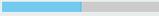


User Manual

Compatibility

- 8.0 to 9.2 (On demand compatible)





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Installation	3
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Support	15

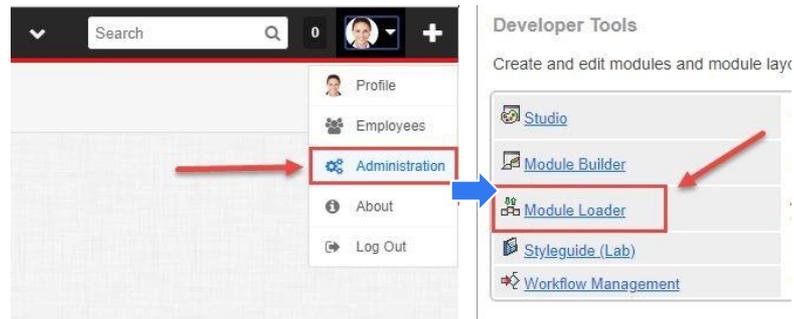
Pre-requisites

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

Questions? See the [FAQs page](#)

Installation

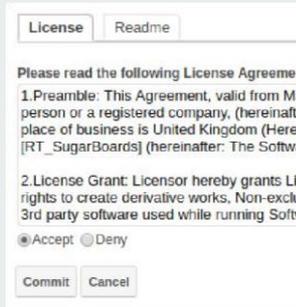
1. Go to the **Module Loader** from the **Administration Panel**



- 1.1. **Upload** the package (downloaded from [SugarOutfitters](#)) and click **Install**

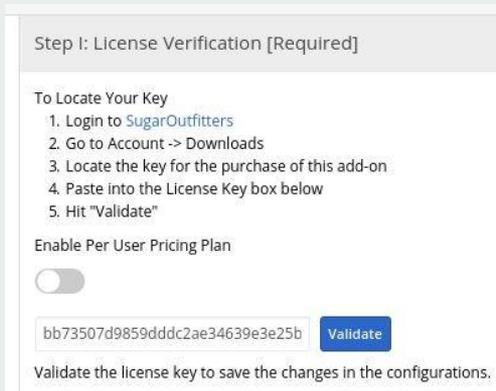


- 1.2. **Accept** the terms and click **Commit** in order to proceed with the installation.



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

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



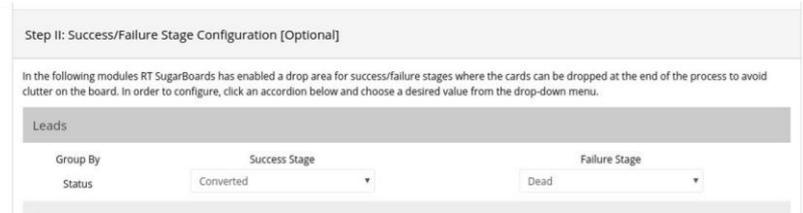
- 2.2. In order to switch to the **Per User Pricing Plan**, enable the Per User Pricing plan switch and drag and drop the Users from Disabled to Enabled column.

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?

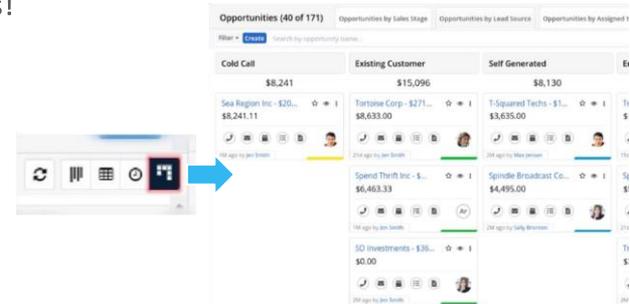
RT SugarBoards offers the following features:

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
 - Kanban view to all of the sidebar modules such as;

- 1.1.
- 1.2.

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

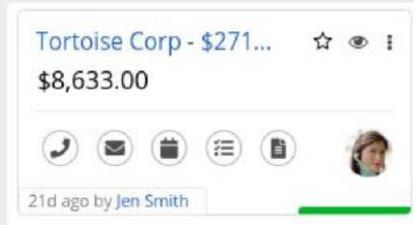


2. Card View

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.

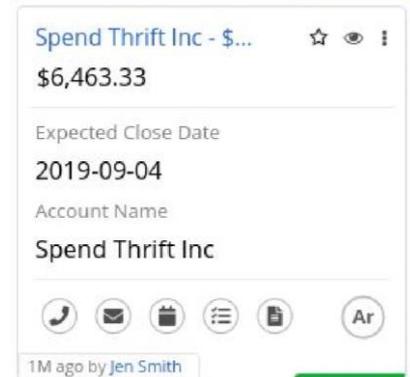
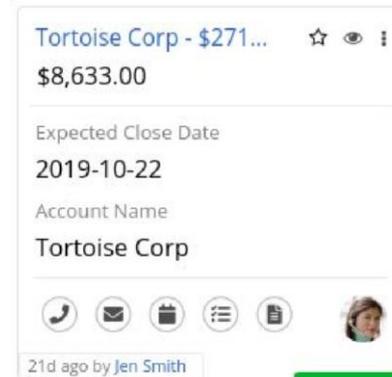


- mails ● Targets
- Leads ● Tasks
- Meetings ● etc

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

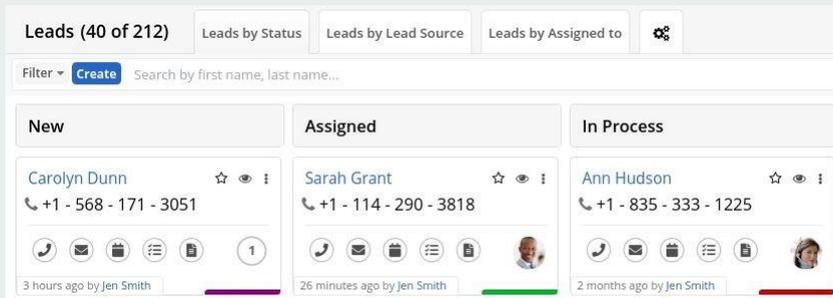
- 2.3. Click on a Card to expand all cards
- a. A card with no Secondary Information will not expand.

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.*



Leads (40 of 212) | Leads by Status | Leads by Lead Source | Leads by Assigned to

Filter Create Search by first name, last name...

New	Assigned	In Process
<p>Carolyn Dunn ☆ 👁 ⋮ 📞 +1 - 568 - 171 - 3051</p> <p>📞 📧 📅 📋 📄 1</p> <p>3 hours ago by Jen Smith</p>	<p>Sarah Grant ☆ 👁 ⋮ 📞 +1 - 114 - 290 - 3818</p> <p>📞 📧 📅 📋 📄 📷</p> <p>26 minutes ago by Jen Smith</p>	<p>Ann Hudson ☆ 👁 ⋮ 📞 +1 - 835 - 333 - 1225</p> <p>📞 📧 📅 📋 📄 📷</p> <p>2 months ago by Jen Smith</p>

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

The diagram illustrates the process of removing a group from a board in three steps:

- Initial Board State:** The board is titled "Opportunities" and has columns for "Success Stage" and "Failure Stage". The "Lead Source" group is selected. The "Add Group" button is highlighted with a red box.
- Group Selection:** A blue arrow points down to a modal window where the "Lead Source" group is highlighted with a red box.
- Final Board State:** A blue arrow points down to the board where the "Lead Source" group has been removed. The "Status" group is highlighted with a red box.

5. Success and Failure Stages

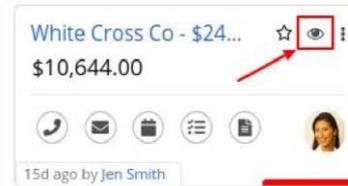
- 5.1. Every Tab (based on a dropdown field) can have a Success & Failure Stage.
- 5.2. Some default stages are already configured in RT SugarBoards by default. However, each user can change the stages according to their preference.
- 5.3. In order to change a stage, go to the Configuration page or Settings Tab in the Board and choose a stage for any Tab from the dropdown for the Module.

The screenshot shows the 'Opportunities' configuration page. It has two columns: 'Success Stage' and 'Failure Stage'. Under 'Success Stage', the dropdown is set to 'Closed Won'. Under 'Failure Stage', the dropdown is set to 'Closed Lost'. The 'Status' dropdown at the bottom is set to 'Select Stage'. A red box highlights the 'Select Stage' dropdown. A blue arrow points down to the next screenshot.

The screenshot shows the 'Opportunities' configuration page after modification. The 'Success Stage' dropdown is now set to 'New' and the 'Failure Stage' dropdown is set to 'Closed Lost'. Both 'New' and 'Closed Lost' are highlighted with red boxes. A blue arrow points down from the previous screenshot.

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.

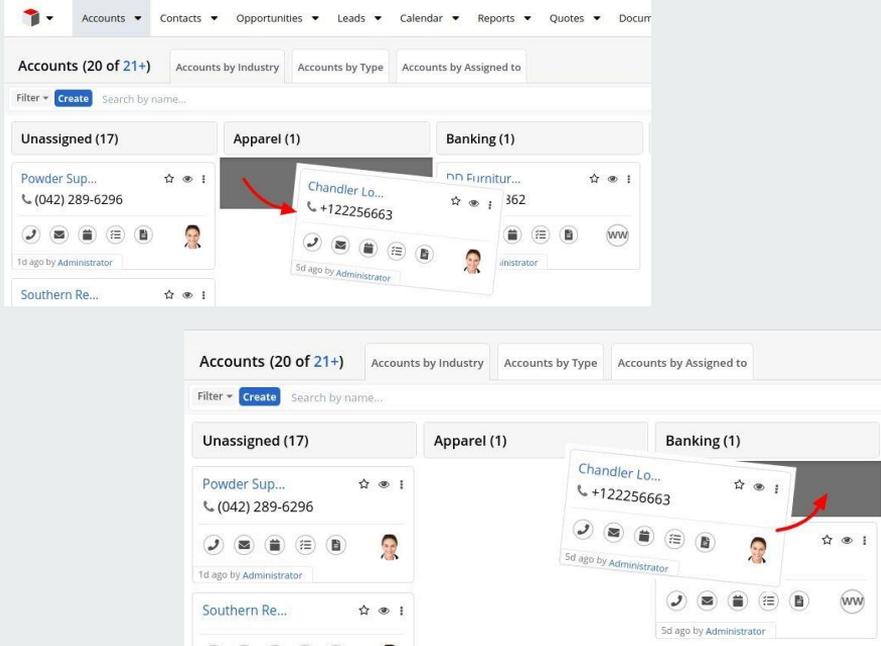


The screenshot shows the 'Preview' panel for an opportunity. It displays the following information:

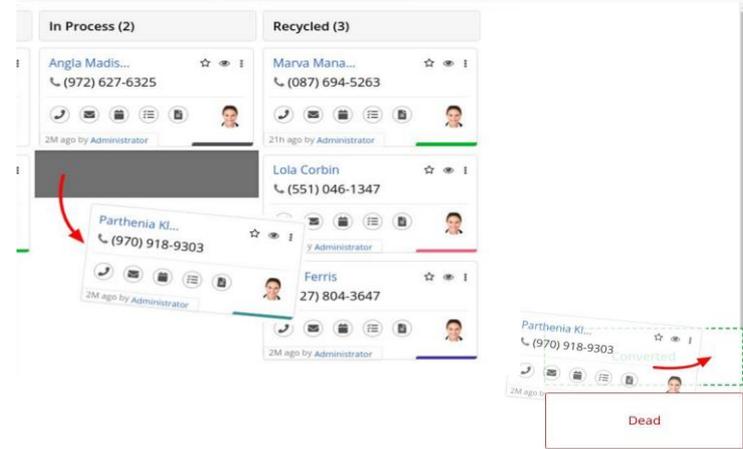
- Opportunity Name: White Cross Co - \$2404 - New - 190 Units
- Account Name: White Cross Co
- Expected Close Date: 2020-03-31
- Likely: \$10,644.00
- Best: \$11,371.00
- Worst: \$9,917.00
- Status: In Progress
- Tags: (None listed)
- Updated Team ID on White Cross Co - \$2404 - New - 190 Units. (Jen Smith on 2019-12-16 10:54)

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.

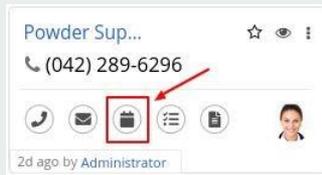


- 7.3. For certain modules, RT SugarBoards includes a Success and a Failure to help boost the productivity.
- 7.4. For instance, once a Lead becomes a customer, the conversion from Lead to Account, Contact, and Opportunity can be done by dragging the Card and dropping it in the Success area.
- 7.5. In 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.

A screenshot of the 'Quick Create Activities' form. The form has fields for 'Subject', 'Start Date', 'End Date', 'Repeat Type', 'Location', 'Description', 'Meeting Type', 'Guests', 'Assigned to', and 'Teams'. A red box highlights the 'Related to' field, which contains the text 'Account' and 'Powder Suppliers'. A red arrow points from the calendar icon in the card above to this field.

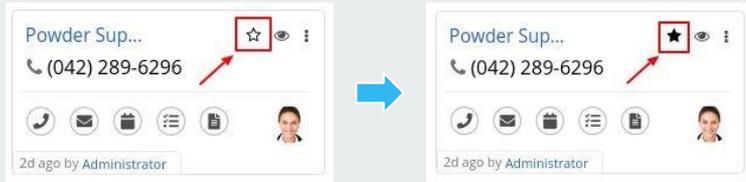
9. Quick Edit

- 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.

A screenshot of the 'Quick Edit' form. The form has fields for 'Name', 'Website', 'Industry', 'Member of', 'Type', 'Assigned to', 'Office Phone', and 'Tags'. A red box highlights the 'Name' field, which contains the text 'Powder Suppliers'. A red arrow points from the ellipsis menu in the card above to this field.

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.

Opportunities (20 of 21+)		Opportunities by Sales Stage	Opportunities
Filter ▾ Create		Search by opportunity name...	
Prospecting (2)		Qualification (1)	
\$1,560		\$5,968	
arianne herr... \$500.00	☆ 👁 ⋮	Union Bank \$5,968.00	☆ 👁 ⋮

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.

Opportunities (3) Opportunities by Sales Stage Opportunities by Lead Source Opportunities by Assigned to

Filter ▾ My Favorites ⓘ Search by opportunity name...

Prospecting (1)	Qualification (1)	Needs Analysis (1)
\$500	\$5,968	\$6,402
arianne herr... ★ 👁 ⓘ \$500.00 📞 📧 📅 📋 📄 👤 2d ago by Administrator	Union Bank ★ 👁 ⓘ \$5,968.00 📞 📧 📅 📋 📄 👤 2d ago by Administrator	Internationa... ★ 👁 ⓘ \$6,402.22 📞 📧 📅 📋 📄 👤 2M ago by Administrator

Accounts

- Calls
- Emails
- Meetings
- Tasks
- Notes

Calls

- Notes

Cases

- Calls
- Emails
- Meetings
- Tasks
- Notes

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.

- 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

- Name
- Contact Number

- Title

2.5. Emails

- Subject
- Receiver

- Title
- Account Name
- Department

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

2.12. Tasks

- Subject
- Start Date
- Total Entries
- Description

2.13. Notes

- Subject
- Contact Name
- Status
- Description

- 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

4.3. Opportunities

- Failure:
Closed Lost

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	<input type="button" value="Uninstall"/>	<input type="button" value="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.