W-Systems Product Installation Guide

W-Systems Product Installation Guide	
Overview	
Prerequisites	
Downloading the Installation Package	
Installing the Package	
Upgrading Your Installation	б

W-Systems Product Installation Guide

Overview

In 2020, SugarCRM acquired W-Systems, the then-largest, global Sugar Elite partner. W-Systems had an extensive portfolio of add-on products and plug-ins for SugarCRM, and a robust customer base using these products with their Sugar instances. As such, Sugar has continued to provide documentation and occasional updates to some of the most-used <u>W-Systems products</u>. This guide walks through the required installation steps for most W-Systems plug-ins.

For information on using the installed plug-in or connector, please refer to the User Guide for your <u>W-Systems product</u>.

Note: Sugar has been incorporating many W-Systems plug-ins into the core product. Those plug-ins should never be installed in an instance that has the corresponding built-in capability. See <u>Downloading the Installation Package</u> for further information.

Prerequisites

Each W-Systems product is an extension to Sugar's CRM platform and must be downloaded and installed by an administrator on the Sugar instance where it will be used. If you have not yet purchased the product you want to use, please contact your <u>Sugar partner</u> or Customer Success Manager before continuing with the installation.

Also, please ensure that you have upgraded your Sugar instance to at least the minimum supported version of Sugar. For more information on supported platforms, please refer to the <u>W-Systems Supported Platforms</u> page.

You must be a Sugar system administrator to perform the installation steps outlined on this page.

Downloading the Installation Package

Starting with Sugar 11.1, Sugar began incorporating the following W-Systems products into Sugar core as built-in functionality. They should never be installed in an instance that has the built-in capability. For more information on which versions are compatible, refer to the respective Help Article linked below:

- <u>wDocs</u>
- <u>wDrive</u>
- <u>wMaps</u>

For customers who are eligible to use wDocs, wDrive, or wMaps, the package will be available for download via the Downloads page in your sugarcrm.com account once you have purchased them from your Sugar partner or Customer Success Manager

All other W-Systems plug-ins for Sugar must be acquired directly from <u>Sugar Sales</u> <u>or Sugar Support</u>. Please contact your <u>Sugar partner</u> or Customer Success Manager for the module loadable package that is compatible with your version of Sugar as outlined on the <u>W-Systems Supported Platforms</u> page.

Save the installation package to a directory that is accessible by the Sugar administrator user who will complete the installation. The package will be a zip file, which can then be uploaded to Sugar's Module Loader utility, as described in the following sections.

Installing the Package

Once you have downloaded the package (e.g. wMaps.v.X.X.zip), you can upload it to your Sugar instance via Module Loader.

Note: If you are upgrading an existing package, please skip to the <u>Upgrading</u> section.

1. Navigate to Admin > Module Loader.



- 2. Click the "Choose File" button in the Module Upload panel to open a file selection window from your browser.
- 3. Find and select the .zip package that you downloaded in the <u>previous</u> <u>section</u>.

Set Accounts • Contacts • Opportunieads		w 🗢	Q Search	01
9 Module Loader	Favorites screenshots Recents			
The following extensions are installed on this system:	wMaps_v8.04.zip		÷	
Name \ominus Action	Desktop 755 KB			Π
	Documents			
	💭 Jownloads			
	SugarFuel			
	jshaheen			
	Creative CI			
	Locations			Ē
Module Choose File Vo file chosen Uploa	Network			
Name \ominus Install elete	Options		Cancel Open	ole

4. Click the Upload button to load the package to Sugar.

Module C	hoose File	wMaps_v8.04.zip	Upload	

5. Once the upload has completed, click the Install button next to the package's name.

Module Choose File No file chosen	Upload	
Name 🔤	Install	Delete
wMaps	Install Delete F	Package

6. Click "Commit" to run the installation. If you are presented with a license agreement, you must review the terms and select "Accept" to continue with installation.



7. Wait for the installation to complete before continuing to the next installation steps.

Note: If installation errors occur, Sugar will display the errors with details of what potentially caused the issue(s). You can click on "Display Log" to view details of what occurred during the installation process. Work with your system administrator to troubleshoot and fix the errors, and then reattempt the installation procedure.

- 8. Next, navigate to Admin > Repair and perform the following repair activities. For more information on performing repair activities in Sugar, please refer to the <u>Repair</u> documentation.
 - Rebuild JS Grouping Files
 - Quick Repair and Rebuild
- 9. Finally, clear your browser's cache to complete the installation.

The plug-in installation is now complete.

Upgrading Your Installation

To upgrade your W product to a newer version, the older version must first be uninstalled. After completing the uninstallation, the newer version can be installed following the <u>installation instructions</u> above.

- 1. Navigate to Admin > Module Loader.
- 2. Locate the W product in the Installed Packages panel and click the adjacent Uninstall button:

Module Loader

The following extensions are installed on this system:			
Name 🔤	Action	Enable/Disable	
wMaps	Uninstall	Disable	

3. **Important!** When the "Ready To Uninstall" page appears, select the option "Do Not Remove Tables" and then click "Commit":

Ready	To Uninstall	
Remove Ta	bles' 🔿	Do Not Remove Tables 🔘
Commit	Cancel	

4. Upon completing, Sugar will display a confirmation message. Click "Back to Module Loader" to delete the old package.



- 5. On the Module Loader page, click "Delete Package" next to the package name to remove it from Sugar.
- 6. Refresh your browser to complete the uninstall process.
- 7. Now, follow the <u>installation instructions</u> to install the latest package of the product.

Last Modified: 2022-05-12 21:23:57