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How to install Document sync to Dropbox?

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Install to SugarCRM/SuiteCRM from module loader

Login by admin from your CRM

Admin > Module Loader > Upload zip file and install it

Configure

When you install successful.

Go to Admin > Connector > Set Connector Properties

1. Choose Dropbox tab:

The screenshot shows a configuration window for a connector. At the top, there are two red buttons: "SAVE" and "CANCEL". Below them is a tabbed interface with four tabs: "Dropbox", "Google", "Facebook", and "Twitter". The "Dropbox" tab is selected. The main content area contains the following text:

Obtain a API Key and Secret from Dropbox by registering your Sugar instance as a new application.

Steps to register your instance:

1. Go to the Dropbox Developers site: <https://www.dropbox.com/developers/apps>.
2. Sign In using the Dropbox account under which you would like to register the application.
3. Create App
4. Choose an API
5. Choose the type of access you need
6. Enter a Project Name and click create.
7. Add Redirect URIs: <http://localhost/ua/SuiteCRM778/index.php?module=EAPM&action=DropboxOAuth2Redirect>
8. Copy the App key and App secret into the boxes below

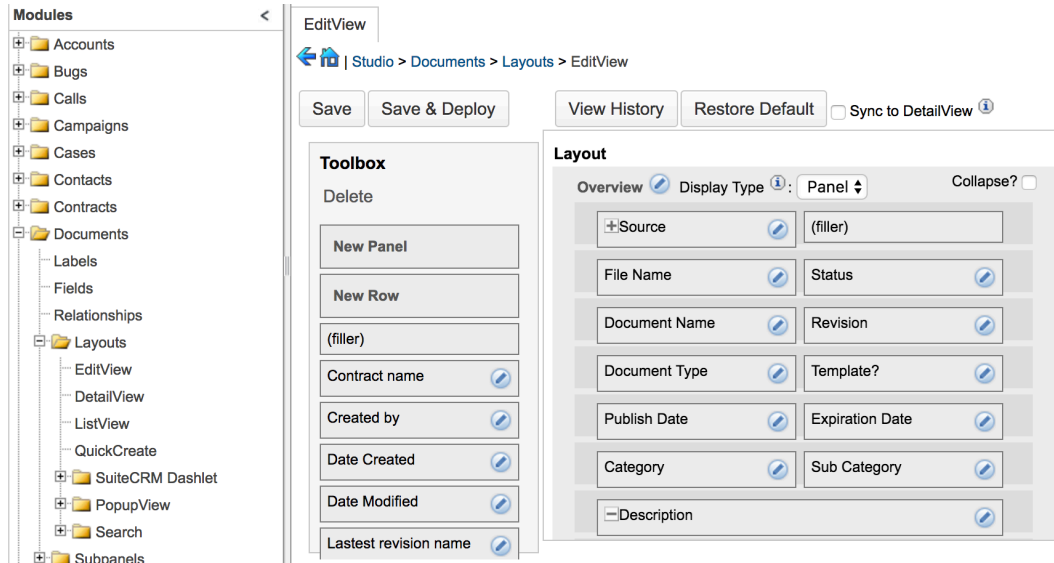
Below the instructions, there are two input fields:

App key: * [Text input field]

App secret: * [Text input field]

At the bottom, there is a checkbox labeled "Only upload to admin Dropbox:" which is currently unchecked.

2. Create Dropbox API application and input at your CRM.
3. Need to add External Account for each user to active sync (instruction below).
4. Go to Admin > Studio > Document > Layout > EditView > set Source to layout > Save and Deploy



Sync document to general Dropbox

To sync documents to general dropbox and share all users in company

Try it:

1. Go to Admin > Connector > Set Connector Properties > Dropbox
2. Check: Only upload to admin dropbox and click Save

Dropbox

Google

Facebook

Twitter

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8. Copy the App key and App secret into the boxes below

App key: *

App secret: *

Only upload to admin Dropbox:

☒

- Admin go to your profile and create External Account with application is Dropbox > click Connect (username/password/url is account and url your crm)

Administrator » Edit

[Create](#)

[Save](#) [Cancel](#) [Reset User Preferences](#) [Reset Homepage](#)

* Indicates required field

User Profile Password Themes Advanced External Accounts

Create			(0 - 0 of 0)	
Application	App User Name	Date Modified		
No Data				

[Save](#) [Cancel](#) [Reset User Preferences](#) [Reset Homepage](#)

* Indicates required field

[Connect](#) [Cancel](#)

Application: *	Google	Status:	
App User Name: *	<input type="text" value="admin"/>	App Password: *	<input type="password" value="....."/>
URL: *	<input type="text"/>		
(Omit http:// or https://)			

End user create document

- Go to Profile > Edit > External Account > Create

Administrator » Edit

[Create](#)

[Save](#) [Cancel](#) [Reset User Preferences](#) [Reset Homepage](#)

* Indicates required field

User Profile Password Themes Advanced External Accounts

Create			(0 - 0 of 0)	
Application	App User Name	Date Modified		
No Data				

[Save](#) [Cancel](#) [Reset User Preferences](#) [Reset Homepage](#)

* Indicates required field

- Add user with username/password/url of CRM account and CRM url > click Connect > Allow permission from Dropbox

[Connect](#) [Cancel](#)

Application: *	Google	Status:	
App User Name: *	<input type="text" value="admin"/>	App Password: *	<input type="password" value="....."/>
URL: *	<input type="text"/>		
(Omit http:// or https://)			

- Go to Documents > Create > Source > choose Dropbox > Save

Create

[Save](#) [Cancel](#)

Overview	
Source: ⓘ	SuiteCRM
File Name: *	Choose File No file chosen
Document Name: *	<input type="text"/>
Document Type:	Choose
Publish Date: *	<input type="text" value="01/06/2017"/>
Category:	Choose
Description:	<input type="text"/>
Status:	Active
Revision: *	<input type="text" value="1"/>
Template?:	<input type="checkbox"/>
Expiration Date:	<input type="text"/>
Sub Category:	Choose

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