

## Podcast Script – Email in Sugar 5.0

Welcome to this sixty second Sugar snippet. My name is Jennifer, and I am on the Product Management team at SugarCRM. Today I'd like to talk about the new features in the 5.0 version of the Emails module in the Sugar application, and how the 5.0 version differs from the earlier versions.

In 5.0, we made both functional and user interface enhancements in the Emails module. The 5.0 Emails module contains all of the functionality of the 4.5.1 and previous releases, and several new features that increase the value of the module.

Common features and functionality between the Emails module in 5.0 and previous releases include the ability to create and use email templates and signatures, the ability to quickly create records from emails, automatic association with existing contacts and leads through the email address, and an HTML editor for composing emails that can contain attachments and embedded images.

The target users for the new Emails module are power users of the application. These are folks who spend a great deal of time within the records in the application, such as Sales Representatives and Support Engineers. For those users, it can be more convenient to view and manage their email accounts directly in the application, and they can easily import and relate emails to records in the system.

The user interface enhancements in 5.0 were made to accommodate the new features. Users of the Emails module in previous releases will notice the difference in the look and feel of the module right away. The new Emails module looks and functions more like a web-based email client, such as Yahoo! Mail.

Added functionality includes the ability to view multiple email accounts and to selectively import emails into the application. These features benefit users who have more than one email account for which they would like to import and relate the emails to relevant records in the application.

The ability to organize imported emails in folders is new. Group Folders are also new. They allow users across specified teams to view and take action on the emails within them.

In the Professional and Enterprise editions, the Address Book is a feature that allows users to create mailing lists containing contacts, leads and/or users.

The main difference between 5.0 and prior versions is that in prior versions, users could only set up one inbound mail account for their inbox, and all emails viewed in the inbox were automatically imported into the Sugar system. The community told us that this was often undesirable, however, because sometimes mail that you don't wish to be imported, like spam, was also included. So, in 5.0, users can choose which emails to import into the Sugar application (although it's still possible, using the Group Mail Account feature, to

automatically import all email). And, as I said earlier, multiple email addresses can be set up for this purpose.

Setting up group mail accounts for the automatic importing of emails is done slightly differently in 5.0, and involves linking the group mail account to a Group Folder. Group Mail Accounts and Group Folders can only be set up by administrators.

The pre-5.0 user interface for imported emails contains a search, list view, and mass update panel. The old interface is still accessible through the All Emails link in the Shortcuts panel in the 5.0 Emails module. It allows you to search and view all imported emails to which you have access through team and assignment security.

In the new interface, imported emails are viewable within Group Mailboxes, the My Emails folder and any local folders that you create to organize your email. You can search for emails on the email servers as well.

We are developing a webcast and other Sugar University training courses that will give you a better understanding of the new 5.0 Emails features and help you maximize them for your organization. We'll put an announcement in the Sugar Forums when these items are posted.

And that's your sixty second Sugar snippet. Goodbye!