



SUGARCRM[™]
COMMERCIAL OPEN SOURCE

Sugar Open Source Administration Guide

Version 4.5.1

Sugar Open Source Administration Guide
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Preface

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

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

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

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

Welcome to the community!

About this Guide

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

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

Audience

The *Sugar Open Source Administration Guide* provides information for users who want to record and track company activities and outcomes. In addition, this guide

provides information for system administrators who manage user access and system configuration.

Overview

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

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

Core Features

Sales Management

- Lead, Contact and Opportunity Management to share information and pursue new business.
- Account Management to manage all customer interactions in a single location.
- Automated quote generation to present compelling product offers.

Marketing Automation

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

Collaboration

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

News Service

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

Administration

- Quickly edit user settings, views and layouts in a single location.
- Customize the application with Sugar Studio so that Sugar Suite meets the exact needs of your company.

Interface Consolidation

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

Sugar Suite is built on established open-source technologies and widely supported industry standards, including the PHP development environment, the MySQL relational database, the Apache or IIS web servers, and the Linux or Windows Server operating systems. The system supports both the LAMP (Linux, Apache, MySQL, PHP) and WIMP (Windows, IIS, MySQL, PHP) platforms.

What's New in 4.5.1

With each revision of the Sugar Suite software, significant advances are made in both the feature set and usability of the software. Some of the highlights of version 4.5.1 are detailed below.

Campaign Management

Sugar now offers the following features for campaigns:

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

Module Loader

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

Related Documentation

Refer to the following guides for related information:

- *Sugar Open Source Installation Guide*: Describes how to install Sugar Suite.
- *Sugar Open Source Administration Guide*: Describes how to set up, configure, and manage Sugar Suite.

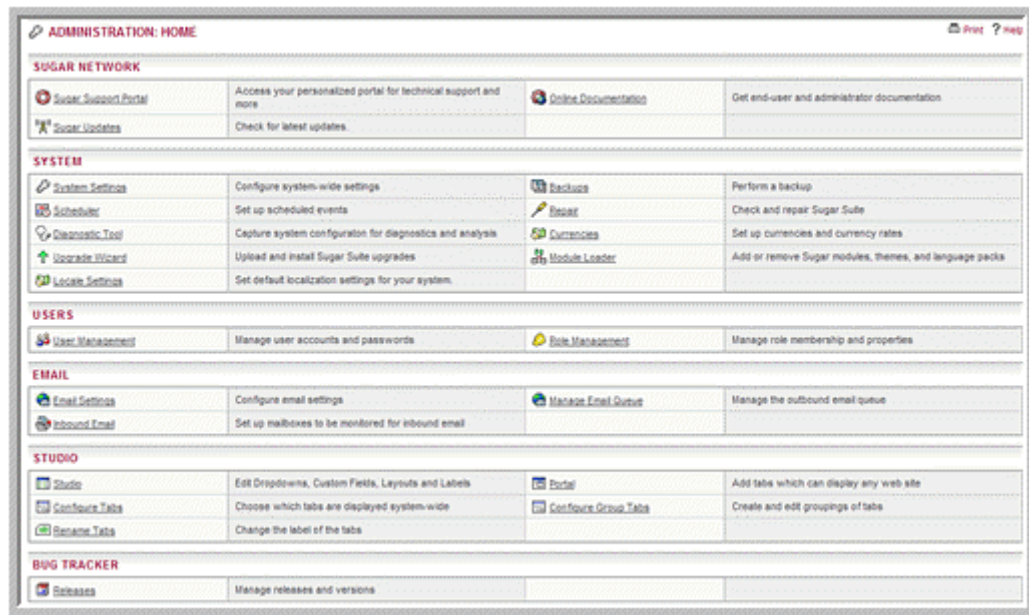
System Administration

This document describes the various tasks that Sugar Suite administrators must perform.

Topics include:

- [“Sugar Network” on page 5](#)
- [“System” on page 7](#)
- [“Users” on page 33](#)
- [“Email” on page 41](#)
- [“Studio” on page 48](#)
- [“Bug Tracker” on page 60](#)

When you log in as administrator, the Admin link displays at the top right. Click this link to view the Administration page.



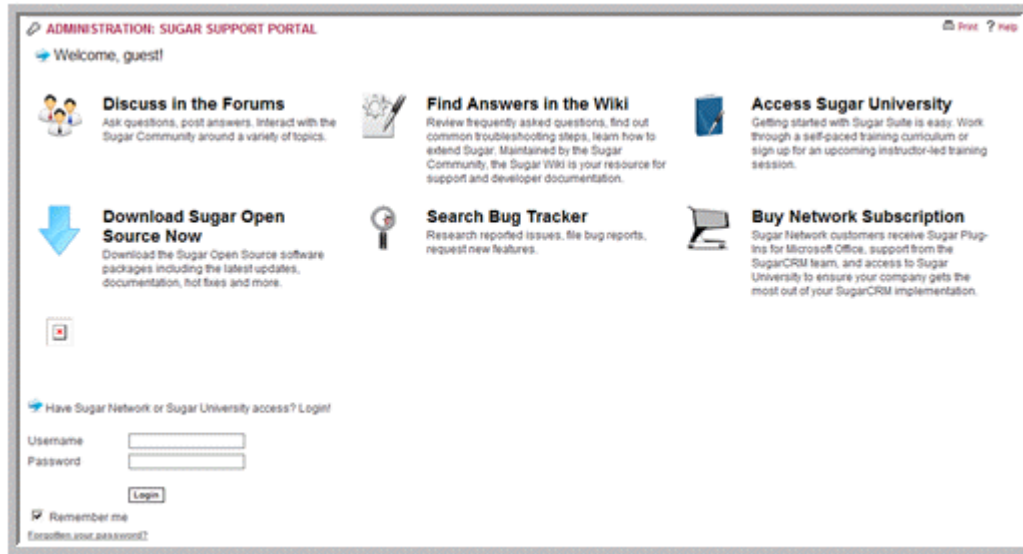
This page displays several sub-panels that group tasks according to the area of administration.

Sugar Network

This sub-panel includes options to access the Sugar Suite support, view license information, and download the latest Sugar Suite versions and documentation.

Sugar Support Portal

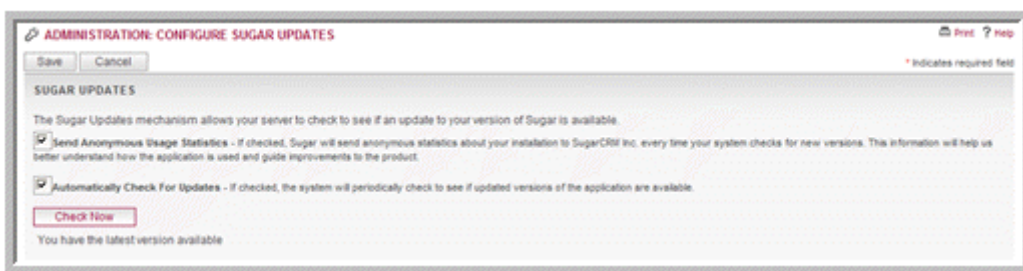
Use this option to access the SugarCRM forums, search FAQs (Frequently Asked Questions), download the latest Sugar Suite version, buy network subscription, log into the network, file bugs, research reported bugs, and request new features.



The SugarCRM forums cover discussions on a broad range of topics such as application previews, Sugar plug-ins for Microsoft Outlook and Microsoft Word, and localization. If you want to participate in the discussions, you will need to register your organization with SugarCRM, Inc. However, you can view postings on any of the forums without registering your organization.

Sugar Updates

Use this option to check automatically or manually for Sugar updates.



If you choose to check for Sugar Suite updates automatically, you will be notified when new Sugar Suite versions or updates are available.

To perform a manual check, click **Check Now**. If you already have the latest version, the message “You have the latest version available” displays at the bottom of the panel.

Online Documentation

Use this option to view and download PDF copies of available Sugar Suite documentation on installing and using the application and plug-ins.

System

The options listed under this section allow you to configure system-wide settings that apply to all users in your organization. However, users can override some default settings, such as the default date format, by specifying different settings in their My Accounts page.

System Settings

Use this option to configure the system-wide settings according to your organization's specifications. Users can override some default settings, such as the date format, on their My Accounts page


SYSTEM SETTINGS: ? Help

Save Restore Cancel


USER INTERFACE

Listview items per page:	<input type="text" value="20"/>	Subpanel items per page:	<input type="text" value="10"/>
Display server response times:	<input checked="" type="checkbox"/>	Display tabs on login screen:	<input checked="" type="checkbox"/>
Prevent user customizable Homepage layout:	<input type="checkbox"/>	Prevent user customizable subpanel layout:	<input type="checkbox"/>
Maximum number of Dashlets on Homepage:	<input type="text" value="15"/>	Show Full Name (not Login):	<input type="checkbox"/>

LOGOS

Current logo in use:  **SUGARCRM**
COMMERCIAL OPEN SOURCE
Replace with your company logo

Upload new logo (212x40):

Logo used in Quotes (85%):  **SUGARCRM** 10050 N Wolfe Rd.
COMMERCIAL OPEN SOURCE SW2-130
Cupertino, CA 95014

Upload new Quote logo (867x74):

LDAP AUTHENTICATION SUPPORT

Enable LDAP

PROXY SETTINGS

Use proxy server? [Configure proxy server address and authentication settings](#)

CUSTOMER SELF-SERVICE PORTAL

Enable self-service portal integration? Allows Case, Note and other data to be accessible by an external customer self-service portal system.

SKYPEOUT®

Enable SkypeOut® integration? Allows users to click on phone numbers to call using SkypeOut®. The numbers must be formatted properly to make use of this feature. That is, it must be "*" "The Country Code" "The Number", like +1 (555) 555-1234. For more information, see the Skype FAQ at [skype®.faq](#)

User Interface

Use this sub-panel to configure the user interface.

1. Configure the following fields:

Listview items per page. Enter the maximum number of records you want displayed in the list view. The system paginates lists that contain more than the specified number of records.

Display server response times. By default, the footer on every page displays the time taken to respond when users attempt to perform an action, such as logging in or opening an item, in Sugar Suite. Deselect this box if you do not want to display the response time.

Prevent user customizable Homepage layout. Select this box if you want to prevent users from customizing their Home page layout.

Maximum number of Dashlets on Homepage. Enter the maximum number of dashlets you want displayed on the Home page. Users will not be able to add more than the number of dashlets that you specify. The default value is 10.

Subpanel items per page. Enter the maximum number of records you want displayed in the list view. The system paginates lists that contain more than the specified number of records.

Display tabs on login screen. By default, the Login page displays the Sugar Suite module tabs on the Login page. Deselect this box if you do not want to display these tabs on the Login page.

Prevent user customizable subpanel layout. Select this box if you want to prevent users from customizing their detail page layout.

Show Full Name (not Login). Select this box if you want the full name for users displayed instead of their login names.

2. To save the settings, click **Save**.
3. To restore the default settings, click **Restore**; to exit the page without saving your changes, click **Cancel**.

Logos

You can upload your organization's logo to display in the Sugar Suite User Interface and in PDF copies of quotes.

To upload logos

1. Configure any of the following fields:

Current logo in use. Displays your current organization's logo that displays in the User Interface.

Upload new logo (212x40). Enter the path to the location of the logo that you want to upload from your local machine. Or, click Browse to navigate to the location of the logo on your local machine. The dimension should be 212 X 40, with the standard transparent background color, in PNG format.

Logo used in Quotes (85%). Displays your organization's logo at 85% of the default size that displays in PDF copies of quotes.

Upload new Quote Logo (867x74). Enter the path to the location of the logo that you want to upload from your local machine. Or, click Browse to navigate to the location of the logo on your local machine. The system displays this logo in PDFs of quotes that your users create.

2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

Generating Fonts for Quote PDFs. To enable users to create PDF versions of quotes and email them to customers directly from the Quotes detail view, you must ensure that the correct fonts are installed and specify the appropriate character set from the Import/Export Character Set drop-down list in the My Account page. On Microsoft Windows, if you are using USD or Western European fonts, you can select ISO-8859-1 (Western European and US) or CP 1252. The default character set in Sugar Suite is CP1252.

For other languages such as Japanese, you will have to create the appropriate font.

To generate a font for PDF files

1. Use a program such as Font Forge to generate PS Type1/Binary font of *.afm* (Adobe Font Metrics) type.
2. Copy the file into *sugarcrm/include/fonts*.
3. Navigate to the layout directories located in *sugarcrm/modules/Quotes/layouts/* or *sugarcrm/custom/modules/Quotes/layouts/*.
4. In any layout file such as Invoice, Standard, and Custom Layout, find the parameter “*\$font=include/fonts/FontName*” where *FontName* is the name of the font that you generated.
5. Save the file.
6. On the My Account page, select the appropriate character set for the chosen language.
7. Generate a quote PDF to ensure that the settings are correct.

LDAP and Active Directory Authentication Support

If your organization has implemented LDAP or Active Directory authentication, you can also enable authentication in Sugar Suite. When your users attempt to log into Sugar Suite, the application authenticates them against your LDAP directory or Active Directory. If authentication is successful, the user is allowed to log into Sugar Suite.

To enable authentication

1. In the LDAP Authentication Support sub-panel, select the Enable LDAP box and enter the following information:
 - Server.** Enter the LDAP server name.
 - Port Number.** Enter the server’s port number.
 - Base DN.** Enter the base DN name.

Bind Attribute. Enter the attribute name that is used to bind the user's name in LDAP.

Login attribute. Enter the attribute name that is used to search for the user in LDAP.

Authenticated User. Enter the user name.

Authenticated Password. Enter the user's password.

Auto Create Users. Select this option check the Sugar Suite database for the user name and add it if it does not exist in the database.

2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**.
4. To exit the System Settings page without saving your changes, click **Cancel**.

Proxy Settings

If you are using a proxy server to connect to the Internet, you will need to enter the information here to allow the system to check for Sugar Suite updates.

1. Configure the following fields:

Use proxy server. If you want to connect to the Internet through a proxy server, select this option.

The system displays fields to specify the proxy host and port number.

Proxy Host. Enter the name of the proxy server host

Port. Enter the port number for the proxy host.

Authentication. Select this box if you want to enable proxy authentication to allow Sugar Suite to connect to the company's proxy server.

User Name. Enter the user name.

Password. Enter a password for the user.

2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**.
4. To exit the System Settings page without saving your changes, click **Cancel**.

Customer Self-Service Portal

Select this option to integrate your organization's self-service portal with Sugar Suite. This enables your customers to access your Sugar Suite records such as Notes and Cases.

1. Select the Enable self-service portal integration box.
2. To save the setting, click **Save**.
3. To restore the previous setting, click **Restore**.
4. To exit the System Settings page without saving your changes, click **Cancel**.

SkypeOut

Select this option to allow users to make calls through Skype.

To enable Skype

1. Select the Enable SkypeOut integration box.
2. To save the setting, click **Save**.
3. To restore the previous setting, click **Restore**.
4. To exit the System Settings page without saving your changes, click **Cancel**.

Mail Merge

If you have installed the Sugar Plug-in for Microsoft Word, this option allows you to perform a mail merge with Word documents. For example, you can merge contact information from Sugar Suite with form letters created in Microsoft Word.

1. Select the **Enable mail merge** box.
2. To save the setting, click **Save**.
3. To restore the previous setting, click **Restore**.
4. To exit the System Settings page without saving your changes, click **Cancel**.

Export

Use this panel to specify export settings such as the delimiter used to separate data in export files and the default character set used to export data from Sugar Suite. The settings you specify here apply to all users in the organization. However, users can define a different default export character set on their My Account page to export data from Sugar Suite.

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

By default, Sugar Suite uses UTF-8 to store data and CP1252 to export data. For locales that use character encoding other than CP1252, you must specify the appropriate default character set. This ensures that the character set used by the Sugar system to create the exported file is mapped to the correct character set on the user's machine. For example, MS Windows uses SJIS in Japan. So, for users in this locale, you will need to select SJIS as the default export character set.

By default, both users and administrators can export files from Sugar Suite. However, you can prevent users from exporting files.

To export files

1. Set the following options:

Delimiter. Specify the delimiter, such as a comma or a period, to use while exporting data.

Default Export Character Set. The default is CP 1252. For locales other than US and Western Europe, select the appropriate character set from the drop-down list.

Disable export. Select this option if you want to prevent users and administrators from exporting data export.

Admin export only. Select this option if you want to allow only administrators to export data.

2. To save the settings, click **Save**.

3. To restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

Advanced

1. Select any of the following advanced configuration options:

Validate user IP address. Select this option to validate, for security purposes, the IP addresses of users who log into Sugar Suite.

Log slow queries. Select this option to log the system's slow responses to user queries in the *sugarcrm.log* file. This information is for performance tuning investigation.

Maximum upload size. Enter the maximum file size, in KB, that users are allowed to upload.

Note: The upload size is also dependent on PHP's upload settings.

Portal Session Timeout. Enter the maximum time, in seconds, for a SugarPortal session. The session will timeout when the time limit is reached.

Log memory usage. Select this option to record memory usage in the *sugarcrm.log* file.

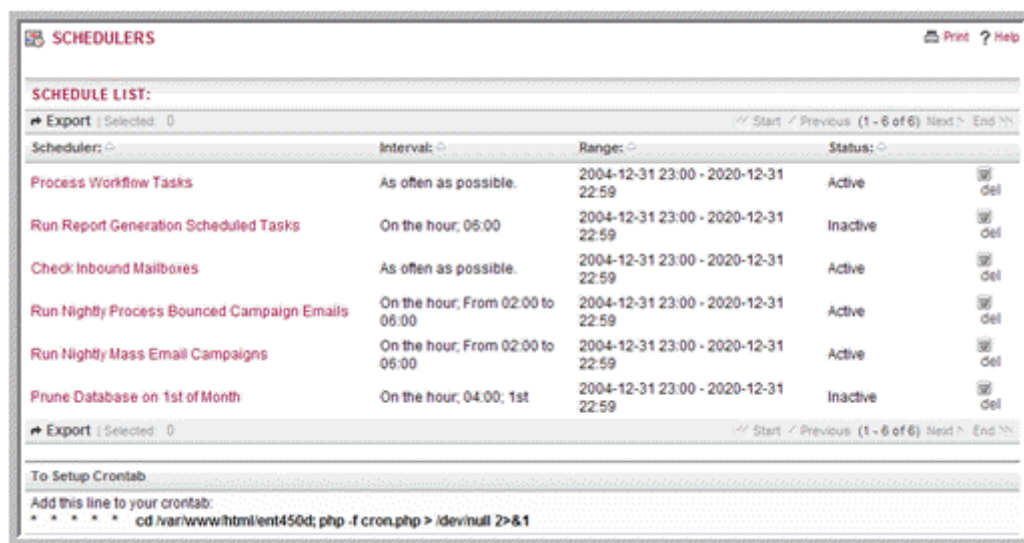
Slow query time threshold. Specify the threshold, in milliseconds, that defines slow queries. Queries that take longer than the threshold time are logged in the *sugarcrm.log* file. This information is for performance-tuning investigation.

Display stack trace of errors. When you select this option, if an error occurs when users are running the application, the system displays where the error occurred in the application's stack trace. This information is for debugging purposes.

2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

Scheduler

Use this option to schedule jobs such as running reports and dispatching campaign emails.



The screenshot shows a web interface titled "SCHEDULERS" with a "SCHEDULE LIST" section. It includes a table with columns for Scheduler, Interval, Range, and Status. Below the table, there is a section for "To Setup Crontab" with instructions to add a specific line to the crontab file.

Scheduler:	Interval:	Range:	Status:	
Process Workflow Tasks	As often as possible.	2004-12-31 23:00 - 2020-12-31 22:59	Active	del
Run Report Generation Scheduled Tasks	On the hour, 06:00	2004-12-31 23:00 - 2020-12-31 22:59	Inactive	del
Check Inbound Mailboxes	As often as possible.	2004-12-31 23:00 - 2020-12-31 22:59	Active	del
Run Nightly Process Bounced Campaign Emails	On the hour, From 02:00 to 06:00	2004-12-31 23:00 - 2020-12-31 22:59	Active	del
Run Nightly Mass Email Campaigns	On the hour, From 02:00 to 06:00	2004-12-31 23:00 - 2020-12-31 22:59	Active	del
Prune Database on 1st of Month	On the hour, 04:00, 1st	2004-12-31 23:00 - 2020-12-31 22:59	Inactive	del

To Setup Crontab
Add this line to your crontab:
* * * * * cd /var/www/html/ent450d; php -f cron.php > /dev/null 2>&1

The Scheduler integrates with external UNIX systems and Windows systems to run jobs that are scheduled through those systems. You can schedule the following types of jobs:

Process Workflow Tasks. This job processes workflow events. If you set a timed trigger for an event such as when a lead is a week old, then it finds the predefined workflow actions and fires them when appropriate.

Run Report Generation Scheduled Tasks. This job runs reports and emails them to the assigned user as per the schedule specified for a given report. The reports are sent to the user through an email from a PHP script that runs at regular intervals to send out the emails at the appropriate time. The user can choose which reports to receive and how often to send the reports in the Reports module of the Sugar Suite application.

Check Inbound Mailboxes. This job monitors inbound emails in active mailboxes that you set up using the Inbound Email option in the Email panel of the Admin page.

Run Nightly Process Bounced Campaign Emails. This job polls any mailbox in which, the “Possible Actions” parameter is set to “Bounce Handling”. This is an essential component of monitoring mass email campaigns.

Run Nightly Mass Email Campaigns. This job processes the outbound email queue for your organization’s mass campaign Emails.

Prune Database on 1st of Month. This job reads all the tables in your Sugar Suite database, finds records that have been soft-deleted (deleted = 1), creates a large SQL file, and physically deletes those records on the 1st of every month. It is mostly a performance job, and is not essential to the use of Sugar Suite. The backup files are placed in *cache/backups* with time-stamped filenames.

Configuring Settings for Scheduler Jobs

For UNIX and Linux systems, you will need to add a new Cronjob to your Crontab. For Microsoft Windows, you can use the Task Scheduler.

Unix and Linux Systems

To add a new cronjob to your crontab

1. At the command prompt, type `crontab -e`.
2. Enter the following line to your crontab:

```
* * * * * cd /path/to/sugar/crm; php -f cron.php >
/dev/null 2>&1
```

3. Ensure that the `/path/to/` is correct for your instance.
4. Save your changes and close.

If you encounter problems, do the following:

1. Determine who the Apache server runs as.

In a properly configured virtual host environment provided by your host, Apache will run as your Login user ID for files in your virtual directory. If you are unsure, contact the Customer Service department for your host.

- a. Search for a file named `httpd.conf`. Typically, this file is located in the `/etc` folder. It will vary with the distribution.
- b. Open the file using a text editor and locate a line that starts with “User”. The word(s) that follow it directly is the name of the User that Apache will run as on your system.

2. Determine the capabilities of your PHP installation.

The Sugar Scheduler is designed to work with PHP and its extensions; specifically the database connector, the IMAP libraries, and the cURL libraries.

Ensure that the PHP binary (`php-cli` or just `php`) is available and has those libraries available.

Search for the PHP binary as follows:

- a. Type `which php`. On most correctly configured PHP installations, you will find the binary in `/usr/bin` or `/usr/local/bin`. If so, move on to Step 3.
Or
- b. Type `find / -name php`. Typically, this command will return a long list. Parse through the list to find an executable file named `php`.
- c. If you cannot find the PHP binary, scroll down to the *Troubleshooting Tips* at the end of this section and read item No. 2.

3. Create a *cronjob* for the Apache user

- a. Type `crontab -e -u [the Apache user]`.
- b. Enter the following line to your crontab:

```
* * * * * cd /path/to/sugar/crm; php -f cron.php >
/dev/null 2&>1
```

- c. To fine tune this job, change the first two “*”. The first is the “Minutes” value, the second is the “Hours” value.

For example, to run the cronjob every 3 minutes, enter:

```
"/3 * * * * cd /path/to/sugar/crm; php -f
cron.php > /dev/null 2&>1
```

4. Test the crontab line as follows to confirm that your system is ready to run:
 - a. At a terminal prompt, copy and paste the command for your cronjob, and run it; the logic here is that if the command will execute successfully when run manually, the crontab will be able to execute successfully as well.
 - b. If your cronjob looks as follows:


```
* * * * * cd /var/www/html/sugarcrm; php -f cron.php
> /dev/null 2&>1
```

 type the command from "cd.." to "2&>1" into a terminal and press Enter.
 - c. If any errors occur, refer to **“Troubleshooting Tips” on page 18**.
5. Save your changes and close.

Microsoft Windows (2000, XP, Server) Systems

Set up the Windows batch file as follows:

1. Create a batch file that will execute all the necessary commands.
2. Enter the following paths in the batch file:
 - o `cd c:\path\to\your\sugarinstance`
This folder should contain the `cron.php` file.
 - o `c:\path\to\your\php.exe -c c:\windows\php.ini -f cron.php`
3. Run the batch file from a command prompt to ensure that the output has no errors.
4. If you encounter problems, do the following:
 - a. Determine which PHP binary to use based on your PHP version.

PHP 4.x

If your system has a 4.x version of PHP, the PHP-CGI binary is named `php.exe` and is typically located in the root folder of your PHP install folder. To allow it to interact with the dynamic libraries, specify the location of the `php.ini` file. This can vary from system to system. If you are unsure, assuming that `php.exe` is located in `C:\php`, enter the following command at the command prompt:

```
c:\php\php.exe -r phpinfo();
```

The system will identify the `php.ini` file and its location.

PHP 5.x

If your system has a 5.x version of PHP, the PHP-CGI binary is named `php-cgi.exe` (not `php-cli.exe`) and is typically located in the root folder of your PHP install folder. To allow it to interact with the dynamic libraries, specify the location of the `php.ini` file. This can vary from system to system. If you are unsure, enter the command described above.

The system will identify the `php.ini` file and its location.

5. Create the batch file.
 - a. Click Scheduler in the Systems panel of the Admin page.

At the bottom of the default screen, you will see the contents of the commands you need to add to a batch file.
 - b. Open *notepad.exe*, copy and paste what Sugar Suite's recommendation into a blank file.
 - c. Change the Save As Type to "dropdown to All Files *.*." and save it as a .bat file.

Note: Remember that this is only a recommendation, and may not work for your particular instance. Pay attention to the folder paths as they are often the cause for problems with the Scheduler.

6. Test the batch file.
 - a. From the command prompt, navigate to the folder where you saved the batch file.
 - b. Enter the full name of the batch file to execute it.
 - c. Note and correct any reported errors, usually related to paths that cannot be found.
7. Create a scheduled task.
 - a. Click **Start** and navigate to Control Panel/Scheduled Tasks/Add Scheduled Task.
 - b. Go through the Wizard, browse to the batch file you just created, and select it.
 - c. Schedule a daily job, and ensure that you select Open advanced properties for this task when I click finish.
 - d. On the Advanced Properties page, navigate to the Schedule tab and then click **Advanced**.
 - e. Check off Repeat task to enable the fields below it, and select Every Minute or specify the interval you think is appropriate.
8. Save your changes and close the Wizard.

To schedule a job

1. In the Shortcuts menu of the Scheduler home page, click **Create Scheduler**.
2. In the Basic Setup sub-panel, enter the following information:
 - Job Name.** Enter a name for the job.
 - Status.** From the drop-down list, select **Active** to run the job at the specified intervals; select **Inactive** if you only want to save the job schedule information but not run the job.
 - Job.** Select a job from the drop-down list. The OR field is not used.
 - Interval.** Specify the time interval to check for new scheduled jobs. The default is every one minute daily.
3. For advanced options, click the **Advanced Options** link below the Job field.

The Advanced Options sub-panel displays below.

4. Enter information for the following fields:
 - Execute If Missed.** Select this box to run any jobs that the scheduler missed.
 - Date & Time Start.** Click the Calendar icon and select the start date for the job; select the time, in hours and minutes, from the adjacent drop-down list.
 - Date & Time End.** Click the Calendar icon and select the end date for the job; select the time, in hours and minutes, from the adjacent drop-down list.
 - Active From.** From the drop-down list, select the time, in hours and minutes, when the job becomes active.
 - Active To.** From the drop-down list, select the time, in hours and minutes, when the job becomes inactive.
5. Click **Save** to create the job; click **Cancel** to exit the page without creating the job.

To manage scheduled jobs

1. In the System sub-panel of the Admin page, click **Scheduler**.

The Schedule List page displays.

Scheduler:	Interval:	Range:	Status:	
Process Workflow Tasks	As often as possible.	2004-12-31 23:00 - 2020-12-31 22:59	Active	del
Run Report Generation Scheduled Tasks	On the hour; 06:00	2004-12-31 23:00 - 2020-12-31 22:59	Inactive	del
Check Inbound Mailboxes	As often as possible.	2004-12-31 23:00 - 2020-12-31 22:59	Active	del
Run Nightly Process Bounced Campaign Emails	On the hour; From 02:00 to 06:00	2004-12-31 23:00 - 2020-12-31 22:59	Active	del
Run Nightly Mass Email Campaigns	On the hour; From 02:00 to 06:00	2004-12-31 23:00 - 2020-12-31 22:59	Active	del
Prune Database on 1st of Month	On the hour; 04:00; 1st	2004-12-31 23:00 - 2020-12-31 22:59	Inactive	del

To Setup Crontab
Add this line to your crontab:
* * * * * cd /var/www/html/ent450d; php -f cron.php > /dev/null 2>&1

2. Select any job from the job list to view its settings or the Job log. You can edit, duplicate, or delete the settings. You can also delete a job by clicking the del icon corresponding to the job in the Schedule list.

Job	Status
function: pollMonitoredInboxesForBouncedCampaignEmails	Active
Date & Time Start: 2005-01-01 07:00	Active From: Always
Date & Time End: perpetual	Active To: Always
Last Successful Run: Never	Interval: On the hour; From 02:00 to 06:00
Execute If Missed: Always	
Date Created: 2005-10-11 21:53 by	Last Modified: 2005-10-11 21:53 by admin

3. To edit the settings, click **Edit**.
4. Make the necessary changes and click **Save** to update the settings; click **Cancel** to exit the page without saving your changes.

Troubleshooting Tips

Linux

1. The Sugar Scheduler fails to run even though the *cron.log* file shows that the crontab is triggering the new job.
 - o The Apache user's PATH does not include the location of the PHP binary.
 - Change the crontab entry to include the FULL path to the PHP binary as shown below:

```
* * * * * /usr/local/bin/php -f cron.php > /dev/null 2&>1
```
 - o The Apache user's PATH does not include the location of the *php.ini* file, and thus the external libraries (such as *mod_mysql* and *mod_imap*) are unavailable at run time.
 - Change the crontab entry to include a PHP switch to explicitly define a *php.ini* to use as shown below.

```
* * * * * php -c /path/to/your/php.ini -f cron.php > /dev/null 2&>1"
```
2. No PHP binary found or it is broken.
 - o Change the mechanism by which your cronjob calls Sugar's *cron.php*.
 - Determine if this is an option at this time by finding either “curl” or “wget” on your system. This is done with the commands “which curl” and “which wget”.

If you use *cURL*, your crontab entry should look as follows:

```
* * * * * curl --silent http://yourdomain/
yoursugarcrminstance/cron.php
```

If you use *wget*, your crontab entry should look like:

```
* * * * * wget -q http://yourdomain/
yoursugarcrminstance/cron.php
```

Note: Both *curl* and *wget* have numerous switches that do not always map to different versions on different platforms. Experiment in the terminal until you find the “perfect” line, and add it as the line for your crontab entry.

Windows.

1. The most common problem is that the PHP binary does not have the proper libraries available at run time. As a result, it cannot make calls to your database or to your email server. To force PHP to be aware of these libraries, it needs to access the *php.ini* file, which in turn tells it where to find everything that is available.
 - a. Locate the *php.ini* file: if you are unsure, run the following command:

```
phpinfo();
```

The system identifies the *php.ini* file and its location.

2. The second most common breakage is incorrect paths to the extensions that PHP needs; a map is useless if the information is bad.
 - a. Open *php.ini* in your favorite text editor.
 - b. Find the section named “Paths and Directories”.
 - c. The pertinent entry is “`extension_dir`”.
 - d. Keeping in mind that this file piggybacks on Window's \$PATH\$ variable, double-check the paths listed.
 - e. Correct any errors - sometimes giving an absolute path solves hard-to-diagnose problems, i.e., full path listing from `c:\...` onwards.
Necessary extensions are disabled.
 - f. Open your *php.ini* file in a text editor.
 - g. Find the section named “Dynamic Extensions”.
 - h. Scroll to the Windows-specific list.
 - i. Make sure that the necessary extensions are uncommented (no “;” preceding the line). The bare minimum for Sugar Scheduler to run is to have `php_curl`, your database connector, typically `php_mysql` (for PHP5), and `php_imap`.
 - j. Test the batch file again.

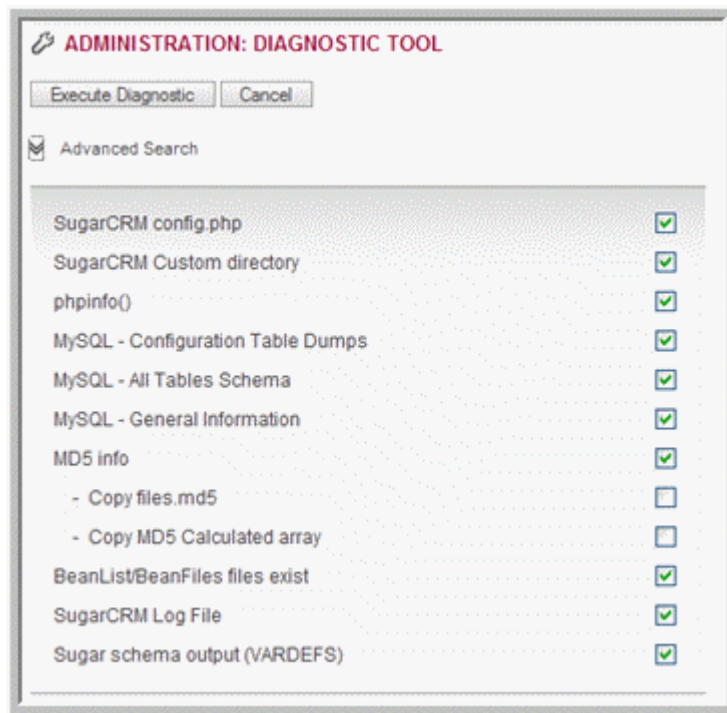
Diagnostic Tool

Use this option to capture system configuration for diagnostics and analysis. The diagnostic tool pulls up system information and stores it in a zip file on the server for download. When you send a help request to Customer Support, you can attach the file because it summarizes all the basic information required to resolve the problem.

To capture system configuration

1. On the Diagnostic Tool page, click **Execute Diagnostic** to run the tool.
2. To capture specific configuration information, click the **Advanced** link below the **Execute Diagnostic** button.

The system displays a list of system configuration files. By default, the system captures configuration information for all the selected files.



The system performs the following actions of these files:

SugarCRM Config.php - Copies the *config.php* file from the root directory after replacing the DB password with asterisk for security purposes.

SugarCRM Custom directory - Copies the custom directory to a Zip file to enable Customer Support to know what has been customized through the Layout Editor.

phpinfo() - Executes `phpinfo` and stores it in a file.

MySQL - Configuration Table Dumps - copies a few tables from the database and replaces sensitive information with asterisk for security purposes.

MySQL - All Tables Schema - writes the schema for all tables to an HTML file.

MySQL - General Information - Pulls up some general information, like MySQL version, character sets, etc.

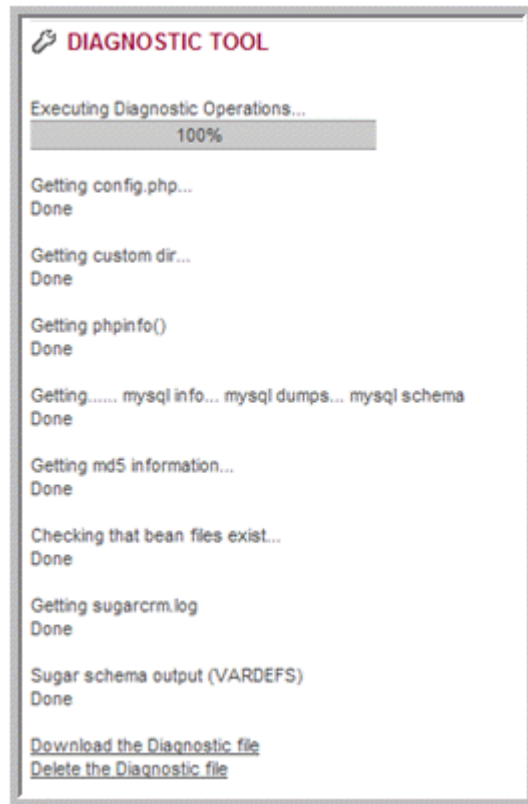
MD5 info - Runs md5 checks on all files in the sugar directory and compares it against a stock Sugar installation's md5s. This enables Customer Support to learn which, if any, files have been manually customized.

BeanList/BeanFiles files exist - If a custom module has been loaded, and the author did not define these references correctly, it can cause problems. This action checks all the references to ensure they are correct.

SugarCRM Log file - copies the log file.

3. Deselect the ones you do not want to view and then click **Execute Diagnostic**.

The system creates a Zip file that contains the captured configuration information.



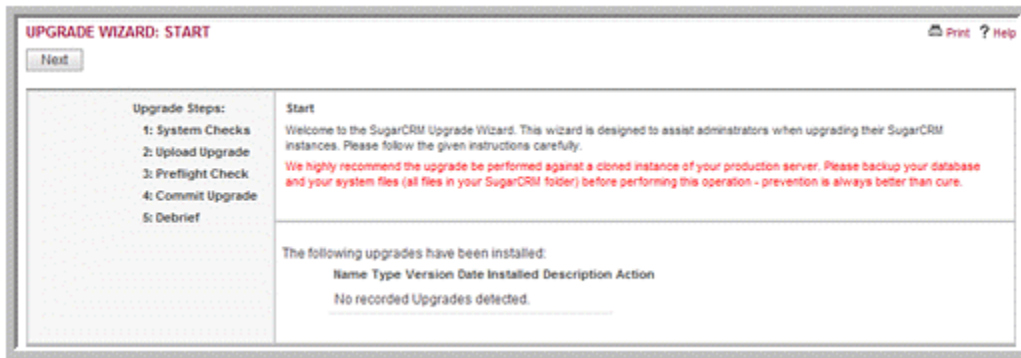
4. To view the file, click the **Download the Diagnostic file** link at the bottom of the page; to delete the file, click the **Delete the Diagnostic file** link.
5. If you choose to download the file, the File Download dialog box displays. To view its contents, click **Open**, and click the file you want to view. To save the Zip file contents, click **Save**, and select a location on your local machine.

Upgrade Wizard

The Upgrade Wizard provides a quick way to upload and install new Sugar Suite versions as well as upgrade existing ones. Before using the Upgrade Wizard, ensure that the *config.php* file for your installation is writable.

To upgrade your Sugar Suite application

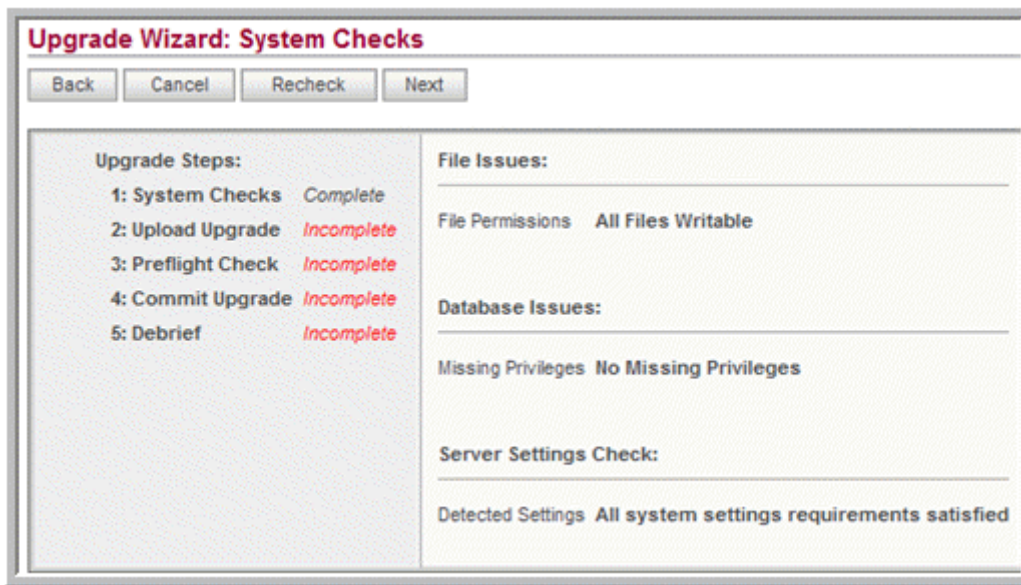
1. Click the **Upgrade Wizard** option on the Administration page.



The Upgrade Wizard screen displays.

2. Click **Next**.

The System Checks screen displays.




If the check finds no errors, the status of System Checks changes from Incomplete to Complete.

3. Click **Next**.


The Upload Upgrade screen displays.

The file SugarEnt-Upgrade-4.2.1-to-4.5.0d.zip has been uploaded.

 **Administration: Upgrade Wizard**

Upload an upgrade:

The following upgrades are ready to be installed:

Name	Type	Version	Date Published	Uninstallable	Description	
 SugarEnt Patch		4.5.0d	2006-10-06 23:14:55	No	None	<input type="button" value="Install"/> <input type="button" value="Delete Package"/>


The following upgrades have been installed:

Name	Type	Version	Date Installed	Description	Action
No recorded upgrades.					

- Click **Browse** to navigate to the location of the upgrade zip file and then click **Upload**.


The system displays the package to be installed. If you want to remove the file, click **Delete Package**.

- Click **Install**.

 **Administration: Upgrade Wizard**

Upload an upgrade:

The following upgrades are ready to be installed:


Name	Type	Version	Date Published	Uninstallable	Description	
 SugarEnt Patch		4.5.0d	2006-10-06 23:14:55	No	None	<input type="button" value="Install"/> <input type="button" value="Delete Package"/>

The following upgrades have been installed:

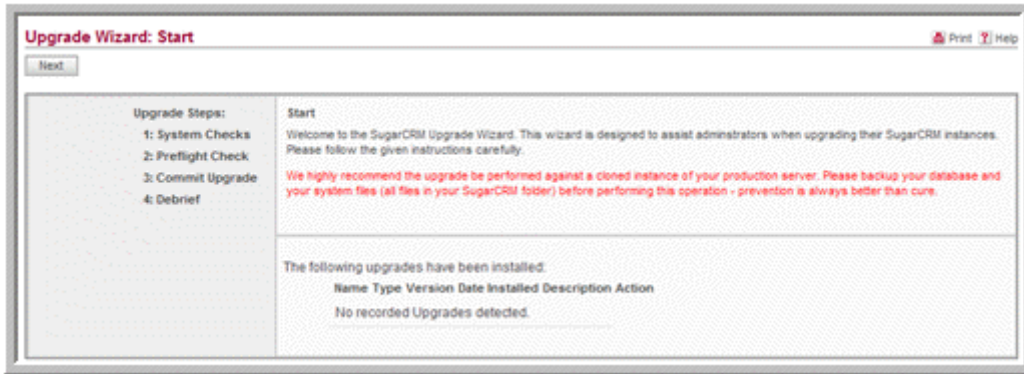
Name	Type	Version	Date Installed	Description	Action
No recorded upgrades.					

- Click **Commit**.

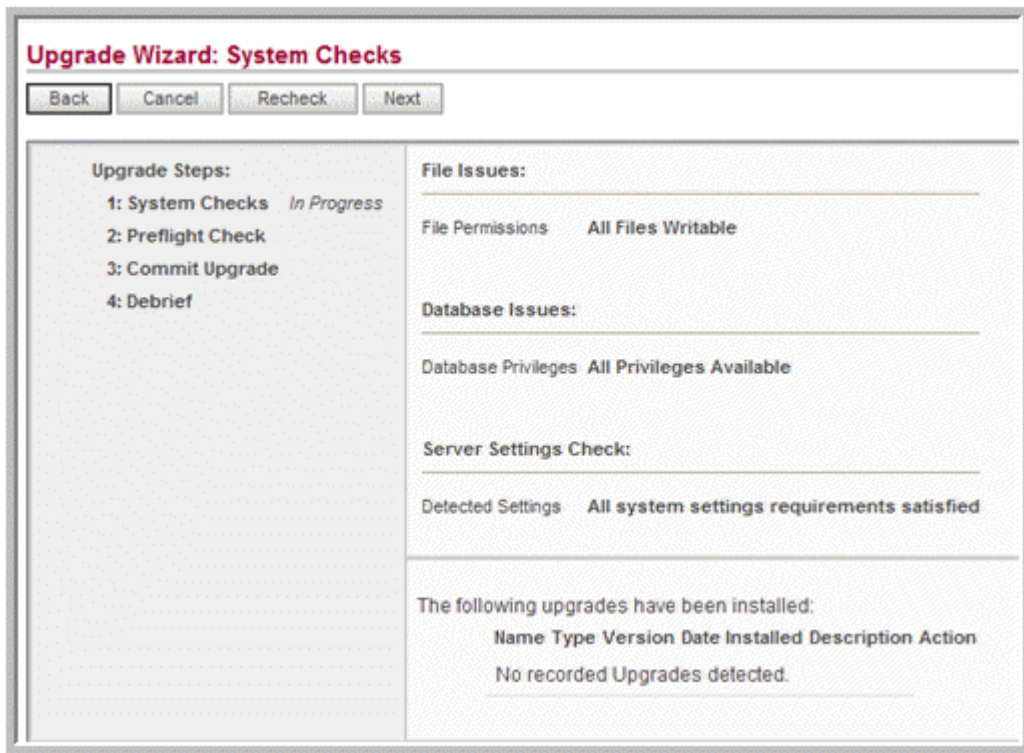
The patch is ready to proceed. Click the "Commit" button below to complete the upgrade process.

[Show Details](#) 

The upgrade process, which consists of several steps, begins.

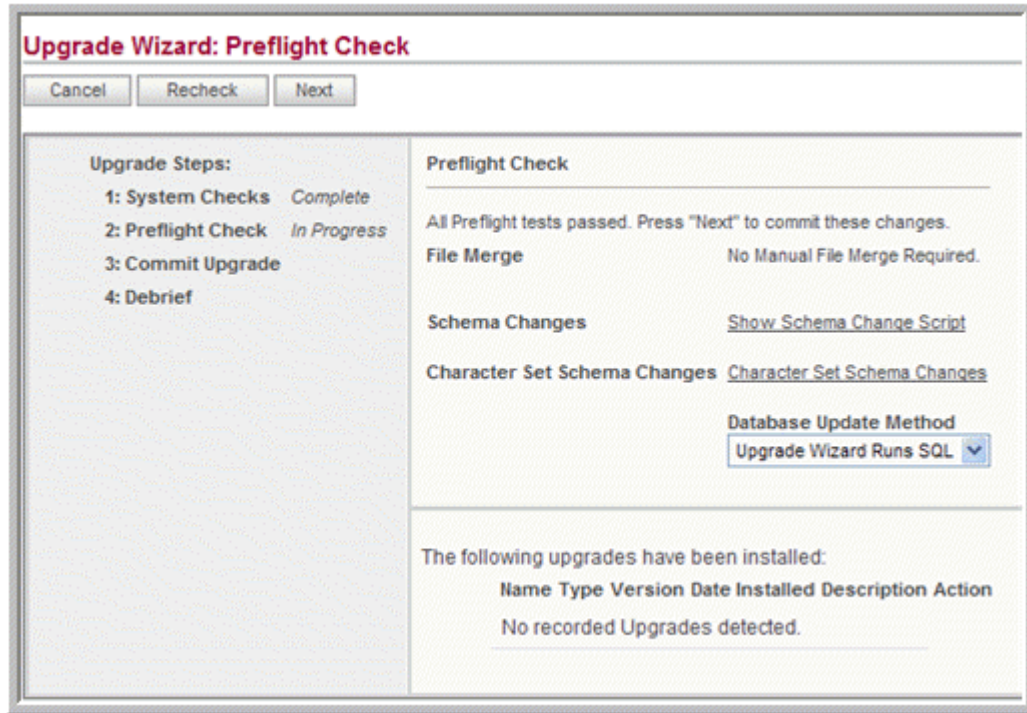


7. Click **Next** to begin the system checks.



8. After the system checks complete, click **Next** to begin the preflight check.

The Preflight Check screen displays and the Upgrader begins checking queries.

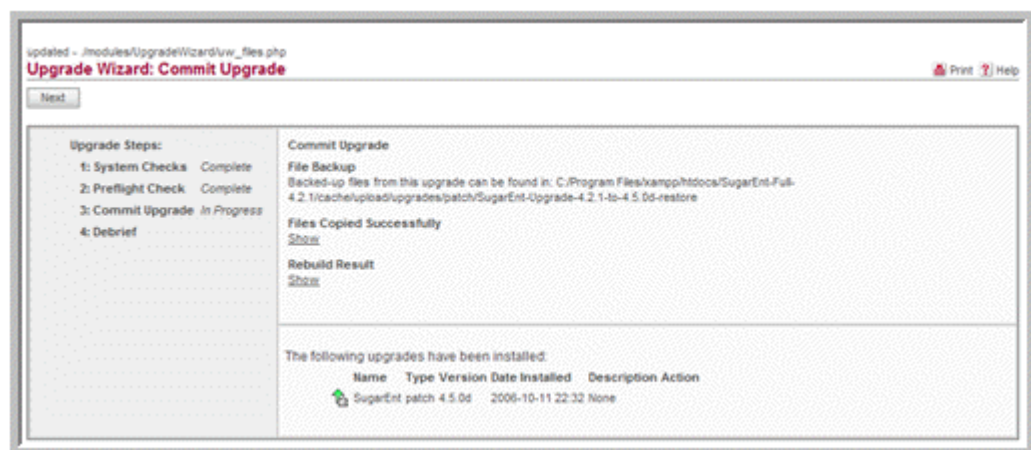


To run customized queries, you can select Manual SQL Queries from the Database Update Method drop-down list, and enter your queries in the field that displays below.

When the check completes successfully, the status of Preflight Check changes from Incomplete to In Progress.

9. Click **Next**.

The Commit Upgrade screen displays and the upload process begins.



10. After the upload completes, click **Next**.

The Debrief screen confirms that the upgrade has been installed.

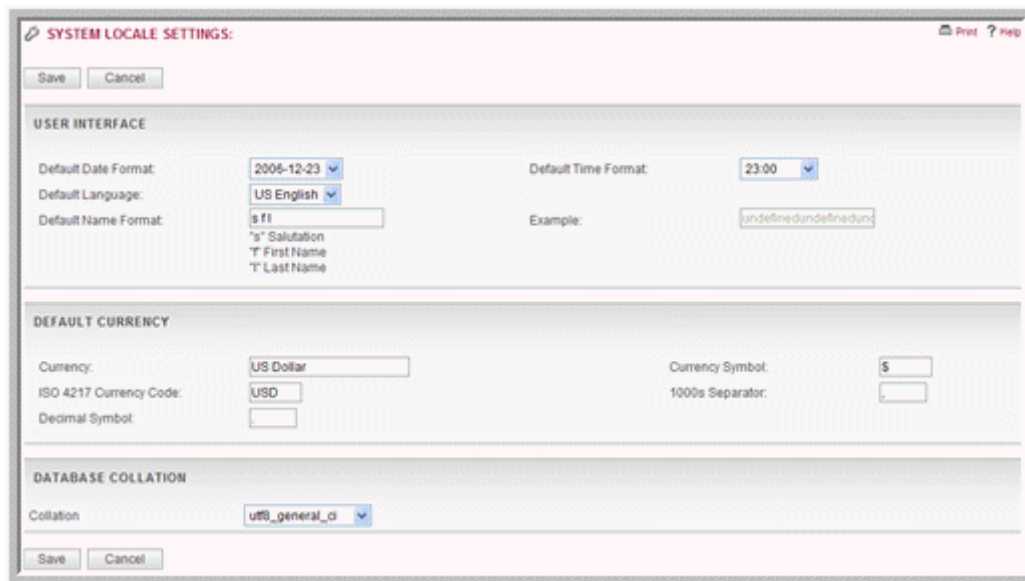


11. Click **Done**.

The upgrade is now complete.

Locale Settings

Use this option to set system-wide default formats for date, time, language, name, and currency. If you are using MySQL, you can also specify the collation order for records in the application.



User Interface

Default Date Format. From the drop-down list, select a date format for all records such as Quotes and Contracts. Users can override the default format by setting a different date format in their My Account page.

Default Time Format. From the drop-down list, select a time format to display in all records such as Cases. Users can override the default format by setting a different time format in their My Account page.

Default Language. From the drop-down list, select the default language for the Sugar Suite User Interface. Users can select a different language from the login page, provided they have installed the appropriate language pack.

Default Name Format. Enter the default salutation and name format to display in list views and detail views. You can specify any combination of salutation first name, and last name. For example: Mr. John Smith, Mr. Smith, or John Smith. Users can override the default format by setting a different time format in their My Account page.

To save the settings, click **Save**.

To restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

Default Currency

Select this option if you want to override the default currency that you set during installation. Users can override the default currency that you specify on their My Account page.

Currency name. Enter the name of the currency that your organization uses to conduct business.

Currency symbol. Enter the symbol for the currency.

ISO 4217 currency code. Enter the ISO code for the currency.

1000s separator. Specify a delimiter to separate thousands when users specify a numeric value for the amount.

Decimal symbol. Specify a default decimal symbol.

Database Collation

This sub-panel displays only if you are using the MYSQL database. You can select the desired collation order from the drop-down list. The default is `utf8_general_ci`.

To save the settings, click **Save**.

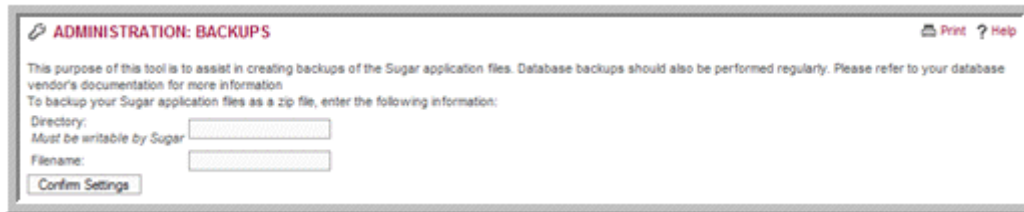
To restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

Backups

Use this option to backup the Sugar Suite configuration files. Note that this option does not backup the database.

To backup Sugar Suite configuration files

1. Click the **Backups** option in the System sub-panel on the Admin page.

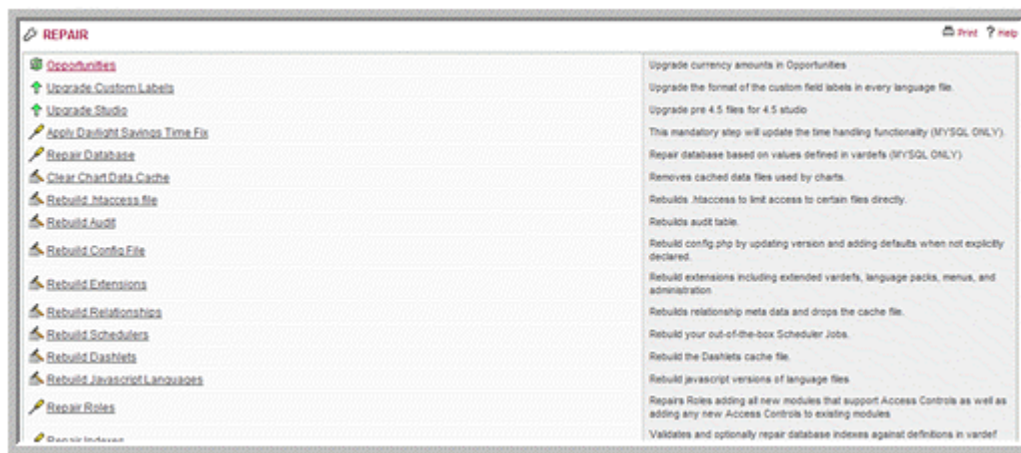


2. In the Directory field, specify a directory that is writable by the same user as the Apache process.
3. In the Filename field, enter a file name for the Zip file including the .zip extension.
4. To ensure that backup can be performed, click **Confirm Settings**.
5. Click **Run Backup** to create the .zip file of your Sugar application files.

Note: To backup your database information, refer to your database vendor's documentation.

Repair

Use this option to upgrade and rebuild data from a previous version of Sugar Suite for the current version of the program. You also use this option to convert a Sugar Suite installation to offline mode.



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.

Upgrade Teams: Scans all users to ensure that they each have a personal team, and that they are members of the global team, automatically fixing any discrepancies after an upgrade. It may also be useful to restore all users' personal teams if they become corrupted or are removed for any reason.

Upgrade Custom Labels: Upgrades the format of the custom field labels in every language file.

Upgrade Studio: Upgrades Studio to incorporate functionality such as rearranging fields to reconfigure a module's layout.

Apply Daylight Savings Time Fix: Updates the time handling functionality for MySQL databases. This step is mandatory.

Repair Database: This option is applicable to MYSQL databases only. It repairs your Sugar Suite database based on values defined in Vardefs. You can choose to display the SQL that will be executed on the screen, export it, or execute it.

Repair Entry Points: Run this script if you receive a 'Not A Valid Entry Point' error.

Clear Chart Data Cache: Removes cached data files that charts use.

Rebuild .htaccess file: Rebuilds the *.htaccess* file to limit access to certain files directly.

Rebuild Audit: Rebuilds the audit table.

Rebuild Config File: Rebuilds the *config.php* file by updating the version and adding defaults when not explicitly declared.

Rebuild Extensions: Rebuilds extensions including extended vardefs, language packs, menus, and administration

Rebuild Relationships: Rebuilds relationship metadata and drops the cache file.

Rebuild Schedulers: Rebuilds your out-of-the-box Scheduler Jobs.

Rebuild Dashlets: Rebuilds the Dashlets cache file.

Rebuild Javascript Languages: Rebuilds Javascript versions of language files.

Repair Roles: Repairs roles by adding all new modules that support access control as well as any new access controls to existing modules.

Repair Indexes: Validates and, optionally, repairs database indexes against definitions in *vardef* files.

Currencies

Use this option to specify a default currency and the rate.

The screenshot displays the 'CURRENCIES' management page. At the top, there is a 'Print ? Help' link. Below the title, a table lists existing currencies:

Currency Name	ISO 4217 Code	Currency Symbol	Conversion Rate	Status
US Dollar	USD	\$	1.0000000000	Active
Euro	EUR	€	0.9000000000	Active

Below the table, there is a 'CURRENCY' section with 'Save' and 'Clear' buttons. The form fields are:

- Currency Name: *
- Conversion Rate: *
- Status: * (Active)
- ISO 4217 Code: *
- Currency Symbol: *

For each new currency that you define, enter the name, symbol (for example, \$), conversion rate to the US \$, and the currency code (such as CDN for the Canadian dollar). Note that each user can select his default currency in the User Management screen.

Note: To display the Euro symbol in charts, you will need to install Macromedia Flash8.

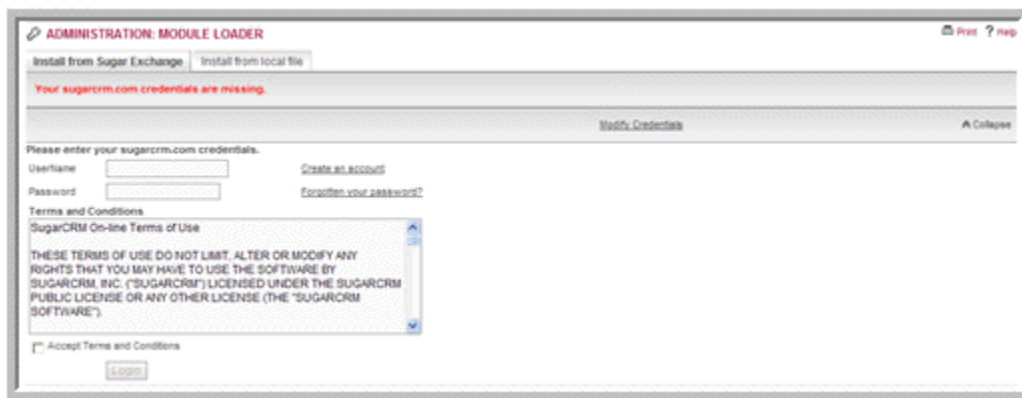
Module Loader

Use the Module Loader to upload the latest patches, custom modules, language packs, dashlets, and themes from Sugar Exchange. Custom modules are provided as Zip files. A history of all modules that have been queued and installed displays on the list.

You can install a module directly from the Sugar Exchange to your Sugar application. You can also upload the module from Sugar Exchange to your local machine and then upload it to your Sugar application at a later date. When you installing a module directly from the Sugar Exchange, you can check for the latest version.

To install a module from Sugar Exchange

1. On the System sub-panel of the Administration Home page, click **Module Loader**. The Module Loader Home page displays.

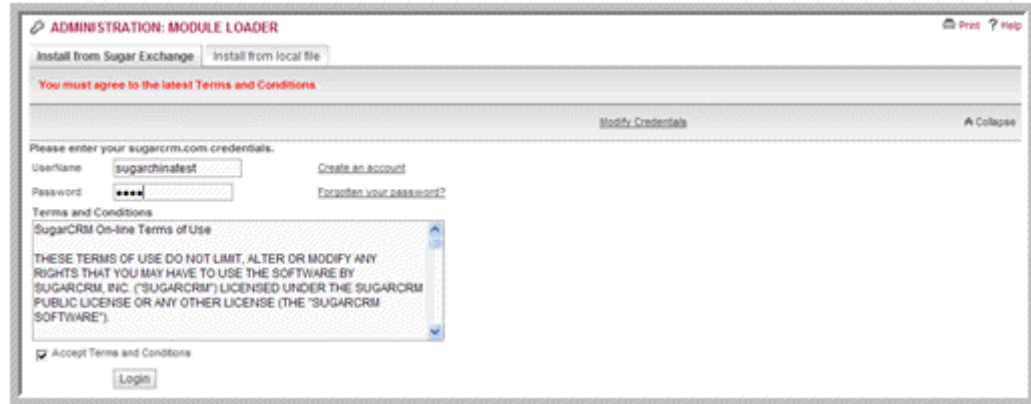


2. On the Install from Sugar Exchange tab, enter your Sugar Exchange user name and password.

If you do not have one, click the **Create an account** link that is adjacent to **UserName** to view the registration form. Enter the information and click **Send Registration**.

3. Select the Accept Terms and Conditions box to accept the license agreement.

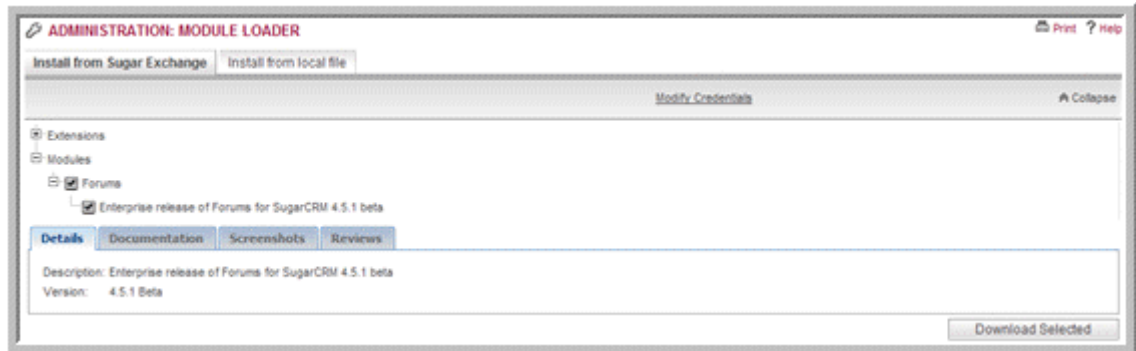
4. Click **Login**.



The screenshot shows the 'ADMINISTRATION: MODULE LOADER' interface. At the top, there are two buttons: 'Install from Sugar Exchange' and 'Install from local file'. Below this is a red warning message: 'You must agree to the latest Terms and Conditions'. A 'Modify Credentials' link and a 'Collapse' button are also visible. The main section prompts the user to 'Please enter your sugarcrm.com credentials.' It includes a 'Username' field with 'sugarchinatest', a 'Password' field with masked characters, and links for 'Create an account' and 'Forgot your password?'. A 'Terms and Conditions' section is expanded, showing the 'SugarCRM On-line Terms of Use' with a checkbox for 'Accept Terms and Conditions'. A 'Login' button is at the bottom.

5. Click the Plus sign (+) next to **Modules**.

The available custom modules display below.



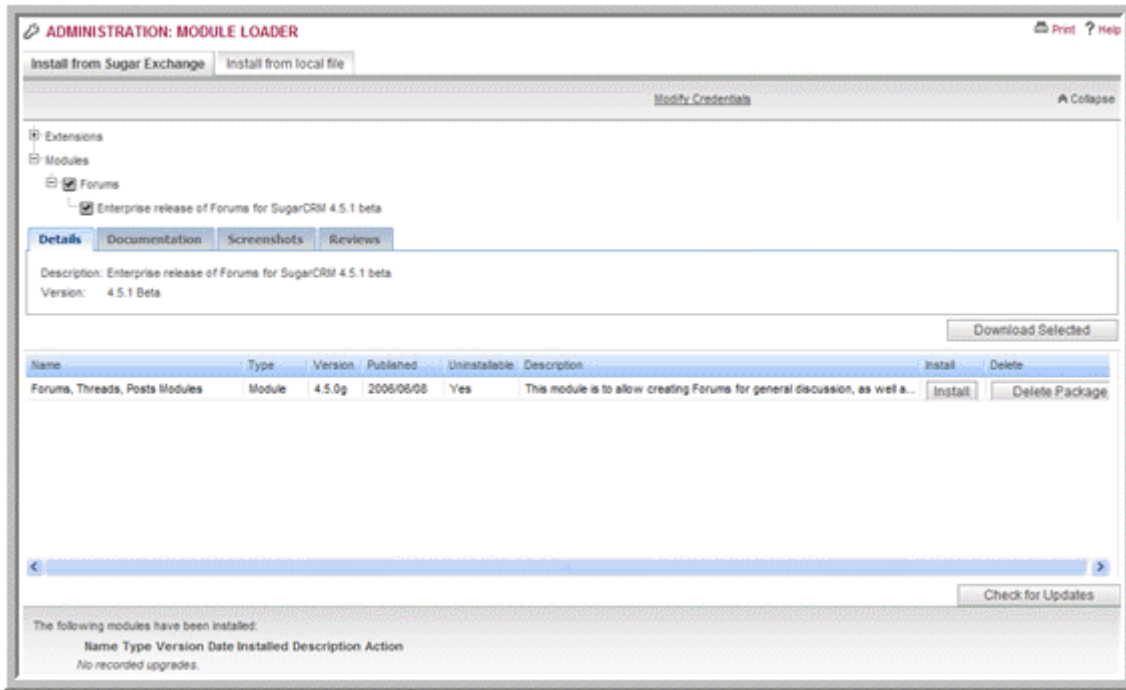
The screenshot shows the 'ADMINISTRATION: MODULE LOADER' interface with the 'Modules' section expanded. Under 'Modules', there is a 'Forums' sub-section with a checkbox that is checked. Below it, another checkbox is checked for 'Enterprise release of Forums for SugarCRM 4.5.1 beta'. A 'Details' tab is selected, showing the following information: 'Description: Enterprise release of Forums for SugarCRM 4.5.1 beta' and 'Version: 4.5.1 Beta'. Other tabs include 'Documentation', 'Screenshots', and 'Reviews'. A 'Download Selected' button is located at the bottom right.

6. Select the module that you want to install.

The description and version number of the selected module displays on the Details tab below.

7. Click **Download Selected** and click **OK** to confirm your decision.

The downloaded module display below.

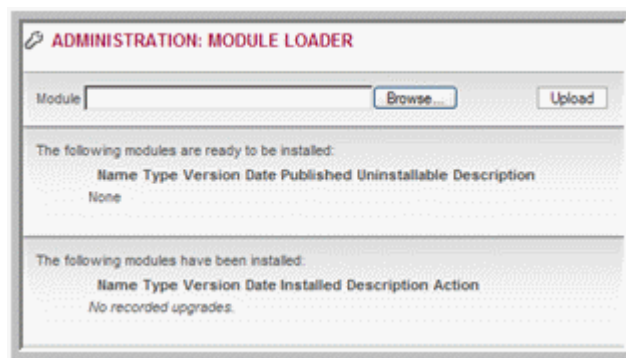


8. To install the module, click **Install**; to delete the module, click **Delete Package**.
9. To check for updates, click **Check for Updates**.

To install a module from your local machine

1. Select the Install From Local File tab.
2. In the Upload a module field, enter the path to the module or click **Browse** to navigate to the location of the module's .zip file.
3. Click **Upload**.

The system queues the module on the local server for installation.



4. Click **Install** to unzip the module file; to unload the module, click **Delete Package**.

The Module Loader unzips the Module file and displays a message stating that the module is ready to be installed.

5. Click **Commit** to install the module.
If the installation is successful, the system displays a message stating that the module installed successfully.
6. To go back to the Module Loader page, click **Back to the Module Loader**.
The new module is listed on the page.

To uninstall a module

1. To uninstall the module, click **Uninstall**.
The system displays a message stating that the module is ready to be uninstalled
2. Click **Commit** to uninstall the module.
The module is removed from Sugar Suite.

Users

Use this sub-panel to manage users, and roles for your organization.

User Management

Use the User Management option to create, edit, activate, and deactivate users in Sugar Suite.

You can create an end-user, an administrator, a group user, or a portal-only user.

An *end-user* can access and use Sugar Suite modules but does not have administrative privileges.

An *administrator* has administrative privileges in Sugar Suite to perform tasks such as creating users.

A *group user* is a bucket that you use to collect inbound emails for distribution. A group user is not a real user and, therefore, cannot log into Sugar Suite. You create a group user when you create a group for an inbound email inbox as described in **“Inbound Email” on page 46**. For example, you can create a group user named Support to handle customer support issues. In a workflow, to assign tasks to a group instead of a specific user, you can use the group user. These tasks can then be distributed to the appropriate users from the group inbox.

A *portal-only user* is a user who can log into portals created in Sugar Suite but cannot log into the Sugar Suite application.

When you create a user, by default, the system creates an end-user unless you specify Administrator, Group User, or Portal Only User.

After you create an end-user, administrator, or portal-only user, the user name displays in the users list on the Users Home page and the employees list on the Employees Home page. Group user names display in the users list as group users and does not display in the employees list.

Note: You cannot delete users but you can deactivate them.

To create a user

1. In the Users sub-panel of the Administration Home page, click **User Management**.

USERS: HOME Print ? Help

USER SEARCH

First Name Last Name Department Status Advanced Search

USERS

Export | Selected: 0 Start / Previous (1 - 7 of 7) Next / End

<input type="checkbox"/>	Name	User Name	Department	Email	Primary Phone	Status	Admin	Group
<input type="checkbox"/>	Administrator	admin				Active	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Jim Brennan	jim		jim@example.com		Active		
<input type="checkbox"/>	Sally Bronsen	sally		sally@example.com		Active		
<input type="checkbox"/>	Max Jensen	max		max@example.com		Active		
<input type="checkbox"/>	Chris Olliver	chris		chris@example.com		Active		
<input type="checkbox"/>	Sarah Smith	sarah		sarah@example.com		Active		
<input type="checkbox"/>	Will Westin	will		will@example.com		Active		

Export | Selected: 0 Start / Previous (1 - 7 of 7) Next / End

Clear All

MAS S UPDATE

Offline Client Status Status

The Users Home page displays.

2. In the Shortcuts menu, click **Create Users**.

The screenshot shows the 'USERS: 0' page in SugarCRM. At the top, there are 'Save' and 'Cancel' buttons. Below them are input fields for 'First Name', 'Last Name', 'User Name', 'Password', and 'Confirm Password'. A 'Status' dropdown menu is set to 'Active'. The 'USER SETTINGS' section includes checkboxes for 'Administrator', 'Group User', 'Portal Only User', 'Notify on Assignment' (checked), 'Show gridlines', 'Display reminder?', 'Mail Merge', and 'Export Delimiter'. The 'LOCALE SETTINGS' section includes dropdowns for 'Date format' (2006-12-23), 'Time Format' (23:00), 'Time zone' (America/Los Angeles (GMT-6) (+DST)), 'Currency' (US Dollar: \$), and 'Currency Significant Digits' (2). There is also an 'Example' text field and a '1000s separator' field.

3. On the Users page, enter the following information:
 - a. In the top sub-panel, enter the user name, the login name and password, and the user status.
 - b. In the User Settings sub-panel, select the appropriate option to specify whether the user is an administrator, an end-user, a group user, or a portal-only user. If you do not select any of these options, the system creates an end-user.
 You can enable email notifications to the user when a record is assigned to that person. You can also enable automatic reminders for upcoming meetings and calls. If the user has access to the Sugar Plug-in for Microsoft Word, you can enable the Mail Merge option.
 - c. The Locale Settings sub-panel displays the default values for the date and time format, the time zone, decimal symbol, and currency values as specified on the System Settings page. However, you can change these values for individual users if necessary.
 - d. In the User Information sub-panel, specify whether the user is still active, terminated, or on a leave of absence, the title, department, phone numbers, IM (Instant Messenger) type and ID. You can add comments in the Notes field, if necessary.
 - e. In the Address Information sub-panel, specify the user's home address.
 - f. In the Calendar Options sub-panel, you can enter a Publish Key to prevent others from publishing the user's calendar without authorization.

- g. In the Edit Tabs sub-panel, you can limit access to Sugar Suite modules by granting the user access only to specific modules, depending on the tasks that the user needs to perform. By default, the user has access to all the modules. To hide a module from the user's view, move the module tab to the Hide Tabs list using the Arrow buttons. Similarly, to display a module to a user, move it from the Hide Tabs list to the Display Tabs list.

To apply these settings to all users, move the modules from the Hide Tabs list to the Remove Tabs list.

To move up a module, select the module in the Display Tabs list and click the up arrow; to move down the module, click the down arrow.

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

- h. In the Email Options sub-panel, you can enter the user's email addresses, the user name and address that displays in outbound emails. You can also create or select an existing signature for the user. By default, the email format is HTML, but you can change it to plain text format. You can also choose to display email counts.
- i. In the Outbound Email Settings sub-panel, select the Mail transfer agent for the user's outbound emails. You can choose either Sendmail or SMTP.
- j. In the Inbound Email Settings sub-panel, you can specify Mail Server information such as its address, protocol, port number, status, user name and password. To ensure that the settings are accurate, click **Test Settings**.

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

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

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

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

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

- 4. To create the user, click **Save**; click **Cancel** to exit the page without saving your changes.
- 5. To change the user password, click **Change Password**, enter the new password, and save it.

After you create the user, the system adds the user name to the user list on the Users Home page.

To manage user information

- 1. To update the status of some or all users, use the Mass Update panel on the Users Home page as described in "Editing and Deleting Multiple Records in the *Sugar Open Source User Guide*.

2. To view a user's details, click the user's name in the Users list.
3. To edit user details, on the detail page, click **Edit**, change the information as needed, and click **Save**.
4. To duplicate the user details, on the detail page, click **Duplicate**, edit the information as necessary, and click **Save**.
5. To change the user password, on the detail page, click **Change Password**, enter the new password, and click **Save**.

Role Management

Roles allows you to control what actions users are allowed to perform, what modules users are allowed to access, and what records in a module users are allowed to have access to in your Sugar Suite installation.

Roles have the following characteristics:

A role can allow users to view all records in any subset of modules (Professional and Enterprise installations only).

A role can remove access to any subset of modules.

A role can restrict or remove a user's ability to perform actions on records that they can view in any subset of modules.

Users are only affected by roles that are assigned to them. Each user can be assigned zero, one, or multiple roles. Each role can be assigned to zero, one, or multiple users.

When you first install Sugar Suite, every user will have access to all modules. To restrict access to modules, restrict specific actions in a module, or control which records a user has access to, you will need to create roles. For example, if you want to prevent engineers in your organization from having access to opportunities, you can create a role that does not grant access to the Opportunities module. When you assign this role to an engineer, that individual will no longer be able to access the Opportunities module. For a junior sales representative, you may want to create a role that prevents them from deleting opportunities, accounts, or contacts and that will not let them export anything from the system.

All changes to roles such as changing role definitions, granting, or revoking roles to and from users take effect upon new login sessions. When you deny access to a module, the related sub-panels that display on other module pages are also removed.

Note: Because item records are assigned to a team to take action, a user must not only belong to the right role but also to the team assigned to a record in order to perform actions on that record.

When you create a role, you specify the modules that assigned users can access, the user type such as end-user or administrator, and the actions that they can perform.

Privileges are as follows:

- **List:** List views of records in the module. The user is unable to access the module's list view when this privilege is not available.

- **View:** View records in the module. The user is unable to access the module detail view when this privilege is not available.
- **Edit:** Edit records in the module. If None is selected, the Edit button is disabled on the detail page. Additionally, the user cannot use the Mass Update panel to update records for the module.
- **Delete:** Delete records in the module. If None is selected, the Delete button is disabled on the detail page.
- **Export:** Export record data in the module. The Export link located at the top of List views is removed when this privilege is not available to the user.
- **Import:** Import record data in the module. The Import link in the navigation bar does not appear when this privilege is not available.

Access Type options are as follows:

- **Enabled:** permits the user to view the module.
- **Disabled:** hides the module from the user's view.
- **Default:** leaves the setting unchanged.

User Type options are as follows:

- **Normal:** specifies end-user privileges in the module.
- **Admin:** specifies administrator privileges in the module.
- **Default:** leaves the setting unchanged.

Action options are as follows:

- **All:** all users who are assigned to the role can perform the action.
- **Owner:** the user who is assigned to the record can perform the action. If there is no assigned user, then the user who created the record can perform the action.
- **None:** prevents all users assigned to the role from performing the action.
- **Default:** leaves the setting unchanged.

Assigning a user to multiple roles can cause conflicts. For example, if a user is assigned to two roles pertaining to one module where one role grants them administrator access and the other grants them end-user access, then the role with the more restrictive values wins (in this case, the end-user access overrides the role with the administrative access because it is more restrictive).

In order to prevent such conflicts, Sugar Suite provides the "Default" value. Setting the default value makes sure that a role does not affect a particular setting. This allows simple roles to be constructed and then combined to achieve the desired security level.

For example, if a user is assigned to the following two roles:

Role A, where User Type = Admin and Export (action) = None

Role B, where User Type = Normal and Export (action) = All

Then, the user can only see records that are assigned to a team that they are members of. They cannot export data.

If you change the User Type to Default:

Role A, where User Type = Admin and Export (action) = All

Role B, where User Type = Default and Export (action) = None

Then, the user can see all records in the module but cannot export data.

To create a role

In the Shortcuts menu of the Roles Home page, click **Create Role**.

ROLES: ? help

Save Cancel

Name:

Description:

Double click on a cell to change value.

	Access	Delete	Edit	Export	Import	List	View
Accounts	Default	Default	Default	Default	Default	Default	Default
Bug Tracker	Default	Default	Default	Default	Default	Default	Default
Calls	Default	Default	Default	Default	Default	Default	Default
Campaigns	Default	Default	Default	Default	Default	Default	Default
Cases	Default	Default	Default	Default	Default	Default	Default
Contacts	Default	Default	Default	Default	Default	Default	Default
Documents	Default	Default	Default	Default	Default	Default	Default
Email Marketing	Default	Default	Default	Default	Default	Default	Default
Emails	Default	Default	Default	Default	Default	Default	Default
Email Templates	Default	Default	Default	Default	Default	Default	Default
Leads	Default	Default	Default	Default	Default	Default	Default
Meetings	Default	Default	Default	Default	Default	Default	Default
Notes	Default	Default	Default	Default	Default	Default	Default
Opportunities	Default	Default	Default	Default	Default	Default	Default
Projects	Default	Default	Default	Default	Default	Default	Default
Project Tasks	Default	Default	Default	Default	Default	Default	Default
Target Lists	Default	Default	Default	Default	Default	Default	Default
Targets	Default	Default	Default	Default	Default	Default	Default

6. Enter a name and description for the role.

All the Sugar Suite modules along with the associated properties and actions are listed below in table format. You use this table to disable/enable modules or grant/deny permissions to perform specific actions.

7. To specify access to a module, double-click the **Access** field corresponding to that module, and from the drop-down list, select **Enabled**; to deny access to the module, select **Disabled**.
8. To specify end-user privileges, double-click the **User Type** field corresponding to the module and select **Normal**. To specify administrator privileges, select **Admin**.
9. To allow a specific privilege for a module, such as editing or deleting records, double-click the appropriate **Action** field corresponding to the module, and select one of the following:

All: allows all users of the specified user type to delete a record in the module.

Owner: allows only the record owner to delete the record.

None. Prevents all users of the specified user type from deleting records in the module.

Privileges are as follows:

- **Delete:** Delete records in the module. If None is selected, the Delete button is disabled on the detail page.
 - **Edit:** Edit records in the module. If None is selected, the Edit button is disabled on the detail page. Additionally, the user cannot use the Mass Update panel to update records for the module.
 - **Export:** Export record data in the module. The Export link located at the top of List views is removed when this privilege is not available to the user.
 - **Import:** Import record data in the module. The Import link in the navigation bar does not appear when this privilege is not available.
 - **List:** List views of records in the module. The user is unable to access the module's list view when this privilege is not available.
 - **View:** View records in the module. The user is unable to access the module detail view when this privilege is not available.
10. To create the role, click **Save**; click **Cancel** to exit the page without saving your changes.

Now, you need to assign users to the role.

To assign users to a role

1. On the Roles home page, click the name of a role to view associated access permissions in Sugar Suite.
2. Scroll down the page to view the Users sub-panel, and click **Select**.
3. Select users from the Users list and click **Select**.

The system assigns the selected users to the role.

You can also assign users to a role in the User Settings sub-panel of the User Management page.

To manage roles

1. To view the role details, click the role name on the Role home page.
2. To edit the role, on the detail page, click **Edit**, revise the information, and click **Save**.
3. To duplicate the role, on the detail page, click **Duplicate**, and then click **Save**.
4. To delete the role, on the detail page, click **Delete**.
5. To view access permissions for a specific user, in the Shortcuts menu, select List Roles by User and select the user from the adjacent drop-down list.
6. To remove a user, in the Users sub-panel, click the rem icon corresponding to the user name.

To view roles for a user

1. In the Shortcuts menu of the Roles home page, click **List Roles by User**.
2. Select the user from the drop-down list.

The system displays details of the user's privileges for each module. You cannot change any of the privileges because they are associated with the role.

Email

Use this sub-panel to manage outbound and inbound emails for your organization. You must configure the email settings to enable users to send out emails and campaigns (email and newsletter campaigns). Users can change some of these settings such as their email address and Email client on their My Account page. For more information on emails, see the *Sugar Open Source User Guide*.

Email Settings

Use this option to set the default settings for outbound and inbound emails.

For outbound emails, this includes the following:

- Default notification settings that specify the “From” name and address for notification emails that you send your users when you assign a record to them.
- The defaults for the Mail Transfer Agent, email format, and the email client for outbound emails.
- The number of mass campaign emails dispatched per batch, and the location of campaign tracking files.

You can also specify email settings for campaigns from the Campaigns module. For more information, see **“To configure email settings from the Campaigns module” on page 43**. For information on campaigns, see the *Sugar Open Source User Guide*.

By default, the system stores copies of the campaign email that was sent to each target in the Sugar database. As a result, the database contains duplicate copies of the same email. This not only takes up space but also slows down performance. To enhance performance, you now have the option of storing only one campaign email in the Sugar database. You can map this email to all the campaign targets instead of storing duplicate copies for each target. You can set this option when you configure the email settings as described later in this section. However, when you select this option, you will lose some information such as the timestamp. The target's detail page displays a list of emails sent to the target.

For inbound emails, you can specify the security settings to prevent compromising your system. You can select tags, such as applet and frame, that you want stripped from incoming emails. When you do this, the system checks incoming emails for the specified tags and removes them before displaying the email in the application. The email is stored in the Sugar database, so you can choose to preserve the raw email source in the database without stripping any of the specified tags. However, note this preserving the email source without stripping the tags may compromise your system.

To configure email settings from the Administration page

1. In the Email Settings sub-panel of the Administration page, click **Email Settings**.

1. In the Email Notification Options sub-panel, enter information for the following fields:

From Name. Enter the name of the sender.

From Address. Enter the sender's address.

Notifications on? Select this option to send an email notification to users when a record is assigned to them.

Send Notifications by default for new users? Select this option to send an email notification to new users when you create their record in the User Management page.

Send Notifications from assigning user's email address? Select this option to send notifications from the email address of the user when responding to an assigned task.

Mail Transfer Agent. From the drop-down list, select the Mail Transfer Agent for your outbound emails. You can select either Sendmail or SMTP.

2. In the User Email Defaults sub-panel, select the following information:

Compose email messages in this format: Select HTML email or Plain Text Email from the drop-down list.

Compose email using this client: The default is the SugarCRM mail client, but you can select an external mail client such as Microsoft Outlook.

Compose email messages in this character set: Select the appropriate character set from the drop-down list. The default character set is ISO-8859-1.

Delete related Notes & attachment files with deleted Emails: Select this box to delete notes and attachments that are related to the deleted emails.

3. In the Outbound Email Options sub-panel, specify the following information:

Save Outbound Raw Emails. If you want to save copies of outbound emails in the Sugar database, select **Yes**. By default, it is set to **No**.

Number of emails sent per batch. Enter the number of campaign emails you want to send out every batch.

Location of the campaign tracking files. Select either **Default** or **User Defined**. If you select **Default**, the system uses the value specified for the `site_url` parameter in the `config.php` file. If you select **User Defined**, you will need to specify the value in the field below.

Keep copies of campaign messages. By default, a copy of the campaign email that was sent to each target in the Sugar database. To store only one campaign email in the Sugar database and map it to all the campaign targets, select **No**. You can switch to back and forth between the two options when needed.

4. In the Email Security Settings sub-panel, specify the following information:

Preserve raw email source. Select this option if you want to preserve the email source in the database without stripping the selected tags.

Toggle all options. Check this box to strip all the listed tags from inbound emails. To strip some of the listed tags, you can uncheck this box and then select individual tags.

Outlook Defaults. Select this option if you do not want to strip the `Style` tag, which is used by Outlook.

5. To save your email settings, click **Save**; click **Cancel** to exit the page without saving your changes.

To configure email settings from the Campaigns module

1. In the Shortcuts menu of the Campaigns Home page, click **Email Setup**.

The Email Setup for Campaigns page displays.

2. In the Setup Email section, enter following information:

From Name. Enter the name of the sender.

Mail Transfer Agent. From the drop-down list, select either sendmail or SMTP as the protocol.

From Address. Enter the email address of the sender.

If you select SMPT, enter the following information:

SMTP Server. Enter the name of the SMTP server.

SMTP Port. Enter the SMTP port number.

SMTP Password. Enter the SMTP password.

Use SMTP Authentication. Select this box to use SMTP authentication.

SMTP Username. Enter the SMTP user name.

In the Email Notification Options section, enter the following information:

Number of emails sent per batch. Enter the maximum number of emails to send per batch.

Location of campaign tracking files. To specify where the campaign tracking files should be saved, choose **Allow Select** and enter the path to the location in the field below. To save it in the Web root directory on your local machine, choose **Auto-Create**.

Keep copies of campaign messages. To save a copy of campaign message in the Sugar database, select **Yes**. If not, select **No**.

3. Click **Next**.

The New Mail Box page displays.

1. Select the CREATE NEW MAILBOX box to create a mailbox to store bounced emails.
2. Enter the mailbox information as described in [“To set up a new mailbox for inbound emails” on page 47](#) and click **Next**.

The system displays a summary page that lists the specified settings.

3. Click **Save** to save the settings and create a bounce-handling inbox; to navigate back to the previous screen, click **Back**; to go back to the Campaigns Home page without saving any of the specified information, click **Cancel**.

Manage Email Queue

Use this option to view, send, and delete mass campaign emails that are in the queue for dispatch. The system sends out the email only after the start date/time has passed. After a campaign email has been processed, you can view its status in the Campaign module. The system tracks statistics such as the send date and number of times an email delivery was attempted.

Use the Scheduler to run nightly mass email campaigns as well as monitor bounced campaign emails. For more information on scheduling email mailings, see [“Scheduler” on page 13](#).

To manage queued emails

1. To send out campaign emails, select the campaign in the Queue sub-panel below and click **Send Queued Campaign Emails**.

You can select more than one campaign at a time.

2. To delete campaign emails, select the campaign in the Queue sub-panel below and click **Delete**; click **OK** to confirm the deletion.
3. To search for a specific campaign, enter the campaign name, or recipient name, or recipient address in the Search fields above and click **Search**; click **Clear** to clear the search fields.

Inbound Email

Use this option to monitor and manage emails that your organization receives. You can create inboxes, such as *support@example.com* or *sales@example.com*. The purpose of creating such inboxes is to allow a team of users to access emails that need action. For example, any member of the support team can access the Support inbox to take action on emails from customers.

For each mailbox, you can set up an action such as Create Bug and assign it to a specific group. A *group* is a bucket to collect and distribute emails to one or more teams. To create a group, you need to create a group user as described in [“Users” on page 33](#). If you do not assign a specific group to a new mailbox, the system automatically creates one for you.

When your organization receives emails that do not reference existing Sugar records, you can route them to a mailbox that is assigned to a specific group. You can parse these emails and associate them with the appropriate Sugar records. For example, you can associate an email with a case ID.

You or other users can subsequently distribute emails in the group mailbox to specific individuals. You have two options to distribute the email records: round-robin or least-busy. The system will assign the selected emails (using checkboxes or the search filter) as you specified. You can assign a single email or all emails by using the “Only Checked” and “All Search Results” options.

You can schedule a job to periodically monitor these mailboxes for new emails and distribute them. For more information on scheduling jobs, see [“Scheduler” on page 13](#).

If you run campaigns, you will need to create a bounce-handling inbox to collect campaign emails that bounce back to you.

When you click the Inbound Email option on the Administration Home page, the following screen displays.

The Case Macro field links an email with a specific case number. When users send an email from the detail page of a case, the case number appears in the Subject field of the email. To customize the subject line, you can replace “CASE” with any text of your choice.

To preserve the raw email source in the database without stripping any of the specified tags, select **Yes** for the Save Raw Source option. For more information, see “[Email Settings](#)” on page 41.

To set up a new mailbox for inbound emails

1. In the Shortcuts menu of the Inbound Email home page, click **Monitor New Mailbox**.

2. In the Basic Setup sub-panel, enter information for the following fields:

Name. Enter the user’s name, or an alternate name for the mailbox.

Mail Server Address. Enter the address of the mail server.

Mail Server Protocol. From the drop-down list, select either IMAP or POP3.

Mail Server Port. Enter the server port number.

Status. From the drop-down list, select the user status.

User Name. Enter the user name.

Password. Enter the user password.

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

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

Note: If using POP3, clear out the mailbox regularly, otherwise, you may experience performance issues as the mailbox gets full.

Import only since last check. If you are using POP3, select this box to instruct the system to import only email messages that are new since the last time you checked for messages.

- In the Email Handling Options sub-panel, enter information for the following fields:

Possible Actions. From the drop-down list, specify the action that the team is permitted to perform. To permit all actions, select Create [Any].

To create an inbox to handle bounced campaign emails, select Bounce Handling. You can create a bounce-handling inbox separately for each campaign or you can create one that is common to all campaigns. The system tags every bounced campaign email with a unique identifier that enables you to identify the campaign.

Assign To Group. From the drop-down list, select an existing email group or elect to create a group when you save the inbox.

Auto-Reply Template. From the drop-down list, select an existing email template.

“From” Name. Enter the name of the user who is sending out the email.

“From” Address. Enter the email address of the user.

No Auto-reply to Domain. To exclude a domain from receiving the automatic email response, enter the domain name.

It is common to specify your organization’s domain to prevent auto-replies from being sent to your organization’s members.

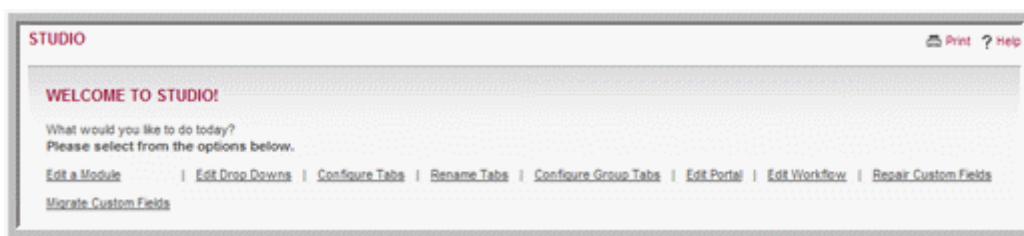
To manage monitored mailboxes

- To view a mailbox’s details, click its name in the Inbound Email home page.
- To edit the mailbox details, on the detail page, click **Edit**, revise the information, and click **Save**.
- To duplicate the mailbox, on the detail page, click **Duplicate**.
- To delete the mailbox, click **Delete**; to delete multiple mailboxes, select them on the Inbound Email home page and click **Delete**.

Studio

This section describes the various settings associated with the user interface such as field layout, editing, tab configuration, and workflow management.

The Studio editor enables you to edit drop-down lists, custom fields, layouts, and labels in Sugar Suite modules.



You can select from the following options:

Edit a Module. Select this option to reconfigure a specific module.

Edit Drop Downs. Select this option to edit or create a drop-down list.

Configure Tabs. Select this option to hide a tab or to display a hidden tab.

Rename Tabs. Select this option to rename a module tab.

Configure Group Tabs. Select this option to group module tabs in the user interface instead of displaying them individually.

Edit Portal. Select this option to create and manage a portal site.

Repair Custom Fields. Select this option to repair custom fields.

Migrate Custom Fields. Select this option to import and export custom field definitions from or to a Sugar file.

Users can use their My Account page to override some of the configurations that the administrator makes in Studio. For more information, see “Setting Your Preferences” in the *Sugar Enterprise User Guide* or the *Sugar Professional User Guide*.

Editing a Module

You can edit a module’s layout, drop-down lists, custom fields, or history. The process of editing a module is as follows:

1. Click **Edit a Module** and select a module.
2. Select the action that you want to take. You can choose from the following:

Edit Layout: Select this option to rearrange the fields and panels on the screens available in detail view or edit view. For more information, see [“Editing the Layout” on page 49](#).

Edit Custom Fields: Select this option to edit and create a custom field. You can also clean the custom field cache. For more information, see [“To add custom fields” on page 51](#).

Edit Drop Downs: Select this option to edit and create drop-down lists. For more information, see [“Creating and Managing Drop-down Lists” on page 52](#).

Edit Labels: Select this option to edit field labels for a module. For more information, see [“Editing Field Labels” on page 54](#).

Editing the Layout

You can rearrange the fields and panels on the pages available within Sugar Suite, to customize them to fit your needs.

Begin by selecting the name of the file to customize. This can be a specific view from one of the system’s modules, such as the detail view or the edit view. When you select a view, its field layout displays. You can click and drag a field to a different location within the layout.

The Shortcuts menu displays options to navigate back to the Studio wizard or to continue with the last task you performed using the wizard.

Below the Shortcuts menu, a Toolbox menu provides a workspace to add new fields and labels to a screen, to temporarily hold records that have been removed from a screen, and to discard records which are not needed.

The buttons above the page layout provide options to add custom fields or additional rows to existing fields. You can also undo revisions or redo revisions as needed. You can also view the revision history, preview the specific revision and compare it with the current layout. You can restore or delete a previous revision, if necessary.

To edit the field layout

1. Select Edit Layout.
2. From the Layouts options, select the file that you want to edit. Choose EditView to revise the edit view; choose DetailView to revise the detail view; choose ListView to revise the list view.

It is recommended that you edit these layouts only through Studio.

3. The EditView page is shown below. To edit a field name, click within the field, select its name, and enter the new name.
4. To move a field to a different location, point your cursor at the field name, hold down the mouse button, and drag it to the desired location on the page.
5. To add a custom field, click the **Add Custom Field** button and follow the process described in [“To add custom fields” on page 51](#).
6. To add additional fields, click the **Add Rows** button.
7. To delete a field, drag it to the trash can in the Toolbox located below the Shortcuts menu.
8. To remove a field, drag it to the Sugar Fields staging area in the Toolbox.
9. To view fields of a specific type, select the type from the drop-down list in the Toolbox and view the fields below the drop-down list.
10. To revert to the previous revision, click **Undo**.
11. To redo the revision, click **Redo**.
12. To save your changes, click **Save**.
13. To save and publish the new layout, click **Save & Publish**.
14. To view a previous version, click **History**.

For more information on viewing and managing versions, see [“Viewing and Managing Revisions” on page 54](#).

Creating and Managing Custom Fields

You can add custom fields to any module in Sugar Suite. When you add a custom field, the application adds the field to the appropriate database table and stores the generated metadata.

First, select the module in which you want to add or edit custom fields. Then you can define the field properties. After creating a new field, you can edit its properties, and repair it if necessary.

Exporting Custom Fields. You can migrate custom fields from one server to another. Before importing a new custom field structure, it is recommended that you export the current custom field structure as a backup. When you import a custom field structure,

details display to describe what changes is made to the database. If you agree with the changes, click the **Execute non-simulation mode** link. Importing removes any previously defined custom field structures that are not defined in the imported Sugar file as well as any data stored in those custom fields. If you want to revert the import process, import the backup version of the structure you exported.

To add custom fields

1. To add a new custom field, select Edit Custom Fields on the Edit a Module page.
2. Select Create Custom Field. Alternatively, on the Edit Layout page, click the **Add Custom Field** button.

A new window displays.

3. Enter values for the following:

Data Type. From the drop-down list, select the data type such as Text, Email, or DropDown.

Field Name. Enter the field name that is stored in the database.

Field Label. Enter a field name that displays in the Sugar Suite user interface.

Help Text. Enter descriptive text for the field. This text displays when the user points the cursor at the field.

Default Value. Enter a default value for the field, if necessary.

Max Size. Enter the maximum number of characters that the field can contain.

Required Field. Check this box to specify that users must enter a value for the field.

Audit? Check this box to display field values when a user clicks the View Audit Log link.

Duplicate Merge. From the drop-down list, specify whether the functionality to merge duplicate records has been disabled, enabled, in filter, or default selected filter.

4. Click **Save** to create the field.

To edit custom fields

1. In the Studio wizard, select Edit a Module and then select the module.
2. Select Edit Custom Fields.
3. Select View Custom Fields.
4. Select the field from the list.

The Custom Field Editor displays the field properties.

5. Make the necessary changes and click **Save**.

To clear custom field cache

1. In the Studio wizard, select Edit a Module and then select the module.
2. Select Edit Custom Fields.
3. On the Custom Field Editor page, select Clear Cache.

The system clears the custom field cache.

Creating and Managing Drop-down Lists

Every module displays at least one drop-down list consisting of several values that users can choose from. For example, when users creates an account, they can choose a specific industry type and an account type from their respective drop-down lists.

As the administrator, you can create and edit values in all of the drop-down boxes in the system to suit your organization's needs. You can also create new drop-down lists.

To create a drop-down list

1. In the Studio wizard, select Edit Drop Downs.
2. On the Drop Down Editor page, select Create a Drop Down.

The fields to create a new drop-down list display below.

3. Enter values for the following fields:

Dropdown Name. Enter a name for the drop-down list.

Dropdown Language. Select the language to display the list. The languages that are available to you depends on the language packs that you installed.

Database Value. Enter the database value that you are mapping to the drop-down list value.

Display Value. Enter the value that you want to display in the drop-down list.

4. To create a new mapping, click the + button.
5. To remove a mapping, click the Delete icon.
6. To edit a mapping, click the Edit icon.
7. To undo a previous action, click **Undo**.
8. To repeat the previous action, click **Redo**.
9. To save the value, click **Save**.

To manage a drop-down list

1. On the Drop Down Editor page, select Edit Dropdowns.

The system displays the mapping between the database keys and drop-down list values for that module.

2. To edit a value, click the corresponding Edit icon in the Display Value column and make your changes.
3. To add a new value, in the fields below enter the database key and the corresponding value, and click the + button.
4. To undo a previous action, click **Undo**.
5. To repeat the previous action, click **Redo**.
6. To save your changes, click **Save**.

Editing Field Labels

Every field in a module has a name. You can change these names as needed. You can do this for all language packs that you have installed.

To change field labels

1. Click Edit Labels.

A list of existing database fields and the field names to which they are mapped displays on the page.

Field Name	Label
LBL_MODULE_NAME	Accounts
LBL_MODULE_TITLE	Accounts: Home
LBL_HOMEPAGE_TITLE	My Accounts
LBL_SEARCH_FORM_TITLE	Account Search
LBL_LIST_FORM_TITLE	Account List
LBL_VIEW_FORM_TITLE	Account View
LBL_NEW_FORM_TITLE	New Account
LBL_MEMBER_ORG_FORM_TITLE	Member Organizations
LBL_BUG_FORM_TITLE	Accounts
LBL_LIST_ACCOUNT_NAME	Account Name
LBL_LIST_CITY	City
LBL_LIST_WEBSITE	Website
LBL_LIST_STATE	State

2. If you have installed other language packs, select the appropriate one from the Language drop-down list.
3. Select the label that you want to edit and enter the new name.
4. Click **Save**.

Viewing and Managing Revisions

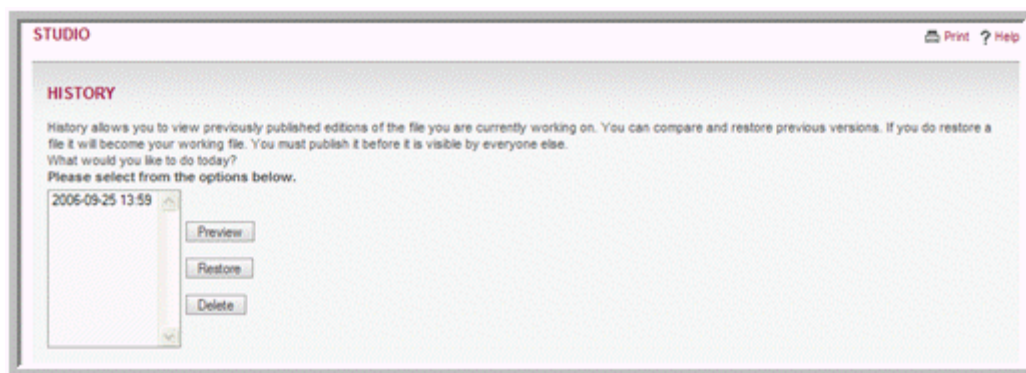
After you save and publish the changes you make to a module in Studio, you can view the revision history to perform any of the following actions:

- Preview the changes you made
- Compare the current version to the previous version
- Restore the previous version
- Delete the new version that you created.

To view and manage revisions

1. Click History and click **OK** to confirm your action.
2. On the History page, select a date to view changes made in that particular revision.

The following screenshot displays the timestamps when changes were made to the Edit view of the Accounts module.



3. To preview a change, select the timestamp and click **Preview**.
When you click preview, the revised page displays below.
4. To compare the changes with a previous version of the page, select the appropriate timestamp and click **Compare**.
5. The following screenshot displays differences in field placements in the Accounts Edit View. To restore a version, select the appropriate timestamp and click **Restore**; to delete a change, select the timestamp and click **Delete**

Configuring Module Tabs

By default, all the module tabs are displayed when a user logs into Sugar Suite. However, you can choose which module tabs to display when users log into Sugar Suite. You can also choose the order in which these tabs are arranged in the Sugar Suite user interface.

By default, users can also configure module tabs on their My Account page. However, the user cannot add back module tabs that the administrator removed from the system. Administrators can unselect the Allow users to configure tabs check box if they do not want users to make any changes.

Note: You cannot hide the Home tab.

To configure module tabs

1. In Studio, select Configure Tabs.
The Configure Tabs page displays all the tabs in the Display Tabs list.
2. To hide a tab, select it in the Display Tabs column and, using the Right arrow (>) button, move it to the Hide Tabs column.
3. To rearrange the order in which the tabs are displayed, use the Up and Down arrows.
4. To disallow users from configuring the tabs, deselect the Allow users to configure tabs option.

5. Click **Save** to save the configuration; click **Cancel** to exit the page without saving your changes.

Renaming Tabs

You can rename the module tabs that display in Sugar Suite.

To rename tabs

1. In Studio, select **Rename Tabs**.

The tab labels and the corresponding database table keys display. From the three drop-down lists displayed above the tab labels, you can select the module, a corresponding drop-down list, and the language to display the tab.
2. To view all the available drop-down lists in the system, select **All** from the drop-down list above the **Database Key** column, and select a list from the adjacent drop-down list.

To view a drop-down list that is specific to a module, select the module from the drop-down list above the **Database Key** column and then select one of the related lists from the adjacent drop-down list.
3. Click the label that you want to edit and replace it with the new value.
4. Click **Save** to save your changes; click **Undo** to revert to the previous value; click **Redo** to go back to your change.

Configuring Group Tabs

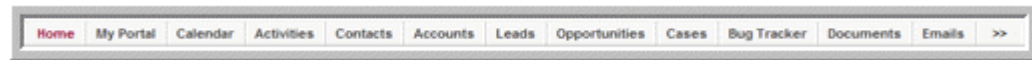
By default, the system displays individual module tabs when users log into Sugar Suite. However, you can use the **Configure Group Tab** option to organize these individual tabs under group tabs. For example, you can group contacts, leads, and opportunities under Sales and cases, bug tracker, and products under Support. You can add the same module to multiple group tabs. For example, Contacts can be part of Sales as well as Marketing. When users click a group tab, they can access the module tabs associated with it.

Note: Only the Sugar theme supports the **Configure Group Tab** option.

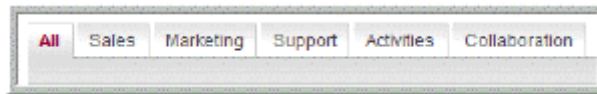
By default, the system provides following group tabs:

- Home
- Sales
- Marketing
- Support
- Activities
- Collaboration
- Tools

The following screenshot illustrates individual module tabs.



The following screenshot illustrates group tabs and the module tabs grouped under the Sales group tab.



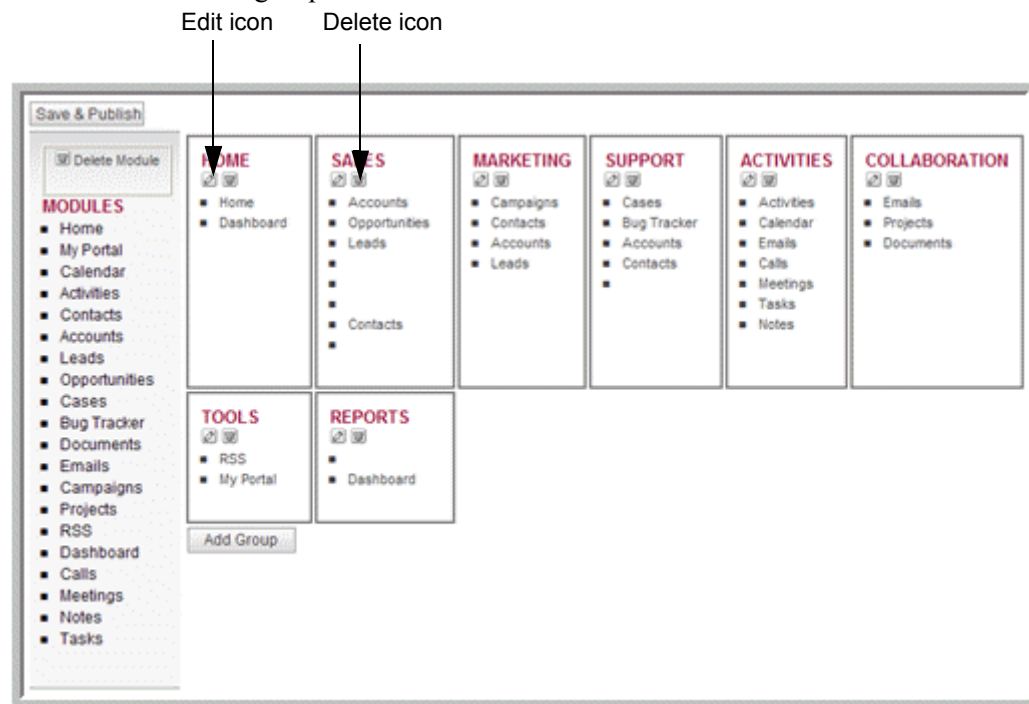
You can change the labels for any of these tabs and also add new group tabs, if needed.

Users have the ability to change to grouped tab or ungrouped tab configuration on their My Account page.

To configure and manage group tabs

1. In Studio, click **Configure Group Tabs**.

The default group tabs display on the page. The associated module tabs are listed below each group tab



2. To edit the name of a group tab, click the Edit icon, enter the new name in the text field, and click **Save**.

The group tab displays the new name.

3. To remove a module tab from a group tab, place the cursor on the name and drag it to the Delete Module box on the left.

The module no longer displays under the group tab.

4. To add a module to a group tab, select it from the **Modules** list on the left, drag it, and place it just below the **Edit** and **Delete** icons.

Under a group tab, you can rearrange the order of the module tabs by selecting a tab name and dragging it to a different location in the list.

5. To undo your last action, click **Undo**.
6. To repeat your last action after you undo it, click **Redo**.
7. To save your changes, click **Save**.

To add a new group tab

1. Click **Add Group**.
A **New Group** box displays on the page.
2. To name the new group tab, click the **Edit** icon, enter the name in the text field, and click **Save**.
3. To add a module tab under the new group tab, select it from the **Modules** list and drop it below the **Edit** and **Delete** icons.
4. Click **Save**.

The new group tab displays on the page.

Creating and Managing Portals

Adding portal sites in Sugar Suite enables the system to provide a single interface for multiple applications and Web sites. You can add new module tabs that can link to any Website you choose, thus enabling Sugar Suite to become a single interface focus for its users. This is commonly used to include emails, forums, or other Web-based applications.

A portal site can be either of two types: Personal or Global. While both administrators and users can create portals, there are some differences that are noted below:

- Users can only create personal portals that are not shared with other users, while administrators can create both personal and global portals. Global portals can be viewed by all users in the organization.
- Users can display portal sites only in the Shortcuts menu, but administrators can display portals as a tab and in the Shortcuts menu.
- Any personal portal that a user creates is listed on the administrator's Portal Home page, but an administrator's personal portal is not listed on users' Portal Home page.

For information on creating a portal, see *Sugar Open Source User Guide*.

Repairing Custom Fields

Sometimes, the metadata of a custom field may not be synchronized with the fields in the Sugar database table. As a result, the custom field may not function correctly in Sugar Suite. In such cases, you need to repair the field to synchronize its metadata with the database field. When you use the Repair Custom Field option, the system checks all the custom fields and repairs the ones that need to be corrected.

To repair a custom field

1. In Studio, click **Repair Custom Field**.

If any of the custom fields need to be repaired, the system displays a list of custom fields that need to be repaired, similar to the screen show below:



2. Click **Execute non-simulation mode** to repair the fields.

Migrating Custom Fields

When customizing Sugar Suite, typically you would create custom fields in your staging environment, edit the module layout to display the new fields in the application, and test it before moving it to your production environment.

When migrating a custom field, you need to move its details such as the name, label, and ID as well as any changes that you make to the module's layout in the application. The custom field details are stored in the Sugar database. The layout format is saved as an HTML file in the application's build. Depending on where you make the changes, you may need to update the module's Detail view and the Edit view.

You must export the custom fields from the staging environment to your local machine and then import them from your machine into the production environment. You can then copy the updated layout HTML files from the staging area to the production area.

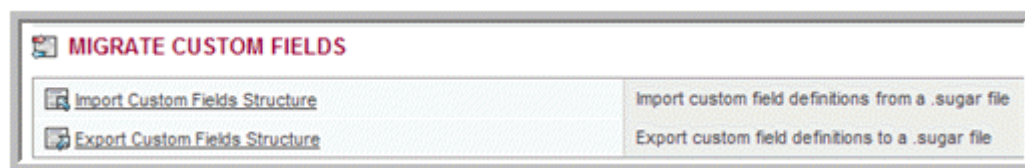
For information on creating custom fields, see [“Creating and Managing Custom Fields” on page 50](#).

For information on editing a layout, see [“Editing the Layout” on page 49](#).

To import custom fields into the Sugar database

1. In Studio, click **Migrate Custom Fields**.

The Migrate Custom Fields page displays.

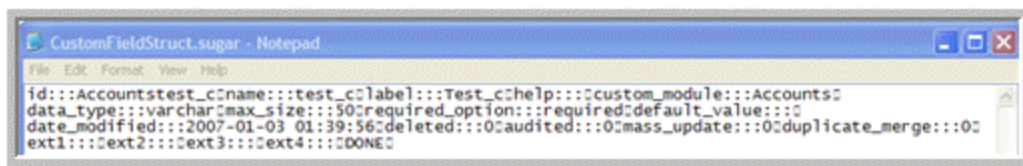


2. Click **Import Custom Fields Structure**.
3. Click **Browse** to navigate to the location of the export file on your local machine. The selected file displays in the Custom Field structure field.
4. Click **Import Structure**.

The system imports the information and displays the number of custom fields that were imported.

To export custom fields from the Sugar database

1. In Studio, click **Migrate Custom Fields**.
The Migrate Custom Fields page displays.
2. Click **Export Custom Fields Structure**.
The system create a sugar document named *CustomFieldStruct.sugar* and the File Download dialog box displays.
3. To save the file to your local machine, click **Save** and navigate to the location where you want to save it.
The system displays the Download complete dialog box after it saves the file to the specified location.
4. To open the file, click **Open**; to open the folder where the file is located, click **Open Folder**.
The example below displays a custom field named *test*.



To copy the module layout file

1. In the staging area, navigate to `main/modules/ModuleName` where **ModuleName** is the name of the module that you edited.
2. Copy the *DetailView.html* or the *EditView.html* file that you edited.
3. In the production area, navigate to `main/modules/ModuleName` and paste the HTML file to overwrite the existing one.

Bug Tracker

Use this sub-panel to maintain a list of releases for your product. This list will be available in the Release drop-down box that is displayed when reporting a new bug in the Bug Tracker module.

To create a release

1. On the Administration Home page, click **Releases** in the Bug Tracker sub-panel.

2. On the Releases Home page, click **Create**.

The screenshot shows the 'RELEASES: HOME' interface. At the top, there's a 'RELEASE LIST' section with a 'Create' button. Below it is a table with columns for 'Release', 'Status', and 'Order'. The table contains two entries: '1.0' with 'Active' status and order '1', and '2.0' with 'Active' status and order '2'. Below the table is a 'RELEASE: 2.0' sub-panel with a 'Save' button and a 'Save & Create New' button. The sub-panel has three fields: 'Release version' with the value '2.0', 'Status' with a dropdown menu set to 'Active', and 'Order' with the value '2'. Each field has a small asterisk and a tooltip explaining its function.

Release	Status	Order	
1.0	Active	1	del
2.0	Active	2	del

RELEASE: 2.0

Save Save & Create New

Release version: * 2.0

Status: * Active Set status to inactive to remove this release from the Release dropdown lists

Order: * 2 Set the order this release will appear in the Release dropdown lists

3. In the Release sub-panel that displays below the list, enter information for the following fields:
 - Release Version.** Enter the version number of the release.
 - Status.** From the drop-down list, select **Active** to display the name in the Release drop-down list.
 - Order.** Enter a number to specify the order in which the release is displayed in the drop-down list.
4. To add the release to the list, click **Save**.
5. To add another release to the list, click **Save and Create New**.

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