Hint Installation and Administration Guide

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Hint Installation and Administration Guide

Overview

Sugar Hint is a relationship intelligence service that is available to be purchased and installed on your Sugar instance to make external information available for your contacts, leads, and accounts in Sugar. Data such as social media accounts, work information, and company details are visible for contacts and leads based on their email address and for accounts based on their websites and company names. Users can also quickly import the enriched data into the Sugar database with a single click.

This guide walks through the steps for Sugar 11.0 and lower to <u>install</u> Hint in an on-site Sugar instance as well as how to <u>uninstall</u> the package. For Sugar 12.0 and higher, Hint is built-in to Sugar and enabled via license key. This guide also outlines how an admin can <u>configure</u> Hint to suit their organization. For information on using Hint once it has been installed, please refer to the <u>Hint User Guide</u>.

Note: If you have Sugar Sell Premier, Hint powers the data enrichment and news feed capability. Hint is automatically enabled and there is not a separate license key for Hint.

Prerequisites

Sugar Hint is included with Sugar Sell Premier and enables the data enrichment and news feed capability. Sugar Hint can also be purchased as an add-on for Sugar Sell Advanced, Enterprise, and Serve. Please contact your <u>Sugar partner</u> or representative to learn more.

Built-in Hint

Hint 6.0.0 and higher is built in to Sugar's codebase and enabled via license key if it is purchased as an add-on (Sugar Sell Premier users have Hint automatically enabled). An admin must input the license key and assign the "Hint" License Type to users who should have access to Hint features.

- You must be an administrator to assign Hint licenses to users.
- Cron must be enabled because Hint relies on several scheduled jobs to function.
- Your Sugar instance must be upgraded to Sugar 12.0 or higher to use the built-in version of Hint.

- If your Sugar instance is not SugarIdentity-enabled and you want your service region to be Europe or Asia/Pacific, you must <u>specify the Hint</u> <u>services region</u> before you install or upgrade to Sugar 12.0 or higher. The default service region is the United States.
- If your server has firewalls set up that block direct access to the internet, you must add the following Hint service URLs to your allowlist in order for Hint to work:
 - $\circ\ https://hint-data-enrichment.service.sugarcrm.com$
 - https://hint-interest-subscription.service.sugarcrm.com
 - https://hint-notifications.service.sugarcrm.com

Module Loadable Package Hint

Notice: Beginning in Sugar 12.0, Hint has been built into the Sugar codebase and is no longer a module loadable package (MLP). The MLP will be updated only for security patches.

If you purchased Hint 5.4.3 or lower for use with Sugar 11.0.x or lower, Hint was delivered as a module loadable package and an admin user must then download the Hint package and install it to your instance using the instructions in this guide. The package will be available for download after you receive your purchase confirmation email. After installing Hint, SugarCRM will automatically upgrade Hint for cloud instances as new versions are released. If your instance is hosted elsewhere, an administrator must install Hint and, as new versions are released, upgrade Hint using Module Loader. The following prerequisites must be met before installing Hint on an on-site Sugar instance:

- You must be an administrator to access Module Loader as required by this guide.
- Cron must be enabled because Hint relies on several scheduled jobs to function.
- Your Sugar instance must be upgraded to at least the minimum supported version of Sugar. For more information on supported platforms, please refer to the <u>Connectors Supported Platforms</u> page.
- If you would like Hint to connect to Hint services in a region other than the region where your Sugar instance is installed, you must <u>specify the Hint</u> <u>services region</u> before installation. It is not possible to choose a different region after installation.
- If your server has firewalls set up that block direct access to the internet, you must add the following Hint service URLs to your allowlist in order for Hint to work:
 - https://hint-data-enrichment.service.sugarcrm.com
 - $\circ\ https://hint-interest-subscription.service.sugarcrm.com$
 - https://hint-notifications.service.sugarcrm.com

• When it is installed, the Hint package merges changes to several layout and JavaScript files. If you have other customizations in these files, it is recommended to back them up prior to installing the Hint package. For more information, refer to the <u>Using Hint With Your Sugar Customizations</u> article.

Note: Current and prospective Sugar customers can request an evaluation or demo of Hint from <u>Sugar's home page</u>.

Getting Started with Hint

If you are using the module loadable package version of Hint with Sugar 11.0.x or lower, you must start with <u>downloading</u> and <u>installing</u> the Hint package.

For users of Hint 6.0 and higher with Sugar 12.0 and higher, Hint is already installed on your instance and you can proceed with choosing the service region and setting the Hint license.

Choosing the Hint Services Region

If your Sugar instance is <u>SugarIdentity-enabled</u>, your Hint region is automatically configured to connect with services hosted in the supported region nearest to that of your Sugar instance. For Sugar 12.0, the available regions are the United States, Europe, and Asia/Pacific.

If your Sugar instance is not SugarIdentity-enabled, you must manually configure which region you are in by using the hint.hint_install_target_geo property to select a region. You must set the region before installing or upgrading to Sugar 12.0 or higher. Modify this setting in the config.php or config_override.php file located in the root folder. See the <u>Core Settings</u> page in the Developer Guide for details on this property.

The MLP version of Hint is automatically configured to connect with services hosted in the supported region nearest to that of the Sugar instance on which it is being installed. When using Hint with Sugar 11.0.x and lower, the regions supported by the Hint services are the United States and Europe. If you wish to manually specify which region's Hint services you want Hint to connect to, you can update the system config_override.php file before Hint installation. In particular, you can add the optional hint.hint_install_target_geo property to select a region. See the <u>Core Settings</u> page in the Developer Guide for details on this property.

Note: Once configured, it is not possible to modify the region Hint connects to.

Setting the Hint License Type

On Sugar 11.0.0 and higher, you will see the Hint value in the License Type field on user records if you have purchased Hint as an add-on (Sugar Sell Premier users do not have a separate Hint license). Administrators must select the Hint value for users that should have access to Hint feature (i.e., Hint panel and Hint Insights dashlet).

The "Hint" License Type field value is automatically set for users on installation or upgrade of Hint 5.4.0 through Hint 5.4.2, including if you have Hint 5.4.0 and then upgrade Sugar to 11.0.0 or higher. Hint assigns licenses to active users in the order of most recent login time until all Hint seats are assigned. If you need to reassign Hint licenses, you can either mass update all or a subset of active users or individually update specific users to add the Hint license type after installation.

Admins without the Hint license type can still access Hint configuration in the Hint section of the Admin page. If you remove the Hint license type from a user, that user will no longer have access to Hint (e.g., the Hint panel or Hint Insights dashlet) and will no longer receive notifications for any of their Hint Insights subscriptions. However, their notification settings are preserved and notifications resume if you assign the Hint license type to the user again. Note that the Hint license type cannot be selected alone and must be applied in conjunction with a CRM license type (e.g., Sell or Serve).

For information on updating user records, refer to the <u>User Management</u> documentation. For more information on license types, refer to the <u>Understanding</u> <u>User Types, License Types, and Sugar Licenses</u> article.

Admin Configuration

Optionally, an administrator can <u>configure the fields</u> enriched by Hint or shown in the Sugar Hint preview panel for leads, contacts, and accounts. Each module's Sugar Hint panel may be configured independently. Admins can also <u>configure the</u> <u>Hint logger</u>, <u>turn off Hint notifications</u>, <u>resync with the Hint Insights service</u>, and <u>uninstall Hint</u> (Module Loadable Package Hint only) in the Sugar Hint section added to the Admin page.

Note (Module Loadable Package Hint only): It is recommended to use the Uninstall tool that is included with Hint to remove Hint instead of doing so via Module Loader. Hint's Uninstall tool better handles disconnecting from the Hint services and removing all configurations from your Sugar instance, and even allows you to maintain all Hint Insights subscriptions upon reinstallation if desired.

The following two sections describe the available <u>Hint fields</u> and how to <u>configure</u>

the Sugar Hint dashboard panels to meet your organization's needs.

Understanding Hint Fields

Hint adds a new panel to the bottom of record view layouts in the Contacts, Leads, and Accounts modules, which causes the Show More panel to be automatically expanded. The Sugar Hint panel in record view displays the fields added by Hint during installation.

The following custom fields will be added to your modules and their record views. An administrator can add these fields to other layouts (e.g., Mobile, list view, etc.) if desired via Admin > Studio. For more information on modifying layouts, please refer to the <u>Studio</u> documentation.

Display Label	Database Name	Туре	Added to Accounts	Added to Contacts	Added to Leads
Annual Revenue	hint_account _annual_rev enue_c	TextField			
Company Description	hint_account _description _c	TextField			
Company Facebook	hint_account _facebook_h andle_c	URL			
Company Location	hint_account _location_c	TextField			
Company Logo ¹	hint_account _pic_c, hint_ account_log o_c	Image, URL			
Company Size	hint_account _size_c	TextField			
Company Twitter	hint_account _twitter_han dle_c	URL			
Company Website	hint_account _website_c	TextArea			
Education	hint_educati on_c	TextField			
Education	hint_educati	TextField			

Additional ²	on_2_c			
Facebook Link	hint_faceboo k_c	URL		
FY End	hint_account _fiscal_year_ end_c	TextField		
Industry	hint_account _industry_c	TextField		
Industry Tags	hint_industr y_tags_c	TextField		
NAICS Code	hint_account _naics_code_ label_c	TextField		
Previous Jobs	hint_job_2_c	TextField		
SIC Code	hint_account _sic_code_la bel_c	TextField		
Twitter Link	hint_twitter_ c	URL		
Year Founded	hint_account _founded_ye ar_c	TextField		

¹ In the database, the Company Logo field is represented by two fields: hint_account_pic_c, which is the actual image field you see, and hint_account_logo_c, which contains the URL location of the image. ² The Education Additional field is not listed in <u>Admin > Hint Fields</u> because it is always displayed as the second line of the Education field in the Hint panel. Any configurations applied to the Education field are automatically applied to the Education Additional field for the module.

Hint also uses some of Sugar's stock fields to store enriched data. The following stock fields in the Contacts, Leads, and Accounts modules are populated when downloading Hint's enriched data. If you have modified your layouts to remove these fields, you may want to add them back to your layouts via Admin > Studio. For more information on modifying layouts, please refer to the <u>Studio</u> documentation.

Display Label	Database Name	Туре	Populated for Accounts	Populated for Contacts	Populated for Leads

Account Name	account_na me	TextField		
Annual Revenue	annual_reve nue	TextField		
Avatar	picture	Image		
Description	description	TextArea		
Mobile	phone_mobil e	Phone		
Office Phone	phone_work	Phone		
Other Phone	phone_other	Phone		
SIC Code	sic_code	TextField		
Title	title	TextField		
Twitter Account	twitter	TextField		
Website	website	URL		

Users without a Hint license can see imported values in these fields if the fields are displayed on their record view. Note that by default, the panel that Hint adds to record view is only visible to Hint users, but the custom fields it contains can be added to other places (e.g., a different panel in record view) to allow non-Hint users to see the data.

Configuring Hint Fields

Administrators can navigate to Admin > Hint Fields to personalize the Sugar Hint dashboard panel by showing, hiding, and rearranging the displayed fields, as well as enabling and disabling enrichment for each one. The Sugar Hint Fields drawer displays all of the fields found in Studio for the module along with the <u>Hint fields</u> for that module.

On the right-hand side is a list of fields available to be configured. The top section, Enriched Fields, lists all fields that Hint can enrich, including both those added by Hint and stock Sugar fields. The bottom section, Additional Sugar Fields, lists all fields that Hint cannot enrich; you may wish to show these in the Sugar Hint panel for informational purposes when viewing the Hint preview from list view. Enabling "Show in Hint" for enriched fields displays them in the Hint dashboard panel and the Hint section of record view. Enabling "Show in Hint Panel" for additional Sugar fields simply displays them in the Hint dashboard panel. The search bar at the top can be used to look for a specific field in either section.

Fields				
Search				
Enriched Fields				
This section lists all Hir Hint fields are marked Hint panel if they are e	nt fields and Sugar f with an asterisk (*) nriched.	ields that are enriched by Hint. and can only be shown in the		
Field Name	Enrich Field	Show in Hint		
Annual Revenue				
Company Facebook*				
Company Location*				
Company Size*				
Description				
FY End*				
Industry*				
Industry Tags*				
NAICS Code*				
SIC Code				
Twitter Account				
Year Founded*				
Additional Sugar Fields				
This section lists all Sugar fields that are not enriched by Hint.				
Field Name		Show in Hint Panel		
Alternate Phone				

In the Enriched Fields section, fields marked with an asterisk (*) are fields added by Hint. They can only be shown in the Hint panel if they are enriched, and so disabling enrichment for them also disables the Show in Hint checkbox. There are also some fields with the Show in Hint checkbox hidden; these fields cannot be removed from the view because Hint is designed to always show them. Likewise, fields in the Additional Sugar Fields section with the Show in Hint Panel checkbox disabled can also not be removed.

On the left-hand side is a live-updated view of what the Sugar Hint panel will look like as you make your changes. Each module is displayed in its own tab and switching between tabs updates the list of fields on the right as well.

Sugar Hint Fields		Cancel	Save
Accounts Contacts Lead	ds		
Basic Hint Panel Layout			
Ac	Account Name Company Website	₽	
Company Size Industry	Company Size Industry		

To configure the Hint panel for a module, update the checkboxes for each field on the right-hand side. Disabling "Enrich Field" prevents Hint from returning any enriched data for that field. Once you have the desired fields displayed, drag and drop items directly within the layouts to reorder them. Those displayed with a lock icon cannot be moved or hidden because Hint is designed to always show these fields.



Once you are satisfied with your changes for each module, click "Save" to preserve all three modules' configurations. To restore the specific tab you are viewing to its default values, see the <u>Restoring Default Settings</u> section.

Restoring Default Settings

If you would like to revert the Hint fields for a specific module to its default state, use the link at the bottom of the tab. Clicking this link immediately restores the current tab to its original state. It is recommended to only restore the default settings if you have not already manually made changes to the configuration without saving. That way, if you restore the defaults and decide you do not want to keep this change, you can simply click "Cancel" to close the drawer and undo the reversion.

- Rearrange the fields by dragging and dropping within the Hint Panel Layout sections above.
- For detailed instructions and a list of default fields, refer to the Hint Administration Guide.
- Click Here to restore default settings for accounts, contacts, and leads.

Configuring the Hint Logger

The Hint logger writes log entries to the <u>Sugar log</u> to help you debug potential unexpected behavior. The default log level is "Alert" but it can be changed to levels such as "Critical", "Info", or "Debug" in Admin > Hint Configuration. Navigate to Admin > Hint Configuration and select the desired level in the dropdown menu in the Hint logger section and click "Save" to preserve the change. The new log level will be used immediately.

Turning off Hint Notifications

Occasionally, it is useful to turn off all <u>notifications</u> (i.e., email, desktop pop-up, and Hint Insights dashlet) for an entire Sugar instance. One particular example is when you are cloning an instance, such as for troubleshooting purposes. If you clone an instance where users are subscribed to Hint notifications, they will start to receive duplicates of all email notifications - one from the original instance and one from the clone. To avoid this, navigate to Admin > Hint Configuration on the cloned instance to turn off notifications and save this change before enabling cron. This way, users will continue to receive notifications from the production instance and will not receive any duplicates once you enable cron on the clone.

Resyncing With the Hint Insights Service

If you are seeing inconsistent behavior in notifications from the <u>Hint Insights</u> service, you may need to resync with the service. This inconsistency may manifest as changes to preferences and email addresses not taking effect.

To resync, click "Resync with the Hint Insights service" in the Hint section of the Admin page. A popup will appear asking you to confirm that you wish to proceed with the sync. It is important to note that performing a resync will cause any pending email digest stories to be lost and existing news to be cleared from the Hint Insights dashlet.

Notifications of all types will resume after the sync completes.

Working With the Module Loadable Package Hint

Downloading Hint

Once you have purchased Hint and received a confirmation email, customers can use the following steps to access and download the Hint package:

- 1. Log in to your SugarCRM.com account. For more information on setting up a SugarCRM.com account, please refer to the <u>Managing Your Sugar</u> <u>Subscription</u> article.
- 2. Navigate to your <u>Software Downloads page</u>.
- 3. Select "Relationship Intelligence" from the dropdown menu at the top of the page.
- 4. Expand the panel that shows your current version of Sugar and click on the appropriate .zip file to download Hint.

Downloads

Based on your subscription	you have access to the foll	owing files:
Relationship Intelligence		(
Sugar Relationshi	p Intelligence 7.9.4.0	
Hint		
File	Size	Date Posted
SugarHint-3.0.0.zip	110.69KB	2018-01-31

You may now install the .zip file to your Sugar instance using Module Loader.

Please refer to the <u>Installing and Upgrading Hint</u> section for further instructions.

Installing and Upgrading Hint

For on-site Sugar instances, an administrator must install Hint and, as new versions are released, upgrade Hint using Module Loader. Customers on Sugar's cloud service will only need to install Hint initially; upgrades will be applied automatically. To get the latest software package, follow the steps in the <u>Downloading Hint</u> section.

Use the following steps to install or upgrade Hint after ensuring that all <u>prerequisites</u> have been met:

- 1. If you are upgrading Hint on a Sugar version lower than 8.1.0, or if you are upgrading from Hint 4.1.x on any Sugar version, please <u>uninstall the</u> <u>previous version of Hint</u> before continuing with these steps.
- 2. Navigate to Admin > Module Loader.
- 3. Click the "Choose File" button to find and select the .zip file you downloaded in the Downloading Hint section.
- 4. Click "Upload".



5. Once the new version of Hint appears in the lower panel, click its adjacent "Install" button.

Name 🔤	Install	Delete	Туре
SugarCRM Hint	Install	Delete Package	Module

- 6. Click "Commit" to begin the installation.
- 7. Finally, clear your browser's cache before <u>using</u> or <u>configuring</u> Hint.

Note: To ensure that installed fixes take effect after upgrading your Hint installation, all users should <u>clear their browser cache</u> and then log out and back into Sugar. If other integrations are affected by the installation or upgrade of Hint, perform a <u>Quick Repair and Rebuild</u>, which often resolves installation issues.

Uninstalling Hint

Uninstalling the Hint package removes Hint from your instance if you no longer wish to use the service. Also, for instances running a Sugar version lower than 8.1.0, Hint must be uninstalled prior to upgrading to a newer Hint package.

Uninstalling or upgrading Hint on Sugar versions lower than 8.1.0 will remove certain layout and JavaScript files from the instance. If these files contain

customizations made outside of Hint, those customizations will be lost when the uninstall of Hint removes the files. As a workaround, it is recommended to back up these files prior to uninstalling Hint, complete the uninstallation, then restore the files. For more information, refer to the <u>Using Hint With Your Sugar</u> <u>Customizations</u> article.

Hint 5.4.0 and higher includes an Uninstall tool in the Admin page of Sugar instances on versions 10.2.1 and higher. This Uninstall feature uninstalls Hint more cleanly than Module Loader does and as a result, it is recommended to use this tool provided by Hint when possible to complete uninstallation. The provided tool better handles disconnecting from the Hint services and removing all configurations from your Sugar instance, and even allows you to maintain all Hint Insights subscriptions upon reinstallation if desired. It is still possible to use Module Loader, but if you do, Hint Insights notifications may not stop after uninstallation and it will not be possible upon reinstallation of Hint to resume the previously configured notifications.

Use the following steps to uninstall Hint using the provided Uninstall tool on Hint 5.4.0 and higher when installed on Sugar 10.2.1 and higher:

1. Navigate to Admin > Hint and open the Uninstall page.

Hint	
Configure settings for Hint	
➡ Hint Fields	Resync With the Hint Insights Service
Hint Configuration	👕 Uninstall

2. Select whether you wish to only uninstall the Hint package or completely uninstall all of Hint. See the <u>Uninstallation Types</u> section below for a description of each option but note that the Uninstall Hint Completely option deletes all Hint settings and cannot be undone.



3. Click the Uninstall button and accept the confirmation pop-up that appears to start the process. Uninstallation may take several minutes and will reload the Admin page once complete.

It is not recommended to uninstall Hint using Module Loader on instances where Hint's uninstallation tool is available because the tool provided by Hint completes the process more cleanly. However, on Hint 5.3.4 and lower, or on Sugar 10.2.0 and lower, you can use the following steps to uninstall Hint:

- 1. Navigate to Module Loader.
- 2. Find the active Hint version in the upper panel of Module Loader and click its adjacent "Uninstall" button.
- 3. Choose the row in the table below that applies to you and complete the relevant step on the Ready to Uninstall screen:

Hint Version	Do You Plan to Upgrade?	Recommended Action to Take
4.0.0 and lower	Yes	Cancel out of this uninstall procedure. Older versions of Hint may not offer the "Do Not Remove Tables" option. You will lose your accumulated Hint data by uninstalling. To avoid this loss of data during an upgrade, please proceed directly

		to the <u>Installing and</u> <u>Upgrading Hint</u> section now.
	No	Proceed with uninstalling Hint. All data associated with Hint will be permanently removed from your instance.
4.0.1 - 4.1.1	Yes	Select "Do Not Remove Tables" to keep the fields added by Hint in Sugar, then proceed with uninstalling Hint.
	No	Select "Remove Tables" to permanently delete all data associated with Hint from your instance, then proceed with uninstalling Hint.
5.0.0 and higher	Yes	Proceed with uninstalling Hint. All data associated with Hint will remain in your instance.
	No	Proceed with uninstalling Hint. All data associated with Hint will remain in your instance.

4. Click "Commit" to begin uninstalling Hint. Sugar will take several minutes to complete the uninstall process and then display a confirmation.

If you followed either of these sets of steps to remove Hint altogether, you have completed the process. To install a new version of Hint in place of the uninstalled version, please proceed to the steps in the <u>Installing and Upgrading Hint</u> section.

Uninstallation Types

There are two uninstallation types when using Hint's included Uninstall feature, accessible in the Hint section of the Admin page. It is important to choose the correct option based on if and how you plan to use Hint again in the future. See

the sections below for a description of when to use each one.



Uninstall Hint Package Only

Choose the Uninstall Hint Package Only option if you may want to install Hint again in the future. This option removes the actual Hint module loadable package (MLP) and disables all active Hint Insights notification subscriptions, whereas uninstallation via Module Loader does not disable notification subscriptions. If you use this option in the provided Uninstall tool, all of your users' notification settings will be preserved and notifications will resume if you choose to reinstall Hint later.

Uninstall Hint Completely

Choose the Uninstall Hint Completely option if you do not intend to install Hint again in the future, or if you want to completely remove all of your users' settings and start from a clean installation of Hint. This option removes the module loadable package (MLP) and also deletes all configuration and Hint Insights notification subscriptions. There is no way to undo this action, so be sure to complete a full backup of your Sugar instance before completing this process. It is also best to put Sugar into maintenance mode before starting; see the <u>Advanced</u> <u>Configuration Options</u> page in the Sugar Administration Guide for more details on doing this.

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