



SugarU Live Webinar Series

Strengthening Security: Your Guide to Teams & Roles in Sugar

PROTECT YOUR DATA, EMPOWER YOUR USERS

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Learning Objectives

- This session will enable you to:
 - Key Concepts
 - Team Management
 - Three Types of Teams
 - Managing Teams
 - Demonstration of Teams
 - Create a Role
 - Putting It all together
 - Role-Based Views and List Views
 - Demonstration of Roles



Key Concepts

Users, Teams, Roles and Team-based Permissions

Key Concepts: User

What is a User?

- A user is how Sugar identifies the people in your organization who utilize the Sugar system
 - If you are not a user, you cannot access Sugar directly
- A user is how Sugar authenticates you into the system
 - You must supply a valid username/password combination to be authenticated into Sugar
- A user can be assigned records within Sugar
 - Accounts, Contacts, Opportunities, Leads, etc.
- Each user can set their own preference settings
 - Date and time formats, display options, personal information, etc.

Key Concepts: Team

What is a Team?

- A Team is a grouping of users; users are members of a Team
 - Users can belong to multiple Teams
- Teams are used to allow/restrict visibility to records
 - Accounts, Contacts, Opportunities, Leads, etc. are assigned to a Team
- If a user is a member of the same Team that the record is assigned to, then the user can see the record

Key Concepts: Role

What is a Role?

- A Role defines the operations that can be performed within a module
- A Role only takes effect for users who are added to the Role
- Users can belong to multiple Roles
 - The most restrictive aspect of any Role prevails

How Do Users, Teams, and Roles Work Together?

Example:

A sales person is a User, and belongs to the **East Team** and the **Sales Role**

- The sales person can logon to Sugar
- Can the sales person see a particular Opportunity?
 - Only if the Opportunity is assigned to the **East Team** or any other Team is a member
- Can the sales person **edit** an Opportunities?
 - Only if the **Sales Role** allows the Edit operation in Opportunities

Team Management

How Teams & Roles Work Together



ROLES DEFINE WHAT
USERS CAN DO



TEAMS DEFINE WHICH
RECORDS USERS CAN
ACCESS



COMBINED, THEY CREATE A
ROBUST SECURITY MODEL
FOR NON-ADMIN USERS

What Are Teams Used For?

Control record-level visibility

Enable collaboration across specific users

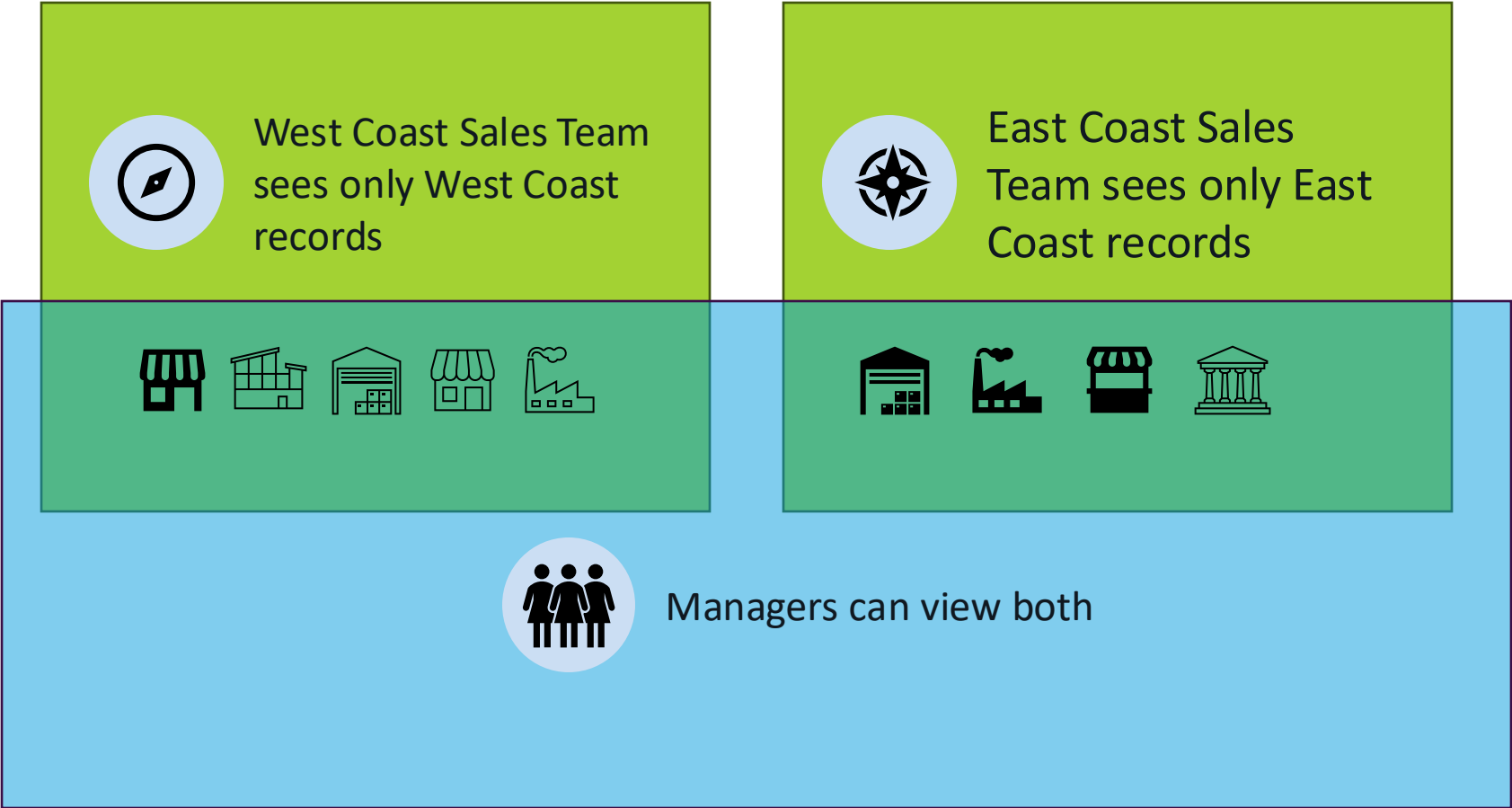
Organize records by:

Departments

Geographic Regions

Custom Groupings

Example: Regional Sales Teams



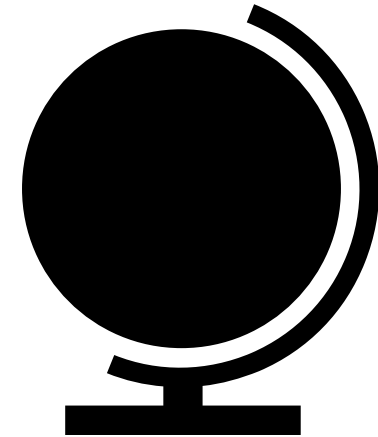
Three Types of Teams

Understanding Global, Standard, and Private Teams

The Global Team

- Created automatically when a Sugar instance is set up
- Default team for all new users
- Universal team – all users are members by default
- Records associated with Global team are visible to all members

Note: The Global team cannot be deleted



Standard Teams



CREATED BY ADMINISTRATORS
VIA TEAM MANAGEMENT



USED TO ORGANIZE AND
GRANT ACCESS BASED ON
ORGANIZATION STRUCTURE



COMMONLY GROUPED BY:
DEPARTMENT (E.G., SALES,
SUPPORT)
GEOGRAPHICAL REGIONS
JOB DUTIES

Private Teams

- Automatically created for each user
- Named after the user's first and last name by default
- Updated automatically if the user's profile is edited
- Example: 'Jane Smith' private team is reset if her profile changes
- To prevent auto-updates, enable the setting in Admin > System Settings

Prevent private team names from inheriting the user's name fields:

NOTE: Deleting private teams requires you to delete the user first then their private team can be deleted.



Managing Teams

Creating, Deleting, Removing Users, and Repairing Teams

Creating Teams

Two methods to create teams:

- (1) Use Teams module tab's action list
- (2) Duplicate an existing team and edit it

Admins must associate users after creating a team

SugarIdentity allows impersonation to preview user permissions

Deleting Teams

Delete from Teams detail view (single record) or list view (bulk)

Deletes team-user relationships only, not user records

Private teams can only be deleted if the user is deleted

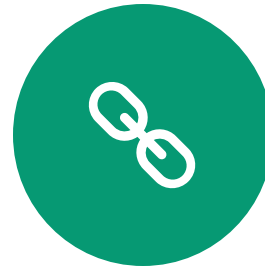
Removing Users From Teams



USERS CAN BELONG
TO MULTIPLE TEAMS



TEAMS CAN HAVE MANY
USERS



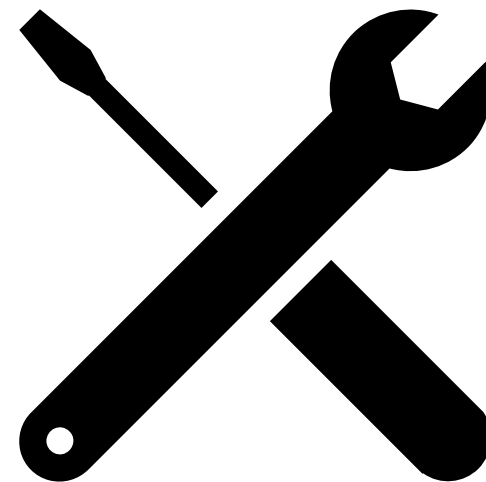
REMOVE USER-TEAM LINKS
FROM:
TEAM DETAIL VIEW
USER RECORD VIEW



USE SUBPANELS TO
MANAGE RELATIONSHIPS

Repairing Teams

- Found under Admin > Repair menu
- Used to improve team structures
- Two options available:
 - Upgrade Teams: ensures all users have private teams
 - Repair Teams: runs 4 repair processes to rebuild team accesses



Demonstration: How to Create a Team



Role Management

Defining User Access and Permissions



What Are Roles?

- Define access to modules and actions users can perform

Role Configuration Options

- Enforce restrictions on:
 - Entire module
 - Specific fields in module
- Use both permissions types for robust control

Assign Roles



- Admins can create and assign roles to regular users
- Users can belong to multiple roles
- Sugar applies the most restrictive aspects access level
- Admins cannot be assigned roles – they are superusers

Layers of Access Control

Module-Level Permissions
(Roles)

Record-Level Permissions
(Team-Based)

Field-Level Permissions
(Roles)

Module Exceptions

- Some modules handle roles differently:



- Forecasts Module

- Access controlled only at the module level
- Ignores module- and field-level ACLs of related modules
- Example: Opportunity data shown in Forecasts is editable regardless of user access to Opportunities module



- Reports Module

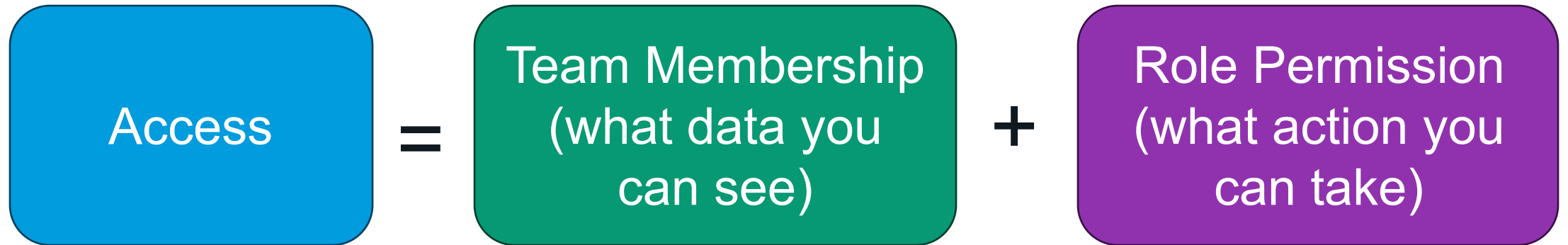
- If a user's role restricts their access to a field that is used in a report, the user will not be allowed to see any information on the report.



Putting It All Together

How Teams & Roles Combine for Secure Access Control

Teams + Roles = Access



Scenario: Sales Rep vs. Sales Manager

- Sales Rep: East Coast team, limited role (view-only)
- Sales Manager: East & West Coast teams, full access

- Different team + role combinations = different access levels



Pitfalls

Pitfall: No Access?

- User sees no data
 - Often missing team or too restrictive role(s)
- ✓ Always check both team and role assignments

Pitfall: Too Much Access?

- Overlapping roles
 - Sugar applies the most restrictive rule
- ✓ Minimize overlap unless intentional



Scaling Tips

Scaling Tip: Plan for Growth

- Group by function, not individual
- Define role templates
- Assign teams by region or department

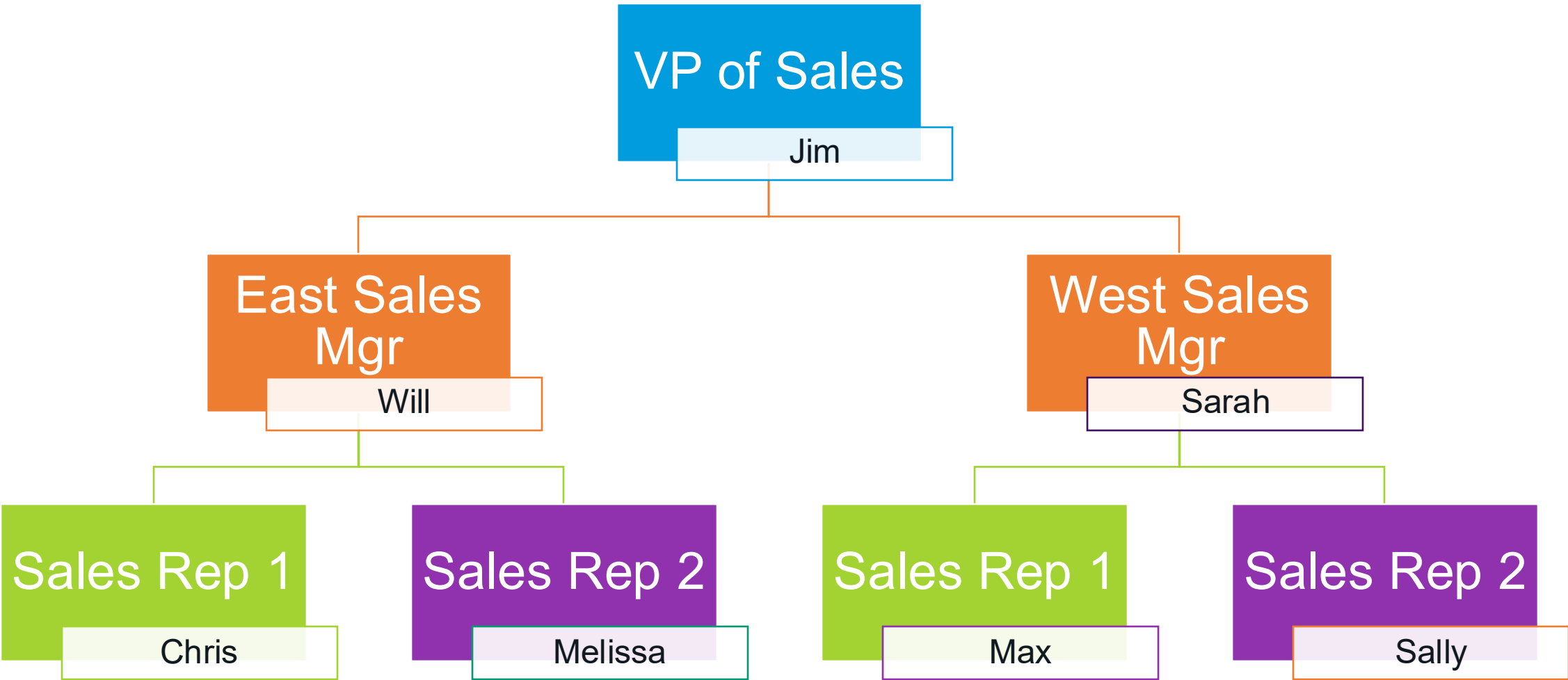
Scaling Tip: Document Everything

- Track role/team assignments
 - Use spreadsheets or other tools
- ✓ Useful for audits and onboarding

Scaling Tip: Review Regularly

- People and teams change
 - Review access quarterly
- ✓ Prevent gaps or over-permission

Demonstrate: How to Create a Role

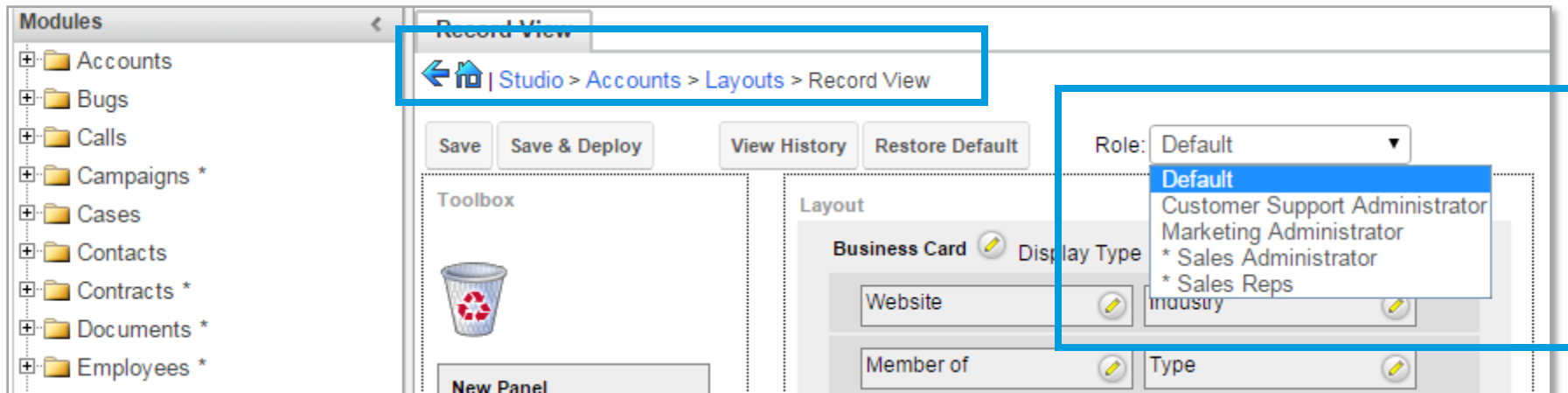




Role-Based Views and List Vales

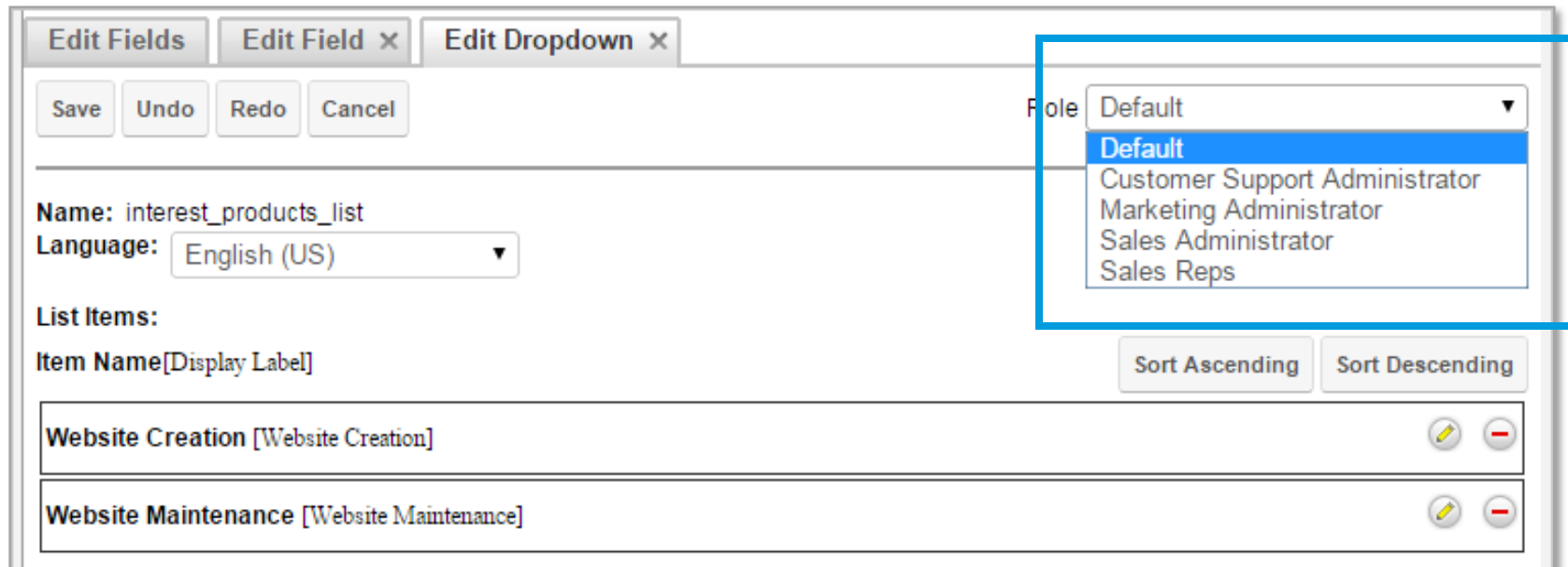
Creating Role-Based Views

- Allows Administrators to display different Layouts for specific Roles
- Only available for Sidecar Record Views and Mobile Edit and Detail Views



Role-Based Dropdown List Values

- Allows Administrators to show or hide certain values in List of Value data types (DropDown, MultiSelect, and Radio) for specific roles.
- Access through Studio or Dropdown Editor
- Role field only activated on saved list of values



The screenshot shows the 'Edit Dropdown' configuration window in SugarCRM. The window has three tabs: 'Edit Fields', 'Edit Field', and 'Edit Dropdown'. The 'Edit Dropdown' tab is active. At the top, there are buttons for 'Save', 'Undo', 'Redo', and 'Cancel'. Below these, the 'Name' is set to 'interest_products_list' and the 'Language' is set to 'English (US)'. A 'Role' dropdown menu is open, showing a list of roles: 'Default', 'Customer Support Administrator', 'Marketing Administrator', 'Sales Administrator', and 'Sales Reps'. The 'Default' option is currently selected. Below the role dropdown, there are 'Sort Ascending' and 'Sort Descending' buttons. The main area of the window displays a list of items with their display labels and edit/delete icons. The items are:

Item Name [Display Label]	Actions
Website Creation [Website Creation]	[Edit] [Delete]
Website Maintenance [Website Maintenance]	[Edit] [Delete]



Team-Based Permissions

What are Team-based Permissions?

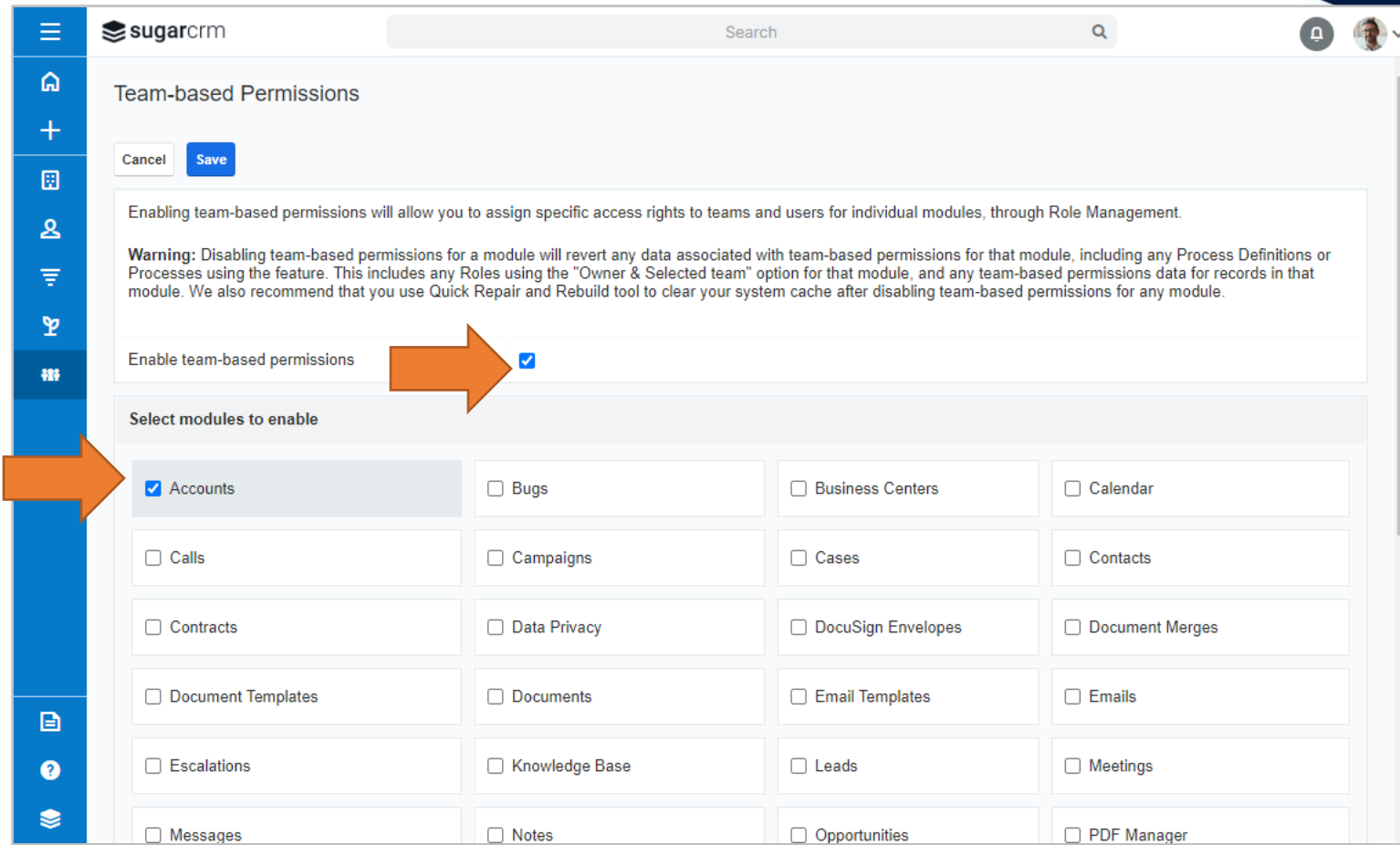
- It extends teams to control who can perform certain operations (edit, delete, etc.) on a record.
- When enabled, regular users can grant access to specific users or user groups to view, edit, export, import, and delete that record.

Team-based Permissions

The screenshot displays the SugarCRM Administration interface. At the top, there is a search bar and a user profile icon. The main content area is divided into three sections: 'Users', 'System', and 'Email'. The 'Users' section contains a search bar and a list of options: 'User Management', 'Team Management', 'Password Management', 'Role Management', and 'Team-based Permissions'. An orange arrow points to 'Team-based Permissions'. The 'System' section contains a list of options: 'System Settings', 'Import Wizard', 'Locale', 'Currencies', 'Languages', 'Repair', 'Search', 'Diagnostic Tool', 'Connectors', 'Tracker', 'Scheduler', 'PDF Manager', 'Archive Records', 'Mobile', 'Web Logic Hooks', 'OAuth Keys', 'Content Security Policy Settings', and 'Sugar Updates'. The 'Email' section contains a list of options: 'System Email Settings', 'Inbound Email', 'Related Contacts Emails', 'Campaign Email Settings', 'Email Queue', and 'Email Archiving'.



1. Enabling Team-based Permissions



* Recommendation is to limit this feature to only a subset of modules versus the entire system due to performance impact.



3. Modifying the Role at the Field-Level

The screenshot shows the SugarCRM interface for configuring a role. The role name is "Customer Support Administrator" and its description is "Customer Support Administrator Role". The "Accounts" section shows the role is "Enabled" with "Admin & Developer" access type. The "Field Permissions" section is currently being edited, with a dropdown menu open for the "Type" column. The dropdown options are: "Not Set", "Read/Write", "Read/Owner Write", "Read/(Owner & Selected Teams) Write", "Read Only", "Owner Read/Owner Write", "(Owner & Selected Teams) Read/Owner Write", "(Owner & Selected Teams) Read/(Owner & Selected Teams) Write", and "None".

Access	Access Type	Delete	Edit	Export	Import	List	Mass Update
Enabled	Admin & Developer	Not Set	Not Set	Not Set	Not Set	Not Set	Not Set

Field Name	Type	Permissions
Annual Revenue	Not Set	Not Set
Assigned to	Not Set	Not Set
Business Center ID	Not Set	Not Set
Business Center Name	Not Set	Not Set
Campaign	Not Set	Not Set
Description	Not Set	Not Set
Smart Guide Template	Not Set	Not Set
Email Address	Not Set	Not Set
Other Email	Not Set	Not Set
Facebook Account	Not Set	Not Set
Following	Not Set	Not Set
Company Facebook	Not Set	Not Set
Company Facebook	Not Set	Not Set
Year Founded	Not Set	Not Set
Year Founded	Not Set	Not Set
Industry Tags	Not Set	Not Set
Industry Tags	Not Set	Not Set
Logo	Not Set	Not Set
Logo	Not Set	Not Set



4. Modifying the Record Team Permissions

Ac Cloud Cover Trust ☆ Cancel Save

Website <http://www.cloudcovertrus...> Industry Transportation

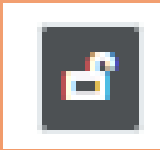

+ Member of Type Customer

Business Ce... [NA Business Center](#) Service Level Tier 1

Office Phone [+1 - 992 - 611 - 3582](#) Email Addre... [info@cl...](#)

Teams East ☆ 🔒 -
 We... ☆ 🔓 - +

Assigned to [Chris Olliver](#)

Team Setting	Appearance	Button	Description
Additional Permission Enabled	Black button with open lock		Members of this team have extra access to this record or field within the record as controlled by their roles
Additional Permission Disabled	White button with a closed lock		Members of this team have no additional team-based permissions as controlled by their role

More Information on Team-Based Permissions

Home / Help Articles / Studio and Module Builder

Creating Role-Based Dropdown Lists

Overview

Role-based dropdown lists enable administrators to control the dropdown options that are available for users to select when creating or editing records. The options users should be able to select may vary among users depending on their function in the organization. For example, users associated with the marketing or sales roles may see more sales-related dropdown values than users in a customer support role. This article covers how to create a role-based dropdown list and modify the list of options available for users to select based on their assigned role.

Administrators can also create role-based record views to define customized layouts for users depending on their assigned role. For more information, please refer to the [Creating a Role-Based Record View](#) article.

Note: Role-based dropdown lists are only available for [Sidecar modules](#). For more information on role-based dropdown lists in Sugar, please refer to the [Developer Tools](#) documentation.

Use Case

As an example, we will create a dropdown field on the Accounts module called "Customer Type" where users assigned to the "User Role"

DETAILS

Products

Sell Serve Ent

Versions

25.1 14.2 14.0 13.0

Content Levels

Administrator

Deployments

SugarCloud On-Site

[Link](#)



Questions & Answers

Let's Tackle Your Real-World Scenarios.

Resources to Keep Learning



**Team Management
Admin Guide**






**Role Management
Admin Guide**



**SugarU Course:
Sugar Admin Fundamentals**


What's Next in SugarU Live? Coming Up Next

-  *Turbocharging Manufacturing Success with Sugar Sell* – August 21
-  Learn how Sugar Sell helps manufacturing leaders streamline sales team management, improve visibility, and drive results in complex, high-stakes sales environments.
-  1 Subscribe to the SugarClub page for updates





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