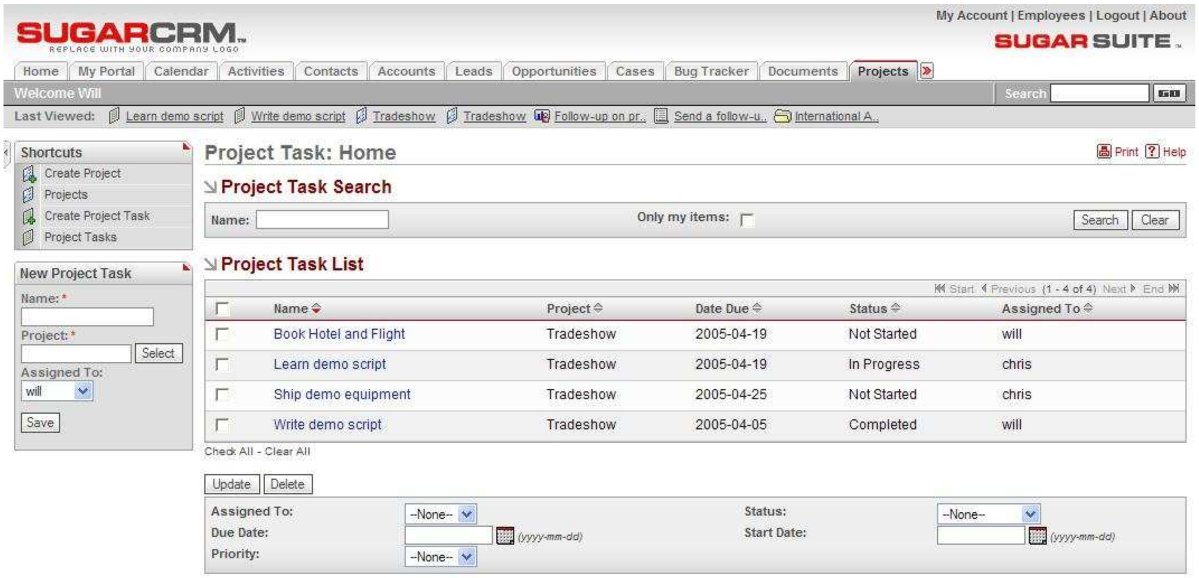

Figure 26: The Projects Module

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

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

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

The Projects list is paginated if it contains more items than may be listed on the screen, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the subject for any Project in the list displays the detail information for that Project. In the History sub-panel, click the Summary button to view history information at a glance instead of selecting each item to view. For Project Tasks, click the View Change Log link to view the old and new values for fields that track changes. The tracked fields include Assigned User, Team, Status, Due Date, Start Date, and Percent Complete.

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

You can indicate a Project Task dependency by choosing a Project Task in the Depends On field. The Utilization field indicates how much time a user is supposed to dedicate their work hours towards the assigned task. Only one person can be assigned to a given Project Task. The Progress field is available for the user to update to indicate how far along a Project Task is. The Task Number can be used to uniquely identify a task by number and can be used instead of referring to a task by Name. The Order field can be used to indicate what sequence a list of project Tasks should be performed in which is useful for Project Tasks that do not have tasks with dependencies assigned to them. All Project Tasks must be assigned to a Project. However, a Project may be associated to one or more Contact, Account, or Opportunity. Project Tasks under the Project tab are separate from Tasks under the Activities tab. The Milestone flag can be used to signify that a Project Task is significant as some sort of milestone along the Project lifetime.

4.14 The RSS Module

Figure 20 shows the Sugar Open Source screen with the RSS module selected using the RSS navigation tab:

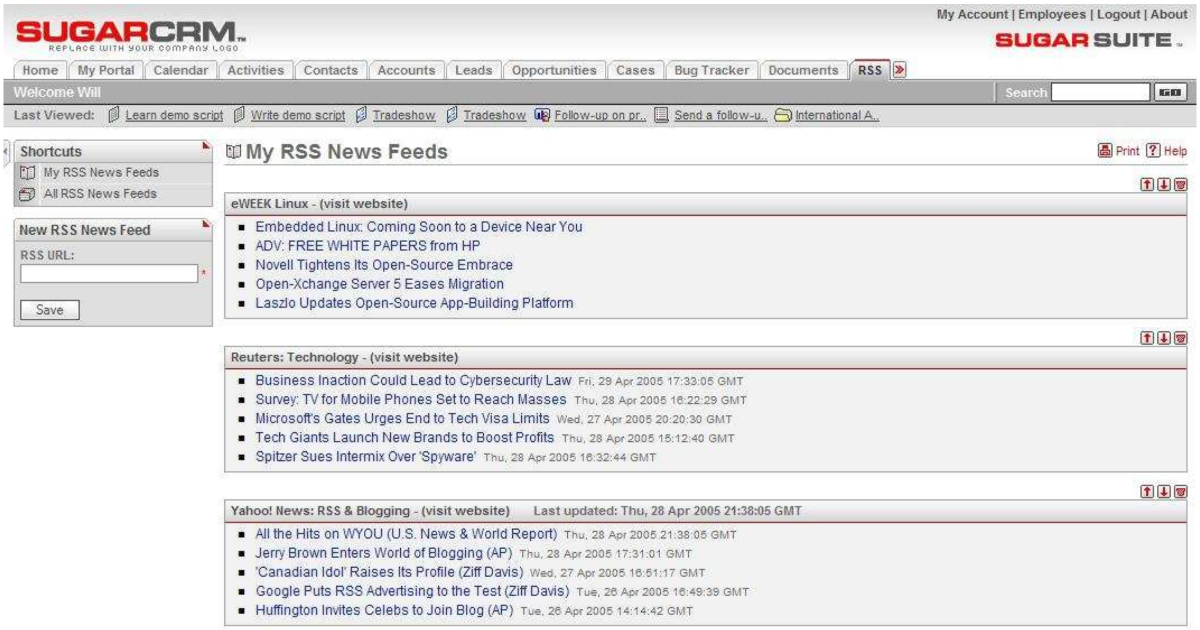

Figure 27: The RSS Module

The RSS module manages RDF Site Summary (RSS) feeds. These feeds provide news or other web content that is syndicated by web sites which publish their content in this manner. Sugar Open Source has hundreds of RSS feeds available as it is supplied, and others may easily be added via the New RSS Feed data entry box to create your own custom news-gathering experience. Clicking on the RSS Tab opens the *My RSS News Feeds* screen, as shown in the figure above. This screen is assembled from all the feeds you have marked as your favorites, and shows the latest information being provided by those feeds. The shortcuts provided let you display the *All RSS News Feeds* screen, or return to the *My RSS News Feeds* screen.

Each feed on the *My RRS News Feeds* screen has , , and controls to the right side of their header bar, to promote (move higher within the list), demote (move lower in the list), or remove that feed from your list of favorites. Within the header bar for each feed, you can also click on the name of the feed to see a full list of the items of information available from that feed, or on the word *Website* to go to the website associated with that feed. Each item of information listed for a feed has a brief title for the item which is linked to the full story or content, and the time and date when that item was added to the feed. Simply click on an item to see the full content in a new browser window.

On the *All RSS News Feeds* screen, a list of all or selected RSS News Feeds from a recent search displays. The RSS News Feeds list is paginated if it contains more items than may be listed on the display and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on the Title for any RSS News Feed in the list displays the full set of information currently available from that feed. Each RSS News Feed also has a control to add or remove it from your list of favorites.

4.15 The Dashboard Module

Figure 21 shows the Sugar Open Source screen with the Dashboard module selected using the Dashboard navigation tab:

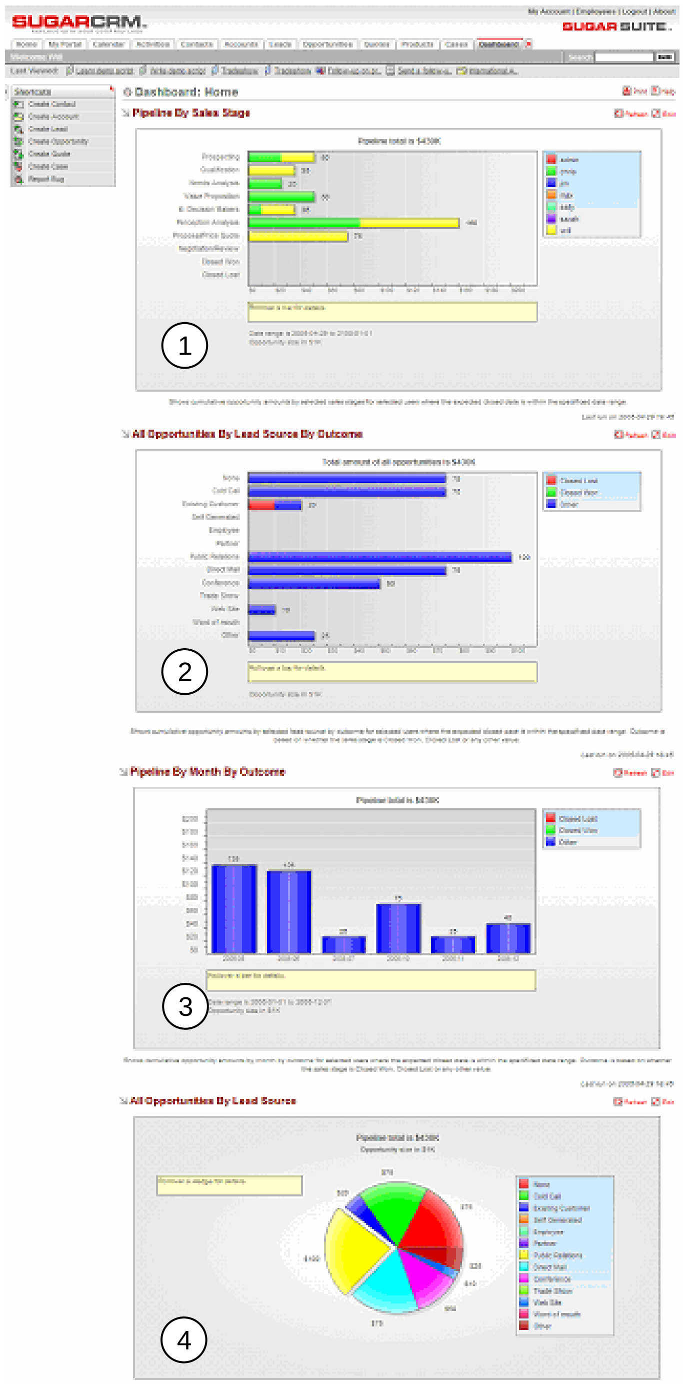

Figure 28: The Dashboard Module

There are four charts on the Dashboard display. Highlighted item 1 is a horizontal stacked bar chart of Pipeline by Sales Stage. Each bar shows the value of potential sales at each stage of the sales pipeline. Highlighted item 2 is a horizontal stacked bar chart of Opportunities by Lead Source by Outcome. It shows a stacked bar of the total opportunities for each lead source. Each bar is made up of multi-colored segments which represent the outcome proportions for that lead source. Highlighted item 3 is a stacked bar chart of Pipeline by Month by Outcome. Each bar shows the total sales pipeline for each month. Each bar is made up of multi-colored segments which represent the outcome proportions for the pipeline in that month. Highlighted item 4 is a pie chart of Opportunities by Lead Source. This shows a simple pie visualization of the proportion of total sales opportunities for each lead source.

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

- The date range or year for data to be charted;
- The user or users for whom data should be charted;
- The Sales Stages to be charted; and
- The Lead Sources to be charted.

The dialog box for each chart may be closed by clicking on the Edit button again, or you may alter parameters and then click on the Select button to produce a chart from different data. You may right click on each chart to set its display quality, to zoom the image, or to print it (charts are produced using Flash technology). To copy a chart for inclusion in a document (as in the figure below) you must take a screen copy (such as by using Alt-Print Screen in Windows) and then crop the captured image in an image editor such as Photoshop.

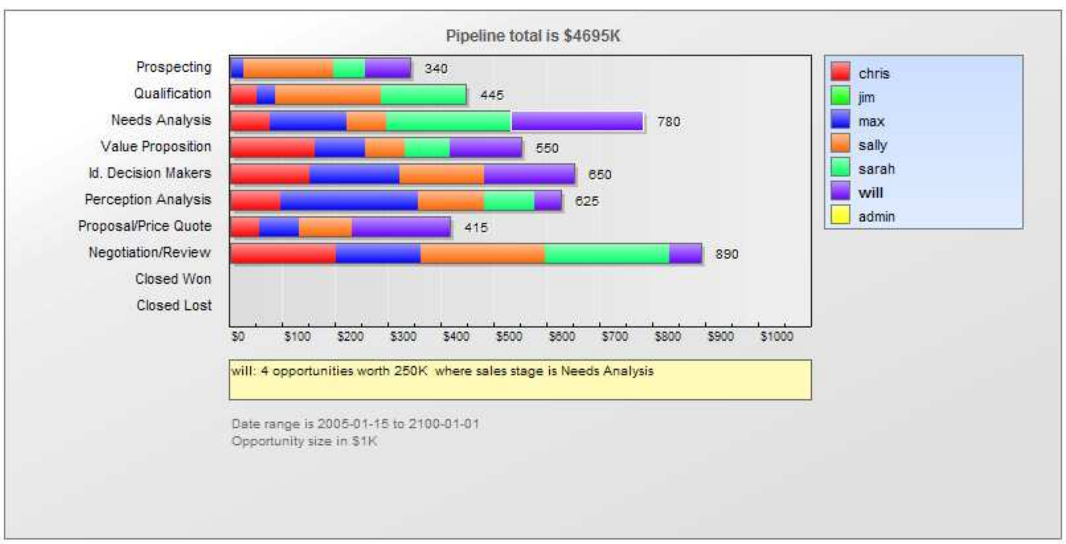

Figure 29: The 'Sales Pipeline by Sales Stage' Chart

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

5.0 User Profiles and System Admin

5.1 My Account

To access your own user profile screen, click the My Account link *(see highlighted item 1, on Figure 23 below)* that appears at the top right of your screen whenever you are logged in to the system. Note that an Admin link next to it is only displayed for users with Administrator capability. The figure below shows the user profile screen. When Administrators view information on a user, a Duplicate button displays, which allows an administrator to duplicate an account record, and then edit it briefly, as a quick way of creating a new user.

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

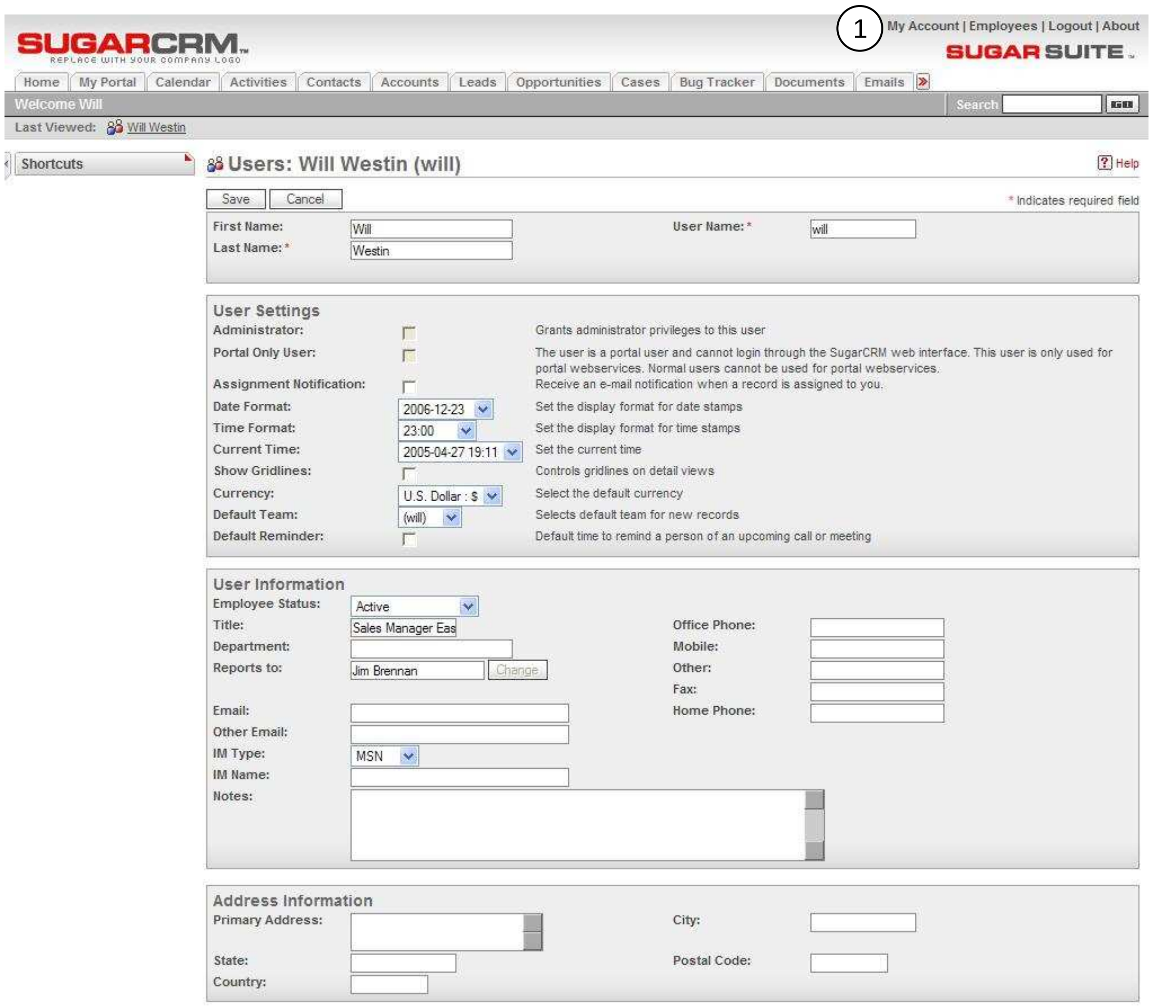

Figure 30: The 'My Account' Screen

To edit the user profile, and change user preferences, click on the Edit button. This displays a screen which lets you define header information (such as First and Last Name, and User Name), User Settings, User Information (email address, title, department, and phone numbers), Address

Information, Calendar Options, Email Options, and Edit Tabs. These groups of information are known collectively as the user profile.

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

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

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

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

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

5.2 Employees Directory

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

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

The Employees list is paginated if it contains more items than may be listed on the screen, and controls are provided to go to the start or end of the list, or step to the next or previous page. Clicking on any Employee in the list displays the detail information for that Employee.

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

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

5.3 System Administration

This section is intended for Administrators of Sugar Open Source. Administrators access an additional System Administration screen by clicking on the Admin link *(see highlighted item 1, on figure below)*. Note that the Admin link is only displayed for Administrator users. This section describes the main areas and their settings in System Administration screen:

- System
- Studio
- Bug Tracker
- Mass Email Manager

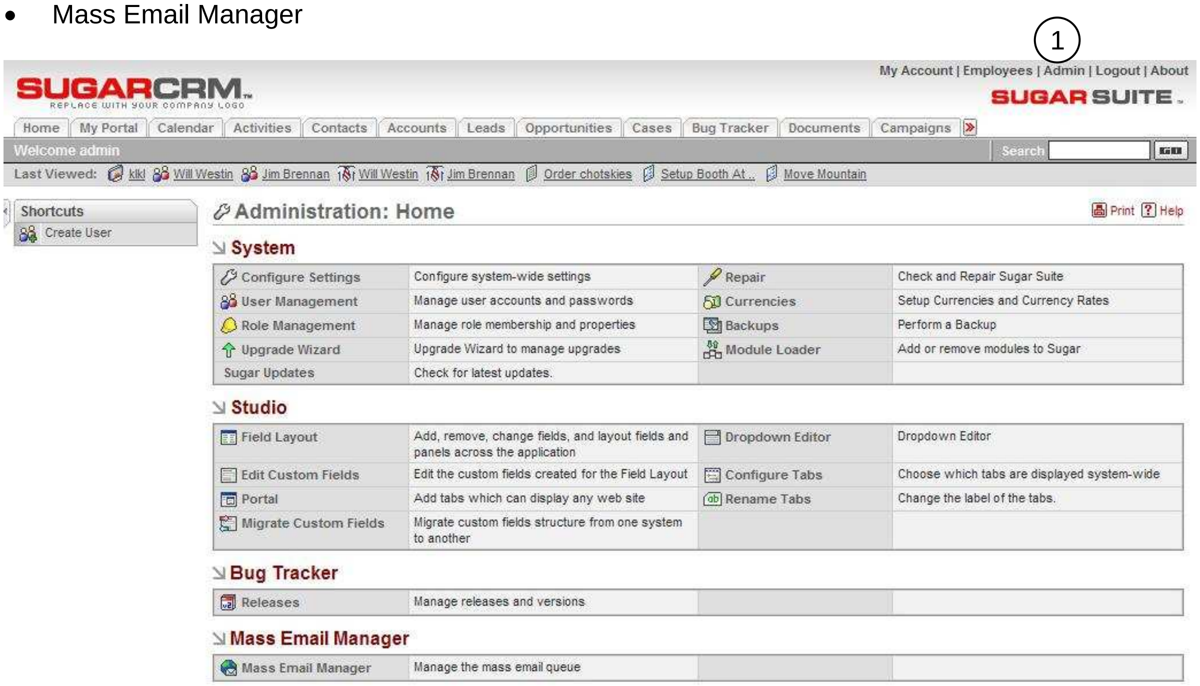

Figure 31: System Administration Module

5.2.1 System: Configure System Settings

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

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

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

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

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

5.2.2 System: User Management

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

On this screen, an Administrator can search for a user, or click on a user name to select their profile to edit. Once a user profile has been selected, the Administrator may change the password, edit the profile, or duplicate the profile, using the methods described in the *My Account* section. Note that users must have a valid email address to receive email notifications.

5.2.4 System: Role Management

You can define Roles for groups of users to specify which modules the users have access to. An example use for Role is to create different module sets for Roles named Sales, Marketing, and Support. While the users assigned to the Support Role need access to the Bug Tracker module, the users in the Sales Roles do not. To create a Role, click the Create Role shortcut, type and name and select the modules to include for the Role and then save the Role.

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

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

5.2.5 System: Upgrade Wizard

The Upgrade Wizard provides a quick way to upload and install upgrades to new versions, patches to existing versions, new language packs, and custom themes. These files are provided as .zip files. Before using the Upgrade Wizard, the config.php file for your installation must be writable.
As administrator, you browse to select the .zip file for the upgrade and click Upload. Uploading the file queues the upgrade files for installation although no installation has yet occurred. Then, click Install to install the upgrade files. A list of files displays with checkboxes that you can deselect if you do not want specific files. Click Commit to complete the installation. The Upgrade Wizard automatically unzips and installs the files.
A history of all upgrades that have been queued and installed displays in the list. You can uninstall language packs and themes using the Upgrade Wizard. Select the item to uninstall and click Uninstall. You cannot uninstall upgrades to new versions and patches.

5.2.6 System: Sugar Updates

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

5.2.7 System: Repair

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

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

- *Verify Amounts*: Clicking on this button verifies that the values in the currency fields are valid (numeric only), and do not have any currency characters such as US, CDN, in the value portion of the field. Checking *Include Closed Records* will also verify the currency fields of all closed records.
- *Fix Amounts*: Attempts to fix any invalid amounts as detected above by creating a valid decimal value from the current amount. This procedure will backup any amounts it modifies into a database field called amount_backup. **Warning**: If you perform this function and notice errors, do not perform it again without first restoring from the backup (via *Restore Amounts*, below) as it will most likely overwrite the backup with new invalid data. Checking *Include Closed Records* will also fix the currency fields of all closed records.
- *Merge Currencies*: Merges multiple currencies into a single currency. If you notice that there are multiple currency records for the same currency, you may choose to merge them together. This will also merge the currencies for all other modules. For example, “US” and “U.S.” would be merged to a single currency;.
- *Update US Dollar Amounts*: Updates the U.S. Dollar amounts for Opportunities based on the current currency rates. This value is used to calculate Graphs and List View currency amounts. This will apply the exchange rates stored in the Sugar Open Source system and modify all the US currency field values based upon the current rates. Checking *Include Closed Records* will also update the US dollar amounts of all closed records.
- Restore Amounts: This will undo the *Fix Amounts* processing, by restoring the original value from the backup field.

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

5.2.8 System: Currencies

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

5.2.9 System: Backups

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

5.2.10 System: Module Loader

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

5.2.11 Studio: Field Layout

The Layout Editor lets you rearrange the fields and panels on the screens available within Sugar Open Source, to customize them to fit your needs.

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

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

- **Select File**: Sends you to the screen first seen when entering the field layout function, to select a file to edit. If you select this shortcut when you are in the middle of editing a screen, edits on that screen are lost if not already saved.
- **Edit Fields**: Within the Layout Editor, *Edit Fields* is a mode that let's you drag and rearrange individual fields or their labels within the details panel. Select the item handle (the little square grey box) next to the field or label you want to move, and then click on the item handle where you want the field or label located. This moves the item from its previous location to its new location. If there was already a field or label at the destination the two items swap positions. *Edit Fields* also lets you move sub-panels. Moving sub-panels is the same as moving fields; select the source sub-panel handle and then click on the destination sub-panel handle, and the two switch locations.
- **Edit Rows**: Within the Layout Editor, *Edit Rows* is a mode that allows the addition and removal of rows in the details panel. Pressing the adds a row below the one currently selected, and pressing the removes the row currently selected. This feature is named *Edit Columns* in List views.
- **Edit Labels**: Clicking *Edit Labels* displays all the fields used on the page and their labels in the Toolbox in the shortcuts area. The labels are displayed in edit boxes so that you can edit one or more labels at once and then click Save. You can also click on a specific label in the page to view and edit a single label in the Toolbox and then click Save.

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

- **Display HTML Code**: To test this feature, select this checkbox and then move your cursor around the screen being edited. As the cursor passes over each field or label in the screen you can see the html that comprises it displayed as 'Alt' text in a floating box below the cursor. **Note:** While this function can be informative it is very CPU intensive, and should only be used when absolutely necessary.
- **Add Field**: Opens a dialog box which lets you specify the type of field you want to add and its name label. Click on the *Add* button to put your new field and its label in the Toolbox workspace, and close the dialog box. Next, to move your new field from the Toolbox to the screen, select its item handle and then click on the item handle where you want the field located.
- **Edit Fields**: Displays the Edit Custom Fields functionality for creating new fields. Click Save Layout to save your changes before clicking this item. Changes are not saved when you click this item because you are leaving the page.
- **Staging Area**: Drag items to the Staging Area while you are working with them.
- **Sugar Fields**: Lists the fields that are not used in the page. Selecting a field adds it to the Staging Area. You may only drag items out of this area.
- **Sugar Bin**: You can add items from the Sugar Bin to the Staging Area. Items that you left in the Staging Area when you click Save Layout appear in the Sugar Bin the next time you edit this page. You may only drag items out of this area.

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

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

5.2.12 Studio: Edit Custom Fields

You can add custom fields to any module in Sugar Open Source. First, select the module in which you want to add or edit custom fields. Then you can define the field using Field Name, Field Label (the label displayed on the module), Data Type, Max Size, Required Field (indicated by asterisks for users), and Default Value. After saving a new field, you can view and edit information about the field in the Custom Fields list for the module. In Field Layout, you can place the custom field on the module page by dragging it to the new location, just like any other field.

5.2.13 Studio: Portal

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

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

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

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

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

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

5.2.14 Studio: Migrate Custom Fields

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

5.2.15 Studio: Dropdown Editor

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

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

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

5.2.16 Studio: Configure Tabs

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

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

5.2.17 Rename Tabs

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

5.2.18 Bug Tracker: Releases

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

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

5.2.19 Mass Email Manager

You can manage mass email campaigns that have been created in the Campaigns module. Other users may create email campaigns containing a template email to large numbers of prospects. Depending on the send date the user assigns to the emails, the emails then wait in the email queue to be sent on the particular date. As administrator, you can monitor these emails as they are sent. You can also delete emails that are waiting to be sent. You can view information on each email such as Campaign, Recipient Name, Recipient Email, From Name, From Address, User Name who created the email, Send On date, Send Attempts, and In Progress status. The Mass Emailing Queue Manager only displays emails created through email campaigns and does not include emails created using the Email module.

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

5.2.20 Mass Emailing: Setting Up EmailMan

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

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

To use EmailMan, you must first correctly configure the email settings outlined in Section 5.2.1 above. EmailMan uses the same email server connection settings. Notifications do not necessarily have to be turned on, but the settings must be properly configured for recipients to properly receive emails.

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

Setting Up the Mass Emailing Cron Job on UNIX

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

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

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

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

/man 5 crontab/

Setting Up the Scheduler on Microsoft Windows

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

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

5.2.21 Calendar Information: Sharing Free/Busy Information with Outlook

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

In Microsoft Outlook, select Tools > Options. Then click the Calendar Options button and then click Free/Busy. Select the Publish at my location checkbox and enter the path for the Sugar email account information following the syntax:

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

where ‘myemail@servername’ is the email address specified for Email Options in the user’s My Account page in Sugar Open Source. On the My Accounts page in the Calendar Options, the URL for publishing free/busy information is displayed in Your Publish URL.

For Search location, enter the path for the Outlook account information, such as:

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

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

6.0 Information Import and Export

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

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

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

6.1 Importing Accounts and Contacts

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

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

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

Exporting Contacts from Your Current Contact Manager

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

1. Under the File menu, select Import and Export. The Import and Export Wizard dialog box is then displayed.
2. Select the action *Export to a file*, and click the Next button.
3. Choose to create a file of the type *Comma Separated Values (Windows)*, and click on the Next button.

4. Select an Outlook folder from which to export – typically your contacts folder - and click the Next button.
5. Enter the filename and directory location for the exported file to be created, and click the Next button.
6. Confirm your intention to export this file by clicking on the Finish button.
7. The CSV file is then created by Outlook 2003. You can view the file easily, using Microsoft Excel or a simple text editor, to confirm that the data you intended has been exported.

Importing Accounts

If your Account data is coming in from another CRM system, then typically that system understands the distinction between a Contact and an Account – that one Account can have multiple Contacts – and has separate data for each. If, however, your data is being imported from a simpler contact manager – such as Microsoft Outlook, then the only data available is Contact data, and you will have to be a bit creative to avoid a lot of manual data entry as described above.

If you are importing Account data from a full CRM, proceed now to step 5. If you only have exported contact data, and need to massage it to act as Account data to be imported, perform steps 1-4 below:

1. Copy your exported Contacts.csv file, and call the copy Accounts.csv.
2. Edit the Accounts.csv file using Excel. First, sort the file on the column which contains the Company name.
3. Now the more complex part: As you scroll through your data, sorted by Company name, you will see successive records which have the same company name, because there is more than one Contact from that Account (in Sugar Open Source terminology). To avoid multiple copies of the same Account within Sugar Open Source, you need to delete these duplicates. And to make sure that the best information is attached to the Account record, you should retain only the contact whose address and telephone information best represents the Account as a whole.

   Also look out for Company names which are similar but not identical due to inconsistencies in the way the Company name was entered – you should delete all duplicate records except the one with the Company name spelt exactly how you want to see it in Sugar Open Source.
4. Now that you have a nice clean set of Account data, save the Excel file as a .CSV file type, and let's proceed to import this Account data.
5. Click on the import Accounts function within the Navigation Shortcuts Box of the Accounts module.
6. Specify the Data Source: Select Salesforce.com, ACT!, or Custom – then click on the Next button to continue. For 'massaged' Outlook files where the field names no longer match exactly what is exported from Outlook, use the Custom data source.
7. Upload the Export File: Use the Browse button to locate the Accounts CSV data file, and then click on the Next button to continue.
8. Confirm Fields and Import: This screen (see Figure 28 below) shows four columns of data. Column 2 (Header Row) is the key – this contains the names of the fields being exported from your old CRM or contact manager. Columns 3 and 4 show example data from the first two records you are about to import. Column 1 (Database Field) is where you come in – you need to use all of the drop-down box controls in this column to select the fields within Sugar Open Source into which each incoming Account field is imported.

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

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

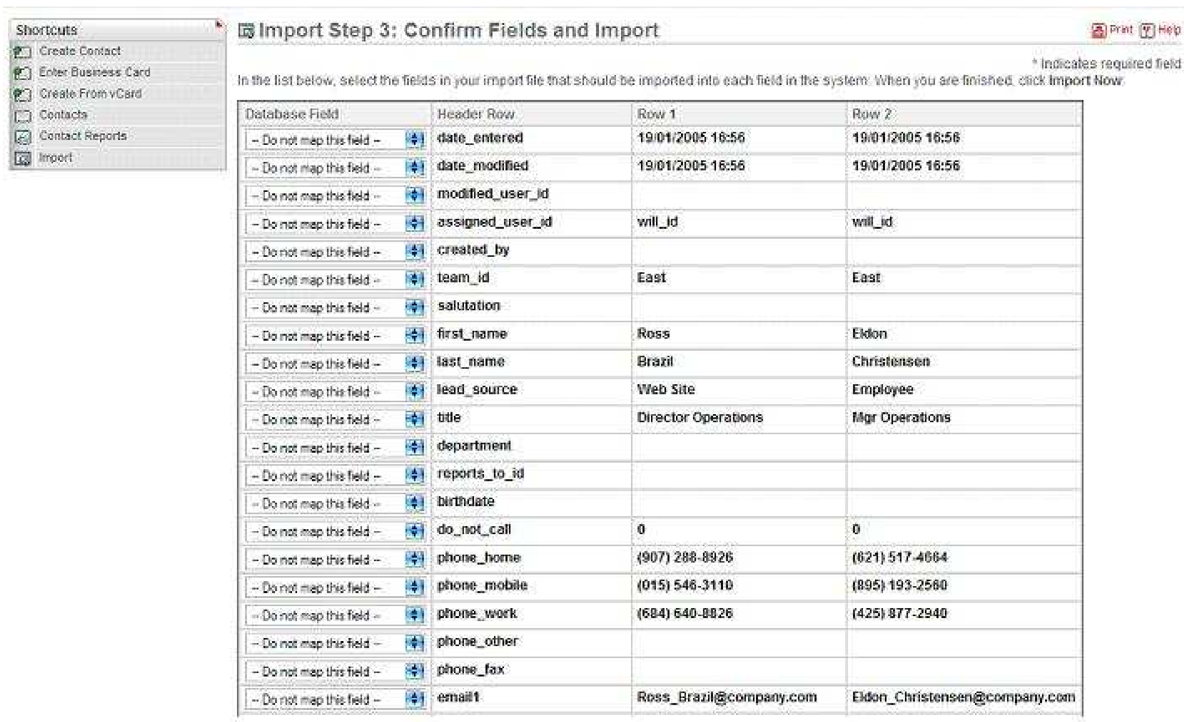

Figure 32: Confirm Fields and Import Screen

Importing Contacts

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

1. Click on the import Contacts function within the Navigation Shortcuts Box of the Contacts module.
2. Specify the Data Source: Select Salesforce.com, Microsoft Outlook, ACT!, or Custom – then click on the Next button to continue.
3. Upload the Export File: Use the Browse button to locate the data file exported by your contacts manager, and then click on the Next button to continue.
4. Confirm Fields and Import: This screen (see Figure 28 above) shows four columns of data. Column 2 (Header Row) is the key – this contains the names of the fields being exported

from your old CRM or contact manager. Columns 3 and 4 show example data from the first two records you are about to import. Column 1 (Database Field) is where you come in – you need to use all of the drop-down box controls in this column to select the fields within Sugar Open Source into which each incoming Contact field is imported.

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

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

6.2 Importing Leads and Opportunities

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

6.3 Exporting Information

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

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

A sample portion of a CSV file, exported from the Accounts module and viewed in Excel, is shown in Figure 29 below. You can see that essentially the entire database table of information is exported in the CSV file with column titles, including the Record ID (a long and largely incomprehensible string of letters and numbers used as a unique reference to each Account record) and other fields which Sugar Open Source uses internally.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	id	date_entered	date_modified	mod	as:	name	par	account_type	industry	an	pho	billing_address_street	billing_address_city	billing_address_state
2	874fd	01/12/2004 20:00	01/12/2004 20:00		1	Otc Bb		Customer	Government			9 IBM Path	St. Petersburg	CA
3	89ee(	01/12/2004 20:00	01/12/2004 20:00		1	2M Invest A/S		Customer	Not For Profit			777 West Filmore	Santa Monica	NY
4	8ba6f	01/12/2004 20:00	01/12/2004 20:00		1	A 77 Capital Inc		Customer	Education			345 Sugar Blvd.	Santa Monica	CA
5	8d5ef	01/12/2004 20:00	01/12/2004 20:00		1	Absa Group Limited		Customer	Education			999 Baker Way	Los Angeles	CA
6	8f274	01/12/2004 20:00	01/12/2004 20:00		1	Ab Watley Group Inc		Customer	Telecommunications			111 Silicon Valley Road	San Francisco	NY
7	90e15	01/12/2004 20:00	01/12/2004 20:00		1	Ag Media Group Inc		Customer	Engineering			123 Anywhere Street	Cupertino	CA
8	92c5c	01/12/2004 20:00	01/12/2004 20:00		1	Aits Inc		Customer	Manufacturing			9 IBM Path	Cupertino	CA
9	9478c	01/12/2004 20:00	01/12/2004 20:00		1	Ail Intech		Customer	Banking			123 Anywhere Street	Salt Lake City	NY
10	96266	01/12/2004 20:00	01/12/2004 20:00		1	Ami Resources Inc		Customer	Energy			345 Sugar Blvd.	Persistance	CA
11	97ed2	01/12/2004 20:00	01/12/2004 20:00		1	Ams Marketing		Customer	Shipping			48920 San Carlos	Alabama	CA
12	999e4	01/12/2004 20:00	01/12/2004 20:00		1	A Novo Broadband Inc		Customer	Chemicals			48920 San Carlos	Alabama	NY
13	9b4ac	01/12/2004 20:00	01/12/2004 20:00		1	Aoi Coal Co		Customer	Machinery			9 IBM Path	Cupertino	CA
14	9cf86	01/12/2004 20:00	01/12/2004 20:00		1	Art International Inc		Customer	Shipping			321 University Ave.	Cupertino	CA
15	9ea55	01/12/2004 20:00	01/12/2004 20:00		1	A&D Co Ltd		Customer	Media			123 Anywhere Street	Sunnyvale	NY
16	a0556	01/12/2004 20:00	01/12/2004 20:00		1	A&E Capital Funding Inc		Customer	Not For Profit			48920 San Carlos	San Mateo	CA
17	a204c	01/12/2004 20:00	01/12/2004 20:00		1	A-Com Ab		Customer	Telecommunications			67321 West Siam St.	Ohio	CA
18	a3cee	01/12/2004 20:00	01/12/2004 20:00		1	A-Fem Medical Corp		Customer	Hospitality			345 Sugar Blvd.	San Mateo	NY
19	a57f3	01/12/2004 20:00	01/12/2004 20:00		1	A-Max Holdings Ltd		Customer	Shipping			1715 Scott Dr	Santa Monica	CA
20	a73b0	01/12/2004 20:00	01/12/2004 20:00		1	A-S China Plumbing Products		Customer	Shipping			777 West Filmore	San Mateo	CA
21	a8f28	01/12/2004 20:00	01/12/2004 20:00		1	A. Schulman Inc		Customer	Utilities			111 Silicon Valley Road	San Jose	NY
22	aa9ec	01/12/2004 20:00	01/12/2004 20:00		1	A.A Importing Company Inc		Customer	Machinery			48920 San Carlos	Sunnyvale	CA
23	ac550	01/12/2004 20:00	01/12/2004 20:00		1	A.C. Moore Arts & Crafts Inc		Customer	Utilities			123 Anywhere Street	San Mateo	CA
24	ae037	01/12/2004 20:00	01/12/2004 20:00		1	A.C.L.N. Ltd		Customer	Government			321 University Ave.	Santa Fe	NY
25	afcbc	01/12/2004 20:00	01/12/2004 20:00		1	A.D.A.M. Inc		Customer	Utilities			777 West Filmore	St. Petersburg	CA
26	b177c	01/12/2004 20:00	01/12/2004 20:00		1	A.G. Barr Plc		Customer	Chemicals			345 Sugar Blvd.	Denver	CA
27	b3499	01/12/2004 20:00	01/12/2004 20:00		1	A.G. Edwards Inc		Customer				123 Anywhere Street	Ohio	NY
28	b4f8c	01/12/2004 20:00	01/12/2004 20:00		1	A.G.D. Mining Ltd		Customer	Communications			123 Anywhere Street	San Francisco	CA
29	b6ed4	01/12/2004 20:00	01/12/2004 20:00		1	A.J. Ross Logistics Inc		Customer	Food & Beverage			999 Baker Way	Los Angeles	CA
30	b89ac	01/12/2004 20:00	01/12/2004 20:00		1	A.M. Castle & Co		Customer				1715 Scott Dr	San Francisco	NY
31	ba4bc	01/12/2004 20:00	01/12/2004 20:00		1	A.O. Smith Corp		Customer	Entertainment			67321 West Siam St.	St. Petersburg	CA
32	bc173	01/12/2004 20:00	01/12/2004 20:00		1	A.O.G. Air Support Inc		Customer	Biotechnology			9 IBM Path	St. Petersburg	CA
33	bdcf5	01/12/2004 20:00	01/12/2004 20:00		1	A.T. Cross Co		Customer	Communications			123 Anywhere Street	San Mateo	NY
34	bf95e	01/12/2004 20:00	01/12/2004 20:00		1	A.T.&E. Corp		Customer	Utilities			9 IBM Path	Los Angeles	CA
35	c1599	01/12/2004 20:00	01/12/2004 20:00		1	Abitibi-Consolidated Inc		Customer	Shipping			777 West Filmore	Cupertino	CA
36	c32b1	01/12/2004 20:00	01/12/2004 20:00		1	Aes Gener S A		Customer	Apparel			345 Sugar Blvd.	San Jose	NY

Figure 33: CSV File in Excel

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Sugar Open Source User Guide

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