

## 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

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### Download and Purchase

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

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

e following extensions are installed or Name	this system:	ction	Enable/Disable	Туре	Version	Date Inst	alled	Descriptio
ugarSMS	Uni	nstall	Disable	module	1.0	07-11-2014 01:0	2pm Suga	arSMS allows you to Message from (Lead a
ME-Accounts	Uni	nstall	Disable	module	1412670949	09-10-2014 11:3	2am Acco	ountants Marketing Engine Accounts Custo
								×
Adule Choose File No file chos	in		Upload					*
Aodule Choose File No file chos Name ⇔	install		Upload	Туре	Version	Date Published	Uninstallable	Description

Step 3 – Install module

## **fibre**CRM

-	Accounts 🤟	Contacts -	Opportunities –	Leads 👻	Calendar 👻	Reports 👻	Quotes 🤟	Administration	~	Search	٩	2 -	+
Ready	y To Install												
Comm	it Cancel												

### Step 5 – Continue to license entry

To Locate Your Key				
1. Login to <u>SugarOutfitters</u>				
<ol> <li>Go to Account-&gt;Purchases</li> <li>Locate the key for the purchase of this</li> </ol>	s add-on			
<ol> <li>Paste into the License Key box below</li> <li>Hit "Validate"</li> </ol>	1			

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.

a riodaer ouregones	Update the list of product categories	Shipping Providers	Set up the list of available shipment methods	
Product Types	Configure the list of product types	% VAT Rates	Configure the list of available tax rates for quotes	
Bug Tracker				
Maintain a list of releases fo	or your product. Active releases are displayed in the R	Releases drop-down menus in bug rec	ords created within the Bug Tracker module.	
Releases	Manage releases and versions			
Forecast				
Define time periods for the F	Forecasts module. These time periods display in the "	Time Periods drop-down menus in the	e Forecasts Module.	
- Forecasts	Configure Forecasts Module			
- I Diecasta				
	e			
Contracts				
Contracts Define contract types for the	e Contracts module. When users create a contract, th	ne Types drop-down menu displays the	e contract types for selection.	
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### 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...

## **fibre**CRM

Name: *	Dimen Ocheville d'Teachar		Madula: *				
Dynamic Action: *	Primary School Head Teachers		Activo:	Contacts	V		
Advanced Options:	Remove and Redo		Execute If Missed:	Tes V			
Job Interval:	Every 1 V Minutes V	♥ Every I ♥ N ♥ Tuesaa ♥ Wedne	Day ay esday		<ul> <li>✓ Thursday</li> <li>✓ Friday</li> <li>✓ Saturday</li> <li>✓ Sunday</li> </ul>		
Query Condition: *	SELECT contacts.id FROM contacts Inner Join accounts_contacts ON cont Inner Join accounts ON accounts_con WHERE contacts title Like "%Head%' AND accounts.industry LIKE "%Primary%'	tacts.id = accou ttacts.account_i	ints_contacts.contac d = accounts.id	:t_id			
	Check Query Successfully Done: To	otal Record - 3					

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...

Contacts									
Create	Select Selec	t from Repo	irts				K (	(0 - 0 of 0)	K
Name		A	ccount Name		Email	(	Office Phone	\$	
No Data									
Users									
Select 9	Select from Rep	orts					K (	(0 - 0 of 0)	(X)
Name 🔶			I	Email		Phone			
No Data									
Accounts									
Create	Select Selec	t from Repo	irts				K (	(0 - 0 of 0)	
Name 🔶			Phone		Email 😄	Assigned to: $\Leftrightarrow$			
No Data									
SQL Quer	ies / Dynam	ic Target I	List						
Create							K (	(1 - 1 of 1)	
	Module ≑	Active $\Leftrightarrow$	Dynamic Action ⇔	Order Number ≑	Job Interval ≑	Range $\Leftrightarrow$	Run Quer	у ⇔	
Name									

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

# **fibre**CRM

Contact	S								
Create	Select	Select from I	Reports				$\mathbf{K}(\boldsymbol{\boldsymbol{\zeta}})$	(1 - 3 of 3)	
Name			Account Name		Email	Offi	ce Phone		
Heidi Byrn	ie		City of Bath Colle	ge	hr97@example.net	(569	) 585-9973		edit 💌
Gerardo C	astleman		Derby College		hr65@example.co.uk	(263	) 656-7 <b>1</b> 45		edit 💌
Christie N	ealy		City of Westmins	ter College	qa23@example.name	(563	) 754-0668		edit 💌
Users									
Select	Select fro	m Reports					KK	(0 - 0 of 0)	
Name 🔶				Email 🔤		Phone 🔤			
No Data									
Account	ts								
Create	Select	Select from I	Reports				K (	(0 - 0 of 0)	> >
Create	Select	Select from I	Reports Phone 😄		Email	Assigned to: ⇔	<u> </u>	(0 - 0 of 0)	() ) )
Create Name \$ No Data	Select	Select from I	Reports Phone 🕀		Email	Assigned to: ⇔	K	(0 - 0 of 0)	
Create Name 🔶 No Data	ts Select	Select from I	Reports Phone 🕀		Email	Assigned to: ≑	K (	(0 - 0 of 0)	
Create Name No Data SQL Que Create	ts Select eries / Dy	Select from I	Reports Phone ≑ get List		Email ≑	Assigned to: ⇔	K ¢	(0 - 0 of 0) (1 - 1 of 1)	
Account Create Name ≑ No Data SQL Que Create Name ≑	ts Select eries / Dy Modul ∂	Select from I namic Targ	Reports Phone ≑ get List ⇒ ≑ Dynamic Action ≑	Order Number ⇔	Email ⇔ Job Interval ⇔	Assigned to: $\Rightarrow$ Range $\Rightarrow$	IE C	(0 - 0 of 0) (1 - 1 of 1) ny ⇔	



### 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



### 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