tagMe

SugarCRM Module

SUGARCRM.

Developed to use with SugarCRM.

This project is in no way affiliated with SugarCRM.

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Overview

Fed up of remembering important clients? Tag them!

This plugin allows you to organize your data by giving those tags!!

Tags are keywords or terms that help describe a contact. Using additional information or notes that you have about your contact, tags help you list the little things about your contact that would normally be forgotten.

For example, if you know your contact is a fan of NFC-North Teams, you can add in the "Tags" section of the "Edit Contact" page, 'The NFC-north'. If your organization ever gives away tickets to contacts, you can search for any contact with the tag 'NFC-north' in SugarCRM. tagMe will pull up all contacts that have this tag and you can then get in touch with your contacts and give them those tickets!

Tags are independent of categories defined in SugarCRM. You can use n-number of tags to best organize the contacts sharing similar interests.

Color coded tags make it even simpler to catch them.

P.S. Color codes are randomly generated.

How to install?

Buy plug-in from
https://www.sugaroutfitters.com/addons/tagme/ from
downloads tab.

Install plug-in using Module Loader, Admin > Module Loader.

After successful installation, the custom field type "TagMe"
appears in studio and module builder too.

P.S. This plug-in does NOT support IE 10. It works with
Compatibility mode IE 9.

P.S. Make sure you create just 1 field of this type in a module.

What's new in Version 2?

✓ Mass add or replace tags

✓ Tag Cloud

✓ Search data by tags globally from Dashlet

✓ Search data by tags module wise from Detail View

From v1.1 you can import tags! You can enter multiple tags for a record by comma separator tags.

For example: "John Smith", "these,will,be,my,6,tags" and map the column to correct custom field in the module.

Does your sales rep hate to search for important client's details at last minute?

Do they complain that they have to read description to determine what note says?

tagMe at rescue!!

To narrate the functionality of this plug-in, we have created a field of type "TagMe".
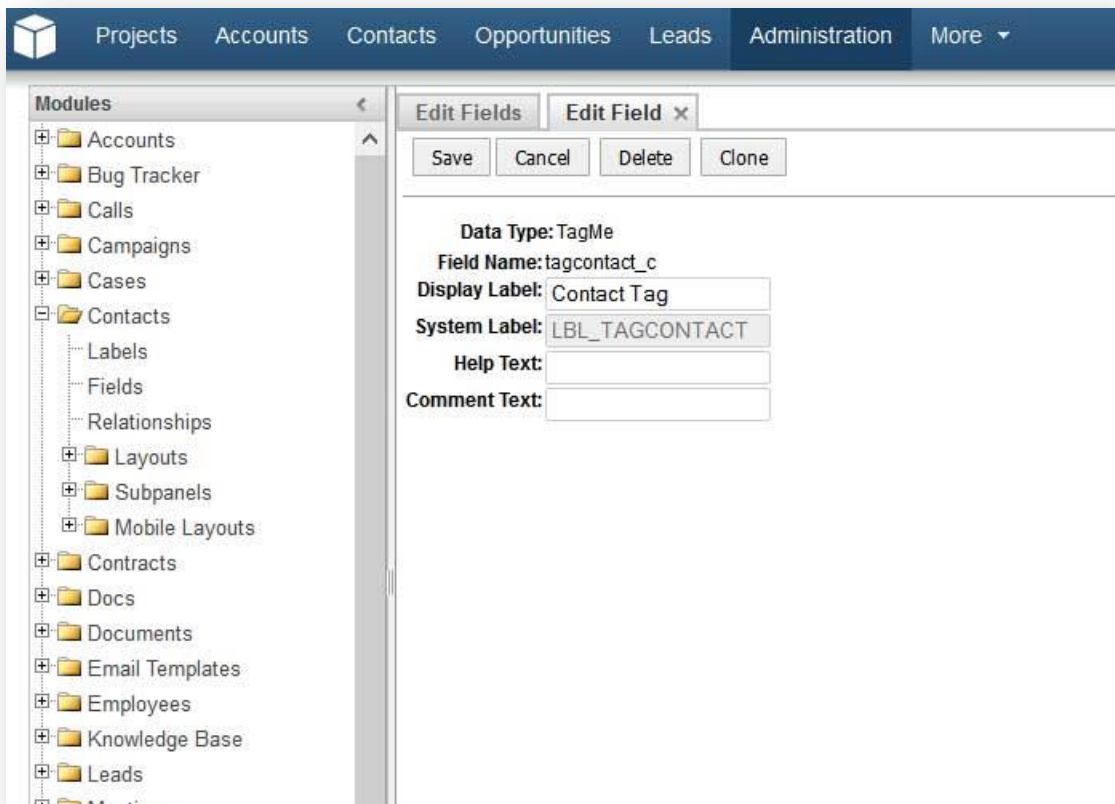
Add newly created field into edit, detail and list views. And why not, in subpanel too!

Edit View & Detail View

List View & Subpanel View

Click on tag in Detail View of any module, e.g. Contacts, and you will have the list of Contacts having that tag (assuming that the Tag field is available in Advance search), or use Advance Search.
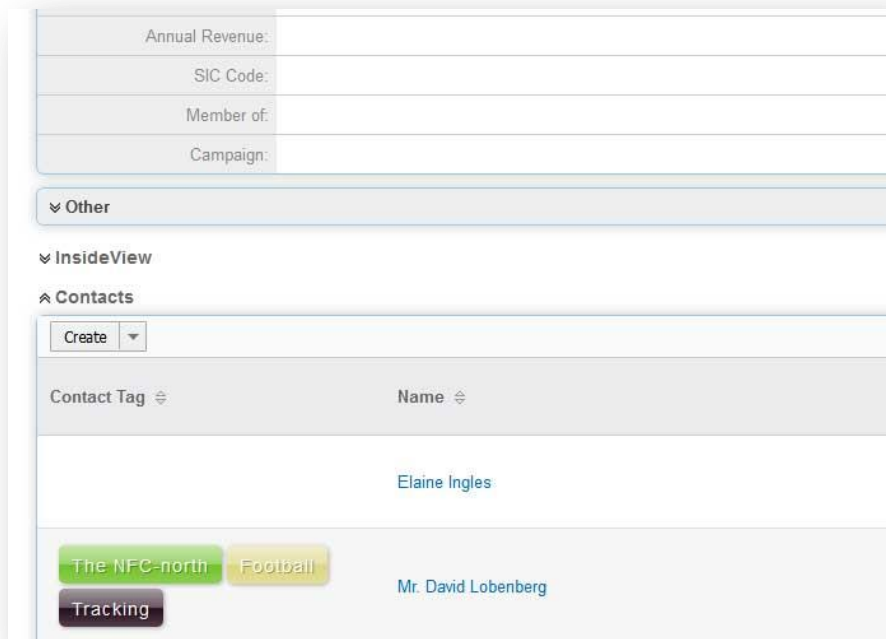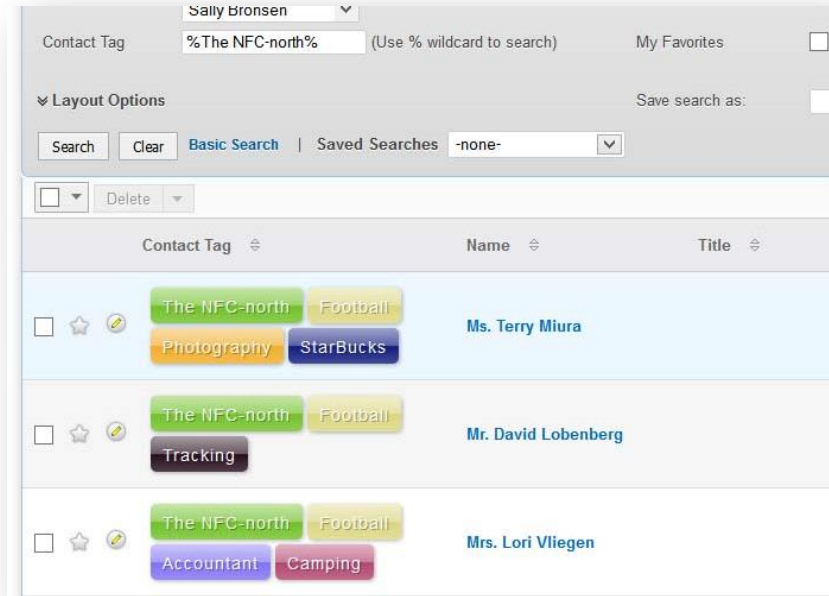
tagMe cloud

From v2, you have a new dashlet named "tagMe Cloud", which gives insight of tags used system wide. Often the tag is used, bigger the tag size will be in dashlet.

You may drill down the data by tags from dashlet. Click on a tag, and it will show up a page showing all records across the system having that tag.
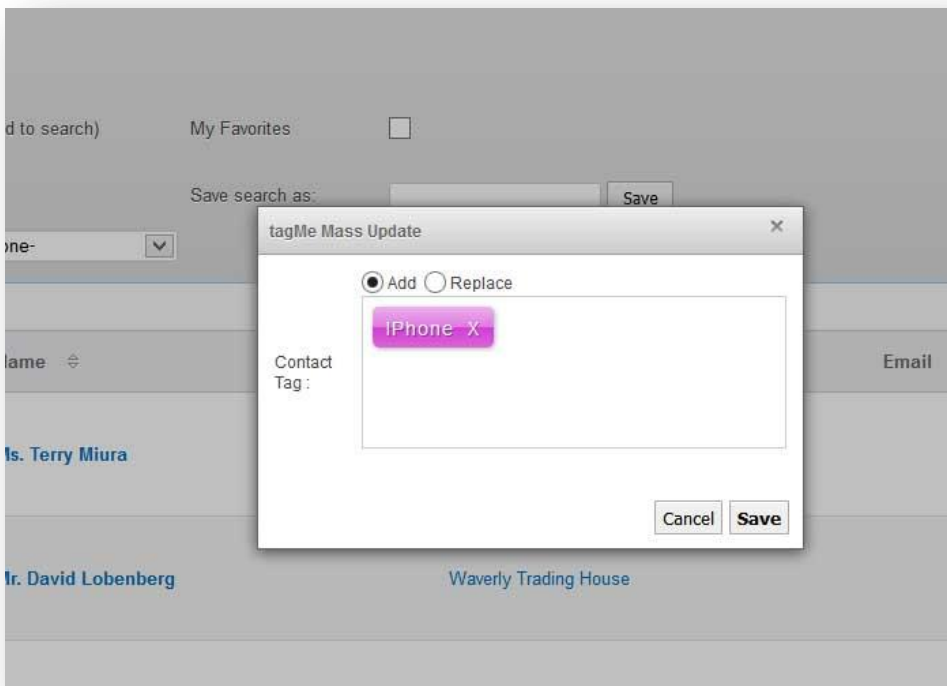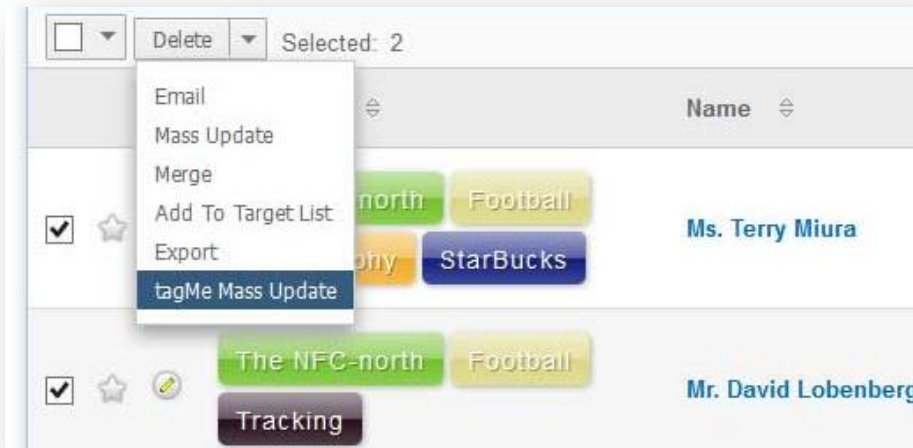
Mass update tags!

You can now add or replace tags using a new action in list view.

If you choose "Add", new tags get added to selected records. If you choose "Replace", it will delete old tags and assign new tags.

Look at that face again!!

Satisfied with the plugin?

☑ Leave reviews in Reviews tab!

Need modifications in plugin?

☑ Contact us at contact@urdhva-tech.com

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