

SugarAide

Administration Guide

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Version 1.1

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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 1.1 requires:

- Sugar Professional, Enterprise, Ultimate 7.6.x.x 7.10.x.x
- Sugar Application Server must have access to the Internet.
- Android version 4.2 and up.

1.2. Installing sugaraide_free_1.1.zip package into Sugar

Important: It is recommended to make backups of site and database before installing 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	ľ	- +			
Activity Stream	*	Profile			
		Employees			
Filter * All Activity Stream	¢ŝ	Admin			
Type a note or drag and drop an attachment. Type @ to mention a user. Type # to reference a record.					
	•	Log Out			

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

Developer Tools									
Create and edit modules and module layouts, manage standard and custom fields.									
Studio	Customize module fields, layouts and relationships	(1) 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						
Workflow Management	Manage workflow conditions, alerts and actions								

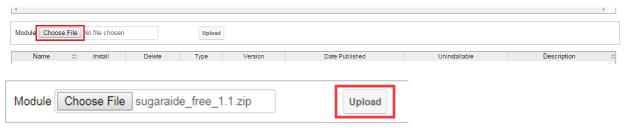
4. If you are **updating from an older** version, first uninstall the old package by clicking "Uninstall":

z20160607_sugaraide_free_1.0	Uninstall	Disable	module	1.0.0.c	

And then select "Do Not Remove Tables" to preserve your existing data in Sugar:

Ready To Uninstall						
Commit	Cancel					
Remove Table OD Not Remove Tables						

5. Click **'Choose file**' and choose the file sugaraide_free_1.1.zip. Click **'Upload**'.



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

Name	\$	Install	Delete	Туре	Version	Date Published	Uninstallable	Description 🕀
SugarAide Plugin v1.1.0		Install	Delete Package	Module	1.1.0	2018-02-01 18:15:45	Yes	Test free SugarAide package for version 1.1.0

7. 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:
	ct is licensed by Integros pursuant to the terms of the End User License Agreement available at roscrm.com/wp-content/uploads/2014/12/Terms-and-Conditions.pdf
intp://intogi	
Accept	Deny
Commit	Cancel

8. Wait until the package is successfully installed.

100%	

Display Log Including: cache/upgrades Performing first quick repa Performing second quick t Removing "Sending GCM Removing "Deleting Histo Creating "Deleting History Rebuilding relationships Performing last quick repa Module Installed Success	air & rebuild repair & reb Messages ry GCM Me Messages" GCM Mes	d build " Sched essages' Schedul sages" (uler " Scheduler ler.			
Back to Module Loader						
SugarAide Plugin v1.1.0	Uninstall	Disable	module	1.1.0	01/02/2018 19:22	Test free SugarAide package for version 1.1.0.c

1.3. Modules ACLs configuration

CRM system's administrator has to configure the ACLs for new modules based on the organizational structure of your 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 sugaraide_free_1.1.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 it 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 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 👻 GCN	M Mess	ages – GCM Registration:	s 🔻	~	Search	- C	x 1	- 👰	+
GCM Registrations									Create	«
Filter Greate Search by name										0
Name \$	Assigned to	\$	Registration Token							o
☐ ☆ dcmryuV3Zol:APA91bFYftKm0nYi_JLy68j12jIM_PI3gr2QuCkg-ak	Fox		dcmryuV3Zol:APA91bFYftKm0)nYI_JL	.y68j12jIM_PI3gr2	QuCkg-akKOv6aLZRF	PkBWLcDdG2V5	_2_kX9Z0	Hj0 👁	•

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 Registrations 👻 🔹	•
GR dcmryuV3Zol:APA91bFYftKm0nYI_JLy68j12jIM_Pl3gr2QuCkg-akKOv6aLZ ☆ Deactivate Edit ▼	Þ
Assigned to Fox Registration Token dcmryuV3ZoI:APA91bFYftKm0nYI_JLy68j12jIM_PI3gr2QuCkg-akKOv6aLZRPkBWLcDdG2V5_2_kX9Z0Hj0huS3yXqvef- ISsDT-JmVPQRNMeWjtaJ1o2Nq67xDQOrm6EwD4ZyXDnWFXfzdQ9RQe7 Status Active Show more	
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 👻 Opportunities 👻 Leads 👻	Calendar 👻 GCM Messages 👻	GCMSubscriptions 👻 🗸			
Su Administrator		+ Create Subscription			
		■ View GCMSubscriptions			
Subscriber Administrator		Leave Feedback For Developer			
Owner Filter	Favorite Filter	 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 <mark>Save -</mark> »
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 -	Contacts 👻 Opp	portunities 👻 Le	eads 👻 Calendar	→ Reports →	Quotes	GCI	M Subscriptions 👻 🗸
GCM Subscriptions						+	Create Subscription
						=	View GCM Subscriptions
Filter My GCM Subscrip	tions 🙁 Search by r	name					Leave Feedback For Developer
Name	Subscriber	Owner Filter	Favorite Filter	Follow Filter	Tear	m Fi 🧿	
🔲 🕁 Administrator	Administrator	s.	Ø	I all a second a se			Criteria an of each re

- 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	Name Administrator		☆	Cancel	Save	*
Subscriber Adminis					:	x -
Owner Filt	er	Favorite Filter				
Follow Filte	ər					
Show mo	re					

4. Click 'Save'.