
Mobile Application Configuration Service User Guide

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Mobile Application Configuration Service User Guide

Overview

SugarCRM's Mobile Application Configuration Service (MACS) enables eligible users to create custom-branded versions of the SugarCRM mobile app. OEM partners, implementation partners, and customers can customize the mobile app to promote their own brand and have more control over distribution. The customized app can be deployed via the Apple App Store and Google Play Store or via a private app store for increased security and ease of distribution.

MACS offers the following features and functionality:

- Build a custom app that re-brands the SugarCRM mobile application with your personalized logo and color theme.
- Preset your Sugar instance configurations and settings in your new app.
- Generate a binary that can then be deployed via different mobile device management tools (e.g., MobileIron or AirWatch), a private app store, or a public app store (Google Play Store or Apple App Store).
- Upon future releases of the SugarCRM mobile app, download and redistribute updated versions of your customized app.

Prerequisites

To use MACS, you must belong to one of the following authorized user groups:

- Customers running a supported version of Sugar Enterprise, Ultimate, Serve, Sell Advanced, or Sell Premier
- SugarCRM's OEM partners for use and distribution with their authorized OEM solution
- Partners of eligible customers

Note: SugarCRM partners who are creating a re-branded mobile app for a customer must log in and make the necessary changes directly in the customer's account. Partners are not authorized to create and store customer apps under their own Sugar account.

Eligible users must have the following requirements in order to use MACS:

- Experience in distributing mobile applications
- A development account with [Apple](#) and [Google](#) in order to allow app

distribution

- An active account on SugarCRM.com

We also recommend that you familiarize yourself with your Android and Apple developer accounts beforehand in order to generate a provisioning profile, certificate, and signing key.

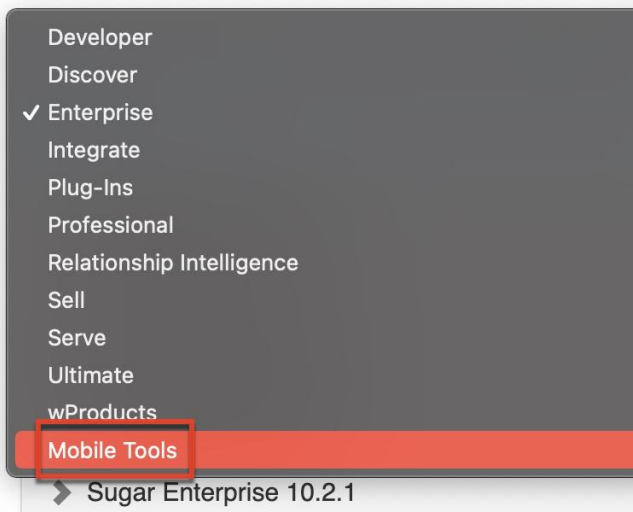
Note: A partner or developer can generate a binary for you, however, you must use your provisioning profile and certificates for the production release.

Accessing the Configurator

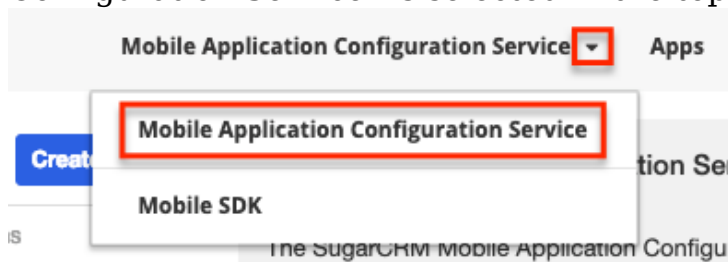
Once the above items are confirmed, log into your SugarCRM.com account then either navigate to the [Mobile Tools Portal](#) page or to the [Download Manager](#) page and select "Mobile Tools" from the dropdown.

Home / Downloads

Downloads



Once you are in the Mobile Tools Portal page, ensure "Mobile Application Configuration Service" is selected in the top bar's dropdown menu.



The other dropdown option allows mobile developers to download Sugar's Mobile

SDK.



Configurator List View

The Mobile Application Configuration Service list view shows all apps created by users in your account. From this page, you can [create a new app](#) as well as view details and take actions on existing apps.

User	Application Name	Mobile SDK Version	Status	Latest Build	Builds	Actions
exampleuser	ACME CRM	3.1	❗	1.0	1	Edit Create Build Delete
exampleuser	Ace of Spade	3.1	✅	1.0.3	3	Edit Create Build Delete
exampleuser	Example App 1	4.0.1	⏸	3.0	3	Edit Create Build Delete
exampleuser	Example App 2					Continue Delete

The list view offers the following information and actions for existing apps:

Column	Description
User	The user who created this app
Application Name	The name of the app
Mobile SDK Version	The SugarCRM mobile app version the app is based on
Status	The status of the most recent build: <ul style="list-style-type: none">• Blank: No builds have been created for this app.• Greycross-out: The build was canceled.• Red exclamation mark: The build failed.• Green checkmark: The build


	completed successfully.
Latest Build	The app version most recently built Note: Click the version to view build details to the right of the page. If the build was successful, it can be downloaded from below the list of details.
Builds	The total count of builds that have been created for the app Note: Click the number to see the app's list of builds where you can also check the status of a build and download completed builds.
Actions	<p>If one or more required fields are missing for the app, the following options will be available:</p> <ul style="list-style-type: none"> • Continue: Resume creating the app. • Delete: Remove the app. <p>Once all required fields are completed for the app, the following options will be available:</p> <ul style="list-style-type: none"> • Edit: Modify the app's configurations. • Create Build: Create a new version of the app. • Delete: Remove the app.

Creating and Editing an App

With "Mobile Application Configuration Service" selected in the top bar's dropdown menu, you can begin building your app by clicking the Create New App button above the list of apps.

Apps

[Create New App](#)

User	Application Name	Mobile SDK Version	Status	Latest Build	Builds	Actions
exampleuser	ACME CRM	3.1		1.0	1	Edit Create Build Delete

App Customization

The first step in building your app is to customize its skin (e.g Name and Logos). The App Customization page allows you to configure the following items:

- **Application Platform:** Select the platform(s) on which your app will be used (i.e. iOS or Android devices).

Application Platform

- iOS and Android App
- iOS App Only
- Android App Only

- **Name:** Enter the name that will appear under the app icon on the device's home screen. The name can be up to 20 characters long, but 11 or fewer characters is recommended to ensure it is displayed in full.

Name

Name*

Ace of Spade 

- **Logos:** Drag and drop your logo image file into the appropriate boxes for the iOS and Android app icons, as well as the image file for your company logo which will be used inside the app.

Logos

Application Icon For iOS*



Application Icon For Android*



Company Logo*



Note: The image must be in a Scalable Vector Graphics (SVG) format with a minimum size of 256 x 256 pixels. For best image quality throughout the app, you must create the SVG image using Adobe Illustrator or another scalable vector graphics tool.

- **Splashscreen:** Select the desired background color for the splash screen.

Splashscreen

Background Color

 #982c2c

- **Primary button:** Select the desired background and font colors for the primary button, which is the Log In button.

Primary button

Background Color

Font Color

- **Navigation:** Select the desired colors for the background, font, icon (e.g. plus icon), and navigation link (e.g. Cancel and Save) in the headers.

Navigation

Background Color

Font / Icon Color

Navigation Link Color

- **Login Settings:** Enter the appropriate values for the fields below:

- **Sugar Instance URL:** Enter your Sugar instance URL if you wish to pre-populate this field on your users' login screen.
Note: "http://" can be included or left off without effect, but be careful to only include "www." if this is included when accessing your instance from a desktop browser.
- **Enable Single Sign-On:** Check this box if your Sugar instance is configured to allow single sign-on authentication.
- **Allow Edit Mode for Server URL and Single Sign-On:** Check this box to allow users to edit the server URL and single sign-on setting.

Login Settings

Sugar Instance URL

Enable Single Sign-On

Allow Edit Mode for Server URL and Single Sign-On

- **About:** If you are an OEM customer, some of the fields in the About section will not appear until you first enter an unlock key. However, the following fields are always displayed:
 - **Unlock Key:** Enter your company's unlock key code, if you have one. If you do not know the unlock key, reach out to your SugarCRM contact for the OEM program.
 - **Support URL:** Enter the URL that will link users to your organization's support site via the login screenThe following fields are displayed after a valid unlock key has been entered:

- **Show "Powered by SugarCRM"**: Check this box if you wish to display "Powered by SugarCRM" on the splash screen.
- **Privacy Policy**: Enter the URL that will link users to your organization's privacy policy via the login screen and About page.
- **Terms and Conditions**: Enter the URL that will link users to your application's terms and conditions via the login screen and About page.
- **Trademark text**: Enter the trademark text you want

Note: The help displayed by SugarCRM's text in the About page link, and terms and conditions link are also displayed on the login screen.

About

Unlock Key

Show "Powered by SugarCRM"

Support URL

Privacy Policy*

Terms and Conditions*

Trademark text

As you hover over or populate any fields on the App Customization page, the Help panel on the right displays a preview of the customized layout using the color, font, image, etc. you have defined. In addition, the Help panel provides information regarding the current field.

Splashscreen

Background Color

Primary button

Background Color Font Color

Navigation

Background Color Font / Icon Color

Navigation Link Color

Login Settings

Sugar Instance URL

Cancel Edit Contact Save

First Name
Tona

Last Name
Somerville

Title
IT Developer

Office Phone
(399) 251-9756

Email
kid.ga@example.info

Add email

Primary Address
48920 San Carlos Ave
Parsippany NJ 44206 USA

Assigned to
jim Brennan

Delete

Font / Icon Color

Font and icon color for header.

When you are satisfied with your changes, click "Update and Close" at the bottom of the page to preserve your changes and return to the list of apps. If you wish to continue to the next page, simply click "Next".

General Settings

The General Settings page connects MACS to your Apple and/or Google developer accounts so that you can successfully distribute the new mobile app via your chosen means. If you do not have an Apple or Google developer account or require assistance with the account, please contact your IT department or the team responsible for distributing the mobile app for your company.

The following fields in the Package Names section must be populated before you can successfully create and distribute an app via MACS. For more information on acquiring the items discussed in this section, please refer to the [App Signing for MACS](#) article.

Note: If you selected "iOS App Only" or "Android App Only" as the Application Platform on the App Customization page, only some of the following fields will appear.

- **iOS bundle ID:** Enter the iOS bundle ID, which must be registered with Apple. This ID identifies your application in the App Store and allows Apple to recognize any updates made to your app in the future.
Note: This is a required field and cannot be altered after uploading the first build to the App Store.
- **iOS Distribution Certificate:** Drag and drop your iOS distribution certificate file into this field. The file must be in .p12 extension format and is required for distributing the app. Please note that Apple has strict guidelines on distribution, therefore, it is recommended that you be familiar with iOS distribution guidelines prior to using MACS. For more information, please refer to Apple's [App Distribution Guide](#).
Note: If you add an iOS Distribution Certificate, then you must also add an iOS Provisioning Profile. If you are only testing the app, it is recommended you do not add either of these items.
- **iOS Provisioning Profile:** Drag and drop your iOS provisioning profile file into this field. This file is required for distributing your app. Please note that you are required to download a distribution profile for each new app via the [Apple developer portal](#).
Note: If you add an iOS Provisioning Profile, then you must also add an iOS Distribution Certificate. If you are only testing the app, it is recommended you do not add either of these items.
- **Android Package Name:** Enter your Android package name. This identifies your app in the Google Play Store.
Note: This is a required field and cannot be altered once you have published the app in the Google Play Store.
- **Android Signing Key:** Enter your Android signing key.
Note: If this field is left empty, the binary will automatically be signed with a placeholder key. However, you must re-sign the binary with your own key prior to distributing the app.

Package Names

<input type="text" value="iOS bundle ID*"/>	<input type="text" value="Android Package Name*"/>
<input type="text" value="iOS Distribution Certificate"/>	<input type="text" value="Android Signing Key"/>
<input type="text" value="iOS Provisioning Profile"/>	

Note: The first time you compile your app on MACS, it is recommended to only provide the iOS bundle ID and Android package name in the Package Names section. While you will not be able to distribute your app without providing the certificate and profile information, leaving these off will allow you to confirm that you are able to successfully compile your app.

When you hover on or populate any fields on the General Settings page, the Help panel on the right will display additional information regarding the field and what it represents, along with any important notes.

The screenshot shows the 'Package Names' section with three input fields: 'iOS bundle ID*' (containing 'com.acme.crm'), 'iOS Distribution Certificate', and 'iOS Provisioning Profile'. The 'iOS bundle ID*' field is highlighted with a red box and a green checkmark. A red arrow points from this field to a 'Help' panel on the right. The 'Help' panel contains the following text: 'iOS bundle ID: The bundle identifier uniquely identifies your application in Appstore and lets iOS recognize any updates to your app. Your bundle ID must be registered with Apple. The bundle ID can not be changed after you upload your first build to Appstore.'

Once you have populated all of the required fields, click "Update and Close" at the bottom of the page to preserve your changes and return to the list of apps. If you wish to continue to the next page, simply click "Next".

Build Creation

Now that MACS is connected to your Apple and/or Google developer accounts, you can update the version details for your app and finalize the build.

The following fields must be populated before you can successfully create the build:

- **Mobile SDK Version:** Select the version of the SugarCRM mobile app from which you want to build your app. It is recommended to always use the latest release to take advantage of recent enhancements and fixes.
- **Subscription Key:** Enter the subscription key for your Sugar instance. If

you have a developer or partner account and are creating the app for your customer, you will need to enter the customer's subscription key in order to prevent the app from timing out after 30 days.

- **Version:** Enter the version number for your app (e.g. 1.0.3).
- **iOS Distribution Certificate Password:** Enter the password for your iOS distribution certificate.

Note: This field will only appear if an iOS distribution certificate is attached via the [General Settings](#) page.

- **Android Signing Key Password:** Enter the password for your Android signing key.

Note: This field will only appear if an Android signing key is attached via the [General Settings](#) page.

Build Creation

Mobile SDK Version*	Version*
<input type="text" value="4.0.1.363"/>	<input type="text" value="1.0.3"/>
SDK Version Info	iOS Distribution Certificate Password*
<input type="text" value="4.0.1.363"/>	<input type="password" value="....."/>
Subscription Key	Android Signing Key Password*
<input type="text" value="9ed40e61a9f7d64fb440ae2c8f5c7c2d"/>	<input type="password" value="....."/>

When you hover over or populate any fields on the Build Creation page, the help panel on the right will display additional information regarding the field and what it represents.

App Customization > General Settings > Build Creation

Build Creation

Mobile SDK Version*	Version*
<input type="text" value="4.0.1.363"/>	<input type="text" value="1.0.3"/>
SDK Version Info	iOS Distribution Certificate Password*
<input type="text" value="4.0.1.363"/>	<input type="password" value="....."/>
Subscription Key	Android Signing Key Password*
<input type="text" value="9ed40e61a9f7d64fb440ae2c8f5c7c2d"/>	<input type="password" value="....."/>

Cancel Create App and Build




Help

Android Signing Key Password
Android requires that all apps be digitally signed with a certificate before they can be installed. Android uses this certificate to identify the author of an app, and the certificate does not need to be signed by a certificate authority. Use the password that you had used for your Android signing key.

To finalize and build the new app, simply click the Create App and Build button at the bottom of the page. Please note that depending on the size of your binary, this process may take a few minutes to complete. You can view the build's progress via the progress wheel displayed in the Status column on the list of builds.

Builds for: Ace of Spade

Create Build

Version	Build	Mobile SDK Version	Status	Created On	Build Downloads
1.0.3	4	3.1		May 31st 2016, 6:35:10 pm	
1.0.2	3	3.1		May 24th 2016, 4:42:51 pm	android / ios
1.0.1	2	3.1		May 23rd 2016, 5:58:32 pm	android / ios

Distributing the App

With the new app successfully created, it is now time to distribute the app to your users. We strongly recommend that your company designates an individual or team to manage the app distribution as the app will need to be updated on a regular basis, whenever new versions of the SugarCRM mobile app are released, as described in the [Maintaining the App](#) section below.



Downloading the App

Before the app can be successfully distributed to your users, you must first download the app from MACS using the following steps:

1. Navigate to your list of apps.
2. Locate the desired app and click the build count (e.g. 4) to view the list of available builds for the app.

Apps




Create New App

User	Application Name	Mobile SDK Version	Status	Latest Build	Builds	Actions
exampleuser	ACME CRM	3.1		1.0	1	Edit Create Build Delete
exampleuser	Ace of Spade	3.1		1.0.3	3	Edit Create Build Delete

3. Click the appropriate link(s) (e.g. Android or iOS) on the far right of each build's row to begin downloading the build to your local machine.

Builds for: Ace of Spade

Create Build

Version	Build	Mobile SDK Version	Status	Created On	Build Downloads
1.0.3	4	3.1		May 31st 2016, 6:35:10 pm	android ios
1.0.2	3	3.1		May 24th 2016, 4:42:51 pm	android / ios
1.0.1	2	3.1		May 23rd 2016, 5:58:32 pm	android / ios

Once the download completes, you can distribute the app to your users.

Distribution Methods

Once the app is successfully downloaded to your computer, you can begin distributing it to your users. There are three methods you can use to distribute your app:

- Via your preferred [mobile device management](#) solution
- Publicly via the [App Store](#) or [Google Play Store](#)
- Privately via your internal Enterprise store
Note: If you wish to distribute via your internal Enterprise store, please reach out to your company's IT group.

Distributing to iOS

This section will cover the different ways you can distribute your iOS app. It is important to note that the iOS distribution method depends on your Apple developer account type. Before distributing your app to iOS it must be digitally signed as described in the [App Signing for MACS](#) article.

Distribution Type	Distribution Methods
Development	<ul style="list-style-type: none">• Install the app via iTunes or Xcode
Beta Testing	<ul style="list-style-type: none">• Distribute via Apple TestFlight• Distribute via HockeyApp for iOS• Distribute via other services similar to HockeyApp
Production	<ul style="list-style-type: none">• Distribute via MDM vendors (e.g. MobileIron and AirWatch) Note: This distribution method requires an Enterprise Apple dev account.• Distribute privately via internal Enterprise stores Note: This distribution method requires an Enterprise Apple dev account. If you wish to distribute via your internal Enterprise store, please reach out to your company's IT group.• Distribute publicly via the Apple

	<p>AppStore Note: This distribution method requires either an Enterprise or Individual Apple dev account.</p>
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The iOS distribution certificate and provisioning profile must be entered via the [General Settings](#) page and the certificate password must be entered via the [Build Creation](#) page prior to downloading the app.

Before you can distribute via the App Store, you must have a production certificate, a registered App ID, and a distribution provisioning profile. For more information on completing these steps, please refer to the [App Signing for MACS](#) article. The app must also be approved by Apple before it becomes available in the store. Because of the pre-approval process, customers building iOS apps for their own, internal use may not wish to rely on the App Store for distribution. Once approved, the app will then be available to download from the Apple App Store. An alternative is to use the [Apple iOS Developer Enterprise Program](#), however, this does require an annual subscription.

Note: In order to deploy your app into the public App Store, you must abide by the SugarCRM Terms of Service and Privacy legal agreements. Please contact the [Sugar legal team](#) in order to have the app content reviewed before production deployment.

Distributing to Android

This section will cover the different ways you can distribute your Android app. Before distributing your app to iOS it must be digitally signed as described in the [App Signing for MACS](#) article.

Distribution Type	Distribution Methods
Development	<ul style="list-style-type: none"> • Send the app via email • Upload the app to a cloud service (e.g. Dropbox) and access it via Android device • Install the app via Android SDK command-line tools Install the app via an Android SDK emulator (e.g. Genymotion) • Distribute via email, website download, or a cloud service <p>Note: Please refer to Android's Alternative Distribution Options article for more information on</p>

	distributing via their open platform.
Beta Testing	<ul style="list-style-type: none"> • Distribute via HockeyApp for Android • Distribute via other services similar to HockeyApp • Distribute via email, website download, or a cloud service <p>Note: Please refer to Android's Alternative Distribution Options article for more information on distributing via their open platform.</p>
Production	<ul style="list-style-type: none"> • Distribute via MDM vendors (e.g. MobileIron and AirWatch) • Distribute via email, website download, or a cloud service <p>Note: Please refer to Android's Alternative Distribution Options article for more information on distributing via their open platform.</p> <ul style="list-style-type: none"> • Distribute privately via internal Enterprise stores <p>Note: If you wish to distribute via your internal Enterprise store, please reach out to your company's IT group</p> <ul style="list-style-type: none"> • Distribute publically via the Google Play Store

The signing key must be entered via the [General Settings](#) page and the signing key password must be entered via the [Build Creation](#) page prior to downloading the app. For more information on generating a private key, please refer to Oracle's [Key and Certificate Management Tool](#) article.

Note: In order to distribute your app via the Google Play Store, you must abide by the SugarCRM Terms of Service and Privacy legal agreements. Please contact the [Sugar legal team](#) in order to have the app content reviewed before production deployment.

Distributing via Mobile Device Management

Mobile device management is implemented via a third party product (e.g.

MobileIron or AirWatch) that provides management features for mobile devices. It enables you to remotely push apps to devices for instant installation, remotely push updates, and remotely remove apps.

Please note that MACS currently only supports app wrapping as a mobile device management solution. App wrapping allows you to embed security (e.g. encryption code) and control capabilities into your app without accessing the app's source code.

Every vendor may have different requirements for app wrapping, however, most require the following items:

- An iOS mobile app .ipa file or Android .aab file
- iOS and/or Android Distribution Provisioning Profiles
- iOS Distribution Certificate or Android Signing Key

Maintaining the App

Once a new app is created, it will need to be maintained on a regular basis. To do this, you will need to create a new build for your existing app which will then be distributed to your users as an update. There are two main situations where you would need to create a new build:

- A new version of the SugarCRM mobile app has been released.
- You have made changes to the custom app via MACS.

Use the following steps to create a new build in MACS:

1. Navigate to the list of apps and click "Create Build" to the far right of the desired app's (e.g. Ace of Spade) row.

Apps							Create New App
User	Application Name	Mobile SDK Version	Status	Latest Build	Builds	Actions	
exampleuser	ACME CRM	3.1	!	1.0	1	Edit Create Build Delete	
exampleuser	Ace of Spade	3.1	✓	1.0.3	3	Edit Create Build Delete	

Alternatively, you can also click the app's build count (e.g. 3) then click "Create Build" above the list of builds.

Builds for: Ace of Spade

Create Build

Version	Build	Mobile SDK Version	Status	Created On	Build Downloads
1.0.2	3	3.1	✔	May 24th 2016, 4:42:51 pm	android / ios
1.0.1	2	3.1	✔	May 23rd 2016, 5:58:32 pm	android / ios

2. Enter the appropriate values in the fields on the Create Build form.
 - **Mobile SDK Version:** Select the latest production version of the SugarCRM mobile app.
 - **Subscription:** Enter the Enterprise or Ultimate subscription key for your Sugar instance. If you have a developer or partner account and are creating the app for your customer, you will need to enter the customer's subscription key in order to prevent the app from timing out after 30 days.
 - **Version:** Enter the new version of your app (e.g. 1.0.3).
 - **iOS Distribution Certificate Password:** Enter the password for your iOS distribution certificate.
Note: This field will only appear if an iOS distribution certificate is attached via the [General Settings](#) page.
 - **Android Signing Key Password:** Enter the password for your Android signing key.
Note: This field will only appear if an Android signing key is attached via the [General Settings](#) page.
3. Click "Start Build" to begin the process. Please note that the build may take a few minutes to complete.




Create Build Cancel Start Build

Mobile SDK Version*	Version*
4.0.1.363	1.0.3
SDK Version Info	iOS Distribution Certificate Password*
4.0.1.363
Subscription Key	Android Signing Key Password*
.....

You can easily monitor the process by navigating to the app's list of builds and viewing the progress wheel in the Status column. When the build is successfully completed, a green checkmark icon will display in the build's Status column. At this point, you will need to [download and distribute](#) the updated version of your app.

Builds for: Ace of Spade

[Create Build](#)

Version	Build	Mobile SDK Version	Status	Created On	Build Downloads
1.0.3	4	3.1		May 31st 2016, 6:35:10 pm	
1.0.2	3	3.1		May 24th 2016, 4:42:51 pm	android / ios
1.0.1	2	3.1		May 23rd 2016, 5:58:32 pm	android / ios

Last Modified: 2023-05-25 13:56:11