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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

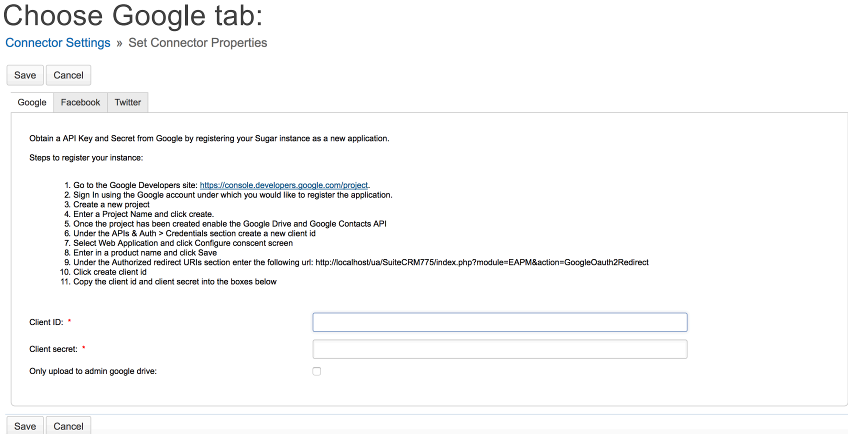
Admin > Module Loader > Upload zip file and install it

Configure

When you install successful.

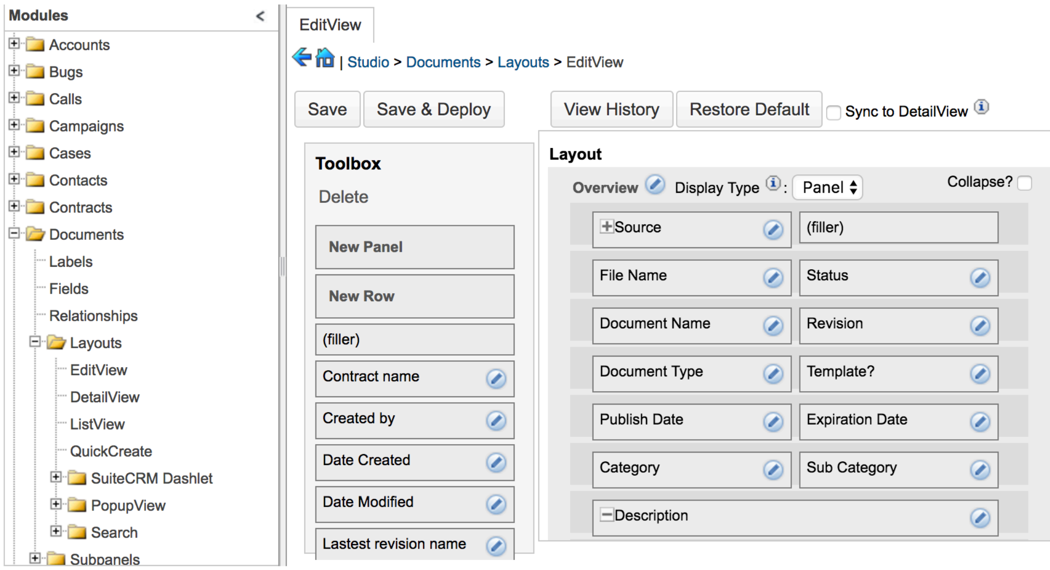
Go to Admin > Connector > Set Connector Properties

1. Choose Google tab:



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

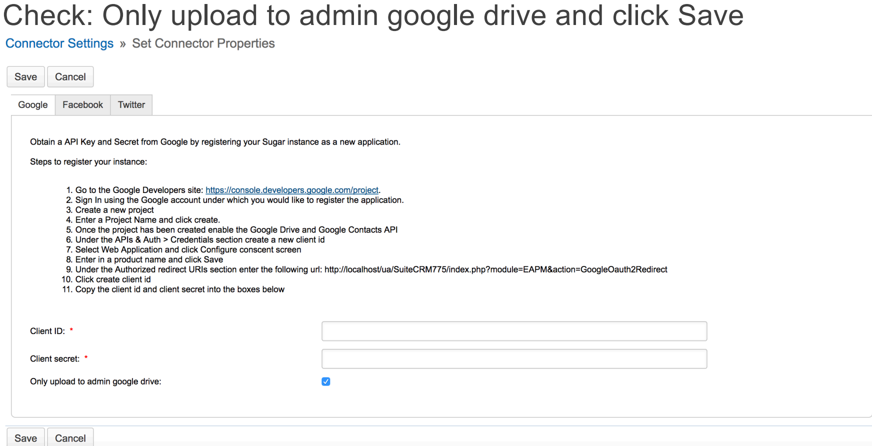


Sync document to general Google Drive

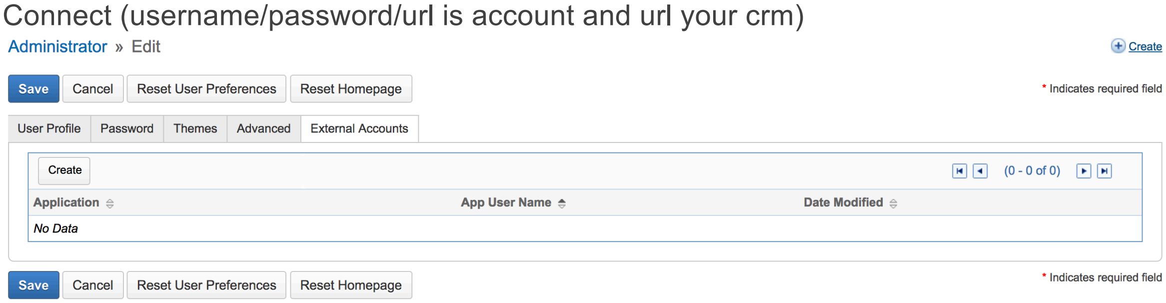
To sync documents to general google drive and share all users in company

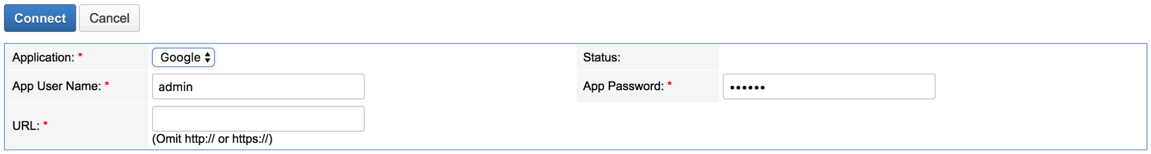
Try it:

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



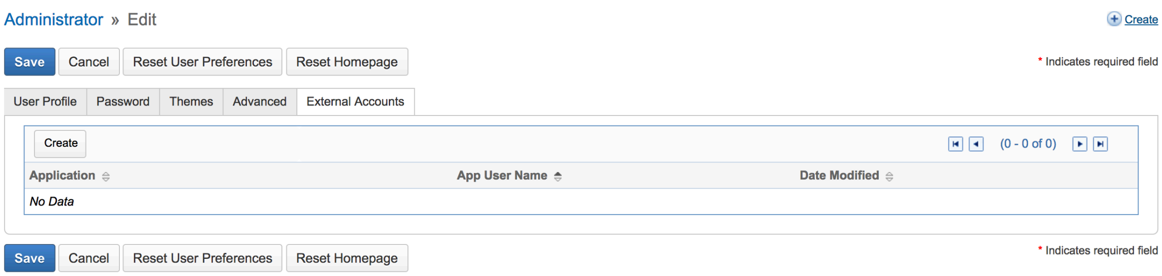
3. Admin go to your profile and create External Account with application is Google > click Connect (username/password/url is account and url your crm)



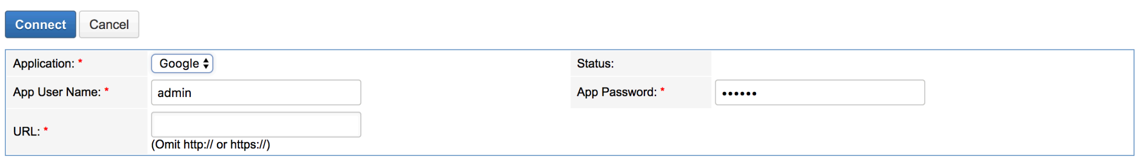


End user create document

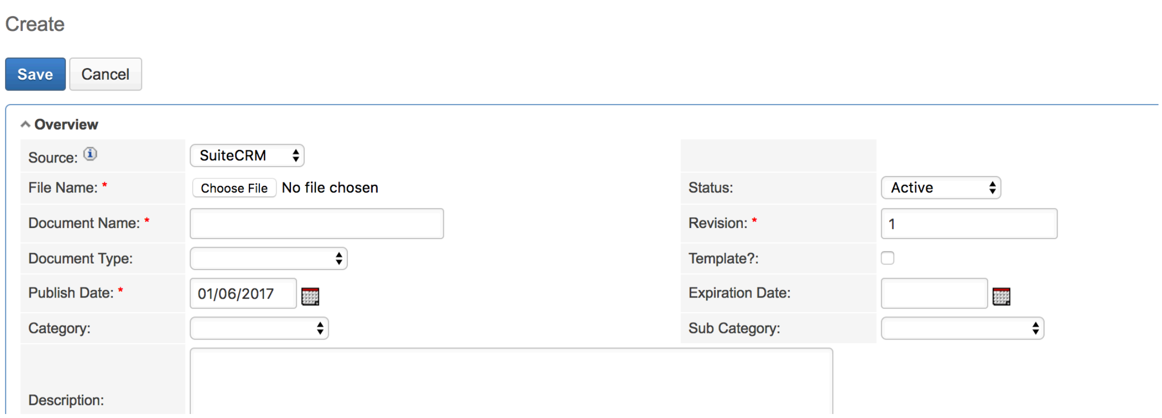
1. Go to Profile > Edit > External Account > Create



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



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



More questions about Word?

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