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How to install Document sync to Google Drive?

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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 Google tab:

[Connector Settings](#) » Set Connector Properties

The screenshot shows a web form titled 'Set Connector Properties' with tabs for 'Google', 'Facebook', and 'Twitter'. The 'Google' tab is selected. The form contains instructions on how to obtain a Google API key and secret, followed by a list of 11 steps. Below the instructions are two input fields for 'Client ID' and 'Client secret', and a checkbox for 'Only upload to admin google drive:'. The form has 'Save' and 'Cancel' buttons at the top and bottom.

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

Steps to register your instance:

1. Go to the Google Developers site: <https://console.developers.google.com/project>
2. Sign In using the Google account under which you would like to register the application.
3. Create a new project
4. Enter a Project Name and click create.
5. Once the project has been created enable the Google Drive and Google Contacts API
6. Under the APIs & Auth > Credentials section create a new client id
7. Select Web Application and click Configure consent screen
8. Enter in a product name and click Save
9. Under the Authorized redirect URIs section enter the following url: <http://localhost/ua/SuiteCRM75/index.php?module=EAPM&action=GoogleOAuth2Redirect>
10. Click create client id
11. Copy the client id and client secret into the boxes below

Client ID: *

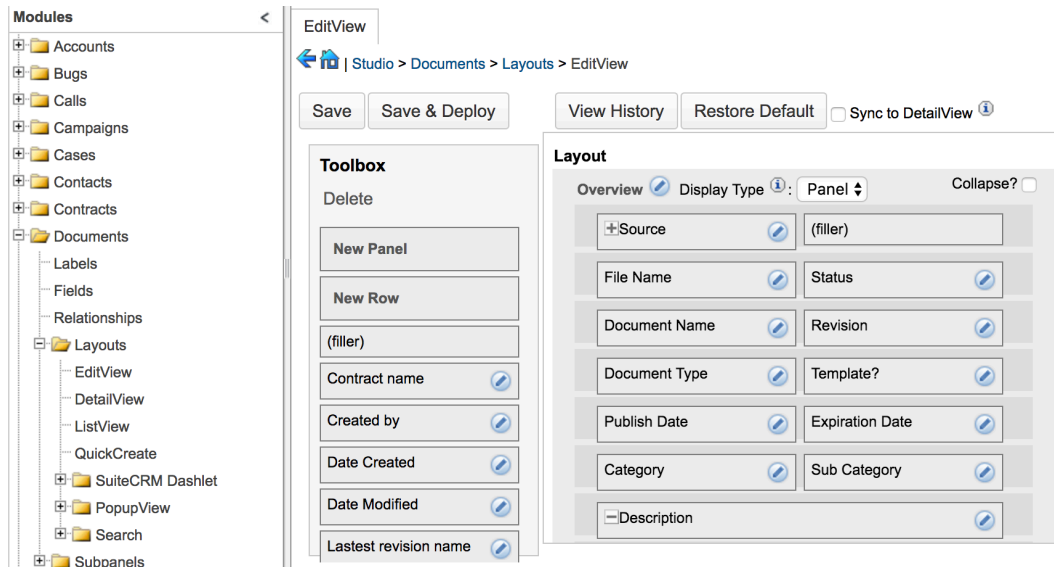
Client secret: *

Only upload to admin google drive: ☐

2. Create Google 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 Google Drive

To sync documents to general google drive and share all users in company

Try it:

1. Go to Admin > Connector > Set Connector Properties > Google
2. Check: Only upload to admin google drive and click Save

[Connector Settings](#) » Set Connector Properties

The screenshot shows the 'Set Connector Properties' form for Google. It has tabs for 'Google', 'Facebook', and 'Twitter'. The 'Google' tab is active. The form contains instructions on how to obtain a Google API Key and Secret, followed by a list of 11 steps to register the instance. Below the instructions are input fields for 'Client ID' and 'Client secret', both marked with a red asterisk. There is a checkbox labeled 'Only upload to admin google drive:' which is checked. At the bottom are 'Save' and 'Cancel' buttons.

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

[Administrator](#) » Edit

[Create](#)

The screenshot shows the Administrator profile page. At the top are buttons: 'Save', 'Cancel', 'Reset User Preferences', and 'Reset Homepage'. Below these are tabs: 'User Profile', 'Password', 'Themes', 'Advanced', and 'External Accounts'. The 'External Accounts' tab is active. It shows a table with columns 'Application', 'App User Name', and 'Date Modified'. The table is empty, with 'No Data' displayed. At the bottom are buttons: 'Save', 'Cancel', 'Reset User Preferences', and 'Reset Homepage'. A red asterisk indicates required fields.

Connect Cancel

Application: * Google ▾

App User Name: * admin

URL: * (Omit http:// or https://)

Status:

App Password: *

End user create document

1. 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

Application	App User Name	Date Modified
No Data		

Save Cancel Reset User Preferences Reset Homepage * Indicates required field

2. Add user with username/password/url of CRM account and CRM url > click Connect > Allow permission from Google

Connect Cancel

Application: * Google ▾

App User Name: * admin

URL: * (Omit http:// or https://)

Status:

App Password: *

3. Go to Documents > Create > Source > choose Google Drive > Save

Create

Save Cancel

Overview

Source: SuiteCRM ▾

File Name: * Choose File No file chosen

Document Name: *

Document Type: ▾

Publish Date: * 01/06/2017

Category: ▾

Description:

Status: Active ▾

Revision: * 1

Template?: ☐

Expiration Date:

Sub Category: ▾

More questions about Word?

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