User Manual

Compatibility

- 8.0 to 9.2 (On demand compatible)

Contents

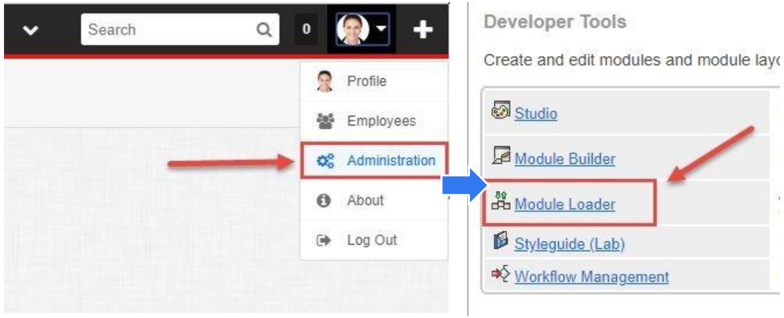
Pre-requisites

1. A SugarCRM instance of a compatible version
2. RT SugarBoards package and a license key from SugarOutfitters

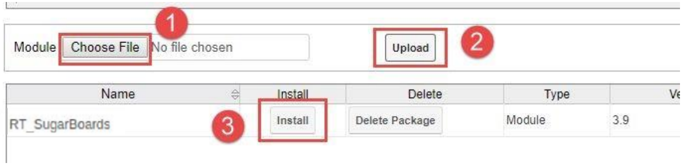
Questions? See the FAQs page

Installation

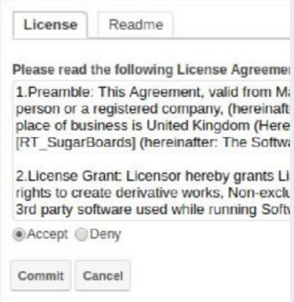
1. Go to the **Module Loader** from the **Administration Panel**



1.1. **Upload** the package (downloaded from SugarOutfitters) and click **Install**

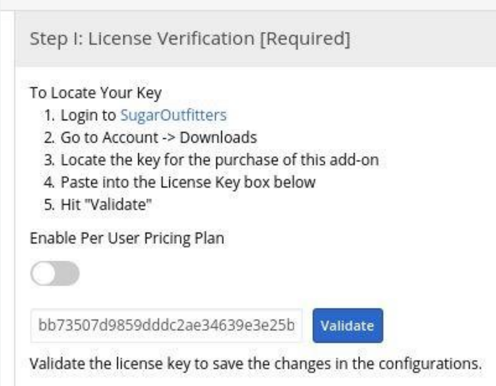


1.2. **Accept** the terms and click **Commit** in order to proceed with the installation.



2. After plugin installation you will be redirected to the license page.

2.1. Enter the license key from SugarOutfitters and click **Validate**



2.2. In order to switch to the **Per User Pricing Plan**, enable the Per User Pricing plan switch and drag and drop the Users from Disabled to Enabled column.

Note: You can click **Enable All** to enable all users at once.

3. Under the License Verification section there is a **Success and Failure Stage Configuration** section that enables you to have Success and Failure drop areas in some of the modules.

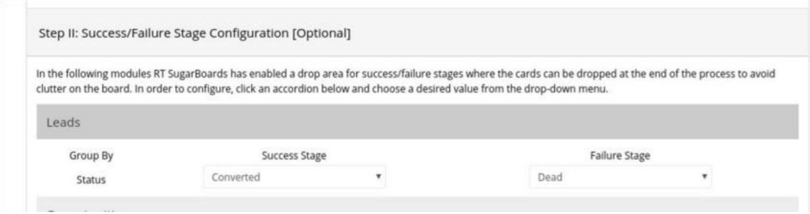
3.1. Expand the accordion with the Module Title

3.2. Select the stage you want as your success or failure stage from the drop downs.

3.3. Click on the Add Group button to add a new group in the board, a dropdown with available fields of the selected Module will appear to choose a field to add a Group for in the board.

3.4. Click on bin icon to remove any group from the board

- Accounts
- Notes



- Calls
- Opportunities
- Cases
- Quotes
- Contacts
- Target Lists

How to use RT SugarBoards?

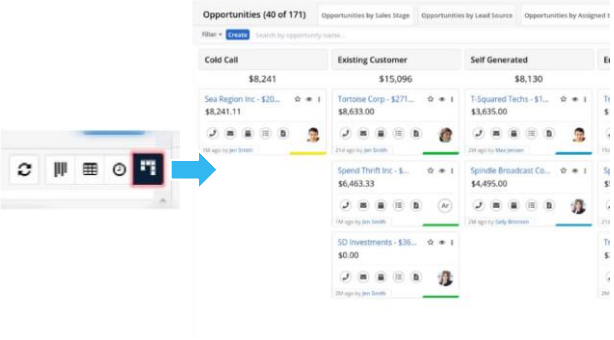
RT SugarBoards offers the following features:

1. A Kanban Board View for Multiple Modules
2. Card View
3. Group By Tabs
4. Tab Personalization
5. Success and Failure stages
6. Detail Preview Panel
7. Drag and Drop
8. Quick Create Activities
9. Quick Edit
10. Favorites
11. Column Summary
12. List View Filters

1. Kanban Board to View for Multiple Modules ● E
   Kanban view to all of the sidecar modules such as;

1.1.
1.2.

Note: RT SugarBoards is also available in your Custom Modules!

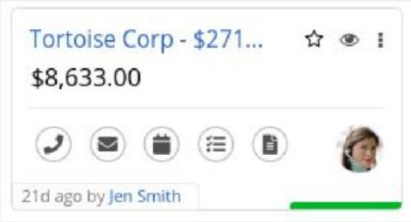


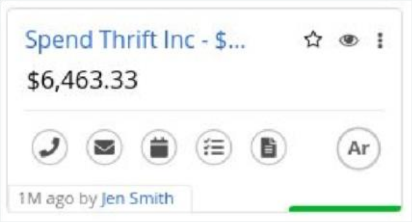
2. Card View

2.1. Each record is represented as Card in the RT SugarBoards View. The Card will have the information:

- Name
- Basic Information (Phone No., Due Date etc)
- Secondary Information (Description etc)
- Header Icons (Preview, and Favorites)
- Edit Menu
- Assigned User Information
- Color Labels based on Lead Source
- Record Modification Information (Time and User)

2.2. The Cards will be in collapsed form by default.





mails ● Targets

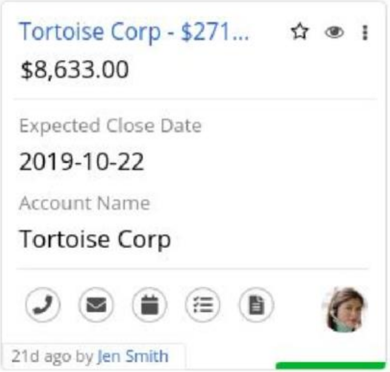
- Leads ● Tasks
- Meetings ● etc

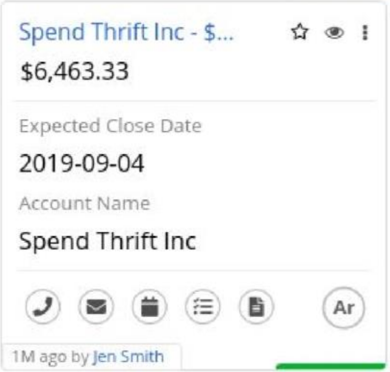
Go to the List View of any of the above modules Click on the RT SugarBoards icon highlighted in the alert

2.3. Click on a Card to expand all cards

a. A card with no Secondary Information will not expand.

Note: The basic and secondary information, and color labels will vary from module to module.



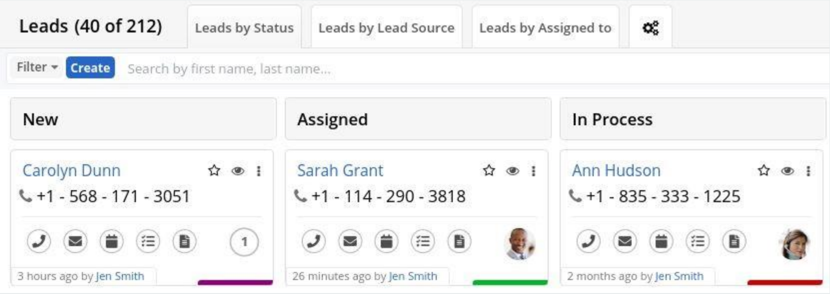


3. Group By Tabs

3.1. RT SugarBoards has sorted the Cards for each Module in different groups by default and presented them as Tabs within the RT SugarBoards View.

3.2. Common Groups would include Assigned Users, and Status Values.

3.3. Each Tab will have a column based on the values of the field the Tab is based on. For instance, a Tab in the Leads Module based on the Status field will be called "**Leads by Status**". The columns in it will be derived from the statuses a Lead can be assigned; like *New, Assigned, In Process etc*.



4. Tab Personalization

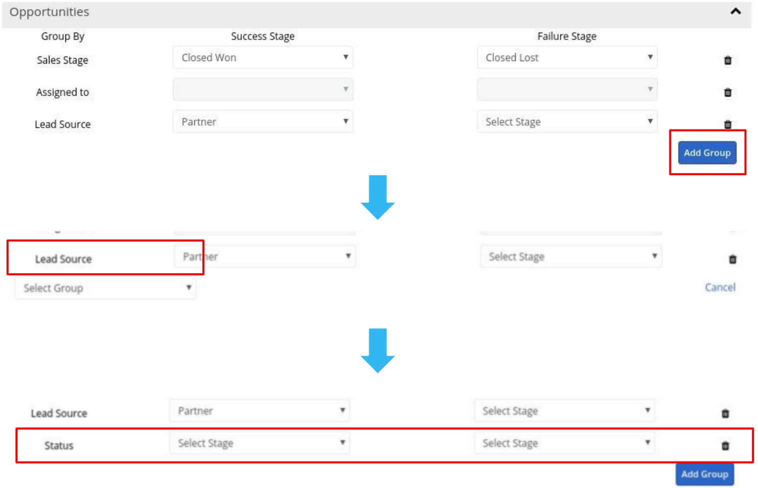
4.1. Go to RT SugarBoards Configuration page or the Settings tab in the board view of a Module

4.2. Expand the module section

4.3. Click on the Add Group button

4.4. Select a field from the dropdown to add a Group for in the board.

4.5. In order to remove a Tab, click on bin icon to remove any group from the board

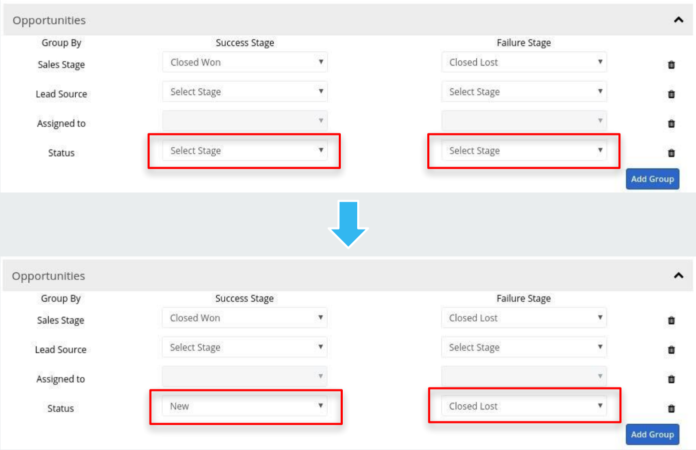


5. Success and Failure Stages

5.1. Every Tab (based on a dropdown field) can have a Success & Failure Stage.

5.2. Some default stages are already configured in RT SugarBoards by default. However, each user can change the stages according to their preference.

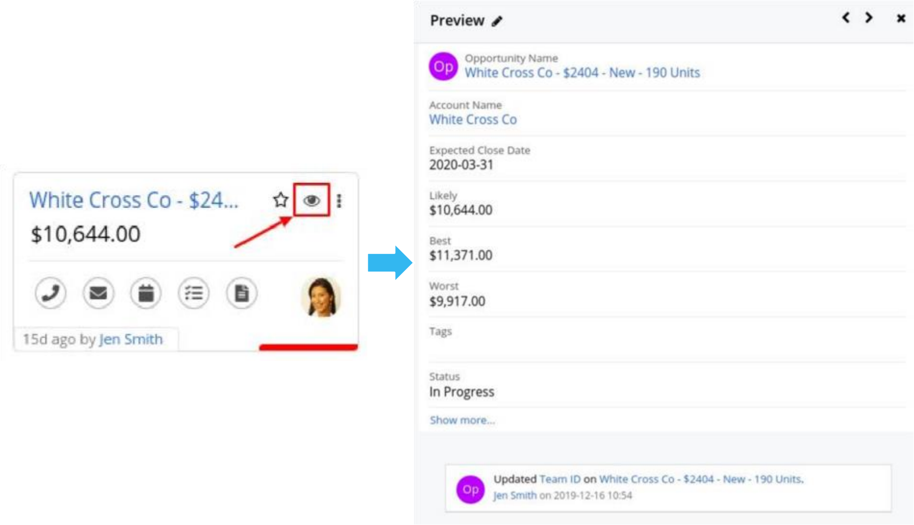
5.3. In order to change a stage, go to the Configuration page or Settings Tab in the Board and choose a stage for any Tab from the dropdown for the Module.



6. Detail Preview Panel

6.1. The Side Pane gets collapsed in the RT SugarBoards View to have an expanded view of the board.

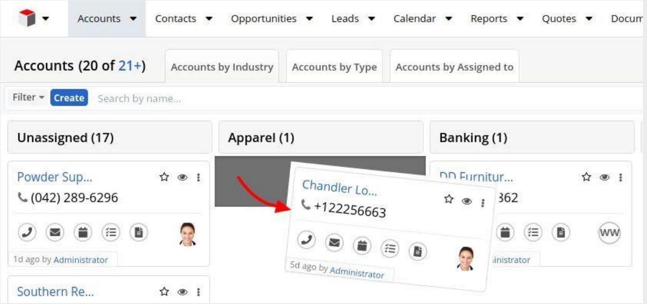
6.2. Just like the List View, clicking on the Preview button on a card will open a detail preview of the card on the side pane.

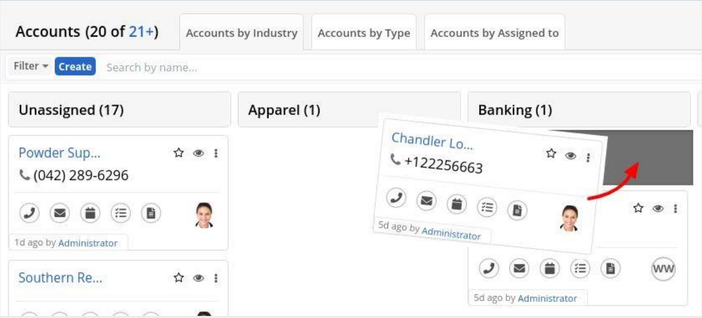


7. Drag and Drop

7.1. The Cards in the RT SugarBoards View can be dragged from one column and dropped into another.

7.2. As the card is dropped into another column, the card values gets updated according to the column value.

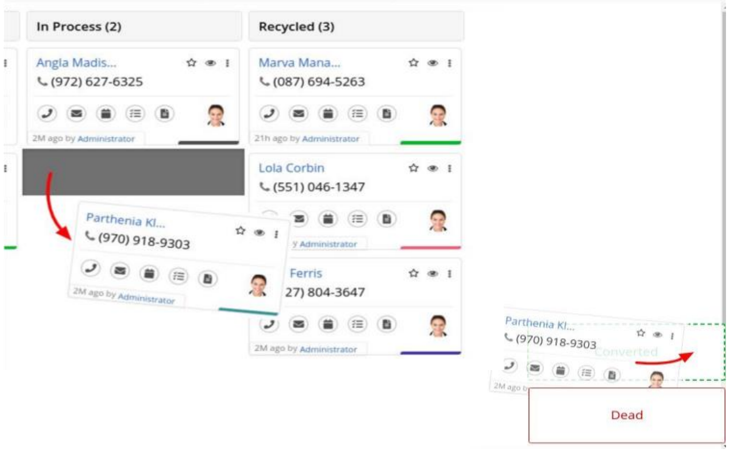




7.3. For certain modules, RT SugarBoards includes a Success and a Failure to help boost the productivity.

7.4. For instance, once a Lead becomes a customer, the conversion from Lead to Account, Contact, and Opportunity can be done by dragging the Card and dropping it in the Success area.

7.5. In case of a lost Opportunity, you can simply drag its Card and drop it in the Dead area.

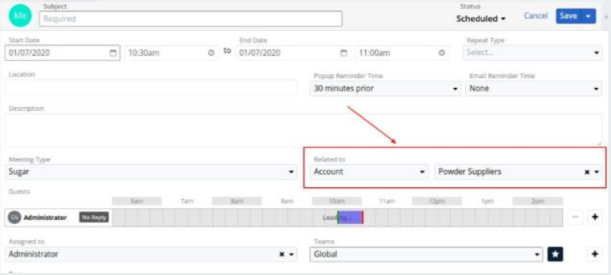


8. Quick Create Activities

8.1. The footer of each Card consists of a band of icons designated to each Activity the Module is related to.

8.2. In order to create an Activity and relate it to a record, just click on the Activity icon on the Card.

8.3. A drawer will open to create the Activity with the Card's link prepopulated in the form.

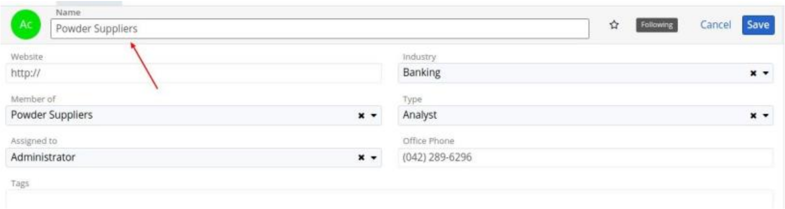


9. Quick Edit

9.1. The RT SugarBoards View provides the users to Edit a record directly.

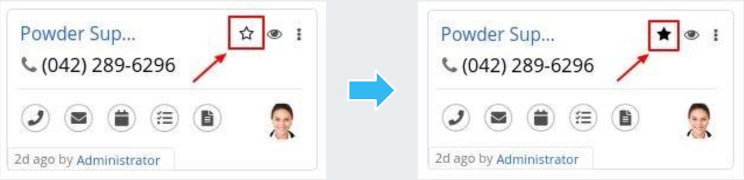
9.2. In order to edit a record, click open the ellipsis menu on a Card and click the Edit option.

9.3. An Edit Drawer will open with the record's information.



10. Favorites

10.1. Records can be marked as Favorites directly from the Cards with just a click on the Favorite (star) icon on the card.



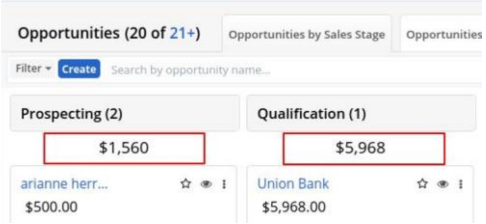
11. Column Summary

11.1. RT SugarBoards provides summaries for each column.

11.2. The Summary is based on the amount recorded in each card of the column.

Notes:

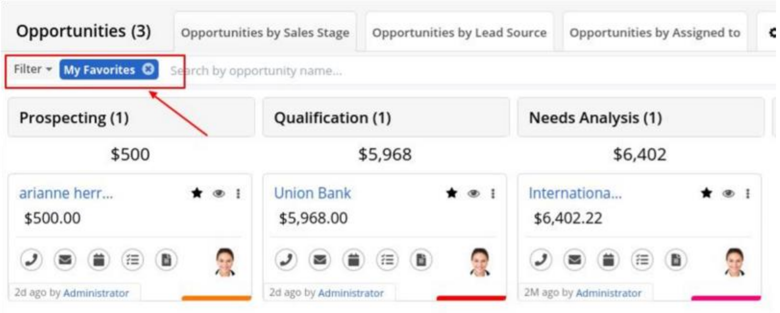
- The feature is available for the Opportunities and Quotes Modules only.
- The sum is made up of all the records currently available in the view.



12. List View Filters

12.1. RT SugarBoards utilizes the List View Filters to filter the view from the clusters of unwanted data.

12.2. Go to the Filter Panel, and create a custom filter or use a predefined one. The results will be displayed in the form of cards under the assigned columns.



Accounts

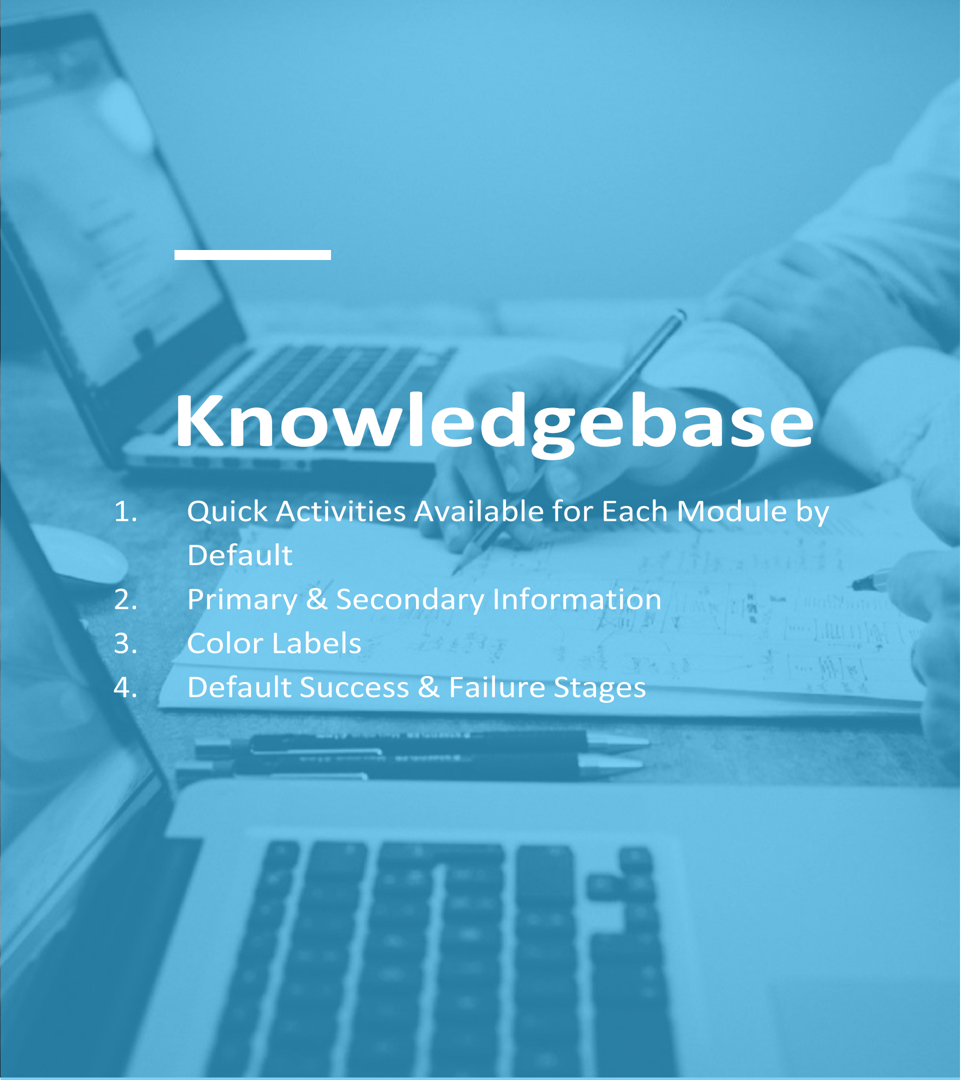
- Calls
- Emails
- Tasks
- Notes
- Meetings

Calls

- Notes

Cases

- Calls
- Emails
- Tasks
- Notes
- Meetings



Knowledgebase

1. Quick Activities Available for Each Module by Default
2. Primary & Secondary Information
3. Color Labels
4. Default Success & Failure Stages

1. Activities Available for each Module

1.1. Contacts

○ Calls ○ Tasks

○ Emails

○ Notes

1.2.

○ Meetings

1.3. Emails

○ Notes

○ Tasks

Leads

1.4.

○ Calls ○ Tasks

○ Emails

○ Notes

1.5.

○ Meetings

1.6.

1.7. Opportunities

- Calls
- Emails
- Meetings
- Tasks
- Notes

1.8. Meetings

- Notes

1.9. Targets

- Calls
- Emails
- Meetings
- Tasks
- Notes

1.10. Quotes

- Calls
- Emails
- Meetings
- Tasks
- Notes

1.11. Target Lists

- Targets

1.12. Tasks

- Notes

Note: Each module will have an activity icon for any of the basic 5 modules if they have a relationship with them.

2. Primary & Secondary Information

2.1. Accounts

- Name
- Phone Number
- Industry
- Type

2.2. Calls

- Subject
- Start Time
- Direction
- Repeat Type

2.3. Cases

- Name
- Case Number
- Account Name
- Status

2.4. Contacts

- Title
- Name
- Contact Number
- Title
- Account Name
- Department

2.5. Emails

- Subject
- Receiver

2.6. Leads

- Name
- Contact Number
- Title
- Description
- Account Name

2.7. Opportunities

- Name
- Likely Amount
- Close Date
- Account Name
- Description

2.8. Meetings

- Subject
- Start Date
- Location
- Repeat Type

2.9. Targets

- Name
- Contact Number
- Title
- Account Name

2.10. Quotes

- Name
- Grand Total
- Email Body
- Time
- Account Name
- Valid Until
- Purchase Order Number

2.11. Target Lists

- Name
- Type
- Total Entries
- Description

2.12. Tasks

- Subject
- Start Date
- Status
- Description

2.13. Notes

- Subject
- Contact Name

- Description
- Date Created

○ Success: Converted ○ Failure: Dead

○ Success: Closed

3. Color Labels

3.1. Calls

- Status

3.2. Cases

- Priority

3.3. Emails

- Email Type

3.4. Leads

- Lead Source

3.5. Meetings

- Status

3.6. Opportunities

- Lead Source

3.7. Tasks

- Priority

4. Success & Failure Stages (Default)

4.1. Leads

- Failure: Rejected

4.2. Cases

- Success: Closed Won
- Failure: Closed Lost

4.3. Opportunities

4.4. Quotes

- Success: Closed Won
- Failure: Closed Lost

Uninstallation

To remove the plugin, go to the **Module Loader** from the Admin Panel and click on the **Uninstall** option in front of the RT SugarBoards package.

Module Loader

The following extensions are installed on this system:

Name	Action	Enable/Disable	Type
RT SugarBoards	Uninstall	Disable	module

Support

If you are unable to get RT SugarBoards to work, here are a few things you can do:

1. See our [FAQs page] or the Installation Video
2. [Create a support ticket] on the SugarOutfitters
3. Drop an email at support@rolustech.com

That's it!

You are ready to use

RT SugarBoards

Got stuck at some point? No problem - see our video guide to installation **here**.

Still having issues? Just drop an email at **support@rolustech.com** and we'll get in touch.