

Check Lists. SugarCRM

Administration Guide

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1. Release purpose

Implementation of Check lists functionality

2. New functionality in SugarCRM

New Modules:

- Leads Steps Templates
- Lead Steps
- Pre-Required Lead Steps Templates
- Pre-Required Lead Steps
- Leads Steps History
- Leads Stage History
- Out Of Office
- Additional Settings

3. Solution package

Files	Description
z20160610_CheckList_1.0.0.zip	Set Up package

4. Version Compatibility

Sugar CRM 7.6.2 & 7.7

PRO, ENT, UT

5. The installation of updates

Prior to installation of the patch, please make:

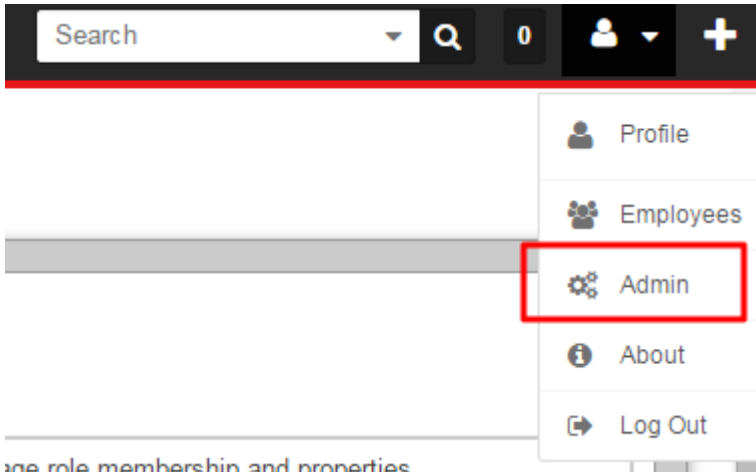
- Backup of the Sugar instance
- Backup of database

The installation of updates provides uploading of files and executing of SQL scripts in a **strict sequence**.

a) Installation of the file z20160610_CheckList_1.0.0.zip

CRM-system Administrator performs the installation of update files:

1. To install updates
 - i. To log in to SugarCRM using Administrator account or another user which User Type = "System Administrator User".
 - ii. Navigate to **Admin** tab.



...role membership and properties

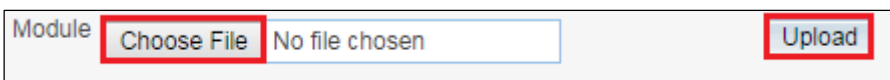
- iii. Navigate to **Developer Tools -> Module Loader**.

Developer Tools

Create and edit modules and module layouts, manage standard and custom fields.

Studio	Customize module fields, layouts and relationships
Module Builder	Build new modules to expand the functionality of Sugar
Module Loader	Add or remove Sugar modules, themes, language packs and other extensions
Styleguide (Lab)	Documentation and samples
Workflow Management	Manage workflow conditions, alerts and actions

- iv. Click **“Choose file”** and choose the files z20160610_CheckList_1.0.0.zip
Click **“Upload”**.



- v. After the module is uploaded, click **“Install”**, then – **“Commit”**

After installation the module will appear in the list of installed modules.

b) Installation of the file z20160610_CheckList_1.0.0.zip

Please, repeat the article a) of previous section (uploading and installation of the file)

c) Navigate to Administration (Admin) -> Repair, run Quick Repair and Rebuild.













System

Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings.

System Settings	Configure system-wide settings	Import Wizard	Use the system
Locale	Set default localization settings for your system	Upgrade Wizard	Upload
Currencies	Set up currencies and conversion rates	Backups	Backup
Languages	Manage which languages are available for users	Repair	Check
Search	Select modules for the Global Search and configure full-text searching.	Diagnostic Tool	Capture analysis
Connectors	Manage connector settings	Tracker	Enable

Please, run the process of Quick Repair and Rebuild, using System Administrator User account. The system will offer you to run the Database changes – please, run these changes.

Repair

 Quick Repair and Rebuild	Repairs and rebuilds DB, Extensions, Vardefs, Sugar Dashlets etc.
 Upgrade Teams	Creates teams for users
 Expand Column Width	Expands certain char, varchar and text columns in database (MSSQL ONLY)
 Rebuild .htaccess File	Rebuilds .htaccess to limit access to certain files directly
 Rebuild Config File	Rebuilds config.php by updating version and adding defaults when not explicitly de
 Rebuild Sugar Logic Functions	Rebuilds Sugar Logic functions cache
 Rebuild Relationships	Rebuilds relationship metadata and drops the cache file
 Rebuild Schedulers	Rebuilds out-of-the-box Scheduler Jobs
 Rebuild Sugar Dashlets	Rebuilds the Sugar Dashlets cache file
 Rebuild WorkFlow	Rebuilds the workflow cache & compile plugins after you re-install, drop tables or i
 Rebuild Javascript Languages	Rebuilds javascript versions of language files
 Rebuild JS Compressed Files	Copies original Full JS Source files and replaces existing compressed JS files

6. Create Schedulers

To enable all features of Check lists functionality, such as, Notifications about Leads suspension, please create following Sugar Schedulers:

1. Log in SugarCRM as admin or another account with administrator access right;
2. Go to the Admin administration page;
3. In the section System select Scheduler;
4. Initiate creating of the new **Scheduler**.
5. Create following Scheduler entries with following characteristics:

a) Daily counting «Update leads in stage days» in Leads records

- Job Name = "Update Leads in stage, days"
- Job = "Update leads in stage days"
- Status = "Active"
- Advanced Options = "Yes"
- min = "1"
- hrs = "0"
- Execute if Missed = "Yes"
- Date & Time Start – date of job start
- Date & Time End - 01.01.3016

b) Daily counting «Update days in current stage without activities » in Leads records

- Job Name = " Update days in current stage without activities "
- Job = " Update days in current stage without activities "
- Status = "Active"
- Advanced Options = "Yes"
- min = "0"
- hrs = "1"
- Execute if Missed = "Yes"
- Date & Time Start – date of job start
- Date & Time End - 01.01.3016

c) Daily counting « Send Email about lead/opportunity suspension » in Leads records

- Job Name = " Send Email about lead/opportunity suspension "
- Job = " Send Email about lead/opportunity suspension "
- Status = "Active"
- Advanced Options = "Yes"
- min = "0"
- hrs = "2"
- Execute if Missed = "Yes"
- Date & Time Start – date of job start
- Date & Time End - 01.01.3016

7. Display Modules and Subpanels for web version

To configure the correct work of the Check lists functionality you should display new modules in Sugar Interface:

- a) Log in SugarCRM as admin or another account with administrator access right.
- b) Go to the Admin administration page;
- c) Go to Display Modules and Subpanels
- d) Display following modules:
 - Leads Steps Templates
 - Pre-Required Lead Steps
 - Pre-Required Lead Steps Templates
 - Lead Steps
 - Out Of Office
- e) Display following Subpanels:
 - Leads Steps History
 - Leads Stage History

8. Display Modules in Mobile version

To configure the correct work of the Check lists functionality in Mobile you should display new modules:

- a) Log in SugarCRM as admin or another account with administrator access right.
- b) Go to the Admin administration page;
- c) Go to Mobile
- d) Display following modules:
 - Pre-Required Lead Steps
 - Lead Steps
 - Leads Steps History
 - Leads Stage History

9. User Roles Settings

It is recommended to restrict the administration of Check lists functionality and provide such access to users with special role. To restrict the access to Check lists administration modules:

1. Log in SugarCRM as admin or another account with administrator access right.
2. Go to the Admin administration page;
3. Go to Roles.

It is recommended to provide following access to regular users:

	Access	Access Type	Delete	Edit	Export	Import	List	Mass Update	View
Lead Steps	Enabled	Normal	None	All	None	None	All	None	All
Lead Steps Templates	Disabled	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Leads Stage History	Enabled	Normal	None	None	None	None	All	None	All
Leads Steps History	Enabled	Normal	None	None	None	None	All	None	All
Pre-Required Lead Steps	Enabled	Normal	None	None	None	None	All	None	All
Pre-Required Lead Steps Templates	Disabled	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set
Out of Office	Enabled	Normal	None	All	None	None	All	None	All