DTG Sugar Auto Increment Field v0.1 beta - Documentation

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About

Overview

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.
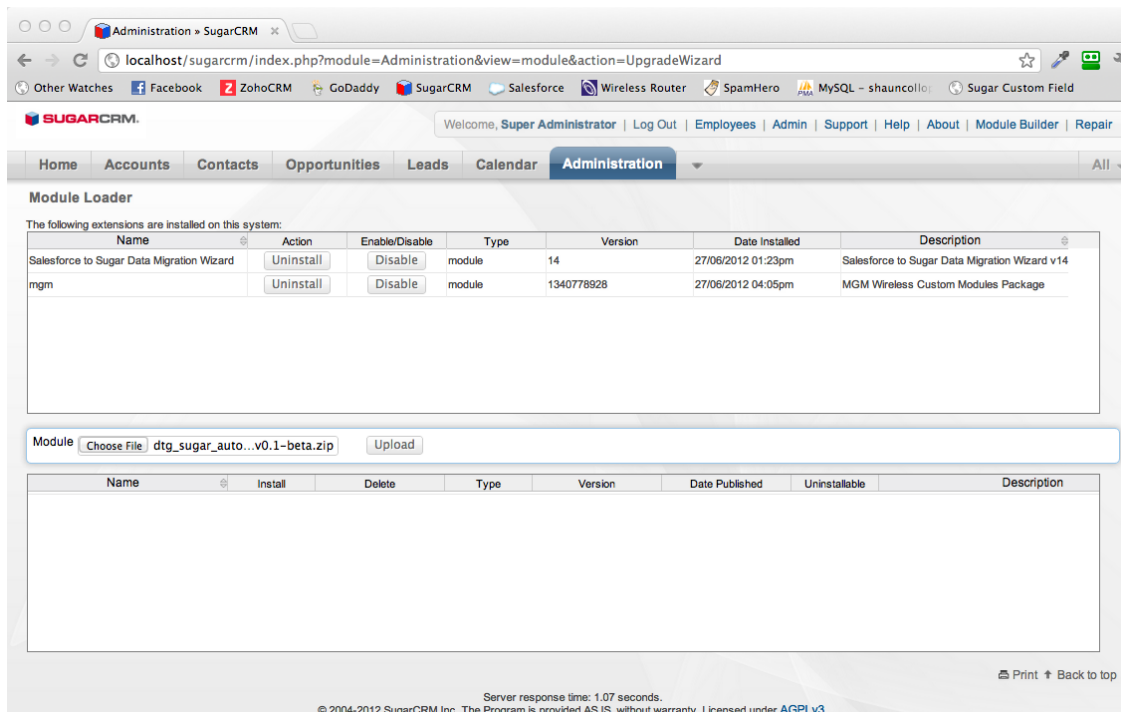
Installation Guide

Installing the Module

To download the latest verion visit http://www.sugarforge.org/projects/autoincrement

The extension is package 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. The click the upload button as shown above.

Install Package

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

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.
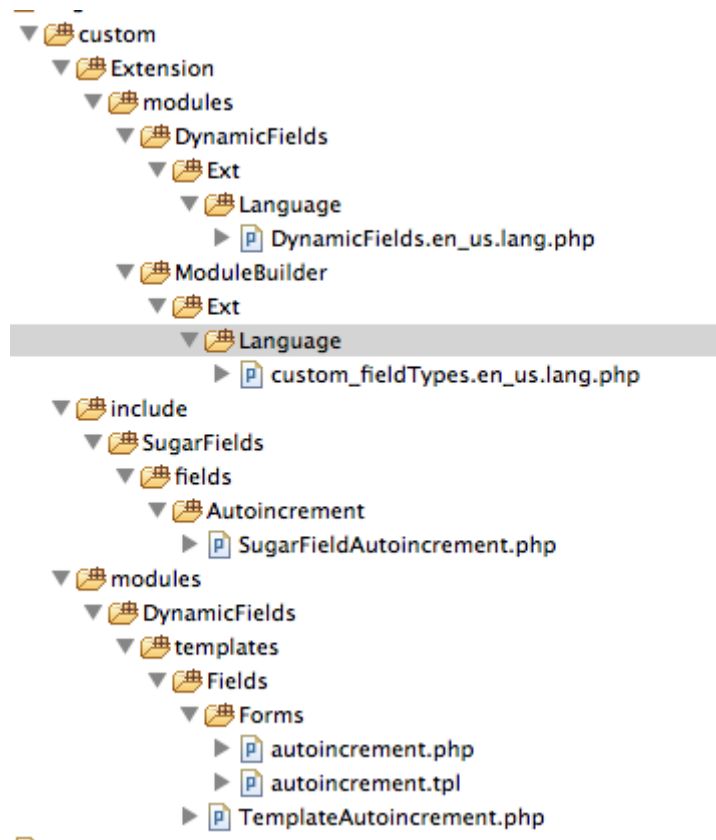
Installation Files

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.

```
▼ 📁 custom
   ▼ 📁 Extension
      ▼ 📁 modules
         ▼ 📁 DynamicFields
            ▼ 📁 Ext
               ▼ 📁 Language
                  ▶ 📄 DynamicFields.en_us.lang.php
         ▼ 📁 ModuleBuilder
            ▼ 📁 Ext
               ▼ 📁 Language
                  ▶ 📄 custom_fieldTypes.en_us.lang.php
   ▼ 📁 include
      ▼ 📁 SugarFields
         ▼ 📁 fields
            ▼ 📁 Autoincrement
               ▶ 📄 SugarFieldAutoincrement.php
   ▼ 📁 modules
      ▼ 📁 DynamicFields
         ▼ 📁 templates
            ▼ 📁 Fields
               ▼ 📁 Forms
                  ▶ 📄 autoincrement.php
                  ▶ 📄 autoincrement.tpl
               ▶ 📄 TemplateAutoincrement.php
```
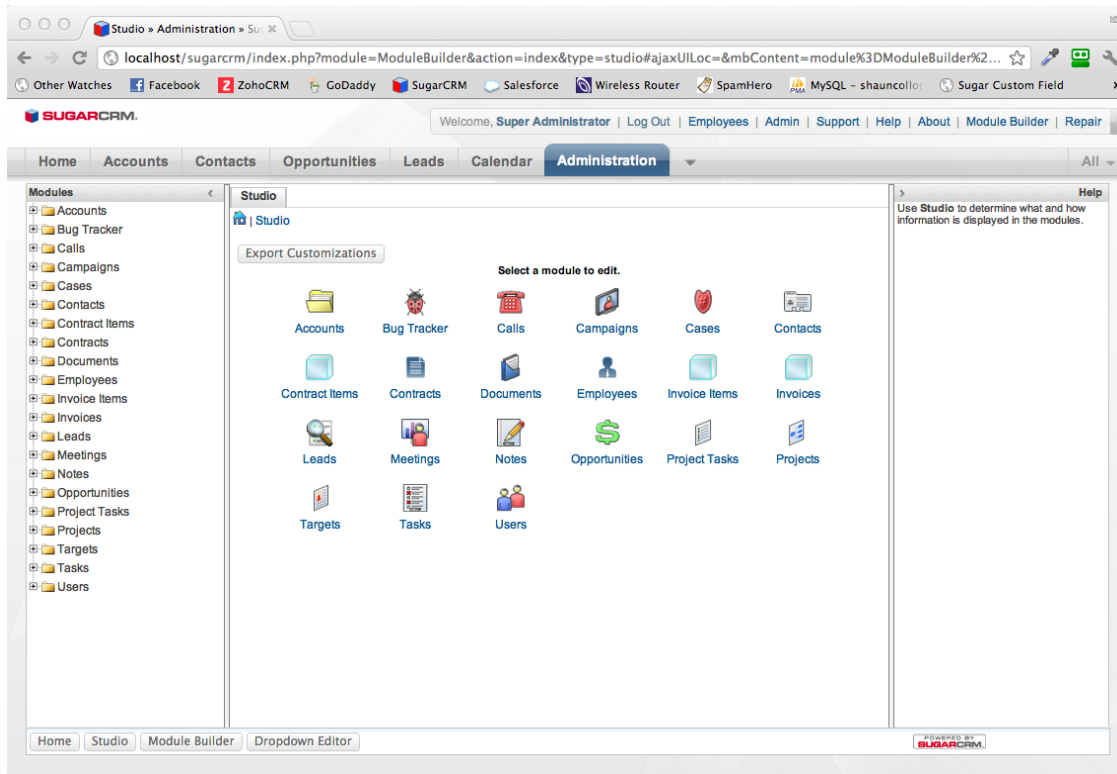
Note that all the files are created within the 'custom' directory. All files are copied to upgrade safe locations that simple extend the relevant sugar module. You should not need to make any changes to any of these unless you intend to make modifications. The main logic is in the TemplateAutoincrement.php and SugarFieldAutoincrement.php classes.

User Guide

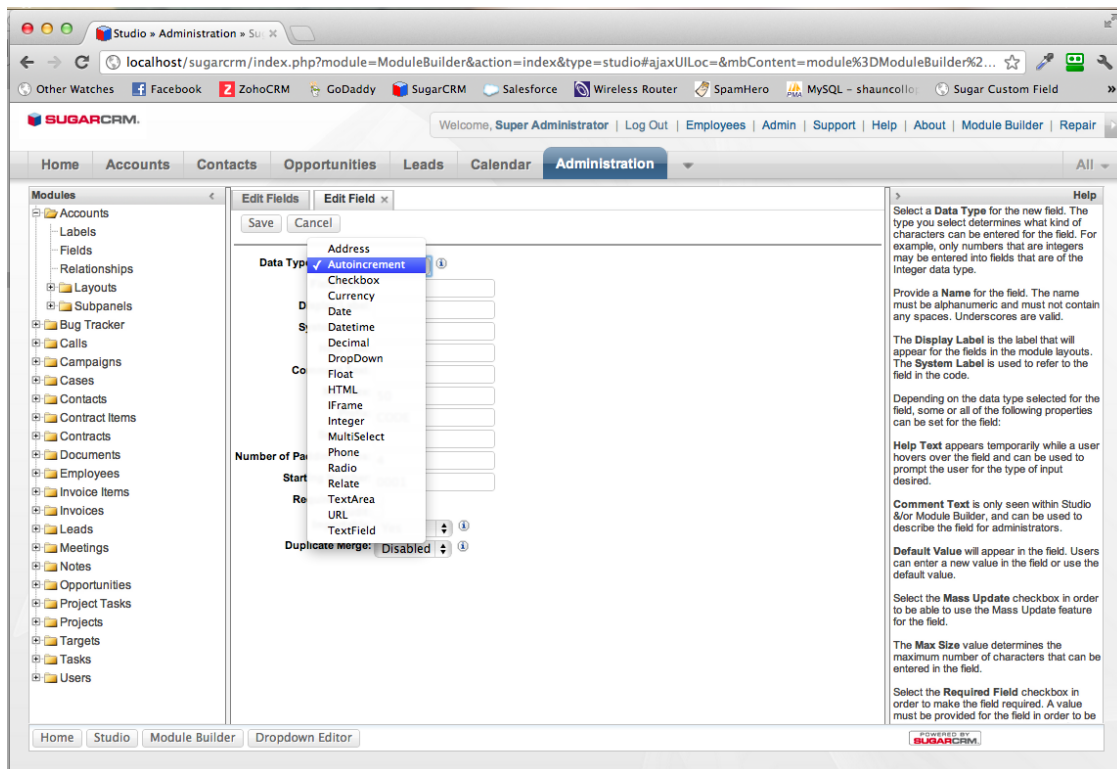# How to Create an Auto Increment Field

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 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

Set all the standard field properties such as Field Name, Display Name etc. You wil 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 prefererence.

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 seperate the prefix and the auto number. E.g. –
- **Padding Zeros:** The number of zeros to padd 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

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