



Search & Filter Like a Pro: Navigate Sugar with Speed

SugarU Live Webinar Series

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Introduction: Andrea Ayers



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Agenda

- Why Good Search Matters
- Global Search & Sweet Spot
- Module List View Search & Filter
- Record View Search & Related Records
- Best Practices, Tips, & Common Pitfalls
- Interactive Exercise | Q&A
- Wrap-Up & Next Steps

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Poll:
What is your biggest time sink in Sugar search?

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Why Good Search Matters

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You Use Search More Than You Realize

- End-users spend a surprising amount of time trying to find:
- A contact they spoke to last week
- An account with a similar name
- An opportunity that's closing soon
- A case that a teammate updated recently
- A record they *know* exists... somewhere

When search is slow or ineffective, it creates friction every single day. Good search habits save minutes per task — and those minutes add up across calls, follow-ups, and handoffs.

“If you spend even 10 minutes a day hunting for records, that’s 40 hours a year — an entire workweek lost to searching.”

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Sugar Has a LOT of Data – and Growing

As your org grows, so does your CRM:

- More leads
- More contacts and accounts
- More email records
- More interactions, calls, notes, tasks, meetings

Without a structured way to find things, users can quickly feel overwhelmed.

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Fast Search = Faster Work

Every second counts when you're:

- On the phone with a customer
- Looking up a price or contract
- Trying to respond to a service issue
- Preparing for a meeting

Good search lets you act quickly and confidently, reducing context switching and stress.

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Better Search Reduces Data Entry Mistakes

Poor search often leads to:

- Duplicate record creation
- Incorrect assumptions about what already exists
- Users updating the wrong record
- Missing history because the wrong record was pulled up

Good search reduces these data quality issues.



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Enhanced Customer Experience

Customer interactions feel smoother when users can quickly pull up correct information.

Example:

- “Let me pull that up... one moment...” turns into
- “I have your account details right here.”

This improves:

- Call efficiency
- Customer confidence
- Professionalism
- First-call resolution

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Consistency Across Your Team

When everyone uses filters, operators, and Sweet Spot the same way, teams:

- Work more efficiently
- Report more accurately
- Collaborate more easily
- Reduce training gaps for new hires

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Deep Dive: Global Search & Sweet Spot

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What is Global Search?

- Search across all modules you have access to
- Great for finding records when you're unsure where they live
- Fast, full-text searching



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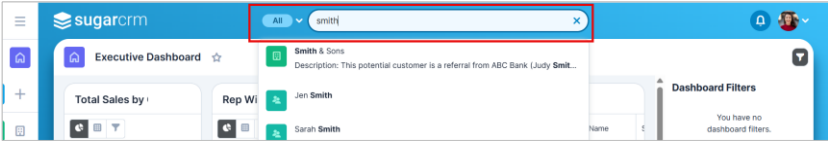
Global Search

How to Use

- Located at the top navigation bar
- Preview results appear as you type
- 'View All Results' shows full categorized results

Module Filtering

- Filter which modules to search
- Helps reduce clutter and improves relevance
- Example: Contacts + Leads for people searches



Operators

- AND → must include both terms
- OR → finds either option
- NOT → exclude terms
- Examples:
 - John AND texas
 - acme NOT closed
 - kathryn OR catherine

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How to Open Sweet Spot

Define

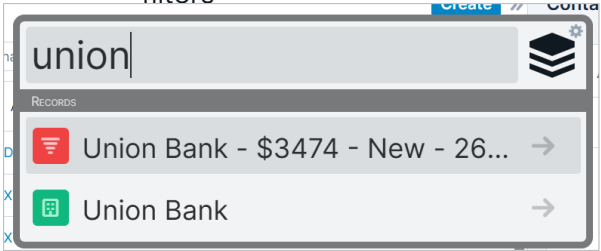
- Keyboard-driven command launcher
- Jump to any module or record instantly
- Great for multitasking and reducing clicks

How to Open

- Windows: Ctrl + Shift + Space
- Mac: Cmd + Shift + Space
- Type to navigate, search, or run quick actions

Use Cases

- Navigate to modules (e.g., Accounts, Opportunities)
- Search records directly
- Open dashboards, recent items, saved filters



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Demo Flow

- Global Search basics
- Operators
- Wildcards
- Sweet Spot navigation

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Deep Dive: Module List View Search & Filter

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What List View Search Does

Every module in Sugar (Accounts, Contacts, Leads, Opportunities, Cases, etc.) has **its own List View**. List View Page: A table of records + a set of filters to help you find exactly what you need.

List View search is different from Global Search because:

- It searches **fields specific to that module**
- It supports **field-level filtering**
- You can build **complex, multi-condition search filters**
- You can **save** frequently used filters
- You can share filters for consistent team usage (if permissions allow)

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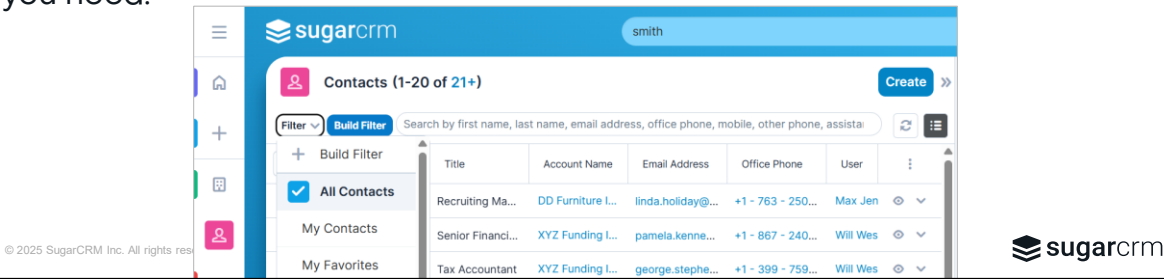
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Where to Find List View Search

At the top of every module’s list view, you’ll find:

- The **Search Box** (keyword search)
- The **Filter Panel** (opened from the left sidebar or appearing automatically)
- A set of **default quick filters**

These tools let you narrow down the thousands of records into the handful you need.



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Using the Search Box

The Search Box supports:

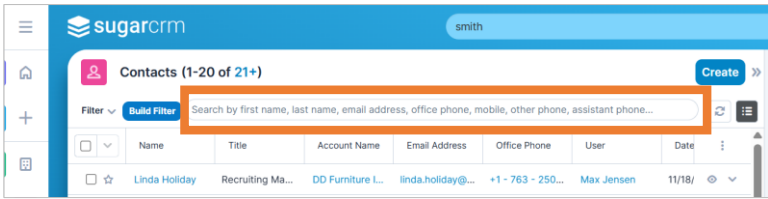
- Partial matches
- Exact matches
- Wildcards (% and _)
- Any field that’s enabled for quick search (varies by module)

Examples:

- Typing “Acu” → finds AccuVision, AcuSys, Acumen Global
- Typing “555-12” → finds phone numbers beginning with those digits
- Typing “%tech%” → finds names *containing* “tech”

Best for:

Fast, simple lookups (names, phone numbers, emails)



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Using Filters (The Power Tool of List Views)

The Filter Panel is where the real magic happens. Sugar provides:

- **Default filters**
- **Module-specific fields to filter on**
- **Advanced operators**
- **Filter saving + reuse**

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Default Filter

Sugar includes a set of built-in filters for your convenience:

- **All Records:** Shows all records in the module (that you have permission to see).
- **My Records:** Shows only the records assigned to *you*.
- **My Favorites:** Records you've manually starred.
- **Recently Viewed:** Super useful for quickly jumping back to something you worked on earlier.

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Common Real-World Filter Examples

For Sales

- Opportunities **closing this quarter**
- Accounts with **Industry = Manufacturing**
- Leads created **last 7 days** and **not contacted**

For Service

- Cases **Assigned to Me** AND **Status = New**
- All **High Priority** cases
- Cases closed **last month**

For Marketing

- Contacts with **Email Opt-In = Yes**
- Leads from **specific campaigns**
- Contacts created via **Web to Lead**

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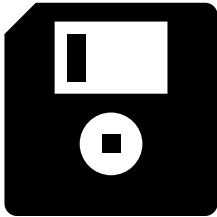
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Saved Filters (Your Personal Productivity Booster)

When you build a useful filter: **save it!**

Saved filters:

- Show up instantly under your Filters Panel
- Are reusable anytime
- Save minutes every day
- Can be shared with others (if admin-enabled)
- Improve consistency across teams



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Search Memory (The Hidden Gotcha)

Sugar remembers your **last filter** in each module.

This means:

- You may open a module and see no results
- Not because there are no records — but because a filter is still applied

Always check the filter panel if something looks “empty.”

Best Practice:

Clear your filters before starting a new search to avoid confusion.

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Wildcards in List View Search

Wildcards here too:

Pattern	Meaning	Example
%abc	Ends with	%Inc → “Tech Inc”, “Blue Inc”
abc%	Starts with	Mar% → “Mark”, “Marcus”, “Marlin”
%abc%	Contains	%tech% → “FinTech”, “TechCorp”
j_n	Single character	j_n → Jon, Jan, Jen

Use wildcards when spelling or formatting varies.

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Title View Search

- Default Filters
- Build a Filter
- Search Bar
- Sort by

The screenshot shows the SugarCRM interface in 'Opportunities by Time' view. The top navigation bar includes the SugarCRM logo, a search bar with 'smith', and a 'Create' button. Below the navigation bar, there are tabs for 'Opportunities by Time' and 'Opportunities by Sales Stage'. A search bar with a 'Filter' dropdown and a 'Build Filter' button is highlighted with an orange box. To the right of the search bar is a 'Sort by' dropdown menu. Below these elements, the main content area displays a grid of opportunity cards for each month from November 2025 to March 2026. Each card shows the total value for the month, a list of opportunities with their names, dates, and values, and a 'Create' button. An arrow points to the 'Create' button on the March 2026 card.

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Demo Flow

- List View and Tile View Searches

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Deep Dive: Record View Search & Related Records

For Sidecar Modules

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Record View Search

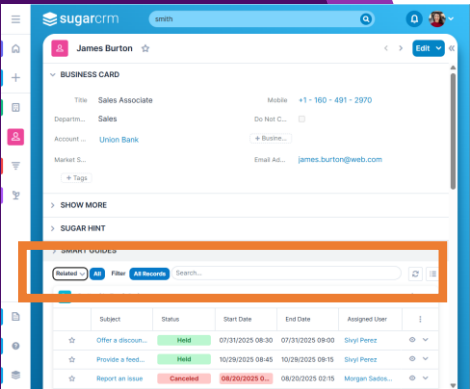
Each record has its **own mini search bar** and filtering capabilities

Helps you:

- Pinpoint a single related item out of dozens or hundreds
- Search within one specific subpanel
- Filter related records by field values
- Reduce screen clutter
- Verify relationships quickly

Every Record View Search includes:

- A **Related Option** to choose a specific related module
- Ability to **Build a Filter**
- A **Filter Dropdown** or quick filter fields (varies by module)
- A **Search Bar** A **Filter Dropdown** or quick filter fields (varies by module)



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Using Related Record Search

This search bar typically supports:

- Text search
- Partial matches
- Wildcards (% and _)
- Filtering across multiple fields (e.g., name + email)

Examples:

- In an Account’s Contacts subpanel, typing “**Ann**” finds Ann, Anna, Annie.
- Searching “**CA**” in the Cases subpanel can locate state-based issues or case subjects.
- Typing “**%Q4%**” finds opportunities tied to Q4 naming conventions.

Subpanel search is ideal for **fast filtering** inside a single module’s related data.

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Demo Flow

- Related Record Searches

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Best Practices, Tips & Common Pitfalls

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Searching Best Practices

1. Start with the simplest search first.
2. Use filters instead of scrolling.
3. Use wildcards for flexible matching.
4. Save your frequently used filters.
5. Clear filters before starting a new search.
6. Use Sweet Spot for quick navigation.
7. Use Preview to check records before opening records.

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Common Pitfalls (And How to Avoid Them)

1. Forgetting old filters are still applied
2. Using Global Search for things that require filters
3. Using too many filters at once.
4. Searching the wrong module
5. Not using wildcards where formatting differs
6. Creating duplicate records because search wasn't done first
7. Confusing Favorites with Filters
8. Not sorting columns before searching manually



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Admin Configuration

- **Admin Page > Search**
 - Enable/Disable Modules
 - Schedule System Index
 - During low usage or off-hours
- **Admin Page > Studio > Field**
 - Searchable
 - Boost
- **What Requires Reindexing?**
 - Module enable → ✓ Yes
 - Boost value changes → ✗ No
 - Field search enable → ✓ Yes

Full Text Search Configuration

Full text search will be used to return results for a global search in the desktop application search. Individual module fields can be enabled for full text search via [Studio](#). To enable modules for global searches in SugarCRM Mobile and Sugar Portal, please use [For more information, refer to the Search documentation.](#)

SaveSchedule System IndexCancel

Enabled Modules

AccountsBugsBusiness Centers

Disabled Modules

Smart Guide Sugar ActionsSugar Automate Web HooksSmart Guide Stage Templates

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Q&A

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Wrap-Up & Next Steps

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Key Takeaways

1. **Start Simple — Then Narrow Down**
2. **Use Module Filters to Control Results**
3. **Filters Are Your Most Powerful Tool**
4. **Save Filters You Use Often**
5. **Wildcards Make Search Flexible**
6. **Sweet Spot = Fastest Navigation**
7. **Subpanel Search Helps Inside Records**
8. **Clear Your Filters Often**
9. **Preview Before Opening**
10. **Search Before Creating New Records**

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Resources

- [Sugar Application Guide – Search](#)
- [Sugar Administration Guide > Configuring Global Search](#)
- [Sugar Administration Guide > Searchable Fields](#)
- [Troubleshooting Missing Search Results Help Article](#)

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Tanks for attending this webinar.

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