



Navigating Sugar





SUGARCRM®

Learning Objectives

- Navigating Sugar
- System Links
- Global Search
- Module Tabs
- Quick Create Shortcuts



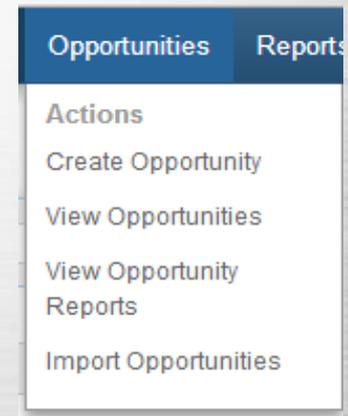


The Sugar user interface consists of various modules designed to help you manage customer-related records such as Contacts, Accounts, Products, Quotes and more.



Each module, representing a record type, groups the tools and functions needed to perform specific tasks.

This enables you to work more efficiently.



The Navigation Bar includes:

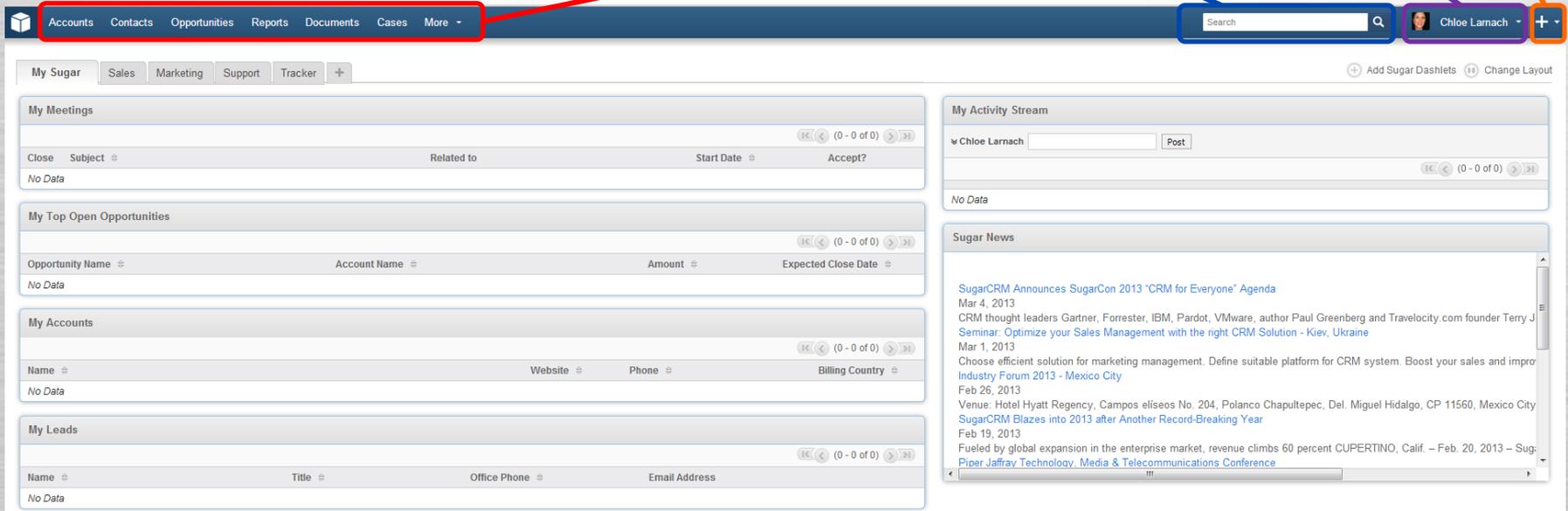
- System Links
- Global Search
- Module Tabs
- Quick Create Shortcuts

Global Search

System Links

Quick Create

Modules Tabs

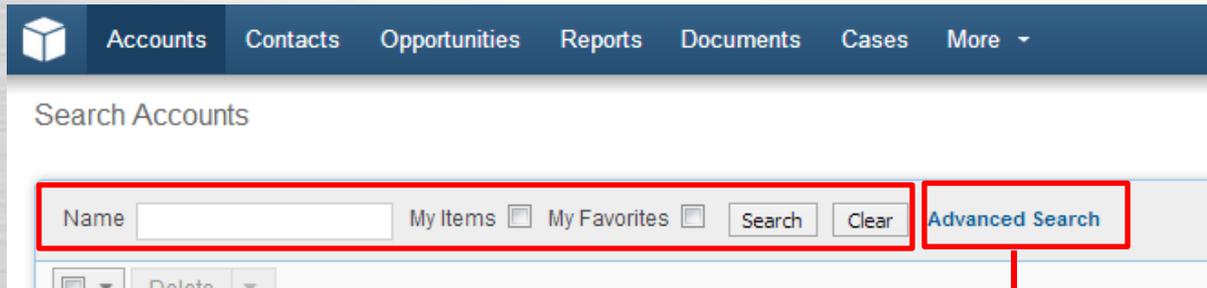


The screenshot shows the SugarCRM interface. At the top is a dark blue navigation bar containing a home icon, a menu of module tabs (Accounts, Contacts, Opportunities, Reports, Documents, Cases, More), a search bar, a user profile dropdown (Chloe Larnach), and a plus icon for quick create. Below the navigation bar is a dashboard with several widgets: 'My Meetings', 'My Top Open Opportunities', 'My Accounts', 'My Leads', 'My Activity Stream', and 'Sugar News'. The 'My Meetings', 'My Top Open Opportunities', and 'My Accounts' widgets show 'No Data'. The 'My Activity Stream' widget shows a 'Post' button and 'No Data'. The 'Sugar News' widget displays several news items with dates and titles.

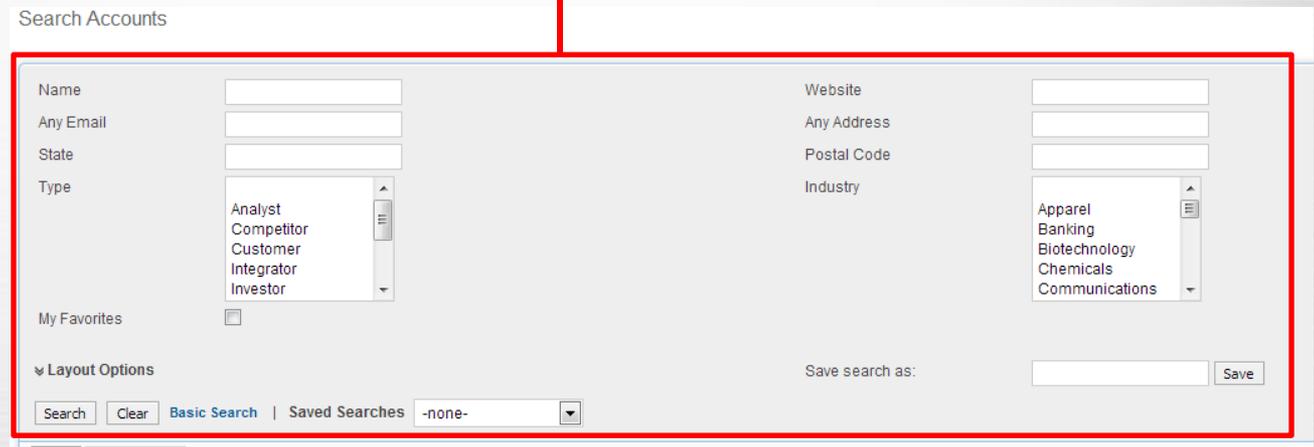
The module tabs includes actions and the last action you have used.

Search Function

There are search features in each module that allow you to search for a record in that module.



A screenshot of the SugarCRM interface showing the 'Accounts' search bar. The search bar is located at the top of the page, below the navigation menu. It contains a text input field for 'Name', a 'My Items' checkbox, a 'My Favorites' checkbox, a 'Search' button, a 'Clear' button, and an 'Advanced Search' button. A red box highlights the search bar area.



A screenshot of the 'Search Accounts' form, which is a detailed search interface. It is divided into two columns of search criteria. The left column includes fields for 'Name', 'Any Email', 'State', and 'Type' (a dropdown menu with options: Analyst, Competitor, Customer, Integrator, Investor). Below these is a 'My Favorites' checkbox. The right column includes fields for 'Website', 'Any Address', 'Postal Code', and 'Industry' (a dropdown menu with options: Apparel, Banking, Biotechnology, Chemicals, Communications). At the bottom, there is a 'Layout Options' section with a 'Search' button, a 'Clear' button, a 'Basic Search' link, a 'Saved Searches' dropdown menu (currently showing '-none-'), and a 'Save search as:' field with a 'Save' button. A red box highlights the entire search form area.

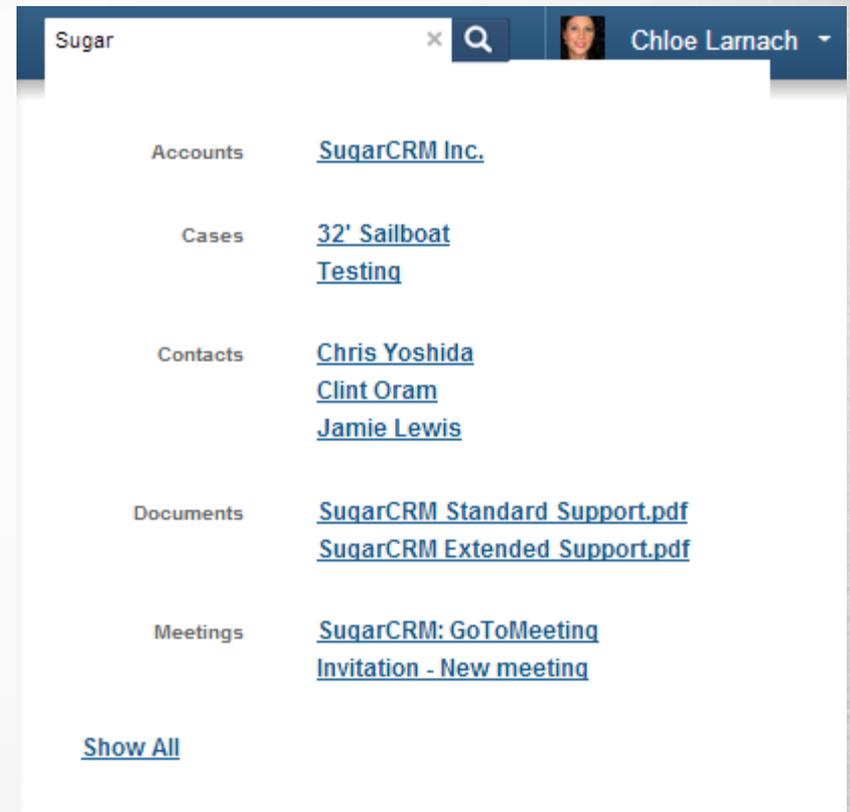
The global search allows you to search for key word across several modules at once.

For this example we will use the word Sugar.

Notice that the results displayed in a drop down format display several words with the key word in it.

These are related records to the key word search.

You can see that it has also picked the key word over several modules.

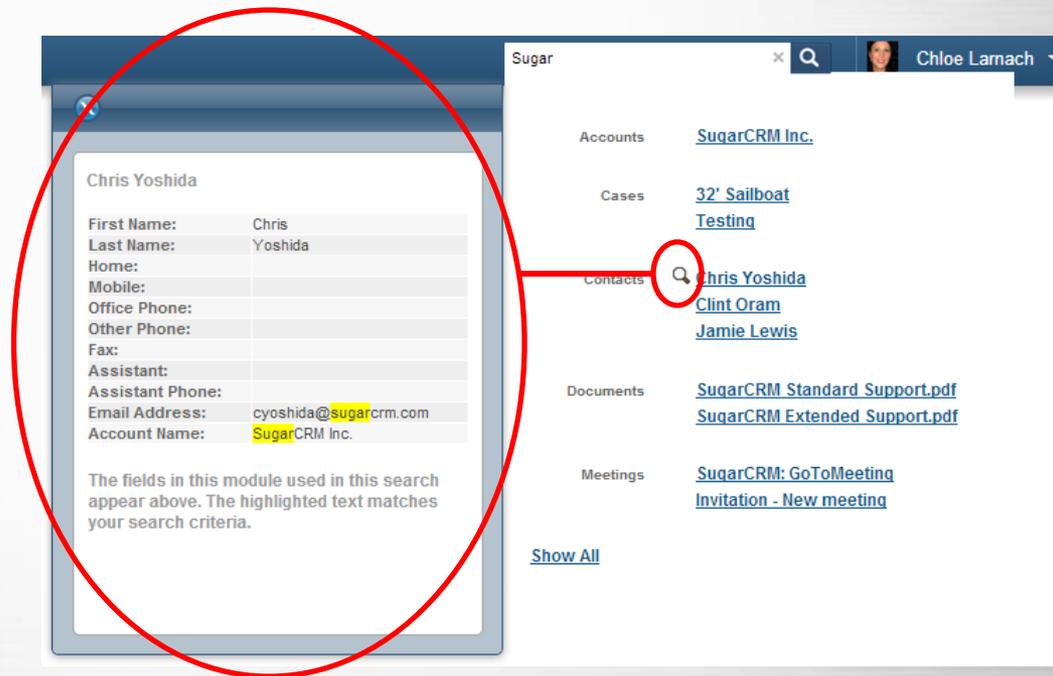
A screenshot of the SugarCRM search interface. The search bar at the top contains the word 'Sugar' and a search icon. To the right of the search bar is a user profile for 'Chloe Larnach'. Below the search bar, a dropdown menu displays search results categorized by module: Accounts (SugarCRM Inc.), Cases (32' Sailboat Testing), Contacts (Chris Yoshida, Clint Oram, Jamie Lewis), Documents (SugarCRM Standard Support.pdf, SugarCRM Extended Support.pdf), and Meetings (SugarCRM: GoToMeeting Invitation - New meeting). A 'Show All' link is located at the bottom of the dropdown menu.

Module	Results
Accounts	SugarCRM Inc.
Cases	32' Sailboat Testing
Contacts	Chris Yoshida Clint Oram Jamie Lewis
Documents	SugarCRM Standard Support.pdf SugarCRM Extended Support.pdf
Meetings	SugarCRM: GoToMeeting Invitation - New meeting

[Show All](#)

To verify that the result of the search is the correct one, hover over the search result.

A magnify glass will appear, click on the magnify glass to see a quick overview of the details in that record before selecting the record.

A screenshot of the SugarCRM interface showing search results. A red circle highlights a contact record for Chris Yoshida, and a magnifying glass icon is shown over the contact name in the search results list. The contact details include first and last name, phone numbers, email address, and account name. The search results list also shows accounts, cases, documents, and meetings related to the search criteria.

Chris Yoshida	
First Name:	Chris
Last Name:	Yoshida
Home:	
Mobile:	
Office Phone:	
Other Phone:	
Fax:	
Assistant:	
Assistant Phone:	
Email Address:	cyoshida@sugarcrm.com
Account Name:	SugarCRM Inc.

The fields in this module used in this search appear above. The highlighted text matches your search criteria.

SugarCRM Search Results:

- Accounts: [SugarCRM Inc.](#)
- Cases: [32' Sailboat Testing](#)
- Contacts: [Chris Yoshida](#), [Clint Oram](#), [Jamie Lewis](#)
- Documents: [SugarCRM Standard Support.pdf](#), [SugarCRM Extended Support.pdf](#)
- Meetings: [SugarCRM: GoToMeeting Invitation - New meeting](#)

[Show All](#)



You can also search for a keyword that may be found anywhere within a field by using a wildcard character.

In Sugar we use the percent sign before typing in the key word.

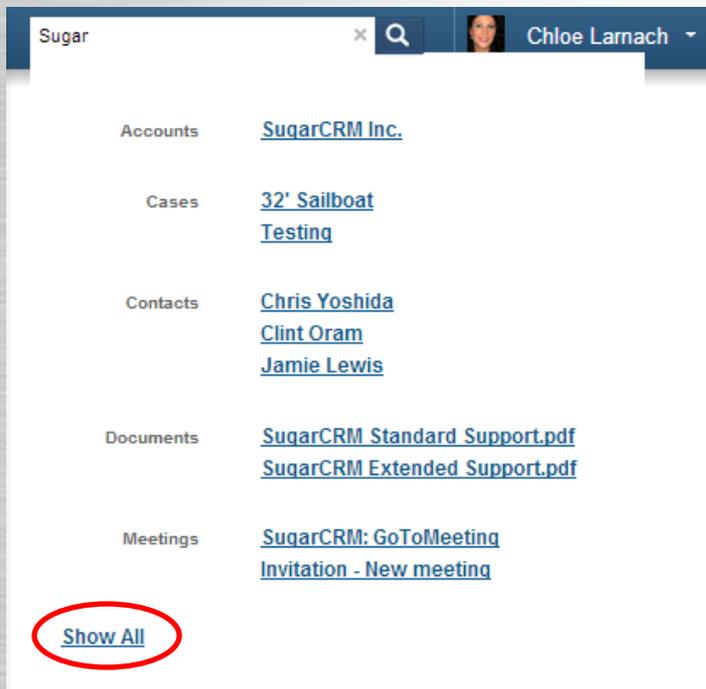
For example **%Sugar** returns all records and related records with the word in the name or subject line of all records.

Notice that several new records are now included in the search results. The search is now picking up the word Sugar in the name, subject line and body of the content in the record.

The screenshot shows the SugarCRM search interface. At the top, the search bar contains the query "%Sugar", which is circled in red. The user's name, "Chloe Larna", is visible in the top right corner. The search results are organized into categories:

- Accounts:** [SugarCRM Inc.](#)
- Calls:** [Discuss Sugar Solution Introduction to SugarCRM! Discuss SugarCRM license agreements Discuss Sugar Solution](#)
- Cases:** [32' Sailboat Testing](#)
- Contacts:** [Chris Yoshida](#), [Clint Oram](#), [Jamie Lewis](#)
- Documents:** [Importing your own data in the SugarCRM free Trial.pdf](#), [SugarCRM Standard Support.pdf](#), [SugarCRM Extended Support.pdf](#)
- Meetings:** [FW: Sugar 6.1 Launch](#), [SugarCRM: GoToMeeting Invitation - New meeting](#), [Meet with SugarCRM](#), [GoToMeeting Invitation - Sadler, Sugar Workflows.](#), [GoToMeeting Invitation - Sugar Partner Demo](#)

You can see more search results by clicking the **Show All** button at the bottom of the global search.



Sugar

Accounts: [SugarCRM Inc.](#)

Cases: [32' Sailboat Testing](#)

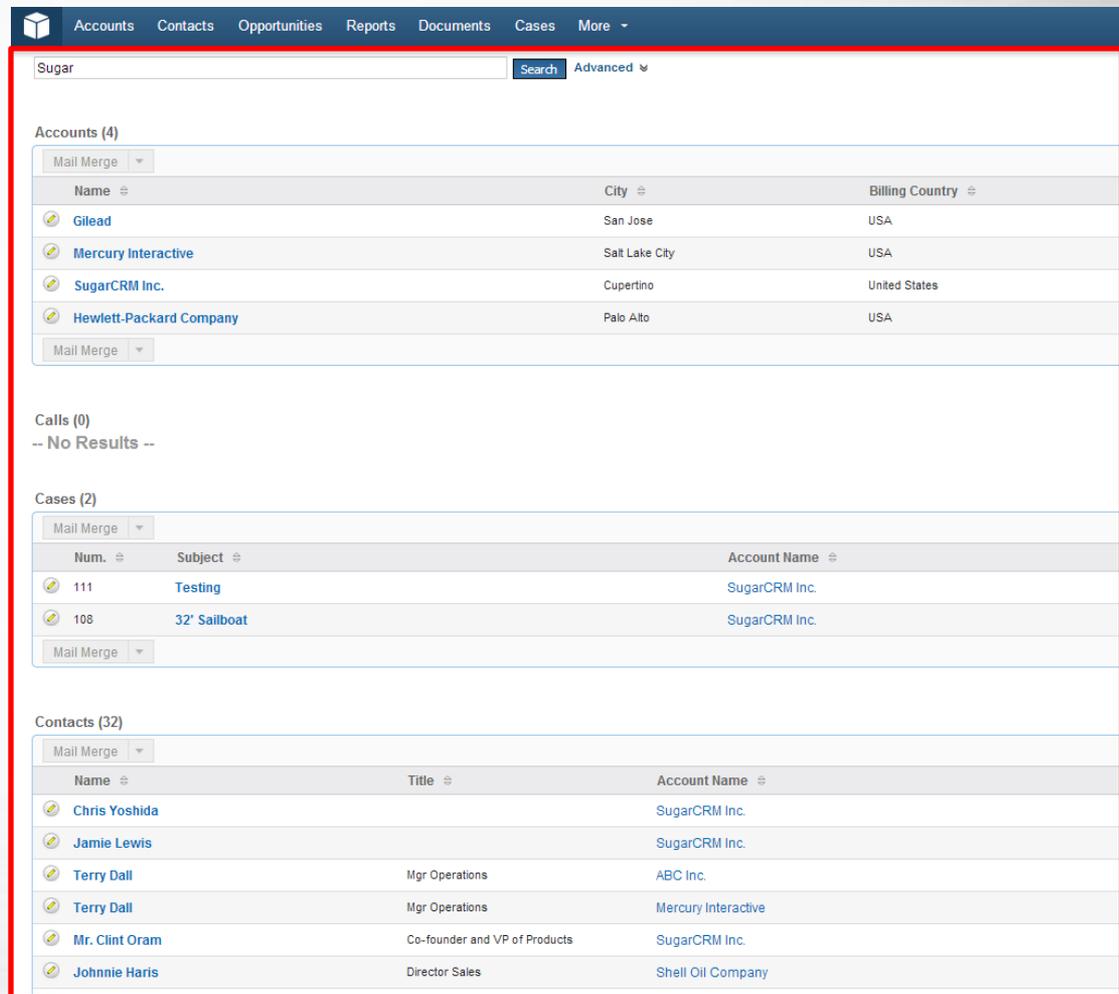
Contacts: [Chris Yoshida](#), [Clint Oram](#), [Jamie Lewis](#)

Documents: [SugarCRM Standard Support.pdf](#), [SugarCRM Extended Support.pdf](#)

Meetings: [SugarCRM: GoToMeeting Invitation - New meeting](#)

[Show All](#)

This search results page shows all the record found that are associated with your global search.



Sugar

Accounts (4)

Name	City	Billing Country
Gilead	San Jose	USA
Mercury Interactive	Salt Lake City	USA
SugarCRM Inc.	Cupertino	United States
Hewlett-Packard Company	Palo Alto	USA

Calls (0)
-- No Results --

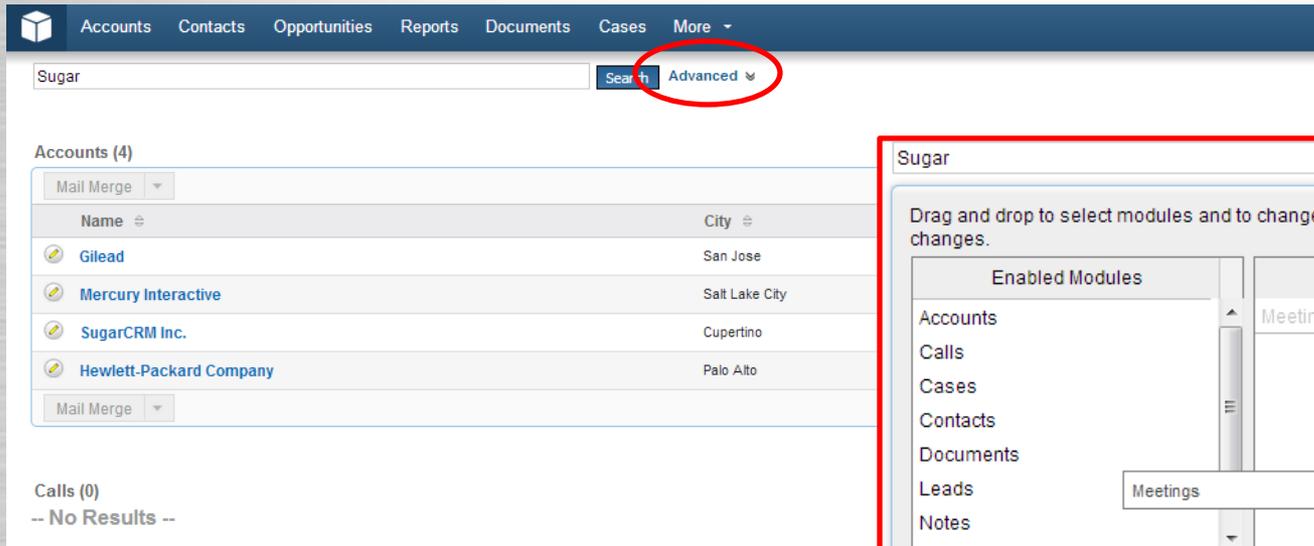
Cases (2)

Num.	Subject	Account Name
111	Testing	SugarCRM Inc.
108	32' Sailboat	SugarCRM Inc.

Contacts (32)

Name	Title	Account Name
Chris Yoshida		SugarCRM Inc.
Jamie Lewis		SugarCRM Inc.
Terry Dall	Mgr Operations	ABC Inc.
Terry Dall	Mgr Operations	Mercury Interactive
Mr. Clint Oram	Co-founder and VP of Products	SugarCRM Inc.
Johnnie Haris	Director Sales	Shell Oil Company

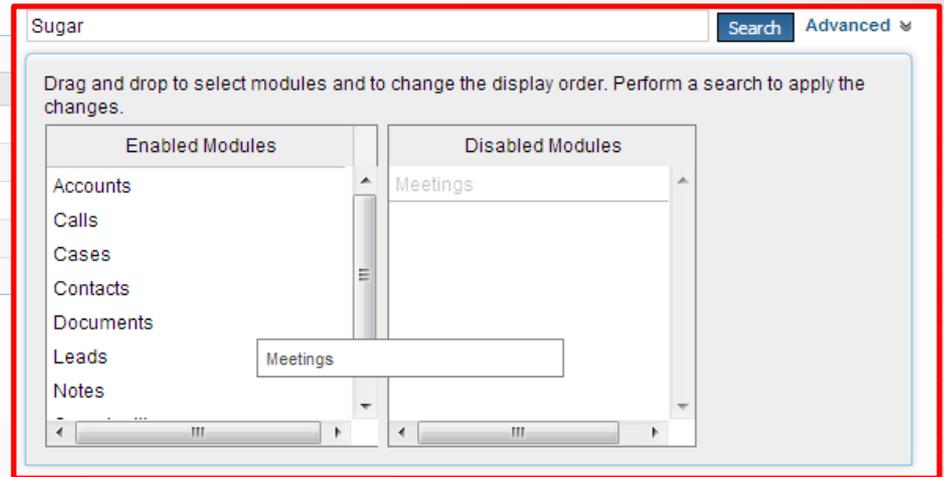
Under the advance option you can remove or replace modules previously disabled in the global search.



The screenshot shows the SugarCRM search interface. The search term is 'Sugar'. The 'Advanced' search option is selected and circled in red. Below the search bar, there are two sections: 'Accounts (4)' and 'Calls (0)'. The 'Accounts (4)' section contains a table with the following data:

Name	City
Gilead	San Jose
Mercury Interactive	Salt Lake City
SugarCRM Inc.	Cupertino
Hewlett-Packard Company	Palo Alto

The 'Calls (0)' section shows '-- No Results --'.



The screenshot shows the 'Sugar' search configuration window. It features a search bar with 'Sugar' and the 'Advanced' search option. Below the search bar, there is a message: 'Drag and drop to select modules and to change the display order. Perform a search to apply the changes.' The window is divided into two columns: 'Enabled Modules' and 'Disabled Modules'. The 'Enabled Modules' column contains a list of modules: Accounts, Calls, Cases, Contacts, Documents, Leads, and Notes. The 'Disabled Modules' column contains a list of modules: Meetings. A 'Meetings' module is being dragged from the 'Enabled Modules' column to the 'Disabled Modules' column.

Your sugar administration enables the modules available to you in the global search.

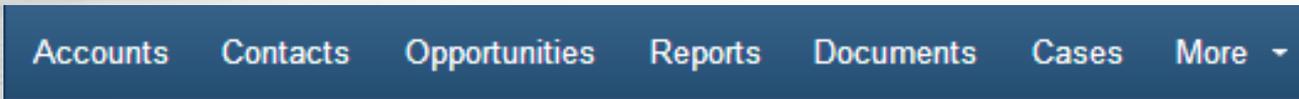
You can select a module from the enable module column and drag it over to the disabled column, if you don't want Sugar checking that module in the global search.

Scroll down the page to see all the search results displayed.

Modules

The **Module Tabs** are located at the top of the screen.

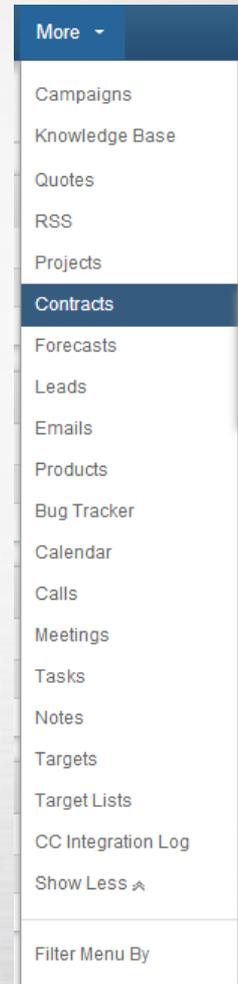
Each module hold all the record of that type.



All other modules that are not displayed in the module tab menu are in the overflow drop down.

All Company Records are located in the **Accounts Module** and all the Sales Deals are grouped in the **Opportunities Module**.

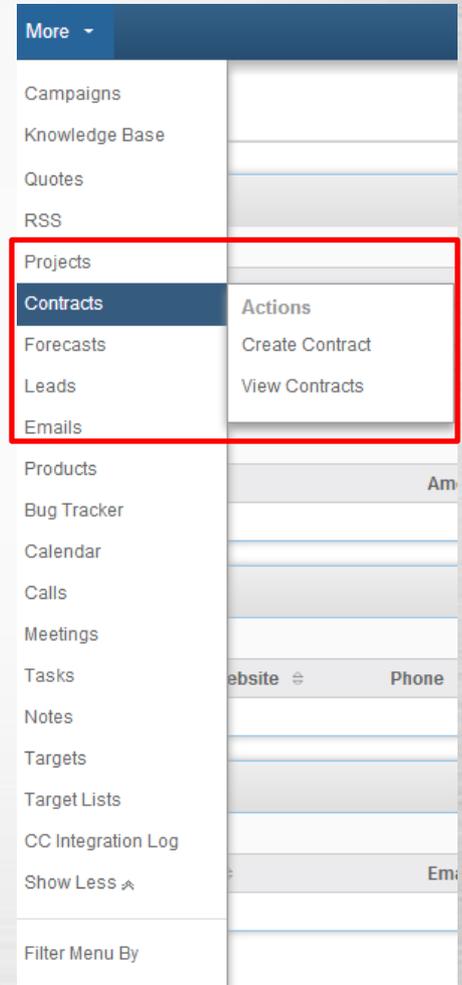
Overflow Drop Down



Each module tab contains a module menu containing an action menu and a list of your last view records in that module.

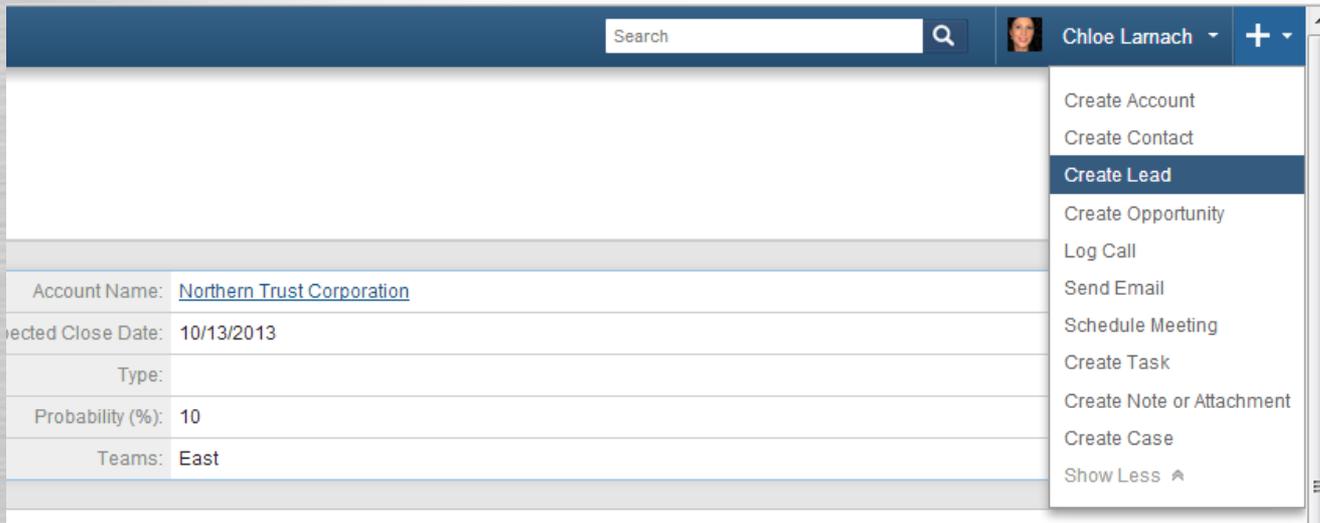
The last view list allows you to quickly open a record you recently viewed.

The actions menu hold the operation you can perform in that module.



To the far right hand side of the screen we have a **quick create** shortcut.

This allows users to quickly create a record without leaving the task being currently viewing in Sugar.

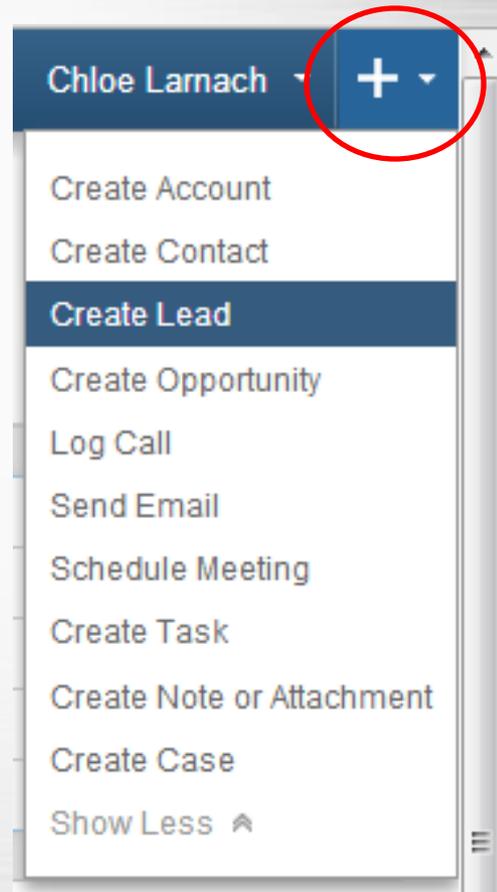


The screenshot shows the SugarCRM interface. At the top, there is a search bar and a user profile for Chloe Larnach. Below the search bar, there is a table with account details:

Account Name:	Northern Trust Corporation
Expected Close Date:	10/13/2013
Type:	
Probability (%):	10
Teams:	East

To the right of the table, a dropdown menu is open, showing the following options:

- Create Account
- Create Contact
- Create Lead**
- Create Opportunity
- Log Call
- Send Email
- Schedule Meeting
- Create Task
- Create Note or Attachment
- Create Case
- Show Less ^



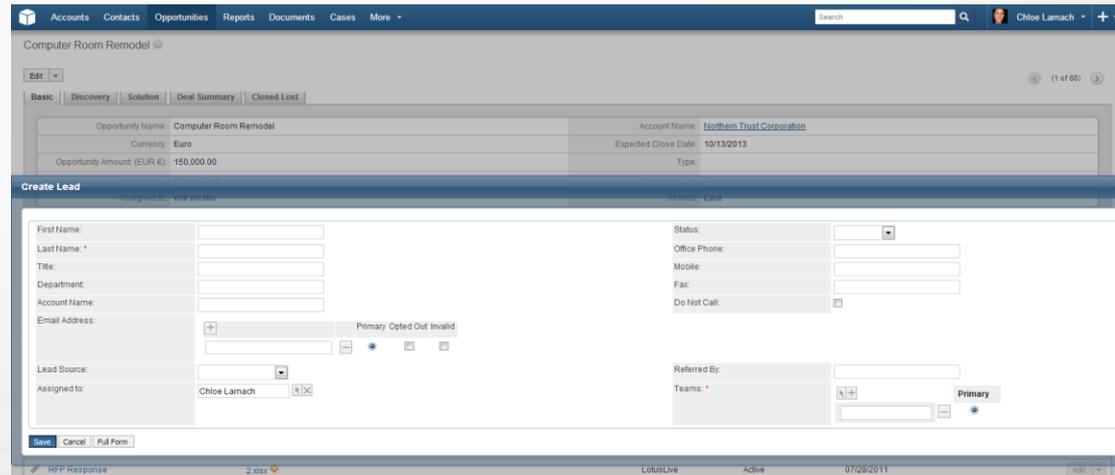
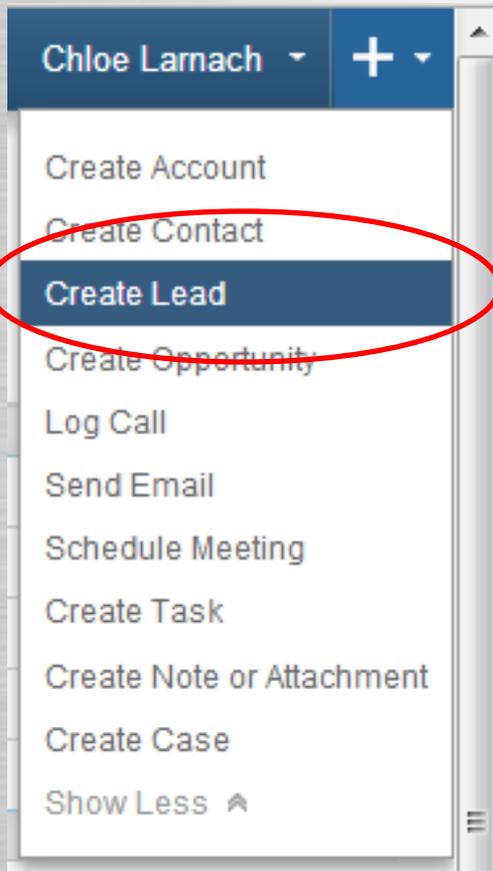
This is a close-up of the quick create dropdown menu. The menu is titled "Chloe Larnach" and has a plus sign icon in a blue box next to it. The menu items are:

- Create Account
- Create Contact
- Create Lead**
- Create Opportunity
- Log Call
- Send Email
- Schedule Meeting
- Create Task
- Create Note or Attachment
- Create Case
- Show Less ^

If you want to create a new lead record you would select create lead option.

A pop up appears as an overlay on top of the screen the user is viewing.

Once the information is entered and saved the pop up disappears and Sugar returns to the page previously being viewed.



Administrators can configure modules that can display in the **quick create** menu.



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