

# **DTG Sugar Auto Increment Field v0.1 beta - Documentation**

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# About

## Overview

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The DTG Sugar Autoincrement package is a simple SugarCRM extension that enables support for an Autoincrement field. It should be most useful to SugarCE users as SugarCE does not include a field type that supports Autoincrement. I.e. An automatically generated unique code that increments each time a new record is created.

This extension will enable you to create auto increment fields using Module Builder, Studio or in custom developed modules. Once installed you can create as many auto increment fields as you like for and module (standard or custom). Refer to the user guide for more information.

# Installation Guide

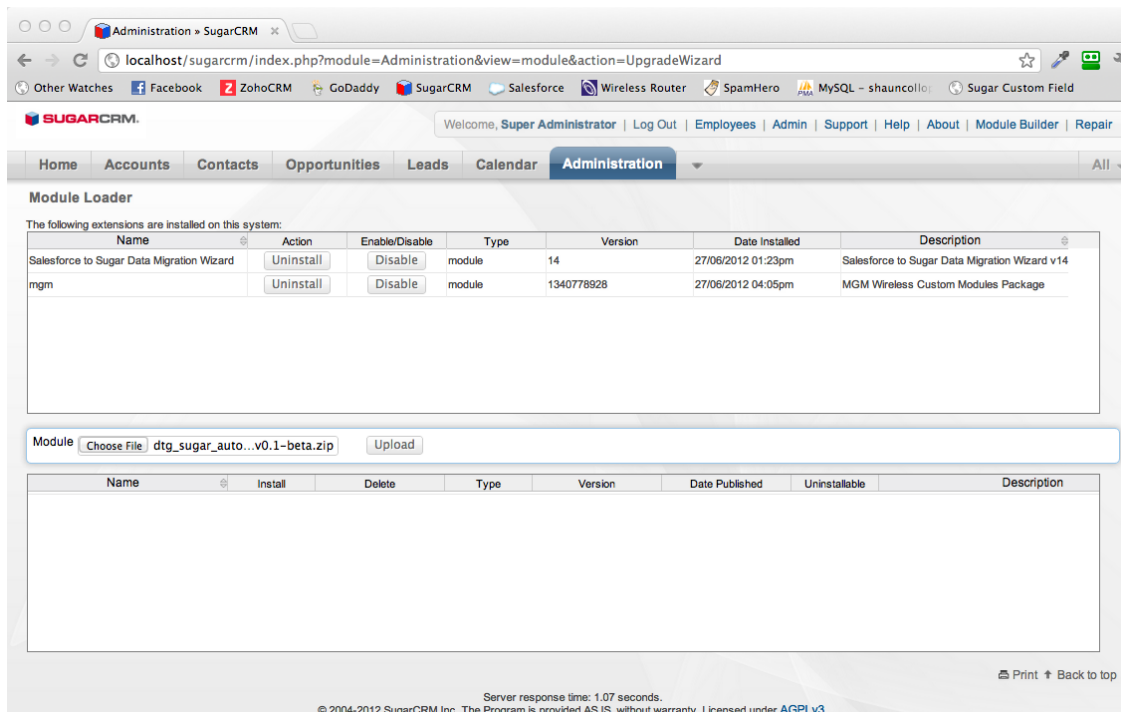
## Installing the Module

To download the latest version visit <http://www.sugarforge.org/projects/autoincrement>

The extension is packaged as a standard SugarCRM module, however because it is an extension/utility you will not see a new tab or module created. The package contains a set of sugar php extension files that are installed in an upgrade safer manner within the 'custom' directory.

To install the module:

### Upload Module



Go to Admin->Module Loader. Then select the Choose File button and located the module zip file you downloaded. Then click the upload button as shown above.

## Install Package

The screenshot shows the SugarCRM Administration interface. The top navigation bar includes links for Home, Accounts, Contacts, Opportunities, Leads, Calendar, and Administration (which is selected). Below the navigation bar, the 'Module Loader' section is active. It displays a table of installed extensions and a section for uploading new modules.

**Module Loader**

The following extensions are installed on this system:

Name	Action	Enable/Disable	Type	Version	Date Installed	Description
Salesforce to Sugar Data Migration Wizard	Uninstall	Disable	module	14	27/06/2012 01:23pm	Salesforce to Sugar Data Migration Wizard v14
mgm	Uninstall	Disable	module	1340778928	27/06/2012 04:05pm	MGM Wireless Custom Modules Package

Below the installed extensions table, there is a section for uploading a new module. It includes a 'Module' label, a 'Choose file' button, a text input field showing 'No file chosen', and an 'Upload' button.

Name	Install	Delete	Type	Version	Date Published	Uninstallable	Description
DTG SugarCRM Autoincrement Field v0.1 beta	Install	Delete Package	Module	0.1 beta	2012-06-27 16:05:46	Yes	DTG Generic Autoincrement Field Imple

At the bottom of the page, there is a footer section containing copyright information and a 'Print' button.

Server response time: 0.73 seconds.  
© 2004-2012 SugarCRM Inc. The Program is provided AS IS, without warranty. Licensed under [AGPLv3](#).  
This program is free software; you can redistribute it and/or modify it under the terms of the [GNU Affero General Public License Version 3](#) as published by the Free Software Foundation, including the additional permission set forth in the source code header.  
SugarCRM is a trademark of SugarCRM, Inc. All other company and product names may be trademarks of the respective companies with which they are associated.

If the upload is successful you will see the module appear in the bottom window list. Now click the Install button to start the installation. You will be prompted to accept the license then the installation will start. Once complete click 'Return To Module Loader'

# Installation Complete

The screenshot shows the SugarCRM Administration interface. The top navigation bar includes tabs for Home, Accounts, Contacts, Opportunities, Leads, Calendar, and Administration. The Administration tab is selected. Below the navigation bar, the 'Module Loader' section is visible. It contains a table of installed extensions and a form to upload new modules.

Name	Action	Enable/Disable	Type	Version	Date Installed	Description
DTG SugarCRM Autoincrement Field v0.1 beta	Uninstall	Disable	module	0.1 beta	27/06/2012 05:32pm	DTG Generic Autoincrement Field Implementation for S
Salesforce to Sugar Data Migration Wizard	Uninstall	Disable	module	14	27/06/2012 01:23pm	Salesforce to Sugar Data Migration Wizard v14
mgm	Uninstall	Disable	module	1340778928	27/06/2012 04:05pm	MGM Wireless Custom Modules Package

Below the table, there is a form to upload new modules. It includes a 'Module' label, a 'Choose file' button, a 'No file chosen' text, and an 'Upload' button.

Name	Install	Delete	Type	Version	Date Published	Uninstallable	Description
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At the bottom of the page, there is a footer section containing copyright information and a 'Print' button.

If the installation was successful you will now see the new module appear in the installed modules list and you are ready to start creating auto increment fields.

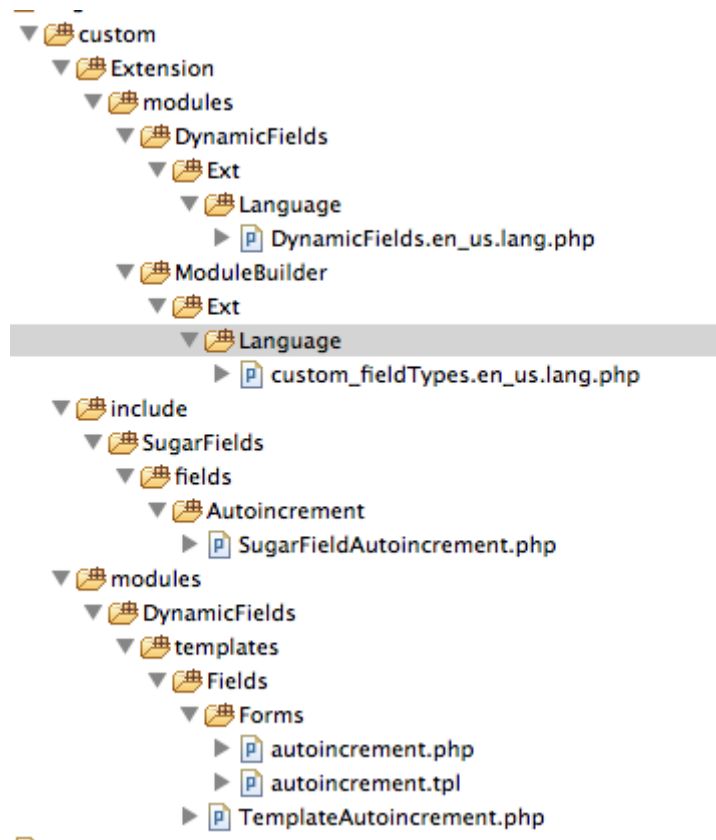


## Installation Files

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The image below shows the extension files and the directories where they are installed for this extension/module. You don't need to know this but it may be helpful if you want to look at the code and/or make changes.

### Module Install Files & Locations



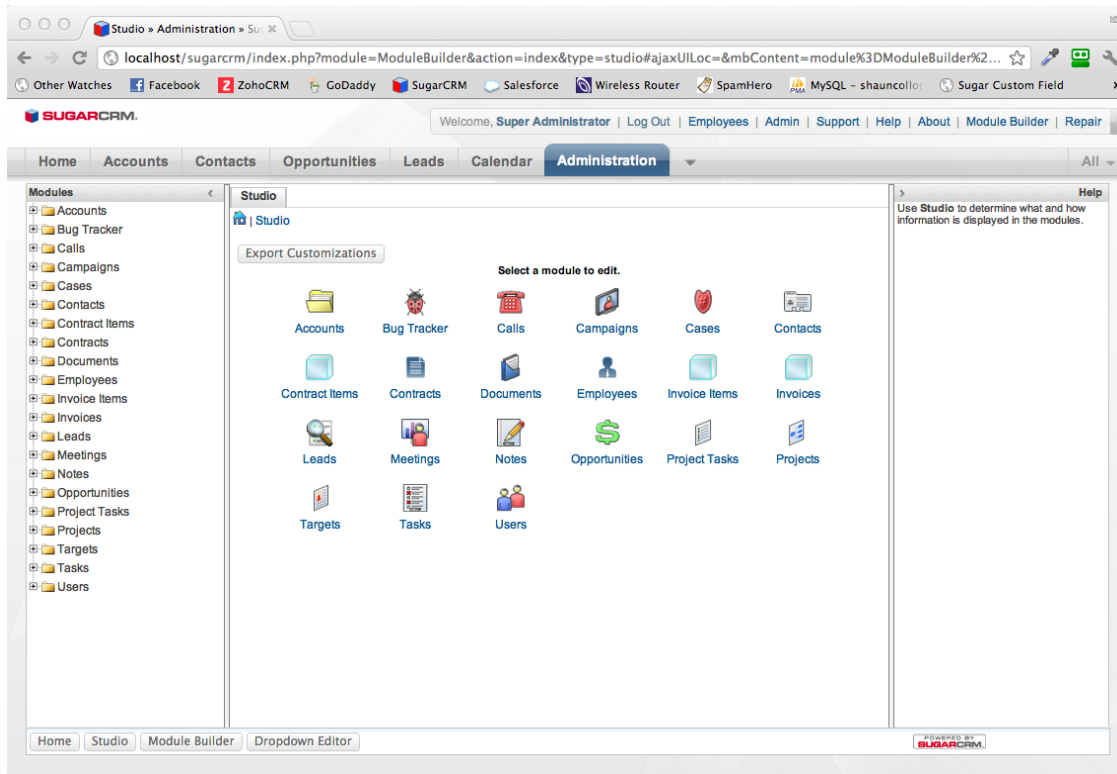
Note that all the files are created within the 'custom' directory. All files are copied to upgrade safe locations that simply extend the relevant sugar module. You should not need to make any changes to any of these unless you intend to make modifications. The main logic is in the TemplateAutoincrement.php and SugarFieldAutoincrement.php classes.

# User Guide

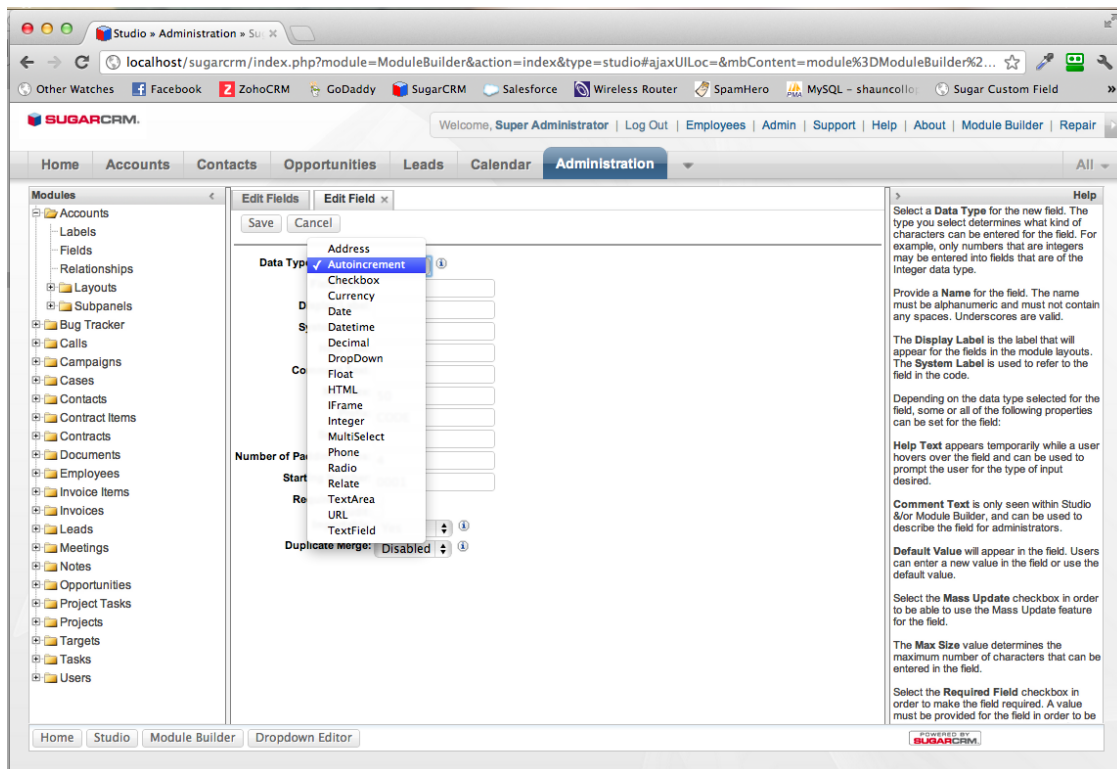
## How to Create an Auto Increment Field

For the purpose of this example let's assume you want to add an auto increment field to a standard Sugar module so you will be using Studio, and you want to add an auto increment field to the Account module. If you want to create an auto increment field for a custom module follow the same steps but use Module Builder instead of Studio.

### Go to Admin->Studio



## Select Account->Fields->Add Field then click the Data Type Drop Down



You will now have a new field data type called Autoincrement. Select the Autoincrement option.

## Set Autoincrement Properties

The screenshot shows a 'Edit Field' dialog box with the following properties:

- Data Type:** Autoincrement
- Field Name:** account\_code
- Display Label:** Account Code
- System Label:** LBL\_ACCOUNT\_CODI
- Help Text:** Unique auto generat
- Comment Text:** Autoincrement code
- Max Size:** 50
- Prefix:** MYCO
- Seperator:** -
- Number of Padding Zeros:** 6
- Starting Number:** 000001
- Required Field:** ☐
- Audit:** ☐
- Importable:** Yes
- Duplicate Merge:** Disabled

Set all the standard field properties such as Field Name, Display Name etc. You will notice there are 4 properties specific to Auto increment fields, as shown above. These values will be set to defaults, which you should update to your preference.

Below is a summary of what each of the properties are used for:

- **Prefix:** The Text or Number you would like displayed at the start of the auto increment value. E.g. MYCO
- **Seperator:** The character used to separate the prefix and the auto number. E.g. -
- **Padding Zeros:** The number of zeros to pad the number with. E.g. 6
- **Start Number:** The Number to start from when you first add records. E.g. 000001
- Using the examples above the auto increment value would start at: MYCO12-000001

### Notes:

- The characters "12" after the prefix represent the current 2 digit year. This is not customizable as Sugar only supports 4 custom DynamicField properties.
- You should not set the value as a required field as the value is set once the form is submitted, before being saved. So if you set as a required field the Edit form will fail

the javascript validation

Now you can add the field to any of the Layouts for the module. Be sure NOT to add the field to the EditView layout as generally you would not want users to be able to type in or change the auto generated field value.

# Support & Feedback

## How to Contact

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This package is provided free of charge without warranty or any promise to provide support. I will happily try and answer support questions and review bug reports. Please submit feedback, bugs and questions to [shaun@disruptive-tech.com](mailto:shaun@disruptive-tech.com)