

Zajednicki prostor : Getting Started with SugarCRM

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Overview

[Understand Customer Relationship Management](#)

Navigation

[Log Into Sugar Suite](#) - This section will enable you to understand logging into Sugar Suite and selecting the display theme and language.

[Use System Links](#) - Learn about Sugar Suite system links which consist of the My Account, Employees, Logout and About links.

[Navigate Sugar Suite Home Page](#) - This section will enable you to navigate the home page elements and links.

[Navigate Sugar Suite](#) -This section will enable you to understand Sugar Suite components including modules, views and panels.

Working with Records

[Understand Record Terms, Icons and Actions](#) -Learn about Sugar Suite icons, terms and actions.

[Create and Manage Records](#) - Learn how to create and manage new records using list, detail and edit views.

[Manage Record History](#) - Learn how to manage related notes, attachments, held activities, and emails for a record and then view them all in one place.

[Create Notes and Attachments](#) -This section enables you to create and manage notes and attachments.

[Exporting Data from SugarCRM](#) - Learn more about exporting data from the Sugar Suite application.

[Import Data](#) - Learn more about importing data into the Sugar Suite application.

[Editing and Deleting Multiple Items](#) -This section will enable you to update multiple records with a single action.

[Merge Duplicates](#) - Learn more about finding and merging duplicate records.

[Searching](#) - Learn more about global search and module-specific search.

Activities and Calendar

[Manage Activities Overview](#) - Understand the basics of managing your activities in Sugar.

[Manage the Calendar](#) - Understand how to use the calendar to view meetings, calls, and tasks.

[Create and Manage Tasks](#) - Learn how to create task records and use them to manage your action items.

[Create Calls and Meetings](#) - Learn how to schedule calls and meetings and send invites from Sugar.