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Boosting Efficiency with Action Buttons in Sugar

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SugarU Live Webinar Series

Action Button

What is an Action Button?

- Custom buttons added to records for quick actions.
- Shortcuts to perform a tasks within records
- Easily extended using Sugar Logic and SugarBPM
- Created in Studio as a Field Type
- Can be displayed in records, in record headers, or both

Why use Action Buttons?

- Quickly customize business workflow and navigation without having to write any code
- Boosts user productivity
- Streamline Workflow
- Improved user experience

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Key Take-Aways

- How to create and configure Action Buttons
- Real-world use cases to simplify daily tasks
- Tips for boosting automation and workflow efficiency

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Create & Configure Action Buttons

For Sugar Administration

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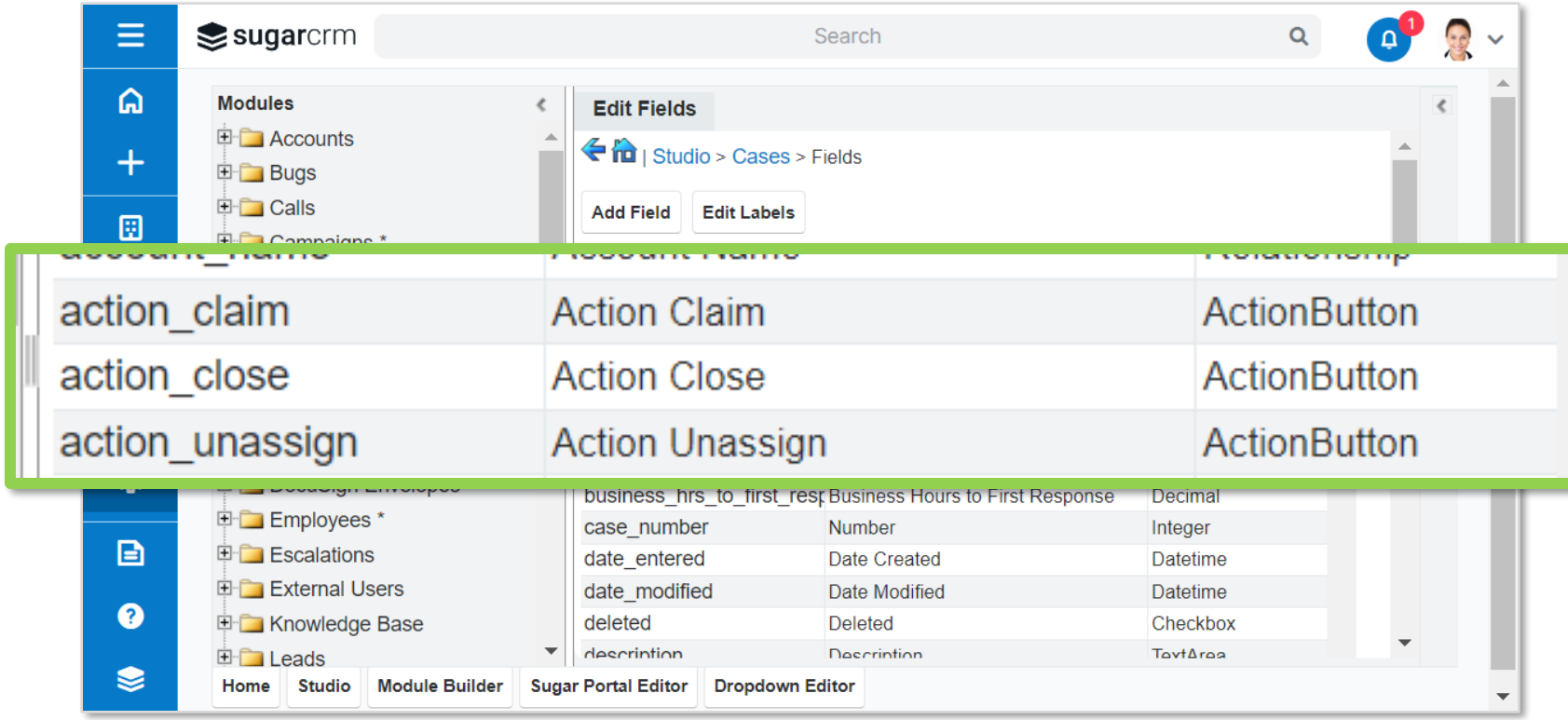
Current Stock Action Buttons in Sugar

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.



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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Best Practices for Creating Action Buttons

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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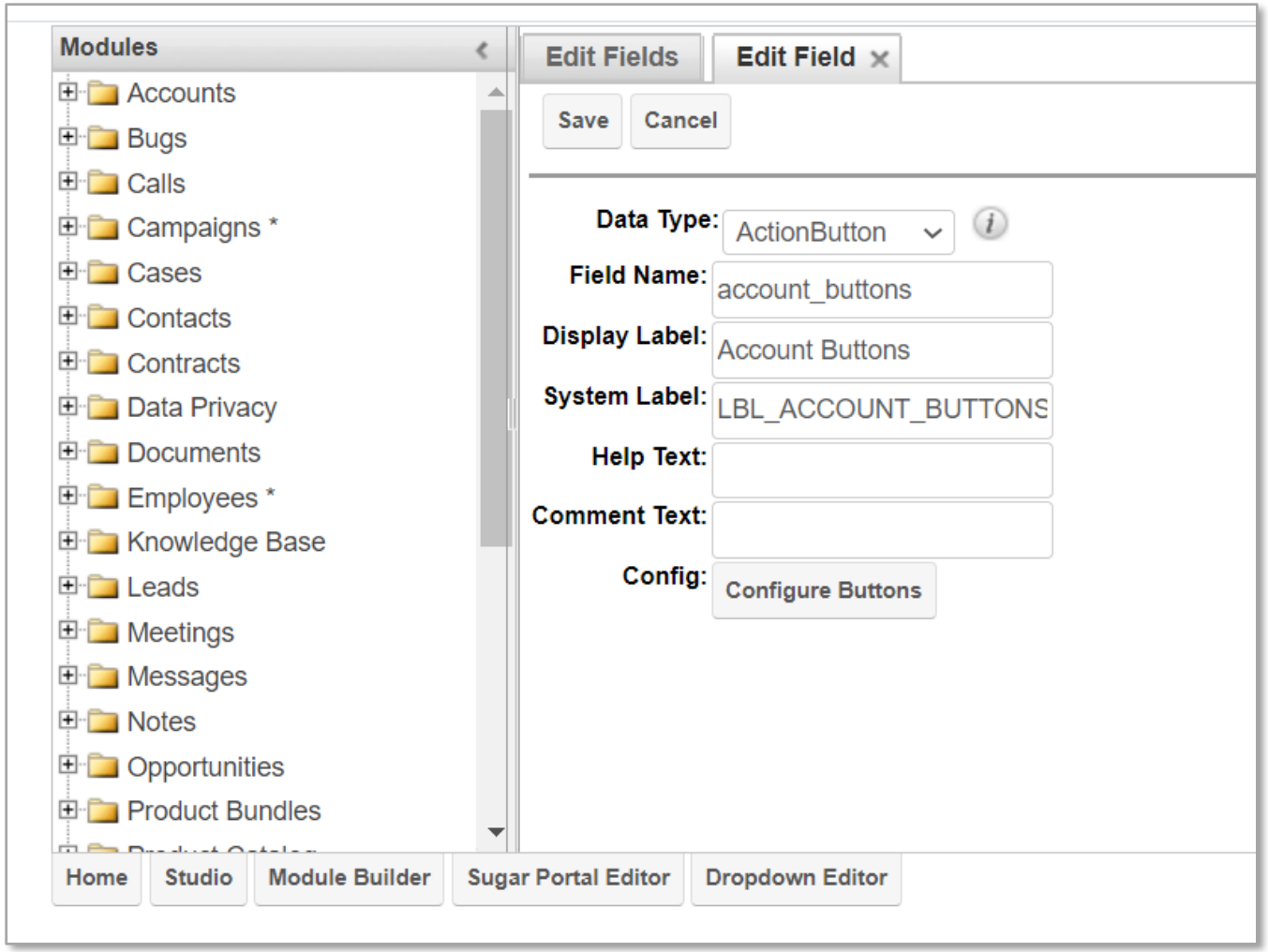
Step 1: New Field with Data Type ActionButton

- Action Button is a field type that can add one or more buttons to dashlet and Record View (included in the header or in the layout)
- Enter the …
  - Data Type=ActionButton
  - Field Name: Accounts_Buttons
  - Click Configure Button



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Step 2: Configure Action Buttons - Action

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Search all of Sugar...

Accounts button

Cancel Save

Pricing List

Properties

Button Text: Pricing List

Tooltip:

Show Button Text: ☑

Show Icon: ☑

Color Scheme: Purple

Icon: sicon-star-outline

Dependent: ☐

Stop on Error: ☐

ACTION

Action: Open Url

Calculated: ☐

URL: https://www.sugarcrm.com/pricing/

Layout Configuration

Buttons | Action Menus

Preview

Pricing List

Display Settings

Type: Button

Size: Default

Record View Header

☑ Display Label on Record

☑ Display Button on Record View Header

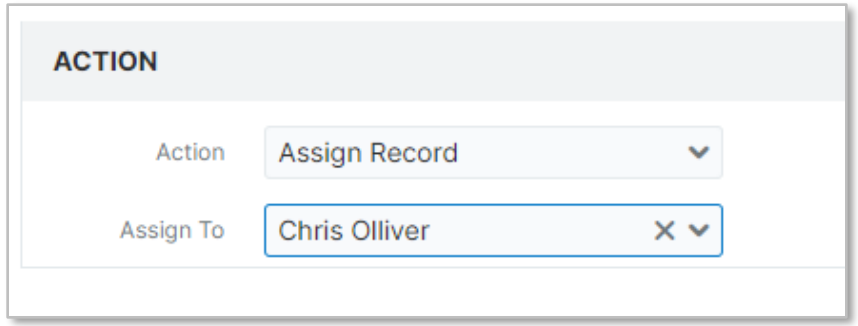
☐ Hide on Record View Edit

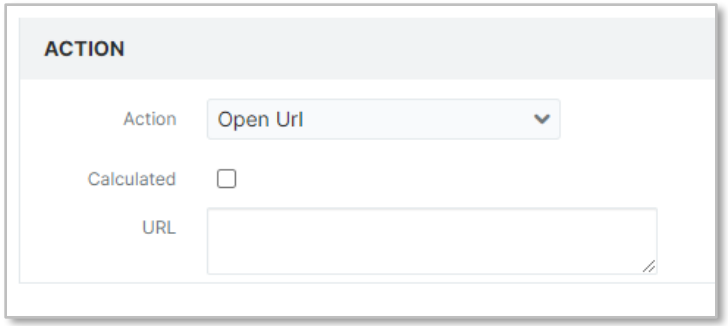
Dashboard

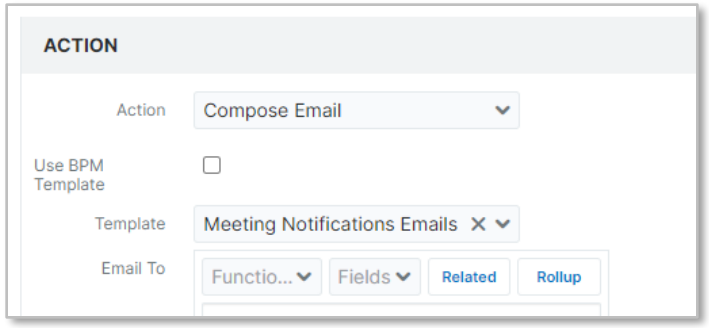
☑ Display on Focus Dashboard Header

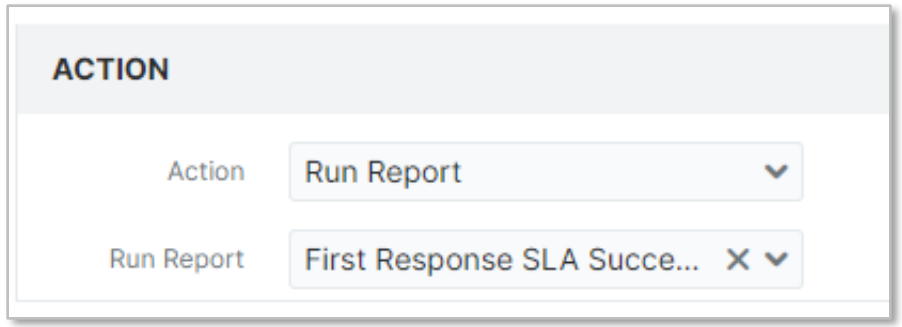
Action Types

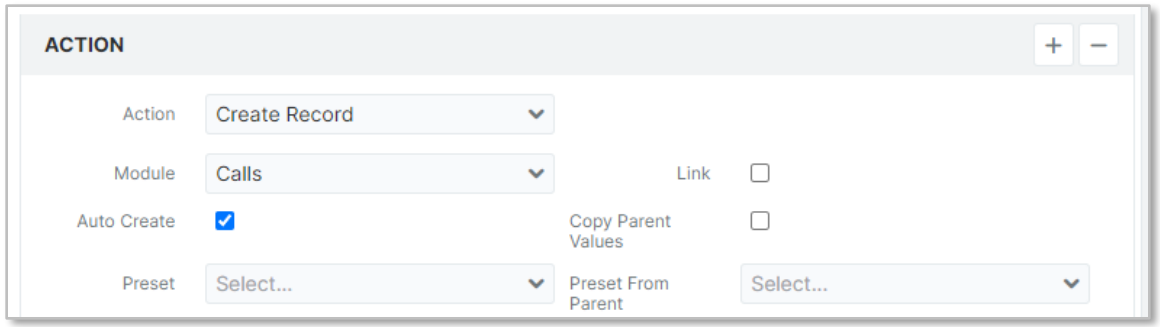
- Assign record
- Compose Email
- Create Record
- Doc Merge
- Open URL
- Run Report
- Update Records

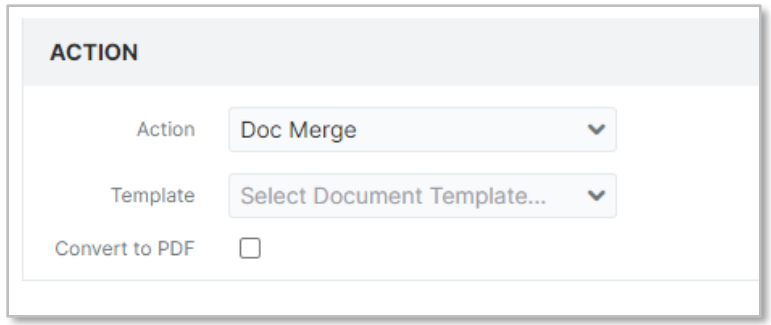


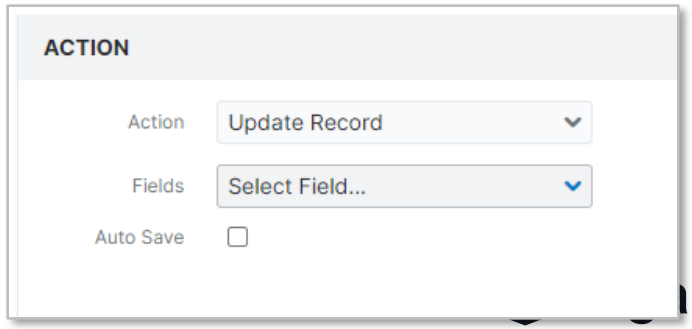












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Step 2: Configure Action Buttons - Properties

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Search all of Sugar...

Accounts button

Cancel Save

Pricing List

Properties

Button Text: Pricing List

Tooltip:

Show Button Text: ☑

Show Icon: ☑

Color Scheme: Purple

Icon: sicon-star-outline

Dependent: ☐

Stop on Error: ☐

ACTION

Action: Open Url

Calculated: ☐

URL: https://www.sugarcrm.com/pricing/

Layout Configuration

Buttons | Action Menus

Preview

Pricing List

Display Settings

Type: Button

Size: Default

Record View Header

☑ Display Label on Record

☑ Display Button on Record View Header

☐ Hide on Record View Edit

Dashboard

☑ Display on Focus Dashboard Header

Step 2: Configure Action Buttons - Layout

sugarcrm

Search all of Sugar...

Accounts button

Cancel Save

Pricing List

Properties

Button Text: Pricing List

Tooltip:

Show Button Text: ☑

Show Icon: ☑

Color Scheme: Purple

Icon: sicon-star-outline

Dependent: ☐

Stop on Error: ☐

ACTION

Action: Open Url

Calculated: ☐

URL: https://www.sugarcrm.com/pricing/

Layout Configuration

Buttons | Action Menus

Preview

Edit

Display Settings

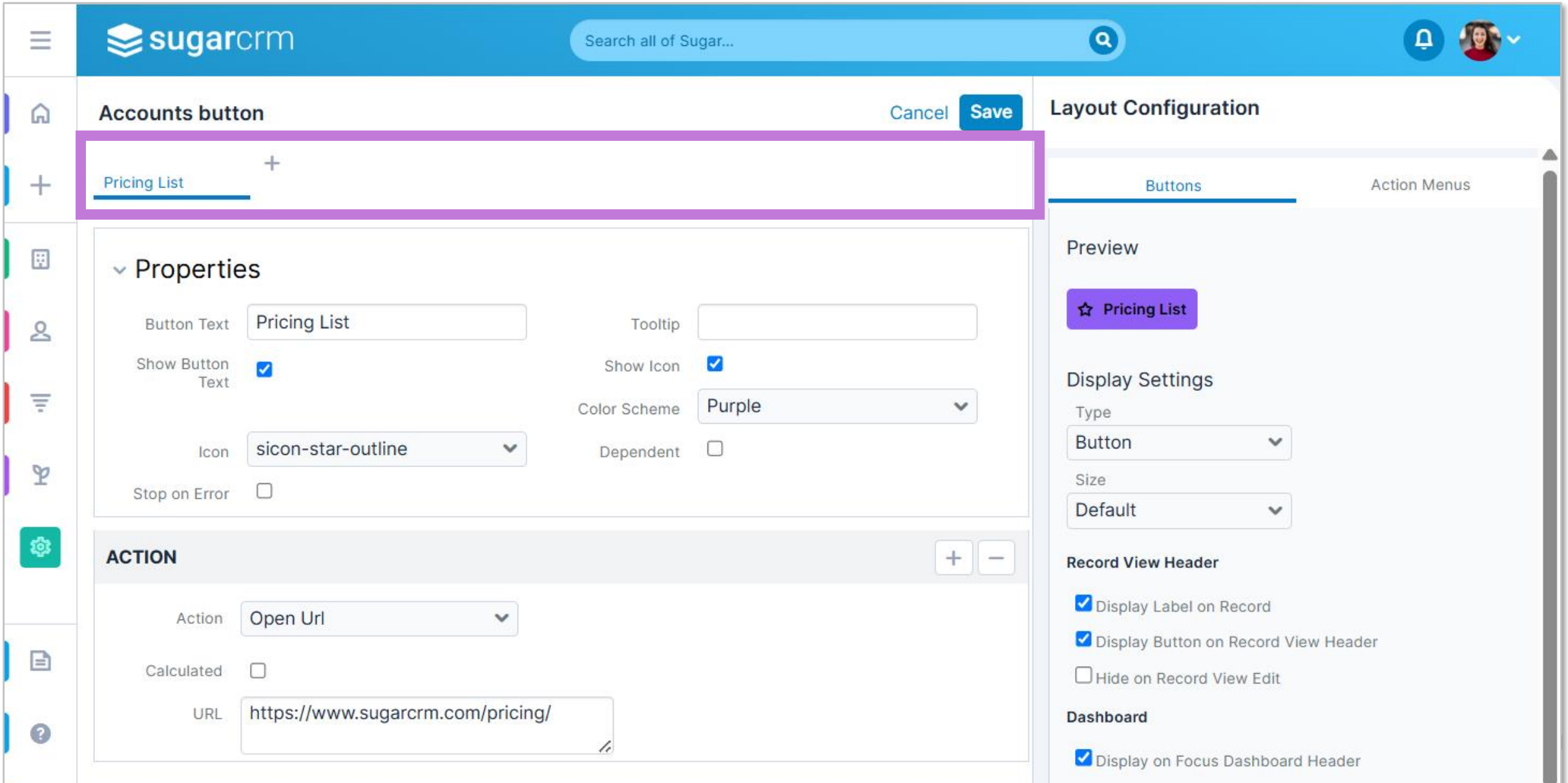
- ☑ List View
- ☑ Subpanels
- ☑ Record View Header
- ☑ Record View Dashlet Header
- ☑ Focus Dashboard Header

Order

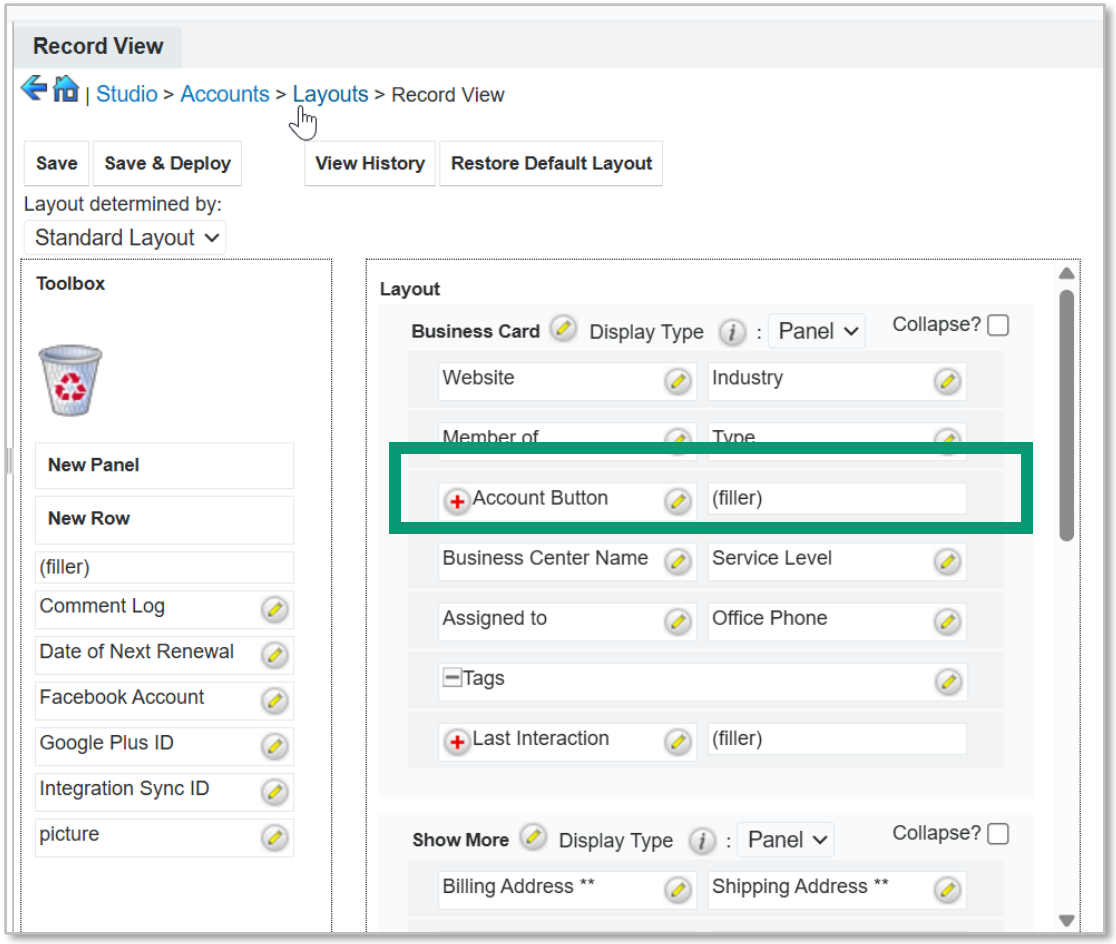
1

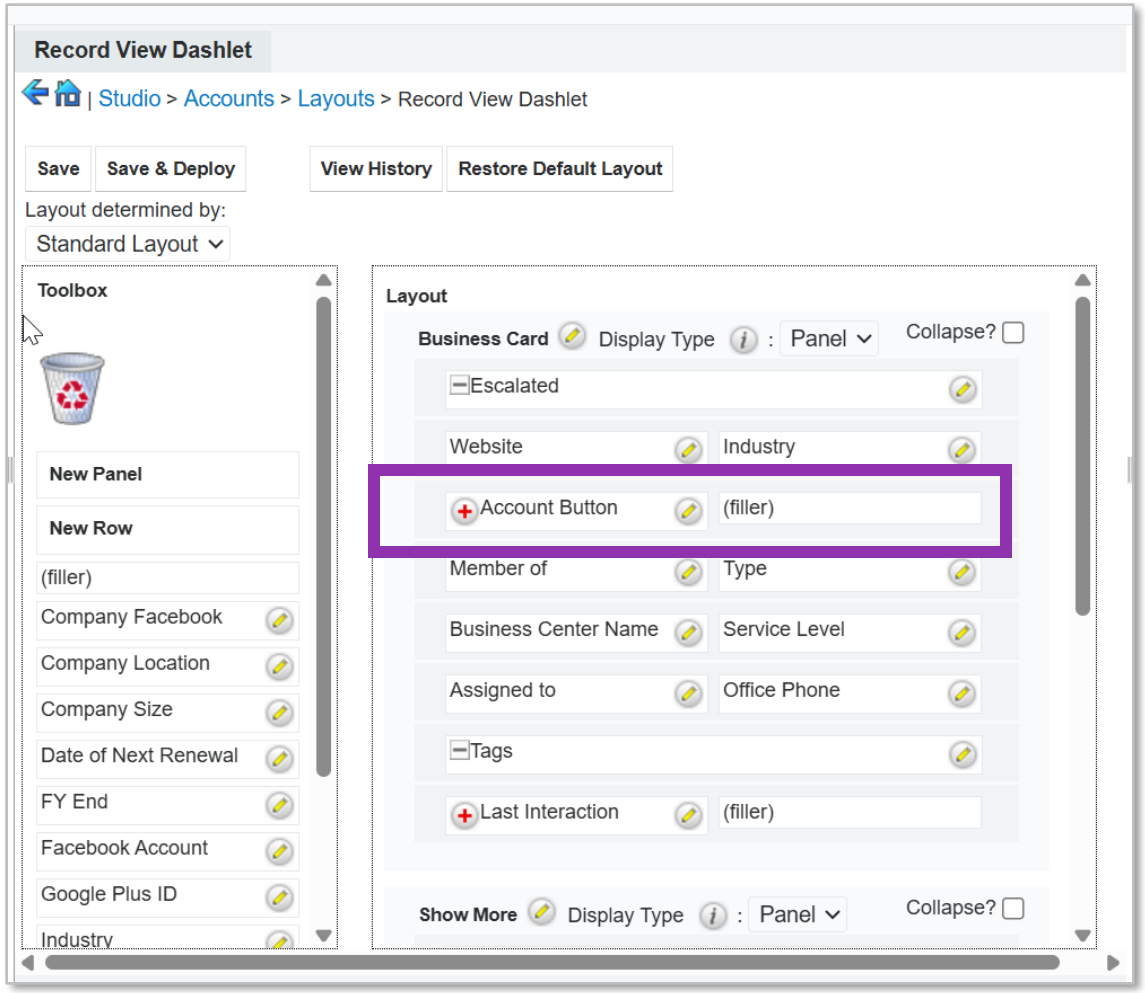
© 2

Step 2: Configure Action Buttons – Multiple Buttons



Step 3: Configure Action Buttons – Add Button(s) to Layouts





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Demonstrate Action Buttons

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Real-World Use Cases to Simplify Daily Tasks

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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

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Demonstrate Real-Life Action Buttons

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Tips for Boosting Automation and Workflow Efficiency

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Key Benefits for Automation & Workflow

Benefit	Example
One-Click Task Execution	Automate multi-step processes with a single button press. A “Mark as Won” button for Opportunities updates status, sets a close date, and triggers a follow-up task automatically.
Standardized Actions Across Users	Ensures that all users perform tasks in a consistent way, reducing human error and training time. Useful in compliance-heavy industries where standardized processes are crucial.
Workflow Triggers	Buttons can be tied into **SugarBPM** so clicking a button launches workflows (e.g., approval chains, notifications, or record escalations).
Conditional Logic	Buttons can appear or behave differently based on field values or user roles, ensuring that only relevant actions are available — keeping the UI clean and focused.
Improved User Experience	Reduces time spent navigating menus or modules. Encourages adoption by making the system more intuitive and responsive to real-world use cases.

Demonstrate Tips for Boosting Automation & Workflow Efficiency with Action Buttons

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Questions

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Resources

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Additional Resources

- Sugar Administration Guide
  - Developer Tools > Studio > Fields > Action Buttons and SugarLogic
  - SugarBPM > Process Definitions> Creating Process Definitions
- Help Articles
  - Creating Action Buttons
  - Understanding Action Buttons vs wTools Custom Buttons
- SugarClub
  - “Hidden” Features Series: The Power of Action Buttons
  - “Quick Tips” Action Button Example Use Cases

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Upcoming Webinars in This Series

- May 22 – Mastering Lead Management
- June 19 – Dashboard Mastery: Setting Up Powerful Insights
- July 17 – Strengthening Security: Mastering Teams & Roles
- August 21 – Turbocharging Manufacturing Successful with Sugar Sell

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SugarU Classes

Sugar Admin Fundamentals

Introduction to SugarBPM

Optimize with SugarBPM (Intermediate)

Sugar Reports

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Thanks for attending.

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