



# 12.3 UI Redesign & Updates Guide: Sugar Sell & Sugar Serve

Beginning in January 2023 with the 12.3 release of Sugar Sell and Sugar Serve, we're updating the look and feel of the SugarCRM platform with a UI redesign. This redesign is based on direct customer feedback, research, and design best practices, and we couldn't be more excited to share it with you!

The redesigned UI experience will also be available for Sugar Enterprise on-premises with the 13.0 release beginning in April 2023. A full Sugar Market UI redesign will also be available on January 23, 2023 for all users.

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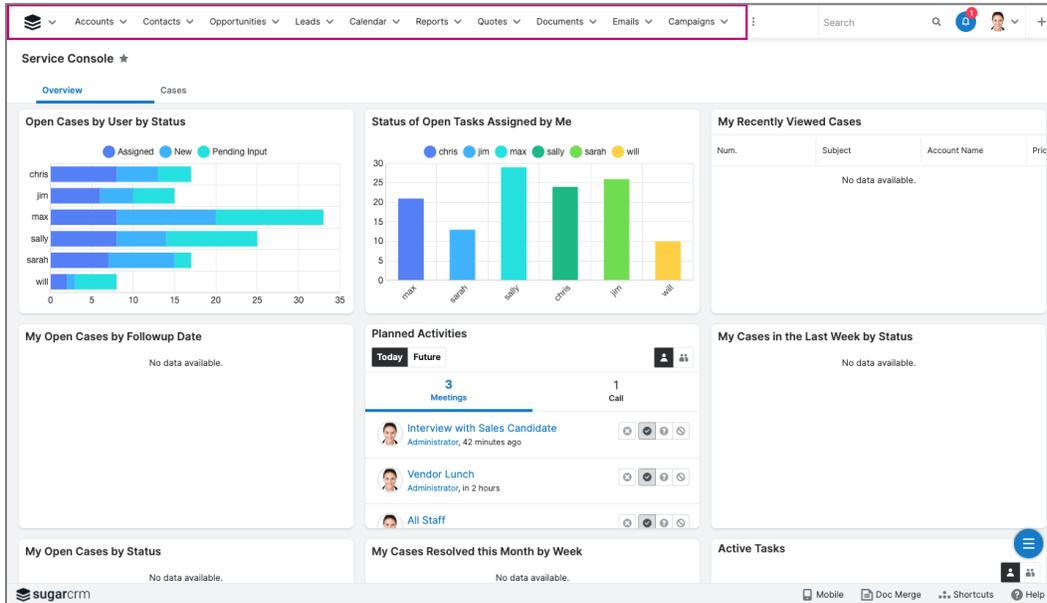
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# New Views

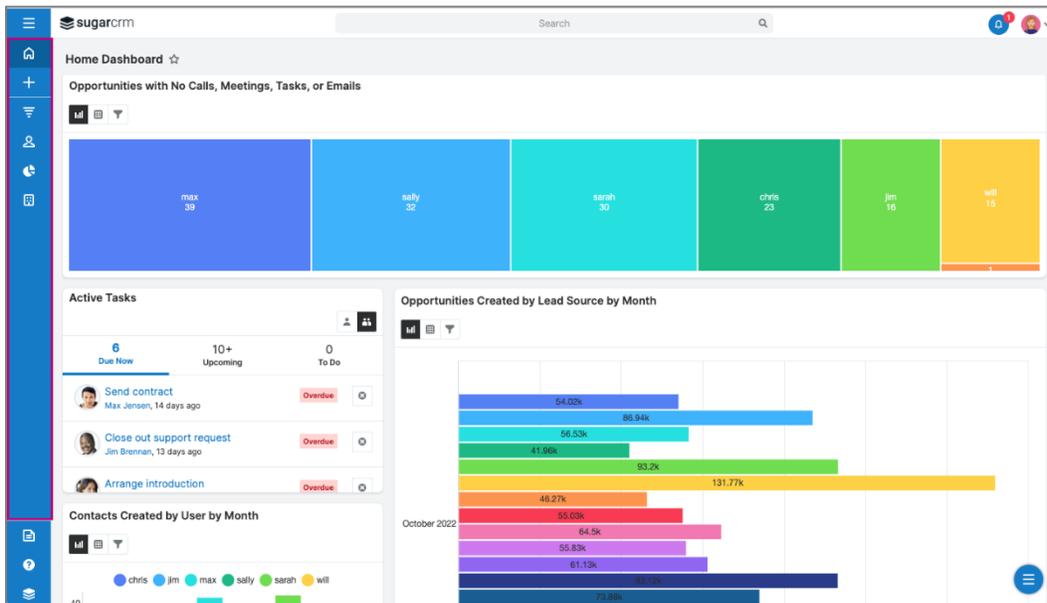
## Sidebar Navigation

Moving the primary navigation from the top to the left allows for clear separation between navigation and content. The secondary menu structure remains the same.

### Previous UI



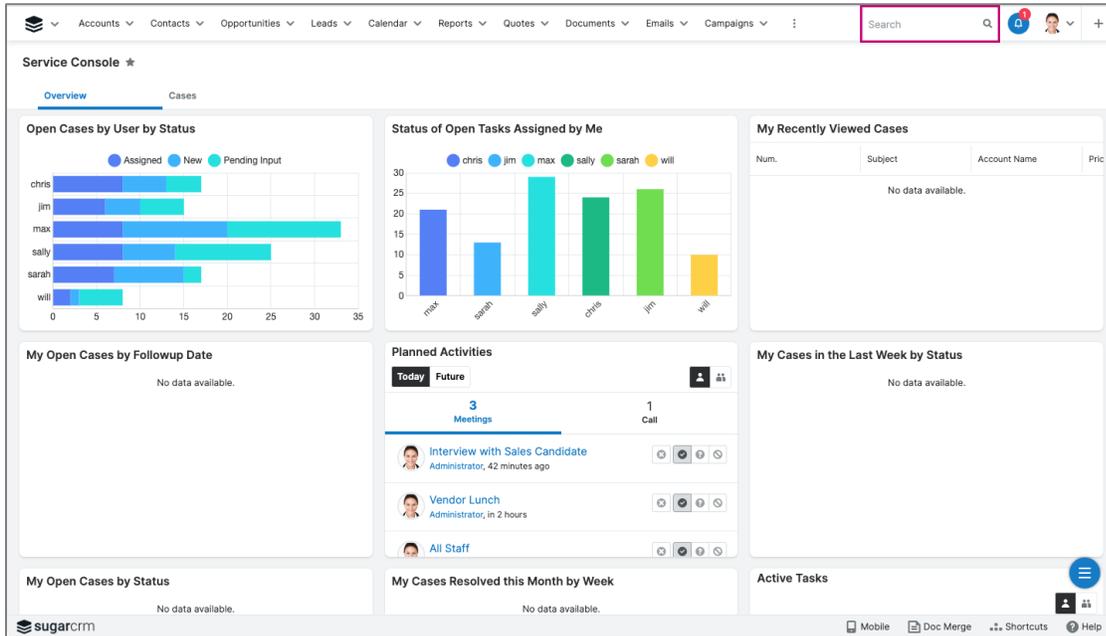
### Redesigned UI



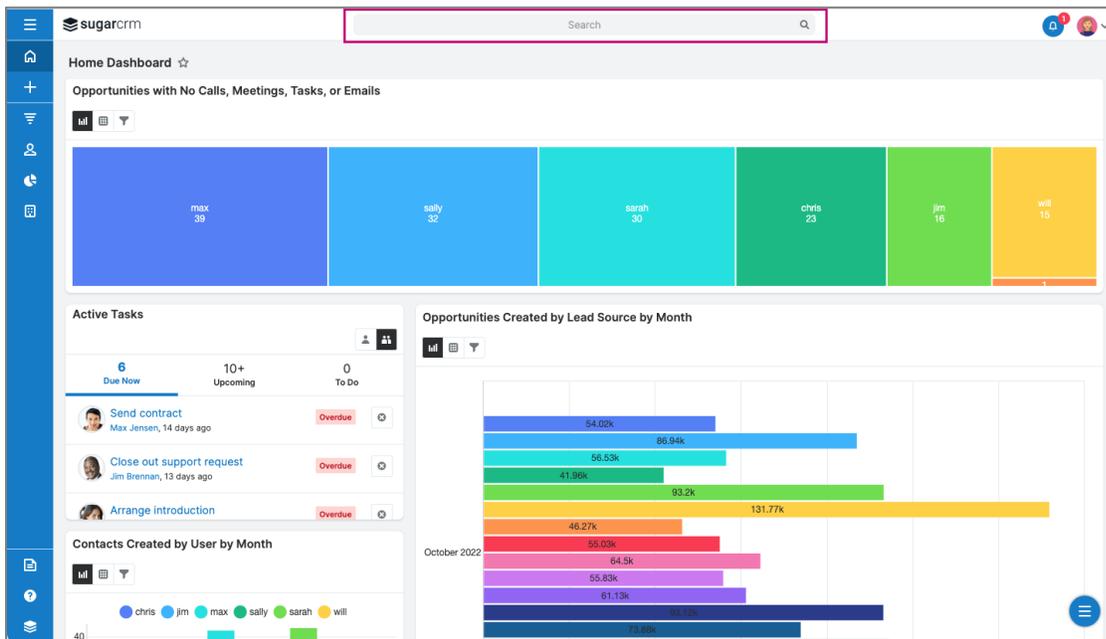
## Search Bar

The search bar is now front and center to allow for ease of use.

## Previous UI



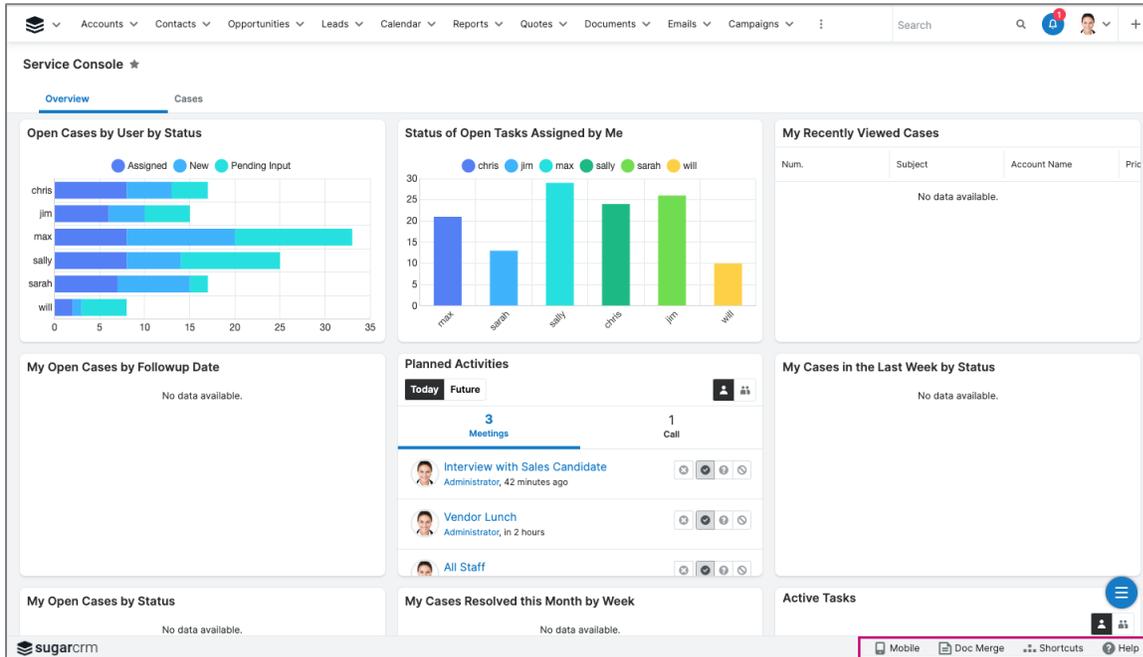
## Redesigned UI



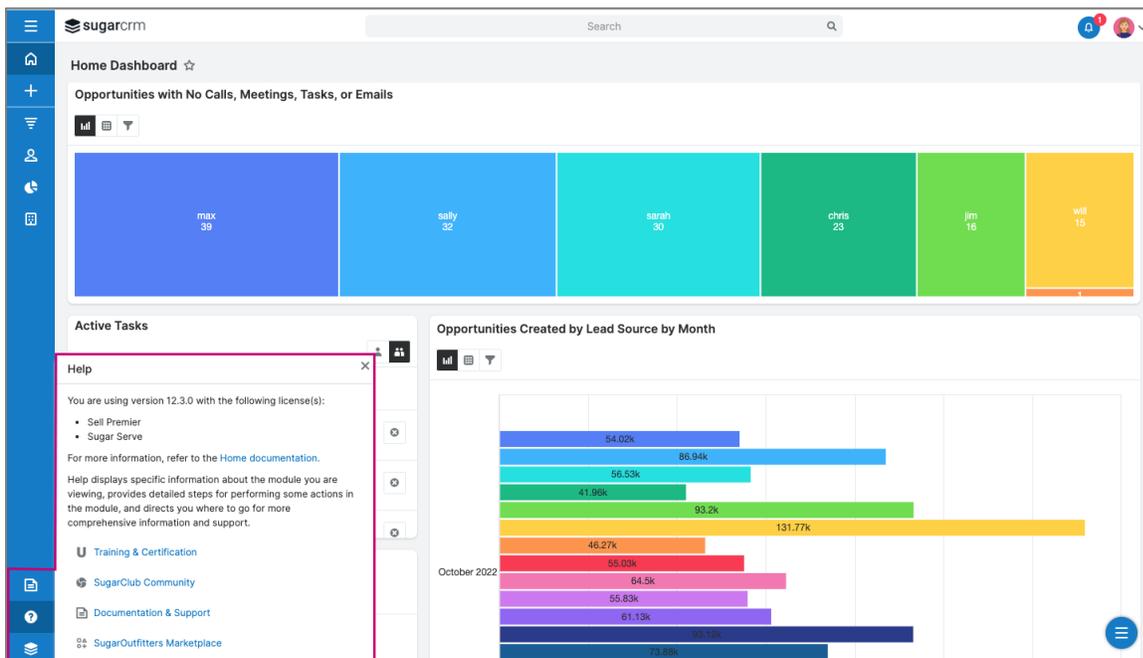
## Footer

To maximize workspace, footer elements have been moved to the left navigation or into menus.

## Previous UI



## Redesigned UI



## New Open Button

Additionally, you can find your new Open button (three-line icon) here. You can click this to see additional modules.

The screenshot displays the SugarCRM Home Dashboard. At the top, there is a search bar and user profile icons. The main content area is divided into several sections:

- Home Dashboard:** A section titled "Opportunities with No Calls, Meetings, Tasks, or Emails" featuring six colored cards representing different users: max (39), sally (32), sarah (30), chris (23), jim (16), and will (15).
- Active Tasks:** A list of tasks with due dates and status. The tasks shown are:
  - Send contract (Due Now, 6) - Max Jensen, 14 days ago - Overdue
  - Close out support request (Upcoming, 10+) - Jim Brennan, 13 days ago - Overdue
  - Arrange introduction (To Do, 0) - Overdue
- Contacts Created by User by Month:** A horizontal bar chart showing the number of contacts created by each user in October 2022. The data is as follows:

User	Contacts Created
max	54.02k
sally	86.94k
sarah	56.53k
chris	41.88k
jim	93.2k
will	131.77k
- Opportunities Created by Lead Source by Month:** A horizontal bar chart showing the number of opportunities created by lead source in October 2022. The data is as follows:

Lead Source	Opportunities Created
Source 1	46.27k
Source 2	55.03k
Source 3	64.5k
Source 4	55.83k
Source 5	61.13k
Source 6	93.12k
Source 7	72.89k

# New & Improved Functionality

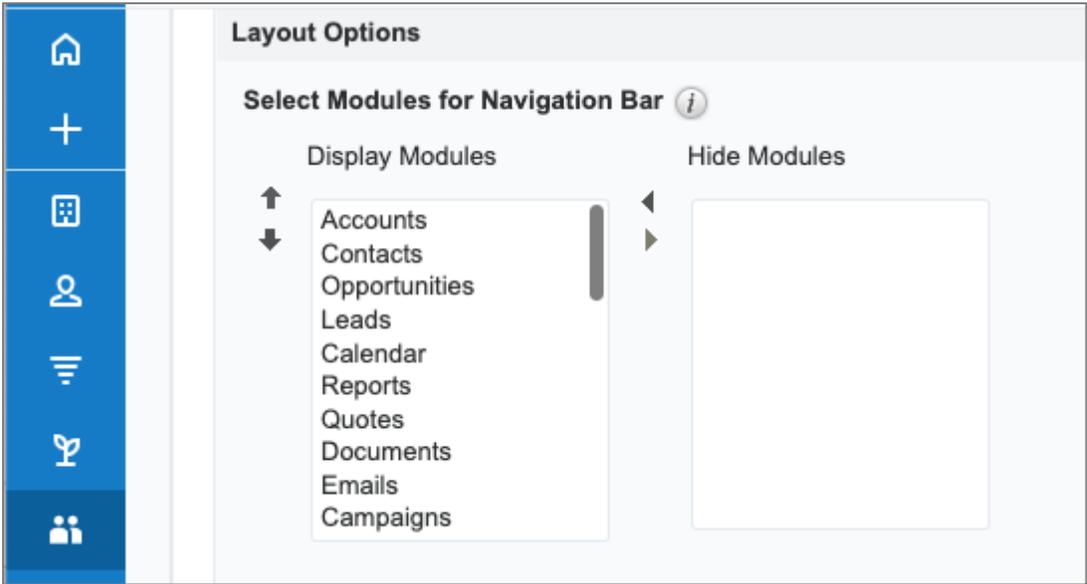
## Pinned Modules

Sugar has introduced the concept of "Pinned Modules" as part of UI redesign. Four module icons are always visible to users. **Note:** if a user focuses on a module that is not on the pinned items, it will be added as the fifth element on the screen.

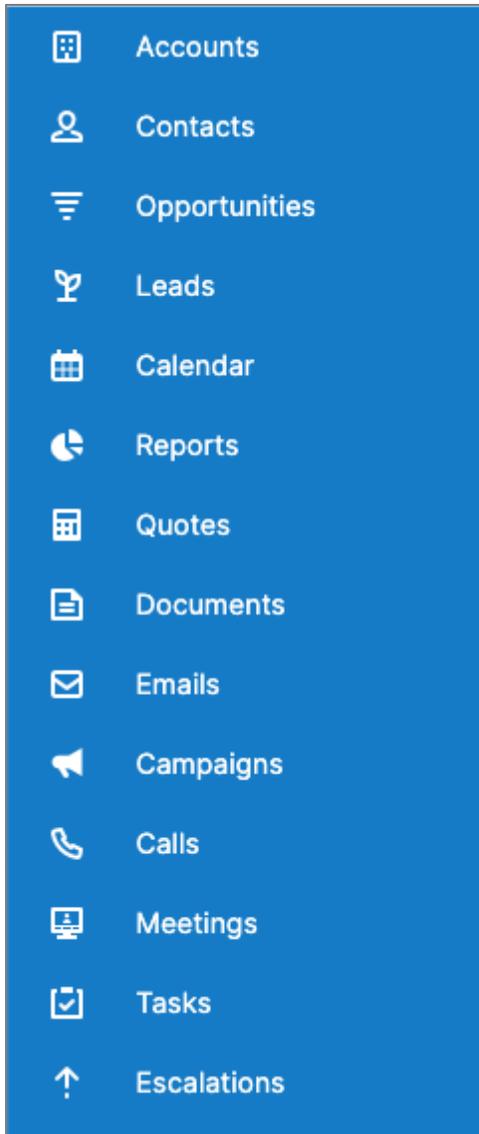


## Personalized Module Order

Users have full control over the order their modules are shown/pinned to improve their day-by-day operations. Users can access these options in their user profile under "layout options."



**Note:** Some implementations may consist of many modules. When expanding the Sidebar, using the Open button at the top, users will be able to access all their modules in a scrollable list.



### Default Icon for Modules

Sugar will use this placeholder icon when a module does not have an icon defined.



Administrators can also use an abbreviation instead of an icon if that makes more sense to their users.

**Note:** abbreviations are language specific.

## Abbreviations vs Icons in Module List

Sugar has completely redesigned its former "Rename Modules" functionality to "Module Names and Icons."

Module Names and Icons					Language: English (US)	Cancel	Save
Module	Singular Label	Plural Label	Display		Module Background Color		
Home	Home	Home	Icon	Home Lg	Ocean		
Contacts	Contact	Contacts	Icon	Contact Lg	Pink		
Accounts	Account	Accounts	Icon	Account Lg	Green		
Opportunities	Opportunity	Opportunities	Icon	Opportunity Lg	Red		
Cases	Case	Cases	Icon	Case Lg	Orange		
Notes	Note	Notes	Icon	Note Lg	Green		
Calls	Call	Calls	Icon	Phone Lg	Pacific		
Emails	Email	Emails	Icon	Email Lg	Ocean		
Meetings	Meeting	Meetings	Icon	Meetings Lg	Teal		
Tasks	Task	Tasks	Icon	Task Lg	Purple		
Calendar	Calendar	Calendar	Icon	Calendar Lg	Teal		
Leads	Lead	Leads	Icon	Lead Lg	Purple		
Contracts	Contract	Contracts	Icon	Contracts Lg	Ocean		
Quotes	Quote	Quotes	Icon	Quote Lg	Pacific		
Products	Quoted Line Item	Quoted Line Items	Icon	Quoted Line Items Lg	Purple		
ProductTemplates	Product	Product Catalog	Icon	Catalog	Pink		
Reports	Report	Reports	Icon	Add Dashlet Lg	Orange		
Forecasts	Forecast	Forecasts	Icon	Forecasts Lg	Army		
Bugs	Bug	Bugs	Icon	Bug	Red		

This functionality provides a new way for Sugar Administrators to display either an icon or an abbreviation for a module in the sidebar.

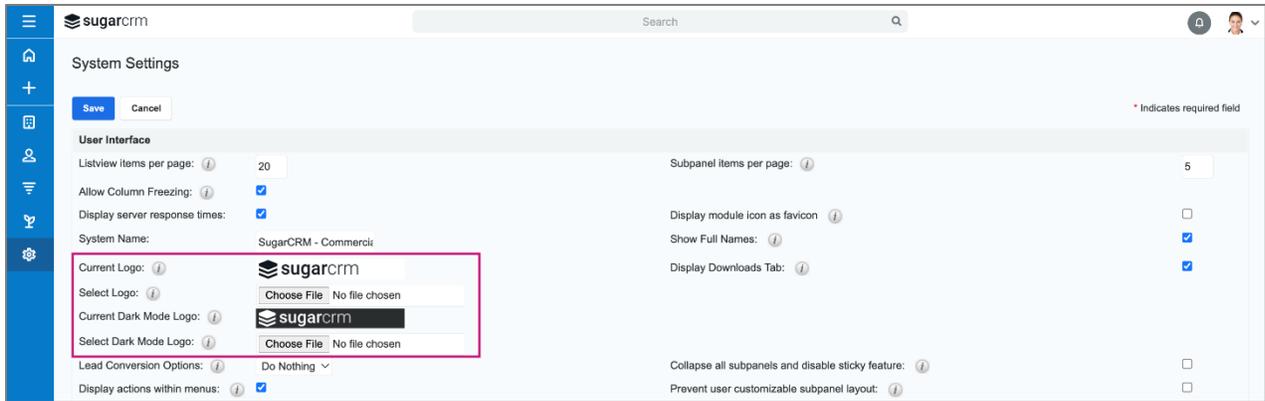
For example, if the display is "Abbreviation," the two-letter text and background color are used instead of an icon. See the example below.

Accounts	Account	Accounts	Abbreviation	Ac	Green
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If the display is an icon, Sugar administrators should choose an icon from the dropdown list.

## Customized Logo

Admins can now replace the standard SugarCRM logo in the left-hand corner with a logo that matches their brand. To change the logo, admins should navigate to the Admin screen and select "System Settings." Once in the System Settings screen, they can upload their logo files for both light and dark modes. Logo requirements: PNG or JPG file with max dimensions of 28x200 px. If a larger file is selected, the image will be scaled down to 28x200 px. Note: File names must not contain a space character.



## Focus Drawers Improvements

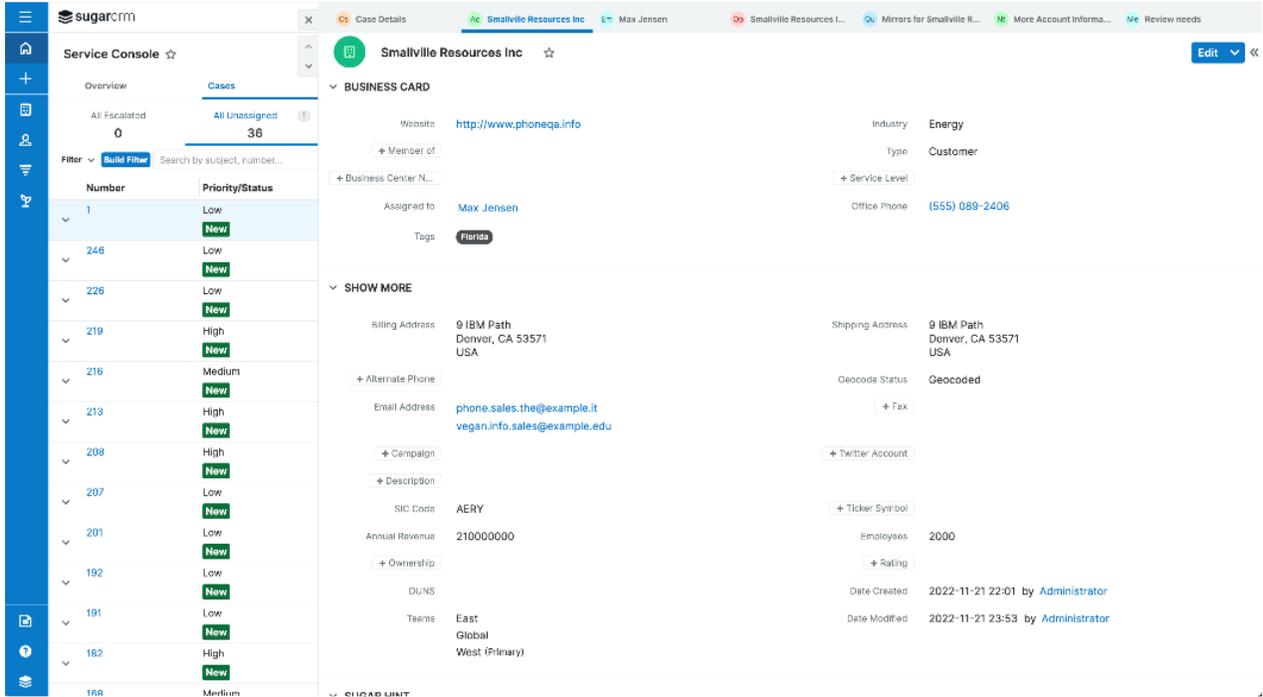
Sales and customer service reps can now get all the key customer information they need on one screen, without the need to open new windows or use the back button to navigate through different modules.

With new Focus Drawer tabs, each record link clicked in a focus drawer opens a new tab within the same focus drawer. This replaces the previous “breadcrumb” model. Each focus drawer tab is identified with the corresponding module icon or abbreviation and the name of the corresponding record.

Additionally, you can now view an entire record view in focus drawers by clicking on the title of a record view dashlet. This provides a view into the full details of a record and allows agents to take action.

This new feature is a great way to increase productivity for Serve/Sell agents as they now can quickly view the details of any record link within the focus drawer without having to leave the focus drawer screen. Additionally, users can easily navigate across the tabs within the focus drawer without closing any of the opened focus drawer tabs.

This allows the consoles to become the services and sales agent’s one-stop workspace.



All business users can use this feature by clicking on the record links or the focus drawer icon within the focus drawers. The new tabs are fully responsive and adjust based on browser screen size.

### Service & Renewals Console Usability Improvements

With this release, we have made several console usability enhancements to improve the service and sales agent’s experience.

For example, agents can now resize columns as needed. They will be able to click on any of the record links on the multiline list view (e.g., Account column is now a link that opens the account’s record view in a focus tab) and Overview tab to open the record view within the focus drawer on the Console.

This makes it easy for sales service agents to access all the records they need to see in one view. It also means fewer clicks—giving customer service agents more time to offer their customers a fantastic experience.

The screenshot displays the SugarCRM Service Console interface. At the top, there is a search bar and a user profile icon. Below the search bar, the 'Service Console' header is visible, followed by tabs for 'Overview' and 'Cases'. Under the 'Cases' tab, there are four filters: 'All Escalated' (0), 'All Unassign...' (36), 'My Team's Cases' (115), and 'My Cases' (0). A 'Filter' dropdown is set to 'Build Filter' with a search input field. The main content is a table of cases with the following data:

Number	Priority/Status	Follow Up	Subject/Description	Business Center	Account	Assigned to
39	Medium New	8 days ago 2022-11-14 00:02	Need to purchase additional licenses	North America	EEE Endowments LTD	Chris Oliver
8	Medium New	in a day 2022-11-23 00:00	Need assistance with large customization	North America	Cumberland Trails Inc	Jim Brennan
1	Low New	in 2 days 2022-11-23 23:51	Warning message when using the wrong browser	North America	Smalville Resources Inc	Max Jensen
26	High New	in 2 days 2022-11-24 00:00	Need assistance with large customization	North America	NW Capital Corp	Max Jensen
30	Low New	in 3 days 2022-11-25 00:01	Having trouble adding new items	North America	NW Capital Corp	Max Jensen
34	High New	in 8 days 2022-11-30 00:01	Need assistance with large customization	North America	Hammer Group Inc	Max Jensen
42	High New	in 9 days 2022-12-01 00:02	Need assistance with large customization	North America	Cloud Cover Trust	Sarah Smith
59	Low New	in 9 days 2022-12-01 00:02	Having trouble adding new items	North America	SuperG Tech	Max Jensen

For additional information about new UI features, please visit our SugarClub [UI redesign post](#).