

Employee Referral Handling

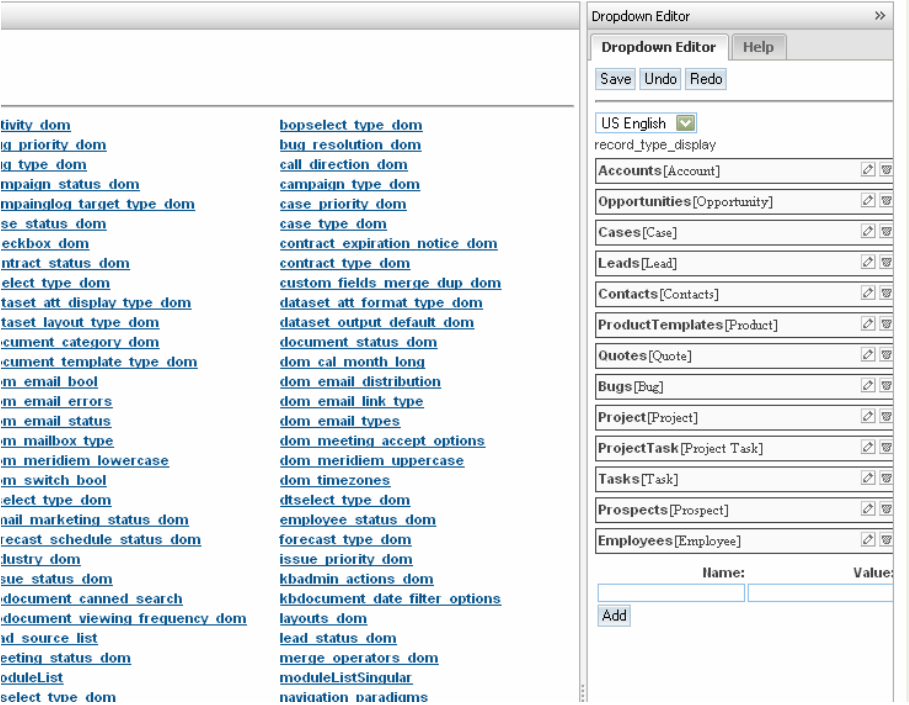
Goal	<i>Extend a list of available modules accessible as a relate-to type field to allow specification of an employee referral.</i>
Scenario	Sanders Corporation compensates its employees for employee referrals. In this lab you will relate the existing Employees module from a new field in Candidates to allow specification of an employee referral.
Outcome	A new relate-to field is created to establish the new relationship: Candidates <- Employees (a Sanders employee may refer one or more candidates)
Time	15 minutes

Instructions

Task 1: *Expose Employees as a module that can be used in a Relate-to relationship to a field.*

The standard Sugar product does not currently expose the **Employees** module when you specify a field with a Data Type of "Relate". This task adds the **Employees** module to the list of modules accessible through a relate-to field

Step	Action
1	Log in as admin then click the Admin link on the upper right. Username: admin Password: sugar

2	Scroll down to the Developer Tools section and click the Dropdown Editor .
3	<p>Click record_type_display among the list of dropdowns displayed and specify the following values:</p> <p>Name: Employees Value: Employee</p>  <p>Click Add, then click Save.</p>

Task 2:

Add a new **Referred By** field to the **Candidates** module, in order to allow a lookup to **Employees** module list

1	Click the Admin link on the upper right. Scroll down to the Developer Tools section and click Studio .
2	In Studio, choose Candidates , then click Fields .

3	<p>Click the Add Field button and add the ref_employee field using the following values:</p> <p>Data Type: Relate Field Name: ref_employee Label Value: Referred by Module: Employees</p> <p>Click Save.</p>
4	<p>Expand the Candidates folder in the left-hand pane, then click Layouts.</p>
5	<p>Click EditView and drag the newly created Referred By field into the Current Layout section.</p>
6	<p>Click the Save and Deploy button.</p>
7	<p>Go back to Layouts and choose DetailView, then repeat steps 5 and 6.</p>