

Saving Time with SugarCRM Action Button

Do more with fewer clicks!

August 2023

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Webinar Agenda

- What are Action Buttons?
- Benefits of Action Buttons
- Best Practices
- Current Stock Action Buttons in Cases
- Creating Action Buttons
- Demonstration
- Q&A
- Resources



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What are Action Buttons?

- Custom Buttons added to records
- Enable you to perform quick actions
- Implemented as a field type in Studio
- Can be extended using SugarLogic and SugarBPM



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Benefits of Action Buttons



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Action Button Best Practices



Identify most common operations



Clearly label buttons



Test the buttons thoroughly



Give your buttons task-oriented name



Minimalism is key



Preview button display



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Current Stock Action Buttons in Sugar

In the Cases module and the Cases' focus dashboard in Sugar version 13.1 and greater:

- Claim button: Easily claim a case not assigned to you. Found at the top of the record view.
- Close button: Quickly close a case found at the top of the Record View.
- Unassign menu option: Remove the assignee on a case from the menu in the top right corner, freeing up the case to be taken by a different agent.

| Field Name | Field Label | Field Type |
|-----------------|-----------------|--------------|
| action_claim | Action Claim | ActionButton |
| action_close | Action Close | ActionButton |
| action_unassign | Action Unassign | ActionButton |

| Field Name | Field Label | Field Type |
|---------------------------|----------------------------------|--------------|
| business_center_name | Business Center Name | Relationship |
| business_hours_to_resolu | Business Hours to Resolution | Decimal |
| business_hrs_to_first_res | Business Hours to First Response | Decimal |
| case_number | Number | Integer |
| date_entered | Date Created | Datetime |
| date_modified | Date Modified | Datetime |
| deleted | Deleted | Checkbox |
| description | Description | TextArea |

Note: You can customize your own users' experience in the Cases module using Studio. So now you can see an example of a pre-made action button and how it works.

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Examples of Action Buttons

- Escalate a Case
- Reject a Lead
- Add a Call Record to an Opportunity
- Access Supporting Documents from a Quote
- Email Team
- Include a Map to Account Location

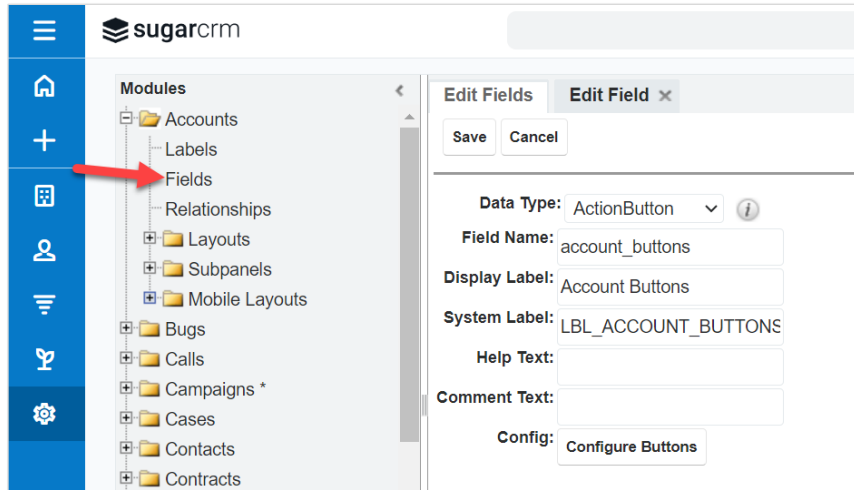


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Adding an Action Button Field

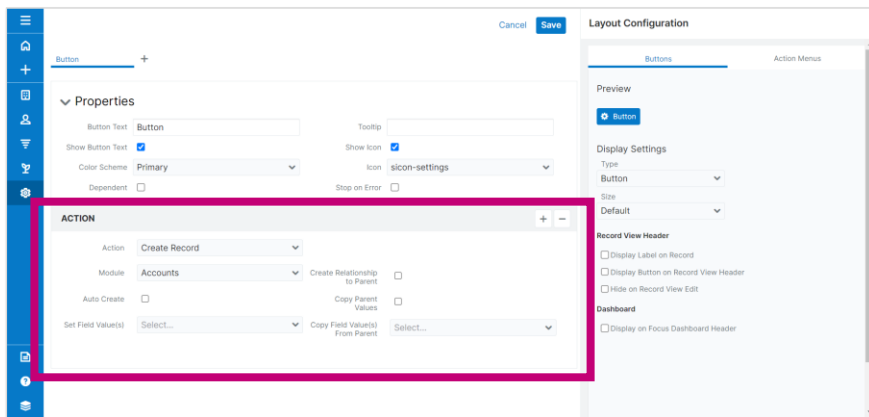


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Configure Action Button



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ACTION

Types of Actions:

- Assign Record
- Compose Email
- Create Record
- Doc Merge
- Open URL
- Run Report
- Update Record

Note: You can assign multiple actions to one button and even reorder the actions.

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Configure Action Button

PROPERTIES

Settings only apply to the button defined on the active tab in the header.

- Button Text
- Show Button Text
- Color Scheme
- Dependent – Formula
- Tooltip
- Show Icon
- Icon
- Stop on Error

Note: Enable the Stop on Error in the Properties section to stop a chain of actions when encountering an error.

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Configure Action Button

LAYOUT CONFIGURATION

Two Panel:

- Buttons
 - Preview
 - Display Settings
 - Record View Header
 - Dashboard
- Action Menu
 - Preview
 - Display Settings

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Any Questions



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Resources

[Action Button Help Articles](#)

[Administration Guide – Action Buttons](#)

[Sugar Logic](#) for Action Button Formulas

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Thanks for attending today's webinar.

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