
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 [W-Systems Product Installation Guide](#).

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 [W-Systems Supported Platforms](#) 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 [wDocs](#) 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 co-workers, 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 [wDocs](#), 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 [wDocs](#).

Using wDrive

- [Dropbox Integration with Sugar](#)
- [Google Drive Integration with Sugar](#)
- [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.

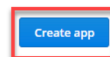
Dropbox Integration with Sugar

- [Dropbox Dashlet Setting Configuration in Sugar](#)
- [Dropbox Dashlet Integration](#)
- [Dropbox Integration with wDocs](#)
- [Preview Files](#)
- [Sort Files and Folders](#)
- [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.




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

Create a new app on the DBX Platform

🔔 Miha Bulacu

1. Choose an API

<p>Dropbox API</p> <p>For apps that need to access files in Dropbox. Learn more</p>		<p>Dropbox Business API</p> <p>For apps that need access to Dropbox Business team info. Learn more</p>	
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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

[Learn more about access types](#)

<p><input type="radio"/> App folder – Access to a single folder created specifically for your app.</p>
<p><input checked="" type="radio"/> Full Dropbox – Access to all files and folders in a user's Dropbox.</p>

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.

TestMiha22

Settings | Branding | Analytics

Status: Development Apply for production

Development users: Only you Enable additional users

Permission type: Full Dropbox

App key: 1akbch0rdyqumz

App secret: Show

OAuth 2

Redirect URIs

Add

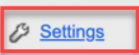
Allow implicit grant: Allow

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.

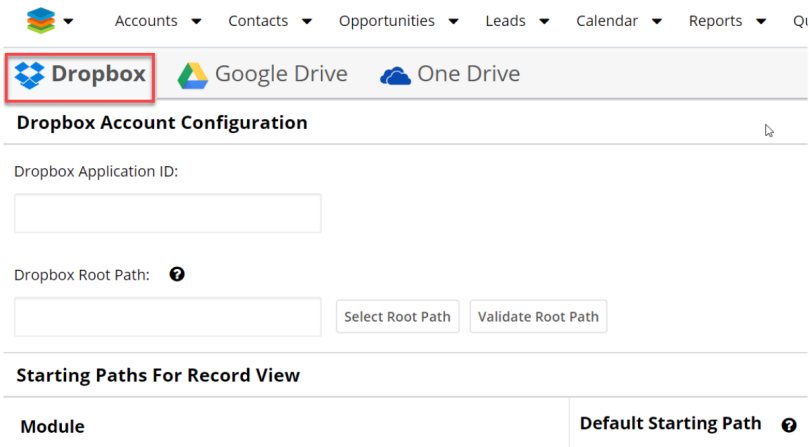
wDrive

Configure Product Settings and API Credentials

 [Settings](#)

Set up API credentials, default root paths, starting paths for Dropbox, Google Drive, One Drive.

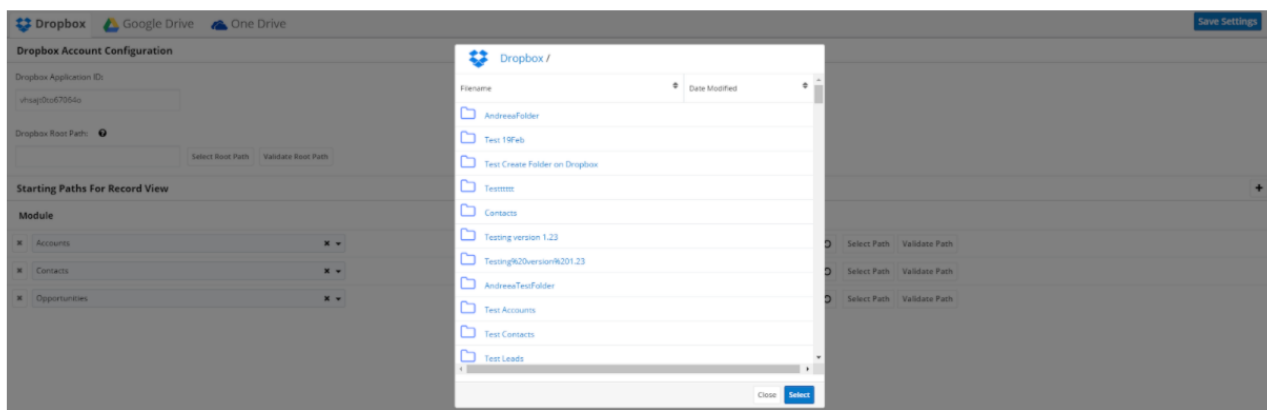
The Dropbox tab allows users to configure the settings of the [Dropbox Integration Dashlet](#).



The screenshot shows the 'Dropbox Account Configuration' section of a dashboard. At the top, there are navigation tabs for 'Dropbox', 'Google Drive', and 'One Drive', with 'Dropbox' selected. Below the tabs, the 'Dropbox Account Configuration' section contains two main input fields: 'Dropbox Application ID' and 'Dropbox Root Path'. The 'Dropbox Root Path' field has a help icon and two buttons: 'Select Root Path' and 'Validate Root Path'. Below this is the 'Starting Paths For Record View' section, which features a table with columns for 'Module' and 'Default Starting Path'. The table is currently empty.

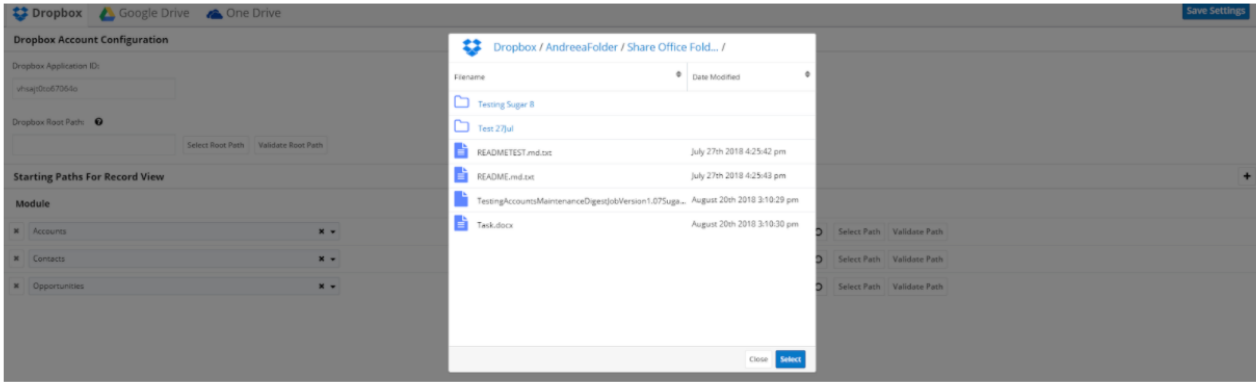
- **Dropbox Application ID:** Users need to add in this field the App ID generated by the Dropbox app (search for the App Key field in your Dropbox app).
- **Dropbox Root Path:** this field allows users to set a default starting path for every Dropbox dashlet that will be created.

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.

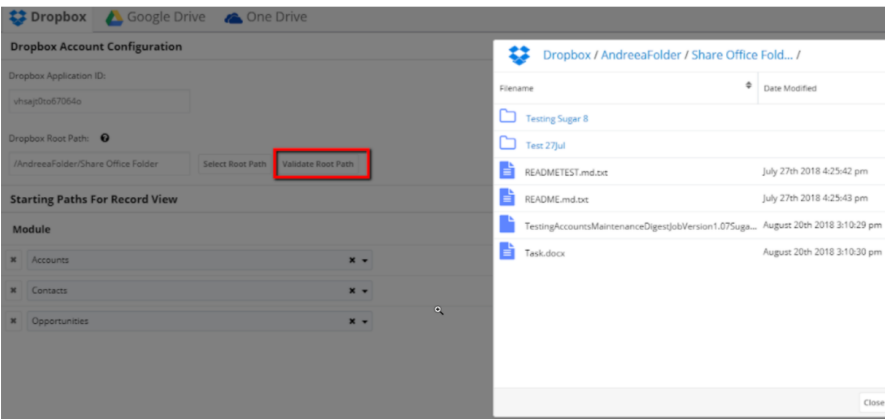


The screenshot shows a 'Dropbox /' dialog box overlaid on the configuration page. The dialog box displays a list of files and folders from a Dropbox account. The list includes folders like 'AndreaFolder', 'Test 19Feb', 'Test Create Folder on Dropbox', 'Testconts', 'Contacts', 'Testing version 1.23', 'Testing@2bversion@201.23', 'AndreaTestFolder', 'Test Accounts', 'Test Contacts', and 'Test Leads'. At the bottom of the dialog box, there are 'Close' and 'Select' buttons.

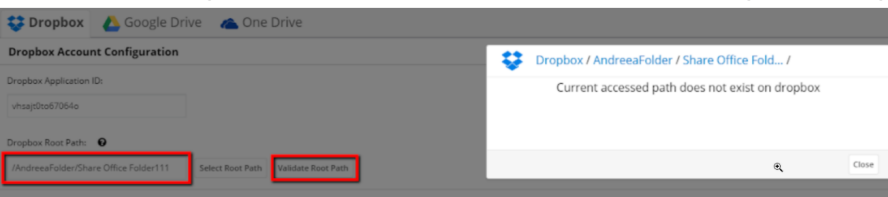
To define the desired path, users must select a folder.



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.



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 [Dropbox Integration Dashlet](#) depending on their needs:

- **No Dropbox Root Path Defined**

Accounts Contacts Opportunities Leads Calend

Dropbox Google Drive One Drive

Dropbox Account Configuration

Dropbox Application ID:

Dropbox Root Path: ⓘ

Select Root Path Validate Root Path

Dropbox Integration ★ Create

Dropbox /

Filename	Date Modified	
test		🔗
Accounts		🔗
Opportunities		🔗
ImiPlacSaratelele		🔗
Test Folder Accou...		🔗
Test Accounts		🔗
Test QA 2 Folder		🔗
test12		🔗
test QQ - Silvia		🔗

• **With a Dropbox Root Path Defined**

Accounts Contacts Opportunities Leads Calenda

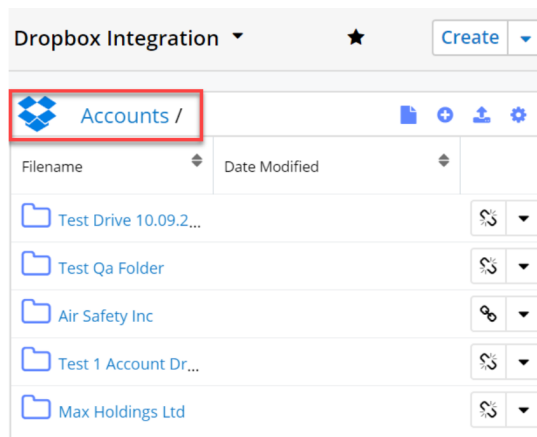
Dropbox Google Drive One Drive

Dropbox Account Configuration

Dropbox Application ID:

Dropbox Root Path: ⓘ

Select Root Path Validate Root Path



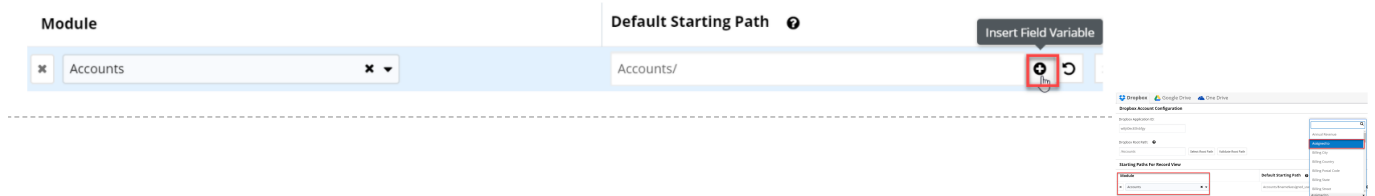
Starting Paths for Record View

There are two methods that users can choose from.

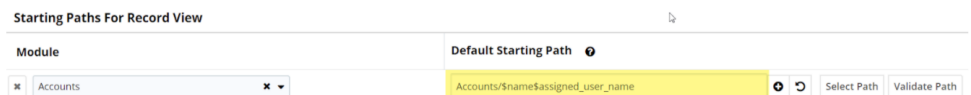
- **Module:** By using this method, users can define the module which will have a specific path.
- **Dropbox Default Path:** By using this method, users can define the desired path from Record View.

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.



Select your path by using the **Select Path** button and validate it by using the **Validate Path** button.

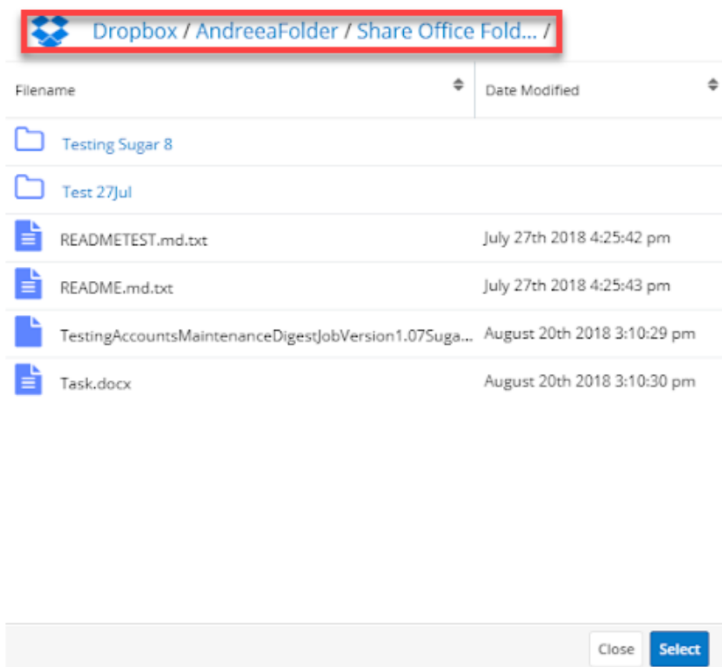


Returning to the default path can be achieved by pressing the **"Reset"** button.

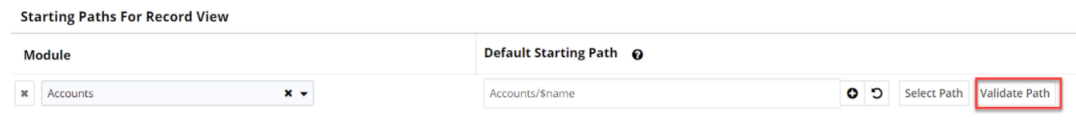
Note: Paths that contain variables cannot be validated.

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

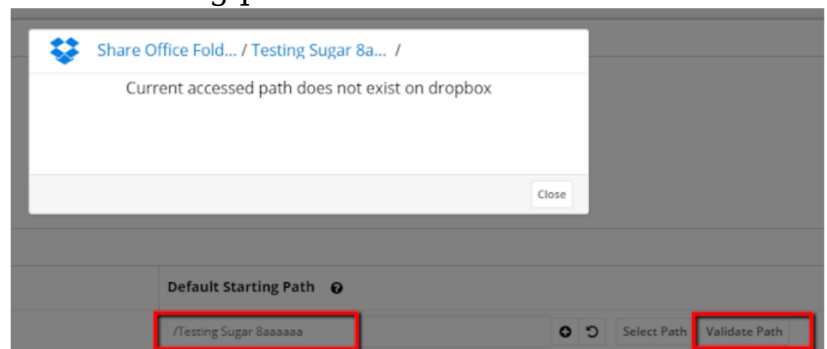
the **Default Path** set for the module.



Users can validate the default starting path for record view.



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.

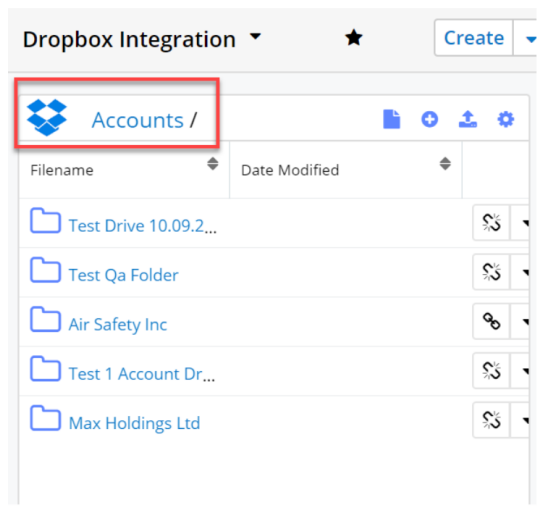
To use the integration, users must first sign in to Dropbox from the Dropbox

Integration dashlet.

Dashlet Options

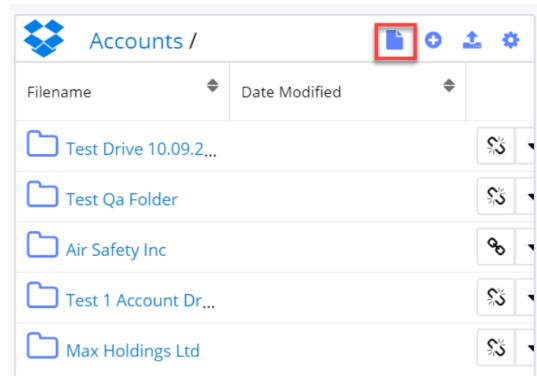
All Sugar modules where dashlets can be created can be integrated with Dropbox. After logging in, users can:

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

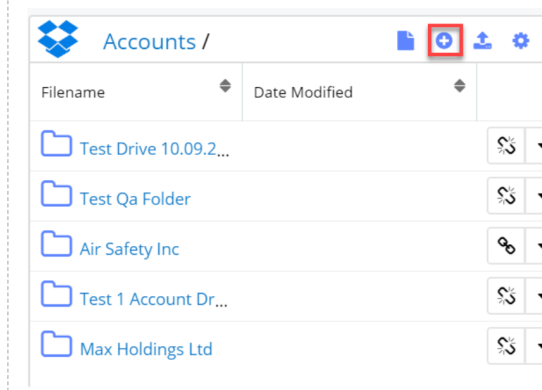


The Dropbox Integration Dashlet also allows users to perform several actions:

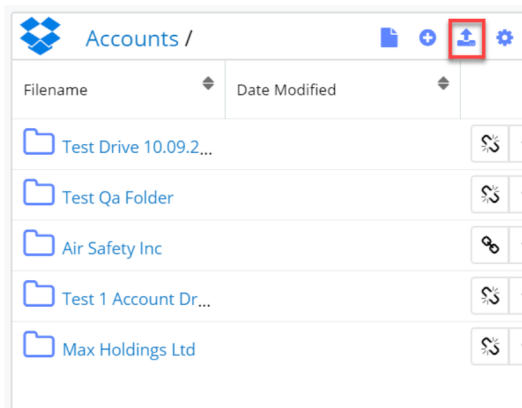
- **Add a new signed document / Merge documents** (for [wDocs](#) and [Sugar Connector to DocuSign](#) users)



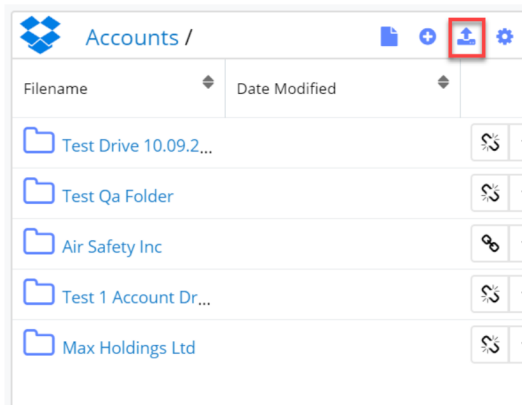
- **Create folder**



- **Upload files**



- **Configure the dashlet**



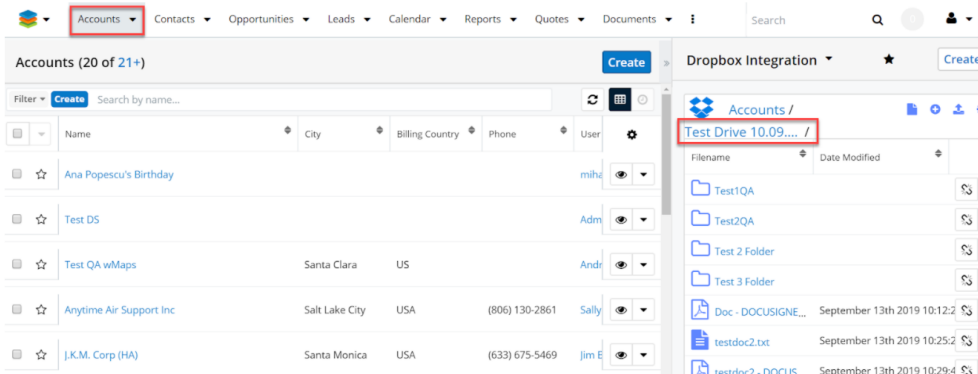
Users have the following configuration options:

- **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

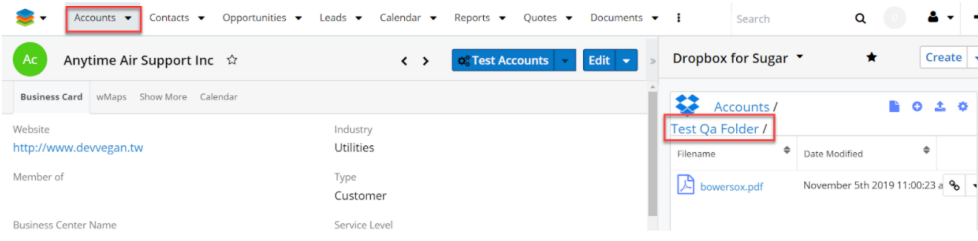
path.

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.

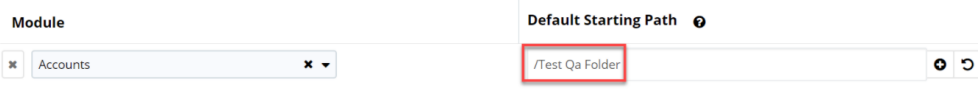
Users can also create custom paths on both **List View** and **Record View**.



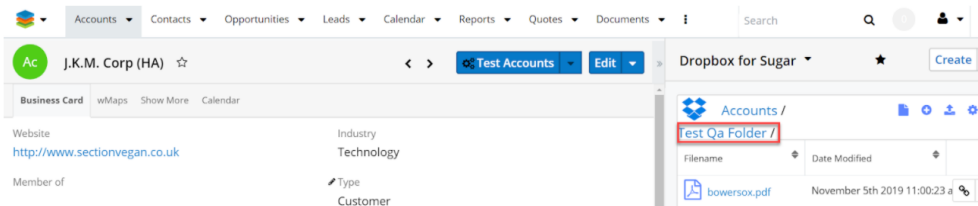
The new path will overwrite the path set in **Administration**.



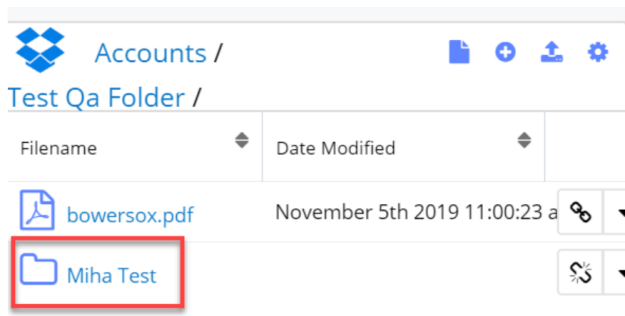
Starting Paths For Record View



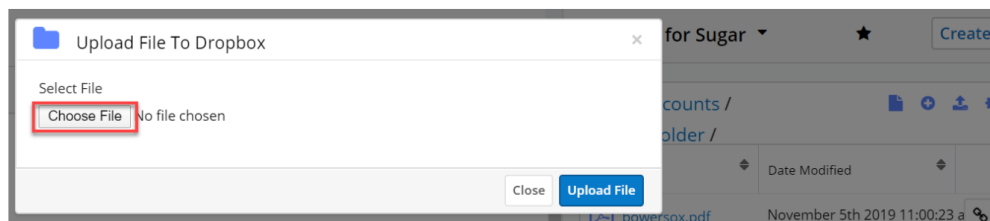
All other records will have the path defined in Administration.



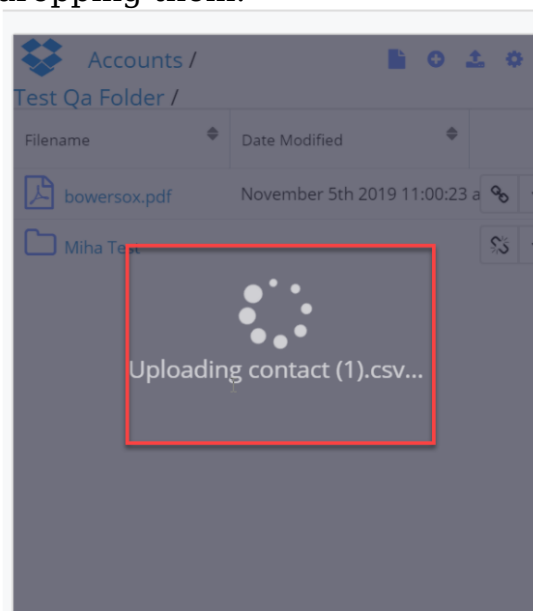
- **Create folder:** the button allows users to create new folders directly from the Dropbox Integration Dashlet.

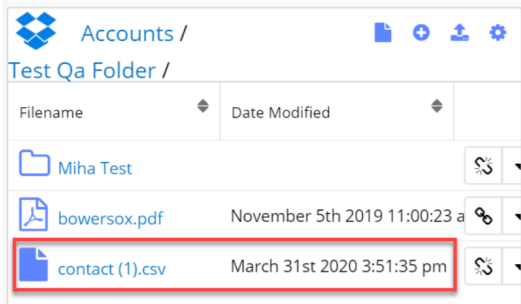


- **Upload file:** upload new file to Dropbox

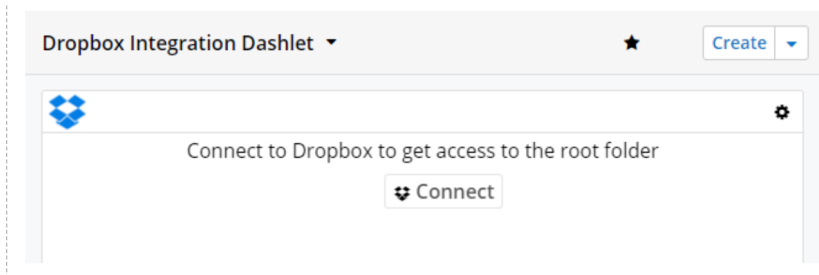


Users can also upload files to the Dropbox Integration Dashlet by dragging and dropping them.





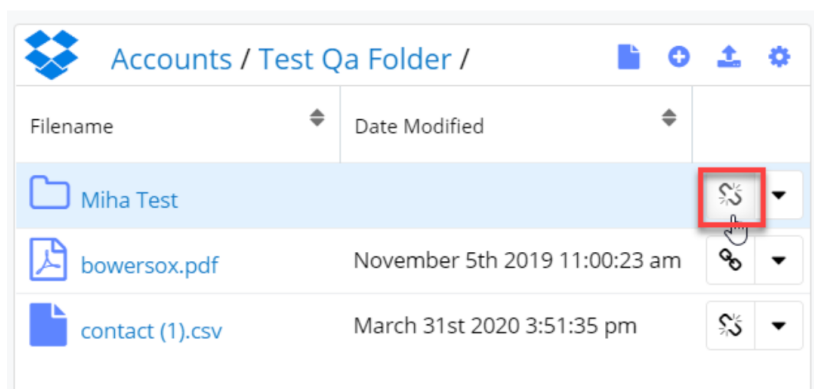
- **Logout:** Logout of the Dropbox dashlet. When a user logs out, the username does not clear. If you want to login with another user and try to connect, you will be logged back in with the same user. The Dropbox authentication flow is not allowing the user to connect to another account, unless the 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.

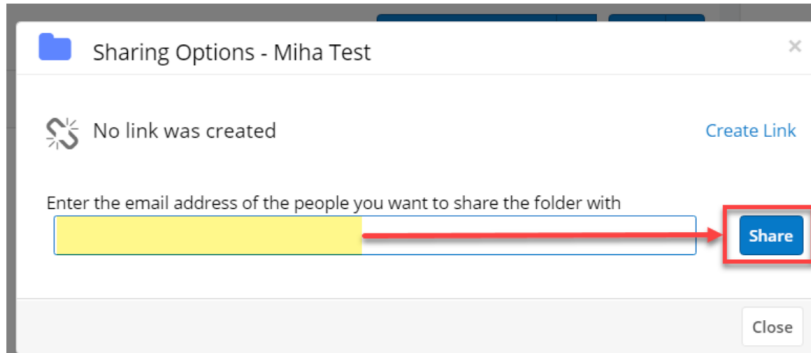


File and Folder Options

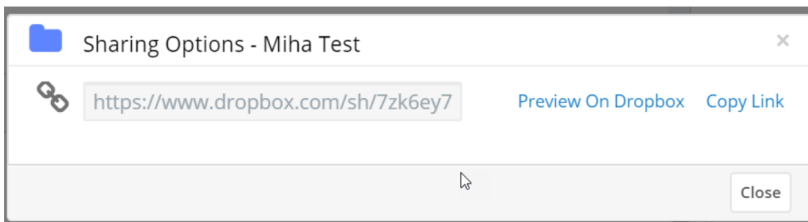
The **Dropbox Integration Dashlet** offers users several actions they can perform for each folder.

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

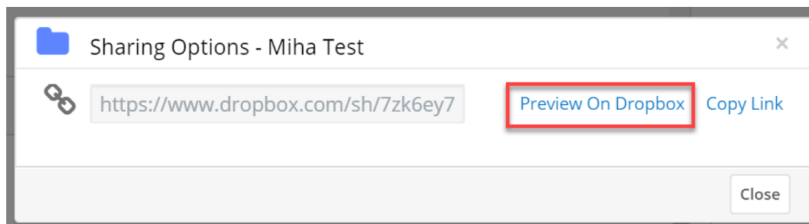




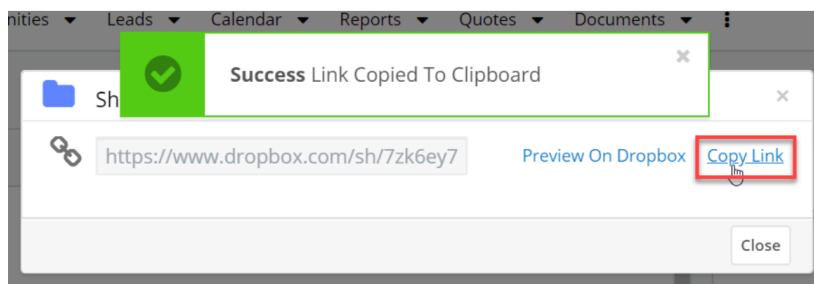
After creating the link, users have two methods available to share it.



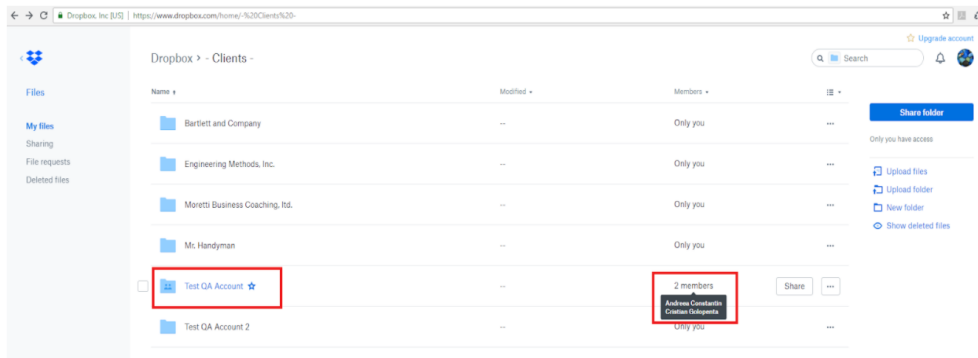
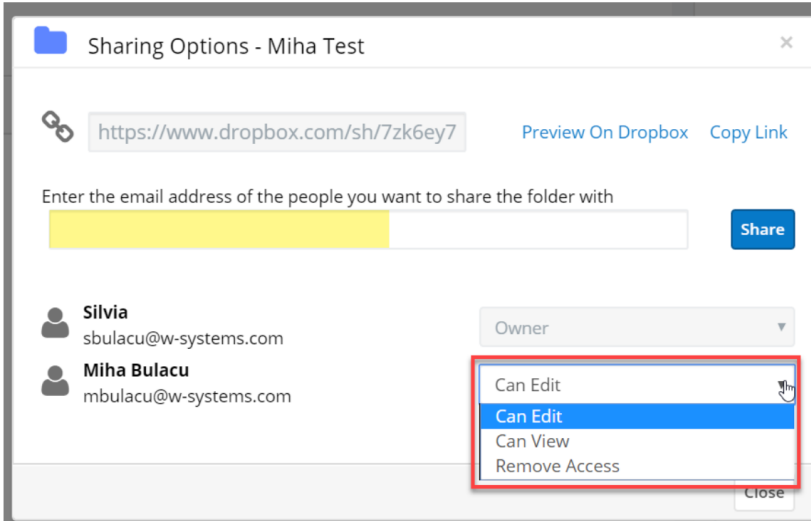
1. **Preview On Dropbox:** this option will open the folder in the web application for Dropbox.



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

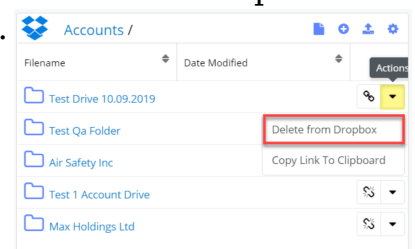


Once the link for the folder is created, it can be shared with multiple users by adding the users' email addresses on the dialog and setting their rights, or by pasting the copied link.

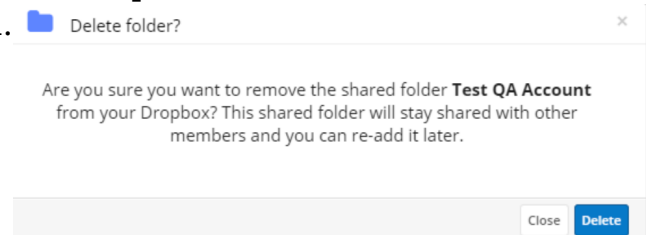


In the **Actions menu** of each folder, users have two options available:

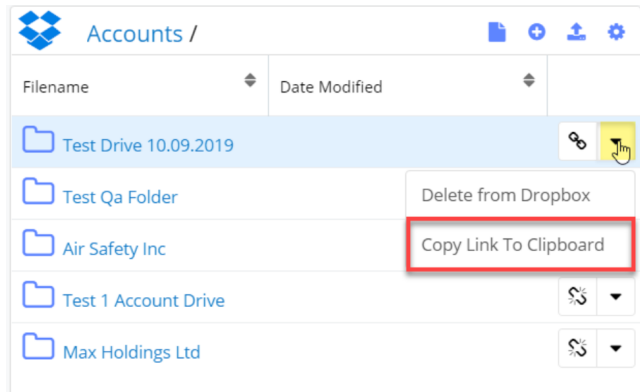
- **Delete from Dropbox:** this option allows the user to delete a Dropbox folder directly from within the Dropbox dashboard.



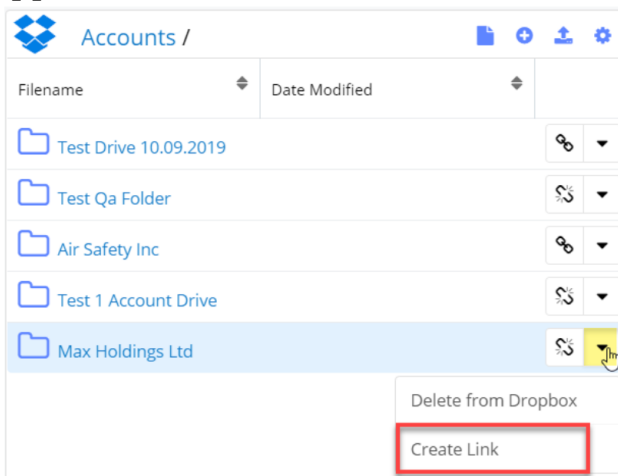
The following message is raised when users press the **Delete from Dropbox** action in the Actions menu.



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

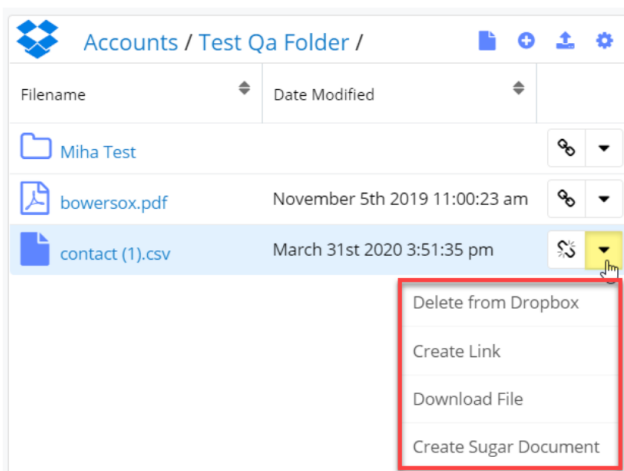


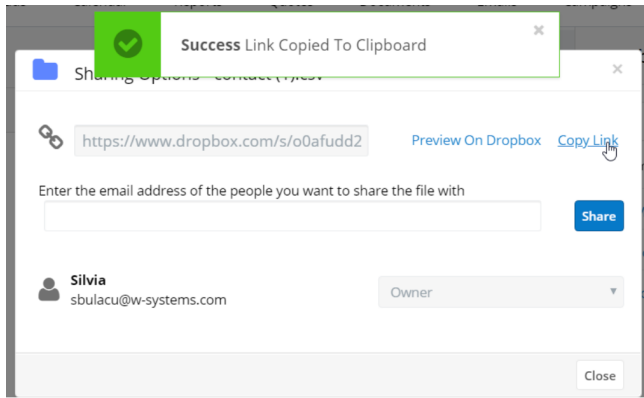
In case the folder doesn't have a sharable link created, the **Create Link** action will appear in the Actions menu, instead of the **Copy Link to Clipboard** action.



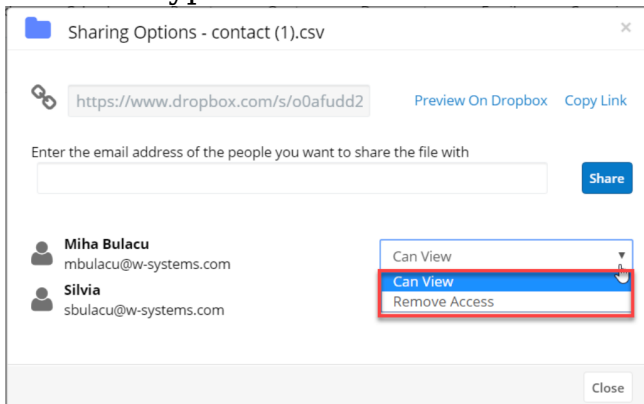
Actions for Files

Folder files also have available a series of actions:

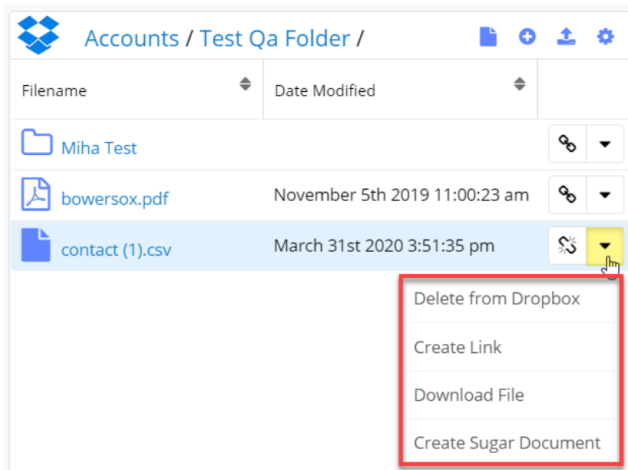




After creating the link, users can share the file with others. They can also set different types of access for each user.

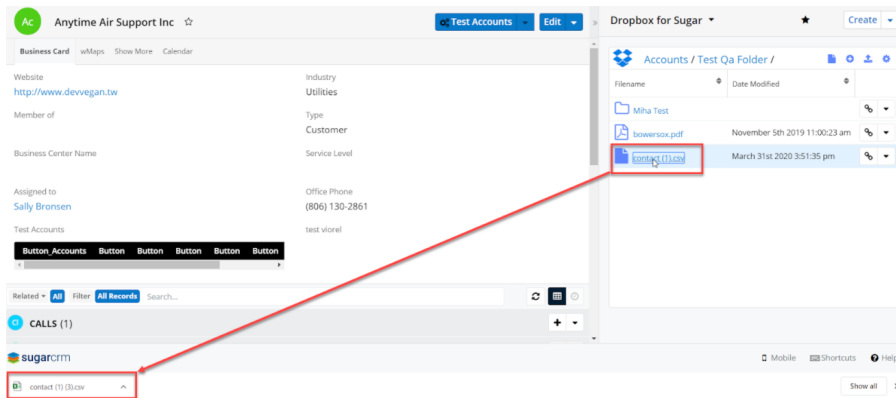


Files with created links have the following actions available in the **Action menu**:

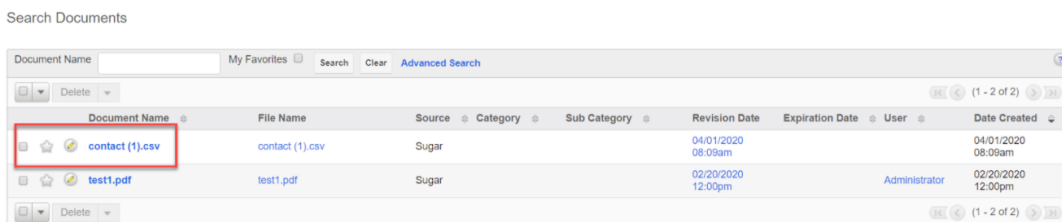


- **Delete from Dropbox:** this action allows users to delete the file directly from within the Dropbox dashboard.
- **Copy Link to Clipboard:** this action allows users to copy the file's link to their clipboards directly from within the Dropbox dashboard.
- **Download File:** this action allows users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

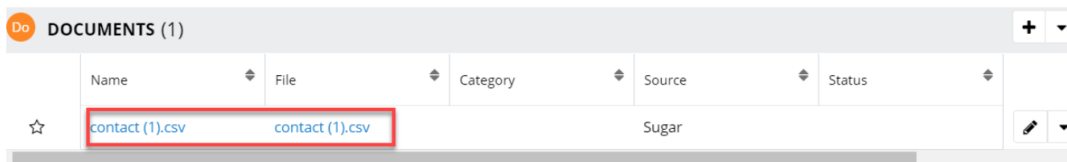
within the Dropbox dashboard. This can be achieved by clicking on the file.



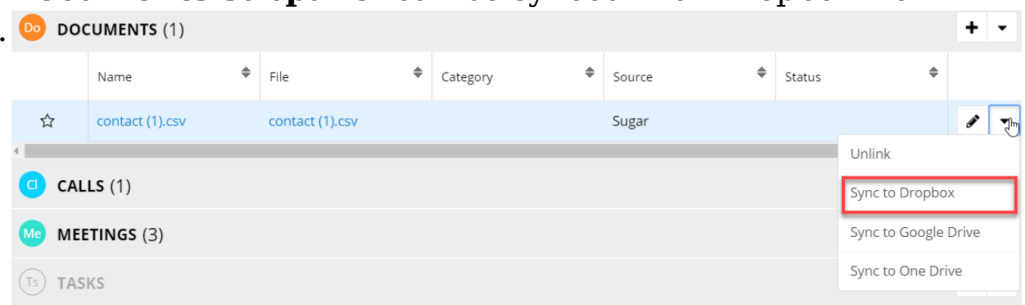
- **Create Sugar Document:** creates a Sugar Document with the attached file in the Sugar Documents module.



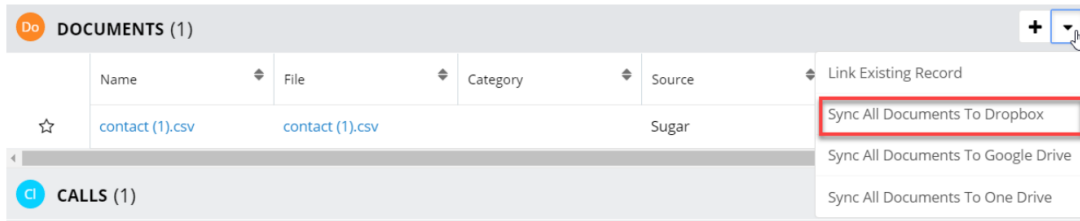
The Sugar document will also be added to the **Documents subpanel in Record View**.



All documents in the **Documents subpanel** can be synced with Dropbox from their **Action menus**.



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

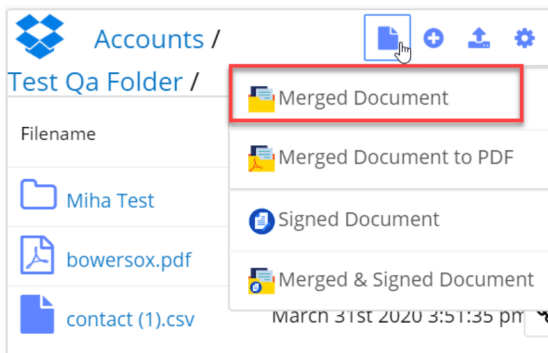


Dropbox Integrations with wDocs

Merge Options for Dropbox

The wDrive Dropbox Integration dashlet offers [wDocs](#) users merge options straight from within their dashlet:

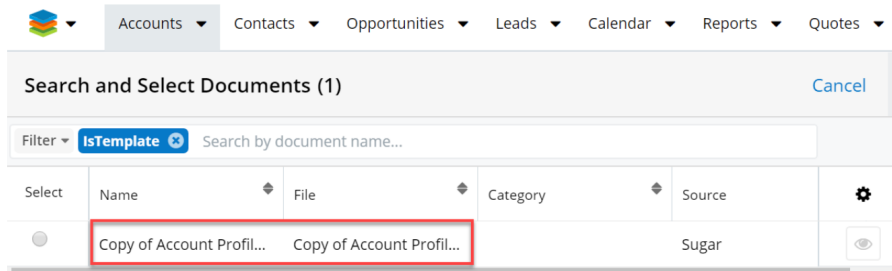
- [Merged Document](#)
- [Merged Document to PDF](#)



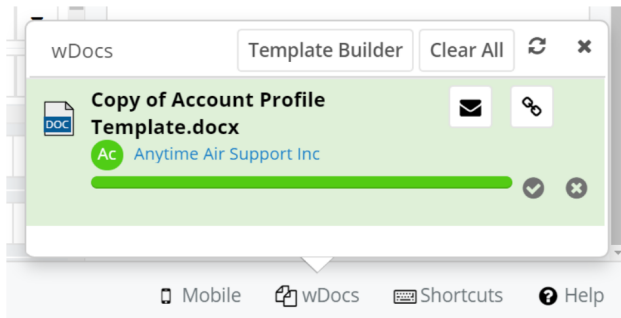
Note: For [Sugar Connector to DocuSign](#) users, the Signed Document and Merged & Signed Document are also available.

Merged Document

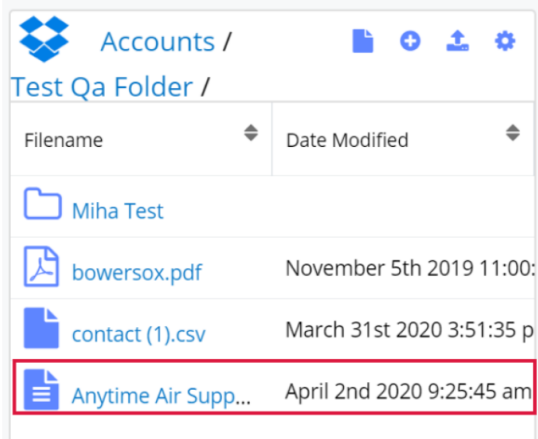
This action allows users to create a new document based on a template.



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.

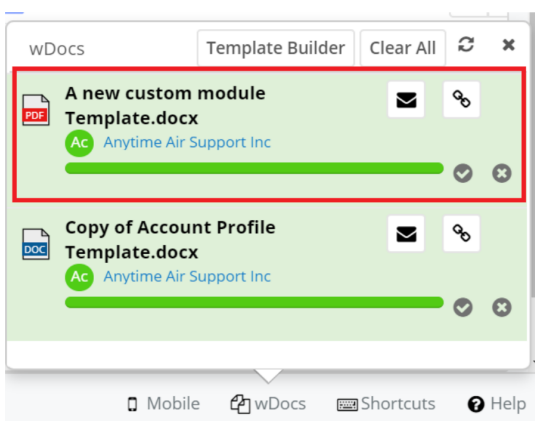


After the document merge is complete, users can find it in the [wDocs](#) footer widget, which will also be added to their **Dropbox dashlet**, and in the **Documents Subpanel** in Record View.

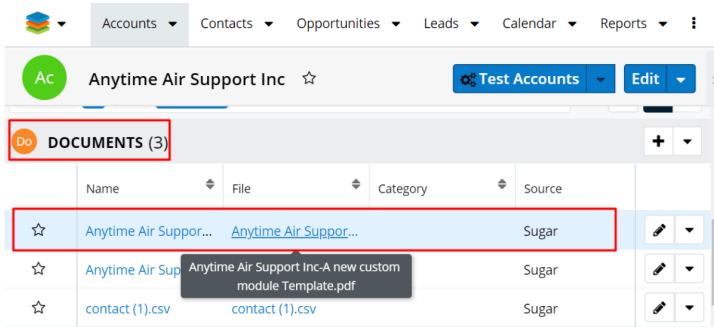
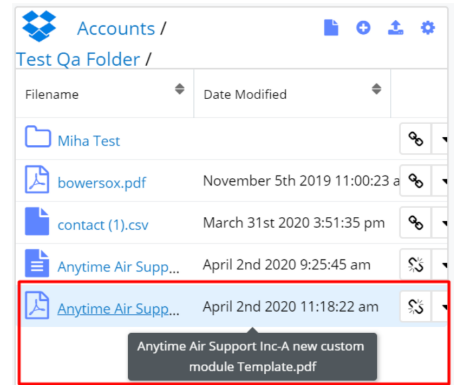


Merged Document to PDF

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

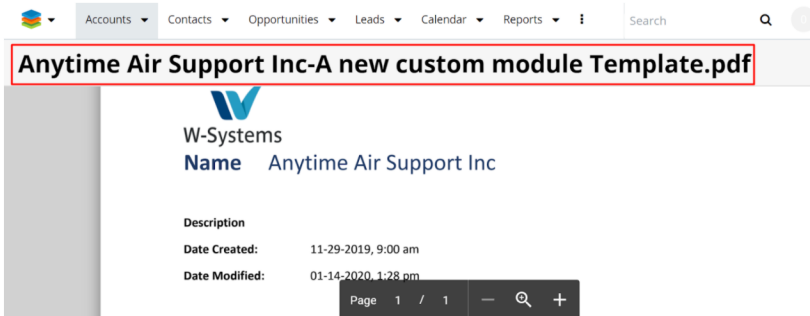


The merged PDF will appear in the [wDocs](#) footer widget, but also in the **Dropbox dashlet** and the **Documents subpanel** in Record View.

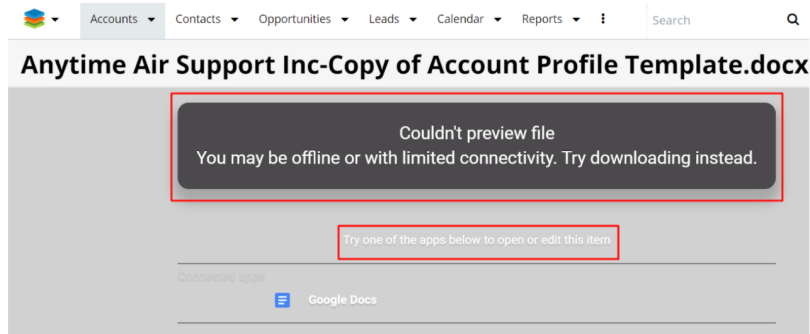


Preview Files

By clicking on any of the files in the [Dropbox dashlet](#), users can preview their contents. This feature is only available for .pdf, .docx, .jpg, .png files.

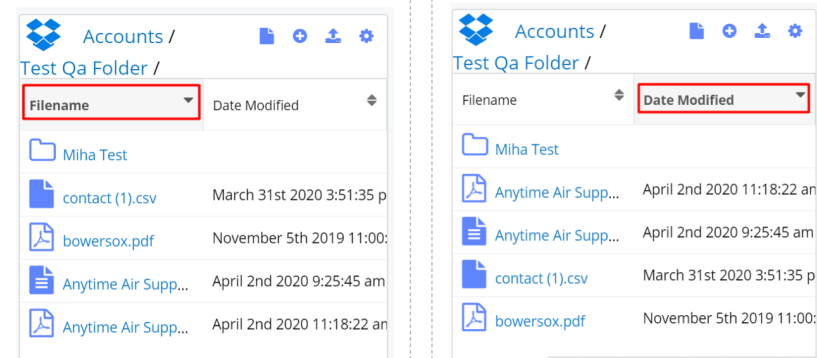


Files that have another format will be downloaded when clicking on them and this message will appear.



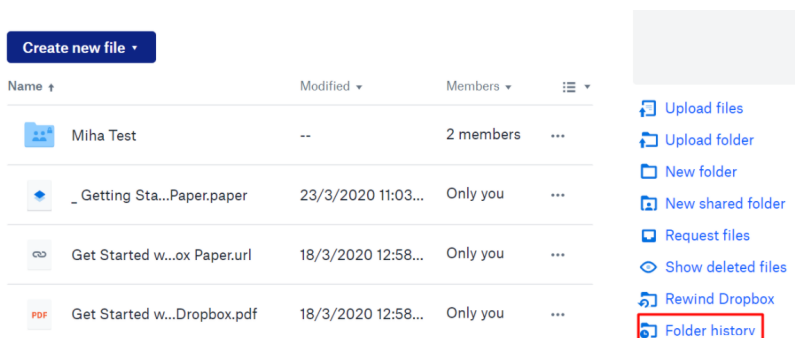
Sort Files and Folders

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



Dropbox File Revisions Management

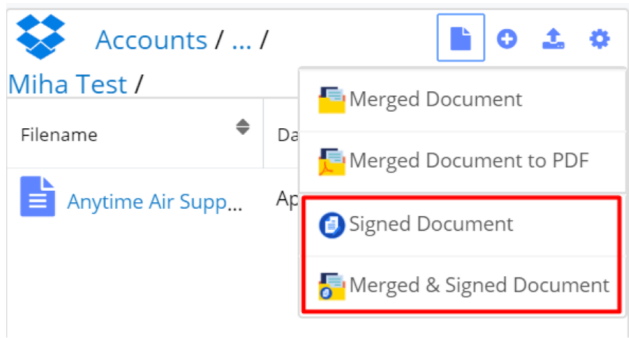
When uploading files, the file revision management option is available. Instead of having duplicate files, a new revision of the file is created, if the file name already exists in the target location.



Dropbox Integration with Sugar Connector to DocuSign

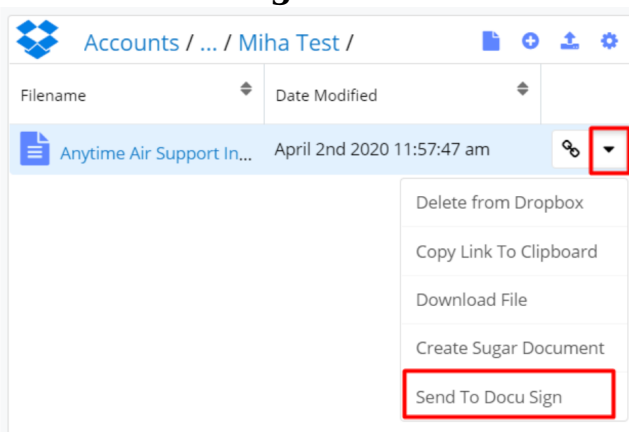
Documents stored in the Dropbox application can be signed from the [Dropbox Integration Dashlet](#) by using one of the following options:

- [Signed Document](#)
- [Merged and Signed Document](#)



This functionality is only available to [Sugar Connector to DocuSign](#) users.

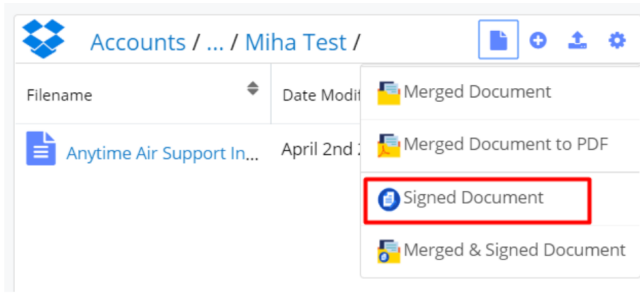
From the file's action menu, users can send documents for signature by using the **Send to DocuSign** action.



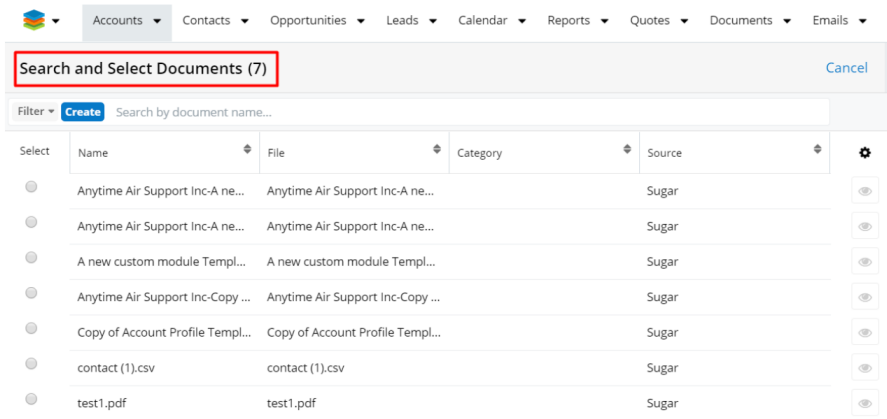
Note: This action is only available for .docx and .pdf files.

Signed Document

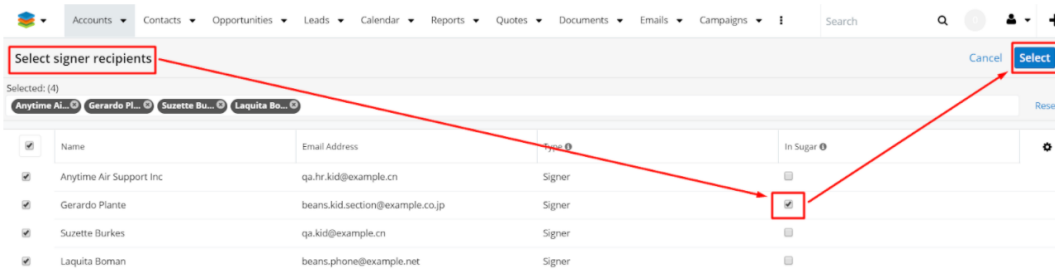
This function allows users to select a Sugar document and sign it.



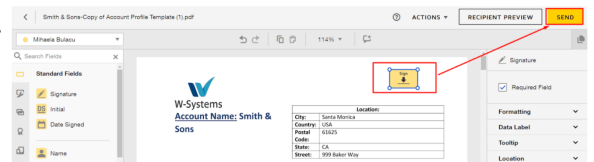
After clicking the **Signed Document** option, the **Search and Select Documents** drawer will open. Select the desired document.



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



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

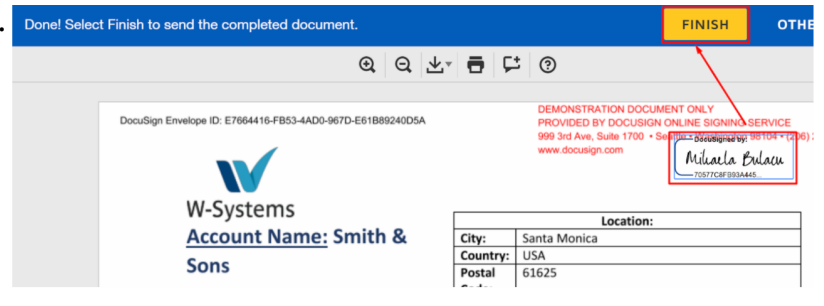


D

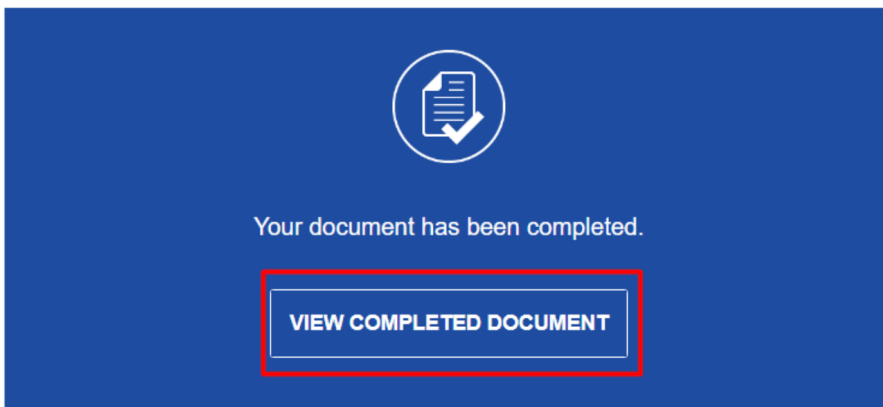
M
[m](#)

M

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

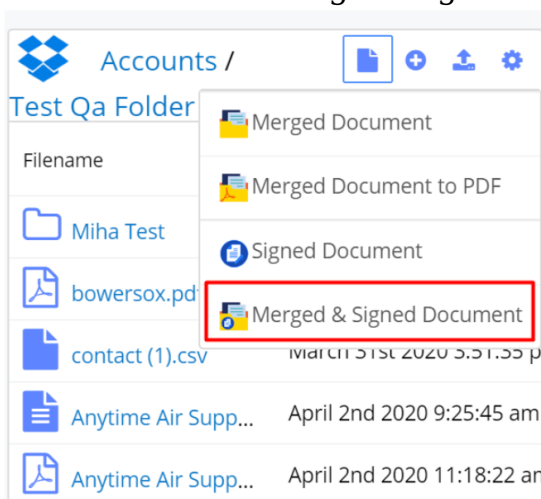


DocuSign

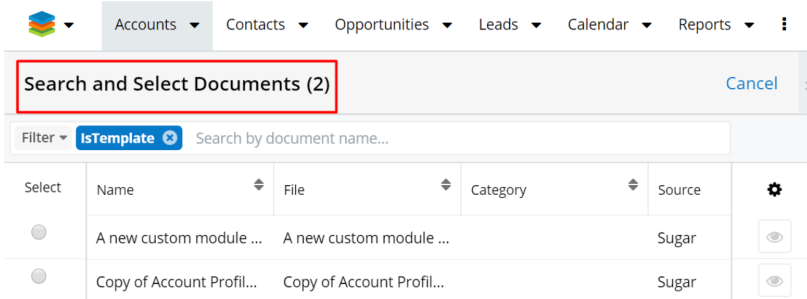


Merged and Signed Documents

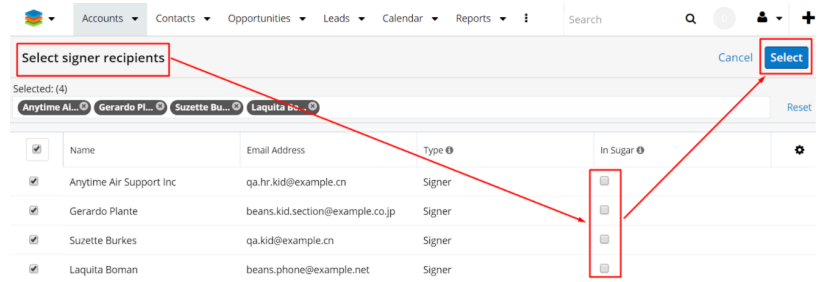
This option allows users to use two functions at the same time: [wDocs'](#) Merge function and DocuSign's Sign function.



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



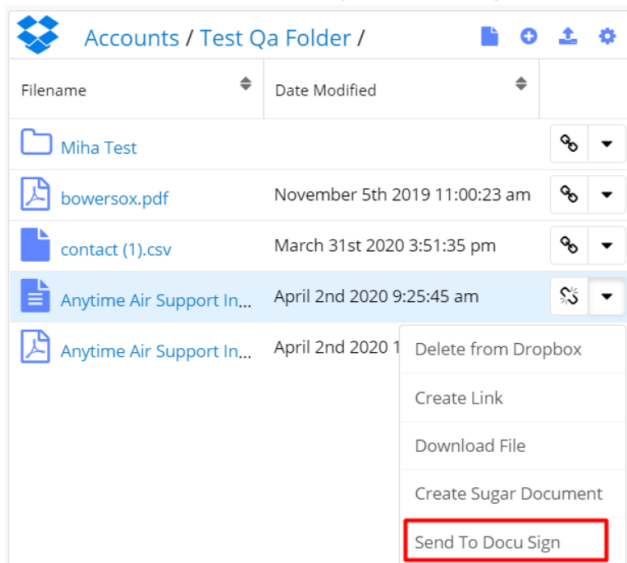
After selecting your template, the **Select Signer Recipients** drawer will open. Select the Signer recipient(s).



The document will first be merged, then sent to signature. The process is similar to the [Signed Document](#) process.

Send to DocuSign

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

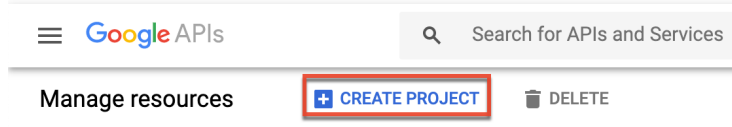


Google Drive Integration

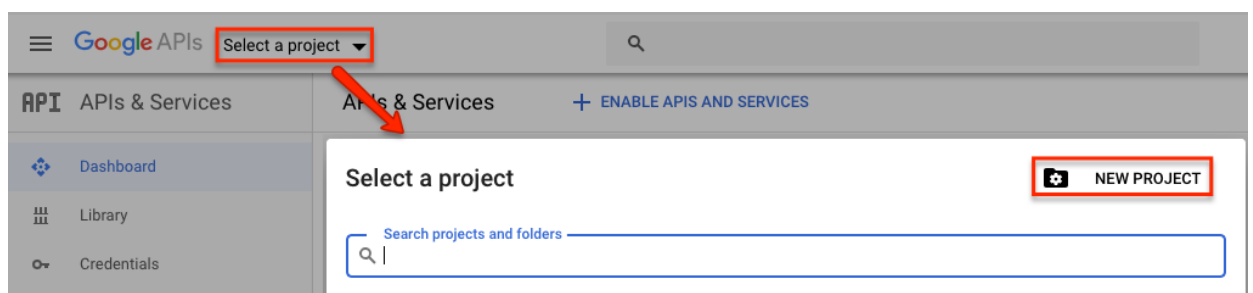
- [Define Google Drive Settings](#)
- [Google Drive Integration Dashlet](#)
- [Starting Paths for Record View](#)
- [Create Google Docs Documents from a Template in the Google Drive Integration Dashlet](#)
- [Create Google Sheets Spreadsheets from a Template in the Google Drive Integration Dashlet](#)
- [Create Google Slide Presentation from a Template in the Google Drive Integration Dashlet](#)
- [Google Drive Revision Management](#)
- [Google Drive Integration with Sugar Connector to DocuSign](#)

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 [Google Developers site](#) 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".

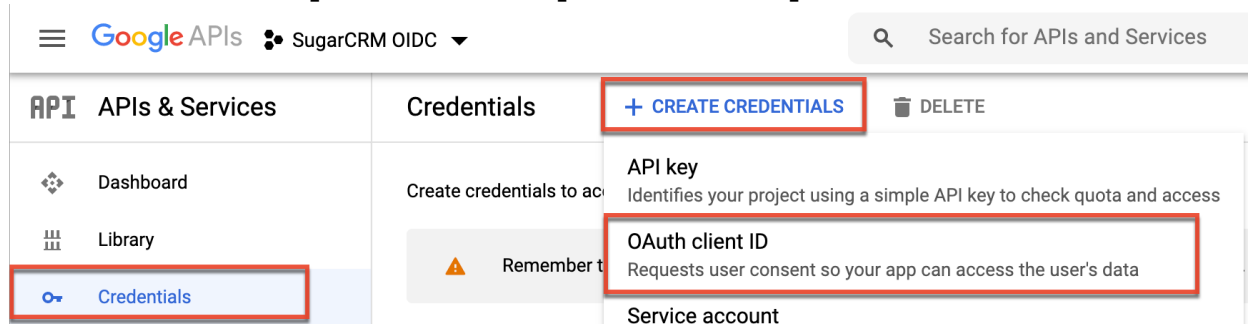


- If you do not see the Create Project button, then click "Select a project" in the navigation bar. Click "New Project" in the Select a project window, enter a project name of your choice (e.g., Sugar Google Drive Integration), and then click "Create".



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.



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

← Create OAuth client ID

A client ID is used to identify a single app to Google's OAuth servers. If your app runs on multiple platforms, each will need its own client ID. See [Setting up OAuth 2.0](#) for more information.

Application type *
Web application

[Learn more](#) about OAuth client types

Name *
SugarCRM OIDC

The name of your OAuth 2.0 client. This name is only used to identify the client in the console and will not be shown to end users.

i The domains of the URIs you add below will be automatically added to your [OAuth consent screen](#) as [authorized domains](#).

Authorized JavaScript origins **?**

For use with requests from a browser

+ ADD URI

Authorized redirect URIs **?**

For use with requests from a web server

URIs

https://yoursugarinstance.com/custom/googledrive_authentication_redirect.html

+ ADD URI

CREATE

CANCEL

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 [defining the Google Drive settings](#) 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

[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** One Drive

Google Drive Account Configuration

Google Drive Application ID:

Google Drive Application Secret:

Google Drive Root Path: ⓘ

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.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calendar ▾ Reports ▾ Quotes ▾ Documents ▾ Emails ▾ Campaigns ▾ Calls ▾ ⓘ Search 🔍 0 👤 +

Dropbox **Google Drive** One Drive

GOOGLE DRIVE ACCOUNT CONFIGURATION

Google Drive Application ID:

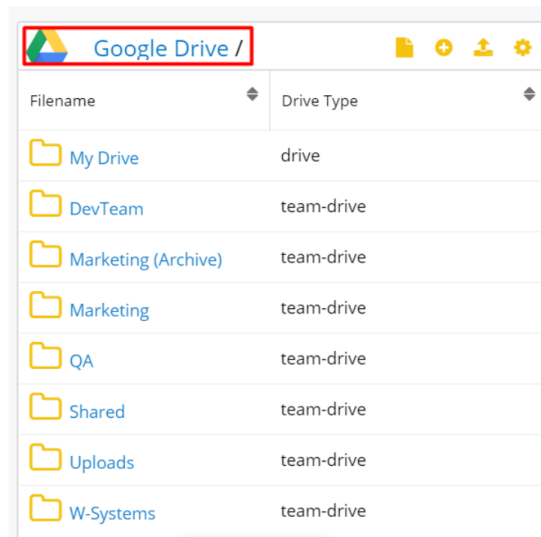
Google Drive Application Secret:

Google Drive Root Path: ⓘ

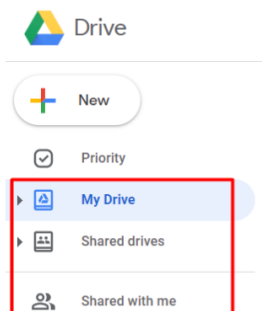
5. Add the default starting path for every Google Drive dashlet in the **Google Drive Root Path** field.

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**



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 Contacts Opportunities Leads Calend.

Dropbox Google Drive One Drive

Google Drive Account Configuration

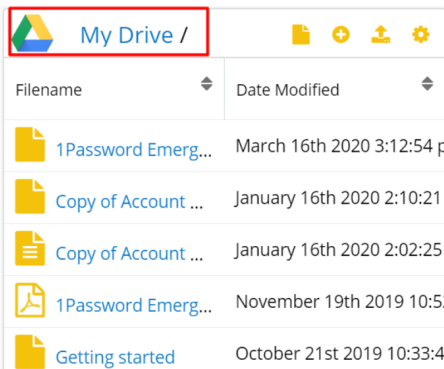
Google Drive Application ID:
74771787164-unj8js7h1bd1015k8bd0nfpikj823vm.apps.googleusercontent.com

Google Drive Application Secret:
RwkfqSPgvkLMROcuiQIfjJsk

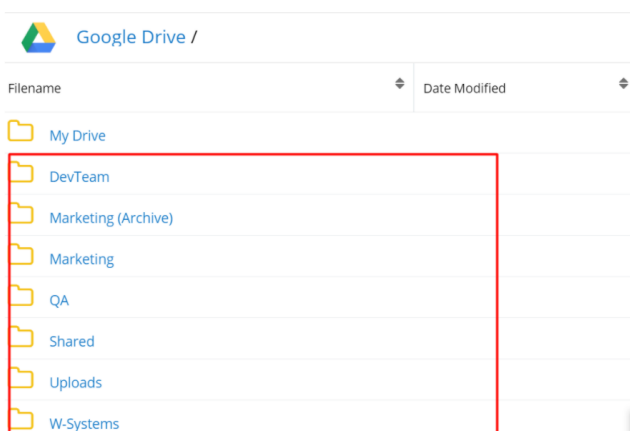
Google Drive Root Path: ⓘ
/My Drive

Select Root Path Validate Root Path

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



- **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.



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

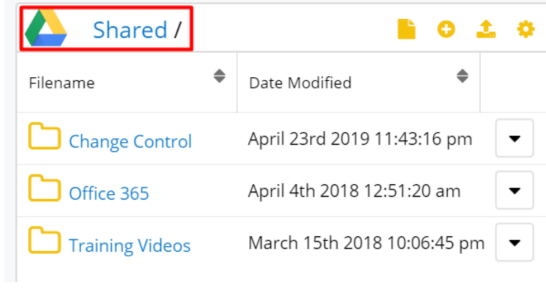
Google Drive Root Path: ⓘ

/Shared

1 Select Root Path

2 Validate Root Path

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



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



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:

Starting Paths For Record View ⓘ

Module

Accounts

Default Starting Path ⓘ

Accounts/\$name

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 ⓘ

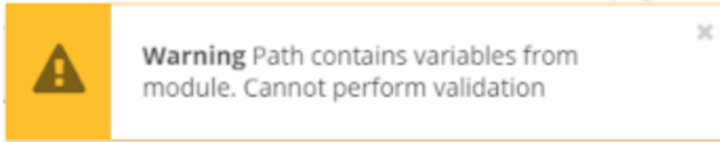
Users can return to the default Path by pressing the **Reset** button.

Starting Paths For Record View

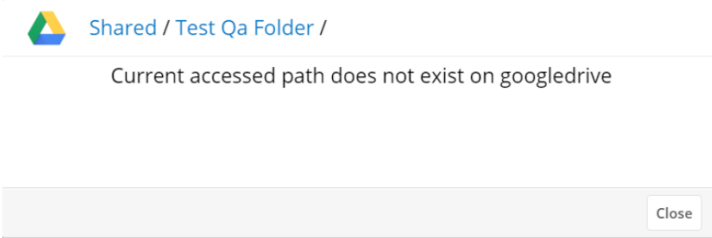
Module	Default Starting Path ⓘ
✖ Accounts ✖	Accounts/\$name ⓘ ⌂

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



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



Google Drive Integration Dashlet

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

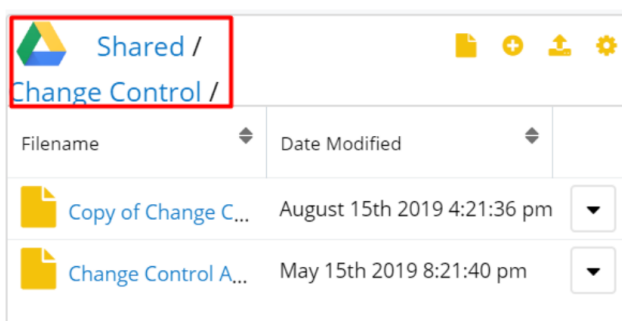
Users need to first add their Google Drive Integration Dashlet to Sugar's **Home View**, **List View** or **Record View**.

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

Dashlet Actions

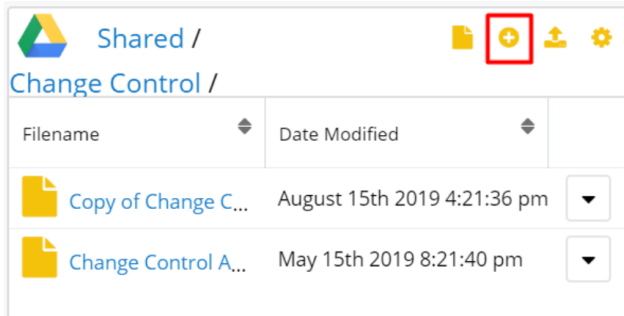
All Sugar modules with a dashlet integration can be used with the **Google Drive Integration Dashlet**. After logging in to your Google Drive account with the dashlet, users can perform the following actions from the dashlet.

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

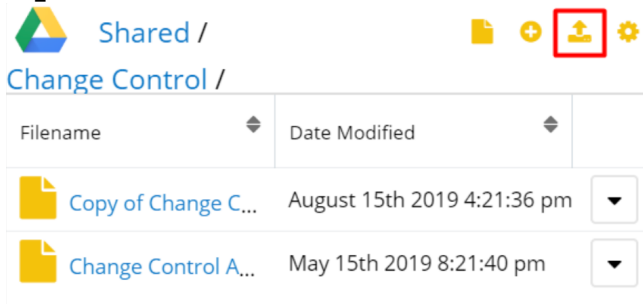


Actions available from the Google Drive Integration Dashlet:

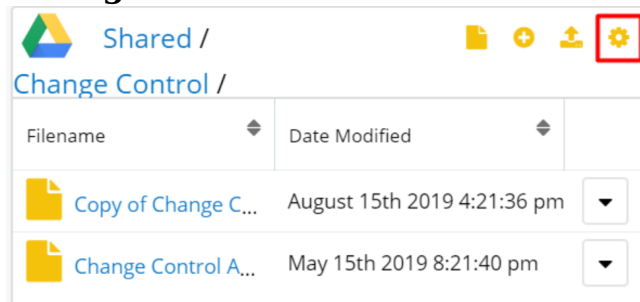
- **Create Folder**



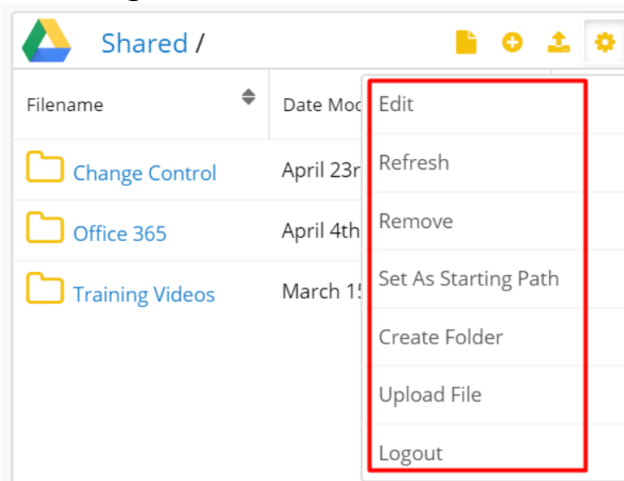
- **Upload Files**



- **Configure the Dashlet**



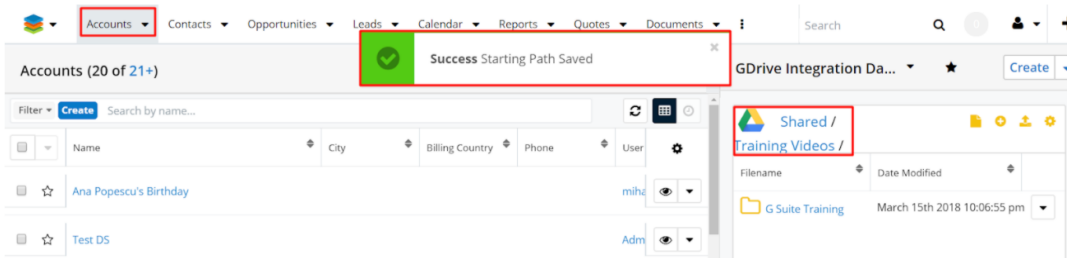
The configuration options for the Google Drive Integration dashlet are the following:



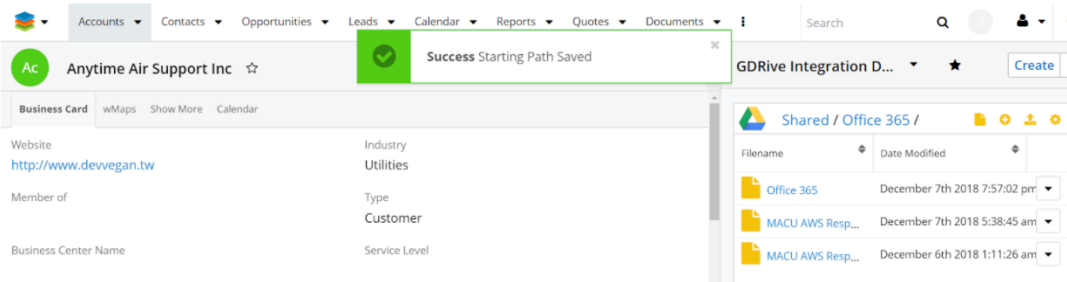
- **Edit:** allows users to edit the dashlet.
- **Refresh:** lets users refresh the dashlet.
- **Remove:** remove the Google Drive Integration Dashlet.

- **Set as Starting Path:** when within a folder, users can set that folder as a new starting path 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.

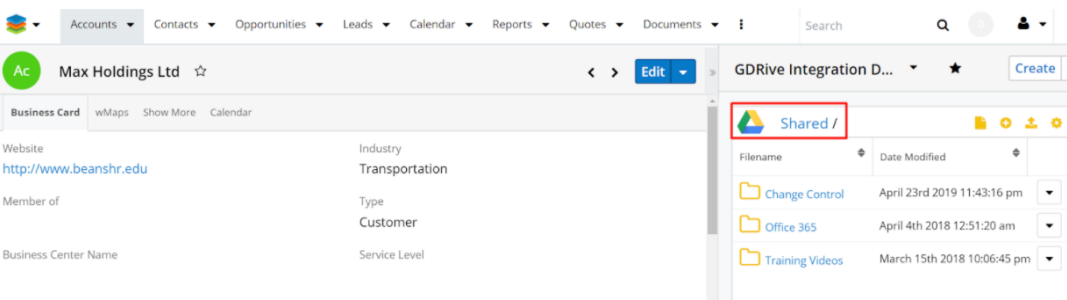
Custom paths can be defined on either **List View** or **Record View**.



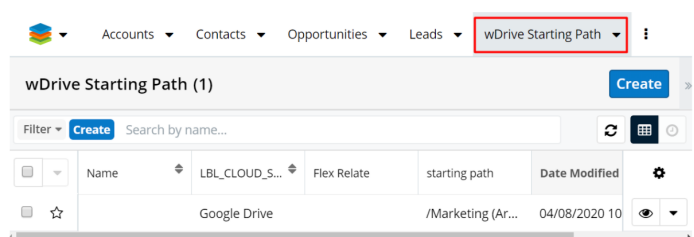
The path created using the "**Set As Starting Path**" button will overwrite the path defined in **Administration** on **record view** for the selected record.



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

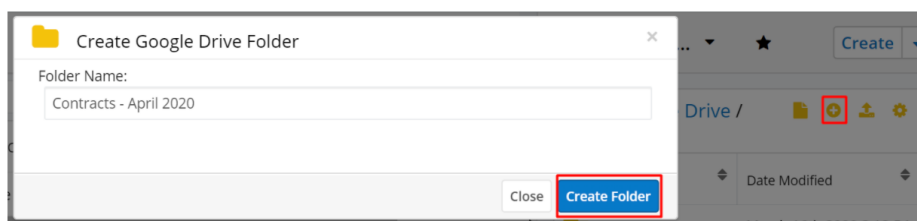


All paths created by using the "**Set As Starting Path**" action are saved in a new module called "**wDrive Starting Path**".

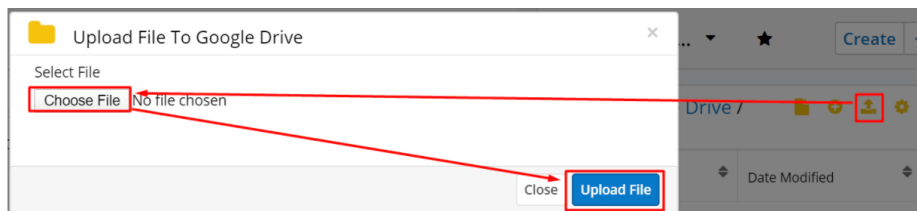


Users can return to the paths defined in **Administration** only after removing the paths defined from the dashlet and stored in this module.

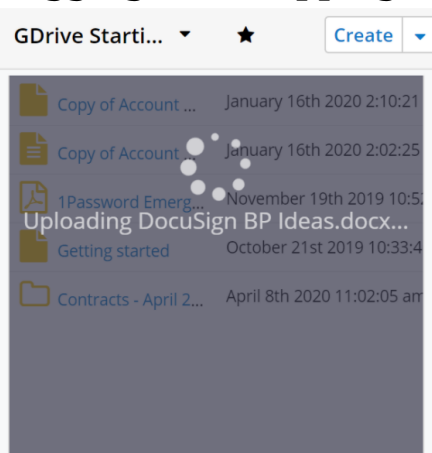
- **Create Folder:** This action enables users to create Google Drive folders directly from within the Dashlet.



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



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



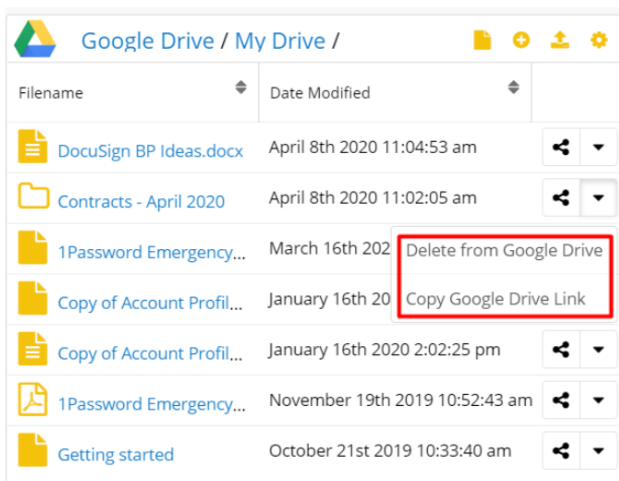
-
- **Logout:** allows users to log out of the Google Drive Integration Dashlet.

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

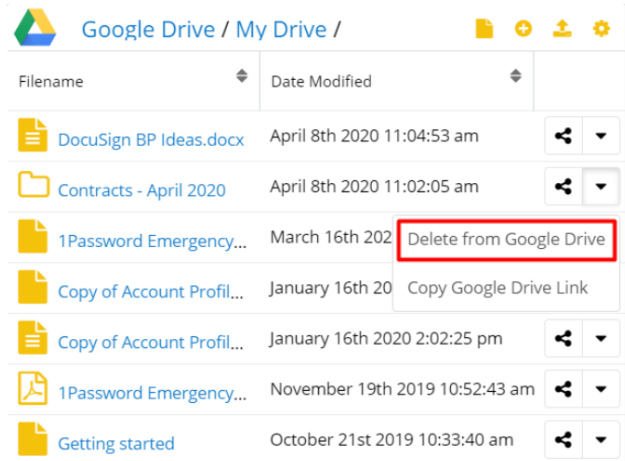
The Google Drive Integration Dashlet allows users to perform different actions from the Dashlet.

Folder Actions



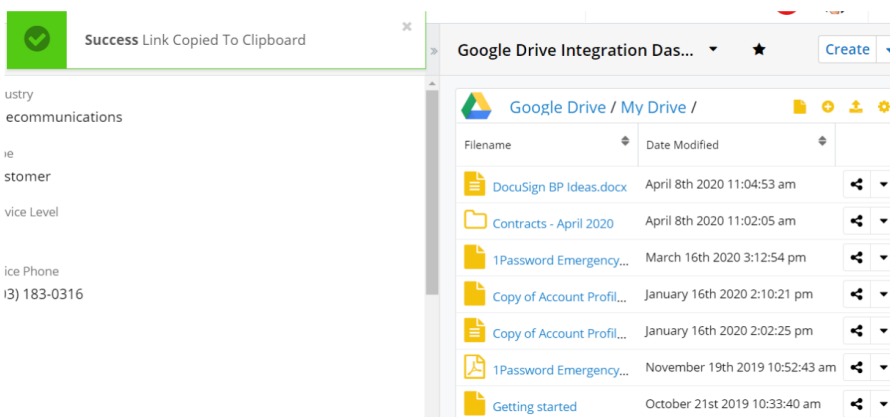
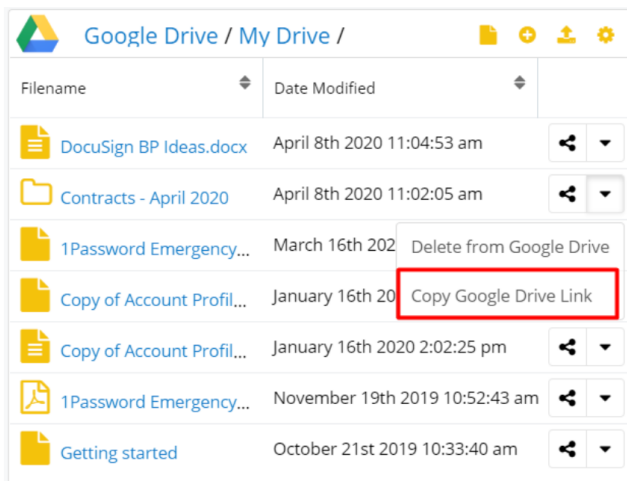
Delete from Google Drive

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



Copy Google Drive Link

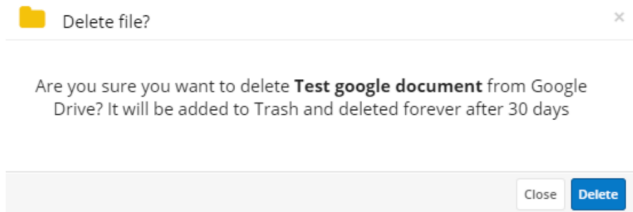
This action allows users to copy to their Clipboards the Google Drive Link of the folder.



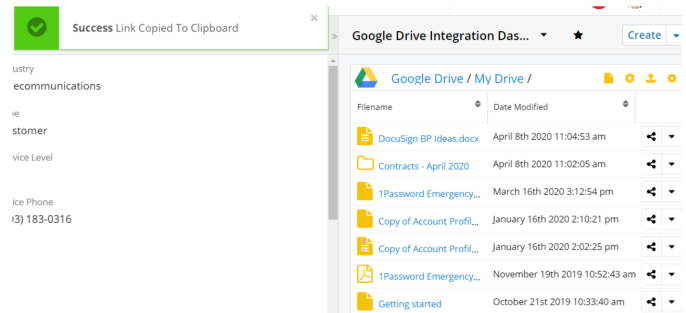
File Actions

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.



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:

Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).

Search Documents

Document Name	File Name	Source	Category	Sub Category	Re
Copy of Account Profile Template.docx	Copy of Account Profile Template.docx	Sugar			04.08
DocuSign BP Ideas.docx	DocuSign BP Ideas.docx	Sugar			04.08

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

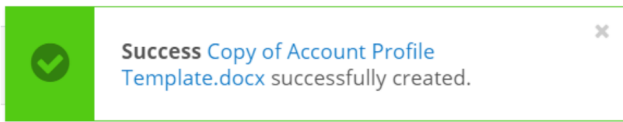
Accounts Contacts Opportunities Leads Calendar Documents

Ac Smith & Sons ☆ Edit

Do DOCUMENTS (2) +

Name	File	Category	Source
☆ Copy of Account Pr...	Copy of Account Pr...		Sugar
☆ DocuSign BP Ideas...	DocuSign BP Ideas...		Sugar

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**.

Accounts Contacts Opportunities Leads Calendar Reports

Ac Smith & Sons ☆ Edit

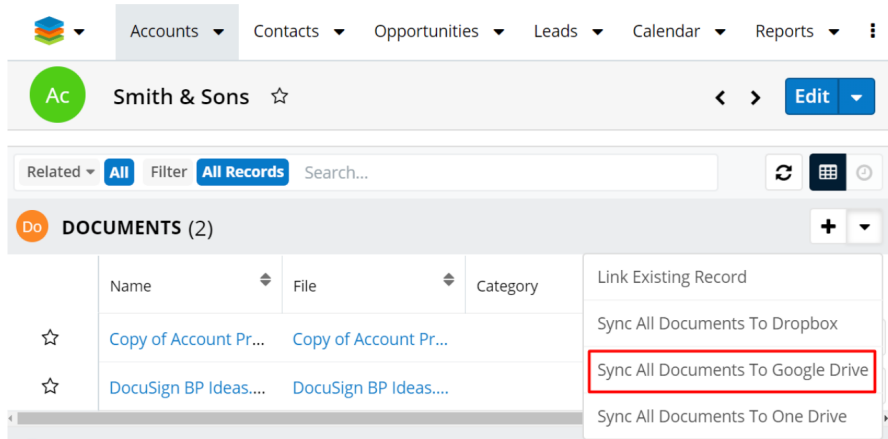
Do DOCUMENTS (2) +

Name	File	Category	Source
☆ Copy of Account Pr...	Copy of Account Pr...		Sugar
☆ DocuSign BP Ideas...	DocuSign BP Ideas...		S

Unlink
Sync to Dropbox
Sync to Google Drive
Sync to One Drive

CALLS (1)
MEETINGS (4)

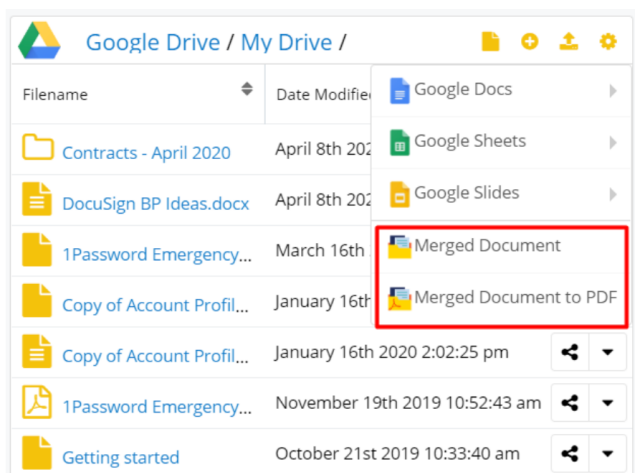
From the **Subpanel's Action Menu**, users can synchronize en-masse all documents available in the subpanel with the **Sync All Documents to Google Drive** action.



Merge Options for the Google Drive Integration Dashlet

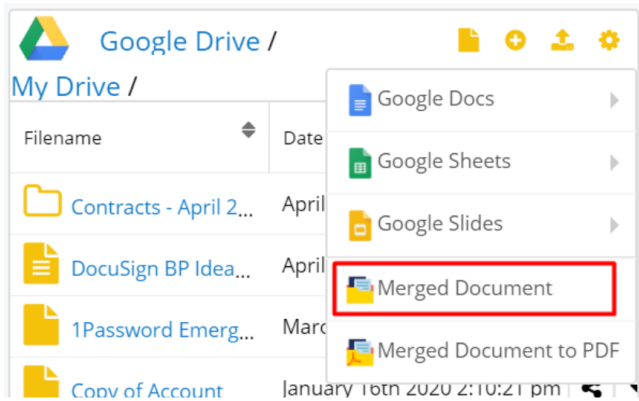
[wDocs](#) users can merge documents from templates from the Google Drive Integration Dashlet. Users have two merging options available from the dashlet:

- [Merged Document](#)
- [Merged Document to PDF](#)

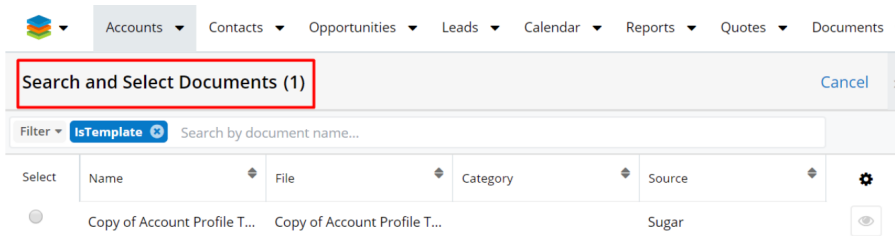


Merged Document

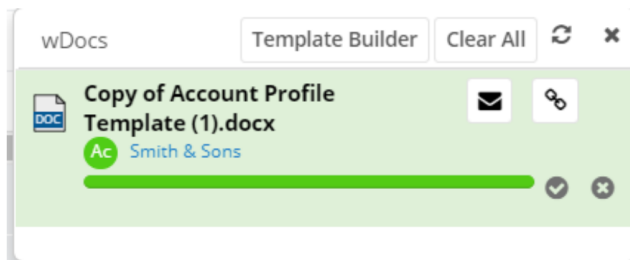
This option allows users to [create a new .docx document from a template](#). To merge documents in **Record View** from the Google Drive Integration Dashlet, choose the **Merged Document** action from the dashlet header.



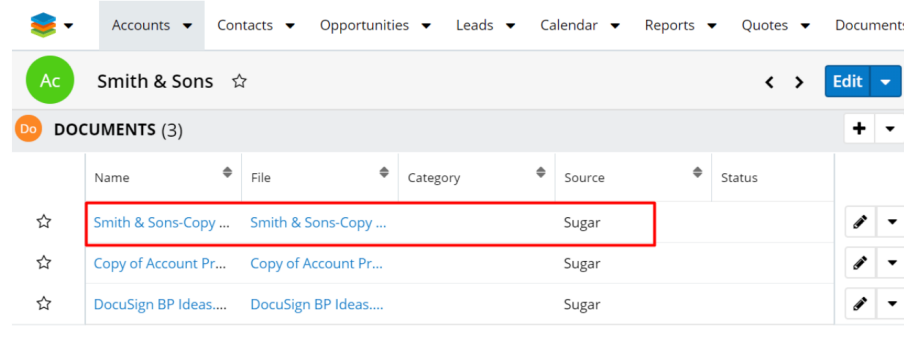
This will open the **Search and Select Documents** drawer with the available templates.



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 [wDocs widget](#) available in your Sugar instance footer.

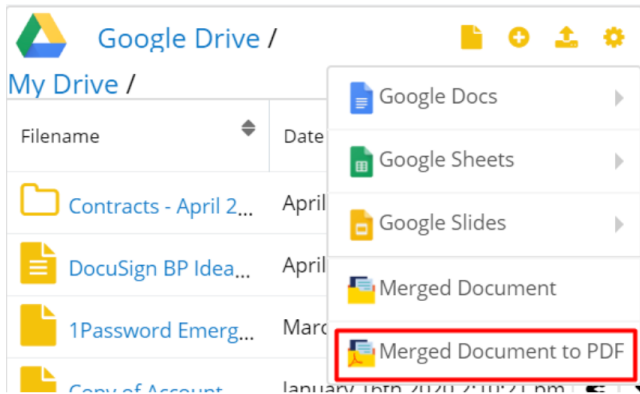


The merged document will also be available in the **Documents Subpanel** in **Record View** and in the **Google Drive Integration Dashlet**.

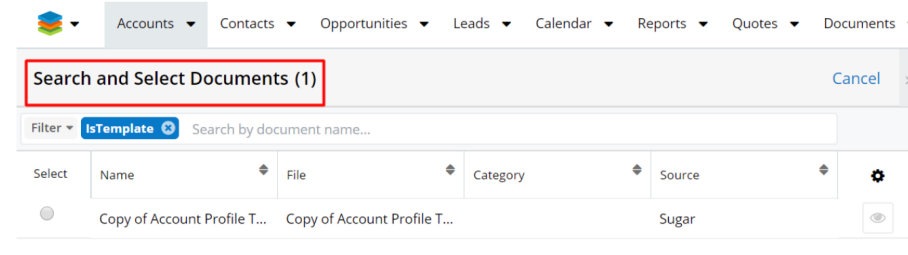


Merged Document to PDF

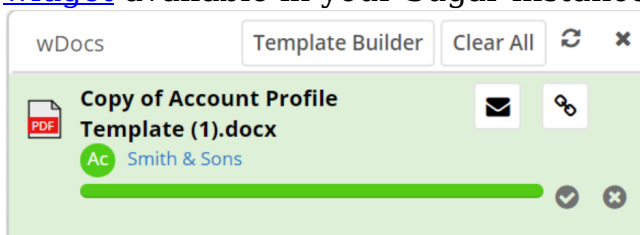
This action allows users to create new PDF documents based on a template. To merge documents to PDF files in **Record View** from the **Google Drive Integration Dashlet**, choose the Merged Document to PDF action from the dashlet header.



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 [wDocs widget](#) 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**.

Name	File	Category	Source	Status
Smith & Sons-Copy ...	Smith & Sons-Copy ...		Sugar	
Smith & Sons-Copy ...	Smith & Sons-Copy ...		Sugar	
Copy of Account Pr...	Copy of Account Pr...		Sugar	
DocuSign BP Ideas....	DocuSign BP Ideas....		Sugar	

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

Overview

Source: Sugar

File Name: Copy of Account Profile Template (1).docx

Document Name: Copy of Account Profile Template (1).c

Document Type:

Publish Date: 04/08/2020

Expiration Date:

Status: Active

Revision: 1

Template?:

Category:

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.

Copy of Account Profile Template.docx

Close

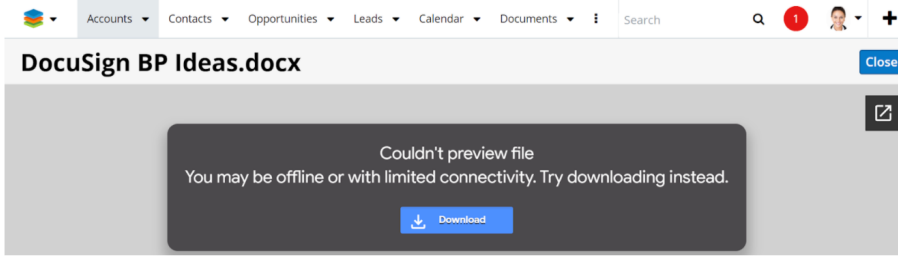
W-Systems
Account Name: {name}

General Details:

Location:	
City:	{billing_address_city}
Country:	{billing_address_country}
Postal:	{billing_address_postalcode}
State:	{billing_address_state}
Street:	{billing_address_street}

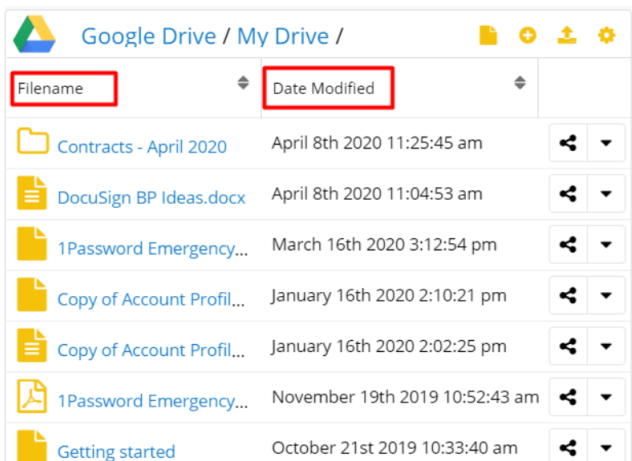
Page 1 / 4

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



Sort Files and Folders

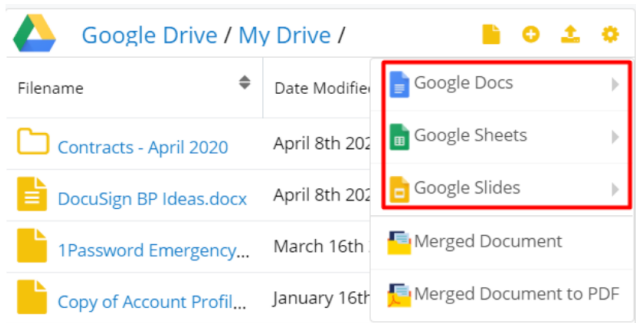
Users can sort files and folders in the **Google Drive Integration Dashlet** based on two variables: **Filename** and **Date Modified**.



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

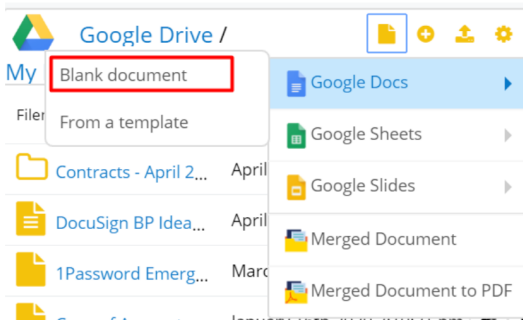
Create Google Docs Documents

This option is also available in the Google Drive Integration Dashlet header and it allows users to create documents using [blank documents](#) or [from templates](#) available in the Google Drive applications.

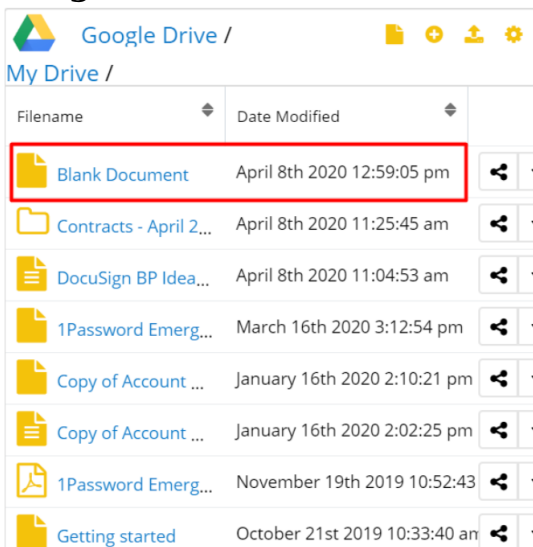


Create Document from Blank Document

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".

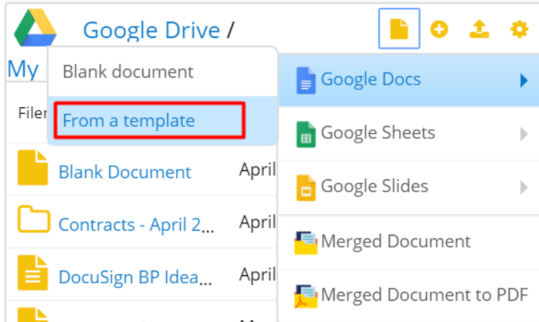


A new Google Docs document will open in your Google Drive web application. Once saved, the new document will be automatically saved to the **Google Drive Integration Dashlet**.

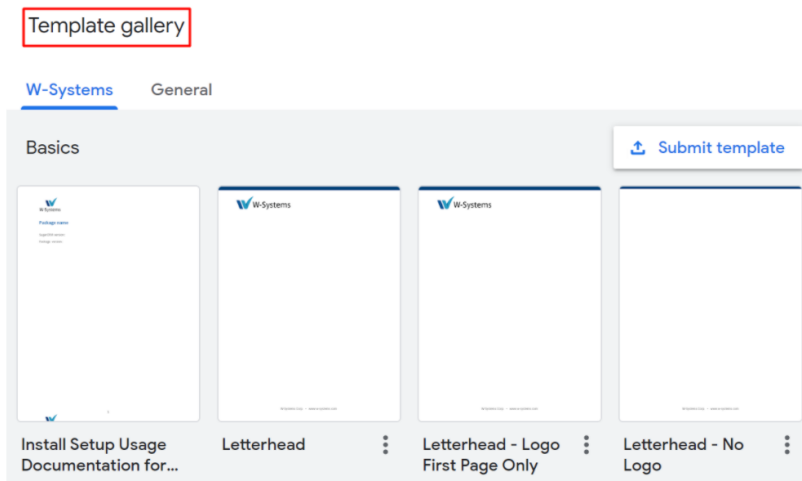


Create Document from Google Docs Template

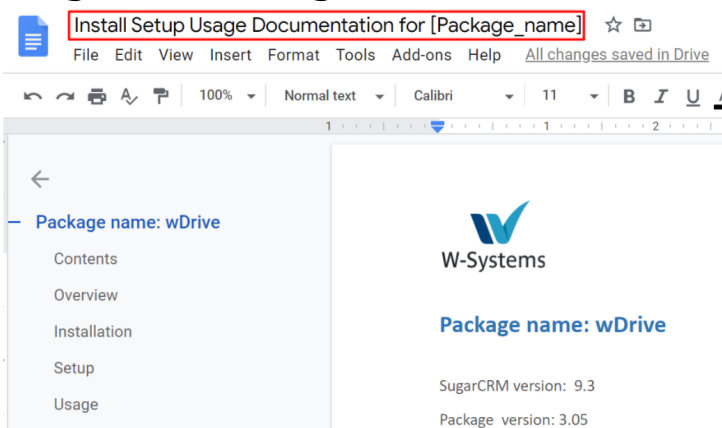
Users can create new Google Docs documents which will be automatically saved to their dashlets by using the **Merge from Template** action available in the Google Drive Integration Dashlet header.



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



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

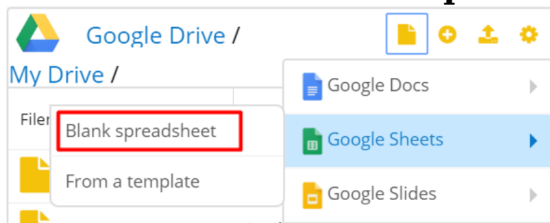


Create Google Sheets Spreadsheets

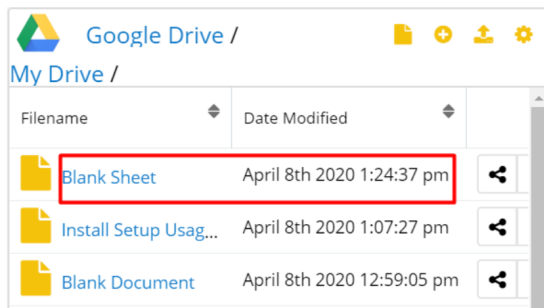
Users can create new Google Sheets spreadsheets which will be automatically saved to their dashlets by using the [Blank Document](#) or [From Template](#) actions available in the Google Drive Integration Dashlet header.

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

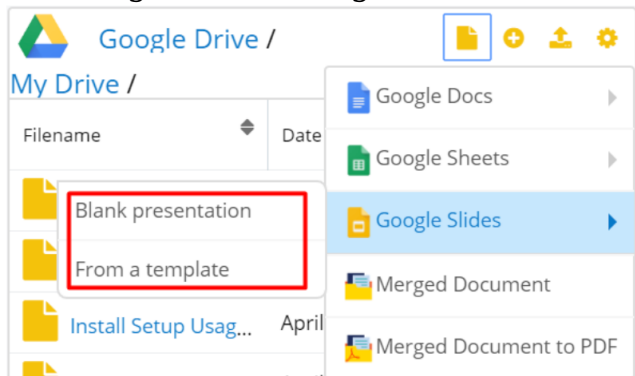
Users can create new Google Sheets spreadsheets which will be automatically saved to their dashlets by using the **From Template** action available in the Google Drive Integration Dashlet header.

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**.

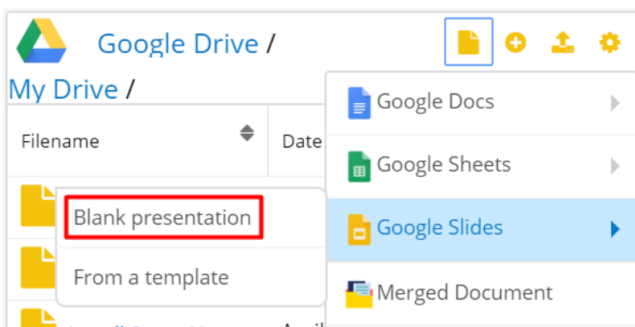
Create Google Slides

Users can create new Google Slides which will be automatically saved to their dashlets by using the [Blank Presentation](#) or the [From Template](#) actions available in the Google Drive Integration Dashlet header.

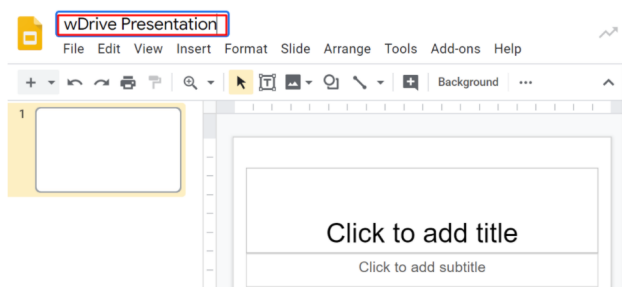


Create Google Slides from a Blank Presentation

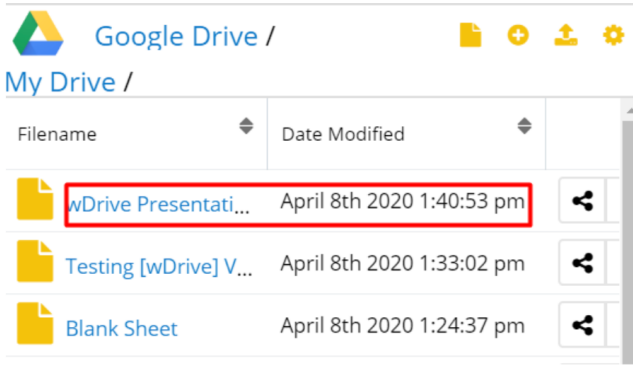
To create Google Slides from blank presentations, hover the cursor over the Google Slides option available in the Google Drive Integration Dashlet header and select Blank Presentation.



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

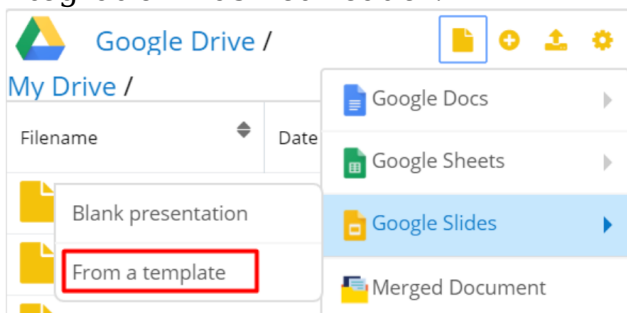


Once saved, the new presentation will be automatically saved to the Google Drive Integration Dashlet.

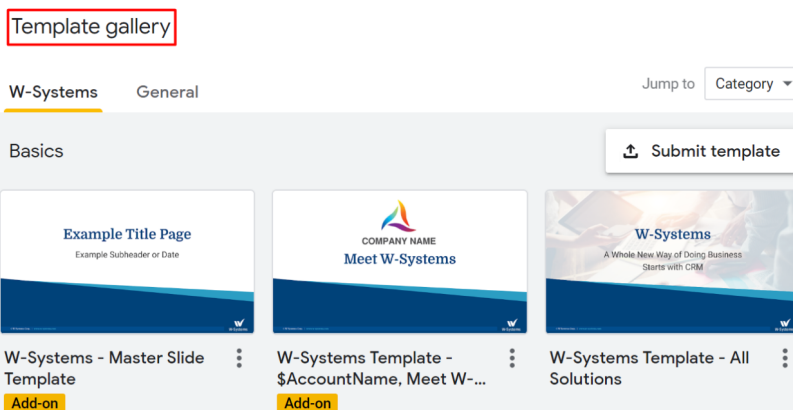


Create Google Slides from a Template

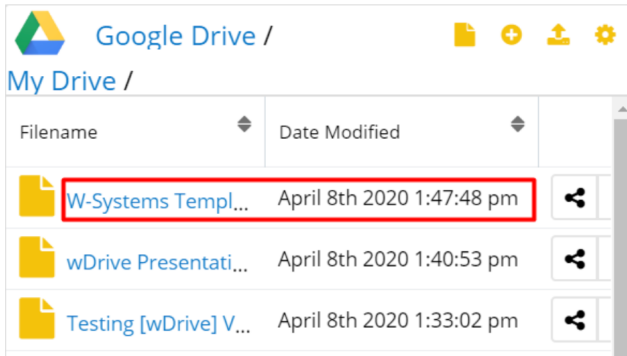
Users can create new Google Slides which will be automatically saved to their dashlets by using the From Template action available in the Google Drive Integration Dashlet header.



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



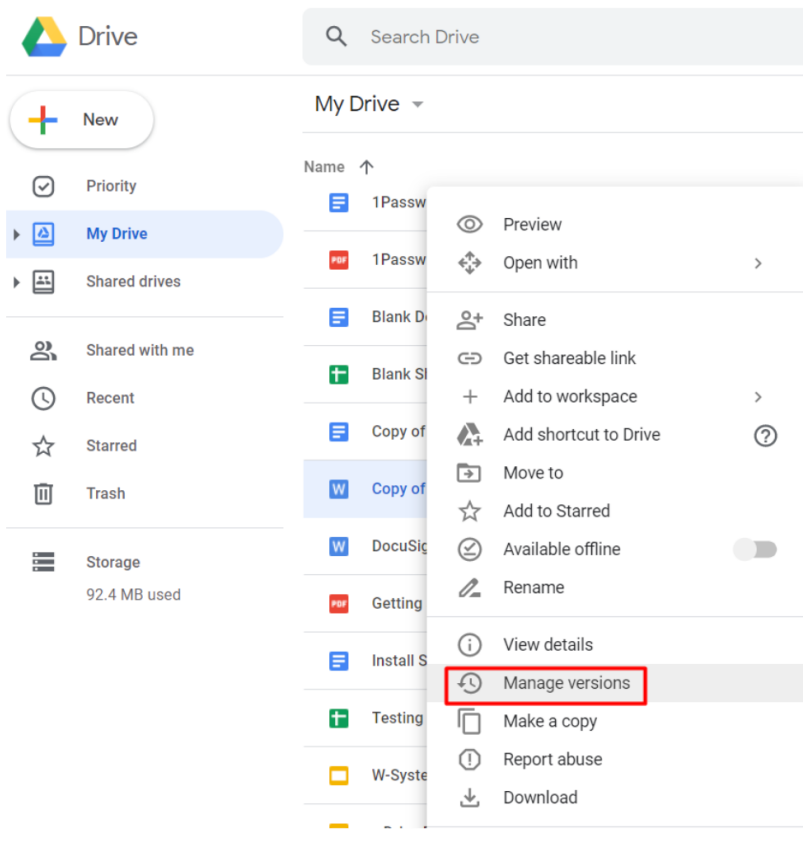
Select and edit your template. The final version will be automatically saved in your Google Drive Integration Dashlet and the Google Drive web application.



Google Drive 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.

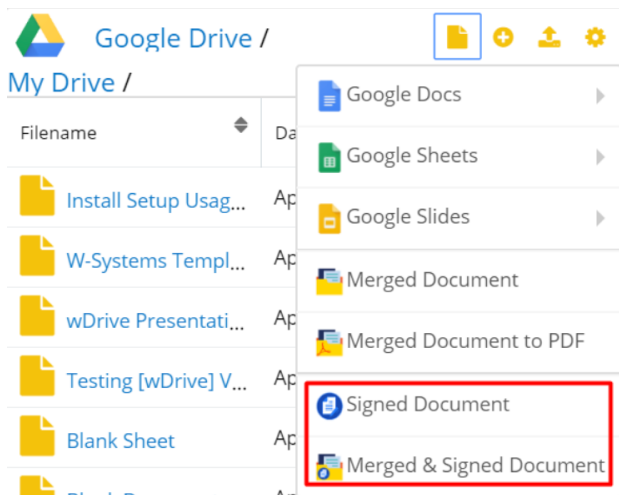
To verify file versions, go to your Google Drive web application and select the desired file. Right-click on it and choose **Manage Versions**.



Google Drive Integration with Sugar Connector to DocuSign

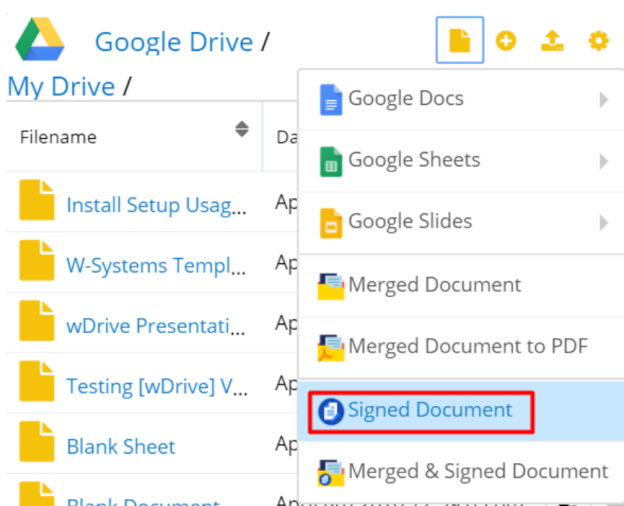
Sugar Connector to DocuSign users can send documents for signature straight from within the Google Drive Integration Dashlet. DocuSign users can sign or send for signature documents by using one of the two options available in the **Google Drive Integration header**:

- [Signed Document](#)
- [Merged & Signed Document](#)

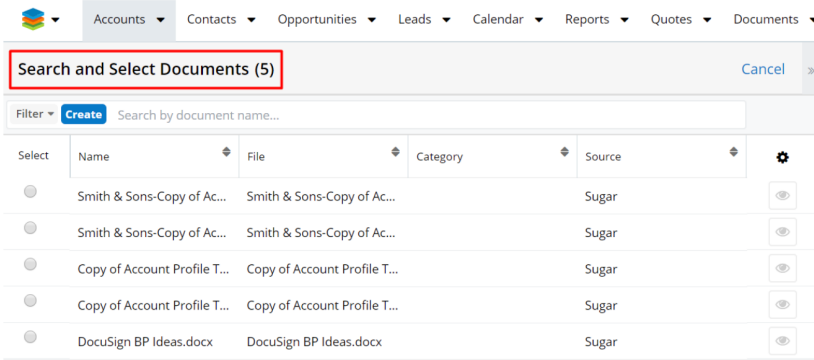


Signed Document

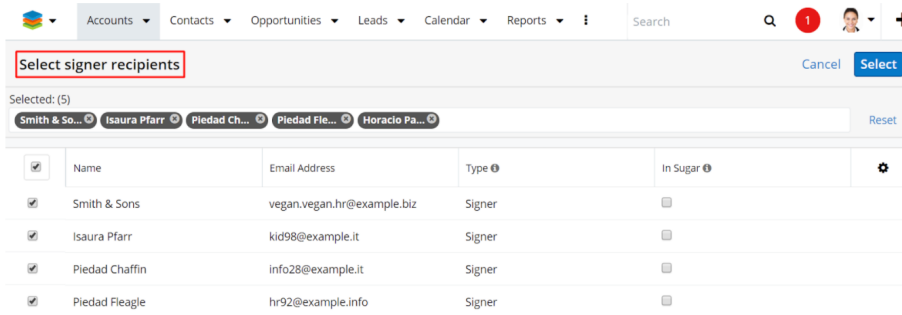
This action allows users to select a document from the Documents module and send it for signature.



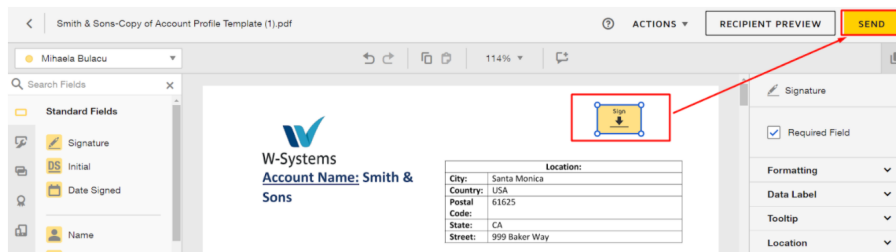
Clicking the **Signed Document** action will open the **Search and Select Documents** drawer from where users can select the document that will be signed or sent for signature.



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.).

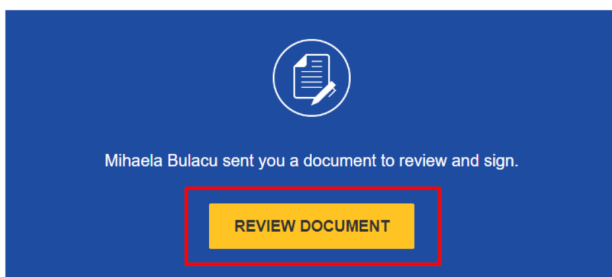


Once the recipient was selected, the users can select the fields needed for signature and send the document to recipients.



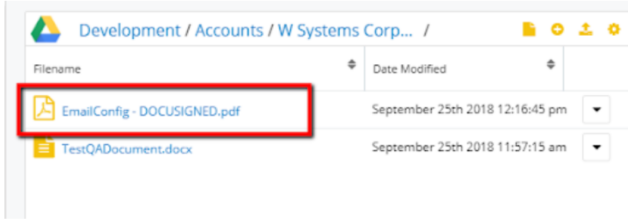
When the document is signed by all recipients, a confirmation email is sent and the document is added in dashlet.

DocuSign



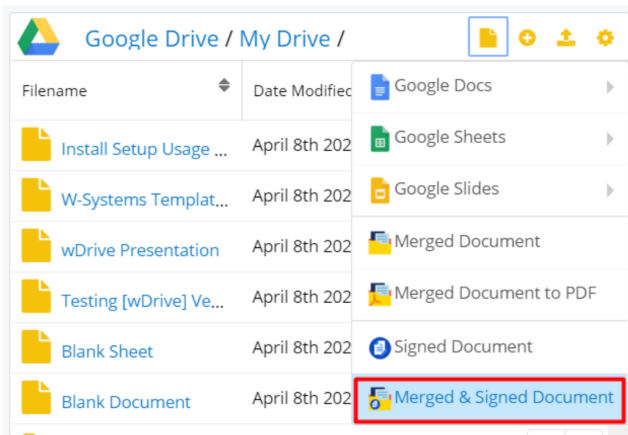
Mihaela Bulacu
mbulacu@w-systems.com

Mihaela Bulacu,

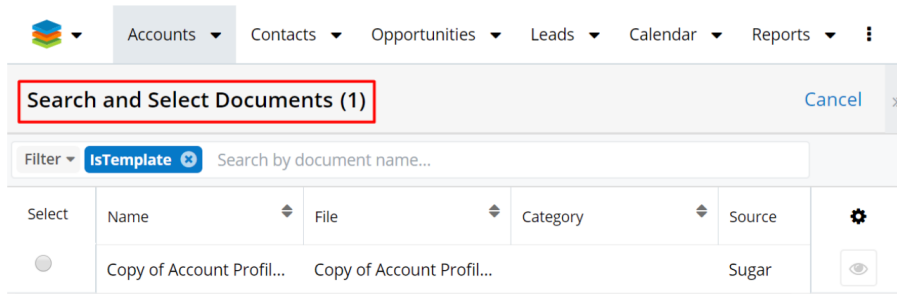


Merged & Signed Document

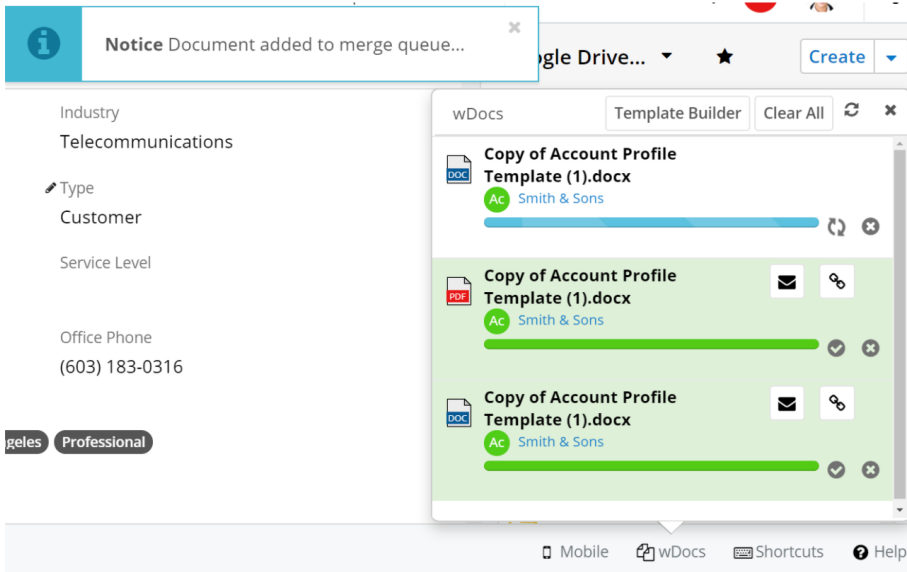
This action allows users to first merge documents with [wDocs](#) and then sign and send the merged documents for signature.



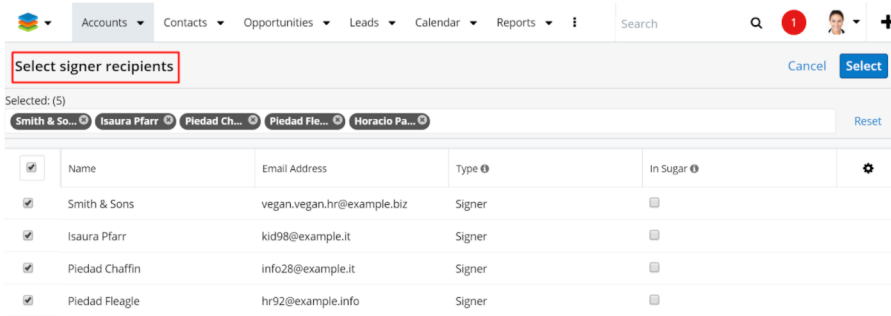
Clicking on this action will open the **Search and Select Documents** drawer where users can select the template to merge their documents.



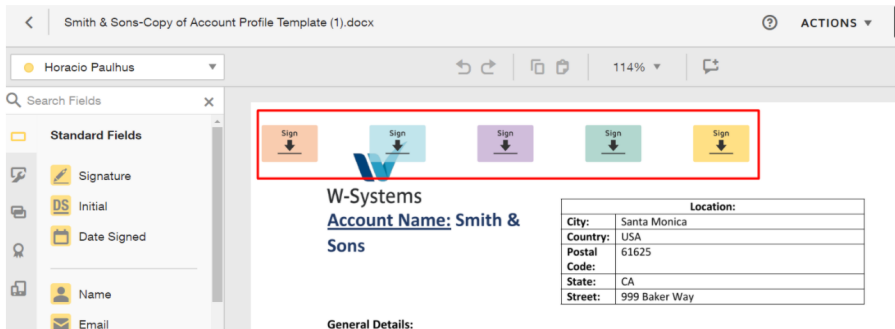
After selecting the document, it will be added to the **Merge Queue**.



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

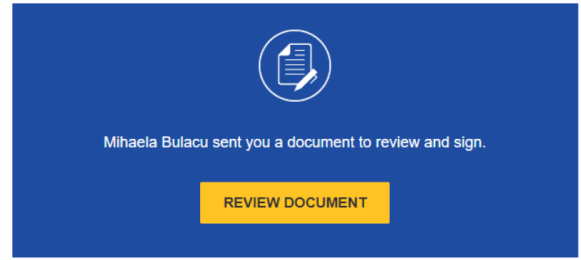


After selecting the recipients, a new DocuSign browser tab will open that allows the user to set the signature fields.



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

DocuSign



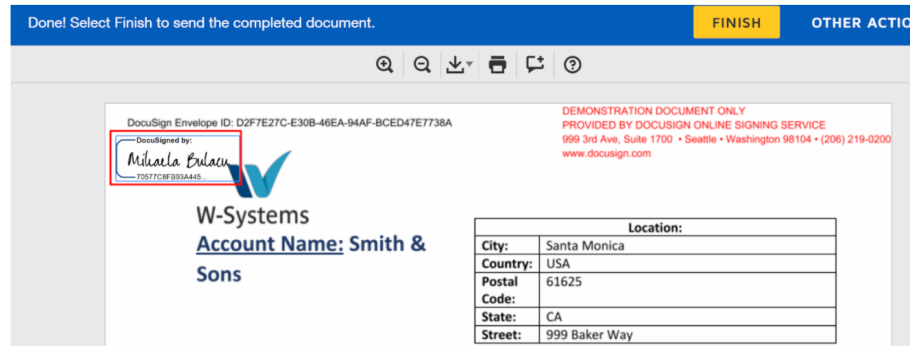
Mihaela Bulacu
mbulacu@w-systems.com

Mihaela Bulacu,

Please DocuSign Smith & Sons-Copy of Account Profile Template (1).docx

Thank You, Mihaela Bulacu

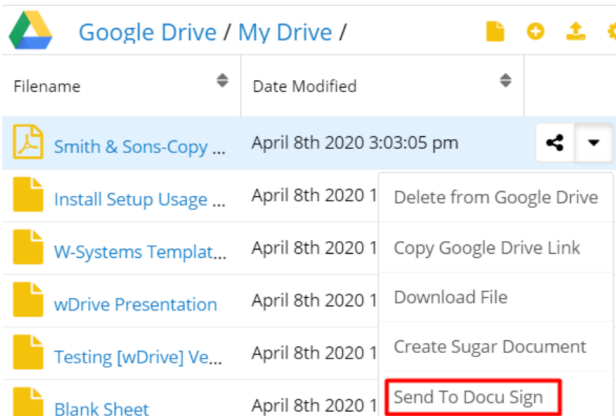
The document can be reviewed and signed by clicking on the **Review Document** button in the email.



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.

<input checked="" type="checkbox"/>	Name	Email Address	Type	In Sugar
<input checked="" type="checkbox"/>	Smith & Sons	vegan.vegan.hr@example.biz	Signer	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Mihaela Bulacu	mbulacu@w-systems.com	Signer	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Isaura Pfarr	kid98@example.it	Signer	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Piedad Chaffin	info28@example.it	Signer	<input type="checkbox"/>

OneDrive Integration

- [Define OneDrive Settings](#)
 - [OneDrive Integration Dashlet](#)
 - [OneDrive Integration with wDocs](#)
-
- [Revision Management](#)
 - [OneDrive Integration with Sugar Connector to DocuSign](#)

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

- Go to https://portal.azure.com/#blade/Microsoft_AAD_RegisteredApps/

Microsoft Azure Search resources, services, and docs (G+)

Home > App registrations

+ New registration | Endpoints | Troubleshooting | Download | Preview features | Got feedback?

Try out the new App registrations search preview! Click to enable the preview. →

Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure AD Graph. We will continue to provide technical support and security updates but we will no longer provide feature updates. Applications will need to be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. Learn more

All applications | **Owned applications** | Deleted applications (Preview)

Start typing a name or Application ID to filter these results

- 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)
- 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 wsystems_0407_mihaela/custom/onedrive_authentication_redirect.htm ✓

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

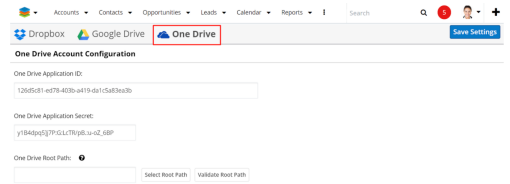
After installing the **wDrive** package to a Sugar Instance, a new section will be added on the **Administration** page: the **wDrive Settings** section. To define your settings for the **OneDrive application** access the **Settings Configuration** link.

wDrive

Configure Product Settings and API Credentials

 Settings	Set up API credentials, default root paths, starting paths for Dropbox, Google Drive, One Drive.
--	--

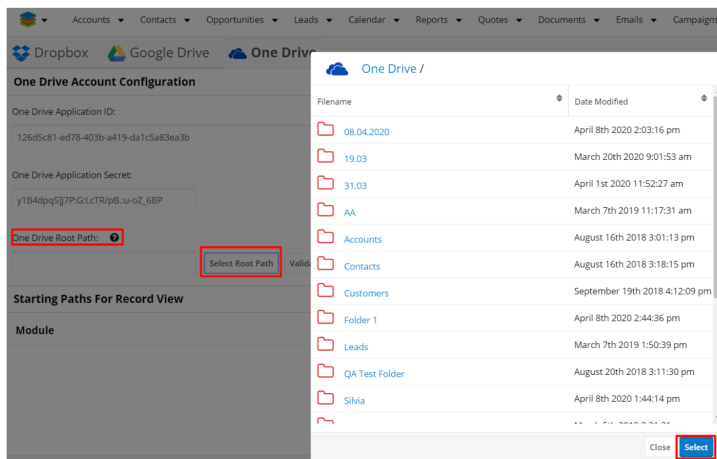
This will take you to another page where you can configure the **OneDrive Dashlet**. Select the **OneDrive tab** on the new page.



Here, users can configure the following:

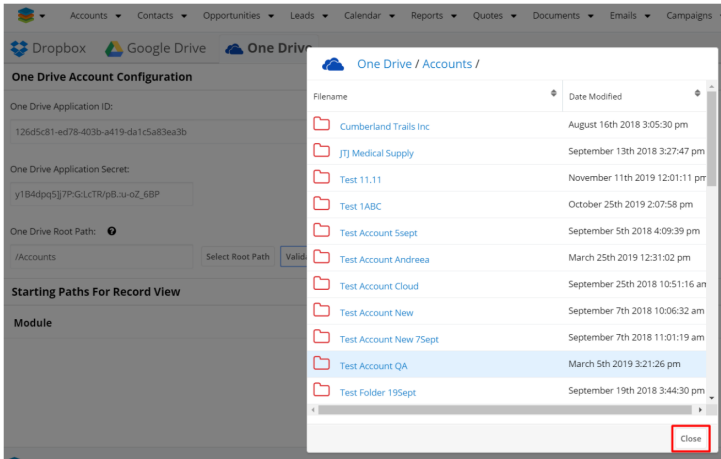
- **OneDrive Application ID:** Users need to add the Client ID generated by the Web Application
- **OneDrive Application Secret:** Users need to add the Client secret key generated after pressing the "Generate Password" button.
- **OneDrive root path:** Users need to add the default starting path for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



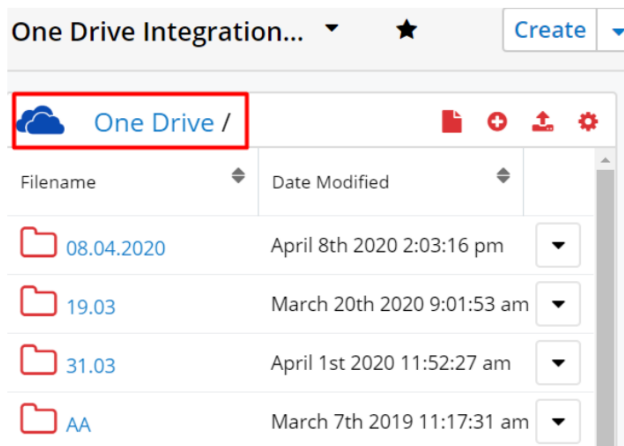
Choose the Folder that will be defined as the root path in the OneDrive Integration Dashlet and press **Select**.

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**.

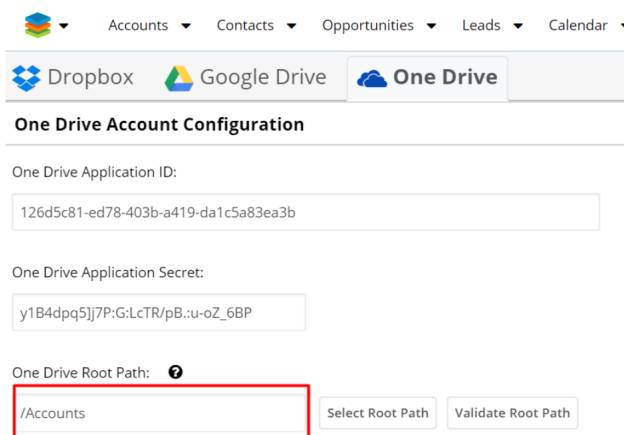


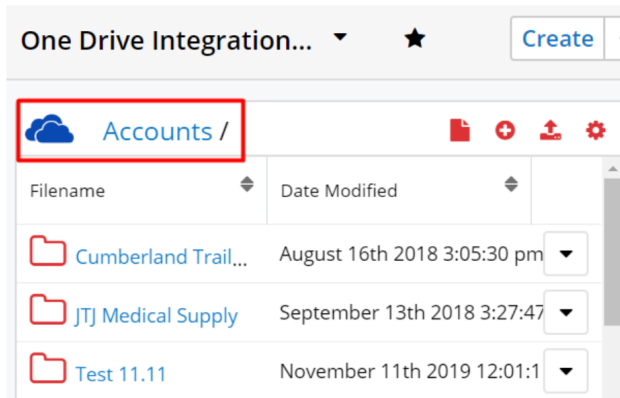
Users can add or not root paths to the OneDrive Integration Dashlet, depending on their needs.

1. The OneDrive Dashlet without a Root Path Defined



2. The OneDrive Dashlet with a Root Path Defined



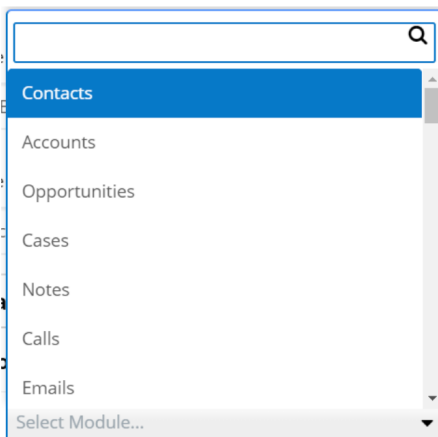


Starting Path for Record View

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**.

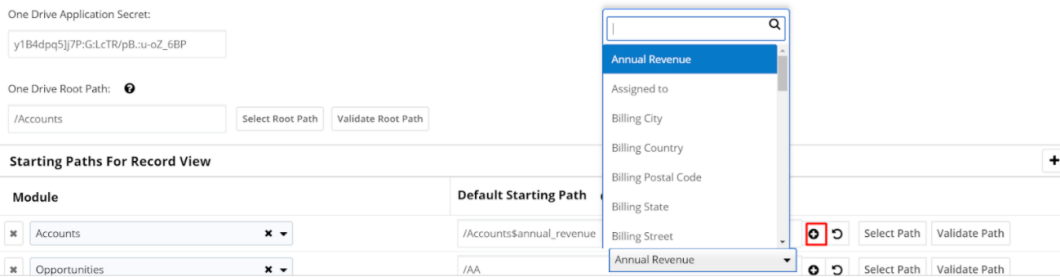


- **Module:** is a dropdown field where users can choose the module for which the starting path will be defined.



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

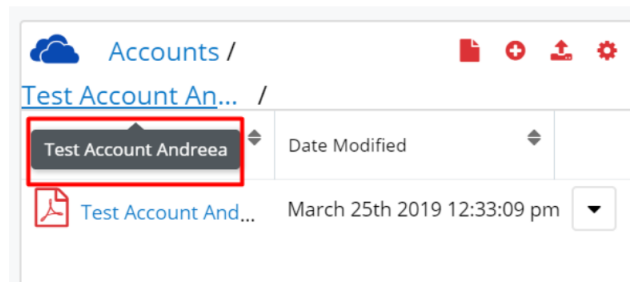
For example, for the **Accounts** module, in Record View, the name of the assigned user will be displayed by default. Users can configure which path will be added by clicking on the (+) button next to the **Starting Path** field. This will provide them with a number of options depending on which they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



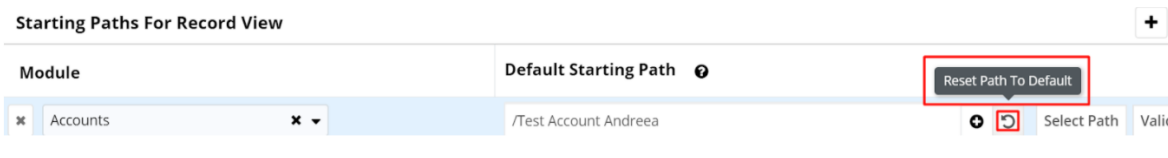
After the option is selected, press on the **Select Path** button and choose the desired OneDrive Default path for the module of choice. Click on **Validate Path** to validate it. If the chosen path is correct, a dialog box with the path's contents will open. Click **Close**.



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



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



Note: Paths that contain variables cannot be validated.

OneDrive Integration Dashlet

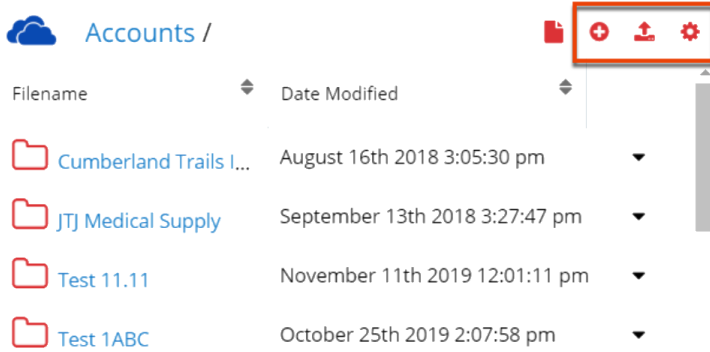
With the OneDrive Integration Dashlet, users have access to paths, folders and files shared in the OneDrive application. To use the OneDrive Integration Dashlet, sign in from the dashlet using the OneDrive account credentials used for the web application.

Dashlet Options

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

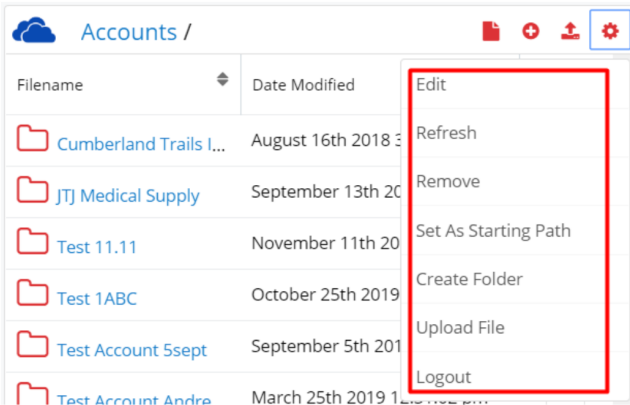
- View contents of the shared folders.
- Path overflow: It will appear if the path from folder to folder naming will overflow.

Users will also be able to perform the following actions.



- **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:



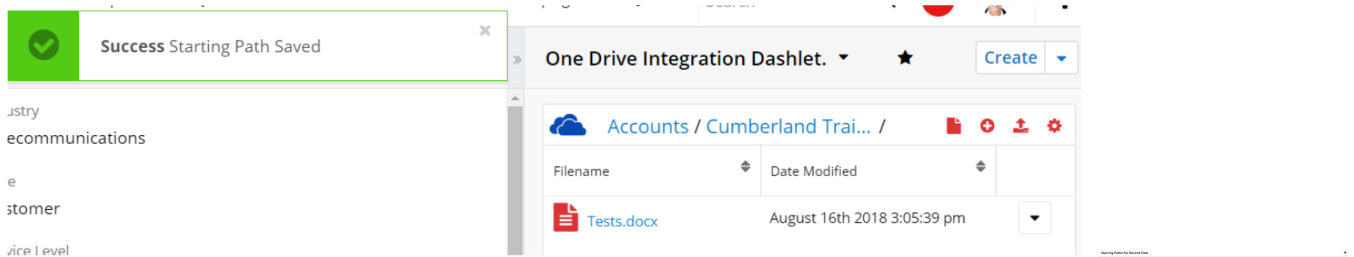
- **Edit:** this option allows users to edit their dashlet.
- **Refresh:** this option allows users to refresh the dashlet.
- **Remove:** this option allows users to remove the dashlet.
- **Set As Starting Path:** this option allows users to set a new starting path, different from the one defined on 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.

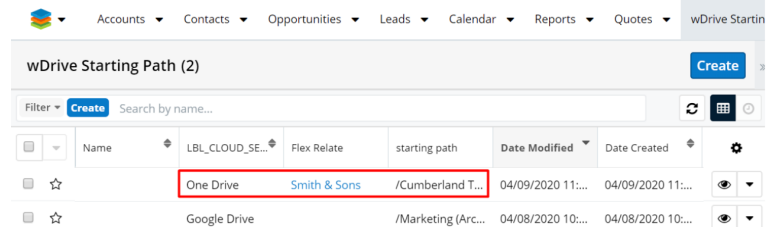
Upload File: allows users to upload files. This option is similar to the Upload File option available in the dashlet header. The user is able to upload several files at once, by dragging them to the OneDrive dashlet.

- **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.



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.



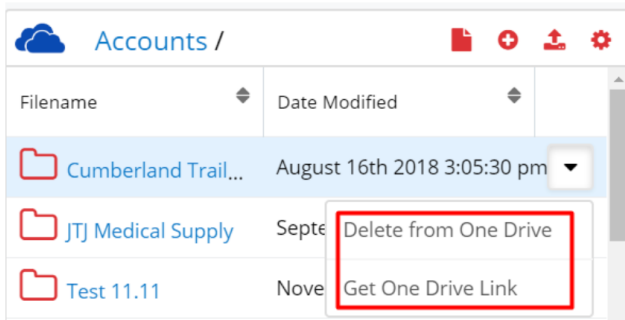
Once all records are removed from the **wDrive Starting Path** module, all records in record view will have the starting path defined in **Administration**.

File and Folder Actions

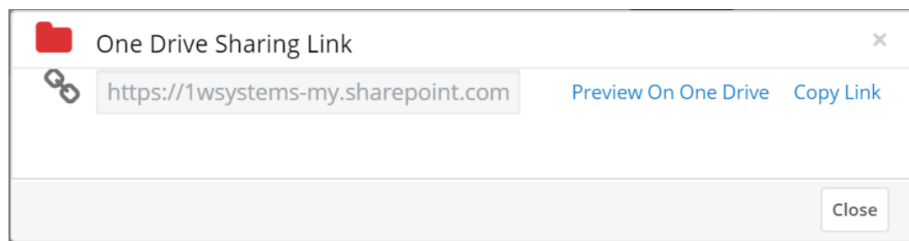
OneDrive Integration Dashlet users can perform different actions for the files and folders shared in the dashlet.

Folder Actions

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

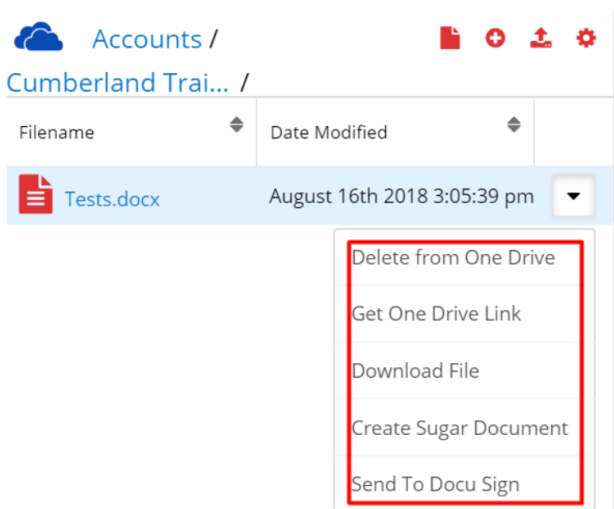


- **Delete from OneDrive:** This allows users to delete folders directly from within the OneDrive dashlet. The folders deleted using this action will also be deleted from the OneDrive web and desktop applications.
- **Copy OneDrive Link:** This action allows users to copy the folder's OneDrive link to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

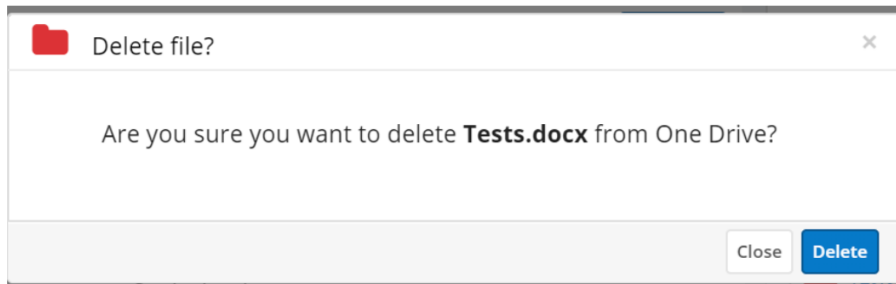


File Actions

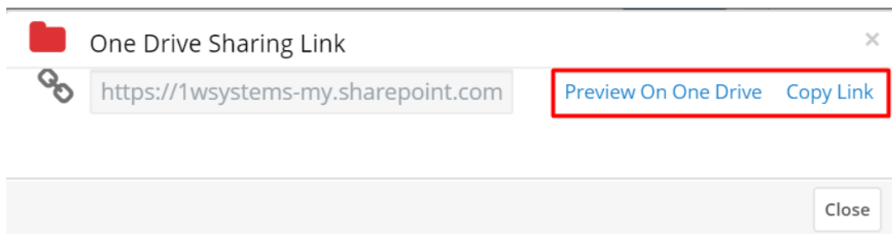
In the Actions Menu of each file shared in the OneDrive Sugar application are available multiple actions



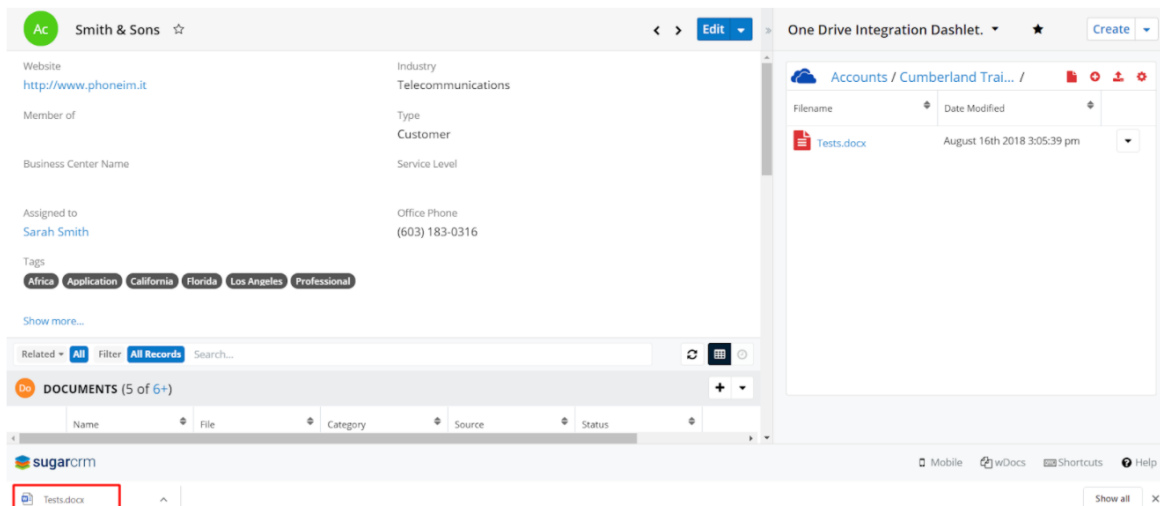
- **Delete from OneDrive:** This action allows users to delete files directly from their OneDrive dashlet. The following message will be raised when the action is pressed.



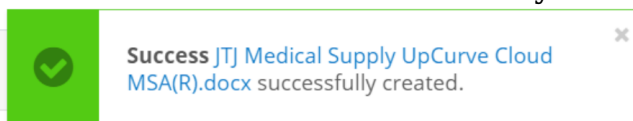
- **Get OneDrive Link:** This action allows users to copy the folder's OneDrive link to their clipboard. It also allows users to preview the contents of the folder in the OneDrive web application.



- **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.



- **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

Document Name	File Name	Source	Category	Sub Category	Revision Date
JTJ Medical Supply UpCurve Cloud MSA(R).docx	JTJ Medical Supply UpCurve Cloud MSA(R).docx	Sugar			04/09/2020 09:13am
Smith & Sons-Copy of Account Profile Template (1) - DOCUSIGNED.pdf	Smith & Sons-Copy of Account Profile Template (1) - DOCUSIGNED.pdf	Sugar			04/08/2020 12:09pm

Documents created with this action will also be saved to the **Documents Subpanel in Record View:**

Name	File	Category	Source	Status
JTJ Medical Supply ...	JTJ Medical Supply ...		Sugar	
Smith & Sons-Copy ...	Smith & Sons-Copy ...		Sugar	
Smith & Sons-Copy ...	Smith & Sons-Copy ...		Sugar	
Smith & Sons-Copy ...	Smith & Sons-Copy ...		Sugar	
Smith & Sons-Copy ...	Smith & Sons-Copy ...		Sugar	

- **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.

Name	File	Category	Source	Status
Tests.docx	Tests.docx		Sugar	
JTJ Medical Supply ...	JTJ Medical Supply ...		Sugar	
Smith & Sons-Copy ...	Smith & Sons-Copy ...		Sugar	
Smith & Sons-Copy ...	Smith & Sons-Copy ...		Sugar	
Smith & Sons-Copy ...	Smith & Sons-Copy ...		Sugar	

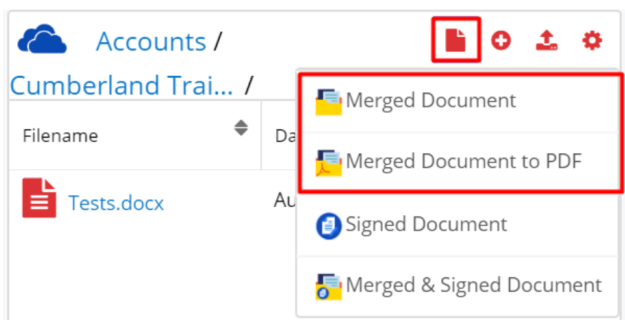
Users also have the option to mass synchronize all the documents in the **Documents subpanel** with the OneDrive Integration Dashlet with the **Sync All Documents to OneDrive** action from the **subpanel's Action Menu**.

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

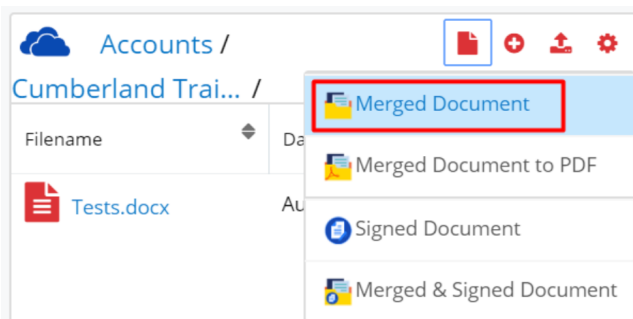
[wDocs](#) users can merge documents to Microsoft Word documents or PDF files from a template, directly from within the OneDrive Integration Dashlet. Users have two merging options available from the dashlet:

- [Merged Document](#)
- [Merged Document to PDF](#)

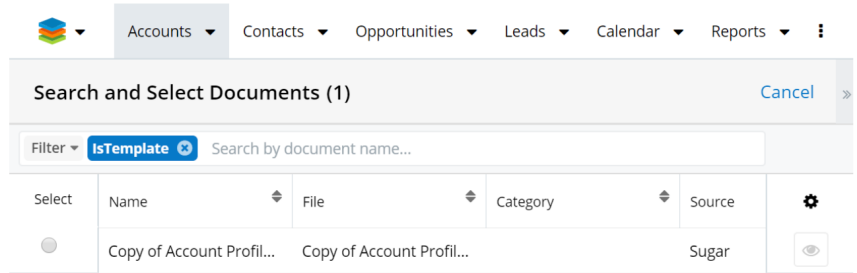


Merged Document

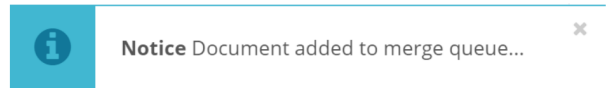
This action allows users to merge record data with a template, resulting in a new word document.



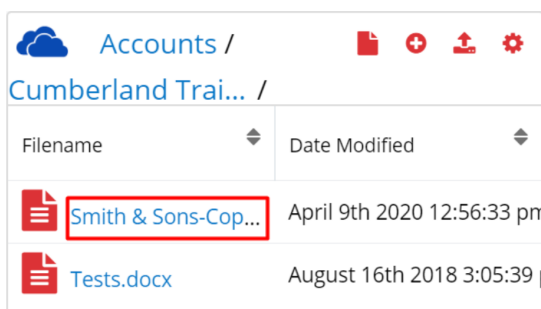
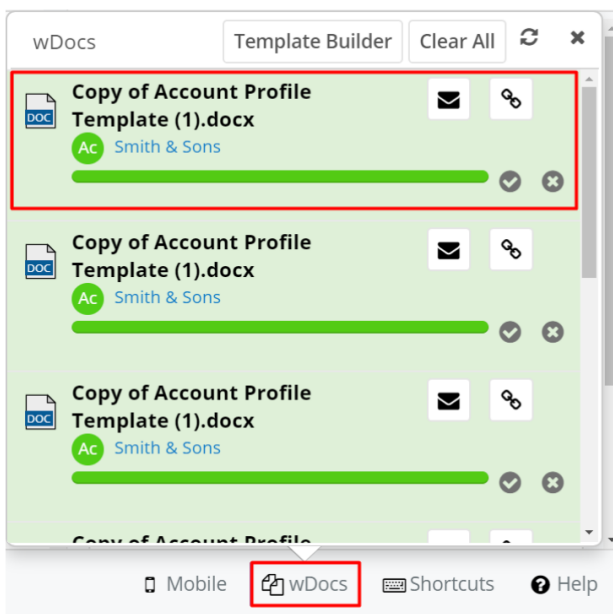
Once the **Merged Document** action is pressed, the **Search and Select Documents** drawer will open.

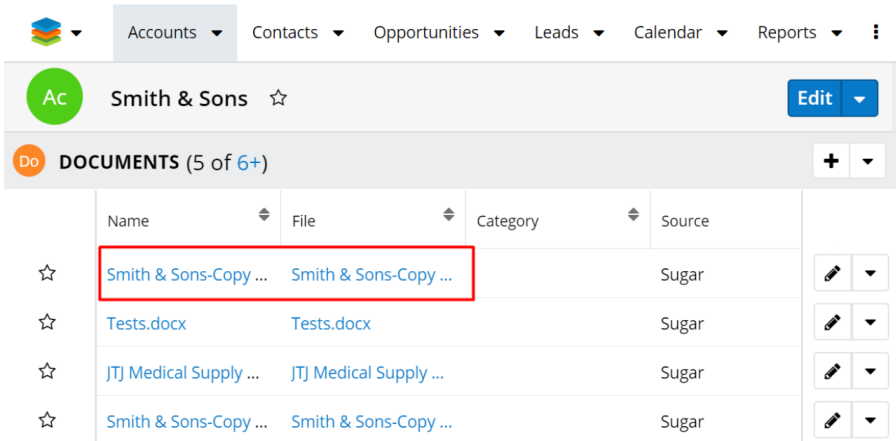


Select the template where you want the merge to occur. Once you do so, the document will be added to the **Merge Queue**.



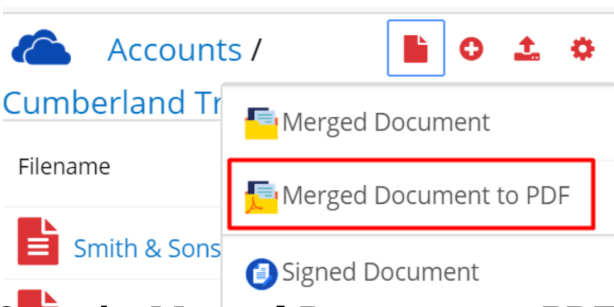
After the document is successfully merged, it will be available in the [wDocs widget](#) in Sugar's footer, on the **OneDrive Integration Dashlet** and in the **Document subpanel in Record View**.



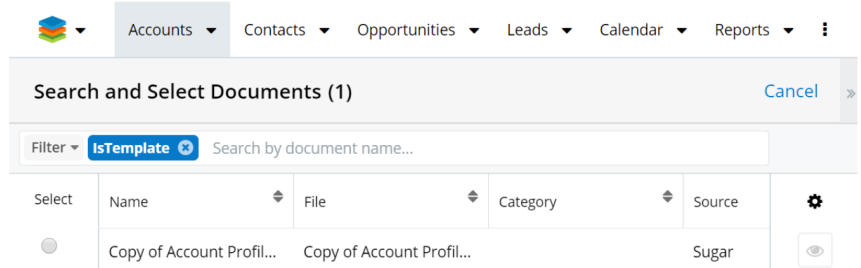


Merged Document to PDF

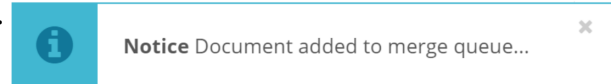
This action allows users to merge record data with templates to PDF files.



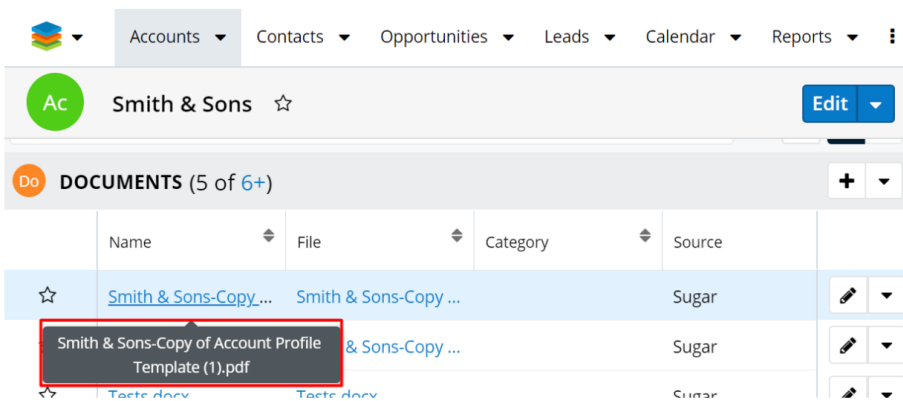
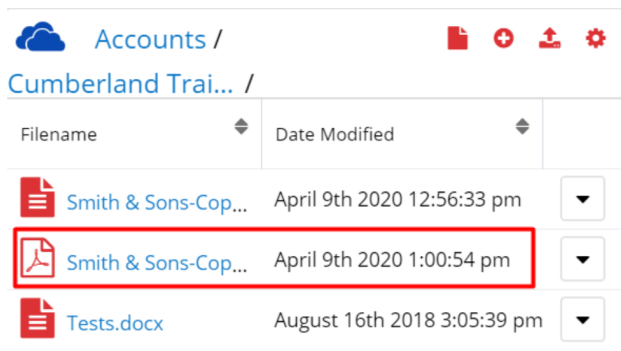
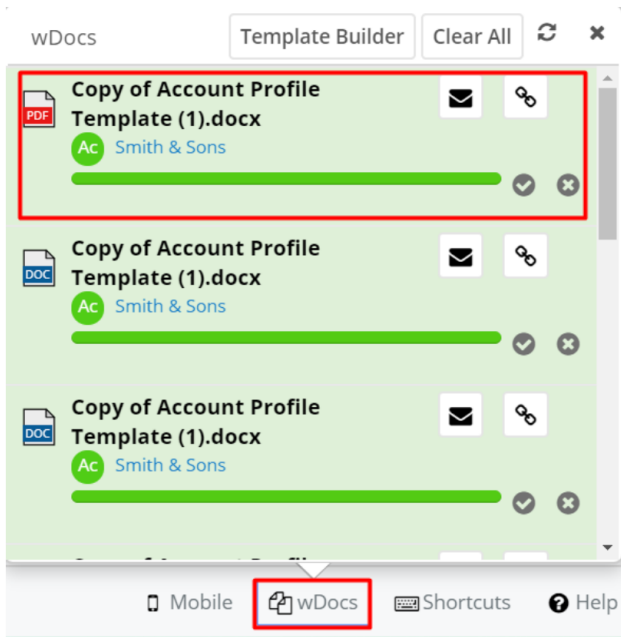
Once the **Merged Document to PDF** action is pressed, the **Search and Select Documents** drawer will open.



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

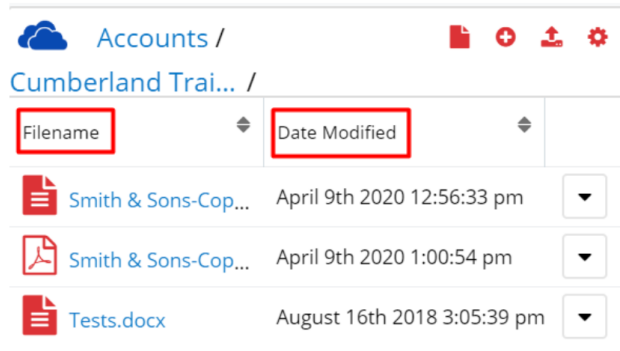


After the document is successfully merged, it will be available in the [wDocs widget](#) in Sugar's footer, on the **OneDrive Integration Dashlet** and in the **Document subpanel in Record View**.



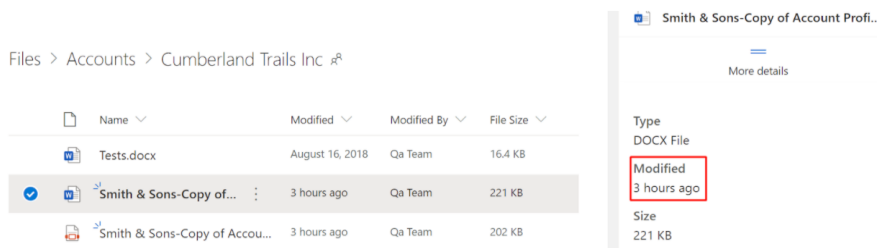
Sort Files and Folders

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

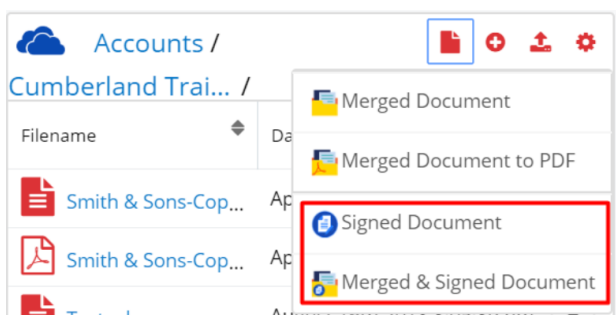
When uploading files, users can follow the version revisions for each file. Go to the OneDrive web application in the desired folder and right-click on a file in the folder. Choose Details and in the right-side panel will be the last date when the file was modified.



OneDrive Integration with Sugar Connector to DocuSign

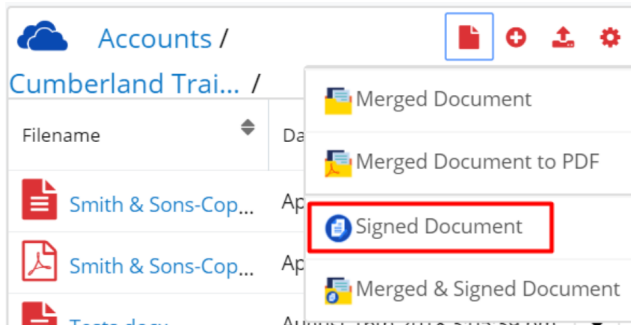
Sugar Connector to DocuSign users can sign and send signature documents directly from within the OneDrive Integration Dashlet. The OneDrive Integration Dashlet allows users to manage this through the following Actions available in the dashlet's header:

- [Signed Document](#)
- [Merged & Signed Document](#)

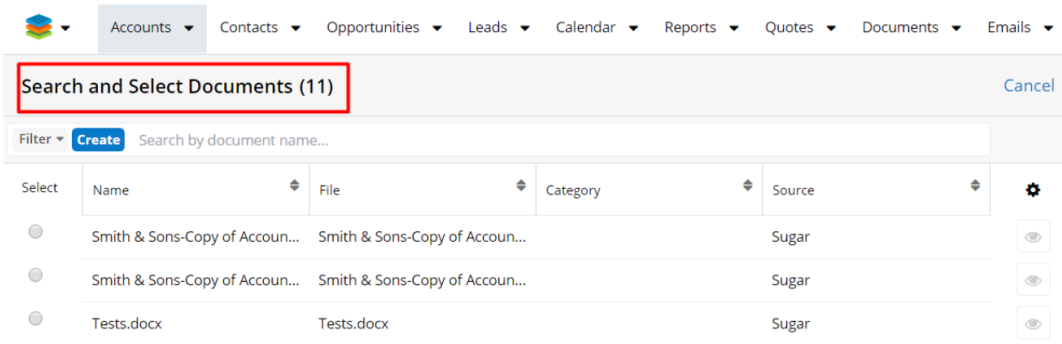


Signed Document

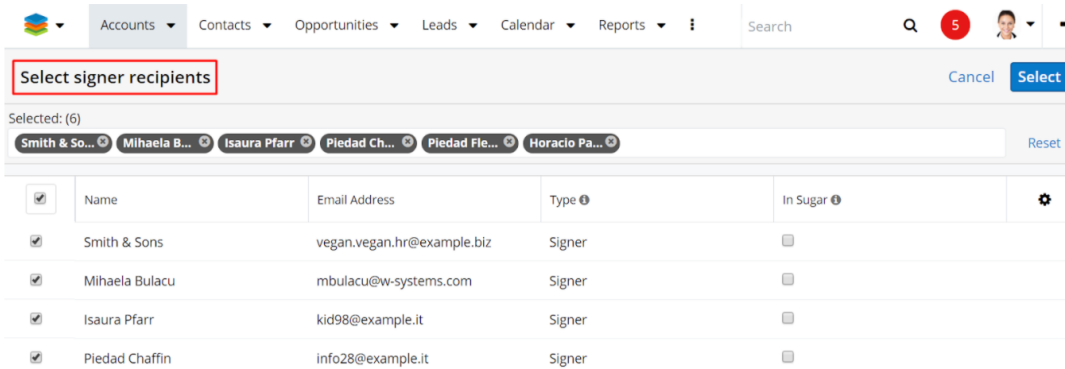
This action allows users to select documents from the **Documents module**, sign and send those for signature. Click on the Signed Document action in the dashlet header action menu.



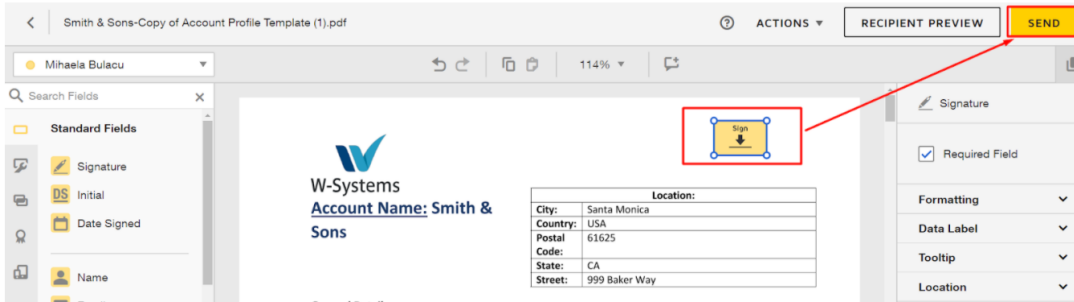
After selecting the **Signed Document** from the menu, the **Search and Select Documents** drawer will open. Choose the document you want to sign and send it for signature.



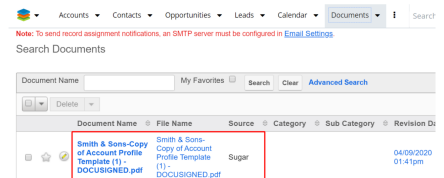
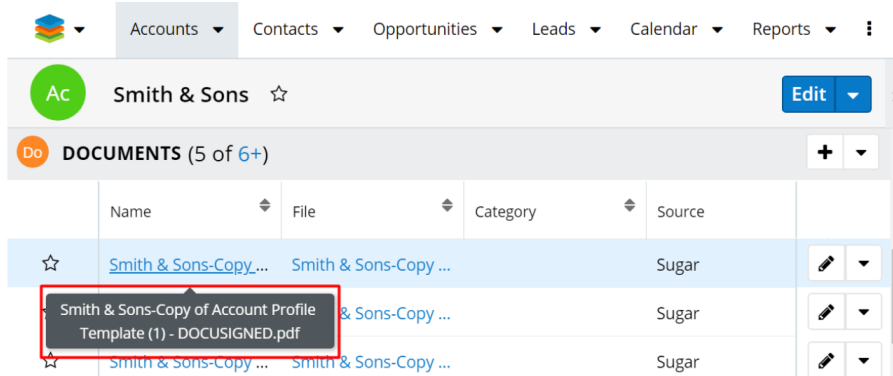
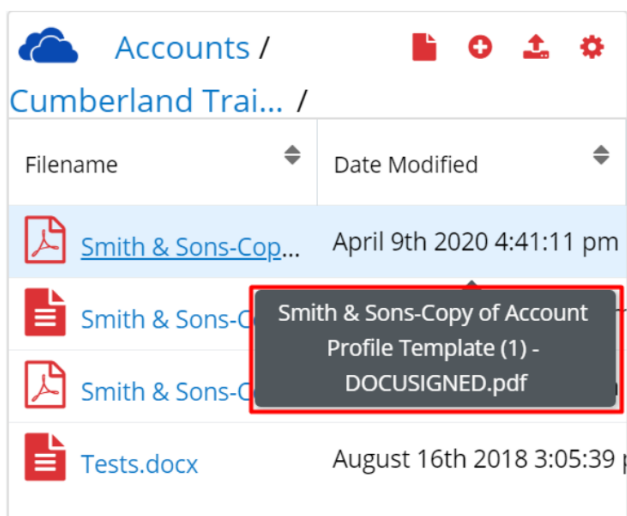
After selecting the document, the **Select Signer Recipients** drawer will open. Select which contact associated with the account you want to sign the document and press **Select**.



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**.



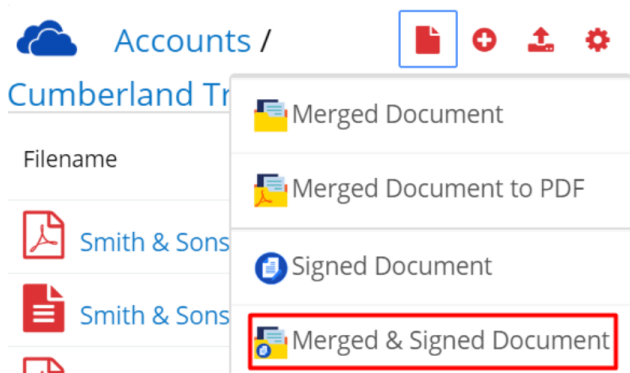
After the recipient signs the document and a confirmation email is sent on the user's email address, the signed document will appear in the **OneDrive Integration Dashlet**, in the **Documents subpanel**, and in the **Documents module**.



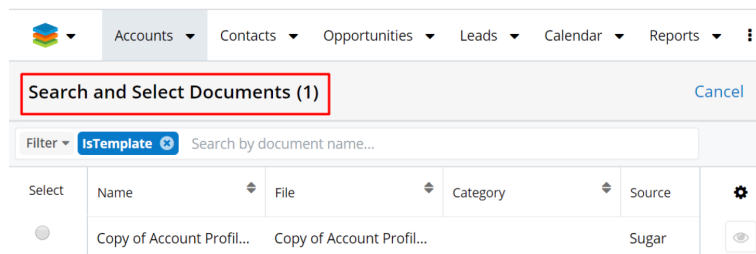
Merged and Signed Document

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

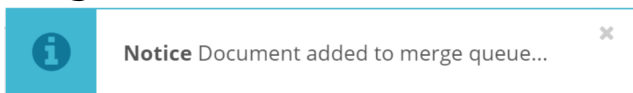
both [wDocs](#) and [Sugar Connector to DocuSign](#) users. This function allows users to first Merge their documents with wDocs and then sign and send documents for signature with Sugar Connector to DocuSign.



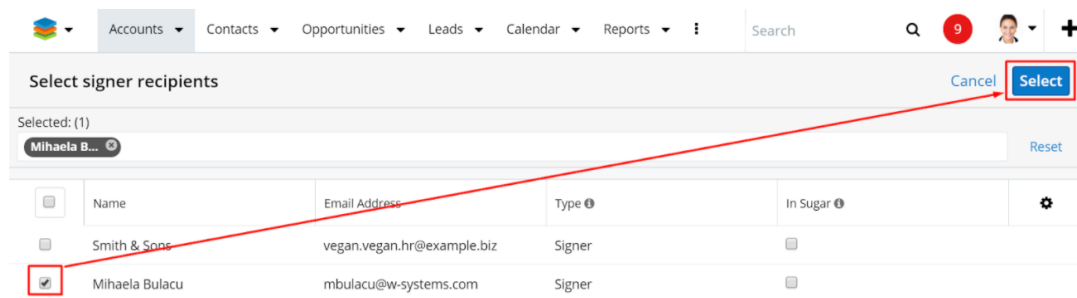
Once the **Merged & Signed Document** option is selected, the **Search and Select Documents** drawer is open.



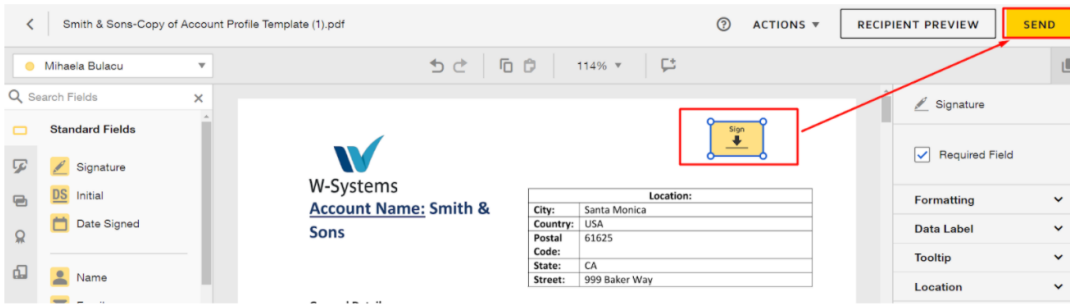
After selecting the template where the merge to occur from, it is added to the **Merge Queue**.



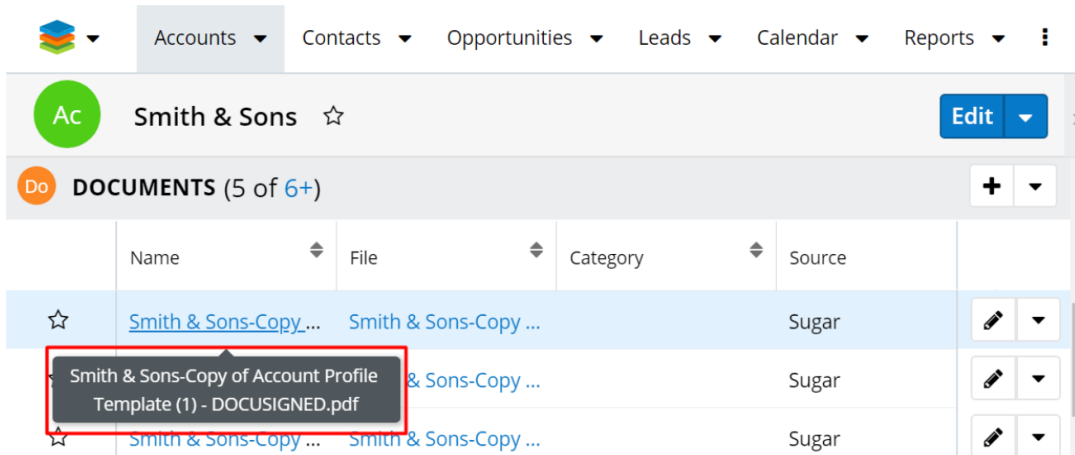
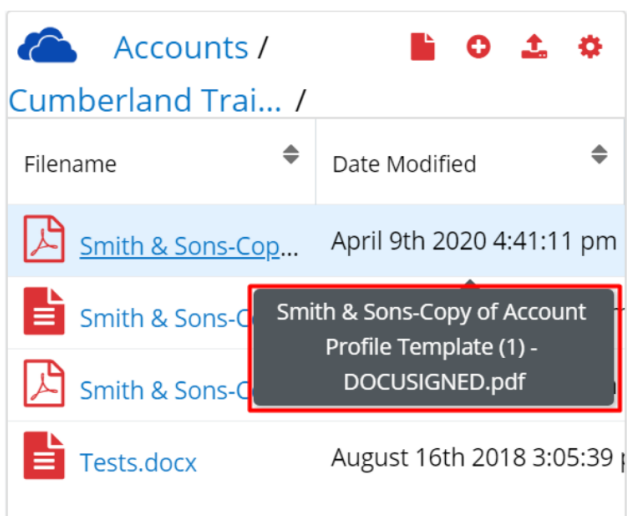
Once the merge is successful, the merged document will appear in the [wDocs widget](#) in the footer and the **Select signer recipients drawer** is automatically opened.

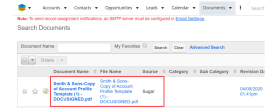


Select the desired signer recipient. A preview of the document will open in a new browser tab. Here users need to set the placement of the recipients' signature. After setting the signature placement, press **Send**.



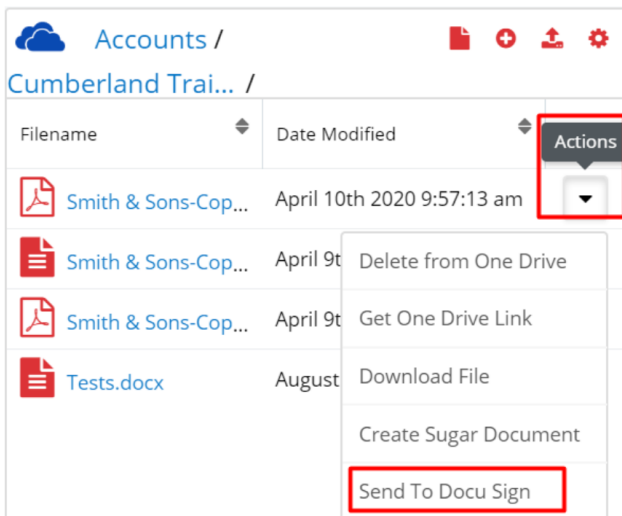
After the recipient signs the document and a confirmation email is sent on the user's email address, the signed document will appear in the **OneDrive Integration Dashlet**, in the **Documents subpanel**, and in the **Documents module**.



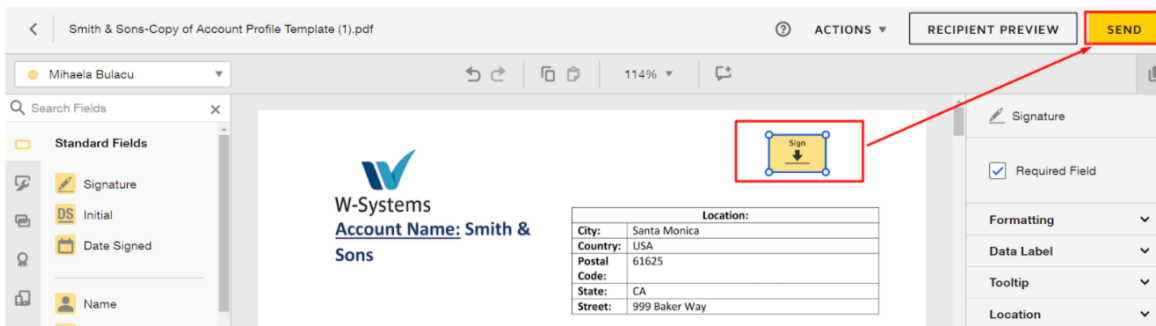


Send to DocuSign

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, a list of recipients is opened. Select the 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**.



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**.

Accounts / Cumberland Trai... /

Filename	Date Modified
 Smith & Sons-Cop...	April 9th 2020 4:41:11 pm
 Smith & Sons-C	Smith & Sons-Copy of Account Profile Template (1) - DOCUSIGNED.pdf
 Smith & Sons-C	
 Tests.docx	August 16th 2018 3:05:39

Accounts | Contacts | Opportunities | Leads | Calendar | Reports

Ac **Smith & Sons** ☆ Edit

DOCUMENTS (5 of 6+)

Name	File	Category	Source
☆ Smith & Sons-Copy...	Smith & Sons-Copy ...		Sugar
☆ Smith & Sons-Copy of Account Profile Template (1) - DOCUSIGNED.pdf	Smith & Sons-Copy ...		Sugar
☆ Smith & Sons-Copy ...	Smith & Sons-Copy ...		Sugar

Search Documents

Document Name	File Name	Source	Sub Category	Revised On
Smith & Sons-Copy of Account Profile Template (1) - DOCUSIGNED.pdf	Smith & Sons-Copy of Account Profile Template (1) - DOCUSIGNED.pdf	Sugar		

Last Modified: 2021-12-07 03:48:56