SugarAide

Administration Guide

Date Created: 07.06.2016

Version 1.0

Content

1. Installation

For installing the application, execute the following steps:

1) Make sure that your environment conforms with the [prerequisites](#)
2) [Install package into Sugar](#)
3) [Configure ACLs for installed modules (optional)](#)
4) [Configure Sugar scheduler jobs](#)
5) [Install the application on mobile device](#)

1.1. Prerequisites

SugarAide version 1.0 requires:

- Sugar Professional, Enterprise, Ultimate 7.6.x.x

- Sugar Application Server must have access to the Internet.

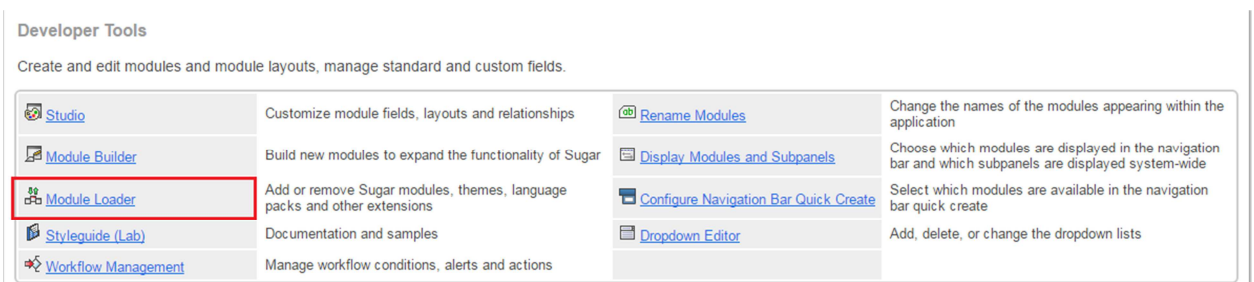- Android version 4.2 and up.

1.2. Installing z20160607_sugaraide_free_1.0.zip package into Sugar

Important: It is recommended to make backups of the site and the database before installing the package.

1. Log in to Sugar using Administrator account.

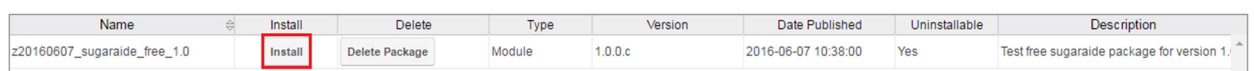2. Navigate to **Admin** tab.
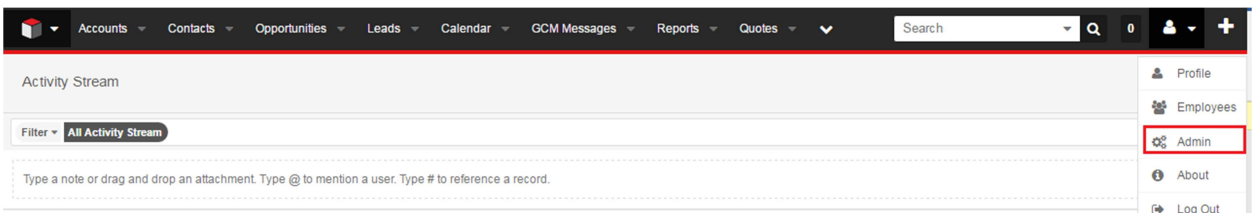
3. Navigate to **Developer Tools -> Module Loader**.

4. Click '**Choose file**' and choose the file z20160607_sugaraide_free_1.0.zip. Click '**Upload**'.

5. After the package is uploaded, click '**Install**'.

6. Read the License Agreement and select 'Accept' option. Click 'Commit' to run the installation.
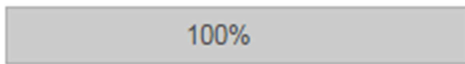
Ready To Install

| License | Readme |

Please read the following License Agreement:

This product is licensed by Integros pursuant to the terms of the End User License Agreement available at http://integroscrm.com/wp-content/uploads/2014/12/Terms-and-Conditions.pdf

⦿ Accept ○ Deny

[Commit] [Cancel]

7. Wait until the package is successfully installed.

100%

Display Log
Module Installed Successfully

[Back to Module Loader]

The following extensions are installed on this system:

Name	Action	Enable/Disable	Type	Version	Date Installed	Description
z20160607_sugaraide_free_1.0	Uninstall	Disable	module	1.0.0.c	07/06/2016 15.41	Test free sugaraide package for version 1.0.0.c

8. Navigate to **Administration (Admin) -> Repair,** run **Quick Repair and Rebuild**.

System

Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings within their user settings page.

System Settings	Configure system-wide settings	Import Wizard	Use the import wizard to easily import records into the system
Locale	Set default localization settings for your system	Upgrade Wizard	Upload and install Sugar upgrades
Currencies	Set up currencies and conversion rates	Backups	Backup Sugar files
Languages	Manage which languages are available for users	Repair	Check and repair Sugar
Search	Select modules for the Global Search and configure full-text searching.	Diagnostic Tool	Capture system configuration for diagnostics and analysis
Connectors	Manage connector settings	Tracker	Enable/Disable tracking
Scheduler	Set up scheduled events	PDF Manager	Manage templates for generated PDF files
Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application	Web Logic Hooks	Manage Sugar Web Logic Hooks
OAuth Keys	OAuth key management		

Repair

Quick Repair and Rebuild	Repairs and rebuilds DB, Extensions, Vardefs, Sugar Dashlets etc.
Upgrade Teams	Creates teams for users
Expand Column Width	Expands certain char, varchar and text columns in database (MSSQL ONLY)
Rebuild web.config File	Rebuilds web.config to limit access to certain files directly
Rebuild Config File	Rebuilds config.php by updating version and adding defaults when not explicitly declared
Rebuild Sugar Logic Functions	Rebuilds Sugar Logic functions cache

1.3. Modules ACLs configuration

CRM system's administrator has to configure the ACLs for new modules based on the organizational structure of the company. Below are our recommendations on assigning the users' access rights:

- 'GCM Messages' and 'GSM User News' modules should not be accessed by regular users (as they are service modules containing technical data).
- 'GCM Registrations' module should be accessed by admin users only.
- 'GCM Subscriptions' module is intended to be used by regular users so it is recommended to give access to this module for regular users.

1.4. Sugar Schedulers configuration

Two schedulers are provided with z20160607_sugaraide_free_1.0.zip package. You may reconfigure them in **Admin** -> **Scheduler** section.

Important! Scheduler jobs are active by default.

1. The first Scheduler job, which will execute sending of Contacts and communication history to mobile devices.

   - Job Name: Sending GCM Messages

   - Job: Sending GCM Messages

   - Interval: Every 5 minutes

   - *Note: it is recommended to run the job as often as possible*

   - Status: Active

Sending GCM Messages ☆

Edit ▾   ⓒ (2 of 19) ⊙

Job Name:	Sending GCM Messages	Status:	Active
Date & Time Start:	08/06/2016 11.10	Active From:	Always
Date & Time End:		Active To:	Always
Last Successful Run:	Never	Interval:	Every 5 minutes
Execute If Missed:	✔	Job:	function::SendUserNews
Date Created:	08/06/2016 14.47 by Administrator	Date Modified:	08/06/2016 14.47 by Administrator

2. The second Scheduler job deletes the sending queue records.

   - Job Name: Deleting History GSM Messages

   - Job: Deleting History GSM Messages

   - Interval: every night at 3 o'clock

   - Status: Active

Deleting History GCM Messages ☆

Edit ▾   ⓒ (1 of 19) ⊙

Job Name:	Deleting History GCM Messages	Status:	Active
Date & Time Start:	08/06/2016 11.10	Active From:	Always
Date & Time End:		Active To:	Always
Last Successful Run:	Never	Interval:	3
Execute If Missed:	✔	Job:	function::CleanUpGCMMessages
Date Created:	08/06/2016 14.47 by Administrator	Date Modified:	08/06/2016 14.47 by Administrator

1.5. Install the application on mobile device

Firstly, you need to download and install the application on your mobile device.

Note: In order to install SugarAide client application onto your Android device, please make sure that the checkbox, labeled "Unknown sources" ("Allow installation of non-Market apps"), is checked in "Security" section of your device's settings.

To perform the installation:

1. Navigate to the provided URL via any browser on your device and download the file.
2. When the download is completed, tap on the entry for the downloaded APK in "Downloads" section or tap the corresponding entry in the push notification area. At this point a dialog, titled "Complete action using" may be displayed. If such a dialog is displayed, select "Package installer" among the listed options.
3. Follow the on-screen instructions in Package installer to complete the installation process.

2. Administration

2.1. Users deactivation

Sugar admins are able to prevent certain users from using SugarAide features. This can be accomplished from the 'GCM Registrations' module.
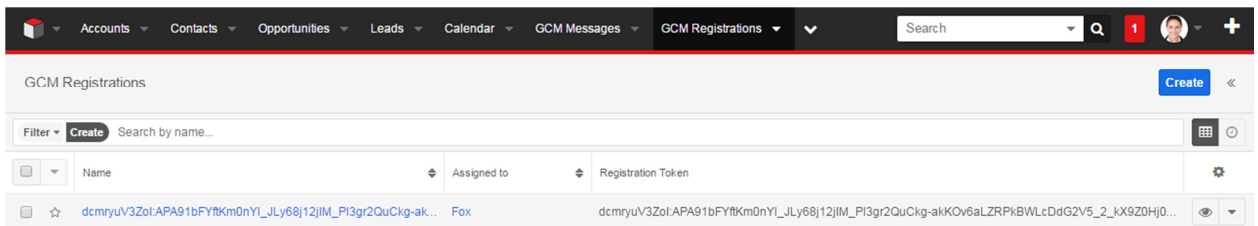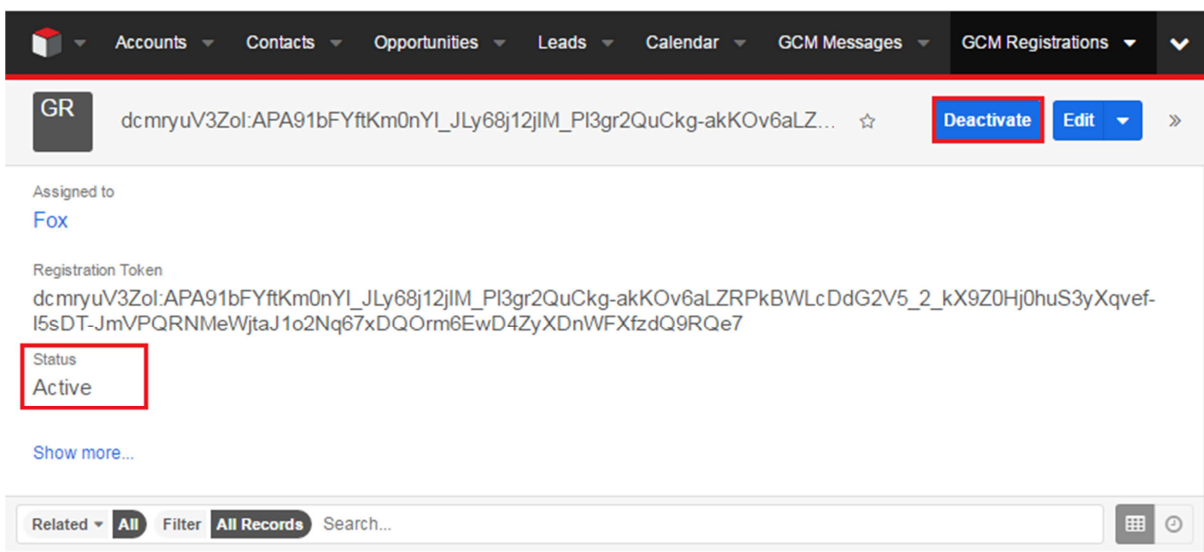

In order to deactivate the mobile application user:

- Change the values of Status field from Active to Inactive

or

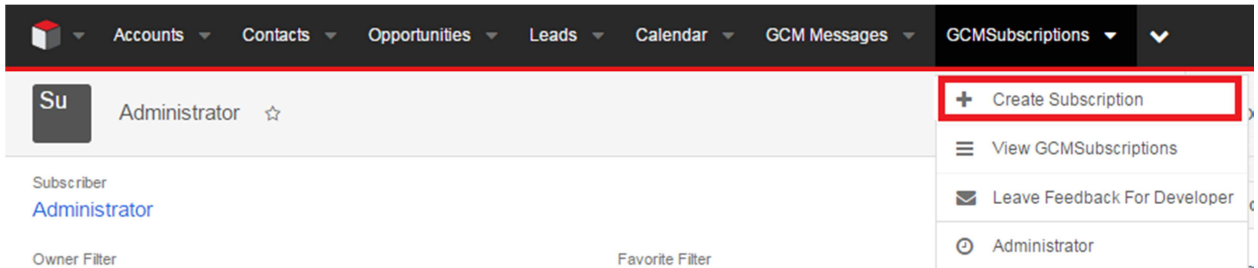- click 'Deactivate' button

2.2. Creating a new Subscription in Sugar

Contacts are pushed to the device according to filters, specified in GCM Subscriptions module.

In order to create a new subscription, execute the following steps:

1. In Sugar, navigate to 'GCM Subscriptions' module and click the 'Create Subscription' menu item:

2. Provide values for the following fields:

- Subscriber – defaults to the current user but may be changed
- Owner Filter – specifies whether Contacts, assigned to the subscriber, should be pushed to the subscriber's device
- Follow Filter - specifies whether Contacts, followed by the subscriber, should be pushed to the subscriber's device
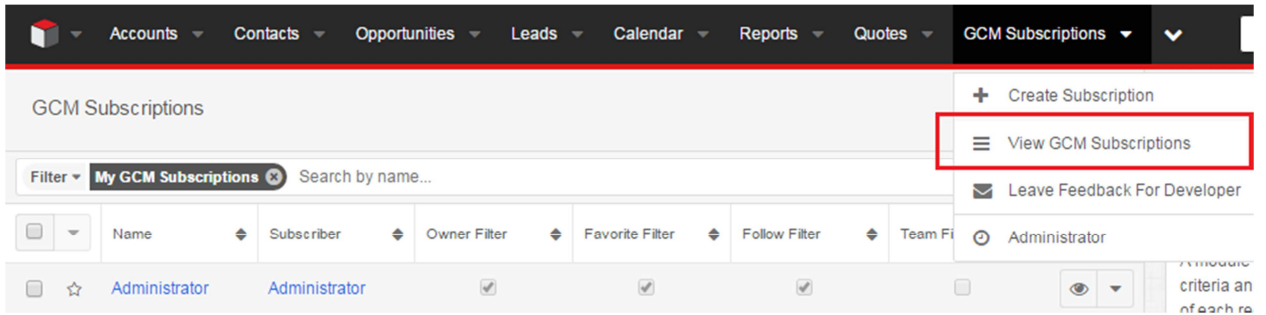- Favorite Filter - specifies whether subscriber's favorite Contacts should be pushed to the subscriber's device
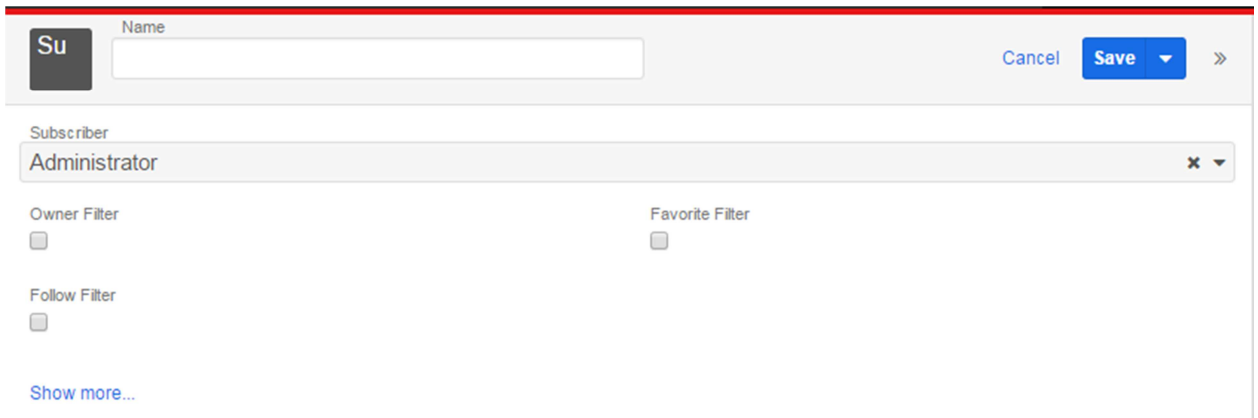
3. Click 'Save'.

Note that a default Subscription will be automatically created for the user when they log into SugarAide for the first time from a new device. In this case, you may choose to change subscription settings.
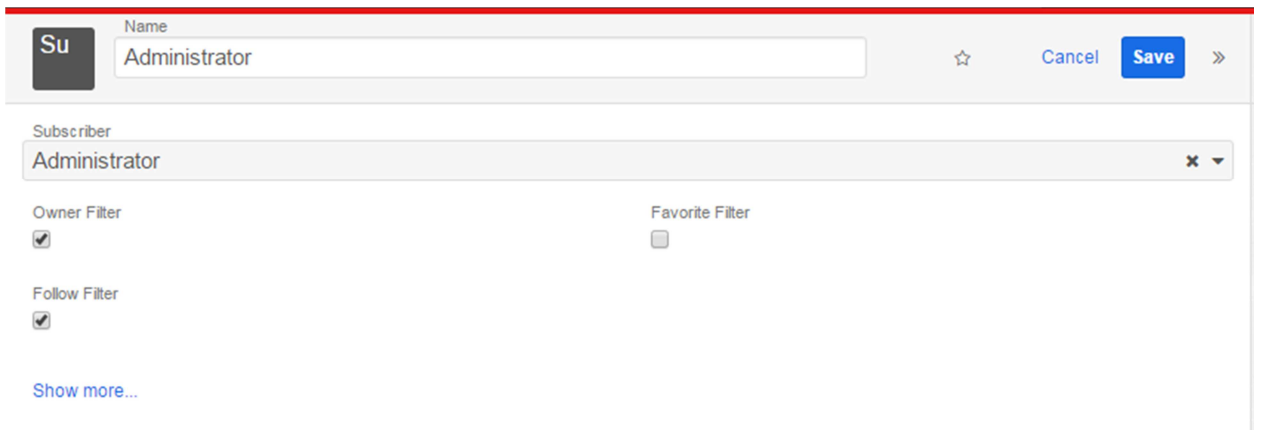
2.3. Editing an existing Subscription

In order to modify an existing subscription, execute the following steps:

1. Navigate to module 'GSM Subscriptions' and click on 'View Subscriptions':

2. By default, only the subscriptions of the current user are displayed. If you wish to view other users' subscriptions, disable 'My GCM Subscriptions' filter.

3. Open the user's subscription record and make changes to one or several fields:

   - Subscriber – defaults to the current user but may be changed
   - Owner Filter – specifies whether Contacts, assigned to the subscriber, should be pushed to the subscriber's device
   - Follow Filter - specifies whether Contacts, followed by the subscriber, should be pushed to the subscriber's device
   - Favorite Filter - specifies whether subscriber's favorite Contacts should be pushed to the subscriber's device

4. Click 'Save'.