

SugarAide

Administration Guide

Date Created: 07.06.2016

Version 1.0

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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.

📬 🕶 Accounts 🔹 Contacts 🔹 Opportunities 🔹 Leads 🐃 Calendar 🐃 GCM Messages 📽 Reports 📽 Quotes 🐃 💌 Search 💌 Q 0	2	- +
Activity Stream	2	Profile
	쓥	Employees
Filter V All Activity Stream	¢\$	Admin
Type a note or drag and drop an attachment. Type @ to mention a user. Type # to reference a record.	0	About
	•	Log Out

3. Navigate to **Developer Tools -> Module Loader**.

Developer Tools								
Create and edit modules and modu	Create and edit modules and module layouts, manage standard and custom fields.							
Studio	Customize module fields, layouts and relationships	(db) Rename Modules	Change the names of the modules appearing within the application					
Module Builder	Build new modules to expand the functionality of Sugar	Display Modules and Subpanels	Choose which modules are displayed in the navigation bar and which subpanels are displayed system-wide					
A Module Loader	Add or remove Sugar modules, themes, language packs and other extensions	Configure Navigation Bar Quick Create	Select which modules are available in the navigation bar quick create					
Styleguide (Lab)	Documentation and samples	Dropdown Editor	Add, delete, or change the dropdown lists					
Norkflow Management	Manage workflow conditions, alerts and actions							

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

4							P.
Module Choose File No file chose	en	Upload					
Name 🔤 Install	Delete	Туре	Version	Date Published	Uninstallable	Description	₫
Module Choose File z20160607	ee_1.0.zip	Upload					
Name 🔤 Install	Delete	Туре	Version	Date Published	Uninstallable	Description	¢

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

Name	4	Install	Delete	Туре	Version	Date Published	Uninstallable	Description
z20160607_sugaraide_free_1.0		Install	Delete Package	Module	1.0.0.c	2016-06-07 10:38:00	Yes	Test free sugaraide package for version 1.

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

Ready To Install

The following extensions are installed on this system Name

I

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	
	10
Accept Deny	
Commit Cancel	

7. Wait until the package is successfully installed.

Enable/Disable

Action

100%	%	
<u>Display Log</u> Module Installed Succe	cessfully	
Back to Module Loader	ider	

	8. Navigate to Ad	lministra	ation	(Admin)	-> Repair,	run Quick R	Repair and Rebuild.	
L								
I	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	

Version

Date Installed

Туре

System			
Configure the system-wide set	ttings according to the specifications of your organization. Use	ers can override some of the	default locale settings within their user settings page.
C System Settings	Configure system-wide settings	Import Wizard	Use the import wizard to easily import records into the system
SP Locale	Set default localization settings for your system	1 Upgrade Wizard	Upload and install Sugar upgrades
SP <u>Currencies</u>	Set up currencies and conversion rates	Backups	Backup Sugar files
50 Languages	Manage which languages are available for users	🔎 <u>Repair</u>	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	Se 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	C Web Logic Hooks	Manage Sugar Web Logic Hooks
e OAuth Keys	OAuth key management		

Repair

P Quick Repair and Rebuild	Repairs and rebuilds DB, Extensions, Vardefs, Sugar Dashlets etc.
	Creates teams for users
P 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
A Rebuild Config File	Rebuilds config.php by updating version and adding defaults when not expl
A Rebuild Sugar Logic Functions	Rebuilds Sugar Logic functions cache

Description

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:	v	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) (5)
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:	8	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.

👕 - Accounts - Contacts - Opportunities - Leads -	Calendar 👻 G	CM Mess	iges 👻	GCM Registrations	•	~	Search		- Q	1	@ -	+
GCM Registrations										l	Create	«
Filter Create Search by name											■	0
Name \$	Assigned to	\$	Registrati	on Token							4	¢
☐ ☆ dcmryuV3Zol:APA91bFYftKm0nYI_JLy68j12jIM_PI3gr2QuCkg-ak	Fox		dcmryu∨	3Zol:APA91bFYftKm0n	1YI_JLy	68j12jIM_PI3gr	2QuCkg-akKOv6a	aLZRPkBWLcD	dG2V5_2_	kX9Z0Hj	D	•

In order to deactivate the mobile application user:

• Change the values of Status field from Active to Inactive

or

• click 'Deactivate' button

👕 🔻 Accounts 👻 Contacts 👻 Opportunities 👻 Leads 👻 Calendar 👻 GCM Messages 👻 GCM Registratio	ns 🗸 🗸
GR dcmryuV3Zol:APA91bFYftKm0nYI_JLy68j12jIM_Pl3gr2QuCkg-akKOv6aLZ ☆ Deactivate	t 🔻 »
Assigned to Fox Registration Token dcmryuV3Zol:APA91bFYftKm0nYI_JLy68j12jIM_Pl3gr2QuCkg-akKOv6aLZRPkBWLcDdG2V5_2_kX9Z0Hj0huS3y I5sDT-JmVPQRNMeWjtaJ1o2Nq67xDQOrm6EwD4ZyXDnWFXfzdQ9RQe7 Status Active Show more	Xqvef-
Related - All Filter All Records Search	

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:

👕 🔻 Accounts 👻 Contacts 👻 Opportuni	ies 🔻 Leads 👻 Calendar 👻	GCM Messages 👻 GC	CMSubscriptions 👻 👽
Su Administrator		+	Create Subscription
		=	View GCMSubscriptions
Subscriber Administrator			Leave Feedback For Developer
Owner Filter	Favorite Filter	e) Administrator

- 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

Su	c	ancel Save - »
Subscriber Administrator		x *
Owner Filter	Favorite Filter	
Follow Filter		
Show more		

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 <u>to change</u> 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':

👕 – Accounts –	Co	ntacts 👻 Op	portu	nities 🔻 I	Leads	- Calendar	Reports 👻	Quot	ies 🔻	GC	M Subscriptions 🔻	~
GCM Subscriptions									_	+	Create Subscription	
		_								=	View GCM Subscrip	tions
Filter My GCM Subscrip	tions	Search by	name)					_	\sim	Leave Feedback Fo	r Developer
Name	\$	Subscriber	\$	Owner Filter	\$	Favorite Filter	\$ Follow Filter	\$	Team F	0	Administrator	
🔲 🏠 Administrator		Administrator		V		×.	×.				۰ -	criteria an

- 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

Su	Administrator		☆	Cancel	Save	*
Subscriber Adminis						× •
Owner Filte	er	Favorite Filter				
Follow Filte	ər					
Show mo	re					

4. Click 'Save'.