



Administration Training Document

How Do I ...

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Getting Started

1.1 How to Import Data

1.1.1 Introduction

The import function allows you to create multiple records at one time by bringing in data from other CRM systems, contact managers, custom comma delimited files, or custom tab delimited files. Preparing your data first is a key step before importing.

Note: This guide is not intended for new customers migrating all of their data from a previous CRM system into Sugar.

1.1.2 Importing Options

You can import data from various external sources into specific modules in Sugar. In the import process, you can choose the data source type, such as Microsoft Outlook, or select a specific Excel file type that you have saved your data as, such as a comma delimited file. The data source selection is subject to the module you are importing into. See the table below for details.

Best Practice: The recommended setting for importing records is 1,000 records at one time for peak performance. The system administrator manages the setting that determines how many records can be imported with a maximum setting of 20,000 records at one time.

Module	Data Source Type
Accounts	<ul style="list-style-type: none"> •Other CRM systems •Contact managers •Excel (comma delimited, custom delimited, tab delimited files)
Contacts	<ul style="list-style-type: none"> •Other CRM systems •Contact managers •Microsoft Outlook •Excel (comma delimited, custom delimited, tab delimited files)
Leads Opportunities Notes	<ul style="list-style-type: none"> •Other CRM systems •Excel (comma delimited, custom delimited, tab delimited files)
Targets	<ul style="list-style-type: none"> •Excel
Products Product Types Product Categories Manufacturers	<ul style="list-style-type: none"> •Other CRM systems •Excel (comma delimited, custom delimited, tab delimited files) <p><i>Note:</i> The Products and Manufacturers modules are available in Sugar Professional and Enterprise editions. Users with System Administrator privileges can access the import function for these modules in the Products and Quotes section of the Administration Home page.</p>

1.1.3 Preparing the Data Overview

To prepare the data before you import:

- Cleanse the data in the spreadsheet
- Confirm the drop-down field database values
- Assess the correct order of data import if importing into multiple modules
- Relate records on import

Details on the drop-down field database values, assessing the correct order and relating records are available towards the end of this guide.

1.1.4 Cleansing the Data

Best Practice: Before you import data into Sugar, it is a best practice to make sure it is accurate by checking for:

- Spelling errors
- Duplicate records
- Correct formatting
- Missing information that you may need to add to populate the module properly

1.1.5 Importing Data

Once you have prepared your data and determined the order the data will be imported, you are ready to import your data.

Importing data is a four step process:

1. Select the source
2. Upload export file
3. Confirm fields and import
4. Import results

1.1.6 Import Step 1 : Select the Source

The first step is to select your data source.

Step	Action
1	From the module home page, click Import in the Shortcuts section. <i>Result:</i> The Import Step 1: Select the Source page appears.
2	Select the appropriate data source and click Next . <i>Result:</i> The Import Step 2: Upload Export File page appears

1.1.7 Import Step 2 : Upload export file

Next, upload the export file.

Step	Action
1	Click Browse to navigate to the file you wish to import from your local file system; in the File Upload dialog box select the file and click Open .
2	The system defaults to a checked Has Header box. If your file does not contain headers, you can un-check this box. Click Next . <i>Result:</i> The Import Step 3: Confirm Fields and Import page appears.

1.1.8 Import Step 3 : Confirm fields and import

In step 3, confirm the data fields you are importing. During an import, you have the options to save your selections as a custom mapping and to check for duplicates already in the system.

Creating a custom mapping allows you to save the mapped field selections and give your custom mapping a name. When you choose your custom mapping for future imports with the same type of data your custom drop-down selections will appear for the new import.

Using the **Verify duplicate entries against selected indexes** feature prompts the system to check for and automatically skip importing any possible duplicates during the import.

Step	Action
1	Map the database field to the header row by selecting the appropriate field name from the drop-down list. Notes: You must map the fields to successfully import data. If you wish to ignore a field, select Do not map this field from the drop-down list. Review the Notes section at the bottom of the page for required database fields and other mapping information. This information is unique to the module you are in.
2	<i>Optional:</i> Check the Save as Custom Mapping box and fill in the Save as Custom Mapping field box with a name for your import to save your Database Field drop-down selections. <i>Note:</i> The saved custom mapping will be available for future selection as a data source type in Step 1 of the import process.
3	<i>Optional:</i> To check for duplicate information in the system, click the desired data fields in the Index(es) not used column and then click the arrow icon to move the Index(es) not used data fields to the Index(es) used column. The system will check for duplicate information for the data fields in the Index(es) used column only. Notes: You can select one data field to move, or select more than one at a time by holding down the Ctrl button on your keyboard and selecting each filter you would like to move. If duplicate information is found, the duplicate records will be skipped during the import process and can be accessed by clicking the Download List of Duplicates link on the Import Results page.
4	After all of your selections are complete, click the Import Now button located in the lower right corner of the screen. <i>Result:</i> The Import Results page appears with a list of your imported leads.

1.1.9 Import Step 4 : Import results

Finally, check your results and complete the import.
 From the **Import Results** screen you can select:

Finished to complete your import

You can then conduct a search to locate your new record(s) and edit, add, or delete information as needed, OR

Undo Last Import to revise or edit your import, OR


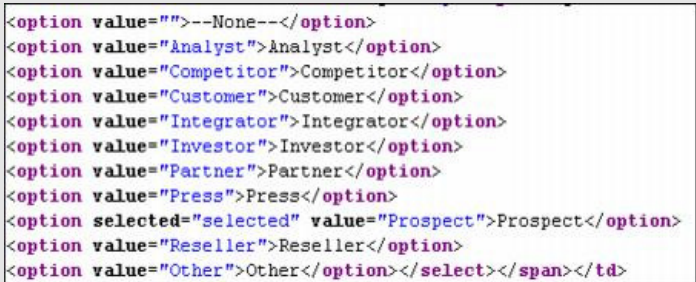
Import More to continue importing data

1.2 Additional Considerations

1.2.1 Confirming Drop-down Field Values

To import drop-down field information properly, confirm that the drop-down value you are importing is listed in your spreadsheet as it appears in the database. To do this, contact your system administrator who can retrieve the database value for you or you can view it yourself by reviewing the html source code on a record edit view.

Step	Action
1	From the appropriate module list view, drill into a record name.
2	From the record detail view, click Edit .

3	<p>From the record edit view, use your mouse to highlight the appropriate drop-down field, drop-down selection box, and the next available database field. You must highlight the next available database field to capture the drop-down selection box values.</p> <p>The graphic below shows the Accounts module drop-down field “Type”, its corresponding drop-down selection box and the next available database field “Annual Revenue” highlighted.</p> 
4	<p>Right click on the highlighted selection.</p>
5	<p>Select View Selection Source. Result: A view-source window appears with the source code selection highlighted including the drop-down field values.</p>
6	<p>Click anywhere in the view-source window. The drop-down field value choices display in quotation marks, highlighted in blue.</p> <p>The graphic below shows the Accounts module drop-down field “Type” database value choices.</p>  <pre> <option value=""--None--</option> <option value="Analyst">Analyst</option> <option value="Competitor">Competitor</option> <option value="Customer">Customer</option> <option value="Integrator">Integrator</option> <option value="Investor">Investor</option> <option value="Partner">Partner</option> <option value="Press">Press</option> <option selected="selected" value="Prospect">Prospect</option> <option value="Reseller">Reseller</option> <option value="Other">Other</option></select></td> </pre>
7	<p>Enter the appropriate database value without the quotation marks into the import spreadsheet corresponding column.</p>

Best Practice: If you are importing data into a module that allows you to relate records to accounts, import the account records first if they are not already in Sugar as a best practice to ensure the new account record fields are populated.

You can relate records to accounts during import in the Contacts, Accounts and Opportunities modules. Create an account spreadsheet and import the account records into the Accounts module first.

1.2.2 Assessing the Import Order

Example :

To import account data from a simple contact manager application like Microsoft Outlook, manipulate the contact data to create an account spreadsheet you will import first with the appropriate account record data fields.

As a result the account records will be created with populated data fields.

Then import the contact records with the appropriate account name data field in the import spreadsheet to relate the contact records to the appropriate account records.

Step	Action
1	Save the contact data spreadsheet as Account_Import and sort by company name.
2	Delete any duplicate account records.
3	Add new columns for account record fields as needed.
4	Import the new account data (follow Import Steps above).
5	Import the contact data (follow Import Steps above).

1.2.3 Relating Records on Import

You can relate records you are importing to existing records in Sugar. The record type available to relate and how you relate the records are unique to each module.

Manage Users

2.1.1 Introduction

User Management allows you to create, edit, activate and deactivate users in Sugar. You can also reassign records in multiple modules from one user to another.

2.1.2 User Types

Sugar has four types of users: end-users, administrators, group users and portal-only users. Privileges for each user are described below.

Sugar has four types of users: end-users, administrators, group users and portal-only users. Privileges for each user are described below.


End-user: Can access and use Sugar modules but does not have administrative privileges.

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. You create a group user when you create a group for an inbound email inbox. *Example:* You can create a group user named Support to handle customer support issues.

Portal-only user: Can use portal web services. A portal-only user cannot login through the Sugar web interface.

2.1.3 Accessing User Management

The Users page is available from the system links, in the top right corner of Sugar.

Step	Action
1	Login to Sugar with your administrator login and password.
2	Click the Admin link in the system links in the top right corner.  <i>Result:</i> The Administration: Home page appears.
3	In the Users sub-panel, click the User Management link. <i>Result:</i> The Users: Home page appears.

2.1.4 Creating Users

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

This information will also appear on the Employees page, which can be accessed by clicking the **Employees** link.

Step	Action
1	In the Shortcuts section of the Users Home page, click Create New User .
2	In the top sub-panel, enter the user name, the login name and password, and the user status.
3	In the User Settings sub-panel select the following: Select the appropriate box to specify whether the user is an administrator, a group user, or a portal-only user. Specify whether the system should send an email notification to the user when a record is assigned to that person. Specify 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.
4	In the Locale Settings sub-panel select the following: The system displays the default values for the date and time format, the time zone, and currency values as specified on the System Settings page. -You can change these values for individual users if necessary.
5	In the User Information sub-panel, specify the user's employee status, title, department, phone numbers, IM (Instant Messenger) type and ID. You can add comments in the Notes field, if necessary.
6	In the Address Information sub-panel, specify the user's home address.
7	In the Calendar Options sub-panel, you can enter a publish key to prevent others from publishing the user's calendar without authorisation.
8	In the Layout Options sub-panel, you can limit access to Sugar by granting the user access to specific modules. By default, the user has access to all the modules. To change the position of tabs, click the selected tab in the Display Tabs list, and then the up or down arrow to the left. To hide a module from the user's view, move the module tab to the Hide Tabs list using the right arrow. To display a module to a user, move it from the Hide Tabs list to the Display Tabs list using the left arrow. To globally remove tabs, move the module tab to the Admin Remove Tabs with the far right arrow.
9	In the Email Options sub-panel •Click Add Address. •Enter the user's email addresses. Select the appropriate radio button to specify whether this email address will be Primary or used as a Reply-to. •Select the user's email client from the Email client drop-down menu.
10	To create the user record, click Save ; click Cancel to exit the page without saving your changes.
11	To change the user password, click Change Password , enter the new password, and then click Save .

2.1.5 Managing User Information

Once a user is created, you can update the record as well as assign roles.

User records cannot be deleted in Sugar; this allows the system to maintain a historical context of users and their assignments.

Instead of deleting users, change the user status from active to inactive.

To update the status of some or all users in the Users list, use the Mass Update sub-panel; details are in the Editing Multiple items section below.

Step	Action
1	To view a user's details, click the user's name in the Users list. Result. Additional sub-panels appear The read-only role-based privileges table will appear if the user has been assigned a role. •Assign a user to a role in the Roles sub-panel.

	Assign a user to a team in the My Teams sub-panel (Professional and Enterprise editions only).
2	To edit user details, on the detail page, click Edit , change the information as needed. When edits are complete, click Save .
3	To duplicate the user details, on the detail page, click Duplicate , edit the information as necessary.
4	To change the user password, on the detail page, click Change Password , enter the new password.

2.1.6 Ending Multiple Items

The status of multiple users can be changed at the same time.

Step	Action
1	Select the checkboxes of the users you want to edit.
2	In the Mass Update sub-panel, enter the revised status for the desired fields and click Update .

2.1.7 Reassigning Records

You can assign multiple records from one user to another user at one time. Select the records to reassign by module and specific module filters.

Follow these steps to reassign records from one user to another.

Step	Action
1	In the Shortcuts section of the Users Home page, click Reassign Records .
2	Select the user you want to reassign records from in the From User drop-down menu.
3	Select the user you want to reassign records to in the To User drop-down menu.
4	Select the team assignment for the records in the Set team to drop-down menu.
5	Use the Modules to include in reassignment multi-select list to select which module records are reassigned. Note: Depending on the module that is selected, filters may display below the Submit and Clear buttons. Use the filters to determine which records are chosen during the reassignment process.
6	Click the Submit button. Result: The Record Reassignment confirmation page displays.
7	On the Record Reassignment page: Check the Verbose Output checkbox if you are planning to use the Record Reassignment function with an existing workflow Check the Include Workflow/Notifications/Audit checkbox to send notifications and have record reassignments added to the audit table.
8	Click the Continue button to proceed with reassignment. Result:

	The Record Reassignment Processing Accounts page displays.
9	Click the Return button to return to the previous screen to make modifications to current settings.

Manage Roles

2.1.8 Introduction

Roles enable you to group users according to the tasks that they need to perform and then define a set of privileges.

2.1.9 Role Characteristics

Roles have the following characteristics:

Roles control what a user can do with a record once the system retrieves the record from the database.

-Teams, on the other hand, control data retrieval security.

•A particular set of privileges can be identified as a role and assigned to a user.

•A role takes effect when you assign it to a user.


You can assign users to more than one role. When a user is assigned to multiple roles, the role with the more restrictive prevails.

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.

2.1.10 Accessing Roles

The Role page is available from the system links, in the top right corner of Sugar.

Step	Action
1	Login to Sugar with your administrator login and password.
2	Click the Admin link in the system links in the top right corner.  <i>Result:</i> The Administration: Home page appears.
3	In the Users sub-panel, click the Role Management link. <i>Result:</i> The Role page displays.

2.1.11 Creating Roles

The appropriate roles will be set up just once, and then users will be assigned to each role.

Step	Action
1	In the Shortcuts section of the Role page, click Create Role .
2	Enter a name for the role.
3	Enter a description for the role.
4	Complete the privileges in the table sub-panel. See the Setting Privileges section for details.
5	To create the role, click Save ; click Cancel to exit the page without saving your changes.

2.1.12 Setting Role Privileges

A role defines a set of privileges to perform specific tasks. You can create multiple roles. You can then assign one or more users to each role to enable them to access the appropriate Sugar modules and perform the tasks.

Example: You can create a role called Support with privileges to access, read, and write to the Bug Tracker module. Then, users assigned to the Support role can access the Bug Tracker module to view and report bugs. You can further specify whether role members can import and export bug information.

Step	Action
1	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 .
2	To specify the user type, double-click the User Type field corresponding to the module, and select Normal (for End-user privileges) or Admin (for Administrator privileges).
3	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 a record's owner to delete the record. None: Prevents all users of the specified user type from deleting records in the module. Privilege descriptions are in the table below.
4	When new roles are created, the default value of Access, User Type, and Operations is Not Set . Important: Not Set serves as a placeholder for permissions that can be applied. However, there are permissions in the drop-down list for each role option that are synonymous with Not Set. The default value of Not Set applies a permission to each role option as follows: <ul style="list-style-type: none"> •Access: Not Set = Enabled •User Type: Not Set = Normal •Function (Delete, Edit, etc): Not Set = All

Privilege	Description
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 section to update records for the module.
Export	Export data in the module. The Export link located at the top of a list view is removed when this privilege is not available to the user.
Import	Import item 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 list view when this privilege is not available.
View	View items in the module. The user is unable to access the module detail view when this privilege is not available.

2.1.13 Duplicating Roles

For creating new roles, a best practice is to duplicate existing roles to save time setting role privileges.

Step	Action
1	In the Shortcuts section of the Role page, click List Roles .
2	Select the role that is similar to the new role you wish to create.
3	Click the Duplicate button.
4	Edit the role fields and privileges as desired
5	To create the role, click Save ; click Cancel to exit the page without saving your changes.

2.1.14 Setting Field Level Permissions

You can apply field level permissions to existing roles to add a more granular level of security to modules that have multiple access types and usages.

Example: Your support and sales users have access to the Opportunities module. For sales users, you want to limit visibility to the amount field to the assigned to user only. However, for support users, you do not want anyone to view the opportunity amount field. To address these needs, create a Sales role and set the opportunity amount field to Owner Read / Owner Write; add the desired sales users to this role. Then create a Support role and set the opportunity amount field to None; add the desired support users to this role.

Step	Action
1	In the Shortcuts section of the Roles: Home page, click List Roles . <i>Result:</i> The Roles: Home page displays.
2	Click the role name you wish to modify.
3	To the left of the role privileges table, select the link of the module you wish to apply field level permissions.
4	In the Field Permissions sub-panel: Double-click Not Set next to the field you wish to modify to display the field permission drop-down list. •Select the desired field permission. See the table below for field permission descriptions. <i>Note:</i> To the right of the field name is a plus sign. Clicking this displays the database name of the field(s) associated.
5	To save modifications, click Save ; click Cancel to return to the role privileges table without saving your changes.

Field Permissions	Description
Not Set	Default setting. No permissions may be applied.
Read / Write	Role users are able to view and edit.
Read / Owner Write	Role users are able to view, but only record owners may edit.
Read Only	Role users are only able to view.
Owner Read / Owner Write	Only record owners may view and edit.
None	This field is hidden from all users.

Email Setup

2.1.15 An Introduction to Email Functionality in SugarCRM

This section is a discussion of basic email functionality within SugarCRM. Email is divided into two categories, inbound and outbound. There is an assortment of functionality made possible by integrating SugarCRM with an email system. A few examples include:

- Auto-creating cases
- Auto-associating notes to cases based on a case macro
- Handling bounced messages from campaigns
- Notifying customers of case status changes
- Notifying users of various events with workflows
- Sending out marketing email campaigns
- Sending personal emails to contacts

2.1.16 General Email Terms

Before we get too deep into SugarCRM specific functionality lets review a few general email terms. Also, please note that when configuring SugarCRM to integrate with your email system it is helpful to be familiar with your email system or have someone on hand who is (e.g. IT).

- SMTP - Stands for “Simple Mail Transfer Protocol” and is used for outbound email.
- POP3 - Stands for “Post Office Protocol” and is used for inbound email.
- IMAP - Stands for “Internet Message Access Protocol” and is also used for inbound email.

When configuring SugarCRM to send email you will need to know:

1. SMTP server hostname (mail [dot] mydomain [dot] com)
2. Port
3. Username
4. Password

When configuring SugarCRM to receive email you will need to know:

1. Mail server hostname (mail [dot] mydomain [dot] com)
2. Mail server protocol (IMAP or POP3)
3. Port
4. Username
5. Password

Note: This information should be available from your IT department.

2.1.17 Outbound Email (SMTP) in SugarCRM

There are two types of outbound email accounts, system and personal.

System

Only one system outbound email account is allowed and is configured under Admin > Email Settings. Most of the functionality listed above (notifications, campaigns, etc.) uses the system outbound email account. Information regarding setting up a system outbound email account can be found in the SugarCRM Administration Guide.

Note: When configuring the system outbound email settings you will notice the field “Mail Transfer Agent”. Most SugarCRM systems use “SMTP”. The other option, “sendmail”, refers to an application found in many Unix/Linux systems. If you choose to use “sendmail” as your mail transfer agent you

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are responsible for configuring it on your server. If you do not know what “sendmail” is then you should use “SMTP”.

Personal

Personal outbound email accounts can be configured in the Emails module through the Settings window. Only personal emails sent from the Emails module use personal outbound email accounts.

Note: Users can still send emails from the Emails module if they don't setup a personal outbound email account. SugarCRM will use the system outbound email account by default.

2.1.18 Inbound Email (IMAP, POP3) in SugarCRM

SugarCRM provides the following features to manage inbound emails:

1. Personal accounts
2. Group accounts
3. Personal folders
4. Group folders

The above features provide a variety of ways to interact with emails from IMAP or POP3 email accounts. A quick overview of each is provided below; more in depth information can be found in the SugarCRM Administration Guide.

Personal Account

What is a personal email account?

Personal email accounts are configured by individual users in the Settings menu accessed from the Emails module. They provide a “live” view of an inbound email account. Emails for personal email accounts are not stored in the SugarCRM database (except for a cache of the email headers which is not especially important to know at this time); instead, when a user requests to view an email SugarCRM will open a connection to the configured email server and request the desired email.

Since SugarCRM opens a connection to the email server for each request (Check Mail, view email, etc.) if your email server imposes a connection limit and you have several users with personal accounts, SugarCRM may exceed this connection limit. When a connection limit is exceeded the email server will begin to block requests which can lead to unusual behavior such as:

Email bodies not returned when selecting an individual email
Check mail operations timing out
Emails not deleting successfully from the email server

To resolve these types of issues you will need to ask your email service provider to lift any connection limits or use one of the group mail options described below.

Note: This is the only email account type that responds to the “Check Mail” button found in the Emails module.

What would a personal email account be used for?

Personal email accounts can be used by individual users to view their personal email accounts within SugarCRM. Due to connection limits imposed by many email servers, however, this type of email account is not often used. Email integration with SugarCRM is better suited for group emails, for example a support organisation may access their “support” inbox through SugarCRM.

Group Accounts

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What is a group email account?

A group account is useful when multiple users need to access a single email inbox. Instructions for setting up a group account can be found in the SugarCRM Administration Guide. Group accounts are identical to personal accounts except for the following:

1. The “Check Mail” button does not work for group accounts. The check mail process is run by a scheduler. The default scheduler, “Check Inbound Mailboxes”, is provided which will check all configured email accounts. You will need to setup cron for this to work.
2. Multiple users can access a group email account. Access to group email accounts is controlled by the value of the field “Assign To Team” which is set during the configuration of the email account. For example, if a group email account is assigned to the Global team than all users will have access to that email account.

Note: Since the check mail process is run by a scheduler the number of connections to the email server from SugarCRM is reduced as compared to a personal email account. However, the connection limit issue mentioned earlier may still apply since a connection is used by each user for each viewed email.

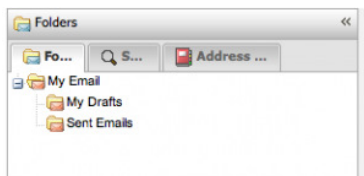
What would a group email account be used for?

In addition to shared inboxes, group accounts can also be used for bounce handling mailboxes in email campaigns.

Personal folder

What is a personal folder?

For each user a default set of personal folders is provided; these folders are visible when a user navigates to the Emails module. New personal folders can be created by clicking the right mouse button on an existing folder (e.g. My Email) and choosing Create Folder. Users can archive emails by dragging them from personal or group accounts into a folder.



Note: Personal folders are reliant on a user’s private team to function properly. It is important to maintain a user’s association with their respective private team for this feature to function properly.

Group folder

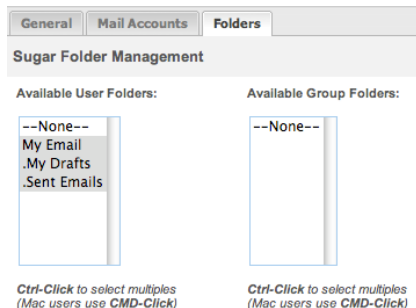
What is a group folder?

A folder is a collection point for archived emails. Archived emails are emails that have been pulled from an email server and downloaded to a SugarCRM database. Emails are archived by moving them from personal or group email accounts into a folder. As we’ll discuss in a minute the process of archiving emails can be automated.

Group folders are folders that can be accessed by multiple users. Only admin users can create group folders. When group folders are created they are assigned a team. This assigned team controls what users have access to the folder. For example, a group folder assigned to the Global team will be

accessible to all users.

Users can control what folders are visible in the Email UI through the Settings menu in the Folders tab.



So far this is pretty boring stuff. The cool part of group folders is the ability to setup automated archiving of group accounts into group folders. During the definition of a group account (Admin > Inbound Email), admins can set the field “Assign To Group Folder” to a group folder. When SugarCRM runs the check mail process (run by a scheduler) emails are pulled from the email account and automatically archived into the chosen group folder. Along with the automated archiving of emails, admins can also configure SugarCRM to automatically create cases from incoming emails.

Note: When a group account is associated to a group folder, users will no longer be able to access this account under Emails > Settings > Mail Accounts. Instead, the account is hidden and users access emails from the group folder.

Another Note: When emails are viewed from a group folder they are pulled from the SugarCRM database rather than from the email server. The only connection opened to the email server by SugarCRM is the one opened during the check mail process. This provides a workaround if you run into connection limit issues (discussed above) with your email service provider.

What would a group folder be used for?

Group folders can be used for shared inboxes, bounce handling mailboxes, and case auto-creation.

Should I use a group account or a group folder?

This will depend on the capabilities of your SugarCRM server and email server. Using a group account will tax your email server more than a group folder, however, it will limit the number of emails imported into the SugarCRM database. It seems most users have the best experience with group folders; accessing emails from the database, instead of the email server, seems to be more reliable.

You should discuss these options with your database administrator and email service provider to make the best decision for your individual situation.

2.1.19 Troubleshooting Inbound Emails

Before I conclude this article I’d like to briefly discuss troubleshooting problematic inbound email accounts. For those scenarios where “Test Settings” is failing the following steps should help identify any problems:

These steps assume you have entered all required fields and when pressing “Test Settings” a pop-up window appears informing you that the connection attempt has failed.

1. Leave the email settings window open
2. In a new tab or window set the logging level to debug

3. Switch back to the email settings window
4. Click Test Settings again

Retrieve the sugarcrm.log file (as described in the article referenced earlier)

Look for the following statements:

```
Thu Jun 18 14:17:55 2009 [240][1][DEBUG] -----STARTING FINDOPTIMUMS LOOP-----
----
Thu Jun 18 14:17:55 2009 [240][1][DEBUG] 1: I-E testing string:
{mail.server.com:110/service=pop3/notls/novalidate-cert/secure}INBOX
Thu Jun 18 14:17:55 2009 [240][1][DEBUG] 1: I-E failed using
[{{mail.server.com:110/service=pop3/notls/novalidate-cert/secure}INBOX}] - error: Can't do
secure authentication with this server
Thu Jun 18 14:17:55 2009 [240][1][DEBUG] 1: I-E clearing error and alert stacks.
Thu Jun 18 14:17:55 2009 [240][1][DEBUG] 2: I-E testing string:
{mail.server.com:110/service=pop3/notls/novalidate-cert}INBOX
Thu Jun 18 14:17:56 2009 [240][1][DEBUG] 2: I-E found good connect using
[{{mail.server.com:110/service=pop3/notls/novalidate-cert}INBOX}]
Thu Jun 18 14:17:56 2009 [240][1][DEBUG] 2: I-E clearing error and alert stacks.
Thu Jun 18 14:17:56 2009 [240][1][DEBUG] -----end FINDOPTIMUMS LOOP-----
```

2.1.20 Summary

A quick recap:

1. Emails are accessed from email servers by personal or group accounts
2. Emails are archived into SugarCRM by placing them in folders
3. Admins can automate the process of archiving emails from group accounts into group folders
4. Admins can auto-create cases from emails imported from group accounts into group folders

Access Developer Tools and Studio

2.1.21 Introduction

The Developer Tools and Studio allow you to make basic customisations to the Sugar user interface by editing the module tabs, layouts, subpanels, fields and labels to align with your business and processes. You must be logged in as the system administrator to access the Developer Tools and Studio.

With Developer Tools you can edit the Sugar user interface with the following tools:

- **Studio**
- Fields
- Labels
- Drop-down Lists
- Layouts
- Subpanels

- **Dropdown Editor**
- **Configure Group Tabs**
- **Rename Tabs**

2.1.22 Accessing Developer Tools and Studio

The Developer Tools section and Studio are available from the Administration: Home page.


Follow these steps to access the Developer Tools section and Studio:

- Studio
- Fields
- Labels
- Drop-down lists
- Layouts
- Subpanels
- Dropdown Editor
- Configure Tabs
- Configure Group Tabs
- Rename Tabs

2.1.23 Accessing Developer Tools and Studio

The Developer Tools section and Studio are available from the Administration: Home page.

Follow these steps to access the Developer Tools section and Studio:

Step	Action
1	Login to Sugar with your administrator login and password.
2	<p>Click the Admin system link in the top right corner.</p>  <p>Result: The Administration: Home page displays.</p>
3	Scroll to the Developer Tools section. Observe all the tools available in the

Developer Tools section. See the table below for editing tool details.

Developer Tools		
Create and edit modules and module layouts, manage standard and custom fields, configure tabs, and define workflows:		
Studio	Edit Dropdowns, Custom Fields, Layouts and Labels	Portal
Module Builder	Build new modules to expand the functionality of SugarCRM	Sugar Portal
Module Loader	Add or remove Sugar modules, themes, and language packs	Configure Tabs
Dropdown Editor	Add, delete, or change the dropdown lists in the application	Configure Group Tabs
Workflow Management	Manage workflow conditions, alerts and actions	Rename Tabs

Notes:

- Click any desired developer tool link name to access it.
- Module Builder, Sugar Portal Editor and Dropdown Editor are also available from
- the Studio home page.

Click Studio to access Studio and use the module editing tools.

Result: The Studio home page displays.

Editor	Description
Studio	Allows you to create and edit fields, dropdown lists, layouts and labels for modules.
Dropdown Editor	Allows you to create and manage custom and standard dropdown lists.
Configure Tabs	Allows you to hide, display and change the order of module tabs.
Configure Group Tabs	Allows you to group and organise module tabs and display them in groups in the user interface instead of individually.
Rename Tabs	Allows you to rename module tabs.

Create and Manage Drop-down Lists

2.1.24 Introduction

Use Studio to create custom drop-down lists for any module in Sugar with the Dropdown Editor. You can also edit existing standard and custom drop-down lists. You must be logged in as the system administrator to access the Dropdown Editor.

2.1.25 Dropdown Editor Overview


The Dropdown Editor allows you to access a list of all drop-downs in Sugar. You can create new drop-downs and edit existing drop-down lists for dropdown, multiple select and radio buttons field data types.

You can access the DropDown Editor from the Developer Tools section on the Administration: Home page; the Dropdown Editor tab at the bottom of the page in Studio; and from the Field Editor right-hand pane when editing fields in Studio.

2.1.26 Creating Dropdown Lists

After you create a drop-down list, it is available to select and use when creating a new custom field or editing an existing drop-down field in the Edit Fields tool.

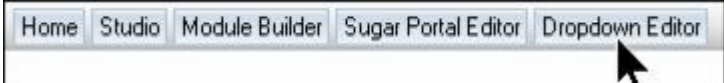

Follow these steps to access the Dropdown Editor and create a new drop-down list.

Step	Action
1	<p>From the Admin page Developer Tools section, click Dropdown Editor, OR From the Studio page, click the Dropdown Editor tab at the bottom of the page.</p>  <p>Result: The Dropdown Editor page displays, with a list of all existing drop-downs in the left Dropdowns pane and middle Dropdown Editor pane.</p> <p>Note: The Dropdowns and Dropdown Editor panes display an identical list of drop-downs in alphabetical order. You can access a drop-down list from either pane.</p>
2	<p>From the Dropdown Editor page, click Add Dropdown.</p> <p>Result: The Dropdown Editor tab displays in the right-hand pane with fields to create a new drop-down list.</p>
3	<p>On the Dropdown Editor tab in the right-hand pane, specify the name of your drop-down list in the Dropdown Name field box.</p> <p>Notes:</p> <ul style="list-style-type: none"> • The Dropdown Name is how you will identify your drop-down list when creating a custom field with a data type of dropdown, multiple select or radio buttons. • The system automatically appends <i>_list</i> to your drop-down name as a way to identify the data type in the database. You can use your own data type naming convention if desired.
4	<p>Select the drop-down language from the Dropdown Language menu.</p> <p>Note: A list of all languages for language packs installed in your Sugar instance will appear.</p>
5	<p>To create each drop-down value, specify the Item Name and Display Label and then click the Add button beneath the Item Name field box.</p> <p>Notes:</p>

	<p>The Item Name is how the value is represented in the database. This value should not contain</p> <ul style="list-style-type: none"> •special characters or spaces. <p>The Display Label is how the value displays in the user interface in the drop-down menu and can</p> <ul style="list-style-type: none"> •include special characters and spaces. <p>You must click the Add button to create each drop-down value including the final value in the drop-</p> <ul style="list-style-type: none"> •down list.
6	<p>Click Save to save the drop-down list.</p> <p>Result: The drop-down list is saved and added to the alphabetical list of Dropdowns in the left-hand and middle panes of the Dropdown Editor.</p>

2.1.27 Editing Custom and Standard Dropdown Lists

The Dropdown Editor allows you to edit standard and custom dropdown lists. All existing drop-down lists display alphabetically and can be accessed from the Dropdown Editor. Follow these steps to edit a drop-down list.

Step	Action
1	<p>From the Studio page, click the Dropdown Editor tab at the bottom of the page.</p> <p>Result: The Dropdown Editor page displays.</p> 
2	<p>From the Dropdown Editor page, click the drop-down name you wish to edit.</p> <p>Result: The Dropdown Editor form displays in the right-hand pane with the selected drop-down's values.</p> 
3	<p>To edit a value, click the pencil editing icon next to the desired drop-down value to access the field box and enter your changes.</p>

	<p>Note: If you are unable to see the icons to the right of the Dropdown Items, hover your mouse over the Dropdown Editor left column pane and drag the column to the left to expand it until the icons appear.</p>
4	<p>To delete a value, click the trashcan icon next to the desired drop-down value.</p> <p>Note: If the value was selected for a record in the user interface, the data will be deleted and the record will reflect no selection for the drop-down field.</p>
5	<p>To add a new value, enter the new name and value in the corresponding field box at the bottom of the list and click the Add button.</p>
6	<p>To reorder the values, drag and drop the drop-down value field boxes to the desired location in the list.</p>
7	<ul style="list-style-type: none"> •Click the Undo button to revert to the previous edit. •Click the Redo button to redo the edit. <p>Note: You can use the Undo and Redo buttons until the changes to the drop-down list are saved.</p>
8	<p>Click the Save button to save your changes.</p> <p>Result: The changes are saved and the drop-down list values are updated in Studio and the Sugar user interface immediately.</p>

Create and Manage Fields

2.1.28 Introduction

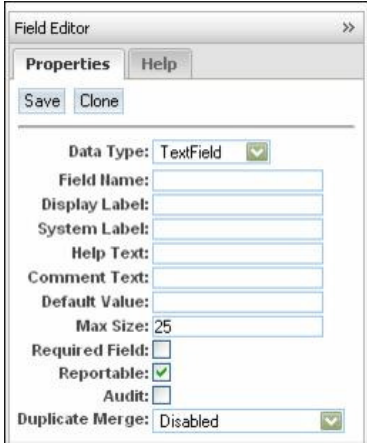
Use Studio to create, edit, and delete custom fields and change the labels of default fields. You must be logged in as the system administrator to edit fields with Studio.

2.1.29 Creating Custom Fields

You can create different types of custom fields for standard and custom modules. After you create the custom field, you must add it to the desired module layout.

Follow these steps to create a custom field.

Step	Action
1	<p>From the Studio page, click the module you wish to edit.</p> <p>Result: The module's Edit page displays.</p>
2	<p>From the module's Edit page, click Fields.</p> <p>Result: The Edit Fields page displays with a list of all custom and default fields for the module.</p>
3	<p>From the Edit Fields page, click the Add Field button.</p>

	<p>Result: The Field Editor form displays in the right-hand pane.</p> 
4	<p>Complete the appropriate fields for the custom field. See the table below for details of data type and key fields.</p> <p>Notes:</p> <ul style="list-style-type: none"> •The data type selection modifies which fields display to create a new custom field. •The dropdown, multiple select and radio buttons data types require a drop-down list selection which must be created first using the DropDown Editor.
5	<p>Click the Save button to create the field.</p> <p>Results:</p> <ul style="list-style-type: none"> •The table for the data is created in the database. •The custom field is created and displays in the Edit Fields page Custom list. <p>The new custom field is now available to use to add to the module's layouts. It displays in the Toolbox for the EditView, DetailView and QuickCreate layouts. It displays in the Hidden Column for the ListView, Basic Search, Advanced Search and Subpanels layouts.</p> <p>Note: You must now add this field to the desired layout for the selected module.</p>

Field	Description
Data Type	<p>From the drop-down list, select the custom field data type:</p> <ul style="list-style-type: none"> •Address: •Checkbox: Creates a checkbox for data fields with a yes/no action; end users may turn on or off a checkbox by clicking the box. •Currency: Creates a field to enter a currency. •Date: Creates a field to enter a date; calendar icon displays to the right of field. End user may enter a date manually in the proper date format locale setting or click the calendar icon to select a date from the calendar. •Dropdown: Creates data fields containing a drop-down list of values; end user may select one value. •Decimal: Creates a field to specify the precision past the decimal point. •HTML: Creates an HTML field to add HTML snippets to display for the end user. •Integer: Creates a field to specify positive or negative numbers. You can specify a range with the min and max value fields. •MultiSelect: Creates data fields containing a drop-down list of values;

	<p>end user may select one or more values. Not available in the Module Builder.</p> <p>Flex Relate: Creates a drop-down list to specify a module to relate to. Displays only if the module does not currently contain a Flex Relate field.</p> <p><i>Example:</i> Relate a contact record to another record in Sugar. Add and deploy the flex relate field in the Contacts module edit view and detail view. Users can select the module and record to relate to from the contact record's edit view and then access the related record from the contact record's detail view.</p> <ul style="list-style-type: none"> •Phone: Creates a field to enter a phone number. •Radio: Creates data fields containing a list of values; end users may select one value by clicking the button to the left of the value. •Relate: Creates a field to relate a module record with another record. •TextArea: Creates a text field for unlimited text data fields. •TextField: Creates a text field for fields such as first name and last name.
Field Name	<p>Enter a name; this is how it is stored in the database. When the custom field name displays in the Custom section of the Edit Fields page, a "_c" is automatically appended because it maps to the database.</p> <p><i>Important:</i> Do not use spaces or special characters.</p>
Display Label	<p>Enter the display label; this is how it displays in the Sugar user interface.</p>
System Label	<p>Note that the system label auto-populates. You can enter a new value if needed.</p> <p><i>Note:</i> This is the system label for the field and how it displays in the module's Edit Labels page in Studio.</p>
Help Text	<p>Enter descriptive or instructional text if desired; this text will display when the user points the cursor at the field.</p>
Comment Text	<p>Enter your own notes about the field you are creating; this does not display to the end user.</p>
Default Value	<p>Enter a default value for the data field if desired; value displays automatically in the detail and edit views.</p>
Max Size	<p>For text data fields; enter the maximum number of characters the end user can enter in the field.</p>
Required Field	<p>Check this box to specify that users must enter a value for the field. A red asterisk will display to the right of the field label in the edit view. End user may not save record until a value is entered in the field.</p>
Reportable	<p>By default, this box is selected to enable you to specify this field when you run reports.</p>
Audit	<p>Check this box to add the field to the View Change Log to audit any changes in the edit view or detail view.</p>

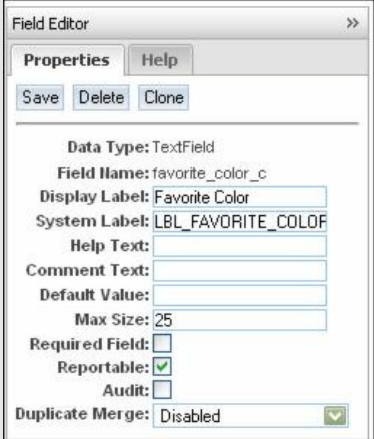
Duplicate Merge	<p>From the drop-down list, specify one of the following options for the Duplicate Merge functionality on a record's detail page.</p> <ul style="list-style-type: none"> Enabled: The field can be used as a filter, and will be a default filter field. Disabled: This field cannot be selected as a filter. In filter: This field will be available to be used as a default filter. Default Selected Filter: This is a filter field by default. Filter Only: This field can be selected as a filter to search for identical fields during a duplicate merge operation. However, you cannot merge the values into a single field.
Precision	For decimal data fields; enter a number to specify the number of digits to the right of the decimal point.
Min Value	For integer data fields; enter a number to specify the minimum value allowed.
Max Value	For integer data fields; enter a number to specify the maximum value allowed.
Mass Update	For DropDown or Date field data types. Adds the field to the module's mass update section in the detail view.
Drop Down List	<p>For DropDown, MultiSelect and Radio field data types. Select the name of the drop-down list you want to display.</p> <ul style="list-style-type: none"> Click the Edit button to modify the current drop-down list. Click the Add button to create a new drop-down list from the Field Editor.
HTML	For HTML data fields; enter html code in this box to create a message to display in the Sugar user interface.

2.1.30 Editing Custom and Default Fields

The Field Editor allows you to edit some properties of custom fields and change the display label of default fields. The Edit Fields page displays custom fields in the Custom section and default fields in the Default section.

Follow these steps to edit a field.

Step	Action
1	Follow steps 1 - 2 above.
2	<p>From the Edit Fields page, click the field name you want to edit.</p> <p>Result: The field properties display in the Field Editor Properties tab in the right-hand pane.</p> <p>Notes:</p> <ul style="list-style-type: none"> For custom fields, the Data Type and Field Name (database value) are not <ul style="list-style-type: none"> •editable. For default fields, only the Display Label is editable.

	
3	Enter the desired changes for the field properties.
4	Click the Save button to save your changes. <i>Result:</i> The changes are saved, the field properties are updated in Studio and the Sugar user interface immediately.

2.1.31 Deleting Custom Fields

The Field Editor also allows you to delete custom fields. You cannot delete default fields. Use the Layout Editor to remove an unwanted default field from a layout.

Follow these steps to delete a custom field.

Step	Action
1	From the Studio page, click the module you wish to edit. <i>Result:</i> The module's Edit page displays.
2	From the module's Edit page, click Fields . <i>Result:</i> The Edit Fields page displays with a list of all custom and default fields for the module.
3	From the list of custom fields, click the field name you wish to delete. <i>Result:</i> The field properties display in the Field Editor Properties tab in the right-hand pane.
4	Click the Delete button to delete the custom field. <i>Result:</i> A popup window displays <i>"Deleting a custom field will delete all the data related to the custom field. You will still need to remove the field from any layout you have added it to"</i> Click Cancel to retain the custom field. OR Click OK to delete the custom field. <i>Result:</i> The custom field is deleted from the module's Edit Fields page; the Toolbox for the EditView, DetailView and QuickCreate layouts; and the Hidden Column for the ListView, Basic Search, Advanced Search and Subpanels layouts. <i>Important:</i> You must remove the custom field from any layout you have added it to in the user

interface. All data related to the custom field will be deleted and it will not retain any new values entered.

Edit Labels

2.1.32 Introduction

Use the Label Editor in Studio to view and edit all labels for a module. You must be logged in as the system administrator to access Studio.

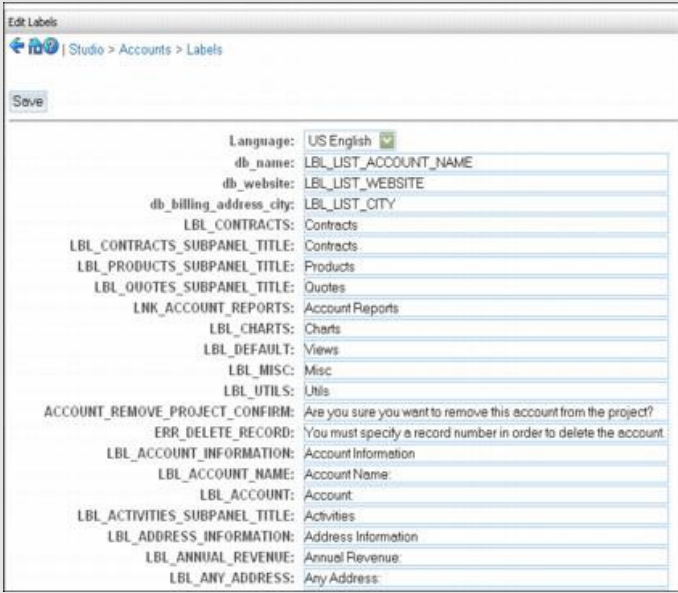
2.1.33 Label Editor Overview

Use the Label Editor to access a list of all labels for a module including field labels, button labels, link labels, module titles and pop-up window messages. Each module list displays the database fields and the labels they map to in the user interface.

Best Practice: Use the Label Editor rather than the Layout Editor to edit multiple labels for a module as a best practice to reduce the amount of time and clicks to make your edits.

2.1.34 Editing Labels

Follow these steps to edit a label for a module.

Step	Action
1	<p>From the Studio page, click on the desired module icon to select a module to edit.</p> <p>Result: The desired module's Edit page displays with a list of components to edit.</p>
2	<p>On the Edit page; click the Labels icon.</p> <p>Result: The Edit Labels page displays.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;">  </div>

3	<p>Select the desired language pack from the Language drop-down list to access the language pack field labels you wish to edit.</p> <p>Note: You must install language packs for them to be available in this drop-down.</p>
4	<ul style="list-style-type: none"> •Click directly in the label field box you wish to edit to make your changes. •Type the desired text in the field label box. <p>Continue editing each field label as needed until you have made all desired edits.</p>
5	<p>Click the Save button to save and publish the changes to the user interface.</p>

Edit Layouts

2.1.35 Introduction

Use Studio to edit layouts by adding, removing and organising fields and rows to make basic customisations to layouts in Sugar. You must be logged in as the system administrator to access Studio.

2.1.36 Layout Types

There are five different layout types within most modules that you can customise in Studio by editing, adding and removing fields and rows.

- List View:** Displays a filtered list of records on the module home page based on search criteria
 - the list of records you see when you access a module
- Detail View:** Displays the record data
 - the first view you see when you access a record
- Edit View:** Contains fields for editing record data
 - this is where you may change field values for a record
- Quick Create:** Displays when you click the Create button in a subpanel
 - a short form to create and relate a new record from the detail view
- Search:** Provides search parameters which filter records and determine what appears in the list view
 - the basic and advance search forms can both be customised

Important: While the detail and edit views look similar, they are different layouts and each must be customised individually in Studio.

2.1.37 Accessing the Layout Editor

The Layout Editor provides layout links to access the different layouts for a module.

Follow these steps to access the Layout Editor:

- From the Studio page, click the **module** you wish to edit.

Result: The module's **Edit** page displays.

- On the module's Edit page, click **Layouts**.

Result: The module's **Layouts** page displays with a list of layouts to edit.

Example: The Accounts Layouts page appears below.



2.1.38 Editing the Detail View, Edit View and Quick Create Layouts

Use the toolbox drag and drop functionality and the layout staging area to add and remove panels, rows and fields in the detail view, edit view and quick create layouts.

Use the **Save** and **Save & Deploy** buttons to save changes within Studio and deploy changes to the user interface.

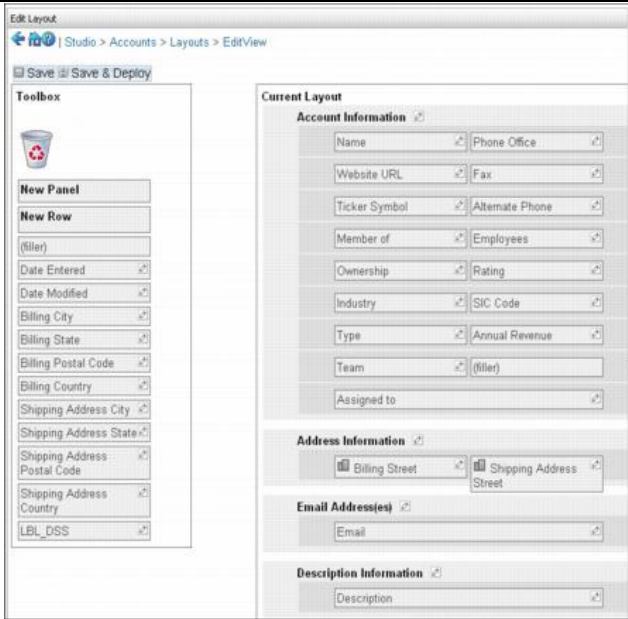
- Click the **Save** button to save changes in the Studio layout stage area only.
- Click the **Save & Deploy** button to save changes in the Studio layout stage area and deploy the new
- layout to the user interface.

Important: While the detail and edit views look similar, they are different layouts and each must be customised individually in Studio.

2.1.39 Adding Fields

The Toolbox displays fields that are not in the current layout. Drag and drop functionality allows you to add these fields to the detail view, edit view and quick create layouts. Follow these steps to add fields to the desired layout.

Step	Action
1	<p>From the selected module's Layouts page, click EditView, DetailView or QuickCreate from the icons or module file tree.</p> <p>Result: The desired layout view staging area displays.</p> <p>Example: The Accounts EditView layout staging area appears below:</p>

	
2	<p>To add a field to the layout, click on the desired data field in the Toolbox and then drag and drop the data field to a (filler) data field or existing data field in the layout staging area.</p> <p>Result: The desired field displays in the new location and the (filler) data field or existing data field displays in the Toolbox.</p>
3	<p>To reorganise fields in the layout, click the desired data field in the layout staging area and then hold down the mouse button until the field box is gray. Drag and drop the data field to a (filler) data field or existing data field.</p> <p>Result: The desired field displays in the new location and the (filler) data field or existing data field displays in the previous location of the desired field.</p>
4	<ul style="list-style-type: none"> •Click the Save button to save your changes to the staging area only. OR Click the Save & Deploy button to save your changes and deploy the new layout. <p>Note: Saving your changes to the staging area allows you to save your work, leave Studio, and then come back at any time to add more edits and then Save & Deploy when you are finished.</p> <p>Best Practice: Make changes to a module in the staging area only with the Save button and then use Save & Deploy when the layout changes for the module are complete.</p>

2.1.40 Removing Fields

The Toolbox drag and drop functionality allows you to remove fields from the detail view, edit view and quick create layouts. Follow these steps to remove fields from the desired layout.

Step	Action
1	From the selected module's Layouts page, click DetailView , EditView or QuickCreate from the icons or module file tree.


	Result: The desired layout view staging area displays.
2	To remove a field from the layout, drag and drop the data field to the Toolbox trashcan . Result: The field remains available for future use in the Toolbox.
3	<ul style="list-style-type: none"> •Click the Save button to save your changes to the staging area only. OR •Click Save & Deploy to save your changes and deploy the new layout. <p>Note: Saving your changes to the staging area only allows you to save your work, leave Studio, and then come back at any time to add any changes and then Save & Deploy.</p>

2.1.41 Editing Existing Field Labels

Edit existing field labels for the layouts directly from the field boxes in the layout staging area.

Best Practice: To reduce the amount of time and clicks to make your edits, use the Label Editor rather than the Layout Editor to edit multiple labels at one time for a module.

Follow these steps to edit existing field labels in the desired layout.

Step	Action
1	From the selected module's Layouts page, click DetailView , EditView or QuickCreate from the icons or module file tree. Result: The desired layout view staging area displays.
2	<p>In the layout view staging area</p> <ul style="list-style-type: none"> •Click the pencil editing icon within the field label box if you are using Mozilla Firefox. OR •Click directly within the field label box if you are using Internet Explorer.  <p>Result: The Properties tab displays with the existing field label text in the Label field box in the right pane.</p>
3	Type the desired text in the Label field label box on the Properties tab and then click the Save button.

	Result: The field label box in the layout staging area displays the new text.
4	<ul style="list-style-type: none"> •Click the Save button to save your changes to the staging area only. OR •Click Save & Deploy to save your changes and deploy the new layout.

2.1.42 Adding Panels and Rows

The Toolbox drag and drop functionality allows you to add panels and rows to the detail view, edit view and quick create layouts. Adding panels will add a new section with a row and empty fields to the layout that you can add a title and fields to. Adding rows will add empty field boxes that act as fillers for adding additional data fields to or for creating blank space in the layout for organisation purposes.

Follow these steps to add panels and rows to the desired layout.

Step	Action
1	From the selected module's Layouts page, click DetailView , EditView or QuickCreate from the icons or module file tree. Result: The desired layout view staging area displays.
2	To add a panel or row to the layout, drag and drop the panel or row to the desired location in the layout staging area.
3	To modify the new panel label, click the edit pencil icon next to the panel title name. Result: The new panel properties display in the Properties tab in the right-hand pane. Type the desired panel title in the Label field label box on the Properties tab •and then click Save . Result: The field label box in the layout staging area displays the new title.
4	<ul style="list-style-type: none"> •Click the Save button to save your changes to the Studio staging area. Click the Save & Deploy button to save your changes and deploy the new layout to the user interface. Notes: A field must be added to the new panel in order for the panel to display in the user interface. The field tabbing order must be updated after adding rows to the edit view layout. Follow the steps below in the Editing the tabbing order section to edit the tabbing order.

2.1.43 Removing Panels and Rows

The Toolbox drag and drop functionality allows you to remove panels and rows from the detail view, edit view and quick create layouts.

Follow these steps to remove panels and rows from the desired layout.

Step	Action
1	From the selected module's Layouts page, click DetailView , EditView or QuickCreate from the module icons or file tree. <i>Result:</i> The desired layout view staging area displays.
2	To remove a panel or row from the layout drag and drop the desired panel or row to the Toolbox trashcan .
3	<ul style="list-style-type: none"> •Click the Save button to save your changes to the Studio staging area. Click the Save & Deploy button to save your changes and deploy the new layout to the user interface.

2.1.44 Editing the Tabbing Order

You can modify the order that users tab through fields in the edit view with the Properties tab. The numbers assigned to each field determine the order users will tab from field to field on the page.

Follow these steps to edit the tabbing order in the edit view.

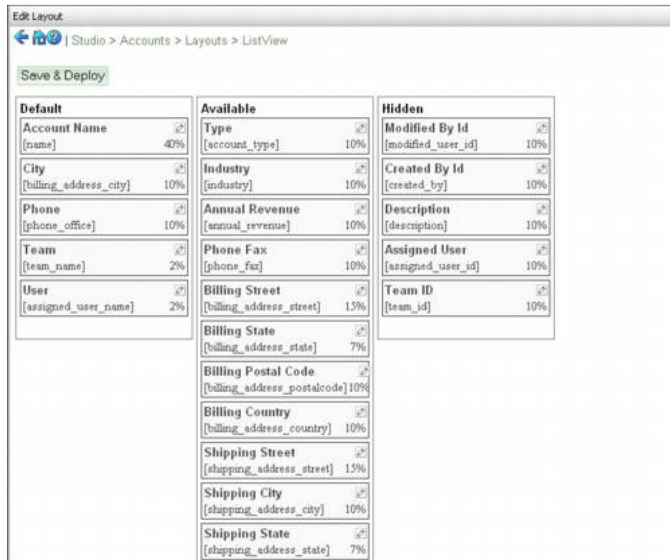
Step	Action
1	From the selected module's Layout page, click EditView from the module icons or file tree. <i>Result:</i> The edit view layout staging area displays.
2	In the layout staging area locate the field you wish to edit the tabbing order for and click the edit pencil icon in the field box. <i>Result:</i> The Properties tab displays to the right. <i>Note:</i> The default tabbing order is from left top to bottom and then from right top to bottom within each panel.
3	Type the new number that represents the desired tabbing order in the Tab Order field box. <i>Note:</i> The users will tab from left to right through all fields numbered "1", then from left to right through all fields numbered "2", and so on.
4	<ul style="list-style-type: none"> •Click the Save button to save your changes to the staging area only. OR Click Save & Deploy to save your changes and deploy the new layout to the user interface.

2.1.45 Editing the List View and Search Layouts

You can customise the list view and search layouts by adding, removing and reorganising fields in the Layout Editor. Drag and drop the fields to the Default, Available and Hidden columns to determine where the fields will display. Adjust the field width in the list view to determine the field column spacing.

- The **Default** column contains fields that display in the default list view.
- The **Available** column contains fields that end users may use to create a custom list view with Saved Search & Layout. It is not used with the search list view.
- The **Hidden** column contains fields that the administrator can add to the Default or Available columns.
- Fields in this column are not available to end users to customise a saved search list view.

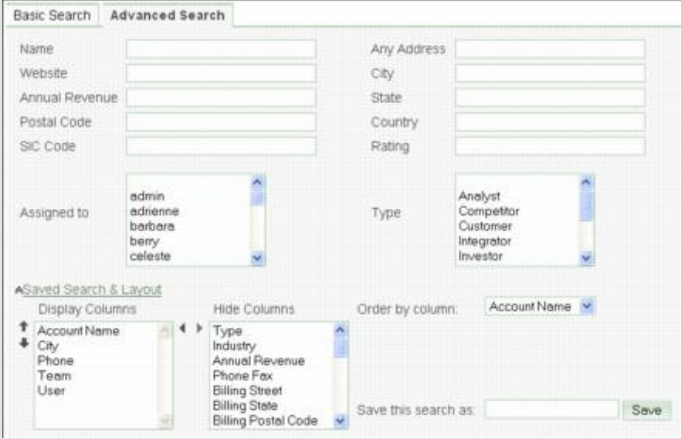
Example: The Accounts List View layout appears below.



2.1.46 Adding, Removing and Reorganising Fields

Follow these steps to add, remove, reorganise fields and adjust the column width in the desired list view or search layouts:

Step	Action
1	<p>From the selected module's Layouts page, click ListView or Search from the module icons or file tree.</p> <p>Result: The List View Editor page displays.</p>
2	<p>To add or remove fields: Hover over the desired data field in the column it is currently located until the mouse SizeAll bars display.</p>

	<p>Hold down the mouse button and then drag and drop the data field to the •desired location in the Default, Available or Hidden column.</p> <p>Important: Users can use fields in the Available column to customise their saved search layouts in the user interface. The Available field columns are represented in the module’s Advanced Search tab in the Hide Columns list of the Saved Search & Layout section.</p> 
3	<p>To reorganise fields:</p> <ul style="list-style-type: none"> • Hover over the data field you wish to move in the desired column until the mouse SizeAll bars display. • Hold down the mouse button and then drag and drop the data field to the •desired location within the column.
4	<p>To adjust the field column width in the list view:</p> <ul style="list-style-type: none"> • Click the edit pencil icon for the label field box that you want to adjust the width. -The % number below the edit pencil icon represents the current field width. <p>Result: The Properties tab displays to the right with the existing width in the Width field box.</p> <ul style="list-style-type: none"> • Type the desired width in the Width field box. • Click the Save button. <p>Result: The new width displays in the label field box in the staging area.</p> <p>Note: The width percentage represents the width of that specific column, not the entire width of the list view.</p>
5	<p>Click the Save & Deploy button to save and deploy the changes to the user interface.</p>

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