wDrive User Guide

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wDrive User Guide

Overview

The wDrive plug-in for Sugar is a paid add-on that lets you download and upload files to and from your local drive to Google Drive, Dropbox, or OneDrive. Your documents stay synced in real-time. This guide covers how users can engage with wDrive for SugarCRM after it has been installed. For more information on installing wDrive to your Sugar instance, please refer to the <u>W-Systems Product Installation Guide</u>.

Note: This guide pertains to the latest release of wDrive. If you are not using the latest version of wDrive, then you may not have access to some of the features listed on this page. Please refer to the <u>W-Systems Supported Platforms</u> page for more information on the latest package versions.

Features

- **Unified Software Environment**: No more siloed software; wDrive enables you to access your cloud storage and customer data in one place.
- **Multiple Platform Support**: Whether you are using Google Drive, Dropbox, or OneDrive, wDrive can connect to your platform of choice.
- **Sugar Document Automation**: If you are a <u>wDocs</u> Document Automation user, wDrive can store any merged document in the Cloud.
- **DocuSign eSignature Support**: Send your cloud-stored documents to DocuSign, and then forward them for review and signage via email.
- Your Document Storage in Sugar: Download and upload files to and from your local drive to Google Drive, Dropbox, or OneDrive. Your documents stay synced in real-time.
- **Create Docs From Sugar**: Use a one-click button in Sugar to create a document from a template in Google Drive, Dropbox, or OneDrive.
- **Create Shareable Links**: Use shareable links to send documents to coworkers, customers, partners, and more.
- **Folder Options**: wDrive enables you to create and define your file and folder structure. You also have the option to set a default file path for your documents.
- **Drag & Drop Your Files to Sugar**: Use drag and drop to easily and quickly upload files to your document storage solution in Sugar.
- **Merge Documents With wDocs**: wDrive can work together with <u>wDocs</u>, our Document Automation solution for Sugar, and directly stores any merged documents in your cloud storage platform of choice.
- **Sign Documents with DocuSign**: Send documents stored in your cloud storage platform of choice to DocuSign, and then forward them for review

and signage via email. This functionality is also available for documents generated with \underline{wDocs} .

Using wDrive

- Dropbox Integration with Sugar
- <u>Google Drive Integration with Sugar</u>
- **OneDrive Integration with Sugar**

The wDrive package lets users create three dashlets in Sugar: the **Dropbox Integration Dashlet**, the **Google Drive Integration Dashlet** and the **OneDrive Integration Dashlet**. These dashlets create integrations from Sugar and each Cloud app.

Dropbox, Google Drive and OneDrive can be accessed from Sugar. Files and folders can be shared from within Dropbox, Google Drive, and OneDrive dashlets.

Dropbox Integration with Sugar

- Dropbox Dashlet Setting Configuration in Sugar
- <u>Dropbox Dashlet Integration</u>
- <u>Dropbox Integration with wDocs</u>
- <u>Preview Files</u>
- <u>Sort Files and Folders</u>
- Dropbox File Revision Management
- Dropbox Integration with Sugar Connector to DocuSign

To link a Dropbox application to Sugar, users need to follow the steps below.

- 1. Go to https://www.dropbox.com/developers/apps
- 2. Create a **new Dropbox App** from the **Create app** option.

My apps	
You haven't created any apps.	

reate app

仚

3. Choose the **Dropbox API** option.

Create a new app on the DBX Platform		¢	避 Miha Bulacu 👻
1. Choose an API			
Dropbox API For apps that need to access files in Dropbox: Learn more	Dropbox Business API For apps that need access to Dropbox Business team info. Learn more		

4. Choose the Type of access you will need for your app. In this case, select Full Dropbox. 2. Choose the type of access you need

App folder – Access to a single folder created specifically for your app. Full Dropbox – Access to all files and folders in a user's Dropbox.	Learn r	more about access types	
Full Dropbox – Access to all files and folders in a user's Dropbox.	٢	App folder – Access to a single folder created specifically for your ap	ıp.
	0	Full Dropbox – Access to all files and folders in a user's Dropbox.	

- 5. Name your app with the desired name.
- 6. Go to the **Settings** tab of your app and add in the **Redirect URIs** field the URL of your Sugar instance followed by /custom/dropbox authentication redirect.html.

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Settings	Branding	Analytics	
Status		Development	Apply for production
Development u	users	Only you	Enable additional users
Permission typ	e	Full Dropbox 0	
App key App secret		lakbch0rdyqusmz Show	
OAuth 2		Redirect URIs https://wsugarqa.w-systems.com/sugar_930ult/custom/dropbox_callback.html Add	
		Allow	

Dropbox Dashlet Setting Configuration in Sugar

After the installation of the wDrive package to your Sugar instance, users will find a new section on the Administration page: wDrive Settings. Click the Settings configuration link from the subpanel.

wDrive	
Configure Product Se	ttings and API Credentials
Settings	Set up API credentials, default root paths, starting paths for Dropbox, Google Drive, One Drive.

The Dropbox tab allows users to configure the settings of the <u>Dropbox Integration</u> <u>Dashlet</u>.

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Dropbox	Account Con	figuration					2
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Dropbox Ro	oot Path: 🕜						
			Select Root Path	Validate Roo	t Path		
Starting	Paths For Re	cord View					
Module					Default Sta	orting Path	0

- **Dropbox Application ID**: Users need to add in this field the App ID generated by the Dropbox app (search for the App Key field in your Dropbox app).
- **Dropbox Root Path**: this field allows users to set a default starting path for every Dropbox dashlet that will be created.

Users can create a Dropbox Root Path by using the "Select Root Path" button. Once pressed, this button will open a new dialog box. This dialog box contains all folders and files from the Dropbox application.

🔁 Dropbox 🛛 📥 Google Drive 🕋 One Drive					Save Setting
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Select Root Path Validate Ro	ot Path	Test Create Folder on Dropbox			
Starting Paths For Record View		Testtttt			
Module		Contacts			
Accourts	X *	Testing version 1.23		O Select Path Validate Path	
Contacts	x •	Testing%20version%201.23		Select Path Validate Path	
Opportunities	× *	AndreexTestFolder Test Accounts		O Select Path Validate Path	
		Test Accounts			
		Test Leads			
			Close Select		

To define the desired path, users must select a folder.

😂 Dropbox 🛛 🝐 Google Dri	ive 🛛 🗥 One Drive				Save Settings
Dropbox Account Configuration		1	Dropbox / AndreeaFolder / Share Office	e Fold /	
Dropbox Application ID:		Fier	ame Ø	Date Modified	
vhsajt0to67064o			Testing Sugar 8		
Dropbox Root Path:			Test 27Jul		
	Select Root Path Validate Root Path		READMETEST.md.txt	July 27th 2018 4:25:42 pm	
Starting Paths For Record View			README.md.txt	July 27th 2018 4:25:43 pm	+
Module			TestingAccountsMaintenanceDigestJobVersion1.07Suga.	, August 20th 2018 3:10:29 pm	
M Accounts	× •		Task.docx	August 20th 2018 3:10:30 pm	Select Path Validate Path
# Contacts	х •				Select Path Validate Path
Opportunities	ж.+				Select Path Validate Path
				Close Select	

The **Dropbox Root Path** can be validated by using the "**Validate Root Path**" button. After pressing the button, a dialog box that contains the selected path is opened if the chosen path is correct.

Dropbox Account Configuration			Dropbox / AndreeaFolder / Share	e Office Fold /
Dropbox Application ID:			ename	Date Modified
vhsajt0to67064o			Testing Sugar 8	
Dropbox Root Path:			Test 27Jul	
/AndreeaFolder/Share Office Folder Select Root Path Validate	e Root Path		READMETEST.md.txt	July 27th 2018 4:25:42 pm
Starting Paths For Record View			README.md.txt	July 27th 2018 4:25:43 pm
Module			TestingAccountsMaintenanceDigestJobVersion1.	07Suga August 20th 2018 3:10:29 pm
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When a wrong root path is added, the following message will be raised.



Module Configuration

This option allows users to customize their Dropbox dashlet for different modules and select their custom Default path.

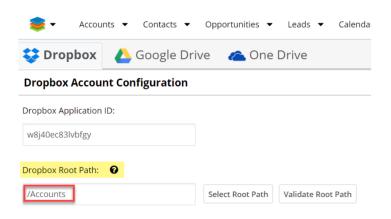
Users can configure their <u>Dropbox Integration Dashlet</u> depending on their needs:

• No Dropbox Root Path Defined

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• With a Dropbox Root Path Defined



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Accounts /	•	1 O
Filename 🗢 Date Modified	\$	
Test Drive 10.09.2		<u>ال</u> الا
Test Qa Folder		<u>ج</u> ة ح
Air Safety Inc		°o ▼
Test 1 Account Dr		<u>بن</u> الج
Max Holdings Ltd		<u>بن</u> الج

Starting Paths for Record View

There are two methods that users can choose from.

- **Module**: By using this method, users can define the module which will have a specific path.
- **Dropbox Default Path**: By using this method, users can define the desired path from Record View.

For example, on the **Accounts module**, the user needs to also select the name of the **Assigned User** for a specific account.

Users can add the desired field by using the (+) button.

Module	Default Starting Path 🛛 🕢	Insert Field Variable		
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		- U	😂 Drephen 🔥 Coogle Drive 👞 Dre Drive Brophen Account Configuration	
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				New Sources

Select your path by using the **Select Path** button and validate it by using the **Validate Path** button. starting Paths For Record View

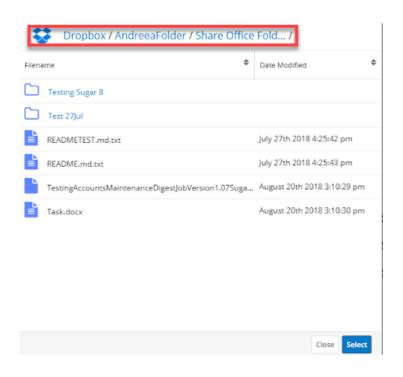
Мо	dule		Default Starting Path 🛛 🕢				
×	Accounts	× -	Accounts/\$name\$assigned_user_name	0	C	Select Path	Validate Path

Returning to the default path can be achieved by pressing the "Reset" button.

Note: Paths that contain variables cannot be validated.

Note: The final path is the concatenation between the Root Path set above and

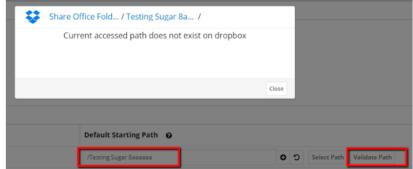
the **Default Path** set for the module.



Users can validate the default starting path for record view.

Module		Default Starting Path 😡	
Accounts	× -	Accounts/\$name	Select Path Validate Path

The following message is raised when a wrong path is added: "Current accessed path does not exist on Dropbox".



Dropbox Integration Dashlet

The Dropbox Integration Dashlet will display the paths, files and folders shared in the Dropbox application.

To use the integration, users must first sign in to Dropbox from the Dropbox

Integration dashlet.

Dashlet Options

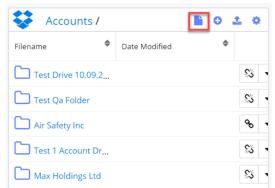
All Sugar modules where dashlets can be created can be integrated with Dropbox. After logging in, users can:

- View the contents of the shared dropbox folder.
- Path overflow: will appear if the path from folder to folder naming will overflow.

Accounts /	b O .	1 O
Filename 🗘	Date Modified	
Test Drive 10.09.2		<u>\$</u> 5
Test Qa Folder		<u>\$</u> 5
Air Safety Inc		œ
Test 1 Account Dr		<u>ڳ</u> خ
Max Holdings Ltd		<u>\$</u> 5

The Dropbox Integration Dashlet also allows users to perform several actions:

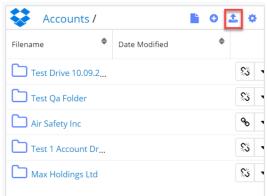
• Add a new signed document / Merge documents (for <u>wDocs</u> and <u>Sugar</u> <u>Connector to DocuSign</u> users)



• Create folder

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Filename	Date Modified	\$
Test Drive	10.09.2	<u>چې</u>
Test Qa Fo	lder	<u>ين</u> .
Air Safety I	nc	о о -
Test 1 Acco	ount Dr	<u>\$</u> 5 -
Max Holdin	ngs Ltd	<u>5</u> ,

• Upload files



• Configure the dashlet

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Test Qa Folder			<u>بة</u> .
Air Safety Inc			<i>о</i> о -
Test 1 Account Dr			<u>بة</u>
Max Holdings Ltd			<u>بة</u>

Users have the following configuration options:

- Edit: edit the Dropbox dashlet;
- **Refresh**: refresh the Dropbox dashlet;
- **Remove**: remove the Dropbox dashlet;
- Set As Starting Path: within a folder, users can set it as a new starting

path.

If users want to add a new Dropbox path apart from the ones configured from the **Administration** page, they can select the folder that will be used as a starting path in the **Dropbox Integration Dashlet**. By default, the dashlet will show the folder defined in Administration as the starting path for each module. If no path is defined for modules on record view, the parent folder will be shown on the Dropbox Integration Dashlet.

Users can also create custom paths on both List View and Record View.

🜻 -	Accounts Contacts Opportunities		Calendar 👻 Rep	oorts 🔻 Quotes	Documents	Search	۹ 💿 🔺 ۲
Accour	nts (20 of 21+)				Create »	Dropbox Integration	Create
Filter 🔻 🕻	Create Search by name				2 • 0 ^	Accounts /	■ 0 ± 0
-	Name ¢	City ¢	Billing Country	Phone 🗢	User 🗘	Test Drive 10.09 /]
□ ☆	Ana Popescu's Birthday				miha 💌 💌	Filename Test1QA	Date Modified
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□ ☆	Test QA wMaps	Santa Clara	US		Andr 👁 👻	Test 2 Folder	\$3
□ ☆	Anytime Air Support Inc	Salt Lake City	USA	(806) 130-2861	Sally 👁 👻	Test 3 Folder	September 13th 2019 10:12:2
	J.K.M. Corp (HA)	Santa Monica	USA	(633) 675-5469	Jim E 👁 🔻	testdoc2.txt	September 13th 2019 10:25:2 🐒
— н	Linnin sock (c. a)	June mond	60 GP 1	(000) 010-0400		testdoc2 - DOCUS	September 13th 2019 10:29:4 🔉

The new path will overwrite the path set in Administration.

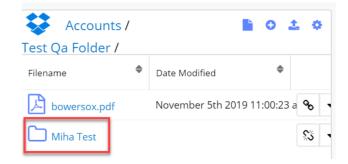
📚 🔹 🛛 Accounts 🔹 Contacts 👻 Opportunities 👻	Leads 👻 Calendar 👻	Reports 👻 Quotes	Documents	Search	۹ 💿 🔺 🕇
Ac Anytime Air Support Inc 🕸	< >	o ^o _o Test Accounts	Edit 🔹 >	Dropbox for Sugar	✓ ★ Create
Business Card wMaps Show More Calendar				Accounts /	■ 0 ± 0
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Business Center Name	Service Level				

Starting Paths For Record View					
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		Default Starting Path 🕢			

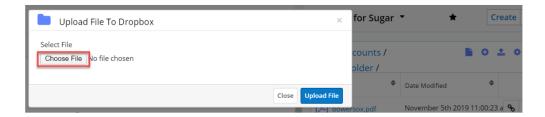
All other records will have the path defined in Administration.

📚 🗸 Accounts 👻 Contacts 👻 Opportunitie	rs ▼ Leads ▼ Calendar ▼	Reports 👻 Quotes 👻 Documents	5 •	Search	٩		4 -	•
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Website http://www.sectionvegan.co.uk	Industry Technology		l	Test Qa Folder / Filename	Date Modified		¢	
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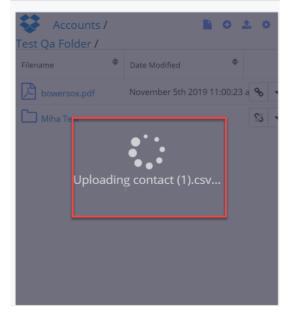
• **Create folder**: the button allows users to create new folders directly from the Dropbox Integration Dashlet.

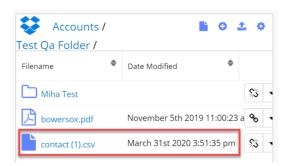


• Upload file: upload new file to Dropbox



Users can also upload files to the Dropbox Integration Dashlet by dragging and dropping them.





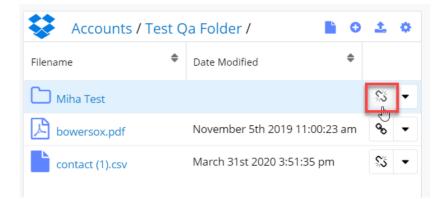
• **Logout**: Logout of the Dropbox dashlet. When a user logs out, the username does not clear. If you want to login with another user and try to connect, you will be logged back in with the same user. The Dropbox authentication flow is not allowing the user to connect to another account, unless the current logged user from **Dropbox Web Application** is logged out. If the sugar user wants to log into a different account through Sugar, first the logged account from the web must be logged out.

Dropbox Integrati	Propbox Integration Dashlet 🝷 🛛 🛧						
*			¢				
Co	nnect to Dropbox to get access	to the root folder					
	😆 Connect						
	😆 Connect						

File and Folder Options

The **Dropbox Integration Dashlet** offers users several actions they can perform for each folder.

• **Sharing options**: this action allows users to create a link with the folder that allows them to easily share it with other users.



Sharing Options - Miha Test	×
No link was created	Create Link
Enter the email address of the people you want to share the folder with	Share
	Close

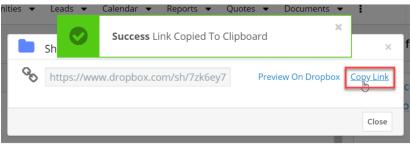
After creating the link, users have two methods available to share it.

	Sharing Options - Miha Test							
00	https://www.dropbox.com/sh/7zk6ey7	Preview On Dropbox Copy Link						
	3	रे Close						

1. **Preview On Dropbox**: this option will open the folder in the web application for Dropbox.



2. **Copy Link**: this option copies the Dropbox folder link to the user's clipboard.



Once the link for the folder is created, it can be shared with multiple users by adding the users' email addresses on the dialog and setting their rights, or by pasting the copied link.

	Sharing Options - Miha Test		×
00	https://www.dropbox.com/sh/7zk6ey7	Preview On Dropbox	Copy Link
Ente	r the email address of the people you want to sh	are the folder with	Share
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•	Miha Bulacu mbulacu@w-systems.com	Can Edit <mark>Can Edit</mark> Can View Remove Access	T
		-	Close

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	Moretti Business Coaching, Itd.		Only you		 Upload folder New folder Show deleted files
	Mr. Handyman		Only you		Show deleted files
	Test QA Account 🖈		2 members Andrees Constantia	Share	
	Test QA Account 2		Cristian Golopenta		

In the **Actions menu** of each folder, users have two options available:

• **Delete from Dropbox**: this option allows the user to delete a Dropbox folder directly from within the Dropbox dashboard.

Filename	\$	Date Modified		\$	Ac
Test Drive 10.0	9.2019				90
Test Qa Folder			Delete from Dropbox		
Air Safety Inc			Copy Link 1	Γο Clip	oboard
Test 1 Account	Drive				\$3
Max Holdings	Ltd				\$3

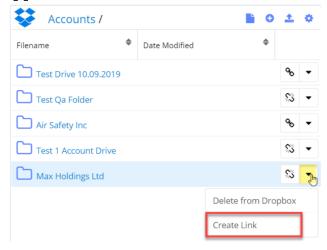
The following message is raised when users press the **Delete from Dropbox** action in the Actions menu. Delete folder?

		our Dropb	nared fold	er will sta	ay share	t QA Account d with other
						Close Delete
1 1 -	 			. 1	D	•

• **Copy Link to Clipboard**: This action allows users to copy the Dropbox folder link directly from the Actions menu.

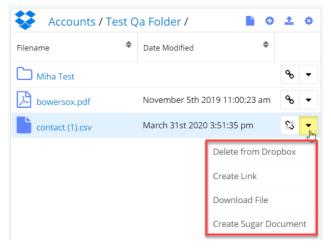
Accounts /				0	±	٠
Filename	\$	Date Modified		\$		
Test Drive 10.09.2019)				ø	Ŀ
Test Qa Folder			Delete from	Dro	pbox	
Air Safety Inc			Copy Link To	o Cli	pboar	d
Test 1 Account Drive			<u>ې</u> ن	•		
Max Holdings Ltd					<u>s</u>	•

In case the folder doesn't have a sharable link created, the **Create Link** action will appear in the Actions menu, instead of the **Copy Link to Clipboard** action.



Actions for Files

Folder files also have available a series of actions:



• **Quick Create Link** (for unlinked files). This action allows users to quickly create shareable links for Dropbox files.

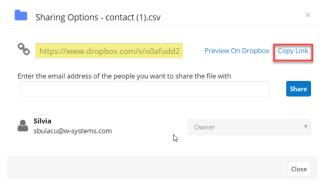
Sharing Options - contact (1).c	SV	×	box for Suga	r •	*		Crea	ate
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Silvia sbulacu@w-systems.com	Owner	v	ontact (1).csv		March 31st 2020 3:51:	35 pm		55
		Close						

After creating a sharable link, users have two options:

• Preview On Dropbox

	Sh	aring	Optio	ons -	cont	act (1).CSV				×		
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• **Copy Link**. This option allows users to copy the file link to their clipboards.

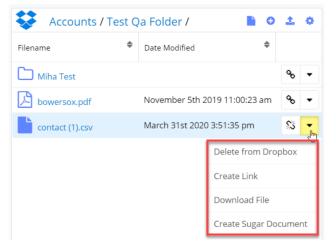


Sharing option	iuccess Link Copied To Cli	pboard	×
	ropbox.com/s/o0afudd2 of the people you want to sha	Preview On Dropbox	Copy Link
 Silvia 			Share
sbulacu@w-system	is.com	Owner	Y
			Close

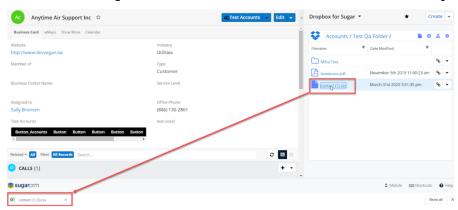
After creating the link, users can share the file with others. They can also set different types of access for each user.

×
dd2 Preview On Dropbox Copy Link
to share the file with
Can View 🔻
Can View V Remove Access

Files with created links have the following actions available in the Action menu:



- **Delete from Dropbox**: this action allows users to delete the file directly from within the Dropbox dashboard.
- **Copy Link to Clipboard**: this action allows users to copy the file's link to their clipboards directly from within the Dropbox dashboard.
- Download File: this action allows users to download a file directly from



Search Documents

within the Dropbox dashboard. This can be achieved by clicking on the file.

• **Create Sugar Document**: creates a Sugar Document with the attached file in the Sugar Documents module.

Document Name	My Favorites Search Cle	ar Advanced Search			
Delete 👻				(IC (1 - 2 of 2	2) ()))
Document Name	File Name	Source	Revision Date Expirat	tion Date 😄 User 😄 🛛 Date Cre	eated 🖕
🗉 😭 🧭 contact (1).csv	contact (1).csv	Sugar	04/01/2020 08:09am	04/01/20 08:09am	
🗉 🎡 🧭 test1.pdf	test1.pdf	Sugar	02/20/2020 12:00pm	Administrator 02/20/20 12:00pm	

The Sugar document will also be added to the **Documents subpanel** in **Record**

V. 🧃	🥺 DOC	CUMENTS (1)					+ -
		Name	\$ File	\$ Category	\$ Source	\$ Status	\$
	☆	contact (1).csv	contact (1).csv		Sugar		(A)

All documents in the **Documents subpanel** can be synced with Dropbox from their **Action menus**. O **DOCUMENTS** (1)

ction menus.	00 DOC	CUMENTS (1)											+	•
		Name	\$	File	\$	Category	\$	Source	¢	Status		\$		
	☆	contact (1).csv		contact (1).csv				Sugar					ø	₽ Ŀ
	٩										Unlink			
	CALLS (1) Sync								Sync to Dro	Sync to Dropbox				
	MEE MEE	TINGS (3)									Sync to Goo	gle Di	rive	
	Ts TAS	KS									Sync to One	e Drive	9	

From **the subpanel's Actions menu**, users can add all documents to the Dropbox dashboard by using the **Sync All Documents to Dropbox** action.

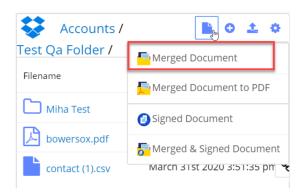
💿 doc	CUMENTS (1)					+ -
	Name	\$ File	\$ Category	\$ Source	¢	Link Existing Record
☆	contact (1).csv	contact (1).csv		Sugar		Sync All Documents To Dropbox
(Sync All Documents To Google Drive 🔸
CAL	LS (1)					Sync All Documents To One Drive

Dropbox Integrations with wDocs

Merge Options for Dropbox

The wDrive Dropbox Integration dashlet offers \underline{wDocs} users merge options straight from within their dashlet:

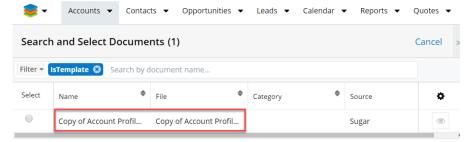
- <u>Merged Document</u>
- Merged Document to PDF



Note: For <u>Sugar Connector to DocuSign</u> users, the Signed Document and Merged & Signed Document are also available.

Merged Document

This action allows users to create a new document based on a template.



After clicking the **Merged Document** option, a new drawer with all the templates uploaded to Sugar will open. Select the template that you want to use.

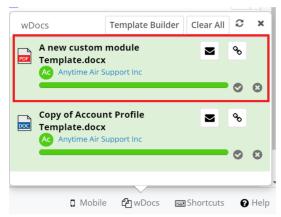
wDocs		Template Build	der	Clear Al	Ĵ	×
	y of Accour				ø	
	plate.docx					
	plate.docx Anytime Air S			_	• •	0

After the document merge is complete, users can find it in the <u>wDocs</u> footer widget, which will also be added to their **Dropbox dashlet**, and in the **Documents Subpanel** in Record View.

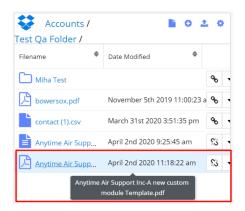
Accounts / Test Qa Folder /	≥ 0 ± 0
Filename 🜲	Date Modified
Miha Test	
bowersox.pdf	November 5th 2019 11:00:
contact (1).csv	March 31st 2020 3:51:35 p
Anytime Air Supp	April 2nd 2020 9:25:45 am

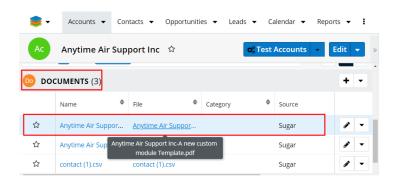
Merged Document to PDF

This option allows users to create new PDF documents based on a template.



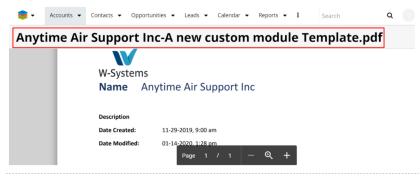
The merged PDF will appear in the <u>wDocs</u> footer widget, but also in the **Dropbox dashlet** and the **Documents subpanel** in Record View.





Preview Files

By clicking on any of the files in the <u>Dropbox dashlet</u>, users can preview their contents. This feature is only available for .pdf, .docx, .jpg, .png files.

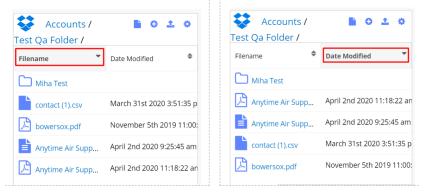


Files that have another format will be downloaded when clicking on them and this message will appear.

📚 👻 Accounts 👻	Contacts 👻	Opportunities 👻	Leads 👻	Calendar 👻	Reports 👻	ı	Search	۹
Anytime Air	r Suppo	rt Inc-Co	opy of	Accou	nt Prof	file T	emplat	e.docx
	You ma	y be offline o		uldn't previ ited conne		' downle	oading inste	ead.
	Connected ap;		-	ipps below to o	pen or edit this	item		

Sort Files and Folders

Users can sort files and folders by clicking on "**Filename**" or "**Date Modified**" from dashlet's header.



Dropbox File Revisions Management

When uploading files, the file revision management option is available. Instead of having duplicate files, a new revision of the file is created, if the file name already exists in the target location.

Name +		Modified •	Members -		
vame †		Modified ¥	Members •	:≣ ▼	Upload files
****	Miha Test		2 members		Dpload folder
٠	_Getting StaPaper.paper	23/3/2020 11:03	Only you		New folderNew shared folde
හ	Get Started wox Paper.url	18/3/2020 12:58	Only you		Request filesShow deleted file
PDF	Get Started wDropbox.pdf	18/3/2020 12:58	Only you		5 Rewind Dropbox

Dropbox Integration with Sugar Connector to DocuSign

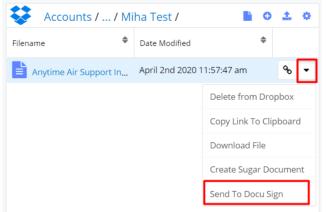
Documents stored in the Dropbox application can be signed from the <u>Dropbox</u> <u>Integration Dashlet</u> by using one of the following options:

- <u>Signed Document</u>
- Merged and Signed Document

Accounts / /	/	🖹 O 🛓 🗢
Miha Test /	_	
Filename 🗢	Da	FMerged Document to PDF
Anytime Air Supp Ap		Signed Document
		🚰 Merged & Signed Document

This functionality is only available to <u>Sugar Connector to DocuSign</u> users.

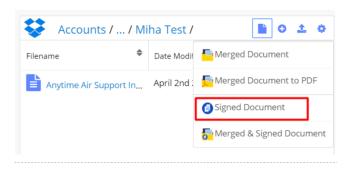
From the file's action menu, users can send documents for signature by using the **Send to DocuSign** action.



Note: This action is only available for .docx and .pdf files.

Signed Document

This function allows users to select a Sugar document and sign it.



After clicking the **Signed Document** option, the **Search and Select Documents** drawer will open. Select the desired document.

arci	h and Select Documents (7	7)		C	ancel
er 🕶	Create Search by document nam	e			
ect	Name 🔶	File \$	Category 🔶	Source 🗢	¢
	Anytime Air Support Inc-A ne	Anytime Air Support Inc-A ne		Sugar	۲
	Anytime Air Support Inc-A ne	Anytime Air Support Inc-A ne		Sugar	۲
	A new custom module Templ	A new custom module Templ		Sugar	۲
	Anytime Air Support Inc-Copy	Anytime Air Support Inc-Copy		Sugar	۲
	Copy of Account Profile Templ	Copy of Account Profile Templ		Sugar	۲
	contact (1).csv	contact (1).csv		Sugar	۲
	test1.pdf	test1.pdf		Sugar	

This will take the user to a **Select Signer Recipients** drawer. Select the Signer recipient(s).

😂 -	Accounts Contacts Opportunities	Leads Calendar Reports Quotes	▼ Documents ▼ Emails ▼ Campaigns ▼	I Search	a 💿 🎍 🕇
Select	signer recipients				Cancel Select
Selected: (4	() Ai© Gerardo Pl © Suzette Bu © Laquita Bo (3			Reset
	Name	Email Address	type 0	In Sugar O	0
	Anytime Air Support Inc	qa.hr.kid@example.cn	Signer	•	
	Gerardo Plante	beans.kid.section@example.co.jp	Signer		
۲	Suzette Burkes	qa.kid@example.cn	Signer	0	
	Laquita Boman	beans.phone@example.net	Signer		

Once the recipient was selected, the user is able to select the fields needed for signature and send the document to recipients.





M m

Μ

When the document is signed by all recipients, a confirmation email is sent and the document is added to the dashlet. Done! Select Finish to send the completed document.

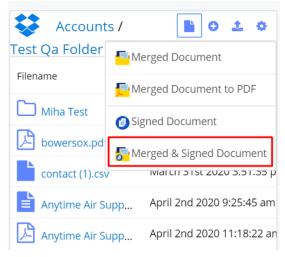


DocuSign

Your document has been completed.

Merged and Signed Documents

This option allows users to use two functions at the same time: \underline{wDocs}' Merge function and DocuSign's Sign function.



After clicking the **Merged & Signed Document** option, the **Search and Select Documents** drawer with documents will open. Select the desired document.

📚 -	Accounts 👻 Contae	cts 👻 Opportunities 👻	Leads 👻 Calenda	r 🔻 Repor	ts 🔻 🚦
Search	Search and Select Documents (2) Cancel				
Filter 🔻	IsTemplate 🙁 Search by (document name			
Select	Name 🜲	File 🗢	Category	Source	¢
	A new custom module	A new custom module		Sugar	۲
	Copy of Account Profil	Copy of Account Profil		Sugar	۲

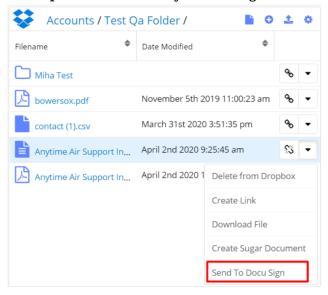
After selecting your template, the **Select Signer Recipients** drawer will open. Select the Signer recipient(s).

* •	Accounts Contacts	Opportunities Leads Calen	dar 🔻 Reports 💌 🗄	Search Q	• • •
Select	signer recipients				Cancel Select
elected: (4					
Anytime	Ai Suzette B	u Ø (Laquita 6२Ø)			Resi
	Name	Email Address	Туре	In Sugar	•
۲	Anytime Air Support Inc	qa.hr.kid@example.cn	Signer		
۲	Gerardo Plante	beans.kid.section@example.co.jp	Signer		
	Suzette Burkes	qa.kid@example.cn	Signer	•	
•	Laquita Boman	beans.phone@example.net	Signer		

The document will first be merged, then sent to signature. The process is similar to the <u>Signed Document</u> process.

Send to DocuSign

This option will send your merged document to DocuSign for signature.

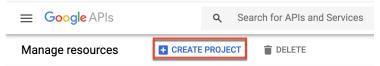


Google Drive Integration

- <u>Define Google Drive Settings</u>
- <u>Google Drive Integration Dashlet</u>
- <u>Starting Paths for Record View</u>
- <u>Create Google Docs Documents from a Template in the Google Drive</u> <u>Integration Dashlet</u>
- <u>Create Google Sheets Spreadsheets from a Template in the Google Drive</u> <u>Integration Dashlet</u>
- <u>Create Google Slide Presentation from a Template in the Google Drive</u> <u>Integration Dashlet</u>
- <u>Google Drive Revision Management</u>
- <u>Google Drive Integration with Sugar Connector to DocuSign</u>

To link a Google Drive application to Sugar, users first need to create a new **Google Drive application**. To do so, follow the steps below.

- 1. Navigate to the <u>Google Developers site</u> in your web browser and sign in using the Google account under which you would like to register the application.
- 2. Create a new project using one of the following methods:
 - Click the Create Project button, enter a project name of your choice (e.g., Sugar Google Drive Integration), and then click "Create".



 If you do not see the Create Project button, then click "Select a project" in the navigation bar. Click "New Project" in the Select a project window, enter a project name of your choice (e.g., Sugar Google Drive Integration), and then click "Create".

≡	≡ Google APIs Select a project				
API	APIs & Services	Arts & Services + ENABLE APIS AND SERVICES			
٠	Dashboard	Select a project NEW PROJECT			
出	Library	Search projects and folders			
07	Credentials				

- 3. Next, click the Google APIs logo in the navigation bar and the APIs & Services page will open with your newly created project selected. Click "Credentials" on the left tree menu.
- 4. On the Credentials page, click "+ Create Credentials" and then select "OAuth client ID" for the credential type.
- 5. Note: If this is your first API project, Google will prompt you to configure

the OAuth consent screen first. Users will see this screen when your application requests access to their private data. Click on the "Configure Consent Screen" option and then proceed to step 7.

			Q Search for APIs and Services		
API	APIs & Services	Credentials	+ CREATE CREDENTIALS	T DELETE	
< ☆ > ↓	Dashboard	Create credentials to ac	API key D Identifies your project using a simple API key to check quota and access		
ᇤ	Library	🛕 Remember t	OAuth client ID t Requests user consent so your app can access the user's data		
07	Credentials		Service account		

- 6. On the OAuth consent screen, select "Internal" as the user type then click "Create". On the following screen, enter the application name of your choice then click "Save". Now, click "Credentials" on the left tree menu, click "+ Create Credentials", and select "OAuth client ID". Note: Skip this step if you have already configured the OAuth consent screen.
- 7. Select "Web application" on the Create OAuth client ID screen then enter the Authorized Redirect URI: https://yoursugarinstance.com/custom/googledrive_authentication_redirect. html

← Cr	eate OAuth client ID
multiple p informatic	
Applicati Web app	
Learn mo	pre about OAuth client types
Name *	
SugarCF	RM OIDC
	e of your OAuth 2.0 client. This name is only used to identify the client in the and will not be shown to end users.
0	The domains of the URIs you add below will be automatically added to
U	your OAuth consent screen as authorized domains.
+ ADD	URI
	ed redirect URIs 🕜
For use wit	h requests from a web server
JRIs	
https://you	irsugarinstance.com/custom/googledrive_authentication_redirect.html
+ ADD	URI
CREATE	CANCEL
GREATE	

8. Click "Create" to generate your unique credentials. The Client ID and Client Secret information will display in a pop-up window. Record both of these values as they are required in the next section when <u>defining the</u> <u>Google Drive settings</u> for wDrive in Sugar.

Define Google Drive Settings

After installing the wDrive package to your Sugar instance, a new panel will be added to your Administration page: **wDrive Settings**.

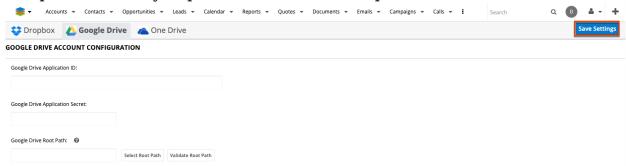
wDrive	
Configure Product Settings	and API Credentials
C ³ Settings	Set up API credentials, default root paths, starting paths for Dropbox, Google Drive, One Drive.

To define the **Google Drive Integration** settings:

1. Navigate to the Google Drive tab.

📚 🗸 Accounts 👻 Contacts 👻 Opportunities 👻 Leads 👻 Calendar 🔹					
😂 Dropbox 🔥 Google Drive \land One Drive					
Google Drive Account Configuration					
Google Drive Applicat	Google Drive Application ID:				
Google Drive Applicat	ion Secret:				
Google Drive Root Pat	th: 😧	Salact Poot Path	Validate Poot Pati		
Google Drive Root Pat	th: 0	Select Root Path	Validate Root Pati	n	

- 2. In the **Google Drive Application ID** field, add the Client ID generated by the Web Application.
- 3. In the **Google Drive Application Secret** field, add the Client secret generated by the Web Application.
- 4. Click the **Save Settings** button at the top of the page. This step must be completed before you proceed to the next step.



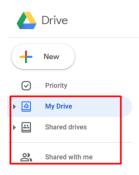
5. Add the default starting path for every Google Drive dashlet in the **Google Drive Root Path** field.

After configuring all these settings, users will be able to customize the Google Drive Dashlet, based on their needs.

1. No Google Drive Root Path Defined

Google Drive /	► 0 ± 0
Filename 🗘	Drive Type
My Drive	drive
DevTeam	team-drive
Marketing (Archive)	team-drive
Marketing	team-drive
C QA	team-drive
C Shared	team-drive
Uploads	team-drive
W-Systems	team-drive

In this case, both the **Shared Drives** and the **User's Drive (My Drive)** are visible.



In this case, paths containing the name of the **Shared Drives** or **My Drive** need to be defined. In case these paths are not created, the location of the newly-created files and folders will be unknown.

2. Google Drive Root Path Defined

To predefine Google Drive Root Paths, go to Administration and search for the Cloud Drive Integration panel.

• My Drive Path. Users need to navigate to the Cloud Drive Configuration section on the Administration page and select and Validate their Root Path to My Drive.

📚 🗸 Accounts	s	Opportunities 🔻	Leads 👻 Calenc
😵 Dropbox	스 Google Dr	ive 🗥 One	Drive
Google Drive Acco	ount Configurat	ion	
Google Drive Applicatio	n ID:		
74771787164-unj8js7h	11bd1015k8bd0nfpijk	kj823vm.apps.googleu	usercontent.com
Google Drive Applicatio	n Secret:		
RwKfqSPgvkLMROculO	QIfljSk		
Google Drive Root Path	: 0	ן	
/My Drive		Select Root Path	Validate Root Path

This will change the root path displayed in the **Google Drive Integration Dashlet** to My Drive.

My Drive /	📙 O 土 🔅
Filename 🗘	Date Modified
1Password Emerg	March 16th 2020 3:12:54 p
Copy of Account	January 16th 2020 2:10:21
Copy of Account	January 16th 2020 2:02:25
1Password Emerg	November 19th 2019 10:52
Getting started	October 21st 2019 10:33:4

• Shared Drives Path: From the Google Drive Tab on the Cloud Drive Configuration section on the Administration page, select which of the shared drives available there you want to configure as your Google Drive Integration dashlet's root path.

Google Drive /		
Filename	\$ Date Modified	\$
My Drive		
DevTeam		
Marketing (Archive)		
Marketing		
QA QA		
Shared		
D Uploads		
W-Systems		

Select and Validate your Root Path, and Save your new configuration.

Google Drive Root Path:	0	1	2
/Shared		Select Root Path	Validate Root Path

Now, the Google Drive Integration dashlet will have the same configuration.

Shared /	📔 O 土 O
Filename 🔶	Date Modified
Change Control	April 23rd 2019 11:43:16 pm 🗨
Office 365	April 4th 2018 12:51:20 am
Training Videos	March 15th 2018 10:06:45 pm 💌

When an invalid root path is added, the following message will be raised.

Close

Starting Paths for Record View

Users can define root paths for record view. To manage this, users need to configure the two available fields.

- **Module**: this dropdown field allows users to select the module to which the changes will apply in Record View.
- **Default Path**: here, users can define the desired format for a record in the selected module.

For example, on the **Accounts** module it is needed to display the name and the assigned user of an account.

The user can add the desired module and default path by clicking on (+) button:

Sta	rting Paths For Record View						+
M	odule		Default Starting Path 🛛 😧				
ж	Accounts	x -	Accounts/\$name	0 O	Select Path	Validate Path	

The format of the **Default Starting Path** can be configured by clicking on the (+)

button right next to the field. starting Paths For Record View

Module		Default Starting Path 🛛 🕢	
¥ Accounts	× -	Accounts/\$name	
Accounts	* *	Accounts/\$name	

Users can return to the default Path by pressing the **Reset** button.

Starting Paths For Record View						
Module		Default Starting Path 🛛 🥑				
* Accounts	× -	Accounts/\$name	0 0			

Note: The final path is the concatenation between the **Root Path** set above and the **Default Path** set for the module.

Note: Paths that contain variables cannot be validated. The following message will be raised when trying to validate paths that contain variables



Warning Path contains variables from module. Cannot perform validation

When users try to validate invalid root paths, the following message will be raised.

Close

32



Google Drive Integration Dashlet

The **Google Drive Integration Dashlet** offers users access to paths, files, and folders shared in the Google Drive application.

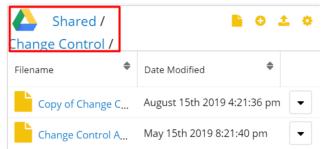
Users need to first add their Google Drive Integration Dashlet to Sugar's **Home View**, **List View** or **Record View**.

To manage this, sign in to Google Drive from the dashlet with the credentials used for the Google Drive web application.

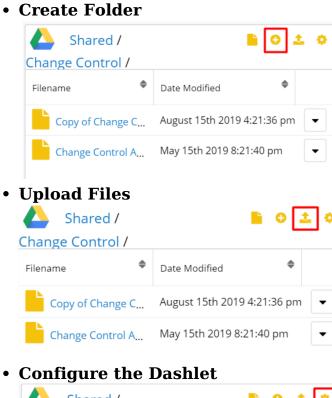
Dashlet Actions

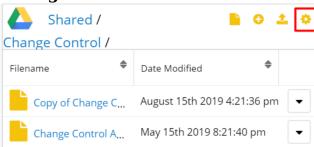
All Sugar modules with a dashlet integration can be used with the **Google Drive Integration Dashlet**. After logging in to your Google Drive account with the dashlet, users can perform the following actions from the dashlet.

- View contents of the shared Google Drive folders.
- Path overflow: this will appear if the path from folder to folder naming will overflow.



Actions available from the Google Drive Integration Dashlet:





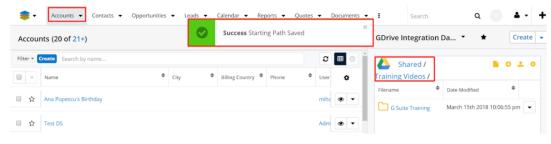
The configuration options for the Google Drive Integration dashlet are the following:

Shared /		🔓 O 🔔 🕫	>
Filename	Date Moc	Edit	
Change Control	April 23r	Refresh	
Office 365	April 4th	Remove	
Training Videos	March 1	Set As Starting Path	
		Create Folder	
		Upload File	
		Logout	

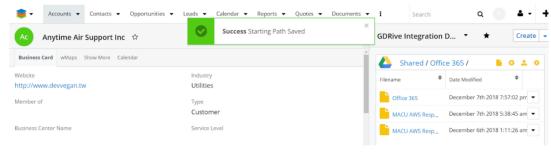
- Edit: allows users to edit the dashlet.
- **Refresh**: lets users refresh the dashlet.
- **Remove**: remove the Google Drive Integration Dashlet.

• Set as Starting Path: when within a folder, users can set that folder as a new starting patnts to add a custom starting path (if not added in **Administration**), they can select which folder will be the starting path for the Google Drive dashlet. By default, the dashlet will show the paths defined in Google Drive Settings on each module. The parent folder will be opened if no path is defined for modules on record view.

Custom paths can be defined on either List View or Record View.



The path created using the "Set As Starting Path" button will overwrite the path defined in Administration on record view for the selected record.



All the other records will preserve the path defined in Administration.

Ac Max Holdings Ltd 🕸		< > [Edit 👻 »	GDRive Integration	D The Create
Business Card wMaps Show More Calendar			Î	Shared /	► 0 ± 4
Website http://www.beanshr.edu	Industry Transportation		- 1	Filename	Date Modified
Member of	Type Customer		- 1	Change Control	April 23rd 2019 11:43:16 pm April 4th 2018 12:51:20 am
lusiness Center Name	Service Level			Training Videos	March 15th 2018 10:06:45 pm 💌

All paths created by using the "Set As Starting Path" action are saved in a new module called "wDrive Starting Path".

📚 -	Accounts 👻	• (Contacts 👻 Op	portunities 👻 L	eads 👻 wDrive	Starting Path 🔻	:
wDrive	Starting Pa	th (1)			С	reate
Filter 👻 Cr	eate Search b	oy na	me			3	III 0
-	Name	¢	LBL_CLOUD_S 🗢	Flex Relate	starting path	Date Modified	٥
□ ☆			Google Drive		/Marketing (Ar	04/08/2020 10	۰ .

Users can return to the paths defined in **Administration** only after removing the paths defined from the dashlet and stored in this module.

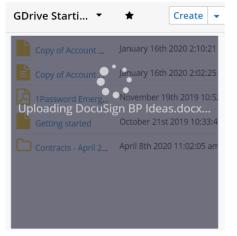
• **Create Folder**: This action enables users to create Google Drive folders directly from within the Dashlet.

Create Google Drive Folder		×	•	*	Create	e 🖣
Folder Name:						
Contracts - April 2020			Drive	/ 🗈 🤇	Ð 1	٥
c						
			¢	Date Modified		¢
1	Close Create F	older		March 16th 2	000 0.10	

• **Upload Files**: This action allows users to upload files directly from within Sugar.

Upload File To Google Drive	×	•	*	Create
Select File Choose File No file chosen		Drive	/	> _ ≎
Close	Upload File	\$	Date Modified	¢

Files can also be uploaded to the **Google Drive Integration Dashlet** by **dragging and dropping** them.



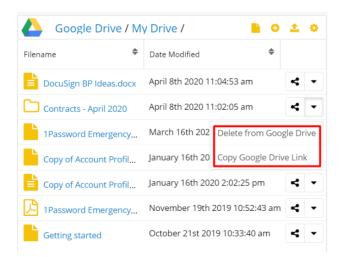
• Logout: allows users to log out of the Google Drive Integration Dashlet.

When a user logs out, the username does not clear from the dashboard. If you want to login with another user, you will be logged back in with the same user. The Google Drive authentication flow is not allowing the user to connect to another account, unless the current logged user from Google Drive Web Application is logged out. If the Sugar user wants to log in from a different account through Sugar, first the logged account from the web application must be logged out.

File and Folder Options

The Google Drive Integration Dashlet allows users to perform different actions from the Dashlet.

Folder Actions



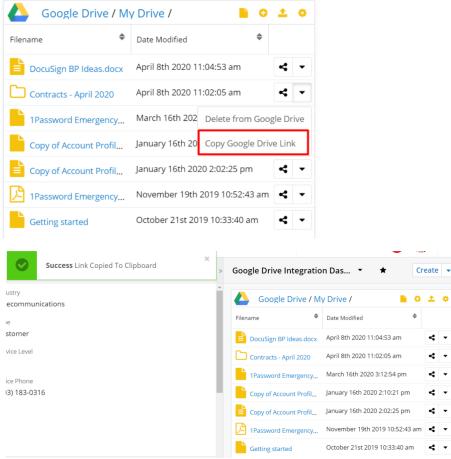
Delete from Google Drive

This action allows users to delete folders from the Google Drive Integration Dashlet and from the Google Drive Application.

Google Drive / M	y Drive / 📄 🙃 📩 🔅
Filename 🗘	Date Modified
DocuSign BP Ideas.docx	April 8th 2020 11:04:53 am < <
Contracts - April 2020	April 8th 2020 11:02:05 am
1Password Emergency	March 16th 202 Delete from Google Drive
Copy of Account Profil	January 16th 20 Copy Google Drive Link
Copy of Account Profil	January 16th 2020 2:02:25 pm <
1Password Emergency	November 19th 2019 10:52:43 am < 👻
Getting started	October 21st 2019 10:33:40 am < 💌

Copy Google Drive Link

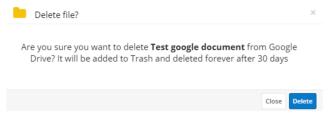
This action allows users to copy to their Clipboards the Google Drive Link of the folder.



File Actions

Delete From Google Drive

Allows users to delete the file from both the Google Drive Integration Dashlet and their Google Drive Applications. When pressed, the following message will be raised:



Copy Google Drive Link: When pressed, this action will copy the link of the Google Drive file to the user's clipboard.

Success Link Copied To Clipboard	>	Google Drive Integrat	tion Das 🝷 🔺	Create	e
stry communications	<u>^</u>	Google Drive /	My Drive /) ±	
	- 1	Filename	Date Modified		
ner	- 1	DocuSign BP Ideas.doc	x April 8th 2020 11:04:53 am	4	•
Level	- 1	Contracts - April 2020	April 8th 2020 11:02:05 am	4	•
	- 1	1Password Emergency,	March 16th 2020 3:12:54 pm	4	•
0316	- 1	Copy of Account Profil.	January 16th 2020 2:10:21 pm	4	•
		Copy of Account Profil,	January 16th 2020 2:02:25 pm	4	•
		1Password Emergency.	November 19th 2019 10:52:43 ar	n 🗲	•
		Getting started	October 21st 2019 10:33:40 am	4	

Download File

When pressed, this action allows users to download the file to their devices.

Create Sugar Document

This action allows users to create a new Sugar document with the attached file. The documents created with this action will be automatically saved in the Documents module and in the Documents Subpanel in Record View.

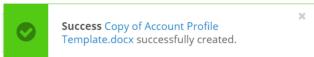
The Sugar document created with the Create Sugar Document action in the Documents Module:

📚 🗸 Accounts 👻 Contacts 👻 Opport	unities 👻 Leads 👻 Calendar 👻 Documents 👻
Note: To send record assignment notifications, an SMTF	e server must be configured in Email Settings.
Search Documents	
Document Name My	Favorites Search Clear Advanced Search
Delete 💌	
Document Name 👙 File Name	e Source \Leftrightarrow Category \Leftrightarrow Sub Category \Leftrightarrow Re
Copy of Account Profile Template.docx	Sugar 04. 08
Correction BP DocuSign BP DocuSign Ideas.docx	

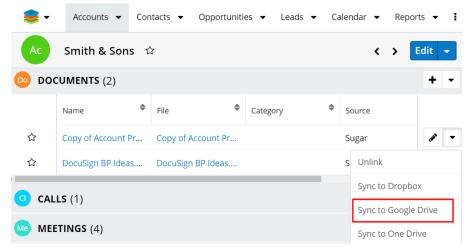
The Sugar document created with the Create Sugar Document action in the Documents Subpanel in Record View :

- ·	Accounts •	ionacts +	opportuniti	cs • Ecuu		aleridar +		cuments +
Ac	Smith & Sons 🌣 🔇 🔇							Edit 👻
Doc 💿	CUMENTS (2)							+ •
	Name	File	\$	Category	\$	Source		
☆	Copy of Account Pr.	. Copy of A	ccount Pr			Sugar		<i>i</i> -
☆	DocuSign BP Ideas	DocuSign	BP Ideas			Sugar		<i>#</i> -

If the document creation action was successful, the following message will be raised:



Note: Documents in the **Documents Subpanel** in **Record view** can be synced with the Google Drive Integration Dashlet. From a document's **Actions Menu**, choose **Sync to Google Drive**.



From the **Subpanel's Action Menu**, users can synchronize en-masse all documents available in the subpanel with the **Sync All Documents to Google Drive** action.

📚 -	Accounts 👻 Co	ntacts 👻 Opportuni	ties 🔻 Leads	s ▼ Calendar •	▼ Reports ▼ i			
Ac	Smith & Sons				C > Edit -			
Related	Related - All Filter All Records Search							
应 do	CUMENTS (2)				+ •			
	Name 🗢	File	Category	Link Existing Rec	cord			
☆	Copy of Account Pr	Copy of Account Pr Copy of Account Pr			ents To Dropbox			
☆	DocuSign BP Ideas DocuSign BP Ideas			Sync All Documents To Google Drive				
<				Sync All Docume	ents To One Drive			

Merge Options for the Google Drive Integration Dashlet

<u>wDocs</u> users can merge documents from templates from the Google Drive Integration Dashlet. Users have two merging options available from the dashlet:

- <u>Merged Document</u>
- Merged Document to PDF

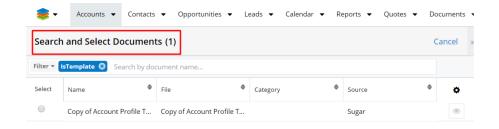
Google Drive / M	🖹 O ± O			
Filename 🗢	Date Modifie	Google Docs		
Contracts - April 2020	April 8th 202	Google Sheets		
DocuSign BP Ideas.docx	April 8th 202	👌 Google Slides 🛛 🕨		
1Password Emergency	March 16th			
Copy of Account Profil	January 16th	🔁 Merged Document to PDF		
Copy of Account Profil	January 16th 2020 2:02:25 pm			
1Password Emergency	November 19th 2019 10:52:43 am < 👻			
Getting started	October 21st 2019 10:33:40 am 🖌 🗸			

Merged Document

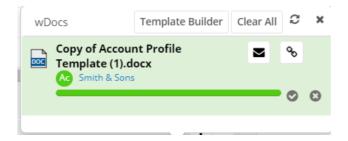
This option allows users to <u>create a new .docx document from a template</u>. To merge documents in **Record View** from the Google Drive Integration Dashlet, choose the **Merged Document** action from the dashlet header.

Google Drive	🖹 O 1 0	
My Drive /		Google Docs
Filename 🔶	Date	Google Sheets
Contracts - April 2	April	Google Slides
DocuSign BP Idea	April	Merged Document
1Password Emerg	Marc	Merged Document to PDF
Copy of Account	Janua	ary 16th 2020 2:10:21 pm 🔩

This will open the **Search and Select Documents** drawer with the available templates.



After selecting the template, the document will be added to the **Merge Queue**. After the merge is complete, the resulted document will be available in the <u>wDocs</u> <u>widget</u> available in your Sugar instance footer.

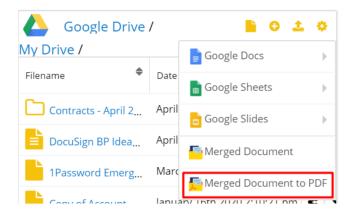


The merged document will also be available in the **Documents Subpanel** in **Record View** and in the **Google Drive Integration Dashlet**.

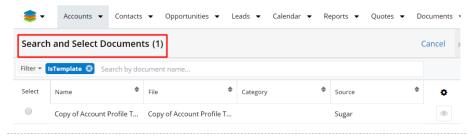
Ac	Smith & Sons 😪	ž			<	>	Edit	•
DC	OCUMENTS (3)						+	•
	Name 🔶	File 🗢	Category 🗢	Source	\$ Status			
☆	Smith & Sons-Copy	Smith & Sons-Copy		Sugar			ø	•
습	Copy of Account Pr	Copy of Account Pr		Sugar			ø	•
☆	DocuSign BP Ideas	DocuSign BP Ideas		Sugar				•

Merged Document to PDF

This action allows users to create new PDF documents based on a template. To merge documents to PDF files in **Record View** from the **Google Drive Integration Dashlet**, choose the Merged Document to PDF action from the dashlet header.



This will open the **Search and Select Documents** drawer with the available templates.



After selecting the template, the document will be added to the **Merge Queue**. After the merge is complete, the resulted document will be available in the <u>wDocs</u> <u>widget</u> available in your Sugar instance footer.



The merged document will also be available in the **Documents Subpanel** in **Record View** and in the **Google Drive Integration Dashlet**.

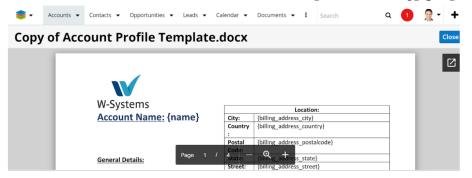
📚 -	Accounts 👻 Co	ontacts 🔻 Opportunit	ies 🔻 Leads 🔻 Ca	alendar 🖣	Reports	 Quote: 	s 🔻	Documents
Ac	Smith & Sons	습				<	>	Edit 👻
DO 💿	CUMENTS (4)							+ •
	Name 🔶	File 🔶	Category 🗢	Source	\$	Status		
☆	Smith & Sons-Copy	Smith & Sons-Copy		Sugar				<i>i</i> -
☆	Smith & Sons-Copy	Smith & Sons-Copy		Sugar				<i>₫</i> * ▼
☆	Copy of Account Pr	Copy of Account Pr		Sugar				<i>s</i> -
☆	DocuSign BP Ideas	DocuSign BP Ideas		Sugar				<i>s</i> -

Note: Before merging documents from the **Google Drive Integration Dashlet**, documents should be added to the **Documents Module** and saved as **Template**.

	✓ Contacts ▼ Opportunities ▼ Leads ▼	Calendar 👻 Documents	- I Search
Overview			
Source: (1)	Sugar 🔻		
File Name: *	Copy of Account Profile Template (1).docx	Status:	Active •
Document Name: *	Copy of Account Profile Template (1).c	Revision: *	1
Document Type:	v	Template?:	
Publish Date: *	04/08/2020	Category:	v
Expiration Date:		Sub Category:	

Preview Files

Users can preview the files in the **Google Drive Integration dashlet** by clicking on them. This feature is available for .pdf, .docx, .jpg, .png extensions.



Files that have another format will be open in Preview with the "**Couldn't Preview File**" message and **Download** button.

• 😂	Accounts 👻	Contacts 👻	Opportunities 🔻	Leads 🔻 Ca	alendar 🔻	Documents	• 1	Search	۹	1	<u></u> ₹• +
Docu	Sign B	P Ideas	s.docx								Close
		_									Ľ
		You ma	Couldn't preview file You may be offline or with limited connectivity. Try downloading instead.						L		
				<u>ل</u>	Download						

Sort Files and Folders

Users can sort files and folders in the **Google Drive Integration Dashlet** based on two variables: **Filename** and **Date Modified**.

Google Drive / M	y Drive / 📔 🙃 📩 🔅
Filename 🗘	Date Modified
Contracts - April 2020	April 8th 2020 11:25:45 am
DocuSign BP Ideas.docx	April 8th 2020 11:04:53 am < 👻
1Password Emergency	March 16th 2020 3:12:54 pm < 👻
Copy of Account Profil	January 16th 2020 2:10:21 pm 🛛 < 👻
Copy of Account Profil	January 16th 2020 2:02:25 pm 🛛 < 👻
1Password Emergency	November 19th 2019 10:52:43 am < 👻
Getting started	October 21st 2019 10:33:40 am < 🔻

Click on either of the options above to sort files and folders in the Google Drive Integration Dashlet.

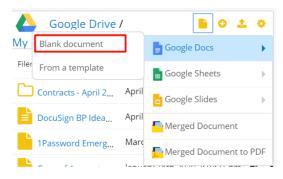
Create Google Docs Documents

This option is also available in the Google Drive Integration Dashlet header and it allows users to create documents using <u>blank documents</u> or <u>from templates</u> available in the Google Drive applications.

Google Drive / M	🖹 O ± O	
Filename 🗢	Date Modifie	Google Docs
Contracts - April 2020	April 8th 202	🖥 Google Sheets 🔋 🕨
DocuSign BP Ideas.docx	April 8th 202	吉 Google Slides 🛛 🕨
1Password Emergency	March 16th	Merged Document
Copy of Account Profil	January 16th	FMerged Document to PDF

Create Document from Blank Document

To create Google Drive Documents from blank documents, hover the cursor over the Google Docs option available in the Google Drive Integration Dashlet header and select "Blank Document".

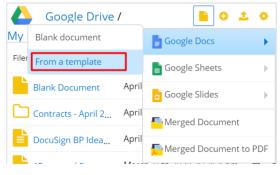


A new Google Docs document will open in your Google Drive web application. Once saved, the new document will be automatically saved to the **Google Drive Integration Dashlet**.

Google Drive	/ 🔒 🖸 🛨 🔅
My Drive /	
Filename 🔶	Date Modified
Blank Document	April 8th 2020 12:59:05 pm
Contracts - April 2	April 8th 2020 11:25:45 am
DocuSign BP Idea	April 8th 2020 11:04:53 am
1Password Emerg	March 16th 2020 3:12:54 pm <
Copy of Account	January 16th 2020 2:10:21 pm < 🗨
Copy of Account	January 16th 2020 2:02:25 pm <
1Password Emerg	November 19th 2019 10:52:43 <
Getting started	October 21st 2019 10:33:40 an < 🗨

Create Document from Google Docs Template

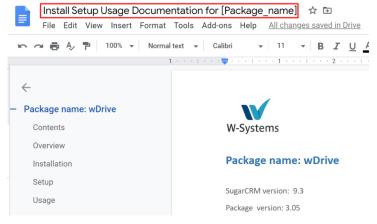
Users can create new Google Docs documents which will be automatically saved to their dashlets by using the **Merge from Template** action available in the Google Drive Integration Dashlet header.



Clicking this option will open the **Template Gallery** available in the Google Drive web application.

Template gallery						
W-Systems Genera	al					
Basics					📩 Submit templa	ite
Kanan Haran Haran Haran	W Systems		W-Systems			
Install Setup Usage Documentation for	Letterhead	:	Letterhead - Logo First Page Only	*	Letterhead - No Logo	*

Select and edit your template. The final version will be automatically saved in your **Google Drive Integration Dashlet** and the **Google Drive web application**.



Create Google Sheets Spreadsheets

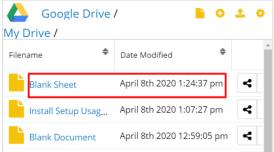
Users can create new Google Sheets spreadsheets which will be automatically saved to their dashlets by using the <u>Blank Document</u> or <u>From Template</u> actions available in the Google Drive Integration Dashlet header.

Create Google Sheets Spreadsheets from a Blank Spreadsheet

To create Google Sheets spreadsheets from blank documents, hover the cursor over the Google Sheets option available in the Google Drive Integration Dashlet header and select **Blank Spreadsheet**.



A new Google sheet will open in your Google Drive web application. Once saved, the new document will be automatically saved to the Google Drive Integration Dashlet.



Create Google Sheets Spreadsheets from a Template

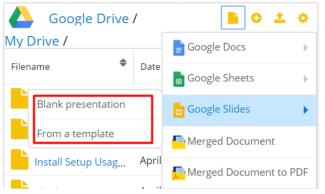
Users can create new Google Sheets spreadsheets which will be automatically saved to their dashlets by using the **From Template** action available in the Google Drive Integration Dashlet header.

Clicking this option will open the **Template Gallery** available in the Google Drive web application.

Select and edit your template. The final version will be automatically saved in your **Google Drive Integration Dashlet** and the **Google Drive web application**.

Create Google Slides

Users can create new Google Slides which will be automatically saved to their dashlets by using the <u>Blank Presentation</u> or the <u>From Template</u> actions available in the Google Drive Integration Dashlet header.

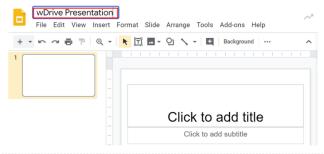


Create Google Slides from a Blank Presentation

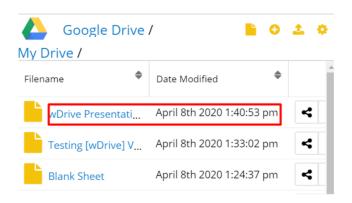
To create Google Slides from blank presentations, hover the cursor over the Google Slides option available in the Google Drive Integration Dashlet header and select Blank Presentation.



A new Google slide will open in your Google Drive web application.

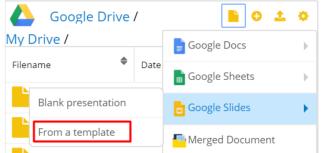


Once saved, the new presentation will be automatically saved to the Google Drive Integration Dashlet.

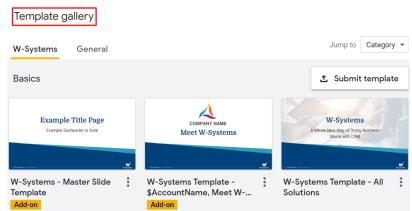


Create Google Slides from a Template

Users can create new Google Slides which will be automatically saved to their dashlets by using the From Template action available in the Google Drive Integration Dashlet header.



Clicking this option will open the Template Gallery available in the Google Drive web application.



Select and edit your template. The final version will be automatically saved in your Google Drive Integration Dashlet and the Google Drive web application.

Google Drive . My Drive /	/ 칠 😳	20
Filename 🗢	Date Modified	*
W-Systems Templ	April 8th 2020 1:47:48 pm	4
wDrive Presentati	April 8th 2020 1:40:53 pm	~
Testing [wDrive] V	April 8th 2020 1:33:02 pm	4

Google Drive File Revisions Management

When uploading files, the file revision management option is available. The Google Drive Integration Dashlet will only save the latest version of the files. Users can, however, see previous versions and potentially restore files to a previous version.

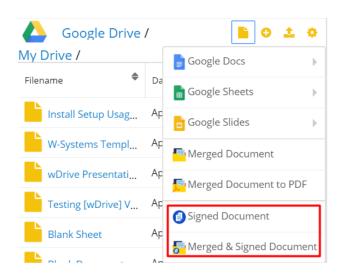
To verify file versions, go to your Google Drive web application and select the desired file. Right-click on it and choose **Manage Versions**.

	Drive	Q	Search D	rive			
+	New	My Drive 👻					
\bigtriangledown	Priority	Name	↑ 1Passw				
•	My Drive		-	\odot	Preview		
•	Shared drives	PDF	1Passw	<∱≯	Open with	>	
			Blank D	°[Share		
De	Shared with me	Ŧ	Blank Sl	Θ	Get shareable link		
S	Recent		-	+	Add to workspace	>	
☆	Starred	=	Copy of	A +	Add shortcut to Drive	?	
Π	Trash	w	Copy of	Þ	Move to		
				☆	Add to Starred		
	Storage	W	DocuSig	\oslash	Available offline		
	92.4 MB used	POF	Getting	0_	Rename		
			Install S	í	View details		
			motunio	Ð	Manage versions		
		Ŧ	Testing		Make a copy		
			W-Syste	()	Report abuse		
				$\mathbf{+}$	Download		
			- · ·				

Google Drive Integration with Sugar Connector to DocuSign

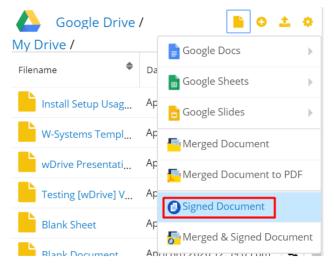
Sugar Connector to DocuSign users can send documents for signature straight from within the Google Drive Integration Dashlet. DocuSign users can sign or send for signature documents by using one of the two options available in the **Google Drive Integration header**:

- <u>Signed Document</u>
- Merged & Signed Document



Signed Document

This action allows users to select a document from the Documents module and send it for signature.



Clicking the **Signed Document** action will open the **Search and Select Documents** drawer from where users can select the document that will be signed or sent for signature.

-	Accounts Contacts	✓ Opportunities ✓ L	eads 🔻 Calendar 🔻 F	Reports 🔻 Quotes 👻	Documents	s 🗣			
Searc	Search and Select Documents (5)								
Filter 💌	Create Search by document	name							
Select	Name 🗢	File 🗢	Category 🗢	Source	÷ •				
	Smith & Sons-Copy of Ac	Smith & Sons-Copy of Ac		Sugar	۲				
	Smith & Sons-Copy of Ac	Smith & Sons-Copy of Ac		Sugar	۲				
	Copy of Account Profile T	Copy of Account Profile T		Sugar	۲				
	Copy of Account Profile T	Copy of Account Profile T		Sugar	۲				
	DocuSign BP Ideas.docx	DocuSign BP Ideas.docx		Sugar	۲				

Select the desired document. This will take the user to a new drawer where they can **Select signer recipients**. This drawer contains all email addresses from the selected account and its related records (Contacts, Leads etc.).

- 🥩	Accounts - Contacts - C	Dpportunities 👻 Leads 👻 Caler	ndar 🕶 Reports 👻 🖠 Se	earch Q 🚺	? - +			
Select signer recipients Cancel								
Smith & S	5) So 🏵 Isaura Pfarr 🔇 Piedad Ch	🕲 Piedad Fle 🕲 Horacio Pa 🕲			Reset			
	Name	Email Address	Туре 🕲	In Sugar 🖲	٥			
۲	Smith & Sons	vegan.vegan.hr@example.biz	Signer					
	Isaura Pfarr	kid98@example.it	Signer					
	Piedad Chaffin	info28@example.it	Signer					
•	Piedad Fleagle	hr92@example.info	Signer	•				

Once the recipient was selected, the users can select the fields needed for signature and send the document to recipients.

<	Smith & Sons-Copy of	Account Profile	Template (1).pdf		0	ACTIONS ¥	RECIPIE		SEND
•	Mihaela Bulacu	¥	± ⊂ [0	¢	114% 👻 🖵				
Q Se	arch Fields	×						🖉 Signature	
- 7	Standard Fields	Í	V		Sign 3			Required Field	
•	DS Initial		W-Systems Account Name: Smith &	City:	Location: Santa Monica			Formatting	~
8	Date Signed		Sons	Country: Postal	USA 61625			Data Label	~
6.				Code: State:	СА			Tooltip	~
- List	Ame			Street:	999 Baker Way			Location	*

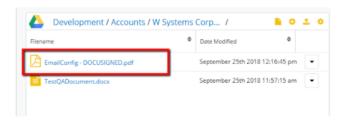
When the document is signed by all recipients, a confirmation email is sent and the document is added in dashlet.

DocuSign

Mihaela Bula	icu sent you a document to revie	w and sign.
ſ		
	REVIEW DOCUMENT	
L		1
Mihaela Bulacu		

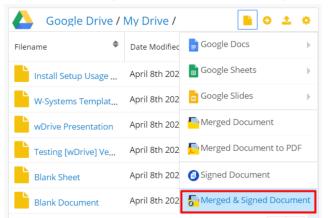
mbulacu@w-systems.com

Mihaela Bulacu,

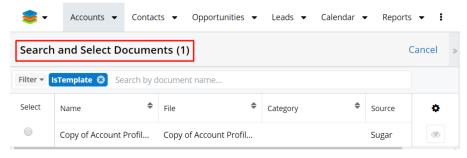


Merged & Signed Document

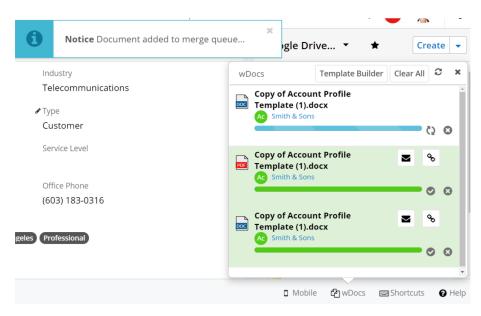
This action allows users to first merge documents with \underline{wDocs} and then sign and send the merged documents for signature.



Clicking on this action will open the **Search and Select Documents** drawer where users can select the template to merge their documents.



After selecting the document, it will be added to the Merge Queue.



When the merge process is done the DocuSign function opens the **Select signer recipients** drawer with recipients and then the document can be signed.

📚 -	Accounts - Contacts - C	Opportunities 👻 Leads 👻 Calen	dar 👻 Reports 👻 📔 Sea	arch Q 🚺	<u>-</u> +
Select	signer recipients			Cancel	Select
Selected: (5	5) 50 🏵 Isaura Pfarr 🕄 Piedad Ch (8 Piedad Fle 8 Horacio Pa 8			Reset
	Name	Email Address	Туре 🕲	In Sugar	٥
•	Smith & Sons	vegan.vegan.hr@example.biz	Signer		
۲	Isaura Pfarr	kid98@example.it	Signer		
۲	Piedad Chaffin	info28@example.it	Signer		
•	Piedad Fleagle	hr92@example.info	Signer		

After selecting the recipients, a new DocuSign browser tab will open that allows the user to set the signature fields.



Once set, the user can send the recipients the merged document for signature. Recipients will receive a notification via email.

DocuSign
Mihaela Bulacu sent you a document to review and sign.
Mihaela Bulacu mbulacu@w-systems.com
Mihaela Bulacu,
Please DocuSign Smith & Sons-Copy of Account Profile Template (1).docx

Thank You, Mihaela Bulacu

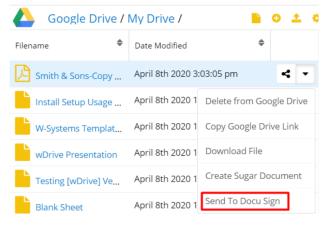
The document can be reviewed and signed by clicking on the **Review Document**

button in the email.	Done! Select Finish to send the completed document.		FINISH OTHER ACTIO
	Q Q ±, 🖬	DZ ⑦	
	DocuSign Envelope ID: DZF7E27C-E308-46EA-94AF-BCED47E7738A Milaula Bulau 70577CH7953A446	www.docusign.com	
	Account Name: Smith & City:	Location: Santa Monica	
	Count		
	Sons Posta	l 61625	
	Code:		
	State		
	Stree	t: 999 Baker Way	

After all recipients have signed the document, it will automatically be added to the Google Drive Integration dashlet.

Send to DocuSign

This option is available in the Google Drive Integration Dashlet, on each file's action menu.



Once the action is selected, the **Select signer recipients** drawer is open. To complete the **Send to DocuSign** signature process, follow the steps from the

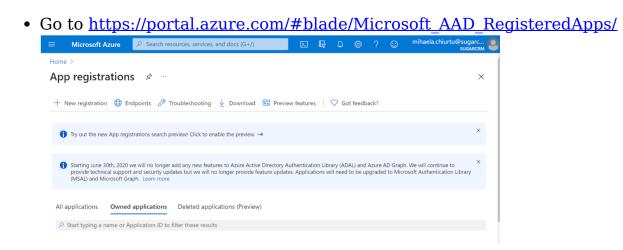
Signed Document section above.

📚 -	Accounts - Contacts - C	Opportunities 🕶 Leads 👻 Calen	ndar 👻 Reports 👻 🚦 Sea	arch Q 6	? - +
Select	signer recipients			Cance	Select
Selected: (6	,	8 Piedad Ch 8 Piedad Fle 8 H	Horacio Pa 🛛		Reset
	Name	Email Address	Туре 🔁	In Sugar 🖲	۰
	Smith & Sons	vegan.vegan.hr@example.biz	Signer		
۲	Mihaela Bulacu	mbulacu@w-systems.com	Signer		
۲	Isaura Pfarr	kid98@example.it	Signer		
	Piedad Chaffin	info28@example.it	Signer		

OneDrive Integration

- <u>Define OneDrive Settings</u>
- **OneDrive Integration Dashlet**
- **OneDrive Integration with wDocs**
- <u>Revision Management</u>
- OneDrive Integration with Sugar Connector to DocuSign

To link a **OneDrive application** to their Sugar instance, users have to follow the steps below.



• Register a new application. Press the **New Registration** button.

Register an application
* Name
The user-facing display name for this application (this can be changed later).
OneDriveApp ✓
Supported account types
Who can use this application or access this API?
 Accounts in this organizational directory only (SugarCRM only - Single tenant)
O Accounts in any organizational directory (Any Azure AD directory - Multitenant)
Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)
Personal Microsoft accounts only
Help me choose
Redirect URI (optional)
We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.
Web v issystems_0407_mihaela/custom/onedrive_authentication_redirect.htrv
By proceeding, you agree to the Microsoft Platform Policies 🗗
Register

- Name. Fill in this field with the desired name for the app.
- **Supported account types**. Accounts in any organizational directory (Any Azure AD directory: Multi Tenant) and personal Microsoft accounts (e.g. Skype, Xbox).
- **Redirect URL** (optional). Add your Sugar instance URL followed by /custom/onedrive_authentication_redirect.html

Note: Each Sugar instance should have its own application created.

Define OneDrive Settings

After installing the **wDrive** package to a Sugar Instance, a new section will be added on the **Administration** page: the **wDrive Settings** section. To define your settings for the **OneDrive application** access the **Settings Configuration** link.



This will take you to another page where you can configure the **OneDrive Dashlet**. Select the **OneDrive tab** on the new page.

🜻 • Accounts • Contacts •	Opportunities •	Leads 🕶 Caler	ar • Reports •	I s
😌 Dropbox 🛛 💧 Google Dr	ive 🙈 One	Drive		
One Drive Account Configuration	n			
One Drive Application ID:				
126d5c81-ed78-403b-a419-da1c5a83ea3b				
One Drive Application Secret:				
y184dpq5]j7P:G:LCTR/p8:su-oZ_68P				
One Drive Root Path: 0				
	Select Root Path	Validate Root Path		

Here, users can configure the following:

- **OneDrive Application ID**: Users need to add the Client ID generated by the Web Application
- **OneDrive Application Secret**: Users need to add the Client secret key generated after pressing the "Generate Password" button.
- **OneDrive root path**: Users need to add the default starting path for every OneDrive dashlet that will be created.

The OneDrive Root Path can be selected by using the **Select Root Path** button. After pressing on this button, a new dialog box containing all folders and files from OneDrive application is opened.

😵 Dropbox 🛛 🔼 Google Dri	ive 🗥 One	Drive	One Drive /		
One Drive Account Configuration	l i	 `	Che Drive /		
Dne Drive Application ID:		File	name	•	Date Modified \$
126d5c81-ed78-403b-a419-da1c5a83ea3b		C	08.04.2020		April 8th 2020 2:03:16 pm
		C	19.03		March 20th 2020 9:01:53 am
ne Drive Application Secret:		C	31.03		April 1st 2020 11:52:27 am
y1B4dpq5]j7P:G:LcTR/pB.:u-oZ_6BP		C) AA		March 7th 2019 11:17:31 am
ne Drive Root Path: 🔞		C	Accounts		August 16th 2018 3:01:13 pm
	Select Root Path	Valid:	Contacts		August 16th 2018 3:18:15 pm
tarting Paths For Record View		C	Customers		September 19th 2018 4:12:09 pm
Aodule		C	Folder 1		April 8th 2020 2:44:36 pm
nodule		C	Leads		March 7th 2019 1:50:39 pm
		C	QA Test Folder		August 20th 2018 3:11:30 pm
		C	Silvia		April 8th 2020 1:44:14 pm
		· · ·	•		

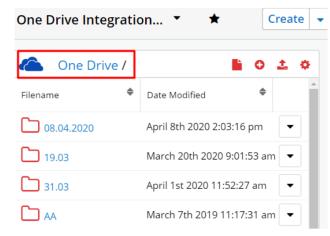
Choose the Folder that will be defined as the root path in the OneDrive Integration Dashlet and press **Select**.

Validate the chosen root path by clicking on the **Validate Root Path** button. A new dialog box will open with contents of the root path selected if the root path is correct. Click **Close**.

😂 Dropbox 🛛 🛆 Google Driv	e 🌰 One		One Drive / Accounts /		
One Drive Account Configuration			-		
One Drive Application ID:		Filen	ame	Ť	Date Modified
126d5c81-ed78-403b-a419-da1c5a83ea3b			Cumberland Trails Inc		August 16th 2018 3:05:30 pm
			JTJ Medical Supply		September 13th 2018 3:27:47
One Drive Application Secret:			Test 11.11		November 11th 2019 12:01:11
y1B4dpq5]j7P:G:LcTR/pB.:u-oZ_6BP			Test 1ABC		October 25th 2019 2:07:58 pm
One Drive Root Path: 🛛 😧			Test Account 5sept		September 5th 2018 4:09:39 p
/Accounts	Select Root Path	Valida 🛅	Test Account Andreea		March 25th 2019 12:31:02 pm
Starting Paths For Record View			Test Account Cloud		September 25th 2018 10:51:16
Module			Test Account New		September 7th 2018 10:06:32
mourie			Test Account New 7Sept		September 7th 2018 11:01:19
			Test Account QA		March 5th 2019 3:21:26 pm
			Test Folder 19Sept		September 19th 2018 3:44:30

Users can add or not root paths to the OneDrive Integration Dashlet, depending on their needs.

1. The OneDrive Dashlet without a Root Path Defined



2. The OneDrive Dashlet with a Root Path Defined

📚 🔹 Accounts 👻 Contacts 👻	Opportunities 🕶 Leads 🕶 Calendar 🗣
😂 Dropbox 🛛 💧 Google Driv	/e 🏠 One Drive
One Drive Account Configuration	
One Drive Application ID:	
126d5c81-ed78-403b-a419-da1c5a83ea3b	
One Drive Application Secret:	
y1B4dpq5]j7P:G:LcTR/pB.:u-oZ_6BP	
One Drive Root Path: 🔞	
/Accounts	Select Root Path Validate Root Path

One Drive Integratio	on • • Create •
\land Accounts /	≥ 0 <u>±</u> ¢
Filename 🗢	Date Modified
Cumberland Trail	August 16th 2018 3:05:30 pm 💌
JTJ Medical Supply	September 13th 2018 3:27:47 💌
Test 11.11	November 11th 2019 12:01:1 💌

Starting Path for Record View

To set paths for record view on different modules, go to the **Administration** page, and search for the **Define CloudDrive Settings** panel. Click on the **Cloud Drive Configuration** link and go to the **OneDrive tab** on the configuration page. In the half bottom of the page, you will find the **Starting Paths For Record View** section, split into two columns: **Module** and **Starting Path**.

Starting Paths For Record View	•
Module	Default Starting Path 😡
X Select Module	Select Path Validate Path

• **Module**: is a dropdown field where users can choose the module for which the starting path will be defined.

	٩
Contacts	A
Accounts	
Opportunities	
Cases	
Notes	
Calls	
Emails	•
Select Module	-

• **Starting Path**: is a field that will be auto-populated with the path once the module is selected.

For example, for the **Accounts** module, in Record View, the name of the assigned user will be displayed by default. Users can configure which path will be added by clicking on the (+) button next to the **Starting Path** field. This will provide them with a number of options depending on which they can set the path.

One Drive Application Secret:				Q
y1B4dpq5]j7P:G:LcTR/pB.:u-oZ_6BP			Annual Revenue	
One Drive Root Path: 🔞			Assigned to	
/Accounts	Select Root Path Validate Root R	Path	Billing City	
Starting Paths For Record View			Billing Country	+
Module		Default Starting Path	Billing Postal Code Billing State	
* Accounts	× -	/Accounts\$annual_revenue		Select Path Validate Path
* Opportunities	× -	/AA	Annual Revenue	Select Path Validate Path

After the option is selected, press on the **Select Path** button and choose the desired OneDrive Default path for the module of choice. Click on **Validate Path** to validate it. If the chosen path is correct, a dialog box with the path's contents will open. Click **Close**.

On the **Accounts module**, in Record View, the **OneDrive Integration Dashlet** will have the path defined above.

Test Account An /		
🗢 Test Account Andreea	Date Modified	\$
Test Account And	March 25th 2019 12:	33:09 pm 💌

/Test Account Andreea

0 C Select Path Validate Path

To reset the dashlet to the default path, click on the **Reset** button.

Starting Paths For Rec	ord View		+
Module		Default Starting Path 🛛 🕢	Reset Path To Default
* Accounts	× •	/Test Account Andreea	Select Path Valid

Note: Paths that contain variables cannot be validated.

X Accou

OneDrive Integration Dashlet

With the OneDrive Integration Dashlet, users have access to paths, folders and files shared in the OneDrive application. To use the OneDrive Integration Dashlet, sign in from the dashlet using the OneDrive account credentials used for the web application.

Dashlet Options

After successfully logging in into the OneDrive Integration dashlet, users will be able to do the following:

- View contents of the shared folders.
- Path overflow: It will appear if the path from folder to folder naming will overflow.

Users will also be able to perform the following actions.

B	0	<u>t</u> .	٥
Date Modified			Â
August 16th 2018 3:05:30 pm		•	
September 13th 2018 3:27:47 pr	۱	•	
November 11th 2019 12:01:11 pr	n	•	
October 25th 2019 2:07:58 pm		•	
	August 16th 2018 3:05:30 pm September 13th 2018 3:27:47 pm November 11th 2019 12:01:11 pr	August 16th 2018 3:05:30 pm September 13th 2018 3:27:47 pm November 11th 2019 12:01:11 pm	August 16th 2018 3:05:30 pm • September 13th 2018 3:27:47 pm • November 11th 2019 12:01:11 pm •

- **Create folder**: this action is available in the Dashlet header and it allows users to quickly create a folder directly from within the dashlet.
- **Upload file**: This action allows users to quickly upload files directly from within the OneDrive Integration dashlet.
- **Configure**: Users can quickly configure their dashlet options.

The available configuration options are the following:

Counts /		🗎 O 土 🗘
Filename 🗘	Date Modified	Edit
Cumberland Trails I	August 16th 2018 3	Refresh
JTJ Medical Supply	September 13th 20	Remove
Test 11.11	November 11th 20	Set As Starting Path
Test 1ABC	October 25th 2019	Create Folder
Test Account 5sept	September 5th 201	Upload File
Test Account Andre	March 25th 2019 1	Logout

- Edit: this option allows users to edit their dashlet.
- **Refresh**: this option allows users to refresh the dashlet.
- **Remove**: this option allows users to remove the dashlet.
- Set As Starting Path: this option allows users to set a new starting path, different from the one defined on the Administration page. By default, the paths defined in the OneDrive Settings section for each module will appear. The parent folder will be opened if no path is defined for modules on record view. A custom path can be created either on both List View and Record View.
- Create Folder: allows users to create folders. This option is similar to the

Create Folder option available in the dashlet header.

Upload File: allows users to upload files. This option is similar to the Upload File option available in the dashlet header. The user is able to upload several files at once, by dragging them to the OneDrive dashlet.

• **Logout**: this action will log the user out of the OneDrive Integration Dashlet. When a user logs out, the username does not clear from the dashlet. If you want to login with different credentials, you will be logged back in with the same user. The One Drive authentication flow is not allowing users to connect to a different account, unless the current logged user from OneDrive Web Application is logged out. If the Sugar user wants to log into a different account through Sugar, they must first log out of the OneDrive web application.

Note: The path defined using the Set As Starting Path option will overwrite the path defined in the Administration page for the selected record.

			•				-
Success Starting Path Saved		One Drive Integration I	Dashlet. 🝷	*	Cre	ate	•
ustry ecommunications	^	Accounts / Cumb	oerland Trai /		0	<u>t</u>	¢
e	L	Filename 🗢	Date Modified		\$		
stomer		Tests.docx	August 16th 2018 3	:05:39 pm		•	
vice Level							

All the other records in the module will have the path defined in **Administration**. All the paths created by using the **Set As Starting Path** option will be visible in the **wDrive Starting Path** module.

📚 🗸 Accounts		pportunities 🔻	Leads 👻 Calenda	r 🔻 Reports 👻	Quotes 👻	wDrive Startin
wDrive Starting F	Path (2)					Create
Filter - Create Searc	h by name				í í	. 🖩 0
Name	LBL_CLOUD_SE	Flex Relate	starting path	Date Modified 🔻	Date Created	¢
	One Drive	Smith & Sons	/Cumberland T	04/09/2020 11:	04/09/2020 11:	• •
	Google Drive		/Marketing (Arc	04/08/2020 10:	04/08/2020 10:	• •

Once all records are removed from the **wDrive Starting Path** module, all records in record view will have the starting path defined in **Administration**.

File and Folder Actions

OneDrive Integration Dashlet users can perform different actions for the files and folders shared in the dashlet.

Folder Actions

Users have two available actions in each folder's action menu that can be performed for OneDrive Integration Dashlet folders.

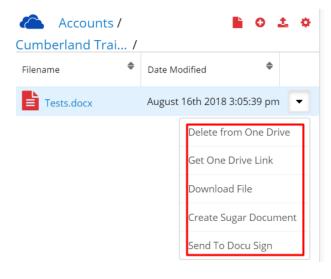
Accounts /	. (0 <u>t</u> 0
Filename 🔶	Date Modified	¢ ^
Cumberland Trail	August 16th 2018 3:05:30	0 pm 🔻
JTJ Medical Supply	Septe Delete from One	Drive
Test 11.11	Nove Get One Drive Lin	ık

- **Delete from OneDrive**: This allows users to delete folders directly from within the OneDrive dashlet. The folders deleted using this action will also be deleted from the OneDrive web and desktop applications.
- **Copy OneDrive Link**: This action allows users to copy the folder's OneDrive link to their clipboard. It also allows users to preview the contents of the folder in the OneDrive web application.

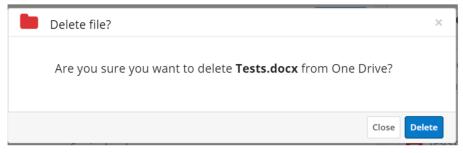
	One Drive Sharing Link		×					
00	https://1wsystems-my.sharepoint.com	Preview On One Drive	Copy Link					
			Close					
				Files > Accounts > Cumberland Trails Inc	1			
				Name Name Instantion	August 16, 2010	Co Tran	101.00	Mang P Stand

File Actions

In the Actions Menu of each file shared in the OneDrive Sugar application are available multiple actions



• **Delete from OneDrive**: This action allows users to delete files directly from their OneDrive dashlet. The following message will be raised when the action is pressed.



• **Get OneDrive Link**: This action allows users to copy the folder's OneDrive link to their clipboard. It also allows users to preview the contents of the folder in the OneDrive web application.

	One Drive Sharing Link		×
Q0	https://1wsystems-my.sharepoint.com	Preview On One Drive	Copy Link
			Close

• **Download File**: this action allows users to download the shared file to their devices. Files that don't allow preview can be downloaded by clicking on them.

Ac Smith & Sons 🕸		< > Edit -	> One Drive Integrat	ion Dashlet. 🔹 🔺	Create 💌
Website http://www.phoneim.it	Industry Telecommunications		Accounts / C	Cumberland Trai /	0 1 0
Member of	Туре		Filename	Date Modified	*
Business Center Name	Customer Service Level		Tests.docx	August 16th 2018 3:05:39 p	m 💌
Assigned to Sarah Smith	Office Phone (603) 183-0316				
Tags Africa Application California Florida Los Angeles Professional					
Show more					
Related - All Filter All Records Search		2 🖩 0			
DOCUMENTS (5 of 6+)		+ -			
Name File Category Category	y 🗢 Source 🗢 Sta	atus 🗢			
😂 sugarcrm				🛾 Mobile 🛛 wDocs 🔤 She	ortcuts 🕜 Help
Tests.docx					Show all

• **Create Sugar Document**: This action allows users to create Sugar documents with the file. The documents created by using this action in Record View will be automatically saved to the **Documents Module**.



Search Documents My Favorites Search Clear Advanced Search Document Name 🗆 🔻 Delete 👻 Document Name 🛛 🔤 File Name Source $\[e]{\]}$ Category $\[e]{\]}$ Sub Category **Revision Date** JTJ Medical Supply UpCurve Cloud MSA(R).docx JTJ Medical Supply UpCurve Cloud MSA(R).docx 04/09/2020 0 Sugar 9:13am Smith & Sons-Copy of Account Profile Smith & Sons-Copy of Account Profile 04/08/2020 Sugar 0 Template (1) -DOCUSIGNED.pdf Template (1) -DOCUSIGNED.pdf 12.09pm

Documents created with this action will also be saved to the **Documents** Subpanel in Record View: S. Accounts - Contacts - Opportunities - Leads - Calendar - Reports - Quotes - Docum

ew:	📚 -	Accounts 👻	Contacts	 Opportunitie 	es 🔻 Leads 👻 Ca	alendar 🔻	Reports •	 Quotes 	•	Docum	ients
	Ac	Smith & Sons	☆					<	>	Edit	-
	💿 DOG	CUMENTS (5 of 6	+)							+	•
		Name	♦ File	¢	Category 🗢	Source	\$	Status			
	☆	JTJ Medical Supply .	JTJ M	ledical Supply		Sugar				ø	•
	☆	Smith & Sons-Copy	Smit	h & Sons-Copy		Sugar				ø	•
	☆	Smith & Sons-Copy	Smit	h & Sons-Copy		Sugar				ø	•
	☆	Smith & Sons-Copy	Smit	h & Sons-Copy		Sugar				ø	•
	☆	Smith & Sons-Copy	Smit	h & Sons-Copy		Sugar				ø	•

• **Send to DocuSign**: Sugar Connector to DocuSign users have the option to sign and send for signature documents directly from within the OneDrive Integration Dashlet.

All documents in the **Documents subpanel** in Record View can be synced with the OneDrive Integration Dashlet from the action menu of each document.

Ac	Smith & Sons ាវ	2			< > Edit -
) DC	OCUMENTS (5 of 6+)				+ -
	Name 🗘	File 🔶	Category 🗘	Source 🔶	Status
☆	Tests.docx	Tests.docx		Sugar	<i>d</i> -
☆	JTJ Medical Supply	JTJ Medical Supply		Sugar	Unlink
☆	Smith & Sons-Copy	Smith & Sons-Copy		Sugar	Sync to Dropbox
☆	Smith & Sons-Copy	Smith & Sons-Copy		Sugar	Sync to Google Drive
☆	Smith & Sons-Copy	Smith & Sons-Copy		Sugar	Sync to One Drive
					Add to DocuSign
More do	ocuments	Send with DocuSign			
СА	ALLS (1)				Quick Send with DocuSign

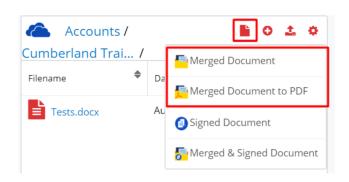
Users also have the option to mass synchronize all the documents in the **Documents subpanel** with the OneDrive Integration Dashlet with the **Sync All Documents to OneDrive** action from the **subpanel's Action Menu**.

Ac	Smith & Sons ್	7		< > Edit -	
00 DOG	CUMENTS (5 of 6+)				+ -
	Name 🗢	File 🔷	Category 🗢	Source	Link Existing Record
☆	Tests.docx	Tests.docx		Sugar	Sync All Documents To Dropbox
☆	JTJ Medical Supply	JTJ Medical Supply		Sugar	Sync All Documents To Google Drive
☆	Smith & Sons-Copy	Smith & Sons-Copy		Sugar	Sync All Documents To One Drive

OneDrive Integration with wDocs

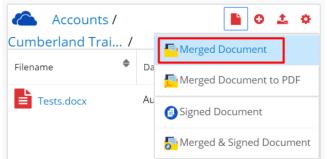
<u>wDocs</u> users can merge documents to Microsoft Word documents or PDF files from a template, directly from within the OneDrive Integration Dashlet. Users have two merging options available from the dashlet:

- <u>Merged Document</u>
- Merged Document to PDF



Merged Document

This action allows users to merge record data with a template, resulting in a new word document.



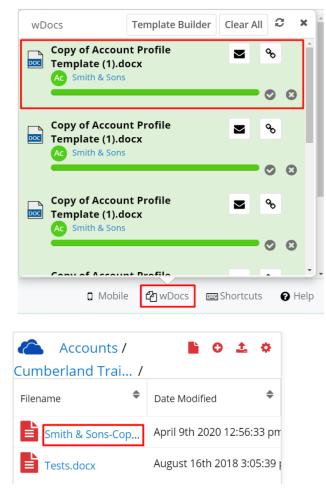
Once the **Merged Document** action is pressed, the **Search and Select Documents** drawer will open.

- 🨻	Accounts 👻	Contacts	s 🕶 Op	oportunities 🝷	Leads 👻	Calendar 🗣	Report	ts 🔻 🚦			
Search and Select Documents (1) Cancel »											
Filter 👻	Filter • IsTemplate 🙁 Search by document name										
Select	Name	\$	File	\$	Category	\$	Source	٠			
	Copy of Account	Profil	Copy of Account Profil Sugar					۲			

Select the template where you want the merge to occur. Once you do so, the document will be added to the Merge Queue. A

× Notice Document added to merge queue...

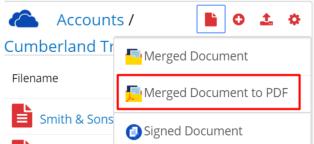
After the document is successfully merged, it will be available in the <u>wDocs widget</u> in Sugar's footer, on the **OneDrive Integration Dashlet** and in the **Document** subpanel in Record View.



-	Accounts - Co	ntacts 👻 Opportun	itie	s 🕶 Leads 💌	Ca	lendar 🔻	Report	s 🔻	:
Ac	Smith & Sons	☆					E	dit	- *
	CUMENTS (5 of 6+)							+	•
	Name 🗘	File		Category	¢	Source			
☆	Smith & Sons-Copy	Smith & Sons-Copy				Sugar		S	•
☆	Tests.docx	Tests.docx				Sugar		\$	•
☆	JTJ Medical Supply	JTJ Medical Supply				Sugar		6 1	•
☆	Smith & Sons-Copy	Smith & Sons-Copy				Sugar		*	•

Merged Document to PDF

This action allows users to merge record data with templates to PDF files.



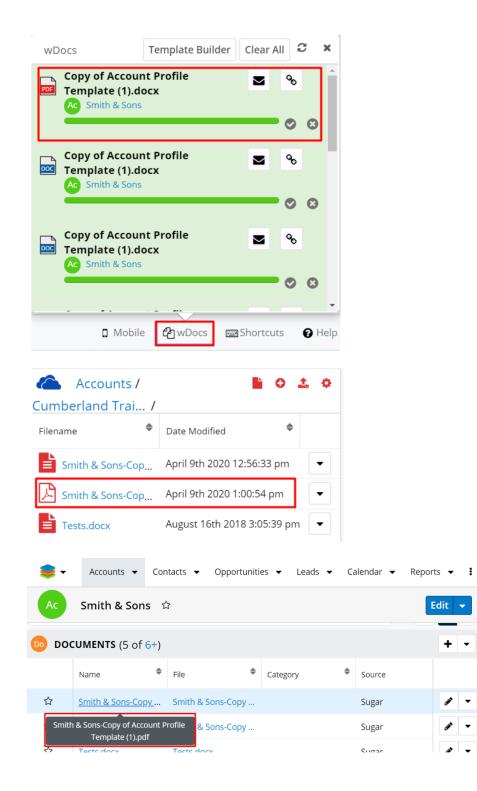
Once the Merged Document to PDF action is pressed, the Search and Select Documents drawer will open.

- 🥪	Accounts 🔻	Contacts 🔻	Opportunities 🔻	Leads 🔻	Calendar 👻	Reports 🗨	· !
Search	n and Select D	ocuments (1)				Car	ncel »
Filter 🔻	IsTemplate 😮 S	earch by document	name				
Select	Name	🗢 File	\$	Category	\$	Source	٥
	Copy of Account	t Profil Copy of	Account Profil		-	Sugar	۲

Select the template where you want the merge to occur. Once you do so, the document will be added to the Merge Queue. A

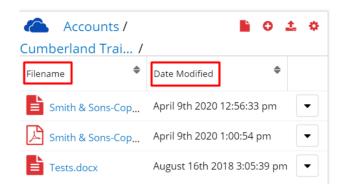
 \simeq Notice Document added to merge queue...

After the document is successfully merged, it will be available in the <u>wDocs widget</u> in Sugar's footer, on the **OneDrive Integration Dashlet** and in the **Document** subpanel in Record View.



Sort Files and Folders

Users can sort files by Filename or Date Modified. To sort your files or folders, click on either of the previous options.



OneDrive Revision Management

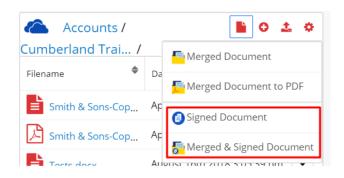
When uploading files, users can follow the version revisions for each file. Go to the OneDrive web application in the desired folder and right-click on a file in the folder. Choose Details and in the right-side panel will be the last date when the file was modified.

						Distance Section Smith & Section 2018	ons-Copy of Account Profi
Files	> Accounts >	Cumberland Tra	ails Inc 🧖				More details
	🗋 Name 🗸		Modified $ \smallsetminus $	Modified By $ \smallsetminus $	File Size \smallsetminus	Туре	
	Tests.docx		August 16, 2018	Qa Team	16.4 KB	DOCX File Modified	
0	😰 Šmith & So	ons-Copy of	3 hours ago	Qa Team	221 KB	3 hours ago	
	🔒 🥍 Smith & So	ons-Copy of Accou	3 hours ago	Qa Team	202 KB	Size 221 KB	

OneDrive Integration with Sugar Connector to DocuSign

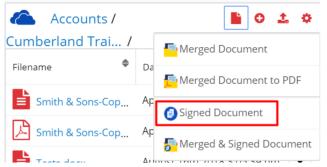
Sugar Connector to DocuSign users can sign and send signature documents directly from within the OneDrive Integration Dashlet. The OneDrive Integration Dashlet allows users to manage this through the following Actions available in the dashlet's header:

- <u>Signed Document</u>
- <u>Merged & Signed Document</u>



Signed Document

This action allows users to select documents from the **Documents module**, sign and send those for signature. Click on the Signed Document action in the dashlet header action menu.



After selecting the **Signed Document** from the menu, the **Search and Search and Select Documents** drawer will open. Choose the document you want to sign and send it for signature.

-	Accounts 👻 Contacts 👻	Opportunities 👻 Leads 👻	Calendar 🔻 R	teports 🔻	Quotes 🔻 Documen	its 🔻 E	mails 🔻				
Search	Search and Select Documents (11)										
	Create Search by document nam		_	\$		\$					
Select	Name 👻	File 🗣	Category	•	Source	~	٠				
	Smith & Sons-Copy of Accoun	Smith & Sons-Copy of Accoun			Sugar		۲				
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	Tests.docx	Tests.docx			Sugar		۲				

After selecting the document, the **Select Signer Recipients** drawer will open. Select which contact associated with the account you want to sign the document and press **Select**.

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	Name	Email Address	Туре	In Sugar 🚯	٥
•	Smith & Sons	vegan.vegan.hr@example.biz	Signer		
	Mihaela Bulacu	mbulacu@w-systems.com	Signer		
۲	Isaura Pfarr	kid98@example.it	Signer		
	Piedad Chaffin	info28@example.it	Signer	0	

A preview of the document will open in a new browser tab. Here users need to set the placement of the recipients' signature. After setting the signature placement, press **Send**.

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After the recipient signs the document and a confirmation email is sent on the user's email address, the signed document will appear in the **OneDrive Integration Dashlet**, in the **Documents subpanel**, and in the **Documents module**.

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Merged and Signed Document

This action allows users to use two functions at the same time, as long as they are

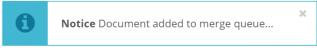
both <u>wDocs</u> and <u>Sugar Connector to DocuSign</u> users. This function allows users to first Merge their documents with wDocs and then sign and send documents for signature with Sugar Connector to DocuSign.

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Once the **Merged & Signed Document** option is selected, the **Search and Select Documents** drawer is open.

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After selecting the template where the merge to occur from, it is added to the **Merge Queue**.



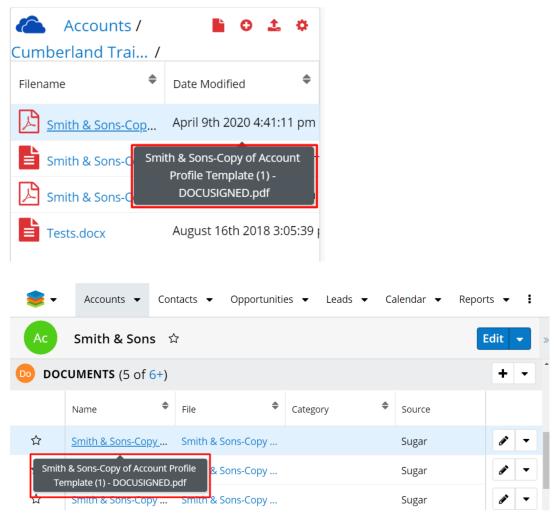
Once the merge is successful, the merged document will appear in the <u>wDocs</u> <u>widget</u> in the footer and the **Select signer recipients drawer** is automatically opened.

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Smith & Sons	vegan.vegan.hr@example.biz	Signer		
Mihaela Bulacu	mbulacu@w-systems.com	Signer		
	signer recipients) Name Smith & Sone	signer recipients)) Name Smith & Spnc vegan.vegan.hr@example.biz	Signer recipients Imail Address Name Email Address Smith & Sons vegan.vegan.hr@example.biz Signer	Signer recipients Image: Im

Select the desired signer recipient. A preview of the document will open in a new browser tab. Here users need to set the placement of the recipients' signature. After setting the signature placement, press **Send**.

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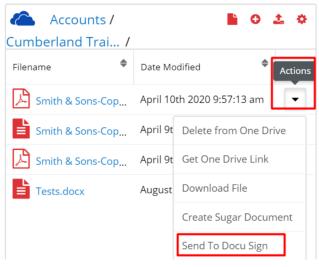
After the recipient signs the document and a confirmation email is sent on the user's email address, the signed document will appear in the **OneDrive Integration Dashlet**, in the **Documents subpanel**, and in the **Documents module**.





Send to DocuSign

Users can send documents for signature directly from each document's action menu. To proceed so, choose the **Send to DocuSign** action from a **file's action menu** in the dashlet.



After pressing this action tailist of recipients is opened the signer recipient. the placement of the recipients' signature. After setting the signature placement, press **Send**.



After the recipient signs the document and a confirmation email is sent on the user's email address, the signed document will appear in the **OneDrive Integration Dashlet**, in the **Documents subpanel**, and in the **Documents module**.

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