Sugar Community Preview Guide

Community Edition

Version 5.0 Beta 1

Sugar Community Preview-Community Edition
Version 5.0 Beta 1, 2007

www.sugarcrm.com

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Overview

Welcome and thank you for participating in the SugarCRM Community Preview process.

This document describes the release of Sugar 5.0 Beta1 for the Community Preview scheduled to begin in August.

The URL of the Community Preview version of Sugar Suite 5.0 Beta1 is:

https://www.sugarcrm.com/crm/Sugar5.0_Beta1_CP

This preview site is accessible to all preview participants and thus is a shared site. Accordingly, do not store any confidential data on this site. Also, SugarCRM periodically refreshes the data on the site so changes you make will be erased.

We will work as quickly as possible to incorporate your feedback into the development process.

You can provide feedback in two ways:

- Via the SugarCRM Bug Portal.
- Via a private forum called "Community Preview" at http://forums.sugarcrm.com.

The SugarCRM Development Team will be closely monitoring these channels as the process is underway.

Please review the Known Issues list, which is provided later in this document prior to submitting bugs. You can provide feedback through the SugarCRM Bug Portal, accessible through http://bugs.sugarcrm.com. Use "5.0 Beta 1" to designate new bugs found in this release.

You can log in to the Community Preview version by using the logins available on Sugar demo systems:

The users (and passwords) in demo data for Sugar Suite are as follows:

jim/jim (User "jim" with password of "jim" (no quotes).

chris/chris

max/max

sally/sally

sarah/sarah

will/will

New and Enhanced Features in 5.0

Sugar 5.0 has implemented many enhancements to improve the performance of the application. Sugar 5.0 has adopted a metadata driven User Interface and a Model View Controller architecture. In addition, it has deeper business logic hooks and a Module loader activation framework. The installation process has also been improved to make it easier to install the application.

New and enhanced features in Sugar 5.0 are as follows:

- A redesigned Emails module with AJAX based email client .
- A redesigned Studio with an enhanced User Interface.
- A Module Builder to build custom modules quickly and efficiently.

Using the Redesigned Emails Module

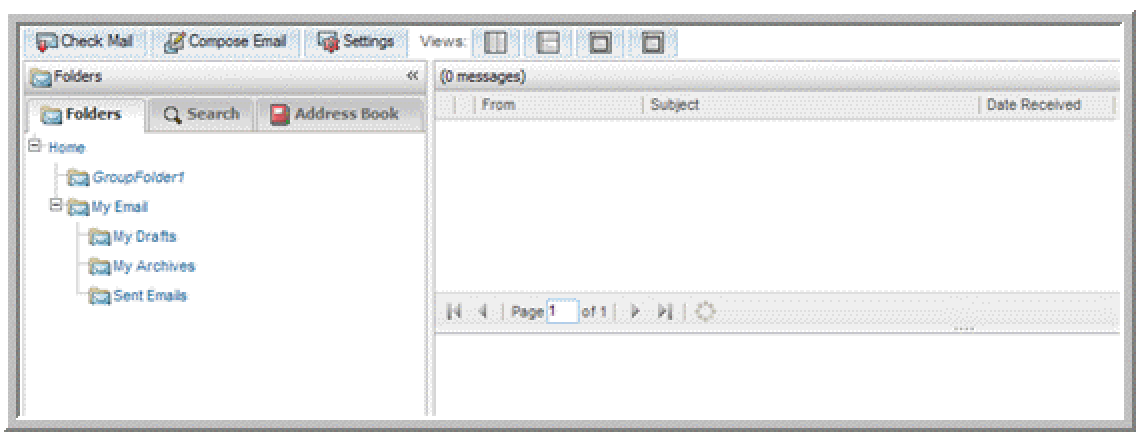
You can use the new Emails module as an email client to manage your inbound and outbound emails. Sugar supports POP3 and IMAP protocols. Using either of these protocols, you can view and manage your external email accounts through Sugar. You can send the emails that you compose in Sugar through any of your external email accounts. The IMAP protocol retains the folder structure of the email server.

Apart from functioning as an email client, the Emails module now offers the following features:

- Ability to create Group folders to route emails for distribution.
- A default personal folder named My Emails. You can create additional personal folders.
- An address book that you can populate with entries from your list of users, contacts, and leads.
- Ability to create records such as bugs and leads from inbound emails.

The default layout of the Emails module divides the page into three panels: the left panel displays the folders, address book, and search tabs; the top-middle panel lists email messages in the inbox, and the bottom-middle panel displays the contents of the email when you select the email from the list above.

The top of the page displays options to check for incoming emails, compose emails, configure email settings, and change the page layout

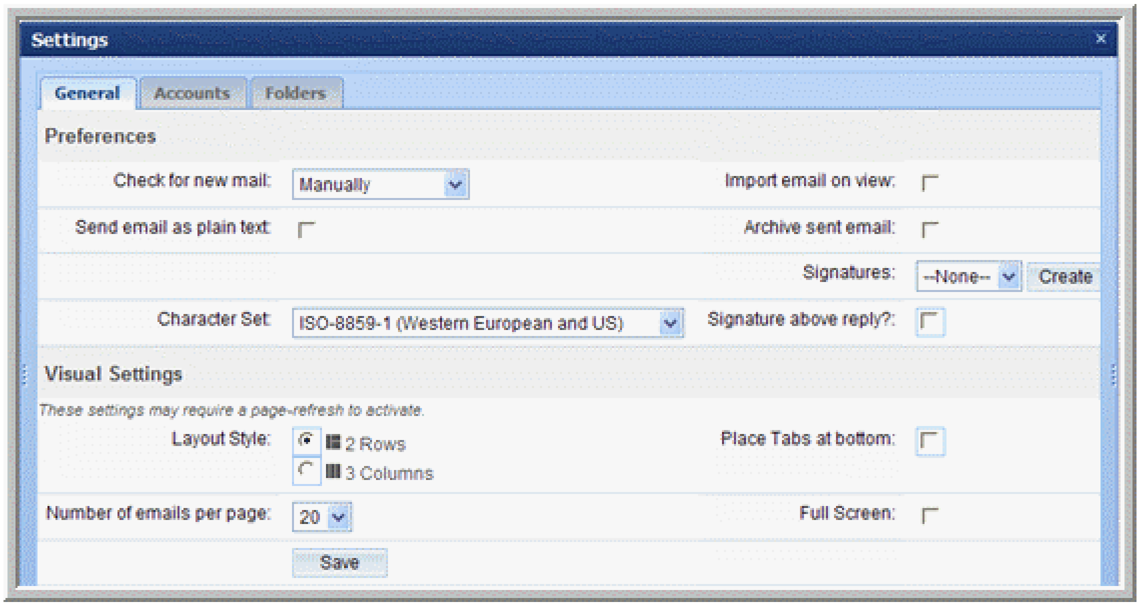


Email Settings

General: General settings include options such as the email layout style, importing emails, and archiving emails. General settings apply to all your email accounts in Sugar.

To specify general settings

Click **Settings** at the bottom of the page

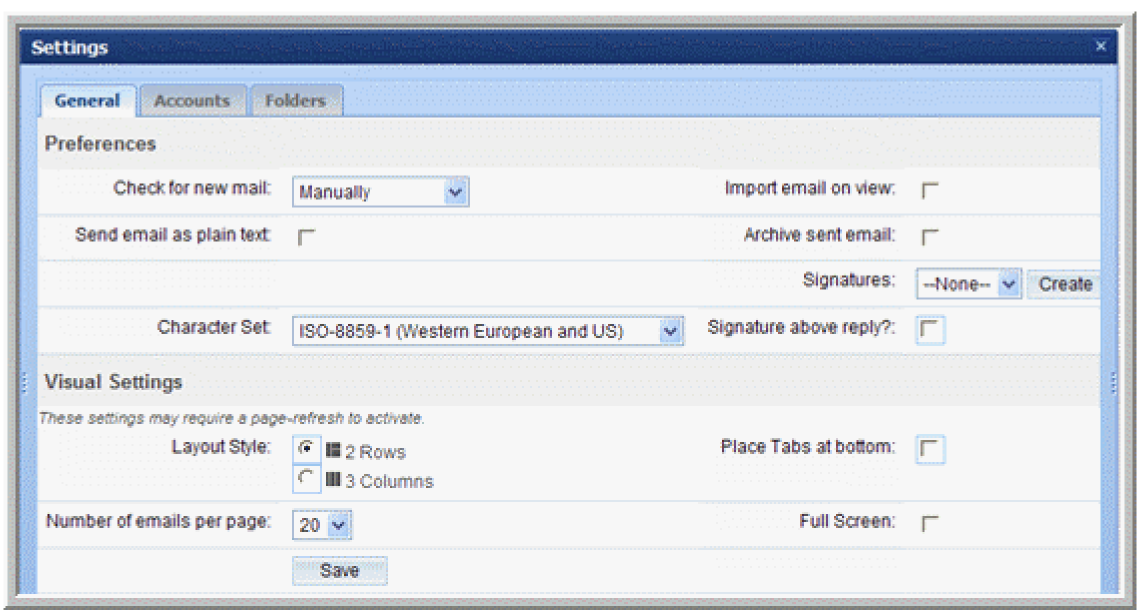


Accounts: You will need to set up an account in Sugar for every external email account that you want to access through Sugar. You must set up at least one email account in Sugar to be able to send and receive emails. For outbound emails, you can select SendMail or you can add a different mail server.

To set up an email account

1. Click **Settings** at the bottom of the page.

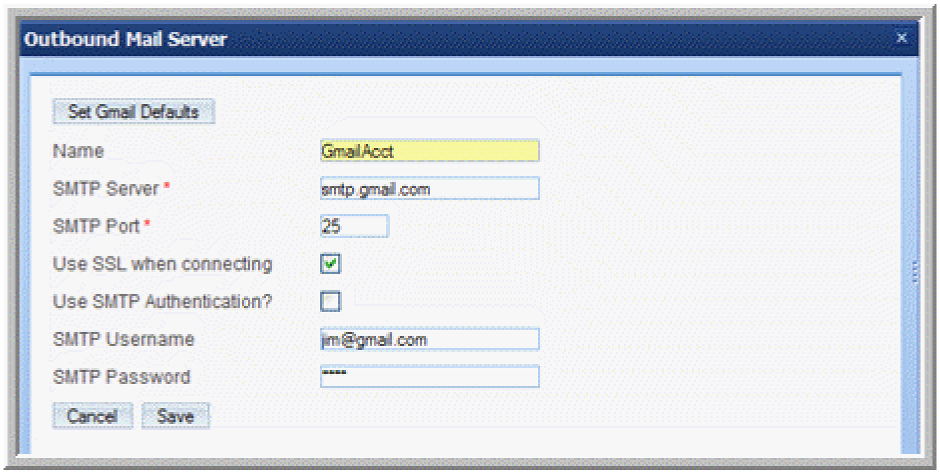
Select the Accounts tab.



2. Enter information such as account name, user name and password. In the Mail Server Address field, enter information for incoming emails. In the Outgoing Mail Server field, you can select SendMail or add a new email server.

To add a mail server for outbound emails

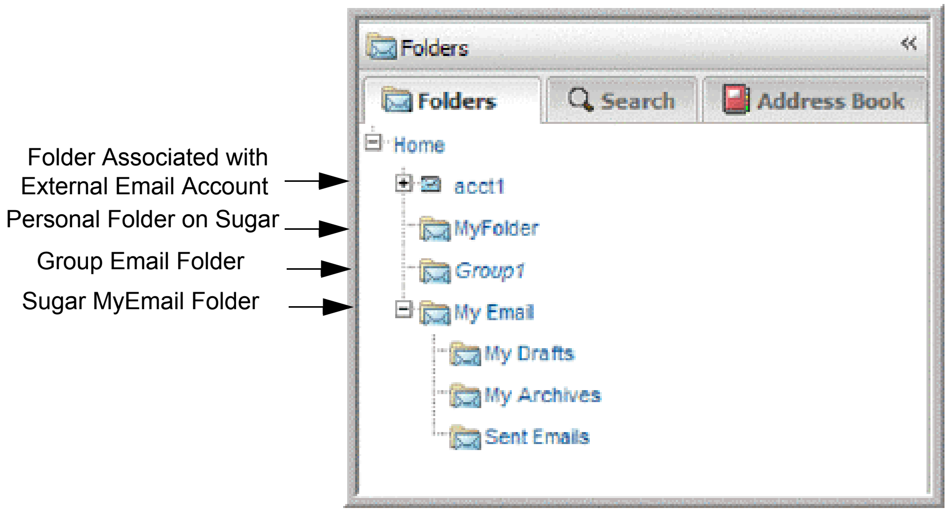
1. Select Add Server from the Outgoing Mail Server drop-down list.
2. Enter information in the Outbound Mail Server window.



Folders: Email folders are of the following types:

- Folders for external email accounts. Sugar automatically creates a folder for every email account that you configure. Emails in this folder reside on the mail server associated with that account. If you have multiple email accounts, the system creates a folder for each one.
- Folders for emails that you archive in Sugar. This includes the following:
  - *My Email* folder, which Sugar provides for you.
  - *Group* folders for emails that need to be distributed among users within your organization. Only administrators can create Group folders.

- *User* folders that you create to store emails that you move, copy, or archive from your external email accounts.

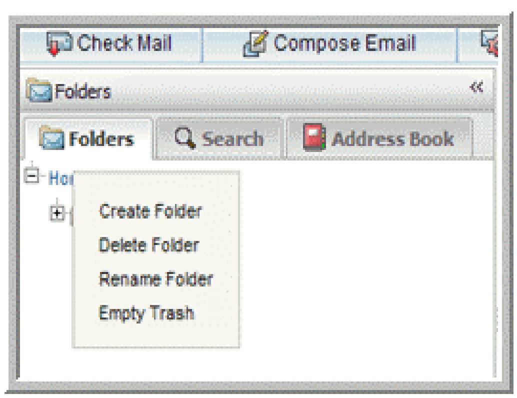


You create Group folders in the Folders tab of the Settings window and User folders in the Folders tab of the Emails module home page. You can view both Group folders and User folders in the Folders tab of the Email Settings page as well as in the left panel of the Emails module.

You can hide a folder by deselecting it on the Folders tab of the Email Settings window.

To create a User folder

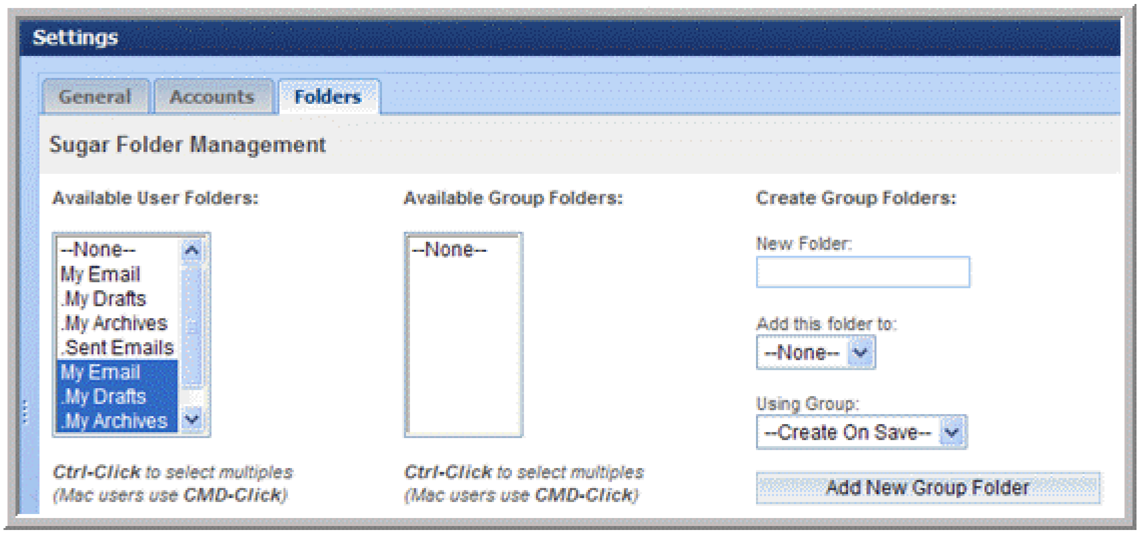
1. On the Folders tab of the Emails module home page, right-click Home or My Email and select **Create Folder**.



To create a Group folder

1. Log into Sugar as an administrator.
2. Click **Settings** at the bottom of the page.

Select the **Folders** tab and enter information in the Create Group Folders section.



Creating Emails

When you compose an email, you can choose the email account from which to send the email. The system uses the email settings that you specify as the default in the General tab of the Email Settings page. These settings include the signature, team assignment, and email archival options. However, when you compose an email, you can change some of these options by clicking the Options link. You can also specify additional options such as email templates or a different character set.

To create an email

1. Click **Compose Email**.

Managing Inbound Emails

After you view an email in your inbox, you can take actions such as archiving the email, creating a record such as a bug or a lead, viewing the header, and viewing the raw email text.

To archive the email, click **Import to Sugar**.

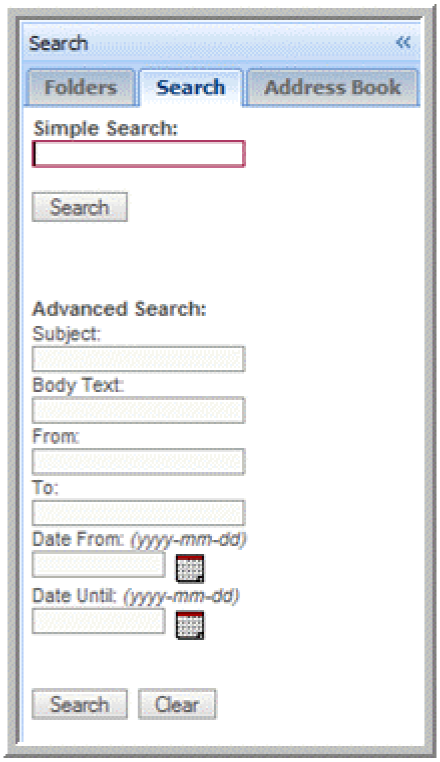
To create a record such as a bug or a case, click **Quick Create**, and select the record type from the drop-down list.

Searching for Emails

You can search for emails based on keywords or parameters such as the subject line.

To search for emails

1. Click the **Search** tab in the left pane.

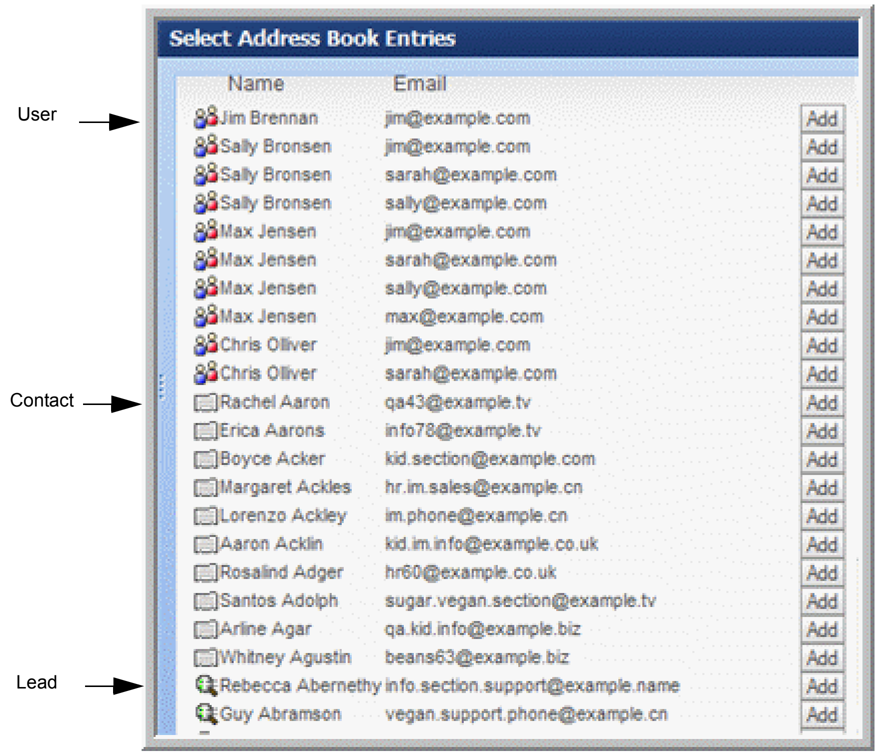


Creating an Email Address Book

You can populate the email address book with the email addresses of individuals with whom you frequently correspond. You can select individuals from your list of contacts, leads, users, and targets.

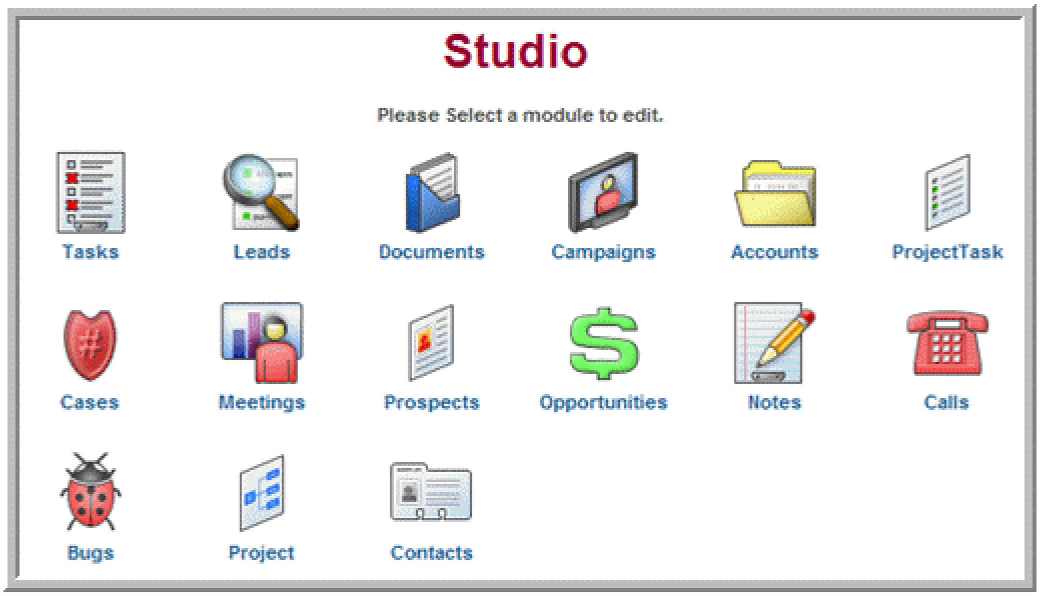
To add entries to the address book

1. In the left panel of the Emails home page, select the Address Book tab.
2. Click **Select** to view the list of available individuals and click **Add** to select an entry for the address book.


User
Contact
Lead
Select Address Book Entries
Name
Email
Jim Brennan jim@example.com Add
Sally Bronsen jim@example.com Add
Sally Bronsen sarah@example.com Add
Sally Bronsen sally@example.com Add
Max Jensen jim@example.com Add
Max Jensen sarah@example.com Add
Max Jensen sally@example.com Add
Max Jensen max@example.com Add
Chris Olliver jim@example.com Add
Chris Olliver sarah@example.com Add
Rachel Aaron qa43@example.tv Add
Erica Aarons info78@example.tv Add
Boyce Acker kid.section@example.com Add
Margaret Ackles hr.im.sales@example.cn Add
Lorenzo Ackley im.phone@example.cn Add
Aaron Acklin kid.im.info@example.co.uk Add
Rosalind Adger hr60@example.co.uk Add
Santos Adolph sugar.vegan.section@example.tv Add
Arline Agar qa.kid.info@example.biz Add
Whitney Agustin beans63@example.biz Add
Rebecca Abernethy info.section.support@example.name Add
Guy Abramson vegan.support.phone@example.cn Add

Using the Redesigned Studio

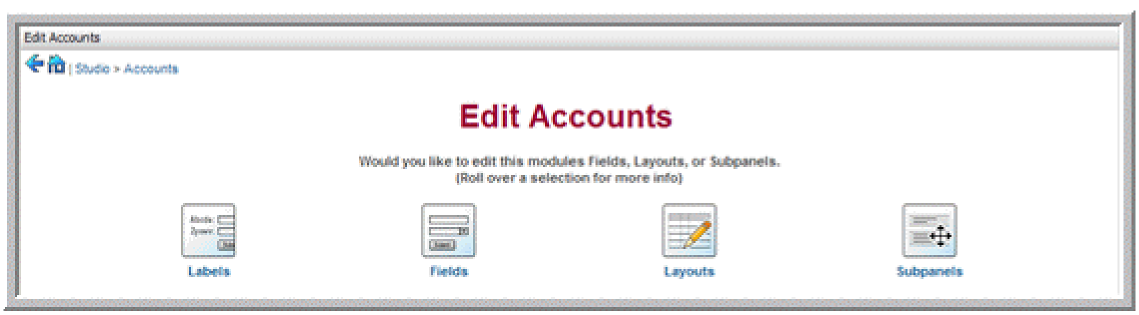
The Studio User Interface has been redesigned to enhance user experience. The Studio editor enables you to customize modules by adding new fields, editing existing fields, the layout, field labels, and sub-panels.



To edit a module

1. Click the appropriate icon for the module that you want to edit.
2. Click the appropriate icon to edit label names, create custom fields, change the layout of ListView, EditView, and DetailView, and edit sub-panels. Use the Back button to navigate backwards and forwards.

   The screen below displays the Edit Accounts page.



Building Modules with the Module Builder

The Module Builder is a new feature that enables you to create and edit custom modules.

The process of building a module is as follows:

1. Create a package to house the new modules.
2. Create the new module. You can create one or more modules for the package.

3. Publish the package when you want to make it available to other users in your organization. You will need to load the Zip file containing the package using Module Loader

If you need to add or remove fields after you publish the module, you can do so through Studio.

The Module Builder provides the following module templates that you can use to create custom modules:

Basic. This template provides basic fields such as ID, date entered, and created by. Use this template to create a module from scratch.

Company. This template provides organization-specific fields such as company name, industry, and billing address. Use this template to create a module that is similar to the Accounts module.

Person. This template provides individual-specific fields such as salutation, title, name, address, and phone number. Use this template to create a module that is similar to the Contacts or Leads module.

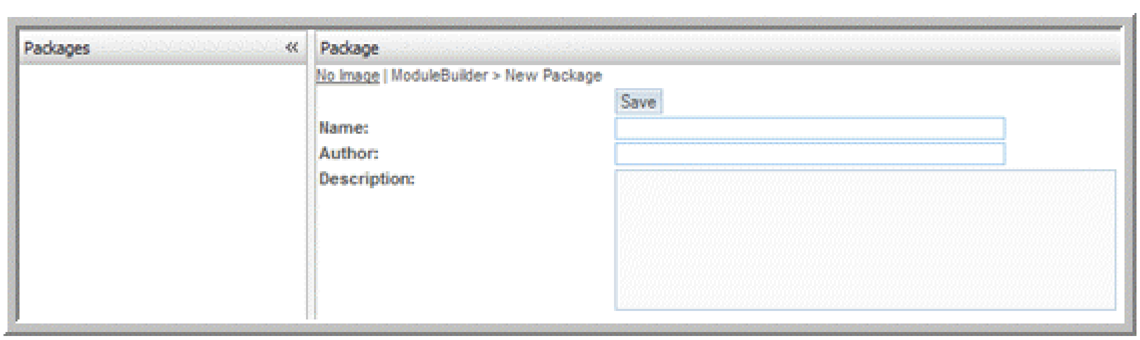
Issue. This template provides case and bug-specific fields such as ID, description, and created-by. Use this template to create a module that is similar to the Cases or Bug Tracker module.

Note: You cannot change the default fields that come from the selected template but you can remove them. You can also add new fields in the new module.

You can also define multiple relationships with other Sugar modules. Based on the relationships, you can specify the sub-panels that you want displayed in the new module. You can also display the new module as a sub-panel in the related modules.

To build a package

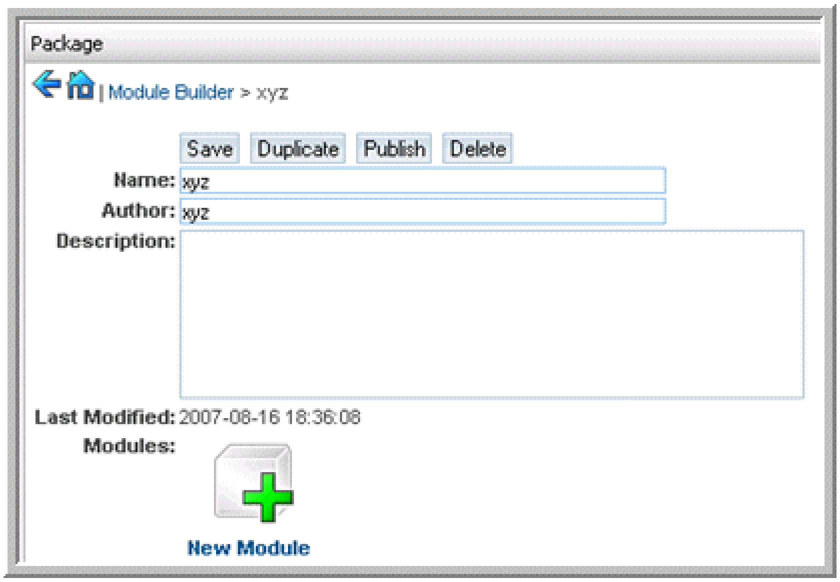
1. Select **Module Builder** from the Developer Tools sub-panel to view the Module Builder page.
2. Click **New Package**, enter a name for the package, and click **Save**.



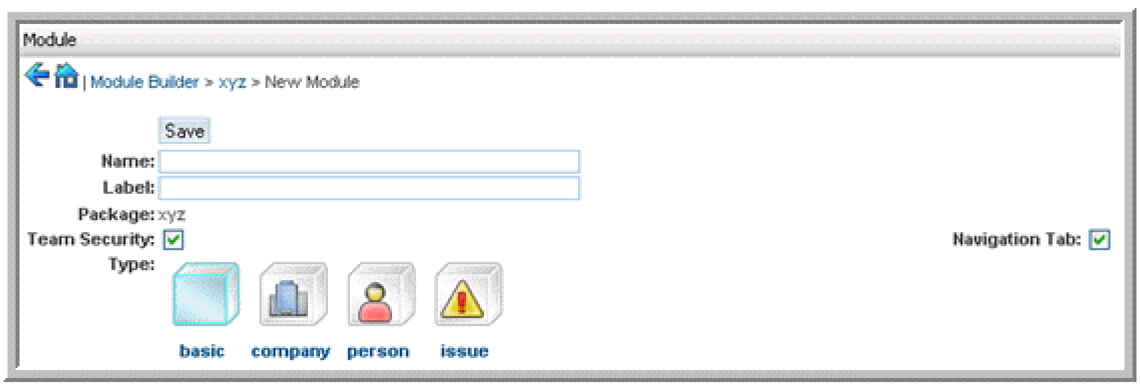
To build a module

1. Save the package.

The system displays the new Modules icon on the page.



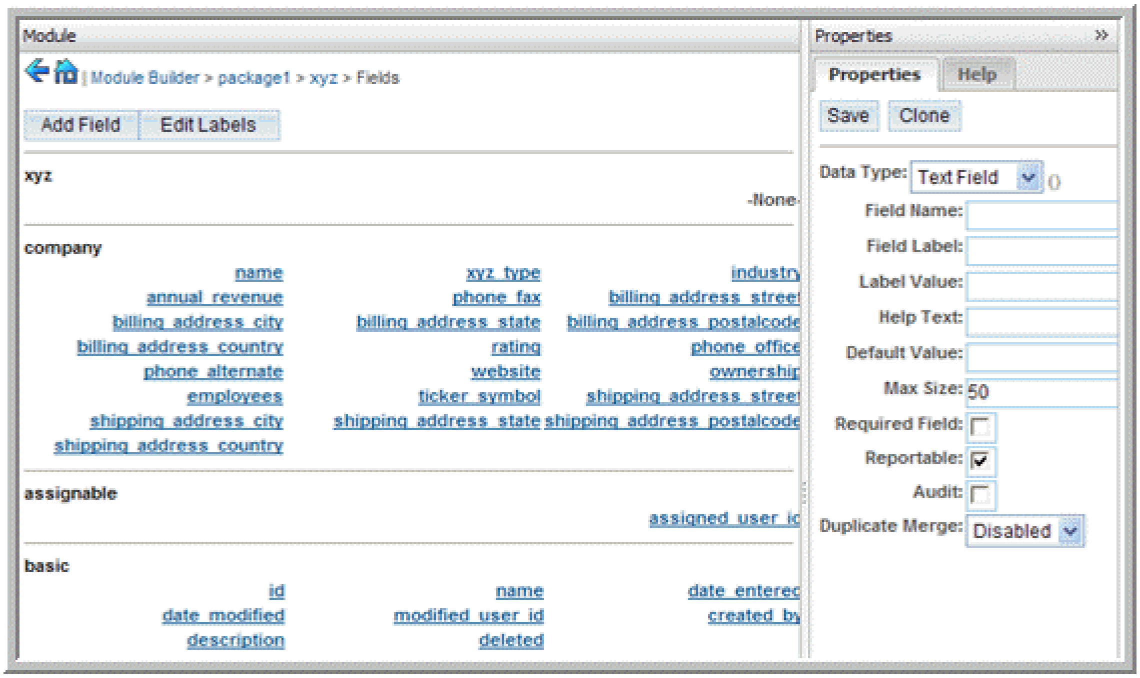
2. Click the icon to view the new module page.
3. Enter the module details, click the template you want to select, and click **Save**.



To view and create fields

1. To view the fields from the module, click **View Fields** in the module page.

The system displays the default fields available in the template.

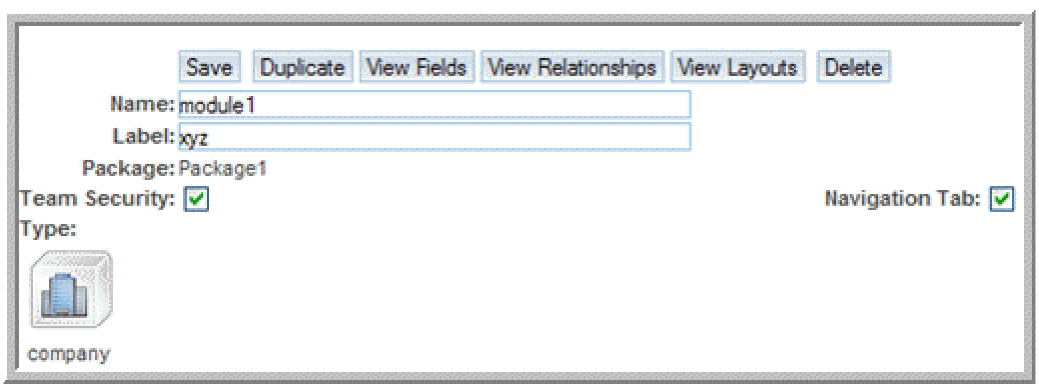


2. Click a field to view its properties in the right panel.

   You cannot change the properties of the default fields. You can, however, edit the properties that you specify for custom fields.

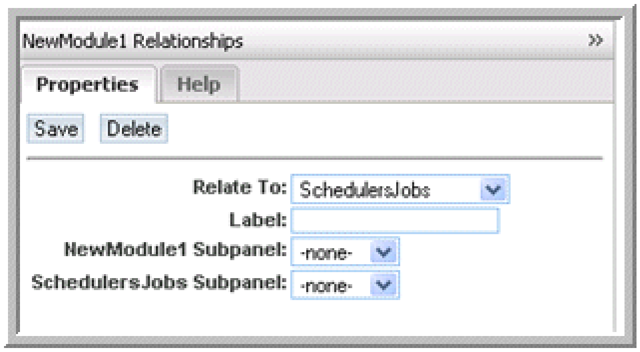
To create relationships

1. On the Module page, click **View Relationships**.



2. Click **View Relationships** and then click **Add Relationship.**

3. Enter the information in the right panel.



Relate-to. From the drop-down list, select the module you want to associate with your custom module.

You can create relationships between standard out-of-the-box Sugar modules, between standard modules and custom modules, and between custom modules.

Label. Enter a name for the relationship.

Subpanel. From the first Subpanel drop-down list, select Default if you want to display the associated module as a sub-panel on the detail page of the custom module. If not, select None.

From the second Subpanel drop-down list, select Default to display the custom module as a sub-panel on the detail page of the related module. If not, select None.

4. Click **Save** to save the relationship.

To publish a package

1. In Module Builder, select the package and click **Publish**.

   The system saves it as a zip file that you can save to your local machine. Use the Module Loader to load and install the module in Sugar