

SugarCRM Auto Increment

**User** Guide

**Auto increment** 

Outright

## **User Guide:-**

## **1.** Create three test records in the Leads Module.

	Product Catalog 👻	Calendar 💌	Calls 👻	Meetings 👻	Tasks 👻	Notes •	Reports 👻	Leads 👻	Contacts *	Accounts +	Opportunities	• Ema	ls 👻 Campaigns	+ Targets	+ Target Lists	• Quotes	• 1		Search	a 💿	2	• +	
Leads	(3)																				Cri	eate	
Filter *	Create 🔕 Search by firs	t name, last nam	e																		0	<b>m</b> 💿	
Select						•																- +	
Enter ne	w filter name			Three	test reco	rds in Le	ads Modul	e without s	erial numb	ers										Reset	Cancel	Save	
	Serial Number	▲ Name			¢	Status			Account	Name	Office Phone	¢ Em	a	¢ User	4	Date Modifie	d	٥	Date Created			٥	
		Lead	1			New								outright SY	STEMS	04/13/2021	01:49pm		04/13/2021 01:46pm			۰ ،	
		Lead	2			New								outright SY	STEMS	04/13/2021	01:49pm		04/13/2021 01:46pm			۰ م	
		Lead	3			New								outright 51	STEMS	04/13/2021	01:49pm		04/13/2021 01:46pm			۰ ۱	

2. Now create new auto increment settings for Leads module.

Generate AutoIncrement ( Serial No) Module	by Outright Store	Create new Auto Increment settings for Leads module	
Generate AutoIncrement ( Serial No) Module by Outrig	ht Store		
Create New Outright Auto increment Settings	Create New Outright Auto increment Settings	See All Outright Auto Increment Settings	See All Outright Auto increment Settings
Outright Auto Increment Search Module	Outright Auto increment Search Module		

**3.** Select Leads in module list option. Enter prefix and suffix as per your requirement and save this setting.

寒 👻 Product Catalog 👻	Calendar 🕶 Calls 🕶 Meetings 👻 Tasks	▼ Notes ▼ Reports ▼ Leads ▼ Contacts ▼ Accounts ▼	Opportunities - Emails -	Campaigns 🕶 Targets 👻	Outright Auto Increment Fields	I Search	۹ 🛛	2-	+
Create		Fill the required fields and save the settings	1						
Save Cancel							* Indi	cates required	field
Module List: *	Leads ~		Select Module Field: *	Serial Number	~				
Field Prefix:	AB-		Field Suffix:	-XY					
Notify EmailAddress:			Latest Number:	0					
A Padding Length Panel									
Enable Padding:	0								
Padding Length: *	10		Padding character.*	0					
Save Cancel									

4. Refresh the Leads pages and after that you can see serial number.

	Product Catalog 🔻	Calendar 🕶 Calls 👻 Meetin	gs 👻 Tasks 👻	Notes 🔻 Re	eports - Leads -	Contacts +	Accounts 👻	Opportunities +	Emails 👻	Campaigns 👻	Targets *	Target Lists	Quotes 👻		Search	a 이	₽-	+
Leads	(3)																Creat	te e
Filter •	Create 🖸 Search by fi	rst name, last name															0 🖩	0
Select-				•													-	+
Enter ner	v filter name	After refreshing the	page you can s	ee the seria	al numbers with pr	efix & suffi	<									Reset	Cancel	Save
	Serial Number	* Name	•	Status		Account N	lame 4	Office Phone	¢ Email	٥	User	٥	Date Modified	٥	Date Created			٥
	AB-1-XY	Lead 1	1	New							outright SYSTEM	٨S	04/13/2021 01:49	m	04/13/2021 01:46pm		۲	•
	AB-2-XY	Lead 2		New							outright SYSTEM	15	04/13/2021 01:49	m	04/13/2021 01:46pm		۲	*
0 \$	AB-3-XY	Lead 3	1	New							outright SYSTEM	٨S	04/13/2021 01:49	əm	04/13/2021 01:46pm		۲	-

**5.** Create three test records in the Contacts Module.

- 1	Product Catalog 👻	Calenda	ar 👻 Calls 💌	Meetings 👻	Tasks 👻	Notes 🔻 Re	eports 👻	Leads 👻	Contacts 💌	Accounts 👻	Opportunities 👻	Emails 👻	Campaigns 👻	Targets 👻	Target Lists 🔻	Quotes 👻 🖠	Search		a 이	₽-	+	
Conta	cts (3)																			Cre	ate	4
Filter *	Create Search by first nar	me, last r	iame, email addre	ss, account name	, office phone	e														2	•	
•	Serial Number	٥	Name	-	Title		@ Act	count Name	¢	Email Address	¢	Office Phone	۰	User		Date Modified	٠	Date Created		۰	٥	
		[	Contacts 1	т	hree reco	ords in Conta	acts mo	dule with	out serial nu	mbers				outright SY	STEMS	04/13/2021 0	1:51pm	04/13/2021 01:	34pm	1	۰ ۱	
			Contacts 2											outright SY	STEMS	04/13/2021 0	1:51pm	04/13/2021 01:	34pm		۰ ۱	
		1	Contacts 3											outright SY	STEMS	04/13/2021 0	1:51pm	04/13/2021 01:	35pm		۰ ۱	

6. Now create new auto increment settings for Contacts module.

Generate AutoIncrement ( Serial No) Module	by Outright Store		
Generate AutoIncrement ( Serial No) Module by Outright	ht Store	Create new Auto Increment Setting for Contacts module	
S Create New Outright Auto increment Settings	Create New Outright Auto increment Settings	See All Outright Auto increment Settings	See All Outright Auto increment Settings
G Outright Auto increment Search Module	Outright Auto increment Search Module		

**7.** Select Contacts in module list option. Enable the padding option and enter the padding length and character.

📚 🔹 Product Catalog 👻	Calendar 🕶 Calis 💌 Meetings 👻	Fasks ♥ Notes ♥ Reports ♥ Leads ♥ (	Contacts 👻 Accounts 👻 Opportunities 👻 Emails 👻	Campaigns + Targets + C	Outright Auto Increment Fields	I Search	a 🗿 🤶 +
Create							
Save Cancel		Choose approvate module and pade	ding length and character				* Indicates required field
Module List: *	Contacts	~	Select Module Field: "	Serial Number	~		
Field Prefix:			Field Suffix:				
Notify EmailAddress:			Latest Number:	0			
A Padding Length Panel							
Enable Padding. Padding Length: "	10		Padding character: *	0			
Save Cancel							

8. Refresh the Contacts pages and then you can see serial numbers.

Conta	octs (3)	Padded ser	ial number with Leading	Zeros is ge	enerated											Create	
Filter •	Create Search by nrst	name, last name, email address,	account name, office phone												0	m	0
	Serial Number	© Name	↑ Title	٠	Account Name	•	Email Address	٥	Office Phone	\$ User	٥	Date Modified	٥	Date Created	۰	0	
	000000001	Contacts 1								outright SYSTEMS		04/13/2021 01:51pm		04/13/2021 01:34pm		۲	*
	000000002	Contacts 2								outright SYSTEMS		04/13/2021 01:51pm		04/13/2021 01:34pm		۲	*
-		C								a suiska CVCTENIC		04/12/2021 01/51em		04/12/2021 01/25em			2

**9.** Create three test records in the Targets Module.

- 1	Product Catalog 👻 Calendar 👻 Calls		s 🕶 Tasks 🕶 Notes 🕶 Report	s 🕶 Leads 👻 Contae	cts 👻 Accounts 👻 Opportunities 👻 Emai	ils 🕶 Campaigns 🕶	Targets 👻	Target Lists 👻 Quotes 👻 🛛	Search	۹ 💿	₽ -	+
Targe	s (3)										Cre	ate «
Filter 🕶	Create Search by first name, last name		Three Record	s created in Targets	a module without serial number						0	m 💿
•	Serial number	¢ Name	-	Title	¢ Email		Phone		Date Created		\$	•
□ \$		Targets 1							04/13/2021 01:36pm		4	۰ ۱
		Targets 2							04/13/2021 01:36pm		4	* *
		Targets 3							04/13/2021 01:36pm		4	۰ ۴

**10.** Now create new auto increment settings for the Targets module.

Generate AutoIncrement ( Serial No) Module	by Outright Store	Create new Auto Increment Settings for Targets Module	
Generate AutoIncrement (Serial No) Module by Outrig	ght Store		
Create New Outright Auto increment Settings	Create New Outright Auto increment Settings	See All Outright Auto increment Settings	See All Outright Auto increment Settings
Outright Auto increment Search Module	Outright Auto increment Search Module		

**11.** Select Targets in module list option. Enter the desired Latest number. (Your serial numbers will start from this number.)

📚 👻 Product Catalog 👻	Calendar 🕶 Calls 💌 Meetings 💌	Tasks 🕶 Notes	▼ Reports ▼	Leads 👻 Contacts		Opportunities • Emails •	Campaigns 👻 Targets	♥ Outright Auto Incre	ment Fields	Search	۹ 💽	2	• +
Create		Choose the	latest number	from which you y	want to start se	rial number							
Seve Cancel											* Indi	icates requin	red field
Module List: *	Targets	<b>v</b> ]			[	Select Module Field: "	Serial number	~					
Field Prefix:						Field Suffix:							
Notify EmailAddress:					Γ	Latest Number:	9999						
Enable Padding:													
Padding Length: *	5					Padding character: *	#						
Save Cancel													

**12.** Refresh the Targets module pages and you can see serial number.

<b>\$</b> -	Product Catalog	▼ Calendar ▼ Calls ▼	• Meetings • Task	s 🕶 Notes 🕶 Report	s 🕶 Leads 🕶	Contacts * Accounts *	Opportunities *	Emails + Can	mpaigns 👻	Targets 💌	Target Lists 💌	Quotes * I	Search	۹ 💿	2 -	+
Targe	:s (3)	Serial nu	mber automatical	y generated from lat	est number	]									Cre	ate 🤞
Filter *	Create Search by firs	t name, last name													0	• •
	Serial number	٥	Name	*	Title		e Email			Phone		1	Date Created		۰	0
	10000		Targets 1										04/13/2021 01:36pm			۰ م
	10001		Targets 2										04/13/2021 01:36pm			
	10002		Targets 3										04/13/2021 01:36pm			• •

**13.** Go to the admin panel and select the see all Auto Increment settings options.

Generate AutoIncrement ( Serial No) Modul	e by Outright Store	See all existing settings here				
Generate AutoIncrement ( Serial No) Module by Outr	ight Store	-				
Create New Outright Auto increment Settings	Create New Outright Auto increment Settings	See All Outright Auto increment Settings	See All Outright Auto increment Settings			
Outright Auto increment Search Module	Outright Auto increment Search Module					

**14.** Here you can see module wise Auto Increment Settings.

📚 * Product Catalog * Calendar * Calls * Meetings * Tasks * Notes * Reports * Lea	ads 🕶 Contacts 👻 Account	s 🕶 Opportunities 💌 Email	ls 👻 Campaigns 👻 Target	es 👻 Outright Auto Increment Fie	lds I Search	a 🗿 🤶 +
Search OUTR AUTOINCREMENT FIELDS						
Name My Items Search Clear Advanced Search						٢
Delete -		Module-wise Auto Ir	ncrement Settings			📧 🕜 (1 - 3 of 3) 🌀 📆
Name o	Module List 👙	Select Module Field 😄	Field Prefix 👙	Field Suffix e	Date Created 🖕	Latest Number 👙
🗋 🎡 🙆 Auto-Generated	Targets	serial_number_t			04/13/2021 08:22am	10,002
🗆 🎡 🥝 Auto-Generated	Contacts	serial_number_c			04/13/2021 08:20am	3
🗋 🎡 🥝 Auto-Generated	Leads	serial_number_l	AB-	-XY	04/13/2021 08:18am	3
Delete +						(IEC () - 3 of 3) () ))