

Tryton - Sugar CRM Integration module

version 2.6.1.0

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Welcome to Tryton SugarCRM's documentation!

Installing trytond-sugarcrm module

The steps below describe the process of installing the module on a tryton instance.

Installation from source code

Installing dependency

1. The module depends on a python module which can be downloaded from [here](#).
2. The module can be downloaded as a zip or can be cloned by running

```
git clone https://github.com/sugarcrm/python_webservices_library.git
```

3. If the module is downloaded as a zip, extract the module which will give a directory.
4. From the module directory, use the setup.py script with the command:

```
python setup.py install
```

Installing tryton dependency module

1. This module depends on another non standard tryton module [party_communication](#).
2. The module can be downloaded as a zip or can be cloned by running

```
hg clone https://bitbucket.org/zikzakmedia/trytond-party_communication
```

3. If the module is downloaded as a zip, extract the module which will give a directory.
4. From the module directory, use the setup.py script with the command:

```
python setup.py install
```

Installing tryton module

1. The module source is available online and can be downloaded from [here](#).
2. The module can be downloaded as a zip or can be cloned by running

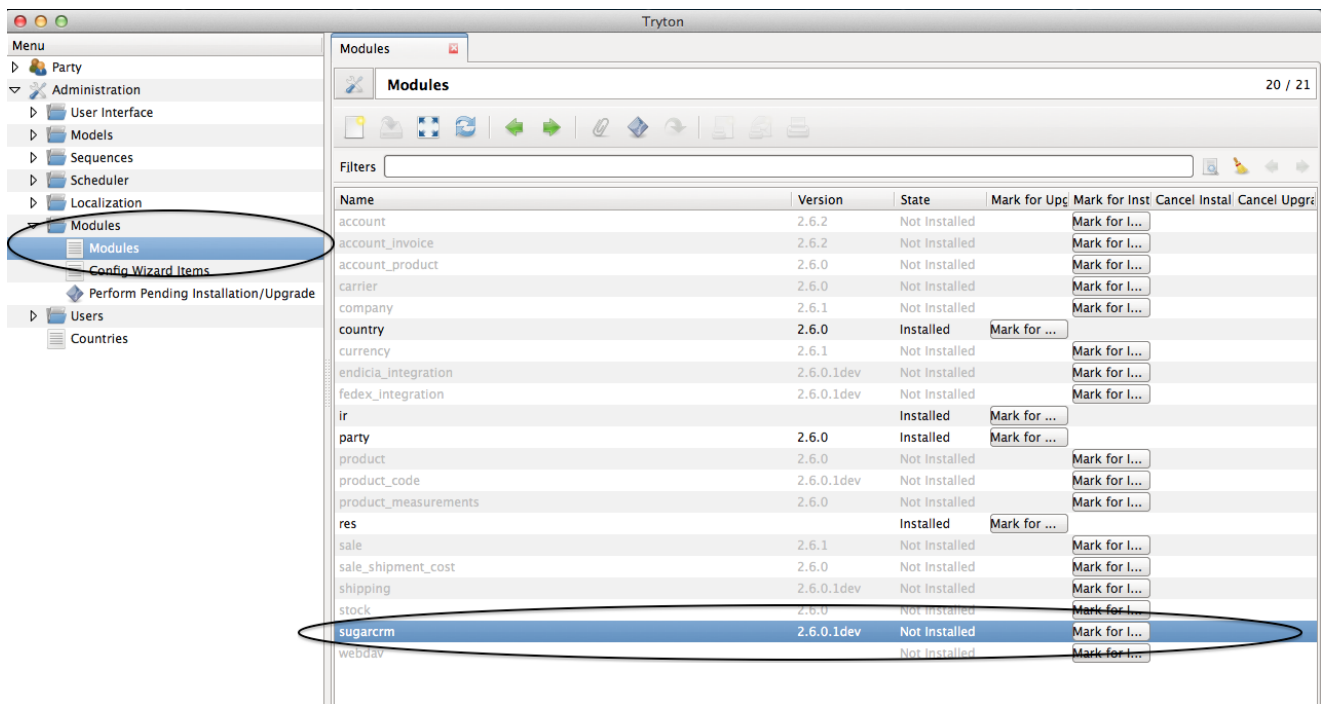
```
git clone https://github.com/openlabs/trytond-sugarcrm.git
```

3. If the module is downloaded as a zip, extract the module which will give a directory.
4. From the module directory, use the setup.py script with the command:

```
python setup.py install
```

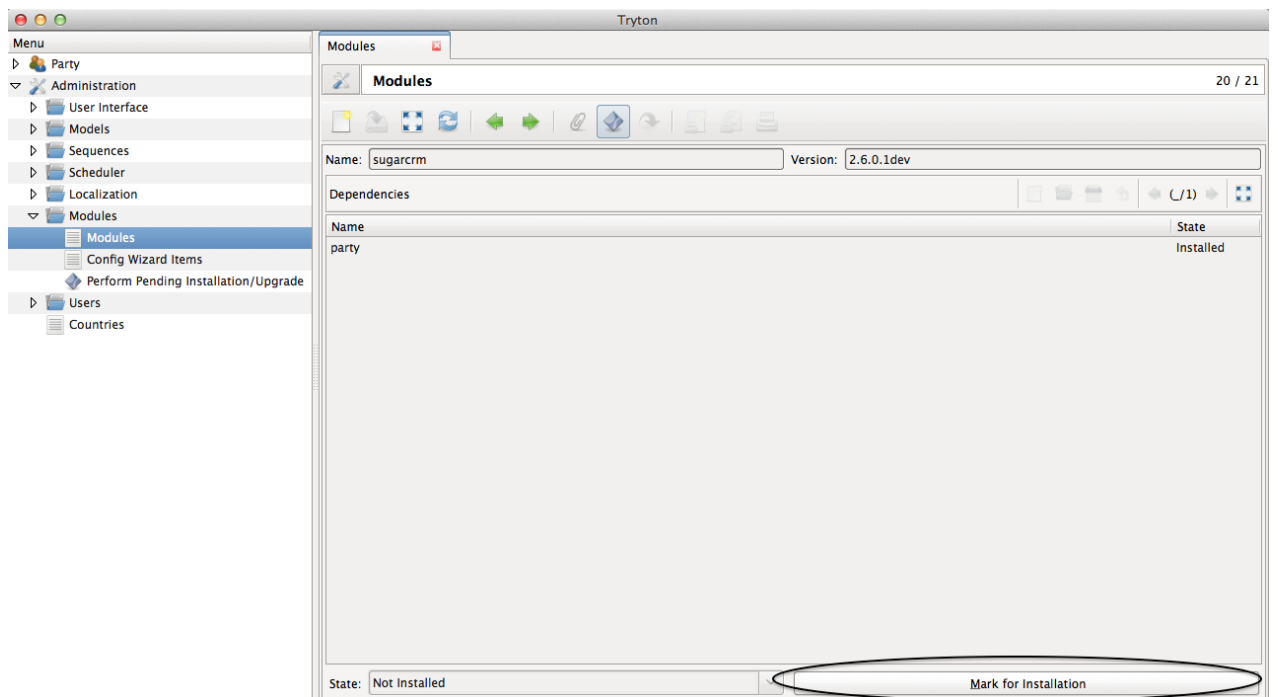
5. The command above makes the module available for use by tryton server instance in a database.
6. The module can be installed in a tryton database by following to menu:
Administration > Modules > Modules
7. This should show the modules list screen as below:

Welcome to Tryton SugarCRM's documentation!

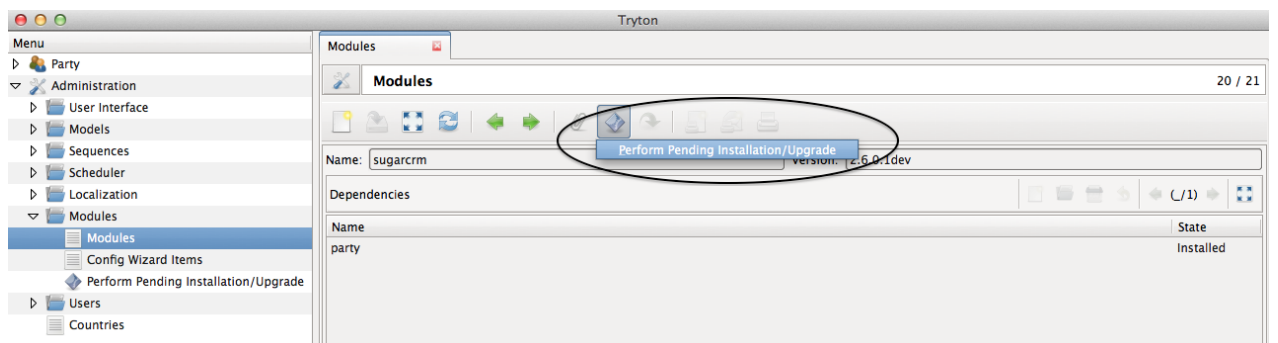


8. Install the module as shown below:

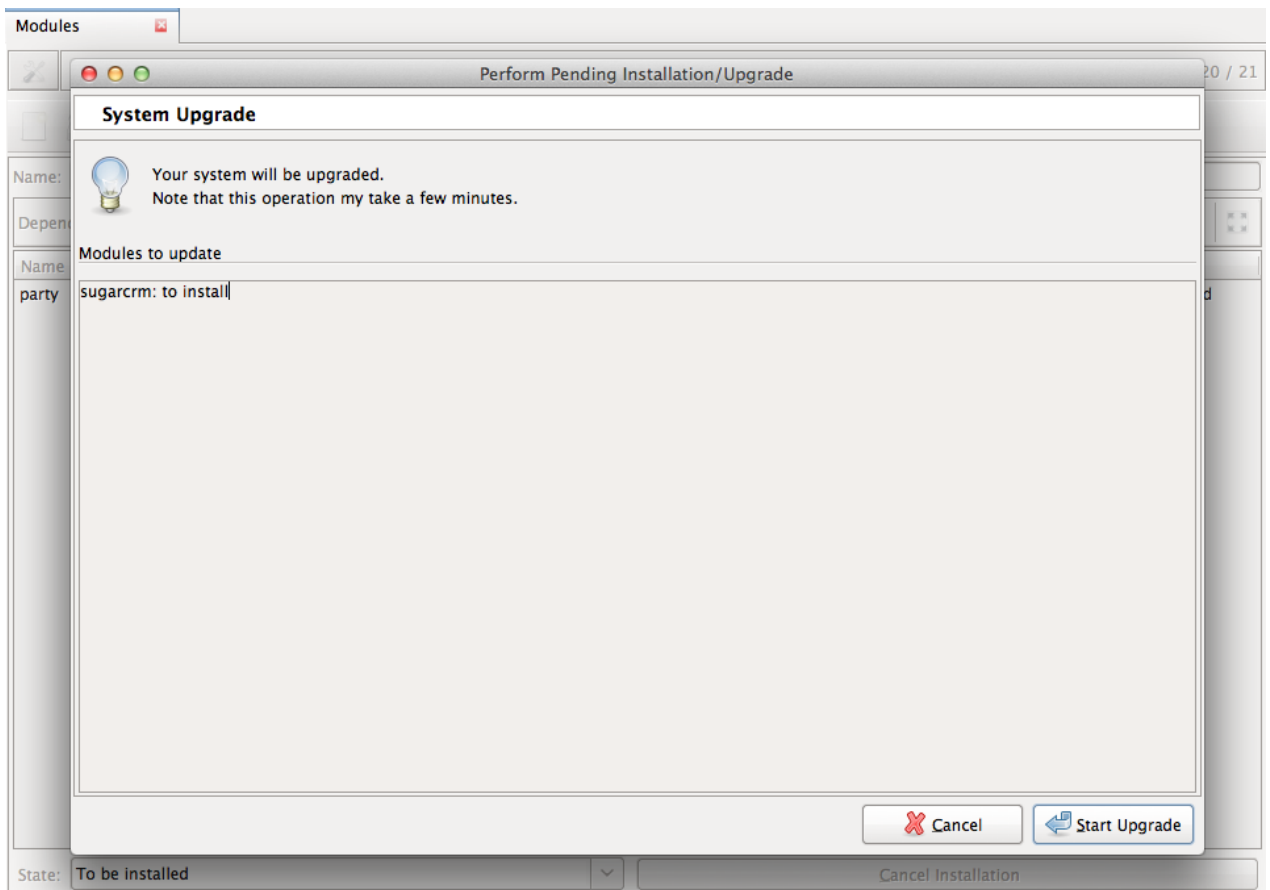
Step 1



Step 2



Step 3



Installation from PYPI

TODO

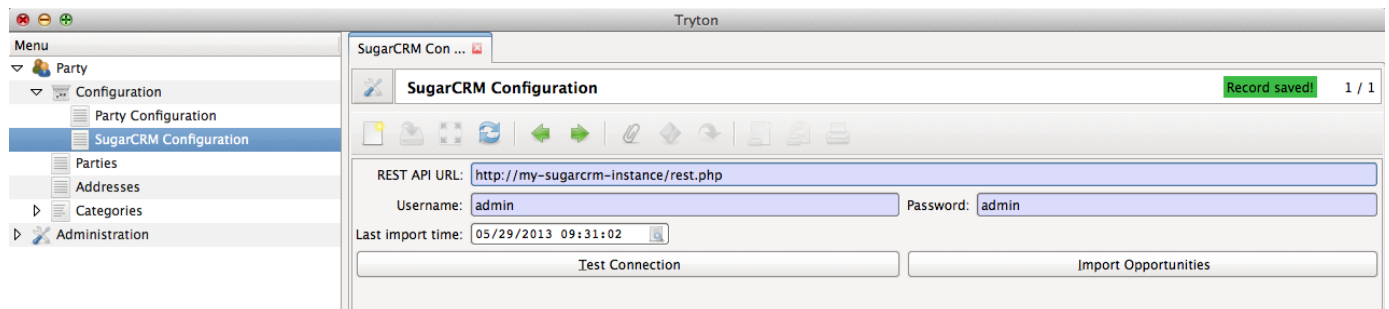
[Configure SugarCRM account](#)

Configuring SugarCRM settings

The module should be configured with the REST API URL of the SugarCRM instance. The username and password of a user with sufficient access privileges is also required. This user can simply be the admin user.

Configure SugarCRM account

Menu: Party > Configuration > SugarCRM Configuration

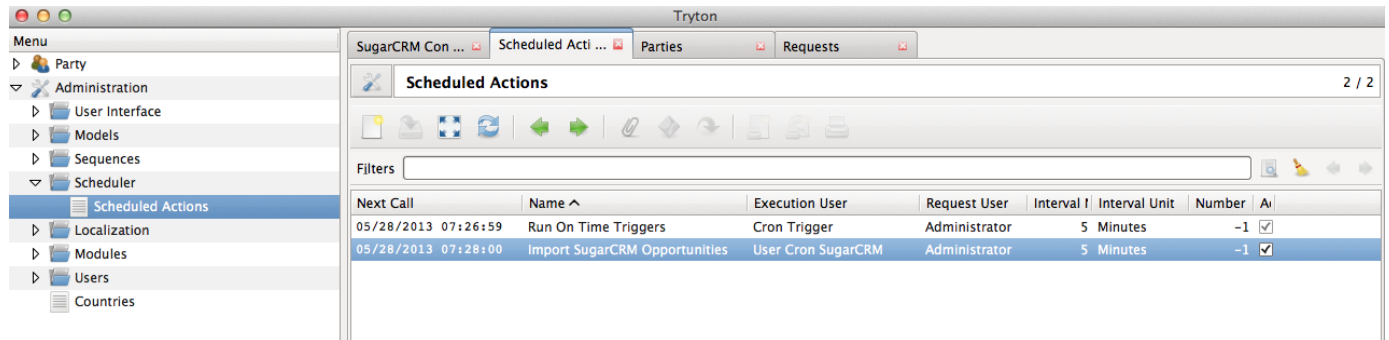


Tip

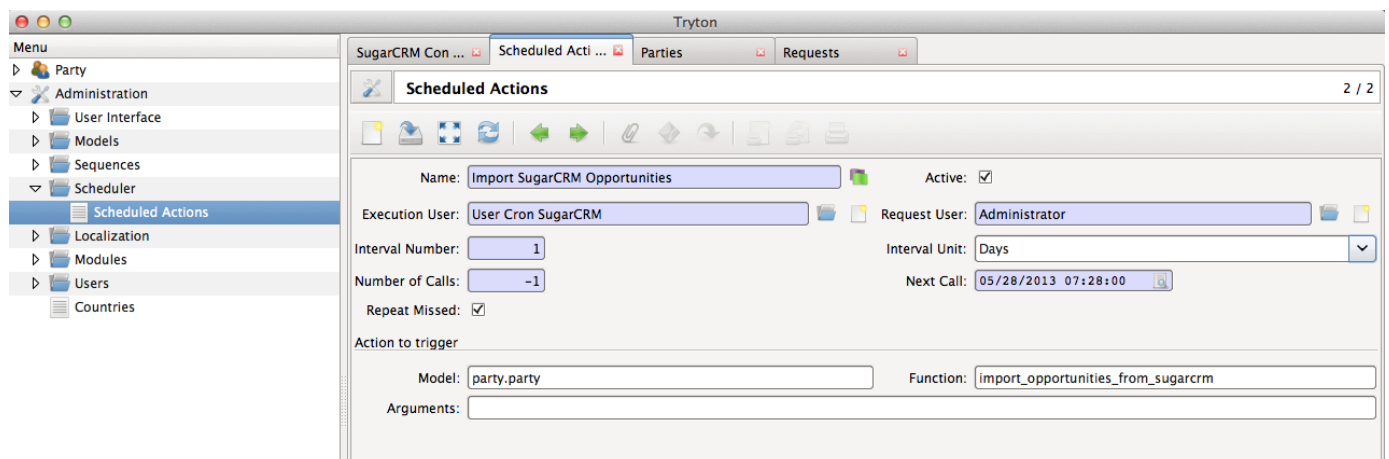
Last import time indicates the last date time at which the opportunities were imported from SugarCRM to Tryton.

Cron for importing Opportunities from SugarCRM

Menu: Administration > Scheduler > Scheduled Actions



Open the selected cron with name Import SugarCRM Opportunities.



The details are described below:

- Interval Number and Interval Unit: These fields together make up the interval duration of this cron. By default, it is set to 1 Day. This means that the import takes place once in a day. You could increase or decrease the frequency by changing Interval Number, Interval Unit.
- Next Call: Indicates the date and time in which the import from Sugar will happen the next time. You could change this time if you want to prepone or delay the import.

Tip

You need not change the time here to make a quick manual import. You could go back into [configuration](#) and click on the Import button instead.

Tip

If the time of import just does not seem right to you, check your timezone in the preferences. Tryton displays times in the timezone set in the preferences of the user.

Import Opportunities from SugarCRM

This section explains how the import of opportunities from SugarCRM will represent itself on Tryton.

Note

All the data represented below is demo data and is only for demonstration purposes.

Opportunities are imported as Parties

Only opportunities in the Closed Won state are imported in Tryton. This is periodically done by the Tryton CRON system. The default interval between two imports is a day, but can be modified to your requirements. [Cron for importing Opportunities from SugarCRM](#).

Opportunities in SugarCRM

The screenshot shows the SugarCRM interface with the following details:

- Assigned to:** Administrator, Chris Oliver, Jim Brennan, Max Jensen, Sally Bronsen, Sarah Smith.
- Sales Stage:** Value Proposition, Id. Decision Makers, Perception Analysis, Proposal/Price Quote, Negotiation/Review, **Closed Won** (highlighted).
- Lead Source:** Cold Call, Existing Customer, Self Generated, Employee, Partner.
- Expected Close Date:** Equals (dropdown menu).
- Next Step:** (empty field).
- Layout Options:** (checkbox).
- Save search as:** (input field) **Save** button.
- Modify current search:** **Update** button, **Delete** button.
- Search:** **Clear** button, **Basic Search** button, **Saved Searches** dropdown (showing -none-).

Name	Account Name	Sales Stage	Amount	Close	User	Date Created
EEE Endowments LTD - 1000 units	EEE Endowments LTD	Closed Won	R25,000.00	02/20/2013	Sarah Smith	05/23/2013 11:53
King Software Inc - 1000 units	King Software Inc	Closed Won	R25,000.00	05/03/2013	Sarah Smith	05/23/2013 11:53
Lexington Shores Corp - 1000 units	Lexington Shores Corp	Closed Won	R50,000.00	07/31/2012	Max Jensen	05/23/2013 11:53
Lexington Shores Corp - 1000 units	Lexington Shores Corp	Closed Won	R10,000.00	11/11/2012	Sarah Smith	05/23/2013 11:53
Waverly Trading House - 1000 units	Waverly Trading House	Closed Won	R10,000.00	11/13/2012	Chris Oliver	05/23/2013 11:53

Opportunities imported as Parties in Tryton

Menu: Party > Parties

The screenshot shows the Tryton interface with the following details:

- Menu:** Party > Parties.
- Parties List:**

Code	Name	Language	VAT Code
78	Lexington Shores Corp - 1000 units		
79	Waverly Trading House - 1000 units		
80	Lexington Shores Corp - 1000 units		
81	EEE Endowments LTD - 1000 units		
82	King Software Inc - 1000 units		

Opportunity View in SugarCRM

Using Attachments

SUGARCRM Welcome, [Administrator](#) [Log Out] [Employees](#) [Admin](#) [Support](#) [About](#)

Sitemap

Sales Marketing Support Activities Collaboration All

Home Accounts Contacts Opportunities Leads

Recently Viewed: [King Softwar...](#) [Follow-up on...](#) [Lexington Sh...](#) [John Doe 2](#) [Mr. John Doe](#) [John Doe LLC](#) [0-CustomersL...](#) [0-CustomersL...](#) [Mr. John Doe](#) [Qwerty Asdf](#)

Actions: [Create Opportunity](#) [View Opportunities](#) [Import Opportunities](#)

King Software Inc - 1000 units [Create](#)

[Edit](#) (2 of 5)

Opportunity Name:	King Software Inc - 1000 units	Account Name:	King Software Inc
Opportunity Amount: (INR R):	25,000.00	Expected Close Date:	05/03/2013
Sales Stage:	Closed Won	Type:	New Business
Probability (%):	40	Lead Source:	Cold Call
Next Step:		Campaign:	
Description:			

Other

Assigned to: Sarah Smith Date Modified: 05/23/2013 11:53 by Administrator

Date Created: 05/23/2013 11:53 by Administrator

Party in Tryton

Tryton

SugarCRM Con ... Scheduled Acti ... Parties Requests

Parties 5 / 5

Name: [King Software Inc - 1000 units](#) Code: 82 Active: ☒

General Accounting

Addresses

Name: [King Software Inc](#) Active: ☒

Street: 321 University Ave. Street (bis):

Zip: 63859 City: Santa Fe

Country: Subdivision:

Language:

Contact Mechanisms

Type	Value	Comment
Phone	(864) 564-5363	
Website	www.phonekid.de	
E-Mail	sugar63@example.cn	
E-Mail	info37@example.edu	
Phone	(595) 113-7306	
Mobile	(736) 647-7715	
Phone	(220) 560-1249	
Mobile	(736) 647-7715	

Categories

Name

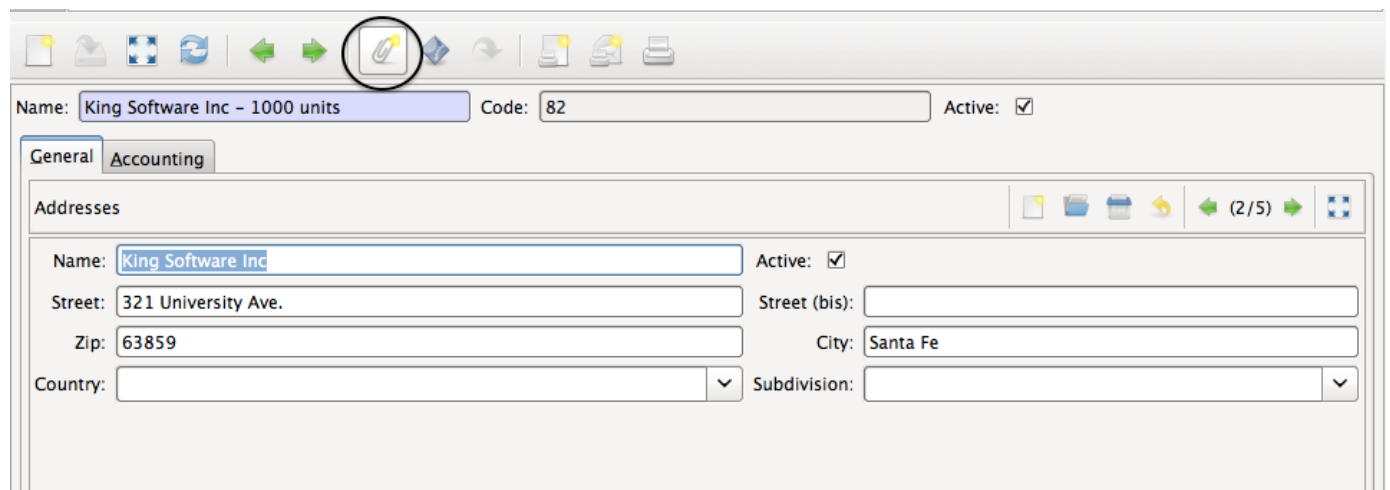
Understanding the import mappings

- Opportunities in `Closed Won` state are imported as Parties
- Accounts related to Opportunity are imported as addresses.
- Billing and Shipping addresses on each account are imported as addresses.
- Contacts related to the Opportunity are also imported as addresses.
- Any phone, fax, email or website linked to Account or Contact are imported as contact mechanisms.
- Any documents attached to Opportunity, Account or Contact are imported as attachments. It can be accessed as shown in section [Accessing Attachments](#)

Using Attachments

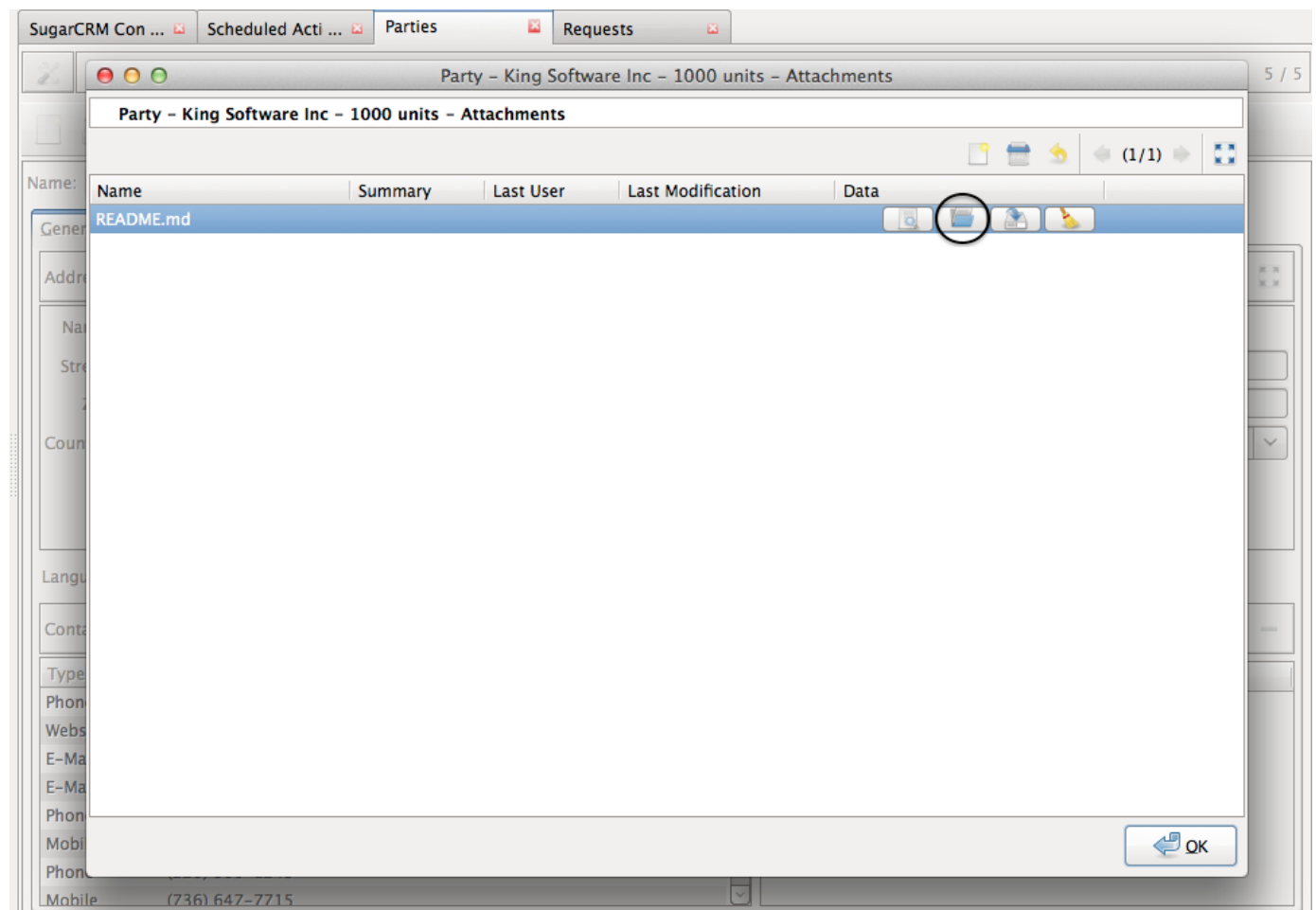
Accessing Attachments

Below is a party record with a document attached.



The screenshot shows the SugarCRM interface for a party record. The top toolbar contains several icons, with the 'Attachments' icon (a document with a paperclip) circled. Below the toolbar, the record details for 'King Software Inc - 1000 units' are displayed. The 'General' tab is active, showing the 'Addresses' section. The address details include: Name: King Software Inc, Street: 321 University Ave., Zip: 63859, City: Santa Fe, and Country: (dropdown). The 'Active' checkbox is checked.

Click the icon highlighted above to see the list of all attachments:



The screenshot shows the SugarCRM Attachments window for the party 'King Software Inc - 1000 units'. The window title is 'Party - King Software Inc - 1000 units - Attachments'. The 'Attachments' icon in the top toolbar is circled. The window displays a table with the following columns: Name, Summary, Last User, Last Modification, and Data. The table contains one row with the attachment 'README.md'. The 'Data' column for this attachment is highlighted, and the 'Attachments' icon in the bottom right corner is circled.

Name	Summary	Last User	Last Modification	Data
README.md				

Click on the icon highlighted above to open the document directly:

Using Attachments

