Dynamic Target Lists v2.1

Dynamic Target Lists for SugarCRM

Documentation

Auto-populate SugarCRM Target Lists. An upgrade-safe enhancement to SugarCRM Target List system. SugarCRM users can now create Target Lists containing data based on pre-defined SQL queries and keep the list up to date on a schedule.

Release

V2.1

Compatibility

SugarCRM CE, Pro, Enterprise, Ultimate version 6.5.x – 7.2.x

Contents

Download and Purchase

Dynamic Target Lists enhancement is available to purchase and download from
https://www.sugaroutfitters.com/addons/dynamic-target-lists-for-sugarcrm&tag=fibrecrm

A free trial is available before purchase.

Disclaimer

Whilst this module is upgrade safe, do back up your site before applying this installation. Installation of this module is at your own risk and FibreCRM takes no responsibility for loss of data or disruption in operation.

Installation Process

Once you add the Dynamic Target List module to your cart on SugarOutfitters.com and pay using either your Credit Card or PayPal, you will be redirected and provided a license key. You will use this license key later in the installation process.

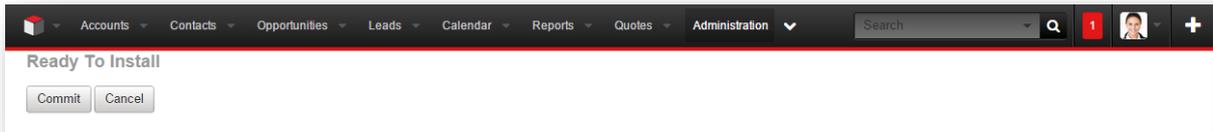Having downloaded the module proceed to the Module Loader in SugarCRM.

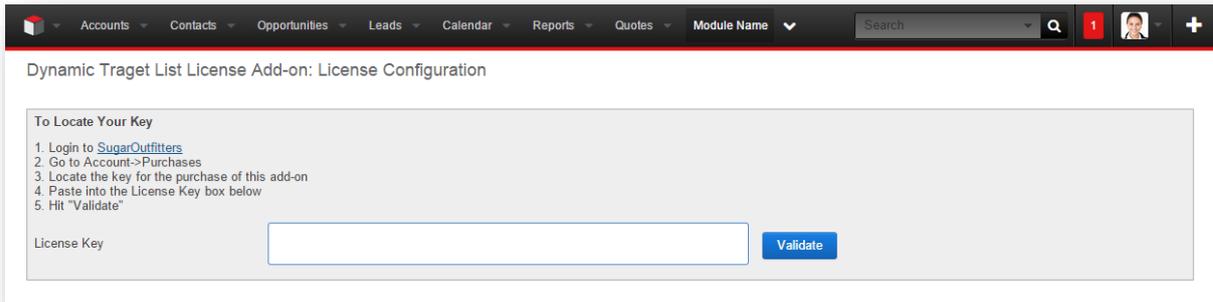Step 1 – Access SugarCRM Module Loader
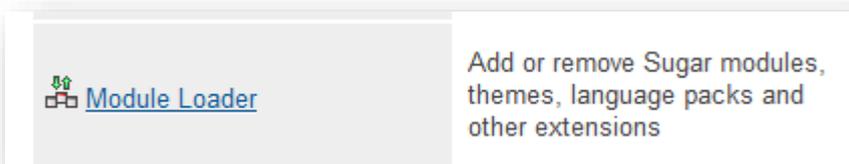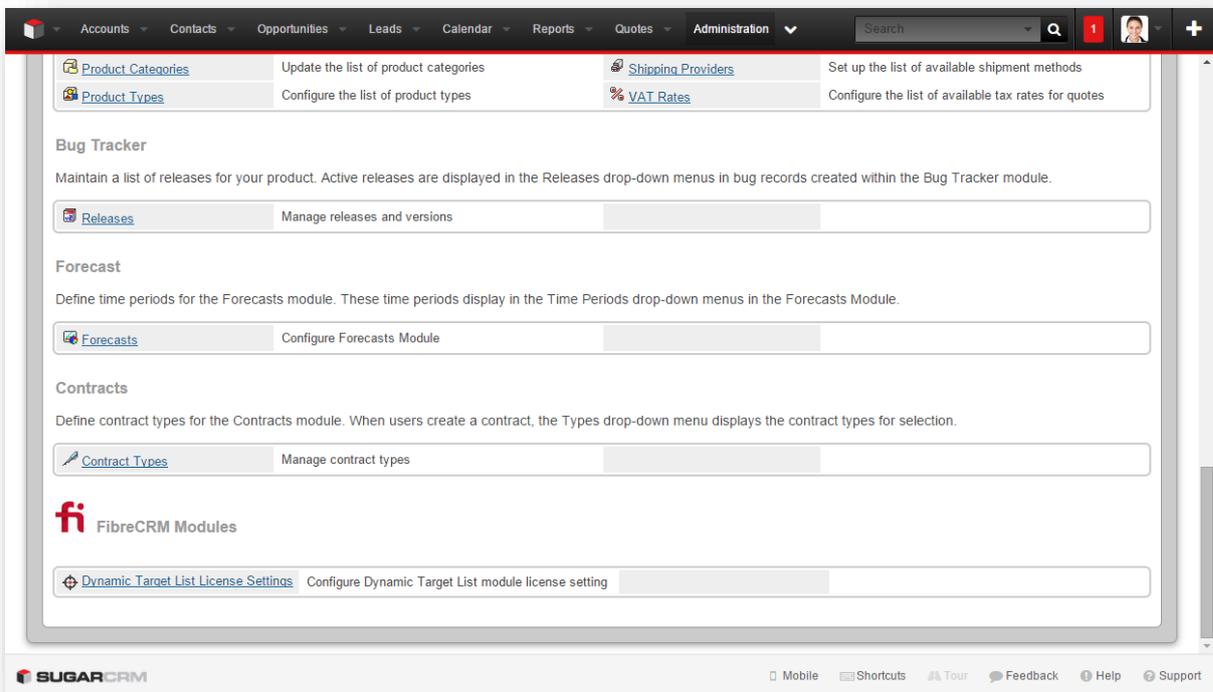

Step 2 – upload module zip file
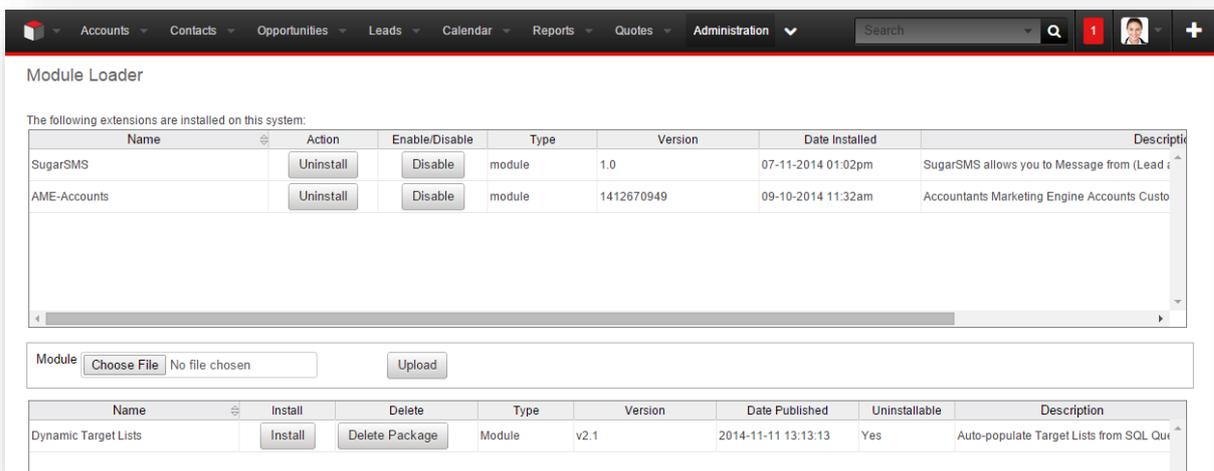
Step 3 – Install module

Step 5 – Continue to license entry

The module is now installed. However for it to work you will need to apply your license key if you have one. If you have a key apply it now or if not then you can add it later from the Admin module.
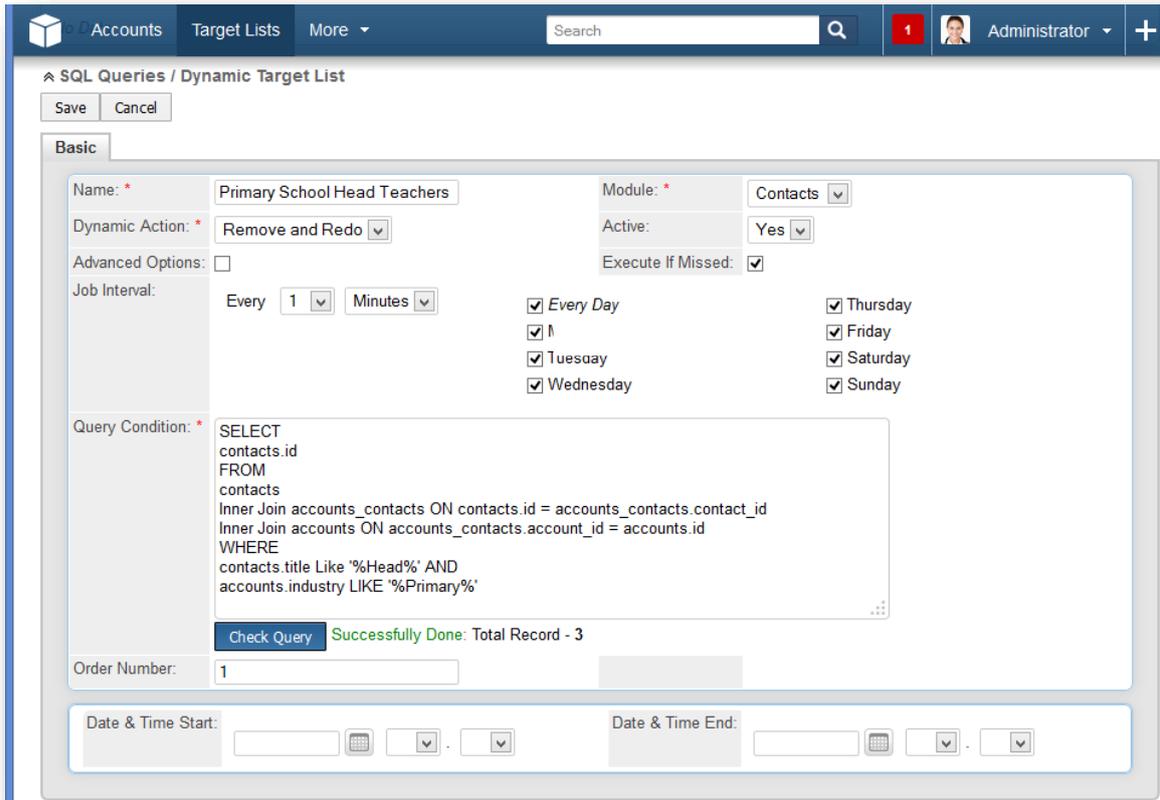
User Guide

Once installed navigate to any Target List or create a new one. Once you have a list in view (Detail View), you will see a new Sub Panel at the bottom of the screen called "SQL Queries / Dynamic Target List"
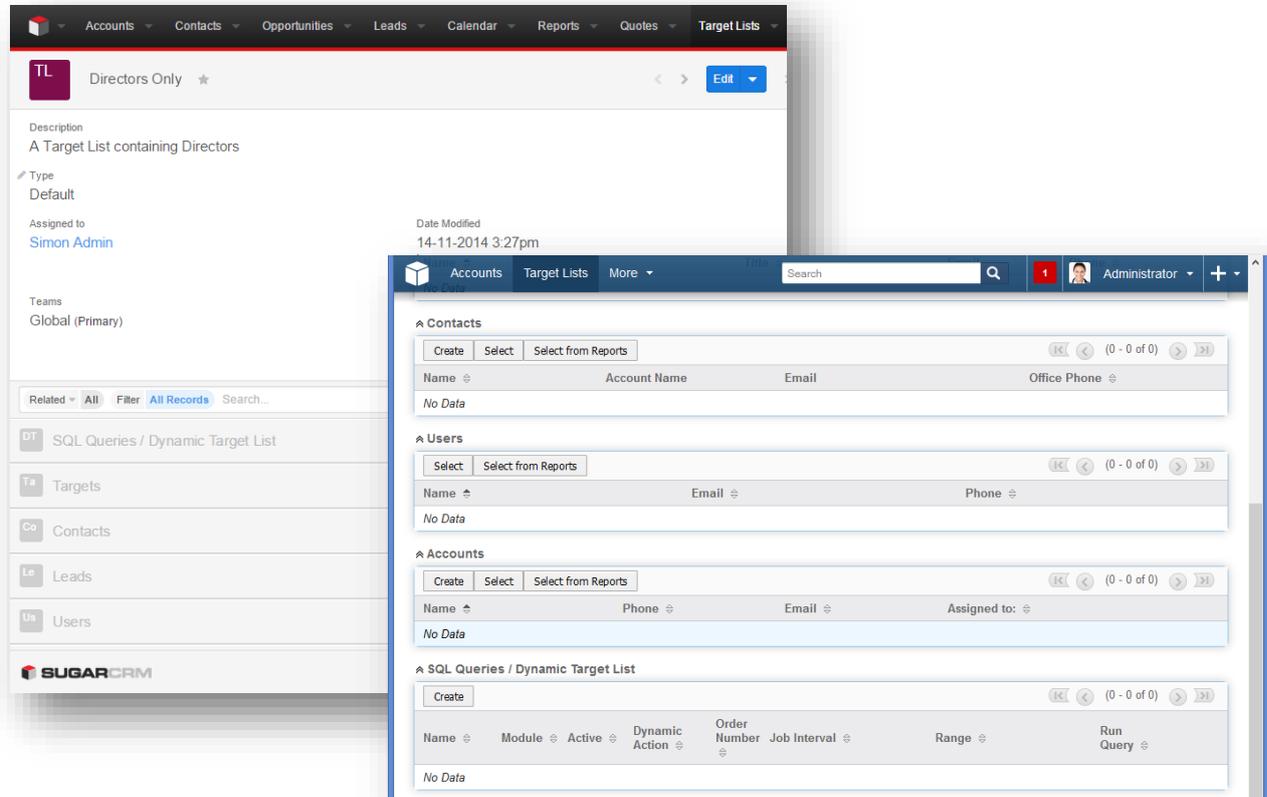
Create a query…

Label	Description/Purpose
Name	A descriptive title you give to this query
Dynamic Action	Append – adds records to the list Remove and Redo – Query removes records added in previously run queries and re-runs the query. This only removes those records that were added as part of this query condition. It does not remove records that may have been added by another query Remove – removes records from the list
Advanced Options	Enter the crontab values instead of using the Job Interval
Job Interval	Visually set the time period(s) when this query will be executed
Query Condition	Allows SELECT statements only. Enter the SQL query that should be run including a where clause. If you're not sure how to write the query, contact a SugarCRM specialist or call us to help you. We have included some examples at the end of this document to help you get started. CHECK QUERY – This checks the query does not contain errors and shows the potential count of records that would meet the criteria
Order Number	The order in which one or more queries will be run. i.e. one query maybe to add data while another maybe to remove and you might want the removal query to be run second (e.g. Query 1 - Add all Contacts where a Call is Planned, Query 2 – Remove Contacts where a Case exists. For this example to work, you would need to set the order/sequence of queries)
Module	This is the Target List subpanel that will be populated with the results of the query. Make sure it makes sense (e.g. Don't try and populate the Accounts module from a query that is selecting Leads)
Active	Turn on/off this query
Date & Time Start	You can set a time when this query will start to be executed
Date & Time End	You can set a time when this query will stop being executed

Save the record…

The query will now run at the specified times. If you would like to run the query now click on the "Run Query" button.

You can create more queries.

And here is the result of the query after it has run

Contacts

Create	Select	Select from Reports

(1 - 3 of 3)

Name ⇕	Account Name	Email	Office Phone ⇕	
Heidi Byrne	City of Bath College	hr97@example.net	(569) 585-9973	edit ▾
Gerardo Castleman	Derby College	hr65@example.co.uk	(263) 656-7145	edit ▾
Christie Nealy	City of Westminster College	qa23@example.name	(563) 754-0668	edit ▾

Users

Select	Select from Reports

(0 - 0 of 0)

Name ⇕	Email ⇕	Phone ⇕
No Data		

Accounts

Create	Select	Select from Reports

(0 - 0 of 0)

Name ⇕	Phone ⇕	Email ⇕	Assigned to: ⇕
No Data			

SQL Queries / Dynamic Target List

Create

(1 - 1 of 1)

Name ⇕	Module ⇕	Active ⇕	Dynamic Action ⇕	Order Number ⇕	Job Interval ⇕	Range ⇕	Run Query ⇕	
Primary School Head Teachers	Contacts	Yes	Remove and Redo	1	As often as possible.		Run Query	edit ▾

Use Cases and Examples SQL Queries

Use Case 1:

I want to keep a list of 'directors' up to date. Whenever a new director is added to the CRM or if their title changes, I want the list to be updated.

Query conditions:

Title contains "Director"

Tables in query: Contacts

> *SELECT*
> *id*
> *FROM*
> *contacts*
> *WHERE*
> *title like '%director%'*

Dynamic Action: Remove and Redo (just in case someone in your list is no longer a director you may want them removed from the list)

Use Case 2:

As a sales rep, I want to be able to keep a list up to date with all Decision Makers in My Large Accounts so that I can keep in touch through email and telephone calling plans.

Query conditions:

Decision Makers = Maybe this is a custom dropdown field called "Role" at Contact level
Large Accounts = Maybe this is the size of the Account in terms of number of employees (500+ employees)
My Accounts = This would be the Accounts Assigned To me (you can find out your userID from the URL when accessing your Profile. E.g.
http://yoursugarcrm/index.php?module=Users&action=EditView&record=**4fma4270-7900-2871-9c75-4efc4f341ad0**

Tables required in query: Contacts, Contacts_cstm, Accounts, Accounts_Contacts

> *SELECT*
> *contacts.id*
> *FROM*
> *contacts*
> *Inner Join contacts_cstm ON contacts.id = contacts_cstm.id_c*
> *Inner Join accounts_contacts ON contacts.id = accounts_contacts.contact_id*
> *Inner Join accounts ON accounts_contacts.account_id = accounts.id*
> *WHERE*
> *contacts_cstm.role_c = 'Decision Maker' AND*
> *accounts.assigned_user_id = '<enter the user id here>' AND*
> *accounts.employees > 500*

Troubleshooting

- Query returns "Database failure. Please refer to sugarcrm.log for details"
  - When you run a query you see the above message. This is likely down to the SQL query being written incorrectly. Please check it carefully. There will be information about the error in the sugarcrm.log file which you can access from Admin | Diagnostics

- Save button doesn't work
  - The query may be malformed or incorrect.
  - Try running a Quick Repair & Rebuild