
wMobile for SugarCRM User Guide

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wMobile for SugarCRM User Guide

Overview

wMobile for SugarCRM puts the power of W-Systems add-ons and enhancements at your fingertips and allows you to do your best work in Sugar anywhere, on any device. wMobile for SugarCRM works on phones and tablets you already use, and setup is simple so you'll be productive in no time. Native device integrations such as click-to-call, click-to-text, and GPS mapping allow you to get the most out of every customer interaction.

This guide covers how users can engage with wMobile for SugarCRM after it has been installed and configured by an administrator. For more information on installing wMobile for SugarCRM, please refer to the [W-Systems Product Installation Guide](#).

Note: This guide pertains to the latest release of wMobile for SugarCRM. If you are not using the latest version of wMobile for SugarCRM, 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 and Benefits

wMobile for SugarCRM lets you personalize your Sugar experience to easily manage all your activities. With offline sync, the information you need the most is available from your mobile device whether or not you are online.

- **Discover Accounts Near Me:** Are you planning a business trip to visit customers? wMobile for SugarCRM with our wMaps add-on enables you to filter records such as customers, opportunities and leads near your location, and then plot a route with Google Maps. You can add or remove Sugar records from your route with just a few taps.
- **Create Sales Documents on the Go:** You need to create and send a sales proposal from Sugar, but are out of office. With wMobile for SugarCRM and our wDocs add-on, generate documents and forms anywhere, on any device.
- **Add Detailed Notes on the Fly:** Need to quickly add a note to one of your contacts in Sugar? wMobile for SugarCRM can do that—with a single tap! Our quick action buttons extension included with wTools has made it to mobile, enabling you to create related records with little to no effort.
- **Faster Access to Anything on Mobile:** Make your daily workload easier and focus on what's important. wMobile for SugarCRM's quick action buttons included with wTools can help you create shortcuts for your most

often performed actions, including the ability to generate documents and map routes using with W-Systems add-ons for Sugar.

Packages Included in wMobile for SugarCRM

- [DocuSign Integration with wMobile for SugarCRM](#)
- [wDrive Integration with wMobile for SugarCRM](#)
- [wDocs for Microservices Integration with Mobile for SugarCRM](#)
- [wMaps Integration with wMobile for SugarCRM](#)
- [Attachments Field Integration with wMobile for SugarCRM](#)
- [The Custom Buttons Integration with wMobile for SugarCRM](#)

DocuSign Integration with wMobile for SugarCRM

- [Administering the Sugar Connector to DocuSign Package](#)
- [Using the DocuSign for wMobile for SugarCRM Extension](#)

Administering the Sugar Connector to DocuSign Package

To configure the DocuSign for wMobile for SugarCRM package, ensure that you install the Sugar Connector to DocuSign package on your Sugar instance by following the configuration steps described in the [Sugar Connector to DocuSign User Guide](#).

Before using the Sugar Connector to DocuSign on your mobile, ensure that you make all modules visible for mobile, from your desktop Sugar Instance.

Note: You must be a SugarCRM administrator to make the necessary changes to complete the configuration described in this section.

1. Go to the **Administration** page.
2. From the **System** section of the **Administration** page, open the **Mobile** page.

System

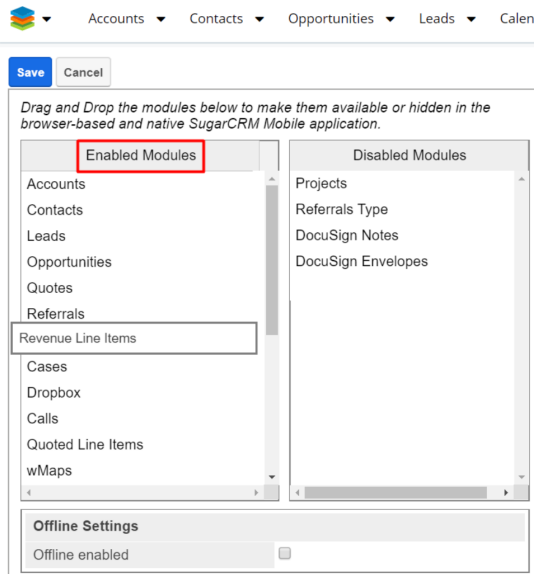
Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings within their user settings page.

System Settings	Configure system-wide settings	Import Wizard	Use the import wizard to easily import records into the system
Locale	Set default localization settings for your system	Upgrade Wizard	Upload and install Sugar upgrades
Currencies	Set up currencies and conversion rates	Languages	Manage which languages are available for users
Repair	Check and repair Sugar	Search	Select modules for the Global Search and configure full-text searching.
Diagnostic Tool	Capture system configuration for diagnostics and analysis	Connectors	Manage connector settings
Tracker	Enable/Disable tracking	Scheduler	Set up scheduled events
PDF Manager	Manage templates for generated PDF files	Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application
Web Logic Hooks	Manage Sugar Web Logic Hooks	OAuth Keys	OAuth key management

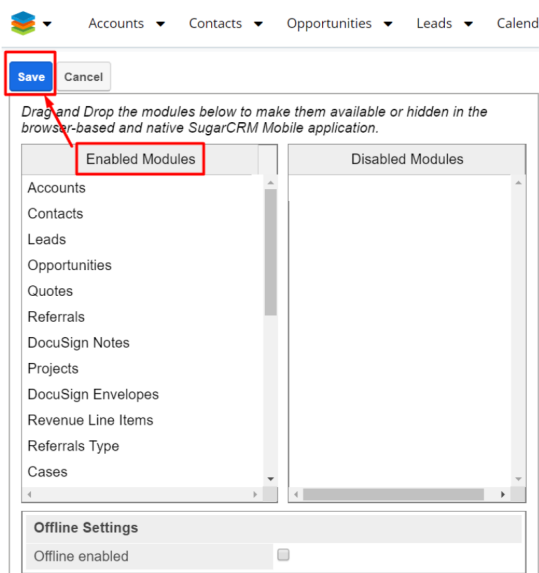
3. From the **Mobile** page, make all Modules available in the **Disabled Module** column visible for the mobile app.

The screenshot shows the 'Mobile' settings page in SugarCRM. At the top, there are navigation tabs for Accounts, Contacts, Opportunities, Leads, and Calend. Below the tabs are 'Save' and 'Cancel' buttons. The main content area contains the instruction: 'Drag and Drop the modules below to make them available or hidden in the browser-based and native SugarCRM Mobile application.' There are two columns: 'Enabled Modules' and 'Disabled Modules'. The 'Disabled Modules' column is highlighted with a red box and contains Revenue Line Items, Projects, Referrals Type, DocuSign Notes, and DocuSign Envelopes. The 'Enabled Modules' column contains Accounts, Contacts, Leads, Opportunities, Quotes, Referrals, Cases, Dropbox, Calls, Quoted Line Items, wMaps, and Tasks. At the bottom, there is an 'Offline Settings' section with a checkbox for 'Offline enabled'.

4. To manage this, drag and drop each module to the **Enabled Modules** panel.



- Once you enable all the available modules from the **Disabled Modules** panel, **Save** your new configuration.



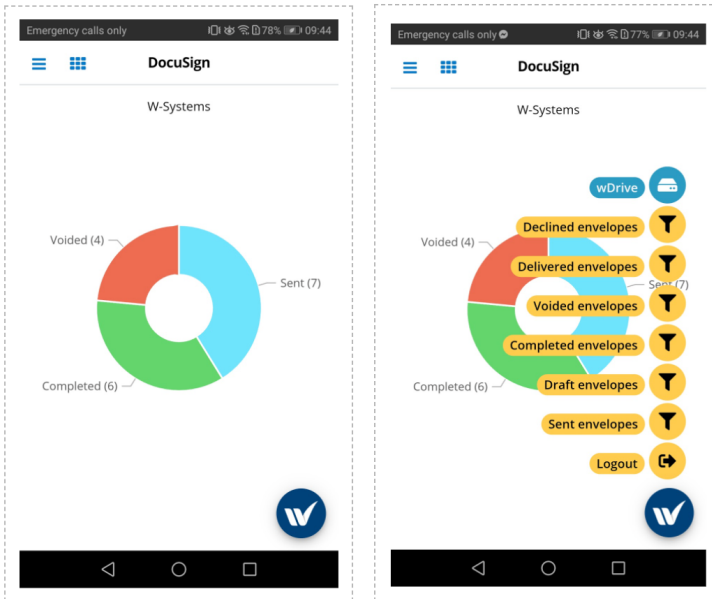
Note: The package configuration should be carried out on your desktop Sugar instance.

Using the DocuSign for wMobile for SugarCRM Extension

- [DocuSign Dashlet Options](#)
- [DocuSigned Document](#)
- [DocuSign Dashlet in Different Views](#)
- [DocuSign Supported Actions in Different Views](#)
- [Sending and Signing Documents from the wMobile for SugarCRM App](#)

DocuSign Dashlet Options

Users can observe different dashlet options when tapping on the **W button**, when in the **DocuSign Dashlet** view.



- **Declined Envelopes** - the number of delivered envelopes but that were declined signature by the recipient(s);
- **Delivered Envelopes** - the number of delivered envelopes that were also received by the recipient(s);
- **Voided Envelopes** - the number of delivered envelopes that were voided by the recipient(s);
- **Completed Envelopes** - the number and description of the delivered envelopes that were also signed by the recipient(s);
- **Draft Envelopes** - the number and description of the envelopes saved as draft to DocuSign;
- **Sent Envelopes** - the number and description of the envelopes sent with the DocuSign integration for wMobile for SugarCRM;
- **Logout** - this option allows users to log out of the DocuSign Integration.

Note: The DocuSign Dashlet chart contains the envelope number for each status. Tapping on any of the chart slices will open a new view with a description of the envelopes with the selected status.

< ☰ DocuSign Envelopes

Copy of Account Profile Template.docx
G,l,o,b,a,l

Smith & Sons-Copy of Account Profile Te...
G,l,o,b,a,l

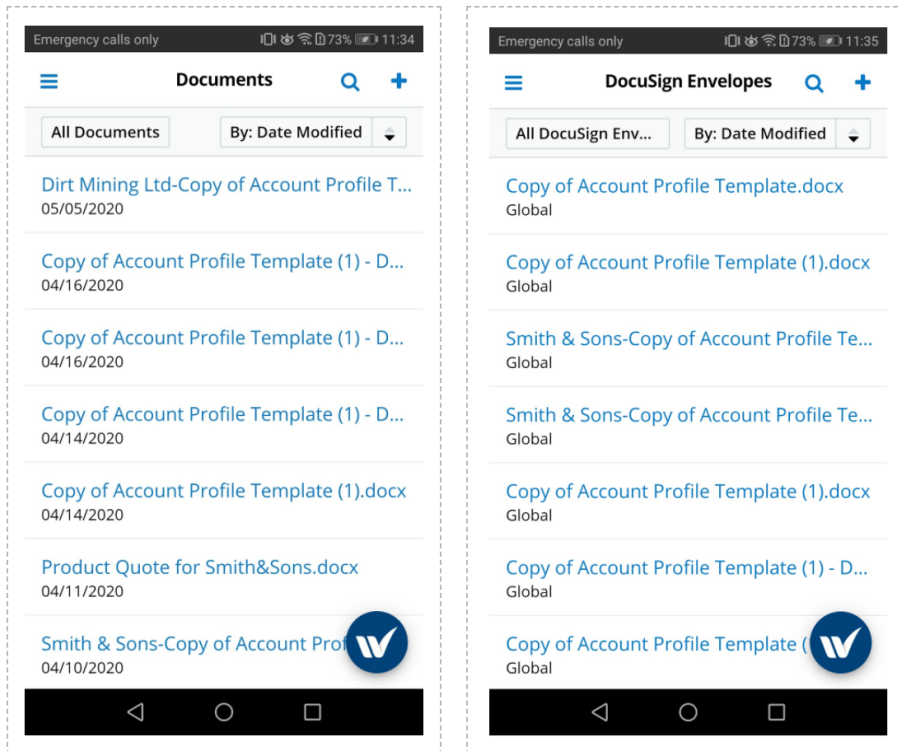
Smith & Sons-Copy of Account Profile Te...
G,l,o,b,a,l

Smith & Sons-Copy of Account Profile Te...
G,l,o,b,a,l



DocuSigned Document

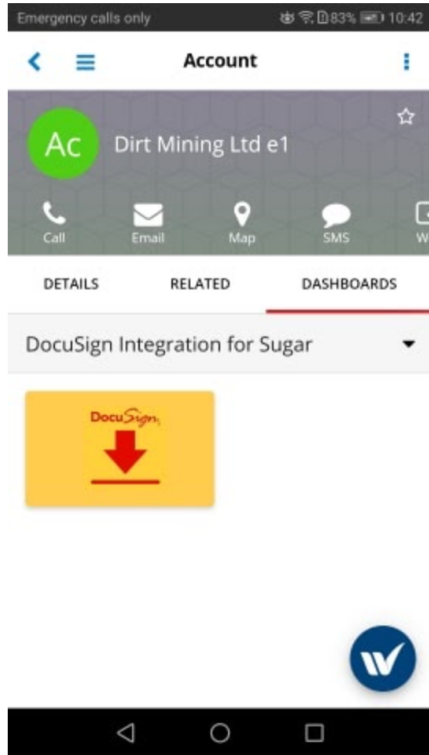
New records for the DocuSigned documents are created in the **Documents** module. These are related to the record from where the document was sent and to the **DocuSign Envelopes Module**.



DocuSign Dashlet in Different Views

The **DocuSign dashlet** is available on the **wMobile for SugarCRM app** in different views.

1. **Home Dashboard** - the DocuSign dashlet is from the home dashboard.
2. **Record View** - The DocuSign dashlet is available on different modules, in **Record View**, from the **Dashboards** panel.



Note: The DocuSign dashlet is not available on any module, in List View.

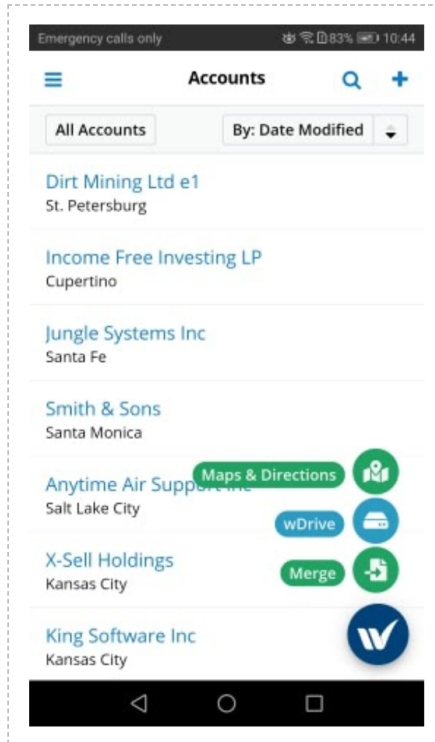
DocuSign Supported Actions in Different Views

The DocuSign integration with the wMobile for SugarCRM app supports the following actions:

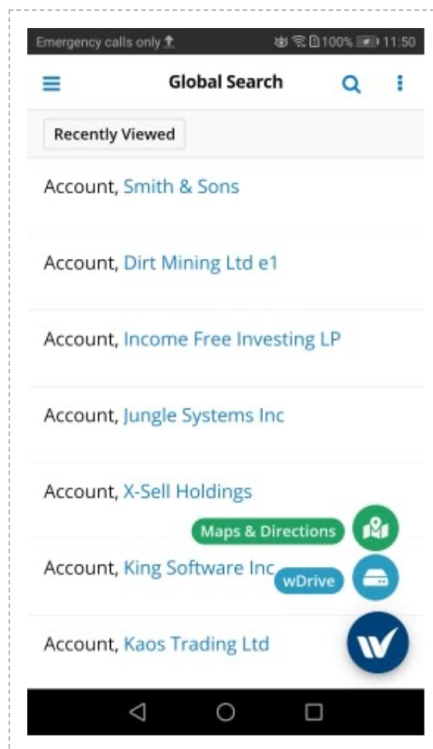
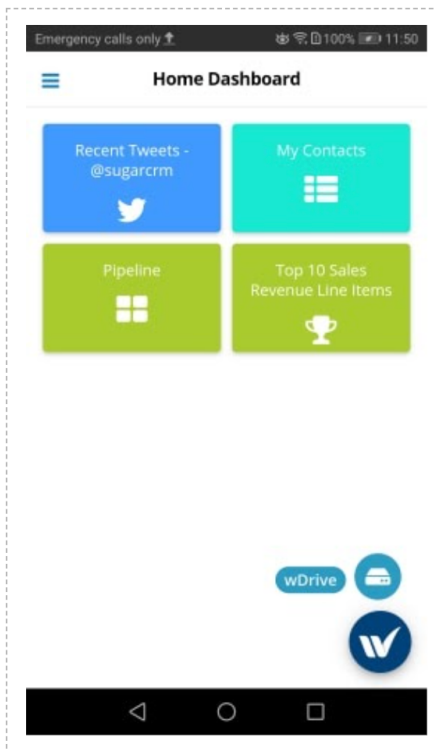
1. **Sign Document** - The **Sign Document** action is available for different Modules in **Record View**. To access it, tap on the **W button** available on the bottom of the screen device. When in Record View, tap on the **W button** at the bottom of your device screen. The **Sign Document** is available there.

Notes:

1. The Sign Document action is **not** available for **List View** for any of the modules available. It isn't available in the Record view for several modules, either - **DocuSign Notes, DocuSign Envelopes, Documents, wDocsMergeRequests, Employees, Reports, Emails.**



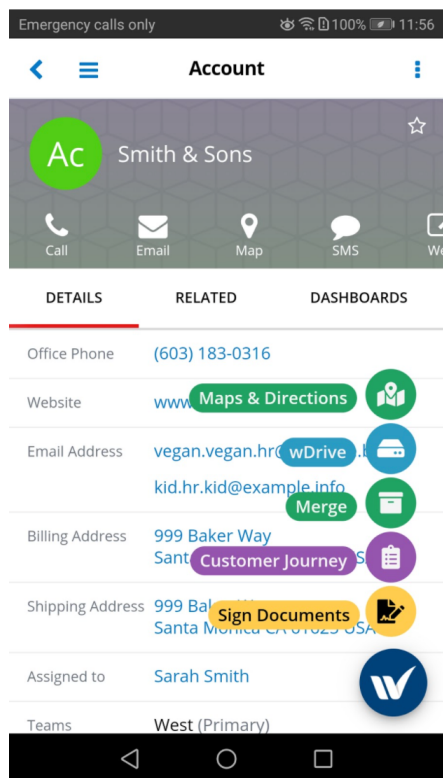
2. The **Sign Document** action is **not** available in the following views for the mobile app: **Home Dashboard, Global Search, Activity Stream**.



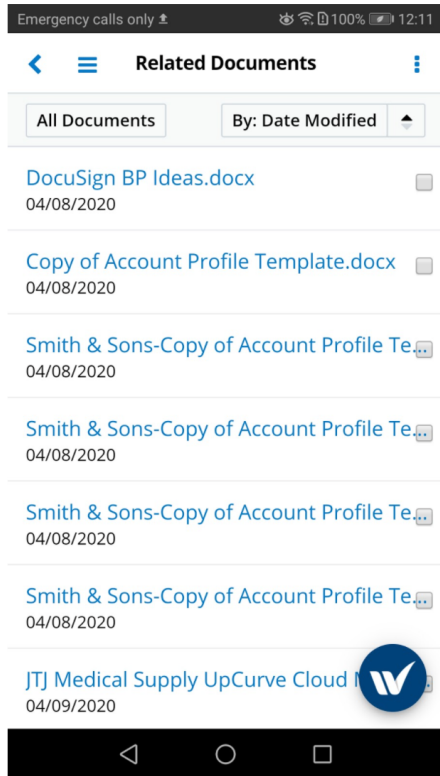
Sending and Signing Documents from the wMobile for SugarCRM App

Sending and signing documents with DocuSign from the wMobile for SugarCRM App is possible in multiple instances.

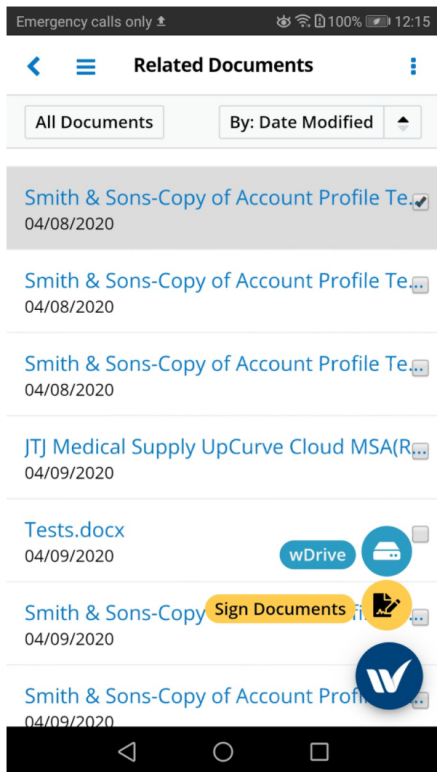
1. In **Record View**, on multiple modules, press on the **W button** and select the **Sign Document** action.



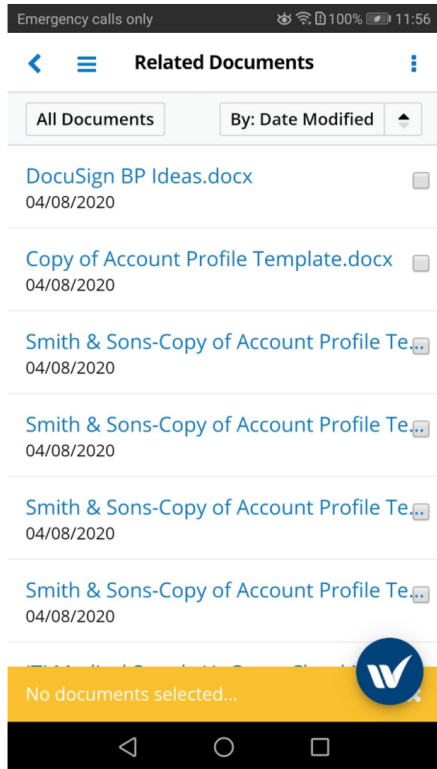
2. After pressing the **Sign Documents** action, a new view with **Related Documents** opens.



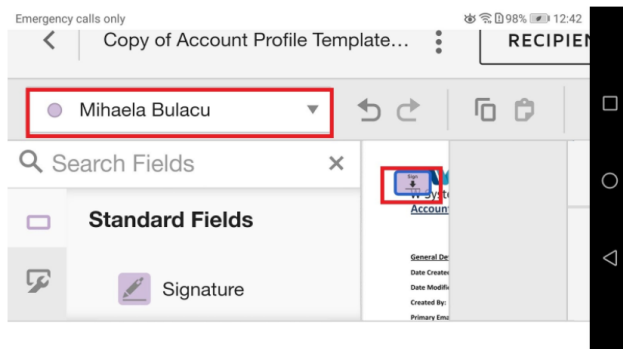
3. Select the related document(s) that will be sent for signature. Tap on the **Sign Document** action.



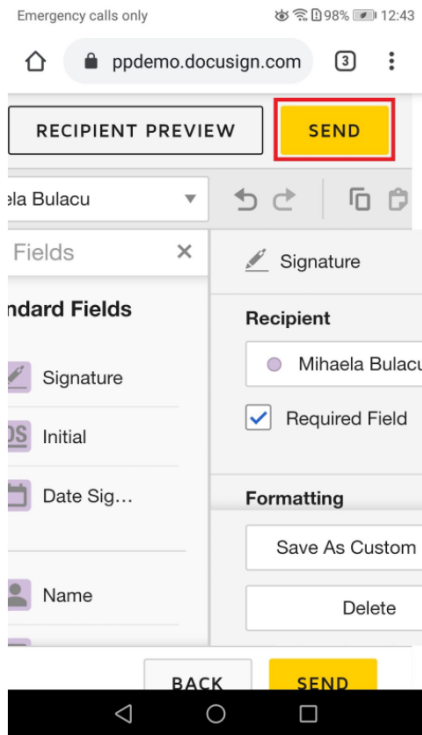
Note: If the user tries to tap the Sign Document action without selecting a related document, a warning message will be raised.



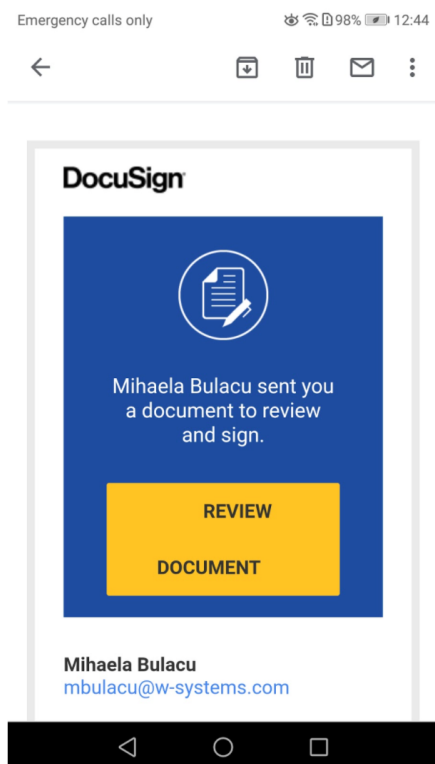
4. A new DocuSign browser tab will open. Set the signature fields on your document for each recipient that requires signature.



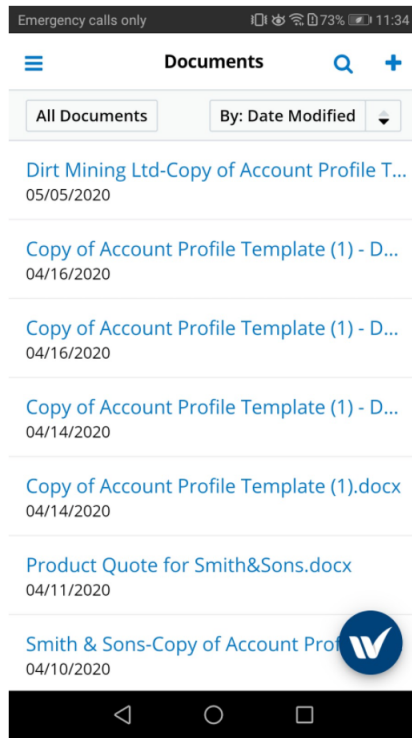
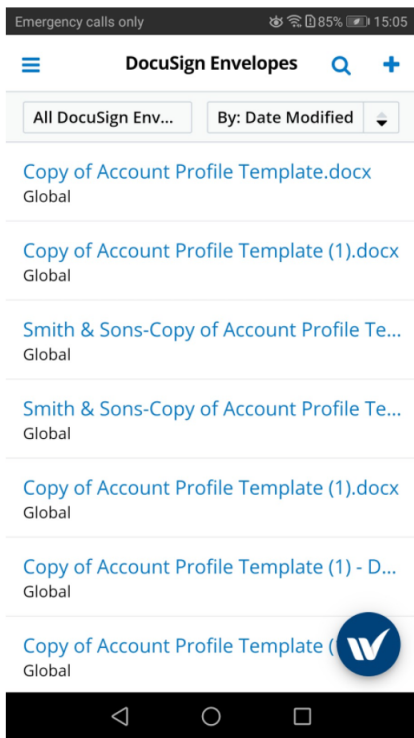
5. **Send** the document for signature.



6. Your recipients will be informed via email to review, sign, and resend the document to you.



Once the document is signed by all recipients, it will be added to the **DocuSign Envelopes** module and to the **Documents** module.



wDrive Integration with wMobile for SugarCRM

- [Administering the wDrive Integration with wMobile for SugarCRM](#)
- [Using the wDrive Integration with wMobile for SugarCRM](#)

Administering the wDrive Integration with wMobile for SugarCRM

To ensure proper use and deployment of this integration, make sure that you follow the configuration steps available in the [wDrive User Guide](#).

- [Dropbox Integration Configuration](#)
- [Google Drive Integration Configuration](#)
- [OneDrive Integration Configuration](#)

Before using the wDrive integration with wMobile for SugarCRM on your mobile, ensure that you make all modules visible for mobile, from your desktop Sugar Instance. If this step was already configured for another wMobile for SugarCRM package, please disregard this configuration step.

Note: You must be a SugarCRM administrator to make the necessary changes to complete the configuration described in this section.

Go to the **Administration** page.

From the **System** section of the **Administration** page, open the **Mobile** page.

System

Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings within their user settings page.

System Settings	Configure system-wide settings	Import Wizard	Use the import wizard to easily import records into the system
Locale	Set default localization settings for your system	Upgrade Wizard	Upload and install Sugar upgrades
Currencies	Set up currencies and conversion rates	Languages	Manage which languages are available for users
Repair	Check and repair Sugar	Search	Select modules for the Global Search and configure full-text searching.
Diagnostic Tool	Capture system configuration for diagnostics and analysis	Connectors	Manage connector settings
Tracker	Enable/Disable tracking	Scheduler	Set up scheduled events
PDF Manager	Manage templates for generated PDF files	Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application
Web Logic Hooks	Manage Sugar Web Logic Hooks	OAuth Keys	OAuth key management

From the **Mobile** page, make all Modules available in the **Disabled Module** column visible for the mobile app.

Accounts Contacts Opportunities Leads Calend

Save Cancel

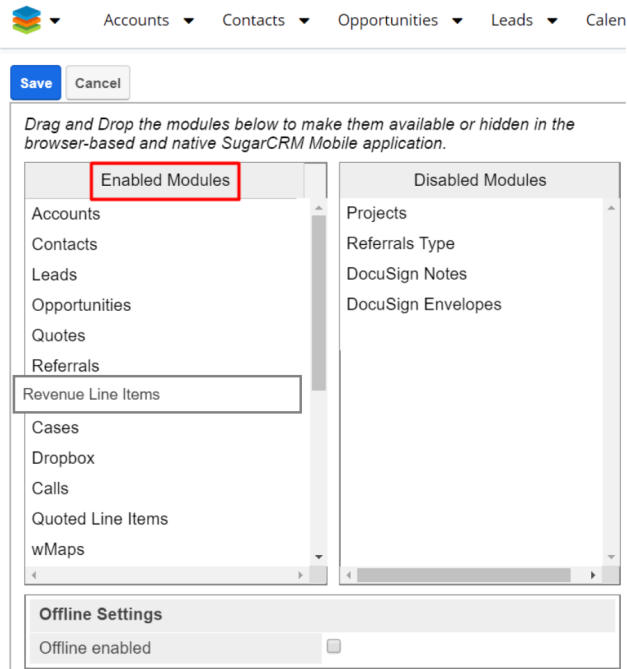
Drag and Drop the modules below to make them available or hidden in the browser-based and native SugarCRM Mobile application.

Enabled Modules	Disabled Modules
Accounts	Revenue Line Items
Contacts	Projects
Leads	Referrals Type
Opportunities	DocuSign Notes
Quotes	DocuSign Envelopes
Referrals	
Cases	
Dropbox	
Calls	
Quoted Line Items	
wMaps	
Tasks	

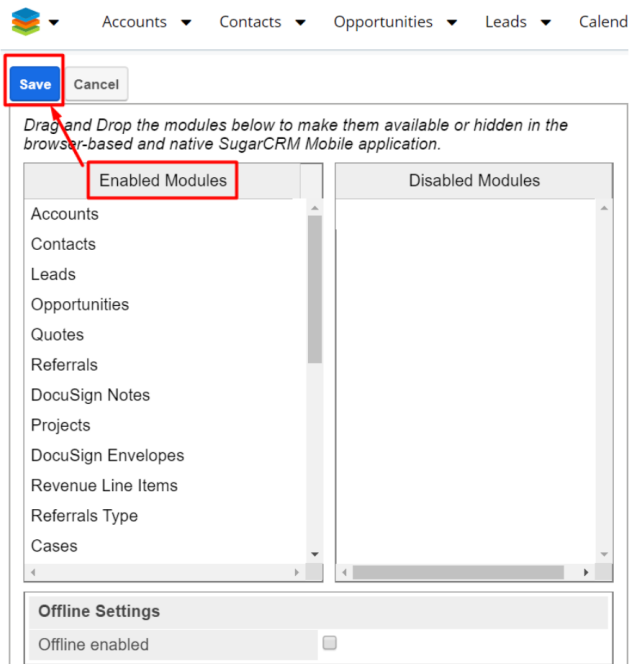
Offline Settings

Offline enabled

To manage this, drag and drop each module to the **Enabled Modules** panel.



Once you enable all the available modules from the **Disabled Modules** panel, **Save** your new configuration.



Note: The package configuration should be carried out on your desktop Sugar instance.

Using the wDrive Integration with wMobile for SugarCRM

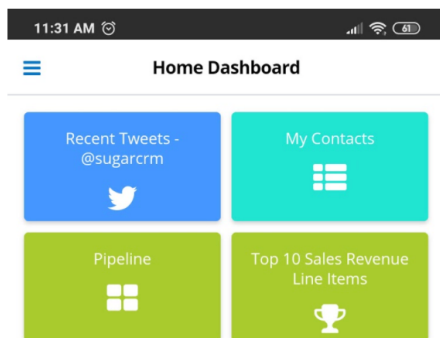
Dropbox

Touch Interactions

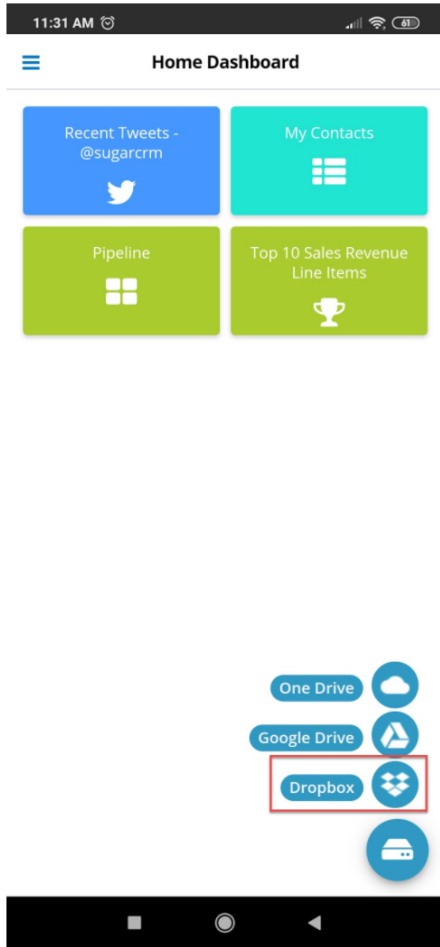
Downloading Files

Record Options

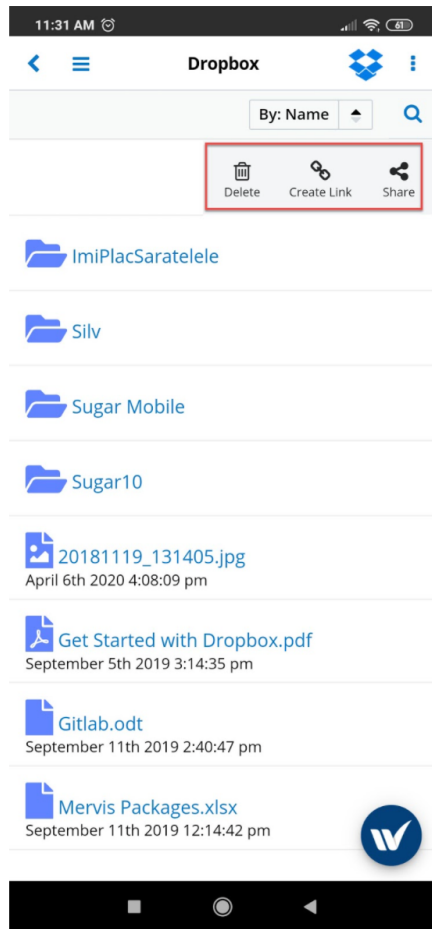
1. Open the wMobile for SugarCRM application on mobile.
2. Select wDrive from mobile's widget.



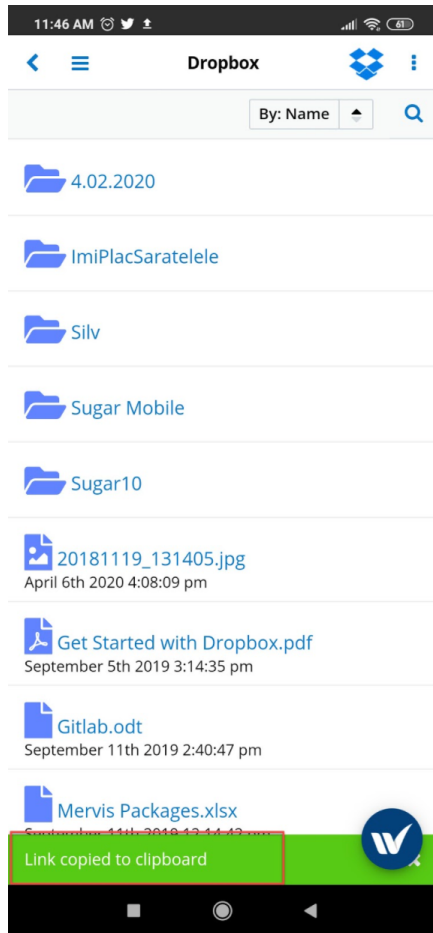
3. Check that there are 3 tabs for each dashlet (Dropbox, Google Drive, One Drive).
4. Navigate to Dropbox dashlet and select.



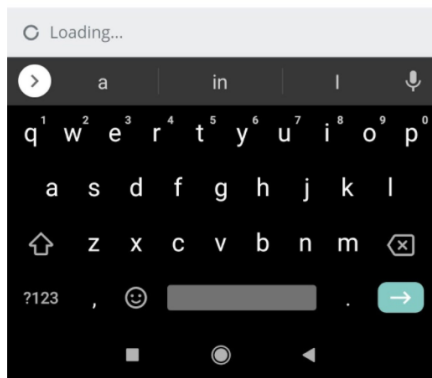
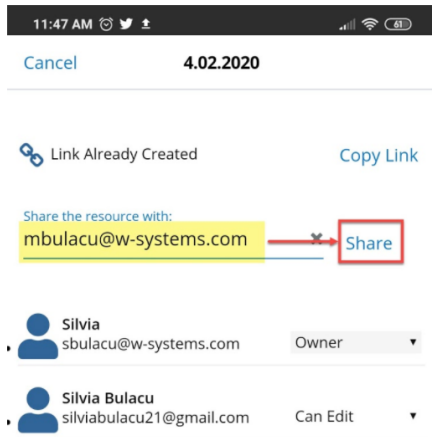
5. Slide to the right and check the following options are available:



6. **Delete** - tapping on the Delete action will remove the file from both the mobile and desktop dashlet.
7. **Copy Link** - Or Create Link, if the link was not previously created. Tapping on this action will copy the link of the Dropbox document to the user's clipboard.






8. **Share** - this option allows users to share files from the Dropbox dashlet. To manage this, fill in the email address of the users with whom you want to share the file and then tap Share.



The user will be then added to the list below.

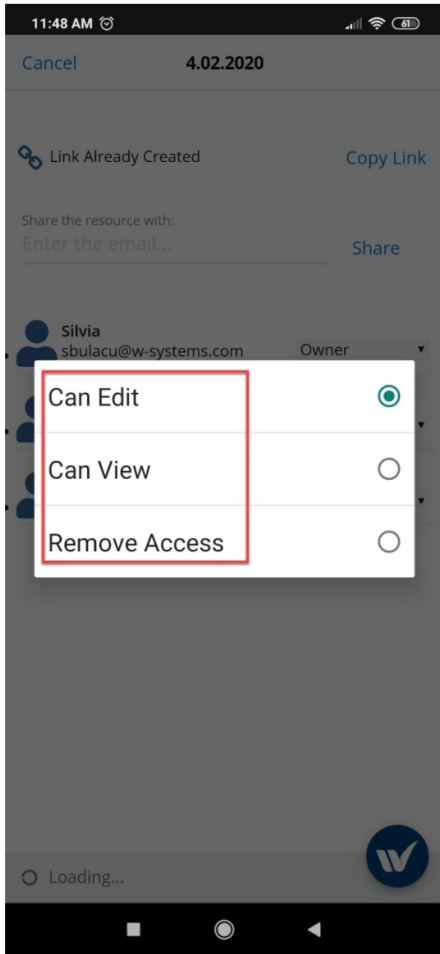
Link Already Created [Copy Link](#)

Share the resource with:
Enter the email... [Share](#)

 Silvia sbulacu@w-systems.com	Owner
 Miha Bulacu mbulacu@w-systems.com	Can Edit
 Silvia Bulacu silviabulacu21@gmail.com	Can Edit



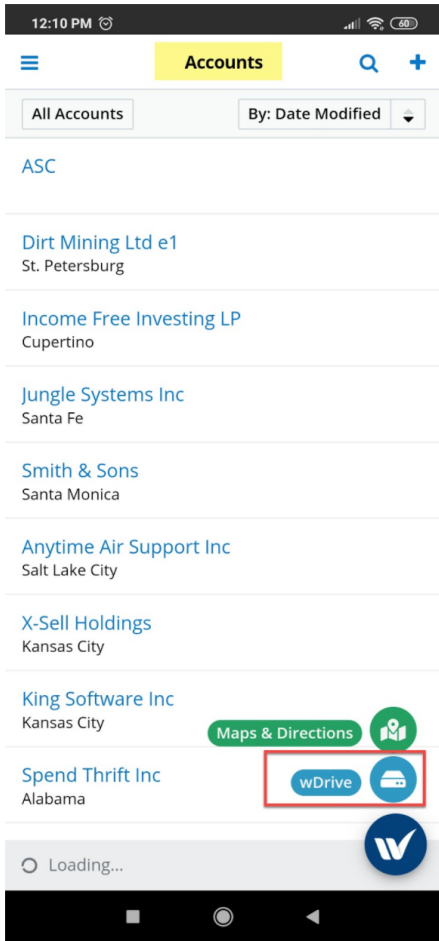
From here, you can set different permissions for each user.



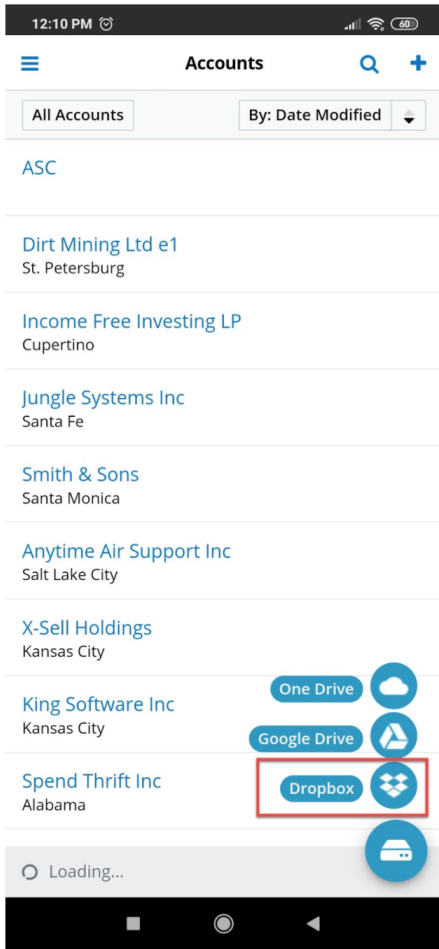
To remove access to a previously shared file, tap on the **Remove Access** option associated with the user's email account.

Create Sugar Documents

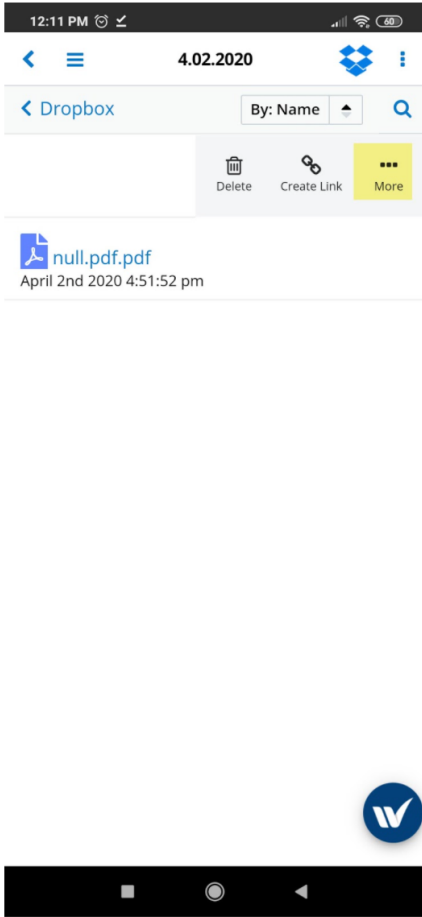
wDrive for wMobile for SugarCRM users can quickly create and add files to the **Documents module** from the Dropbox dashlet. For this, navigate to the **Accounts module** and select the wDrive option from the **W menu**.



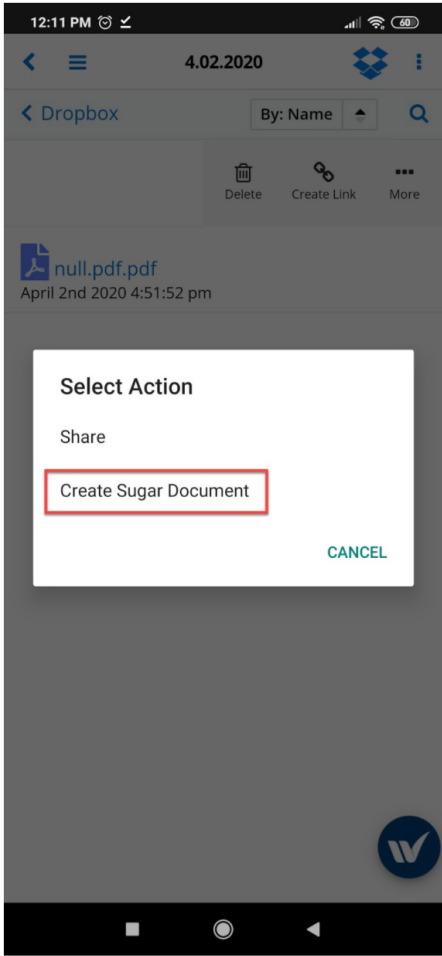
Select the **Dropbox** option.

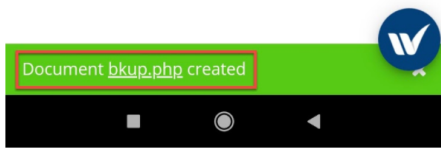
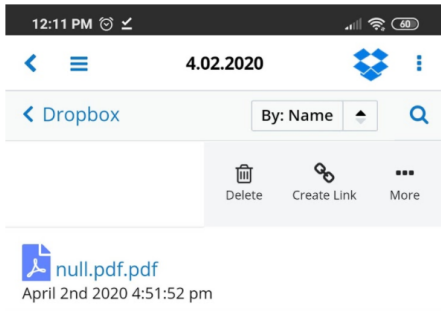


Slide on the desired document and tap the **More** option.

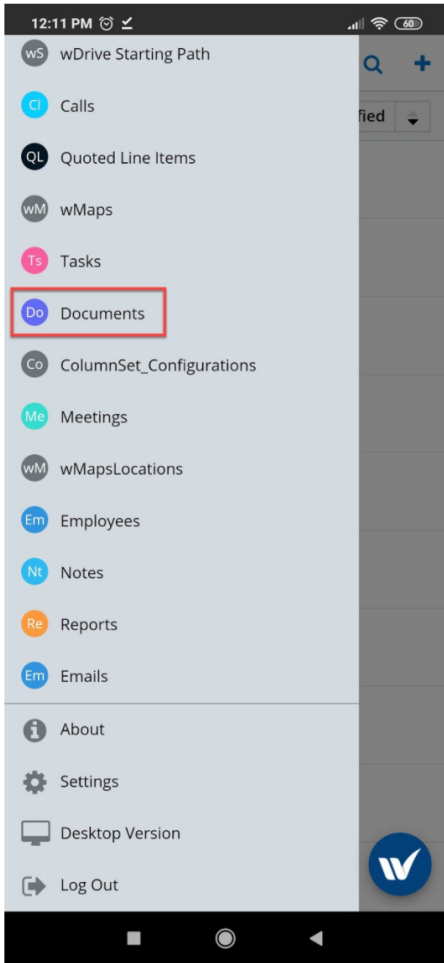


Choose the **Create Sugar Document** action from the pop up screen.

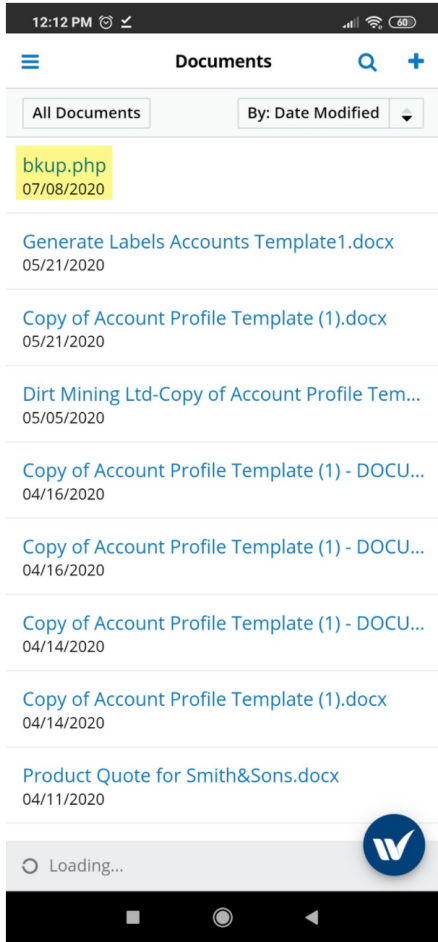




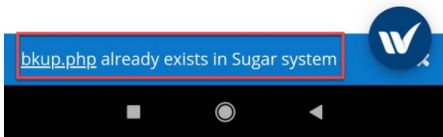
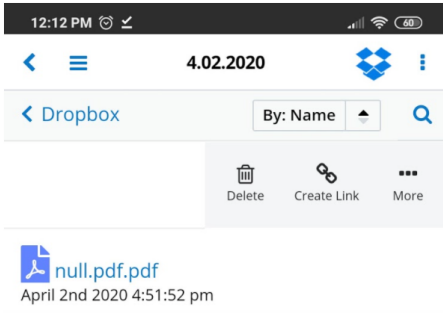
After the document is created, it will be added to the **Documents** module.



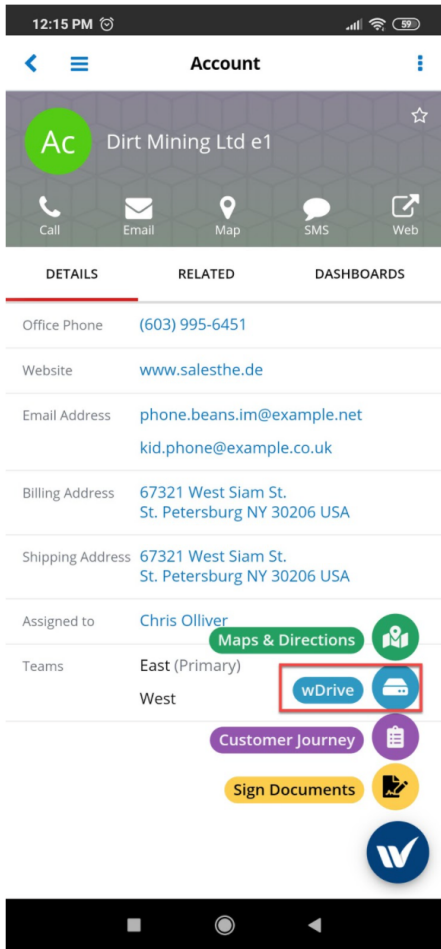
Here you will find the document created by using the **Create Sugar Document** action.



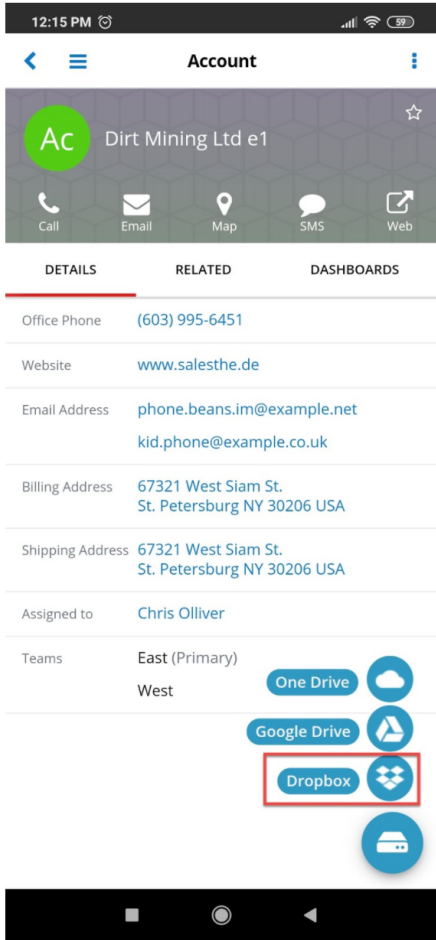
If the user tries to create a Sugar document by using the same file twice or more, wMobile for SugarCRM will raise a warning:



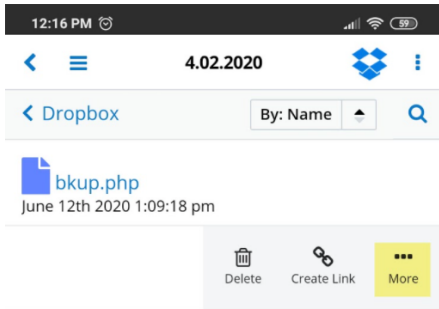
This action can also be used for **Record View**. For this, navigate to an account's Record View and press on the **wDrive** widget.



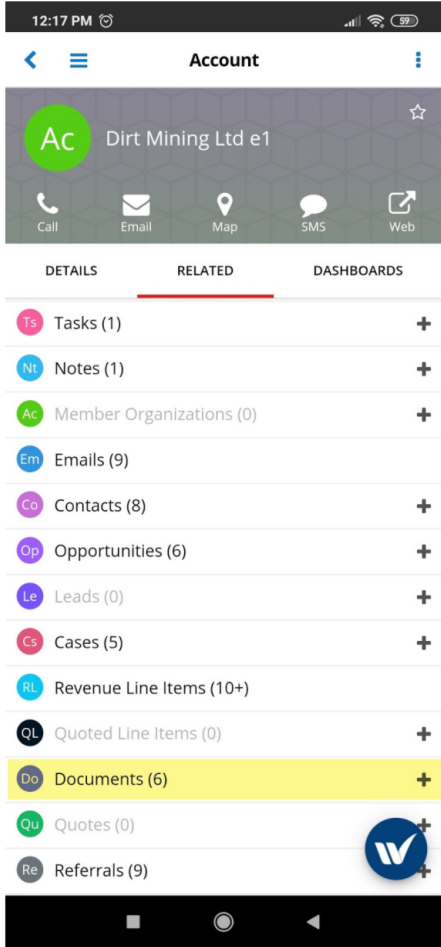
Select a Dropbox file and slide on it.

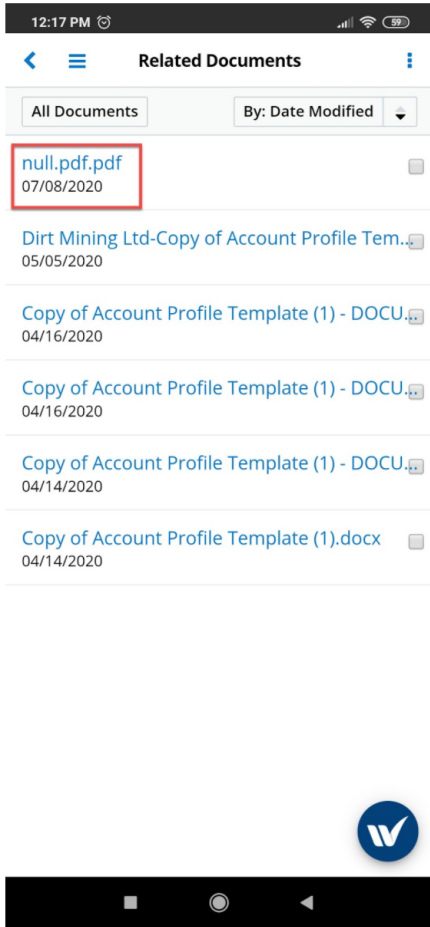


Choose the more actions option in the top right corner of the screen.



Select the **Create Sugar Document** option from the pop up screen. This will create a Sugar document that will be automatically saved to the **Documents subpanel in Record View**.

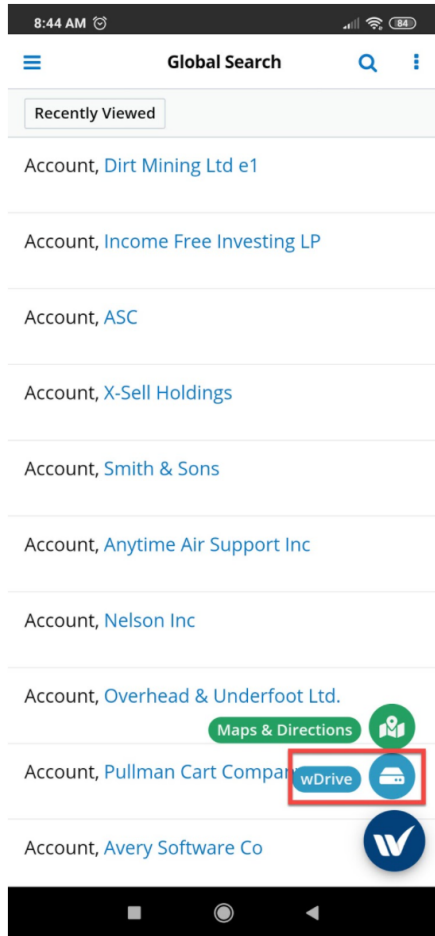




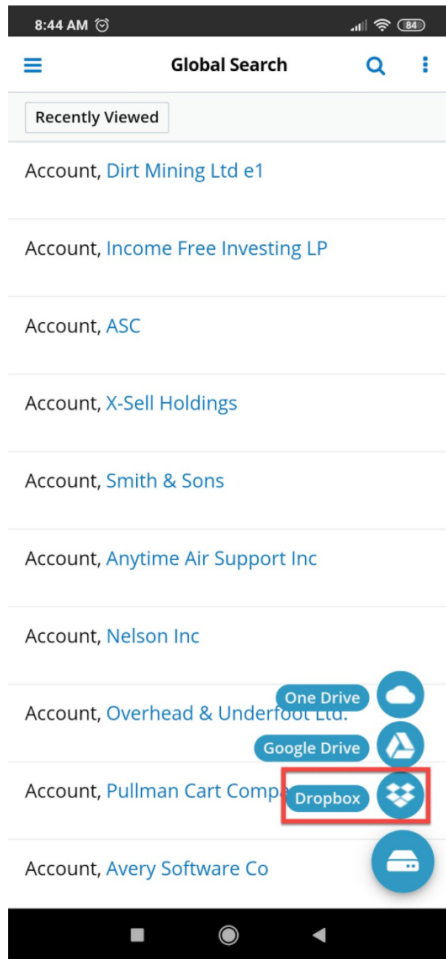
Create Folder

Users can create folders directly from the Dropbox option of the wMobile widget.

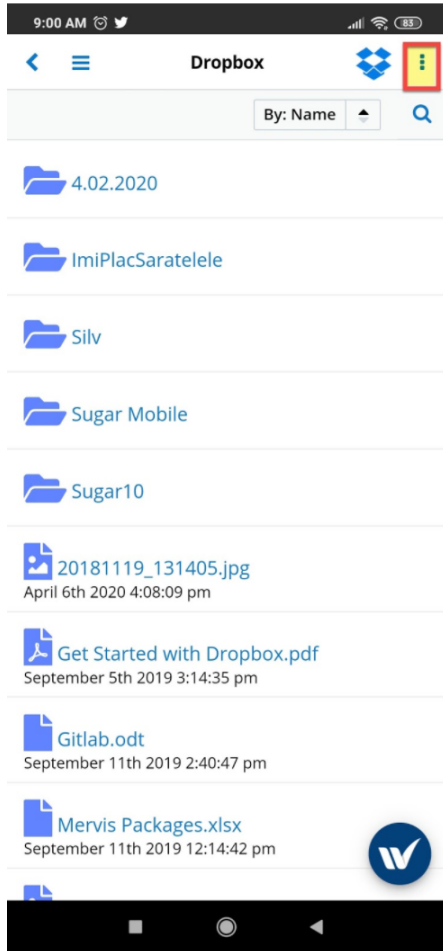
1. Navigate to the Accounts module and choose the wDrive option from the W widget.



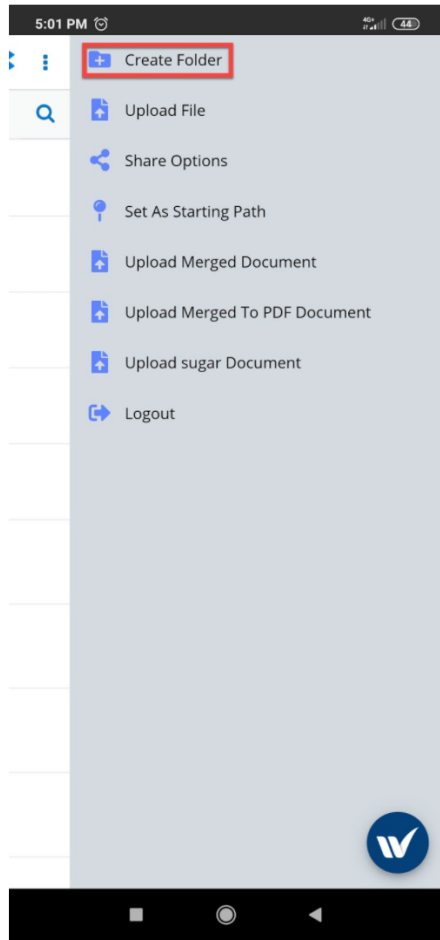
2. Choose the Dropbox option.



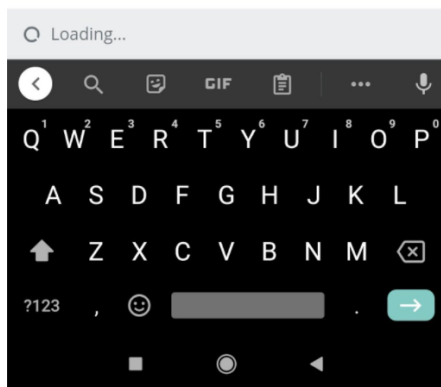
3. From the Menu Option on the top right side of the screen (the three dots),



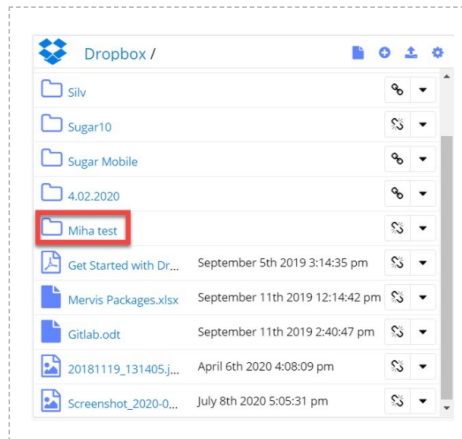
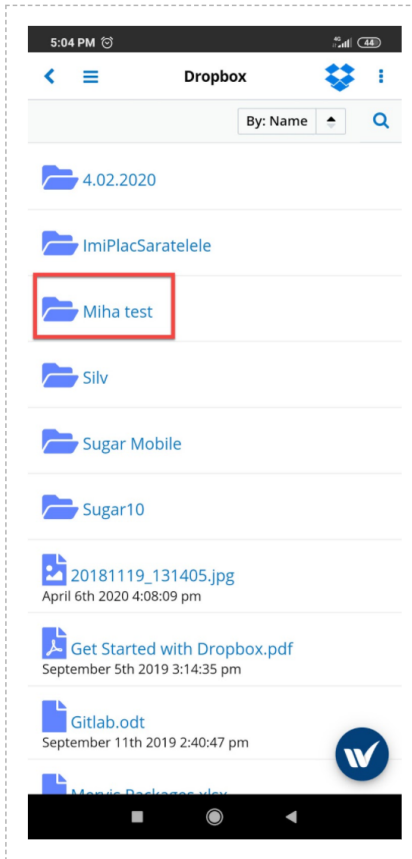
4. Tap the **Create Folder** button.



5. Name and **Save** your folder.

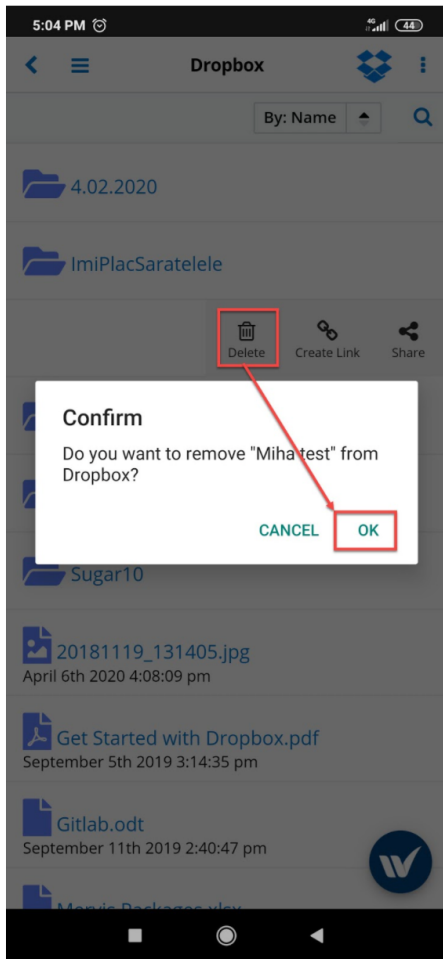


The folder will be created and saved on the Dropbox dashlet on both your mobile application but also on your desktop instance.



Deleting Files and Folders

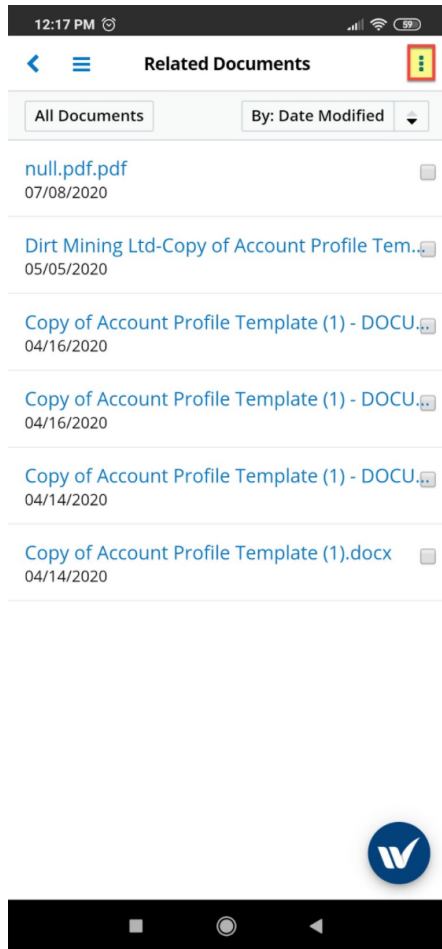
To delete files or folders from the Dropbox dashlet for wMobile for SugarCRM, slide on any document or folder and tap the **Delete** button.



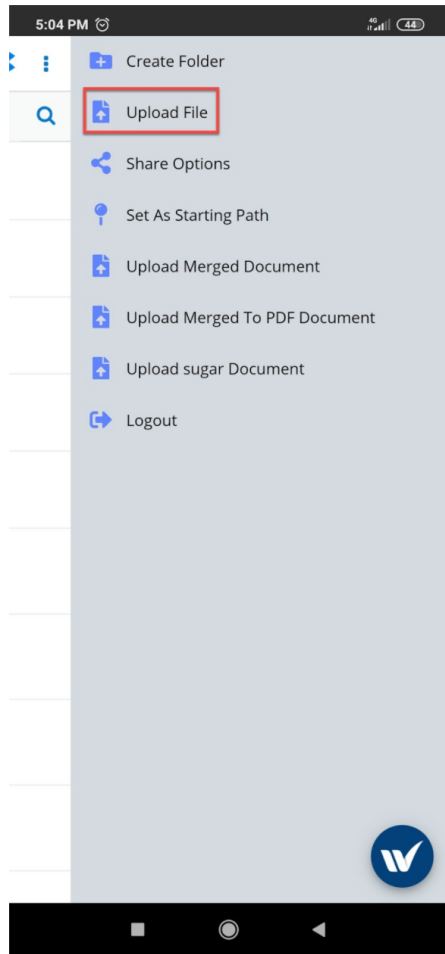
Uploading Files to Dropbox

By using the same top-right menu from the Dropbox application, users quickly upload files to the application.

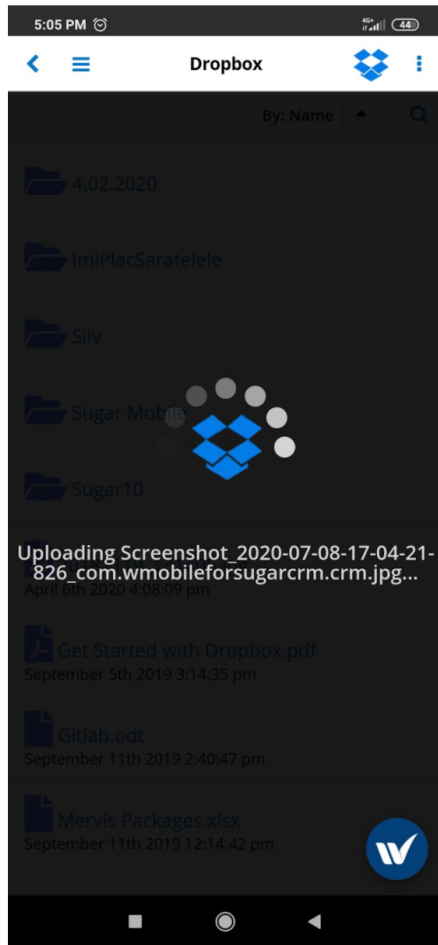
1. Tap on the three dots on the top of your screen.



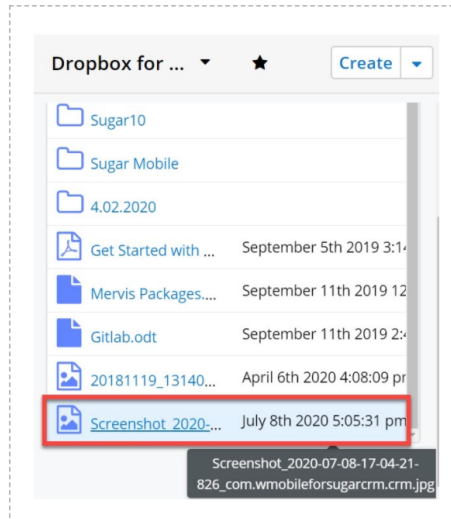
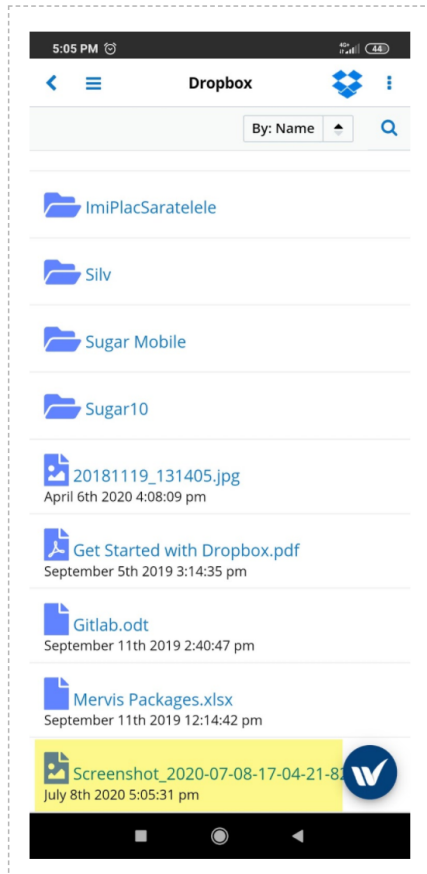
2. Tap the **Upload File** button from the menu that will appear.



3. Select the local folder from where to upload the files.
4. Tap on the file that you wish to upload to your mobile Sugar app.



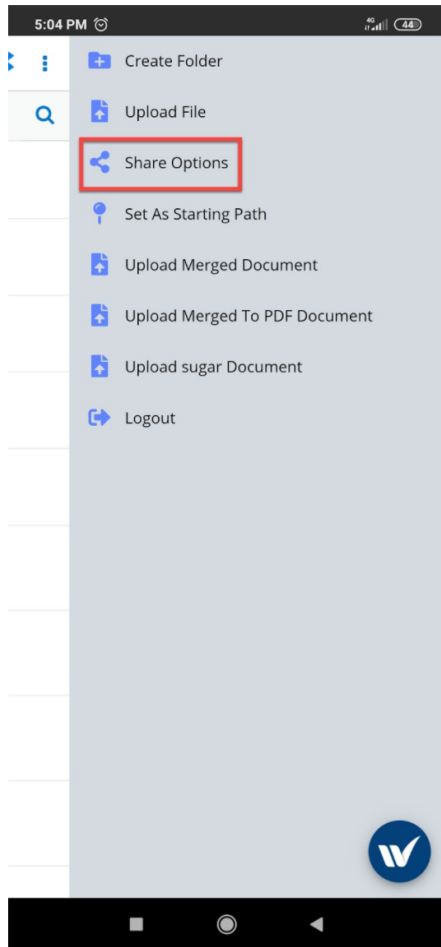
5. Once the Upload screen disappears, you will be able to find your document to the Dropbox location where you uploaded it on both the mobile application and your desktop Sugar instance.



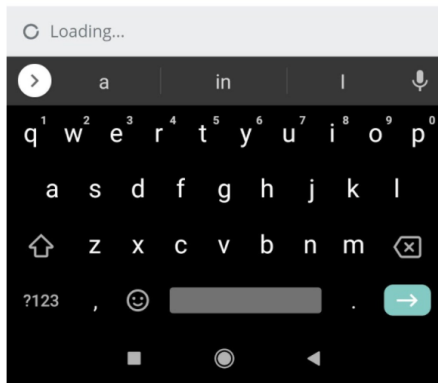
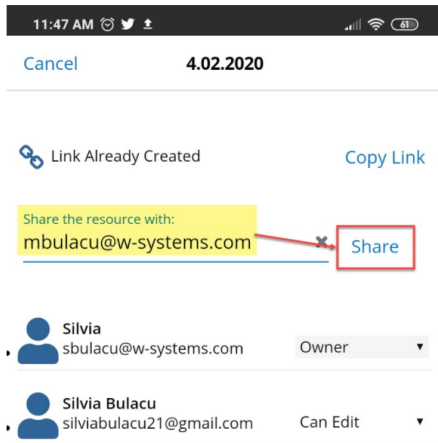
Share Options

Users can quickly share the files and folders uploaded to their Dropbox dashlets. follow the steps below to manage this.

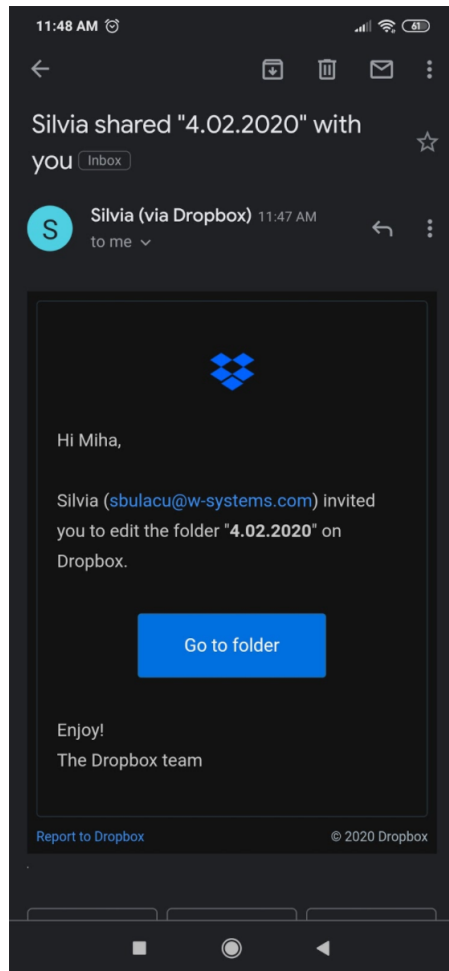
1. Go to the **Accounts Module** and tap on the **W widget**. Choose the **wDrive** option available there.
2. Go to the right menu and press **Share Options**.



3. Open a file and tap on the right Menu; select Share Options.
4. Enter a valid email address and press Share.

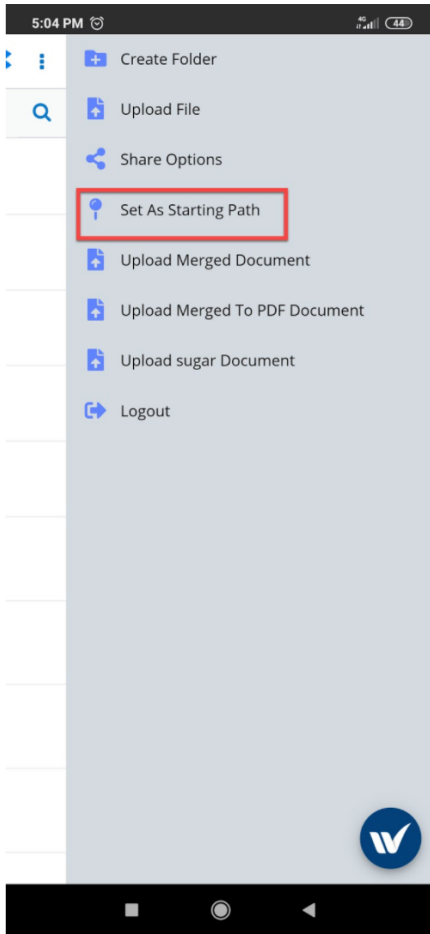


5. An email with the link to the shared file will be sent to the email address provided.



Set as Starting Path

When within a folder, users can set that folder as a new starting path. If the user wants to add a custom starting path (if not added in **Administration**), they can select which folder will be the starting path for the Dropbox dashlet, then tap on the top right menu (the three dots).



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.

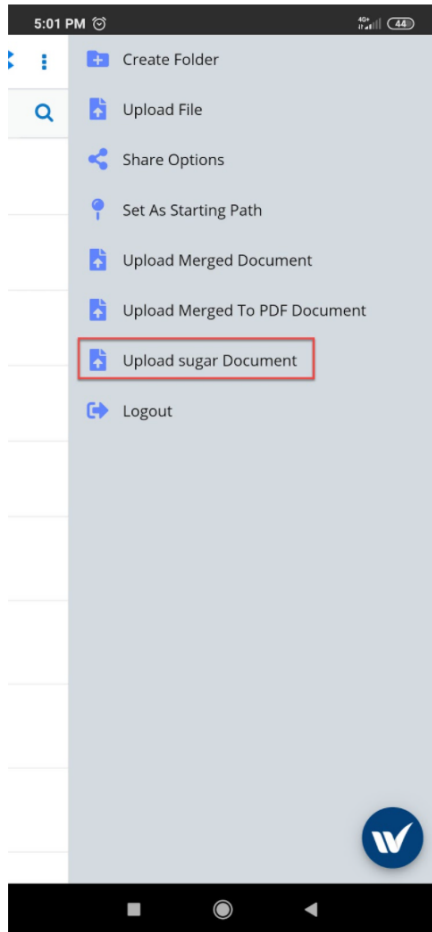
Custom paths can be defined on either **List View** or **Record View**.

Upload Sugar Documents

Users can quickly upload Sugar Documents to their Dropbox Integration with wDrive for Mobile.

To manage this, go to the Accounts module, open a record, and tap on the W widget.

1. Select wDrive.
2. Open the Dropbox integration.
3. Tap on the Right menu (the three dots on top of the screen).
4. Select Upload Sugar Documents and check that the document is uploaded into Dropbox, after the right path is created.



Google Drive

The Google Drive Integration with wDrive for wMobile for SugarCRM shares the same functionality with the Dropbox Integration. To perform any of the actions described in the Dropbox section, but with Google Drive, tap on the Google Drive integration instead.

Please refer to the steps above for any Google Drive integration functions and actions.

One Drive

The OneDrive Integration with wDrive for wMobile for SugarCRM shares the same functionality with the Dropbox Integration. To perform any of the actions described in the Dropbox section, but with the OneDrive Integration, tap on the OneDrive integration instead.

Please refer to the steps above for any OneDrive integration functions and actions.

wDocs Integration with wMobile for SugarCRM

- [Administering the wDocs Integration with wMobile for SugarCRM](#)
- [Using the wDocs Integration with wMobile for SugarCRM](#)

Administering the wDocs Integration with wMobile for SugarCRM

To ensure proper use and deployment of this integration, make sure that you follow the [configuration](#) steps available in the [wDocs User Guide](#).

Before using the wDocs integration with wMobile for SugarCRM on your mobile, ensure that you make all modules visible for mobile, from your desktop Sugar Instance. If this step was already configured for another wMobile for SugarCRM package, please disregard this configuration step.

Note: You must be a SugarCRM administrator to make the necessary changes to complete the configuration described in this section.

Go to the **Administration** page.

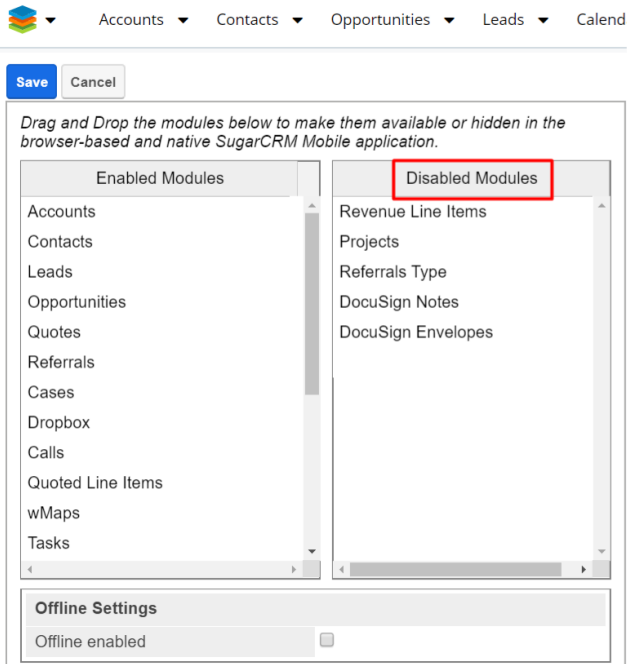
From the **System** section of the **Administration** page, open the **Mobile** page.

System

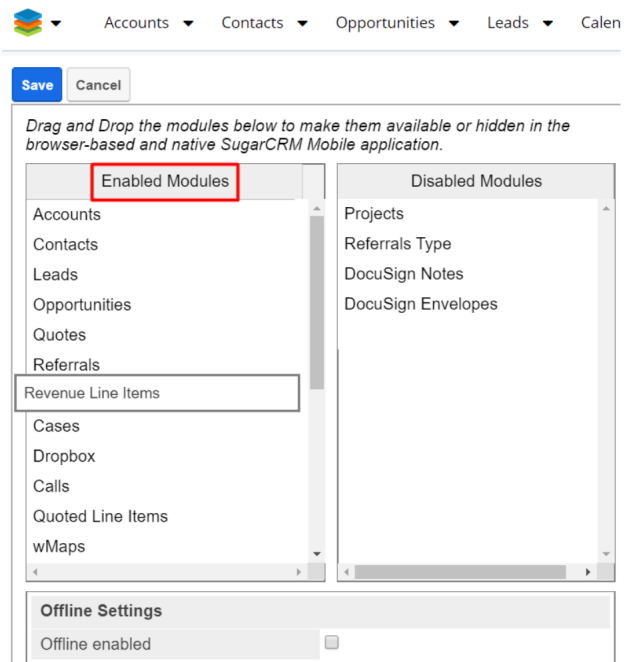
Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings within their user settings page.

System Settings	Configure system-wide settings	Import Wizard	Use the import wizard to easily import records into the system
Locale	Set default localization settings for your system	Upgrade Wizard	Upload and install Sugar upgrades
Currencies	Set up currencies and conversion rates	Languages	Manage which languages are available for users
Repair	Check and repair Sugar	Search	Select modules for the Global Search and configure full-text searching.
Diagnostic Tool	Capture system configuration for diagnostics and analysis	Connectors	Manage connector settings
Tracker	Enable/Disable tracking	Scheduler	Set up scheduled events
PDF Manager	Manage templates for generated PDF files	Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application
Web Logic Hooks	Manage Sugar Web Logic Hooks	OAuth Keys	OAuth key management

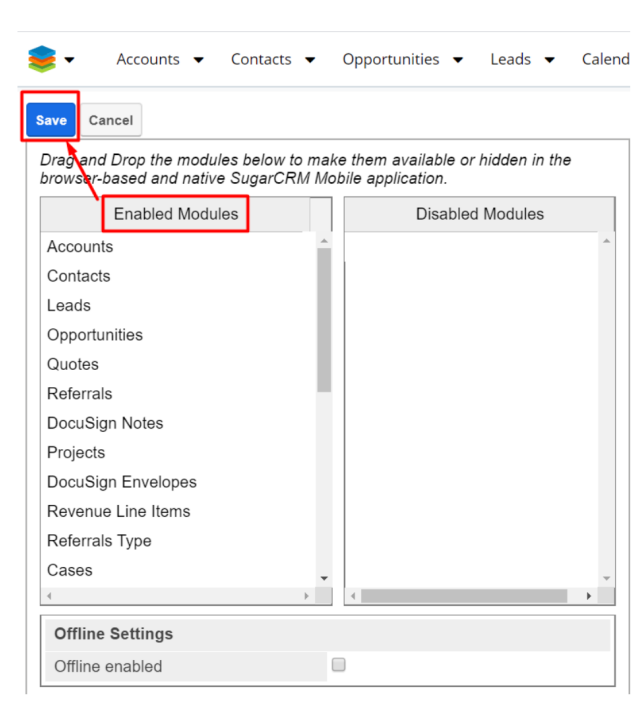
From the **Mobile** page, make all Modules available in the **Disabled Module** column visible for the mobile app.



To manage this, drag and drop each module to the **Enabled Modules** panel.



Once you enable all the available modules from the **Disabled Modules** panel, **Save** your new configuration.



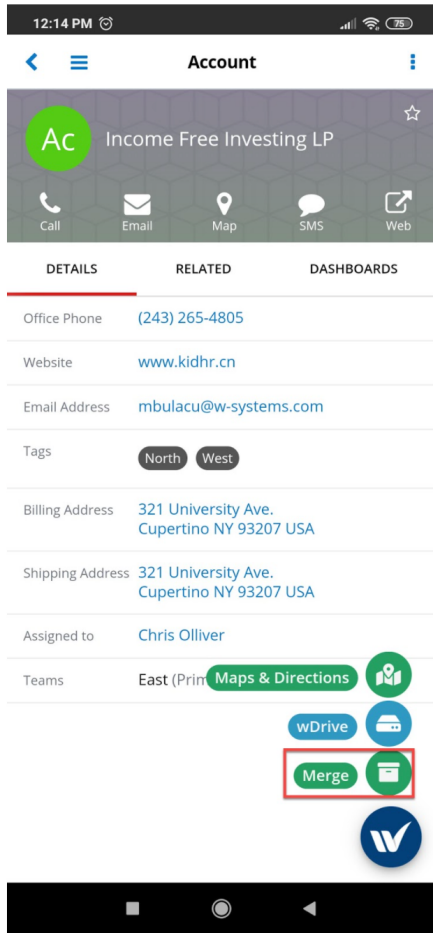
Note: The package configuration should be carried out on your desktop Sugar instance.

Using the wDocs Integration with wMobile for SugarCRM

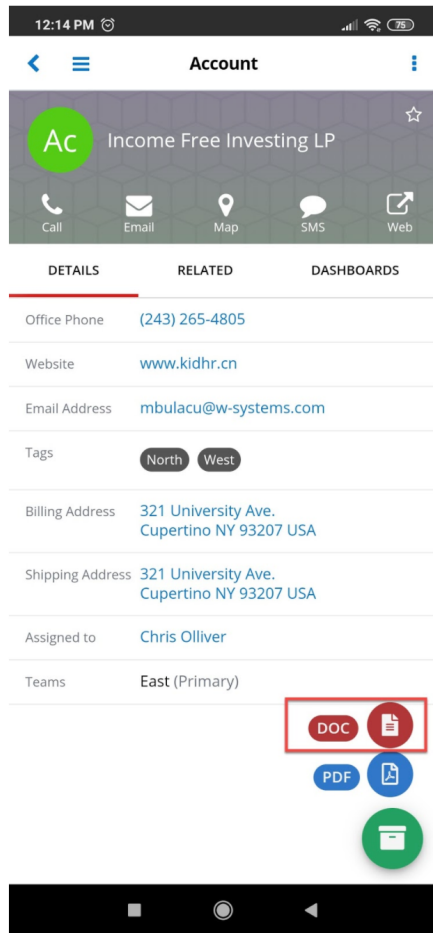
Single Record Merge

The wDocs integration with wMobile for SugarCRM supports single merge actions for PDF, Microsoft Word and Microsoft Excel files. The Single Merge action is available for both record view and list view.

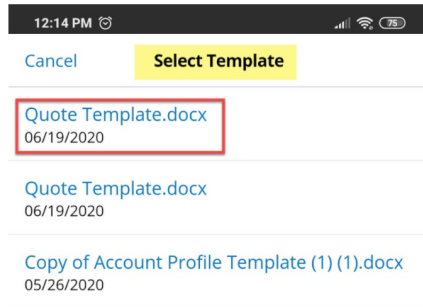
1. To use the Single Merge function, go to a module for which you have Document templates created in the Documents module (Accounts module, in this example).
2. Tap on the W widget and choose the Merge Document action.



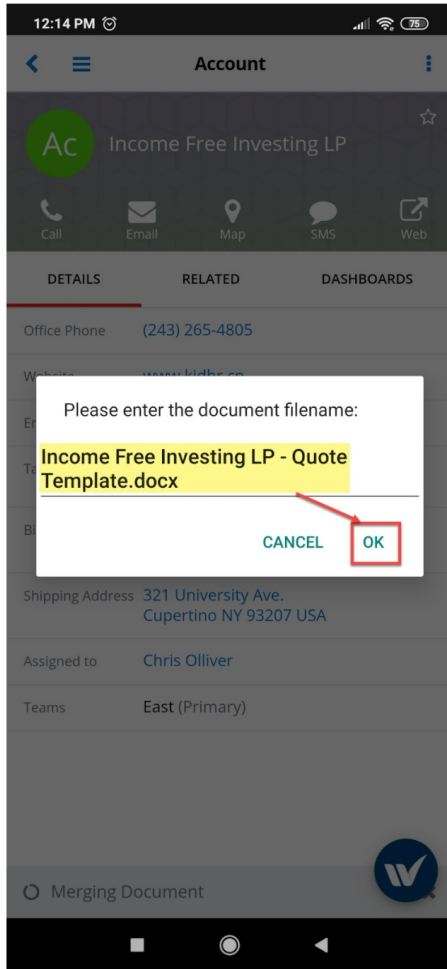
3. Select what type of file you want to merge your information into.



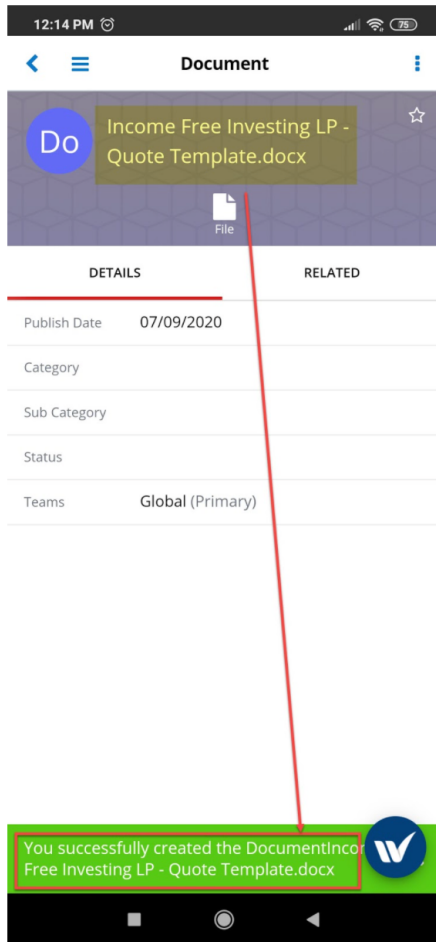
4. A new screen with document templates will open once you select your file type. Choose the template from the drawer.



5. Name your merged document and press OK.

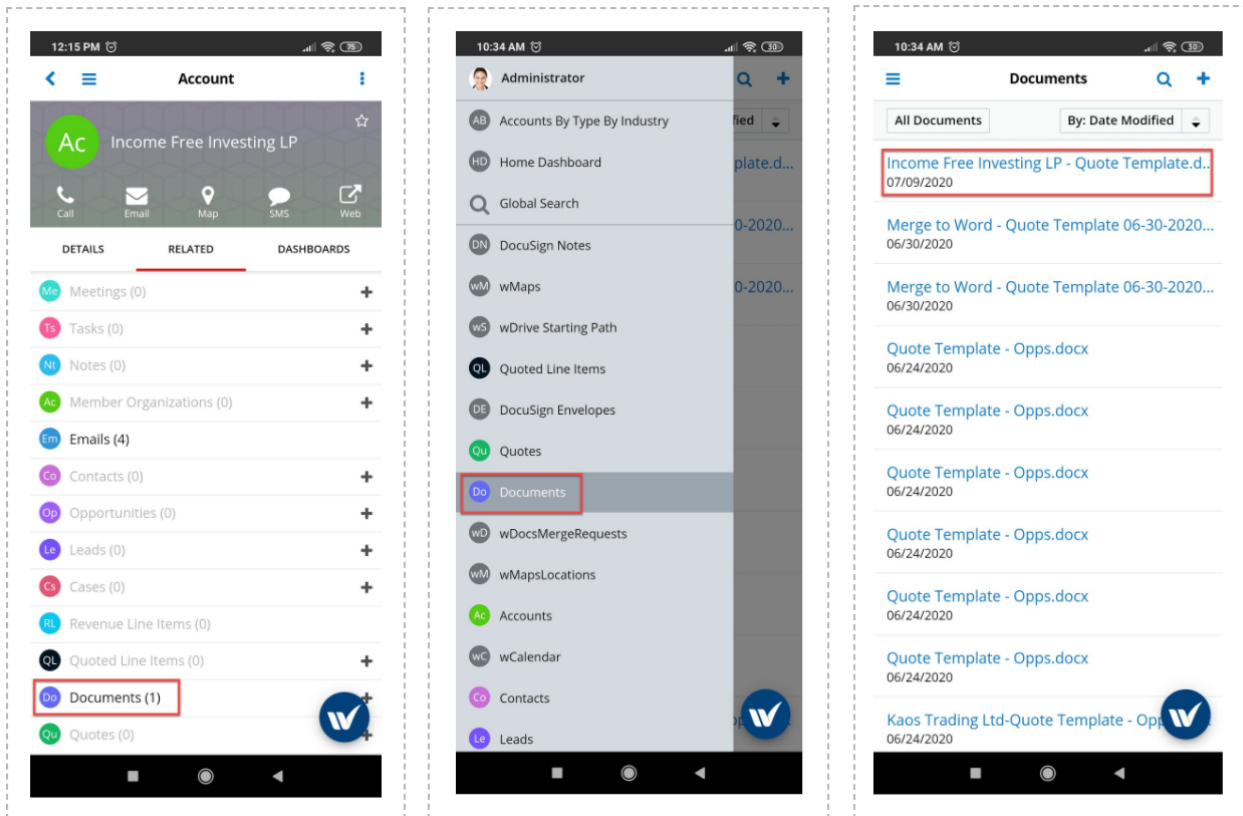


6. Once the merge is complete, you will be notified by a pop up on the bottom of the screen.



7. The name of the document will be, by default, the name of your selected record followed by the name of the template used for the merge, as you can observe above.

The merged documents will be automatically saved on the Documents Subpanel in record view, and in the Documents module.



Once the merge is complete, you can download it to your local device.

wMaps Integration with wMobile for SugarCRM

- [Administering the wMaps Integration with wMobile for SugarCRM](#)
- [Using the wMaps Integration with wMobile for SugarCRM](#)

Administering the wMaps Integration with wMobile for SugarCRM

To ensure proper use and deployment of this integration, make sure that you follow the [configuration](#) steps available in the [wMaps User Guide](#).

Before using the wMaps integration with wMobile for SugarCRM on your mobile, ensure that you make all modules visible for mobile, from your desktop Sugar Instance. If this step was already configured for another wMobile for SugarCRM package, please disregard this configuration step.

Note: You must be a SugarCRM administrator to make the necessary changes to complete the configuration described in this section.

Go to the **Administration** page.

From the **System** section of the **Administration** page, open the **Mobile** page.

System

Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings within their user settings page.

System Settings	Configure system-wide settings	Import Wizard	Use the import wizard to easily import records into the system
Locale	Set default localization settings for your system	Upgrade Wizard	Upload and install Sugar upgrades
Currencies	Set up currencies and conversion rates	Languages	Manage which languages are available for users
Repair	Check and repair Sugar	Search	Select modules for the Global Search and configure full-text searching.
Diagnostic Tool	Capture system configuration for diagnostics and analysis	Connectors	Manage connector settings
Tracker	Enable/Disable tracking	Scheduler	Set up scheduled events
PDF Manager	Manage templates for generated PDF files	Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application
Web Logic Hooks	Manage Sugar Web Logic Hooks	OAuth Keys	OAuth key management

From the **Mobile** page, make all Modules available in the **Disabled Module** column visible for the mobile app.

Accounts Contacts Opportunities Leads Calend

Save Cancel

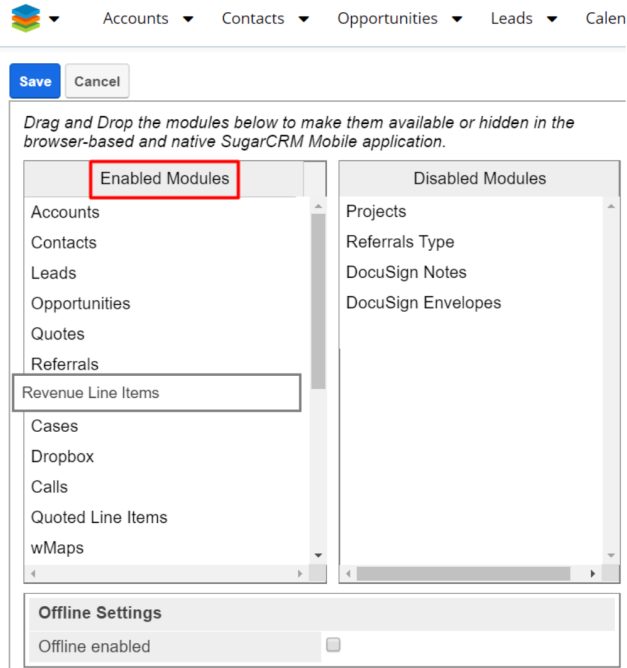
Drag and Drop the modules below to make them available or hidden in the browser-based and native SugarCRM Mobile application.

Enabled Modules	Disabled Modules
Accounts	Revenue Line Items
Contacts	Projects
Leads	Referrals Type
Opportunities	DocuSign Notes
Quotes	DocuSign Envelopes
Referrals	
Cases	
Dropbox	
Calls	
Quoted Line Items	
wMaps	
Tasks	

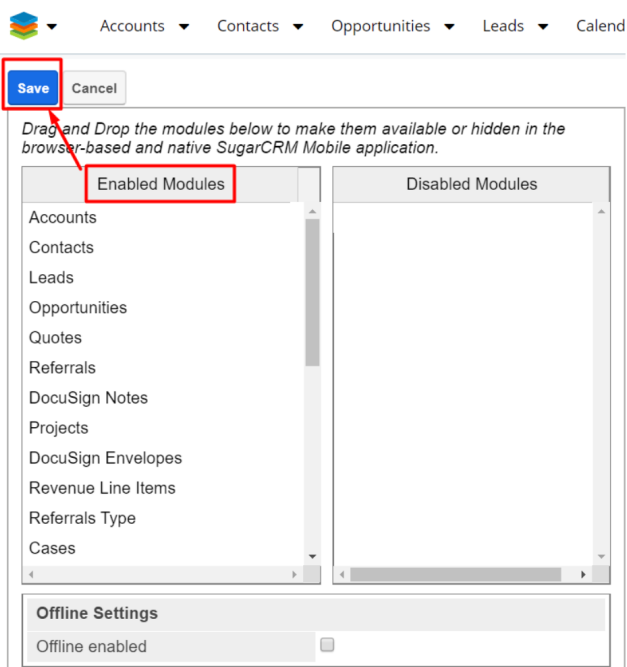
Offline Settings

Offline enabled

To manage this, drag and drop each module to the **Enabled Modules** panel.



Once you enable all the available modules from the **Disabled Modules** panel, **Save** your new configuration.



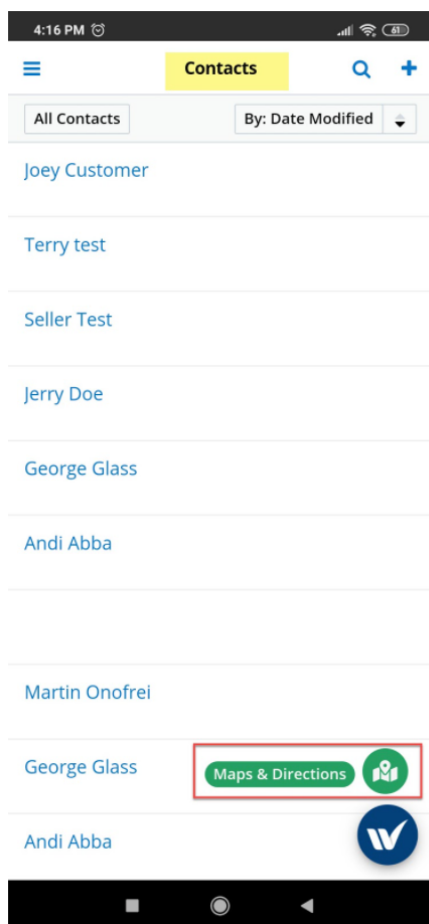
Note: The package configuration should be carried out on your desktop Sugar instance.

Using the wMaps Integration with wMobile for SugarCRM

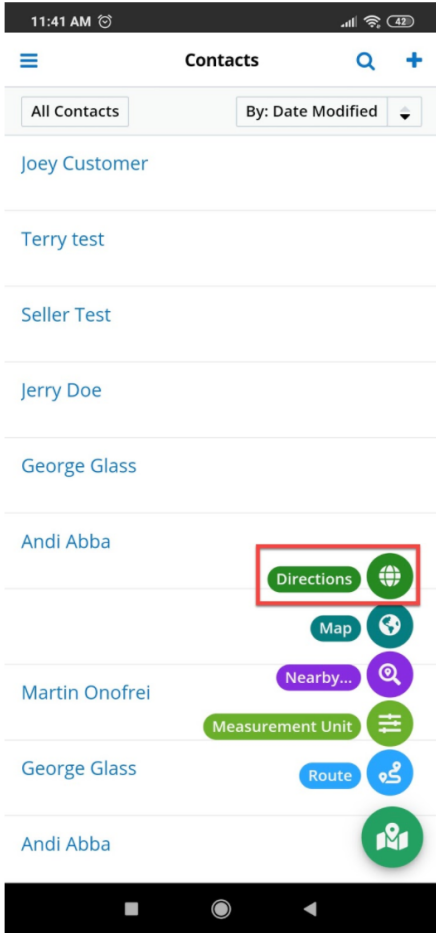
List View

- **List View Directions**

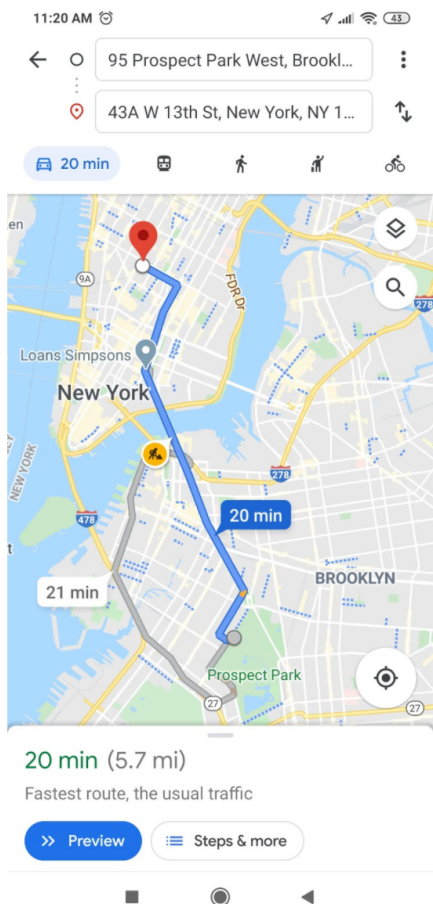
Users can generate directions between their mobile devices and the location of geocoded records of a module, on a map. To generate directions, tap on the W widget in list view, in a module where you have the wMaps integration with wMobile for SugarCRM configured. Select Maps & Directions.



From the new menu that will appear, select **Directions**.

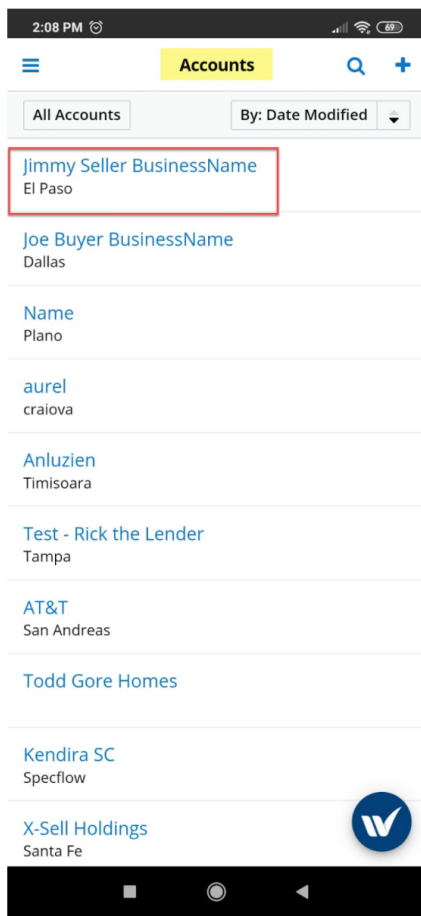
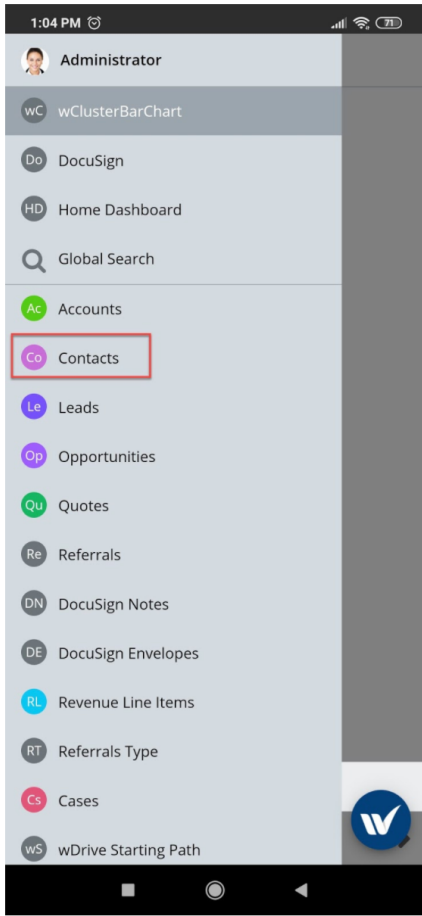


A new map with directions between your local device and geocoded records will be generated.

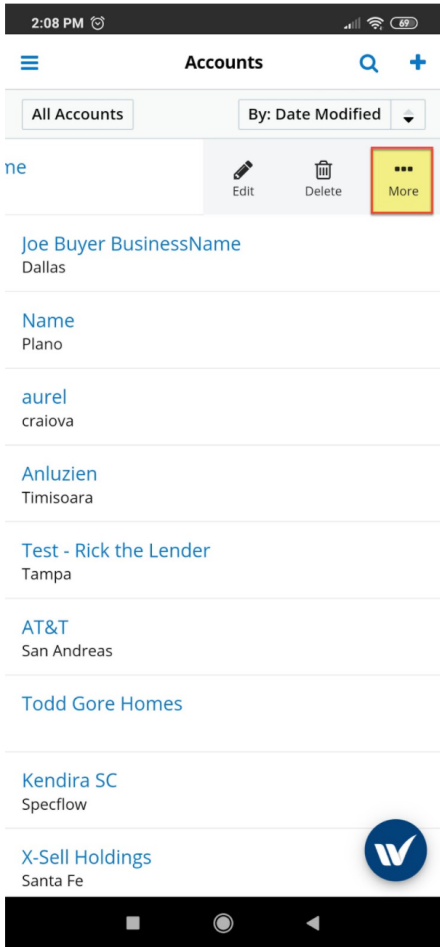


- **List View Map**

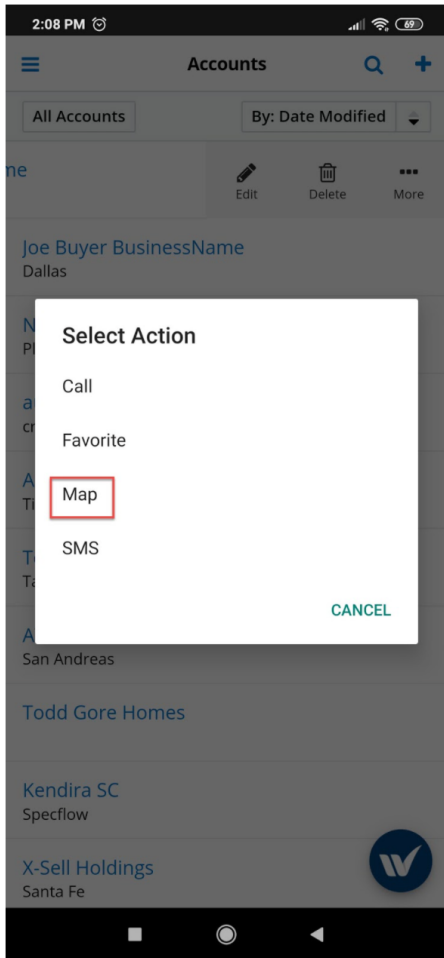
Open the wMobile for SugarCRM app on your mobile device. Go to a Module for which you have the wMaps Integration with wMobile for SugarCRM configured.



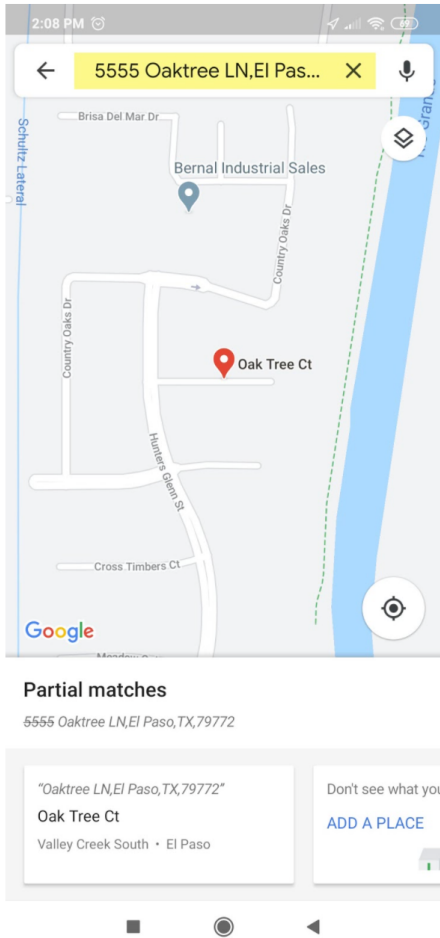
Choose a record and slide on it. Tap on the three dots for More options.



A popup window will open. Choose Map from the options available.

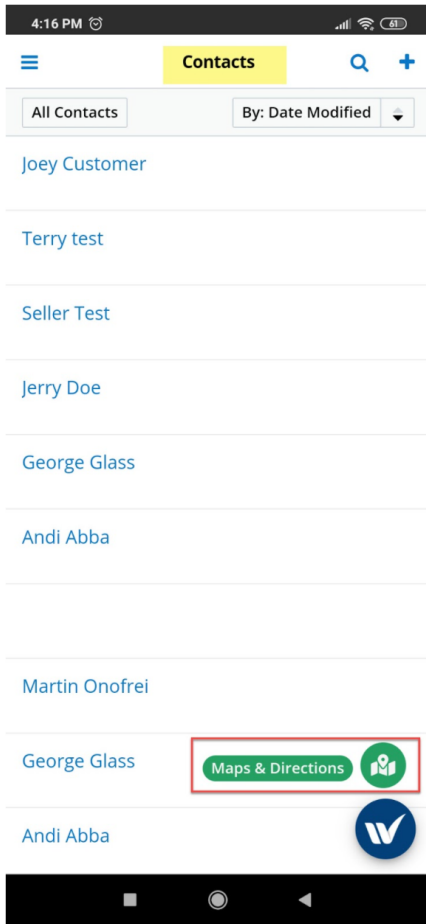


The next view you will be provided with is a view of the record, mapped.

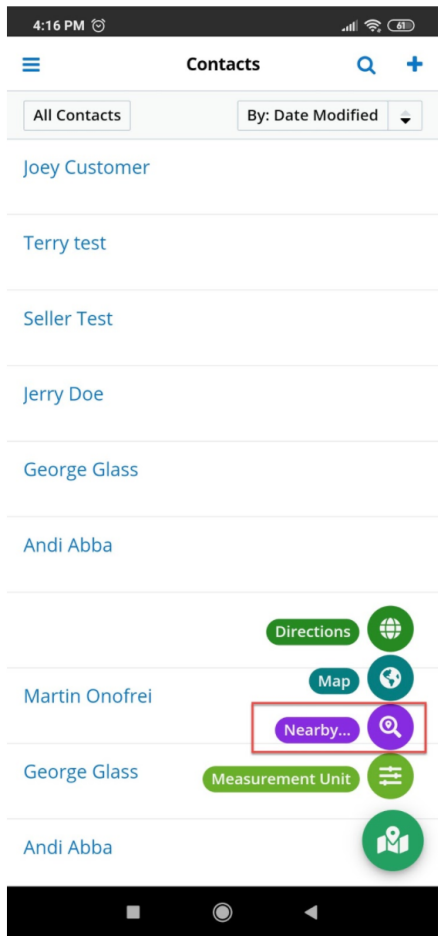


- **List View Nearby**

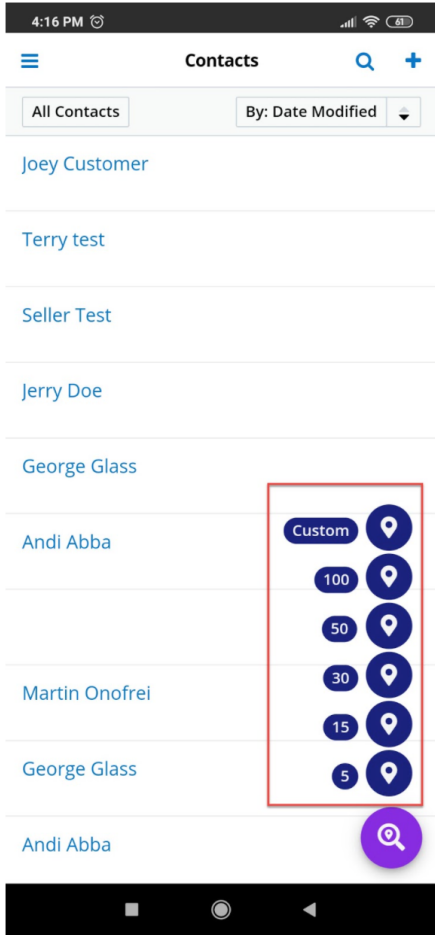
Users can also filter records in List View by distance from the device. To manage this, open the wMobile for SugarCRM app on your mobile device. Go to a module where you have the wMaps package configured, tap on the W widget and choose the **Maps & Directions** option.



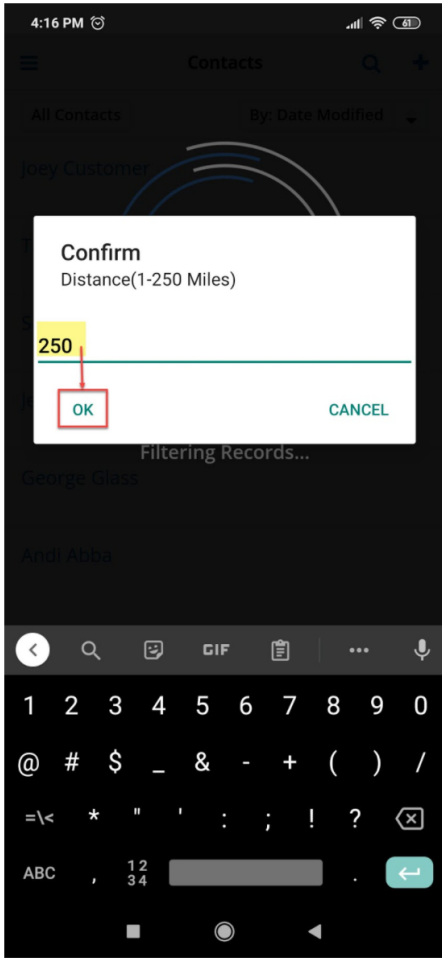
From the available options, select **Nearby**.



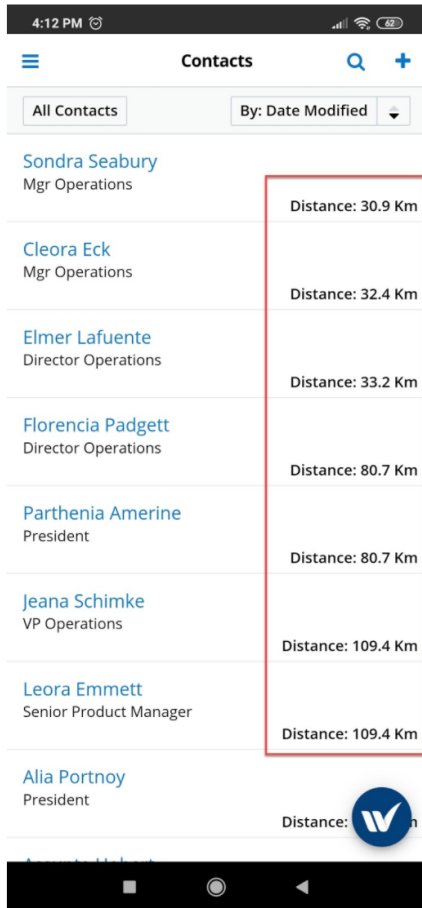
You will be provided with multiple distance options to filter your records from, but also with a Custom distance option. Here you can input values between 1 and 250 miles. For this example, we will use the **Custom** distance option.



For this example, we will set the **Custom** distance filter to 250 miles and press **OK**.



A new **List View** of the module selected (Contacts in our example) will open with the filtered records within the set distance from the mobile device the search was performed from. Next to the name of each record will be displayed the distance from the mobile device the search was performed on.



Record View

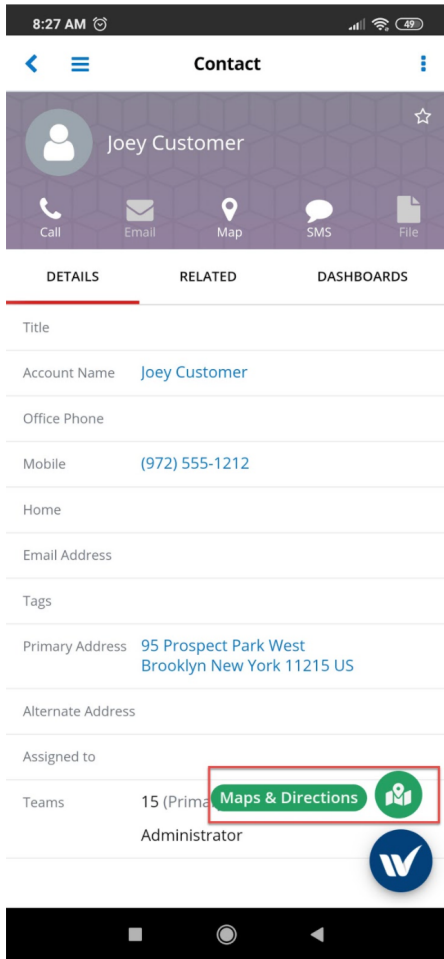
- **Record View Directions**

Users can also generate directions between geocoded records. First, an admin must add the following two fields to the Mobile DetailView layout:

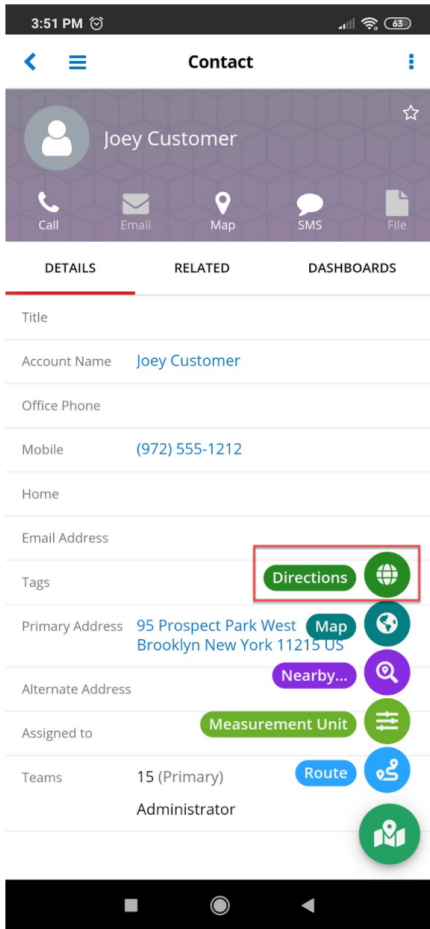
- Geocoding Latitude
- Geocoding Longitude

For more information on editing the Mobile DetailView, refer to the [Studio](#) documentation in the Sugar Administration Guide.

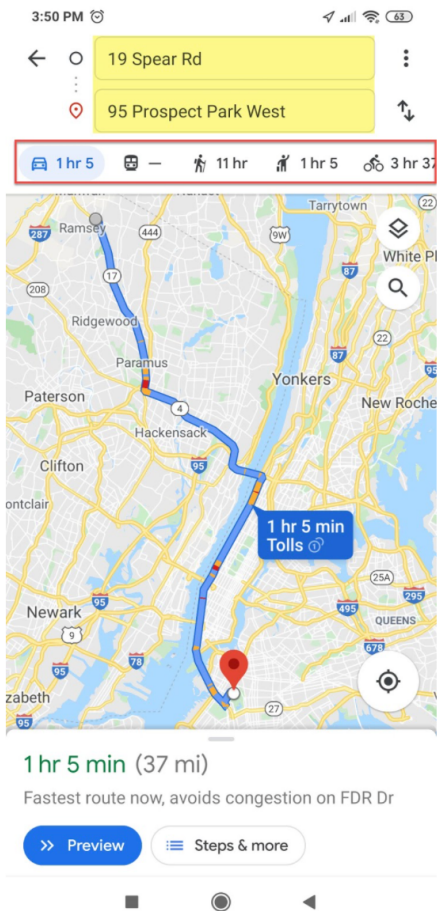
To generate directions between geocoded records, open the wMobile for SugarCRM app on your mobile device, go to Record View on a module where you have the wMaps configured and tap on the W widget.



Choose the Maps & Directions option available.



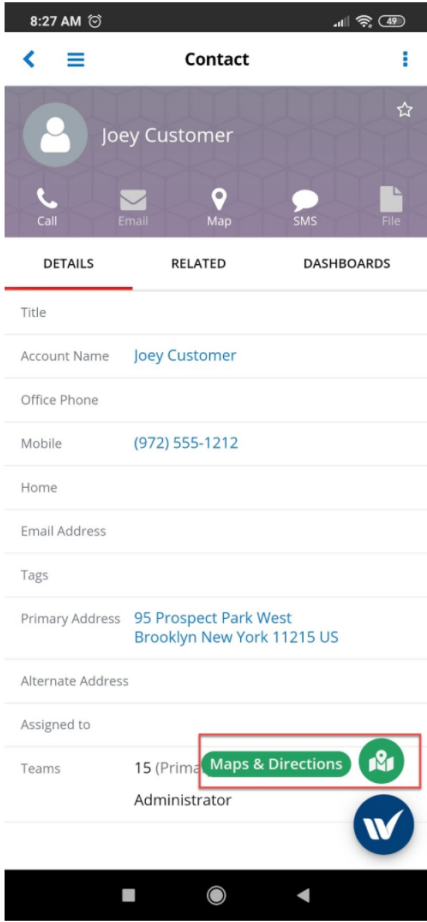
Doing so will open a few mapping actions. To generate directions between your device's location and the record you are viewing, select the Directions option available in the menu.



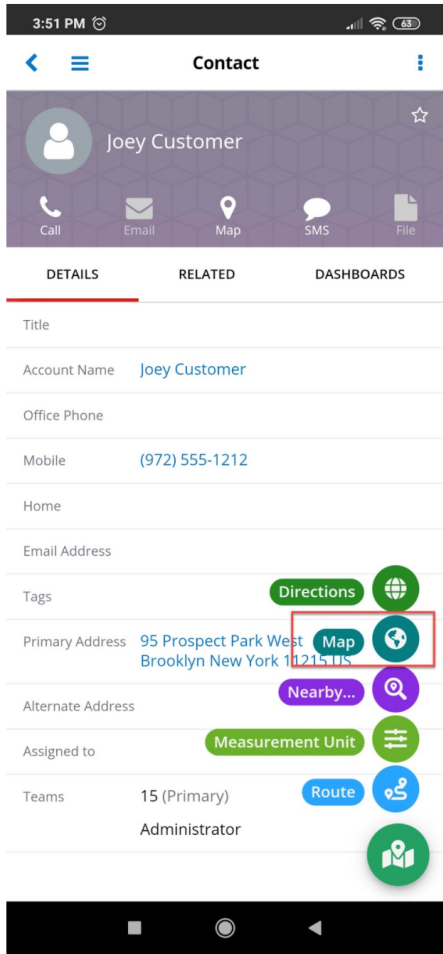
You will be provided with a map of the fastest route, and the necessary time to get to your destination by using different transportation methods.

- **Record View Map**

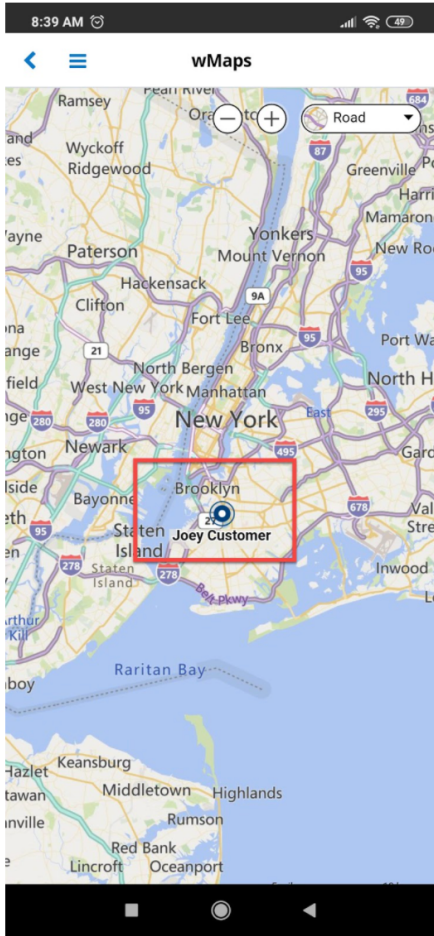
The wMaps integration with wMobile for SugarCRM also allows users to see the record's location on a pushpin on a map. To manage this, navigate to the **W widget** and choose **Map & Directions**.



From the available options, choose Map.

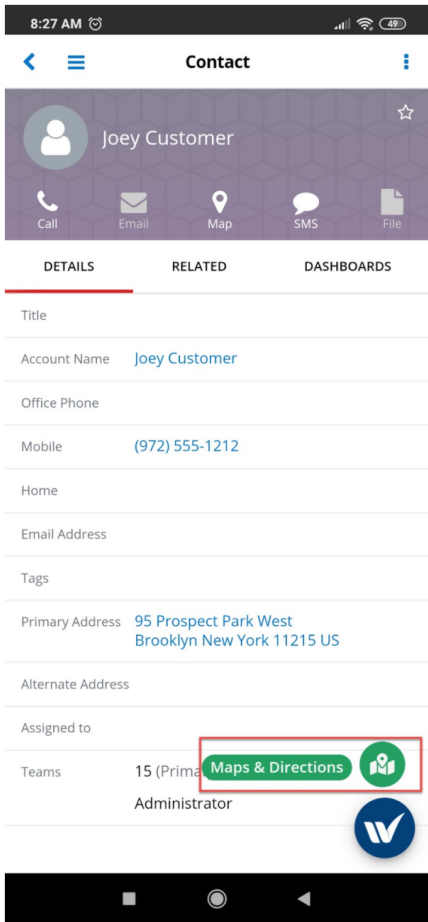


A map with a pushpin location of the record will open immediately.

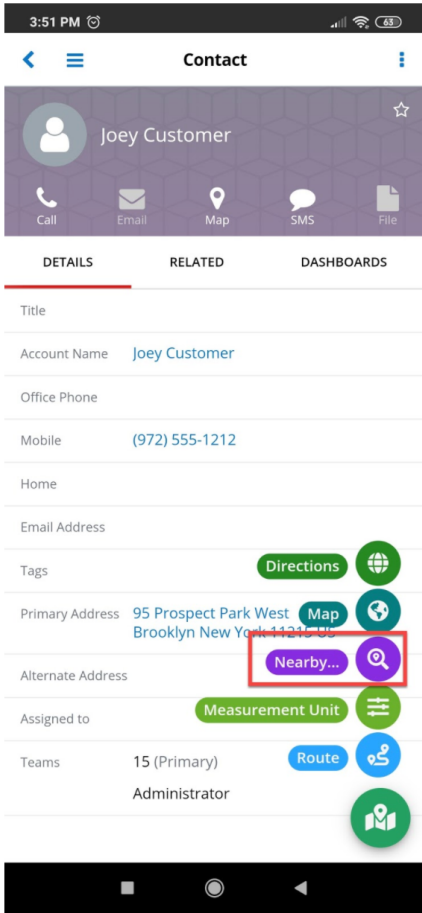


- **Record View Nearby**

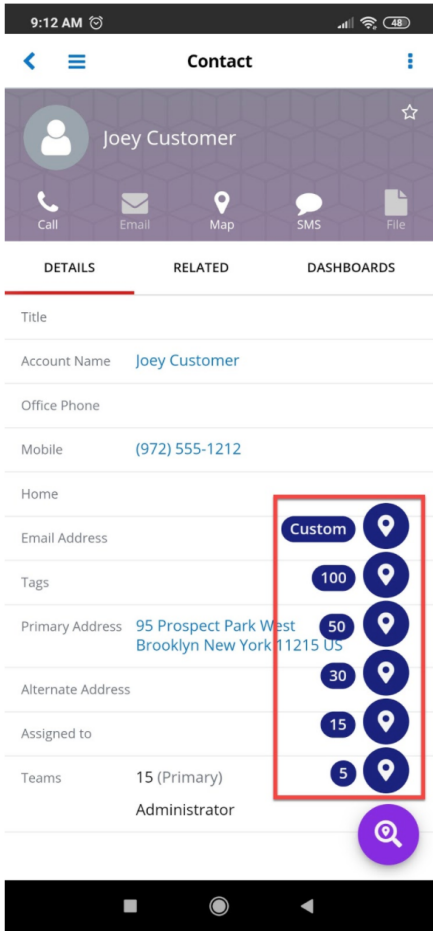
If you plan to visit more records at once in your field work, you can easily find records geocoded in the proximity of your initial record. To manage this, tap on the W widget and choose Map & Directions.



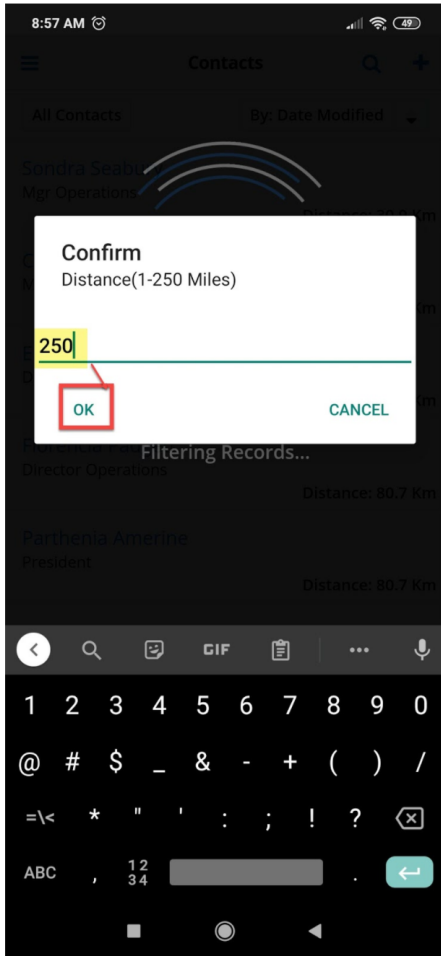
You will be provided with multiple mapping options. Choose **Nearby**.



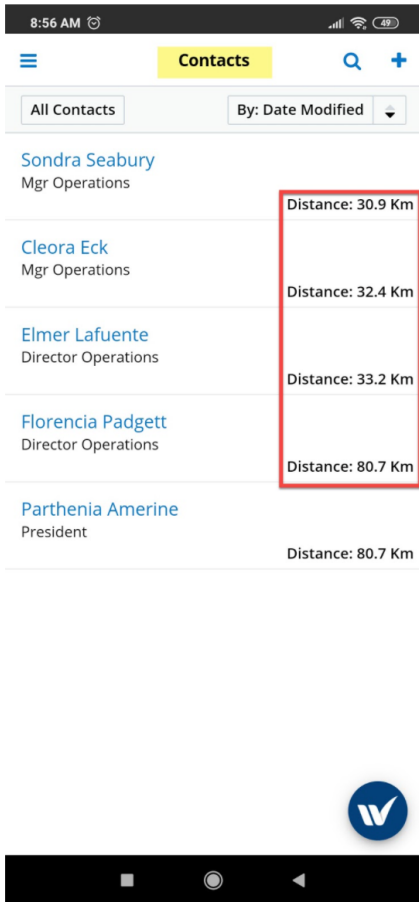
You will be provided with multiple distance options to filter your records from, but also with a Custom distance option. Here you can input values between 1 and 250 miles.



For this example, we will use the **Custom** distance option. Once you tap on the Custom option, a popup window where you can enter your distance will open.

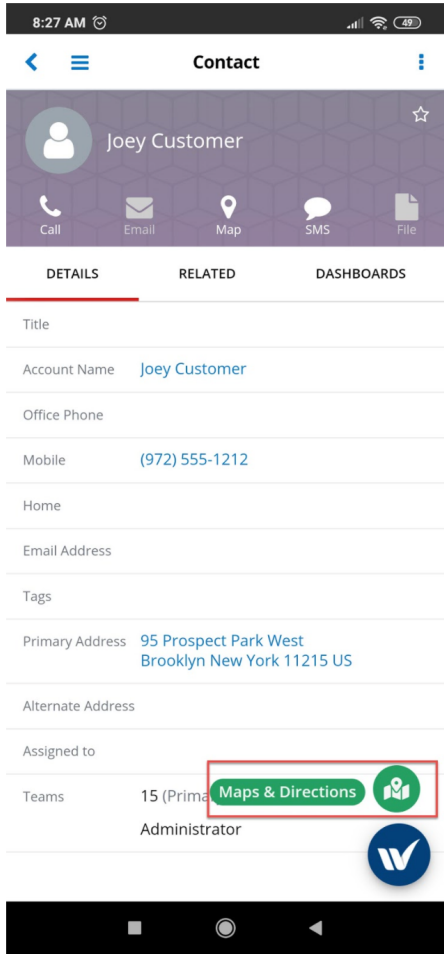


Once you enter your distance, press OK. A new List View of the module where you find yourself in will open, with records filtered within the distance selected. Next to each record will be the distance from the starting record.

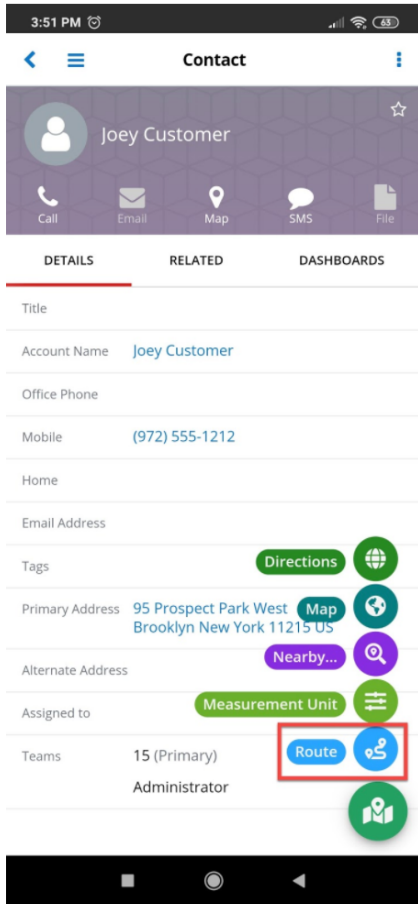


- **Record View Route**

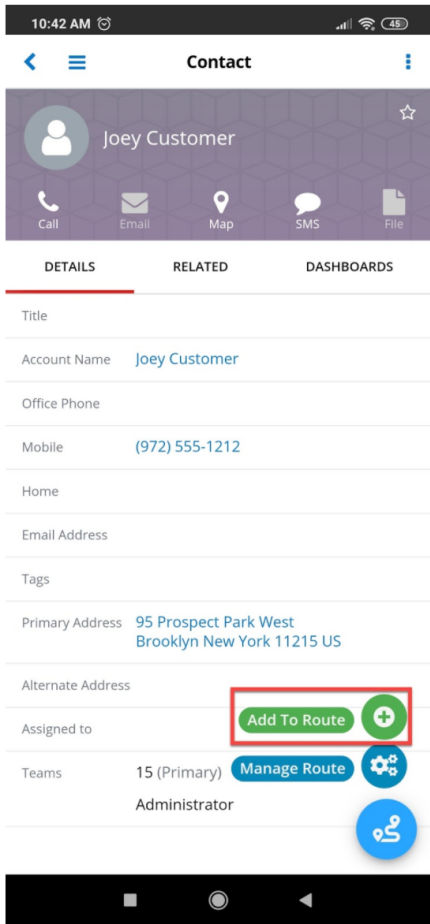
Users can define a route between geocoded records. To manage this, open the wMobile for SugarCRM app on your mobile device, go to a module where you have geocoded records and open a geocoded record in Record View. Tap on the W widget and choose Maps & Directions.



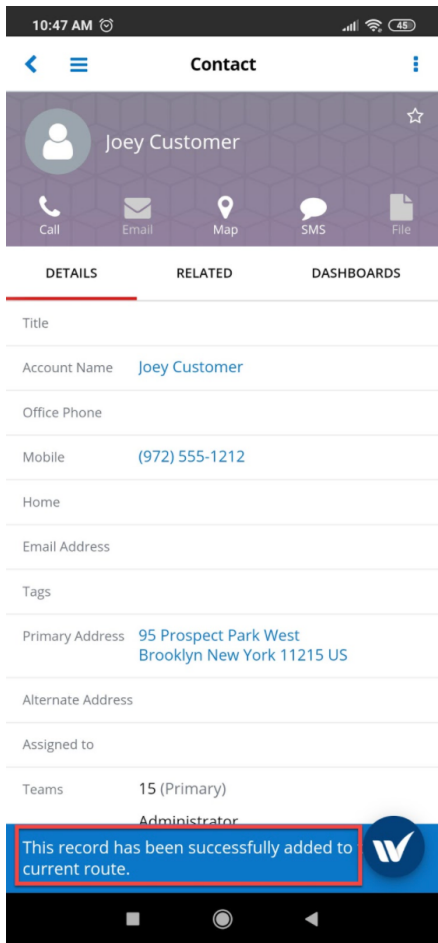
From the mapping options available, choose Route.



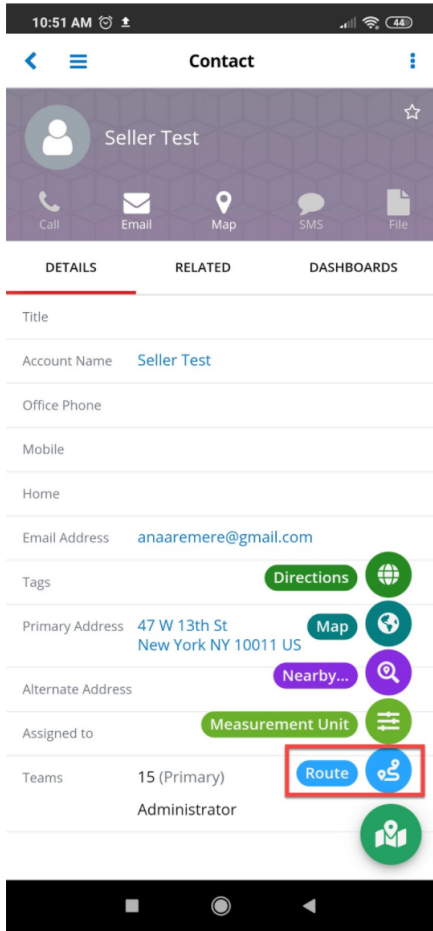
Two options will appear: **Add to Route** and **Manage Route**. Select the Add to Route option.



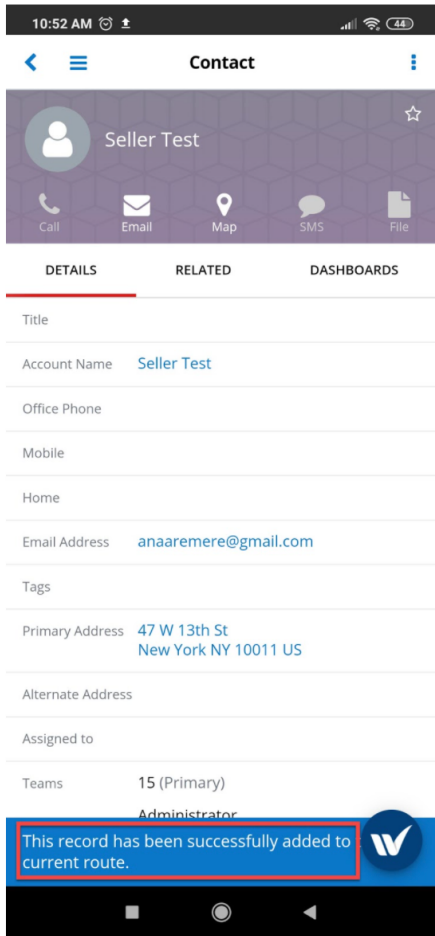
Once you tap on the Add to Route option, the "This record has been successfully added to current route" popup message will appear at the bottom of the screen:



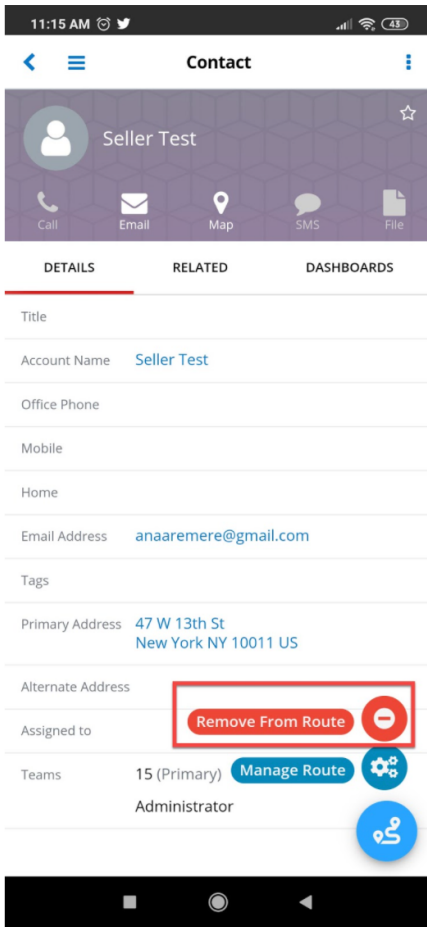
Now, go to the same module on a different geocoded record. Tap on the W widget and choose Maps & Directions.



Select **Route** and then the **Add to Route** option. The same popup message will be displayed.



Users can also remove records that were previously added to the Route by going to the record in Record View. Tap on the W widget and select the Route option. Now, instead of the **Add to Route** option, the **Remove from Route** option will be displayed. Select the option to remove the record from the route.



Attachments Fields Integration with wMobile for SugarCRM

- [Administering the Attachments Fields Integration with wMobile for SugarCRM](#)
- [Using the AttachmentsFields with Sugar Desktop Versions](#)
- [Using the Attachments Fields Integration with wMobile for SugarCRM](#)

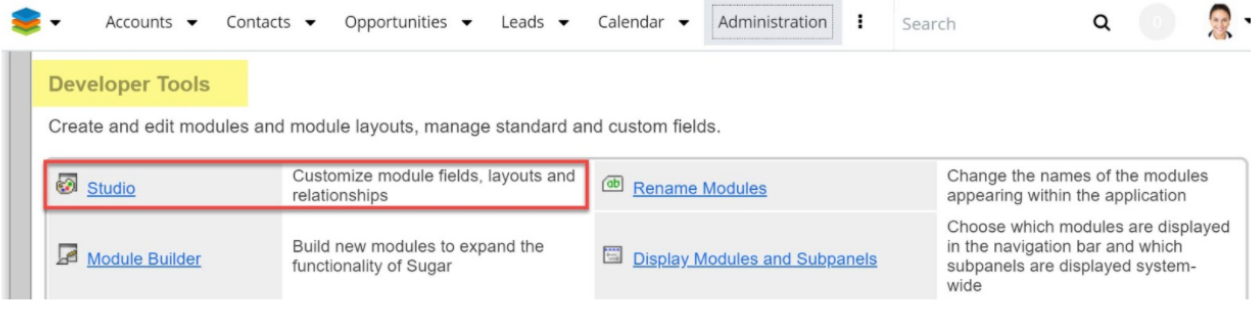
Administering the Attachments Fields Integration with wMobile for SugarCRM

Our wMobile for SugarCRM package supports integration with our Attachments Fields enhancement. This enhancement adds a new type of field which allows users to upload multiple files to a record. Please ensure that the installation, upgrading, and configuration steps are carried out on your Sugar Desktop Version.

Note: You must be a SugarCRM administrator to make the necessary changes to

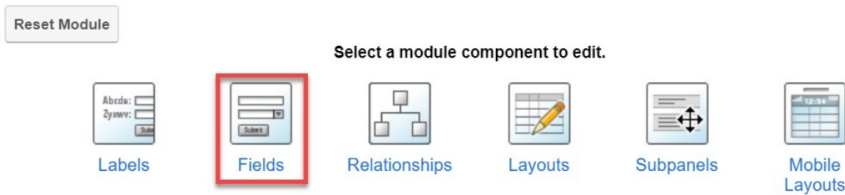
complete the configuration described in this section.

Configuring the AttachmentsField enhancement requires the user to go to the Studio section found on the Administration Page.

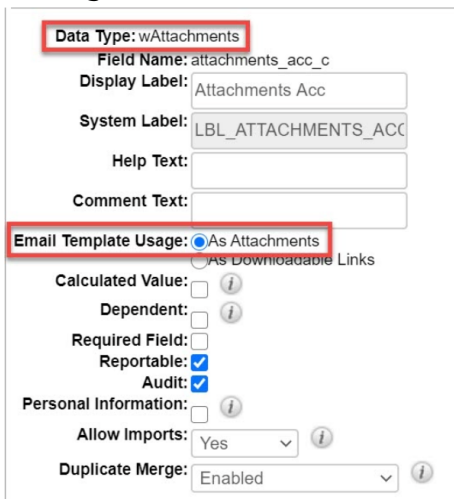


In Studio, go to your module of choice and configure a new **AttachmentsField** type from the **Fields** section.

Note: The enhancement cannot be configured on the following modules: Campaigns, Documents, Employees and Users.



Configure a custom field as in the image below:



Before using the AttachmentsField integration with wMobile for SugarCRM on your mobile, ensure that you make all modules visible for mobile, from your

desktop Sugar Instance.

Go to the **Administration** page. From the **System** section of the **Administration** page, open the **Mobile** page.

System

Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings within their user settings page.

System Settings	Configure system-wide settings	Import Wizard	Use the import wizard to easily import records into the system
Locale	Set default localization settings for your system	Upgrade Wizard	Upload and install Sugar upgrades
Currencies	Set up currencies and conversion rates	Languages	Manage which languages are available for users
Repair	Check and repair Sugar	Search	Select modules for the Global Search and configure full-text searching.
Diagnostic Tool	Capture system configuration for diagnostics and analysis	Connectors	Manage connector settings
Tracker	Enable/Disable tracking	Scheduler	Set up scheduled events
PDF Manager	Manage templates for generated PDF files	Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application
Web Logic Hooks	Manage Sugar Web Logic Hooks	OAuth Keys	OAuth key management

From the **Mobile** page, make all Modules available in the **Disabled Module** column visible for the mobile app.

Accounts ▾ Contacts ▾ Opportunities ▾ Leads ▾ Calend

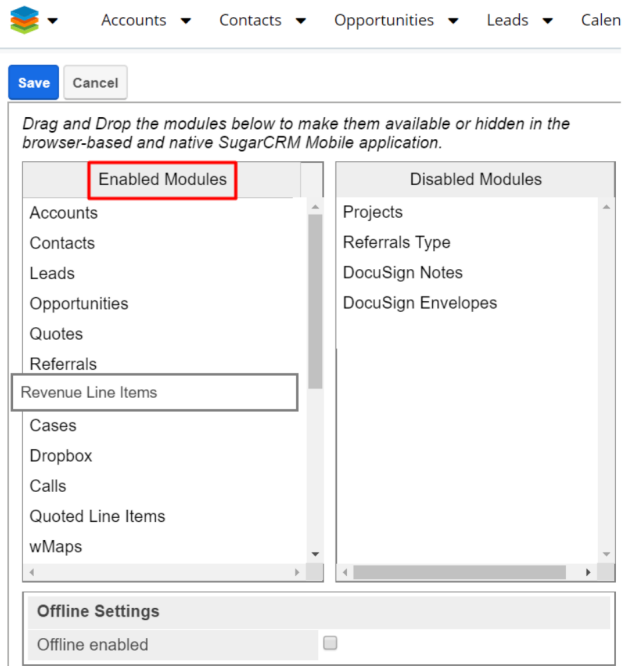
Save **Cancel**

Drag and Drop the modules below to make them available or hidden in the browser-based and native SugarCRM Mobile application.

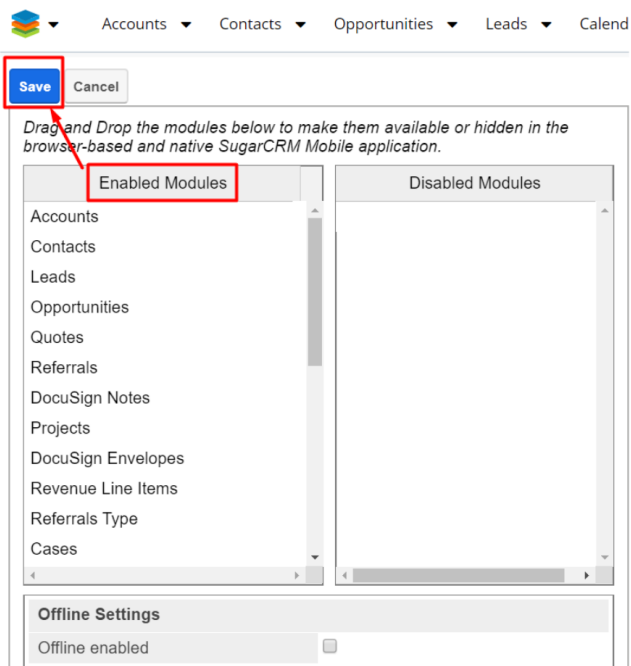
Enabled Modules	Disabled Modules
Accounts	Revenue Line Items
Contacts	Projects
Leads	Referrals Type
Opportunities	DocuSign Notes
Quotes	DocuSign Envelopes
Referrals	
Cases	
Dropbox	
Calls	
Quoted Line Items	
wMaps	
Tasks	

Offline Settings
Offline enabled

To manage this, drag and drop each module to the **Enabled Modules** panel.



Once you enable all the available modules from the **Disabled Modules** panel, **Save** your new configuration.



Note: The package configuration should be carried out on your desktop Sugar instance.

Using the AttachmentsField with Sugar Desktop Versions

Users can set up the attachments from the AttachmentsField to be saved as attachments or as Downloadable links. This user has the possibility to choose how an AttachmentsField should be used in an email template, either as email attachments or as downloadable links by using **Email Template Usage** options: **As Attachments, As Downloadable Links**.

Data Type: wAttachments
Field Name: attachments_acc_c
Display Label: Attachments Acc
System Label: LBL_ATTACHMENTS_ACC
Help Text:
Comment Text:
Email Template Usage: As Attachments
 As Downloadable Links
Calculated Value:
Dependent:
Required Field:
Reportable:
Audit:
Personal Information:
Allow Imports: Yes
Duplicate Merge: Enabled

After saving your configuration, you can go to a record on the configured module (Accounts, in our example) and attach files to the field.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents

Ac Income Free Investing LP ☆ Create Record Compose Email Edit

Website <http://www.kidhr.cn> Industry Technology

+ Member of Type Customer

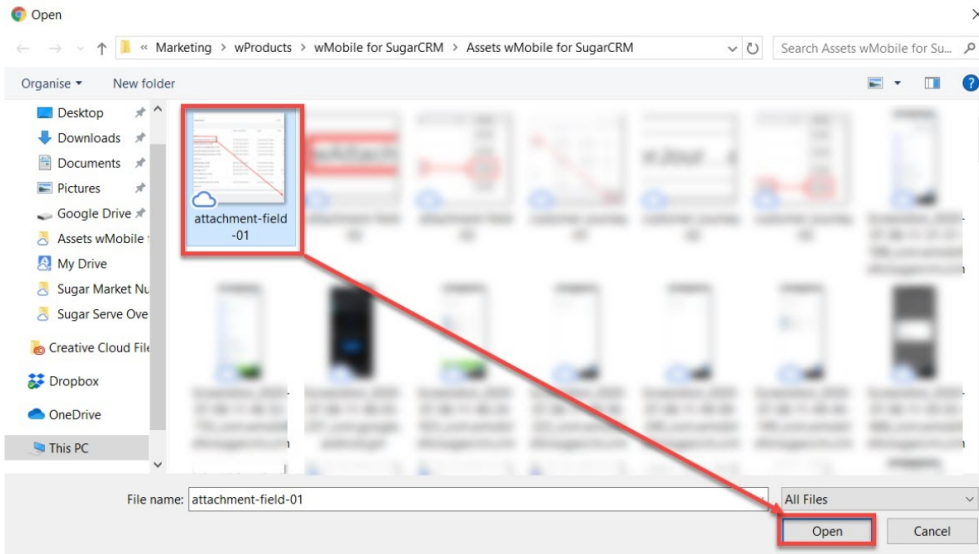
+ Business ... + Service L...

Assigned to Chris Olliver Office Phone (243) 265-4805

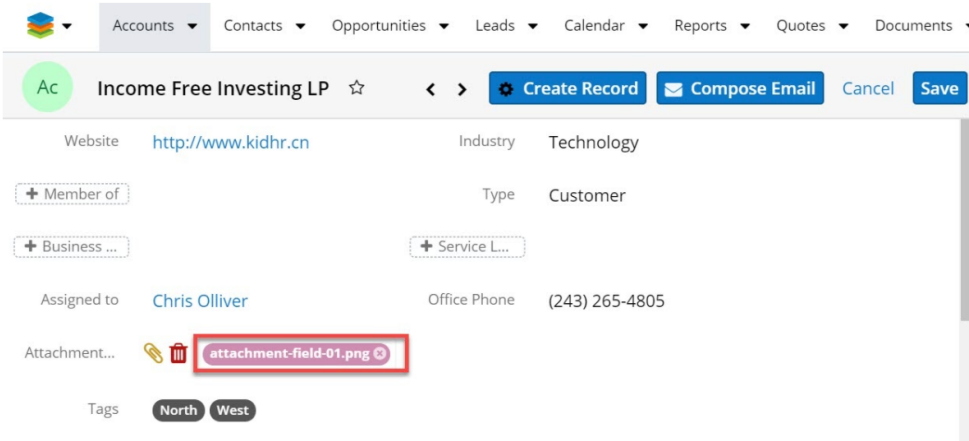
+ Attachme...

Tags North West

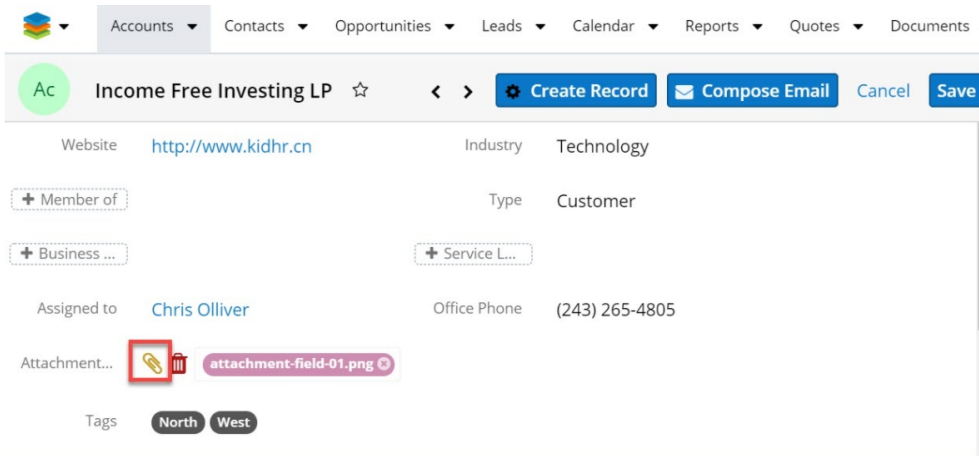
A new window from where you can choose a file from your local device will open. Select your file and click Open.



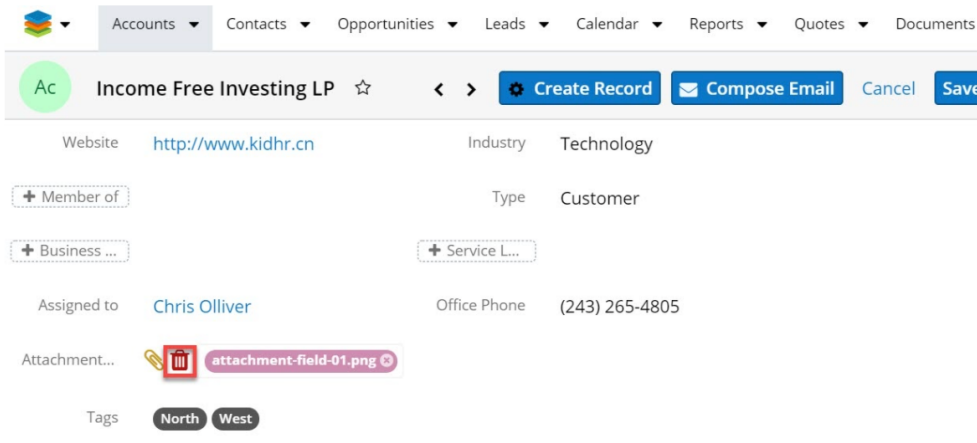
The selected file will be uploaded as an attachment for your Sugar record.



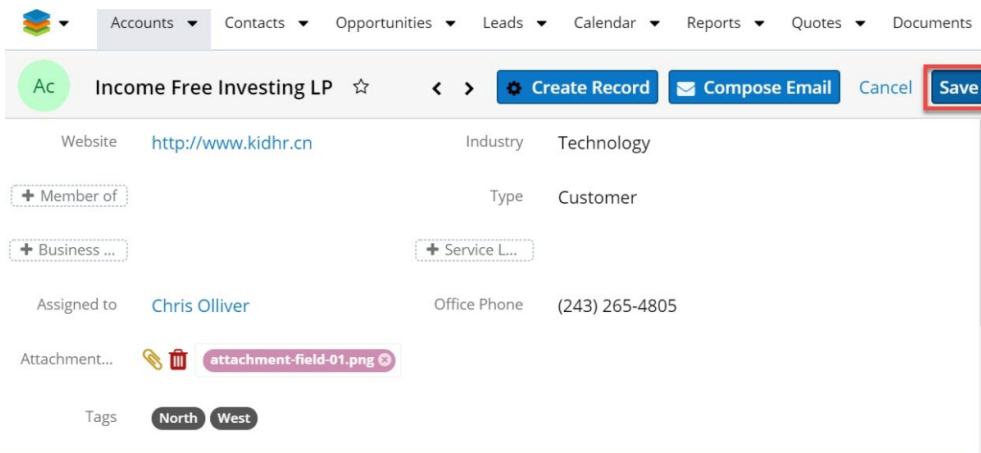
You can keep attaching files or documents by pressing on the paperclip icon next to the AttachmentsField.



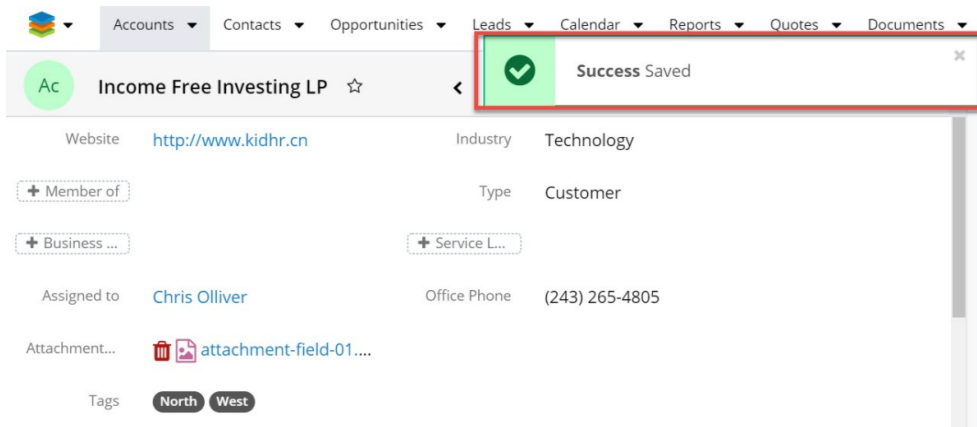
Or, you can delete the attached files by pressing on the bin icon next to the field.



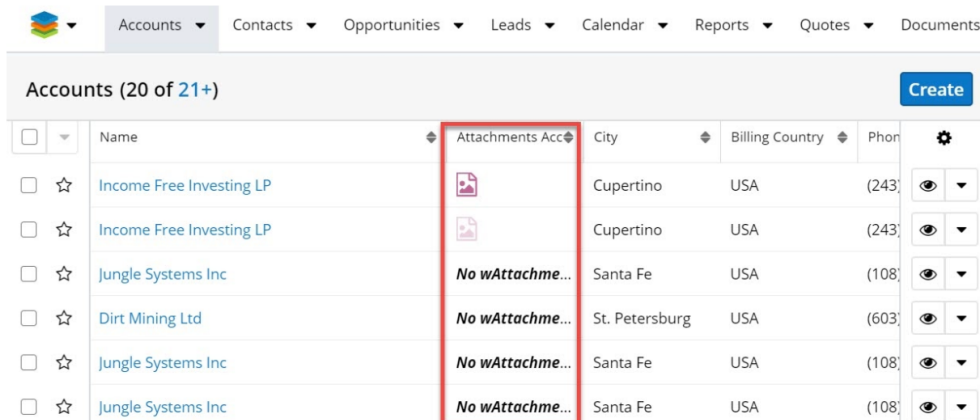
Once all the desired files are attached to the Field, ensure to save your edits.



If the attached files are successfully saved to the record, a pop up message will be displayed as in the image below:

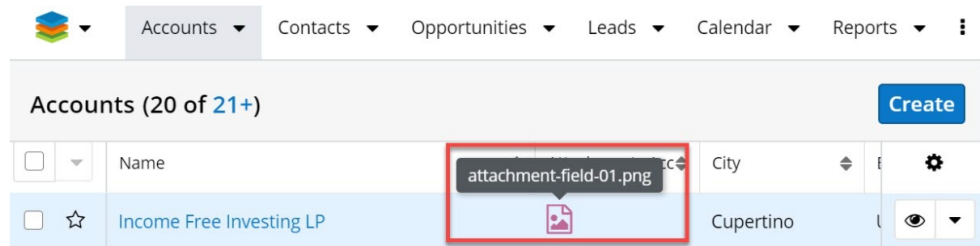


If the AttachmentsField is made visible from Studio for record view as well, the Attached files will also be visible for each record in List View, for the module configured.

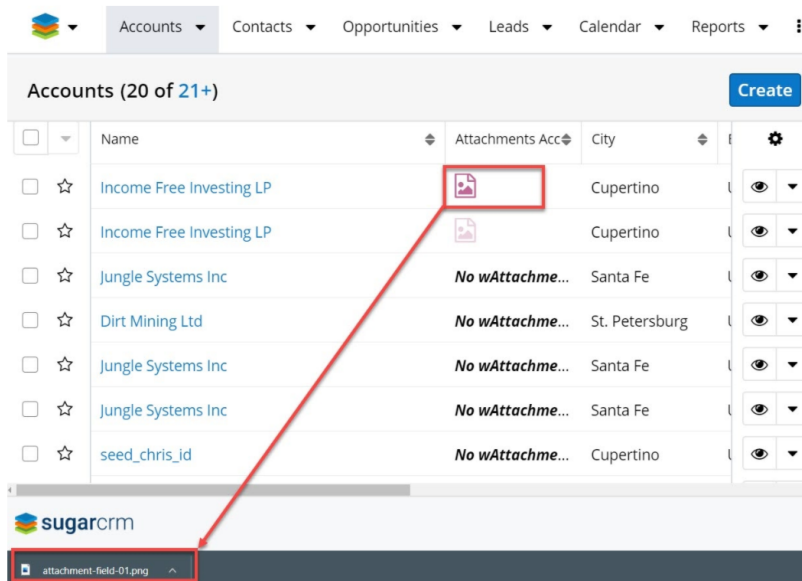


Downloading Attachments in List and Record View

Attachments can be downloaded from both list view and record view. To manage this, click on the desired attachments' icon from the view you find yourself in.



The file will be downloaded to your local device.



When **Email Template Usage** is set to **As Downloadable Links** the received email include a link with the attached files:

Hi,

The Account Test Attachments has the following files attached:

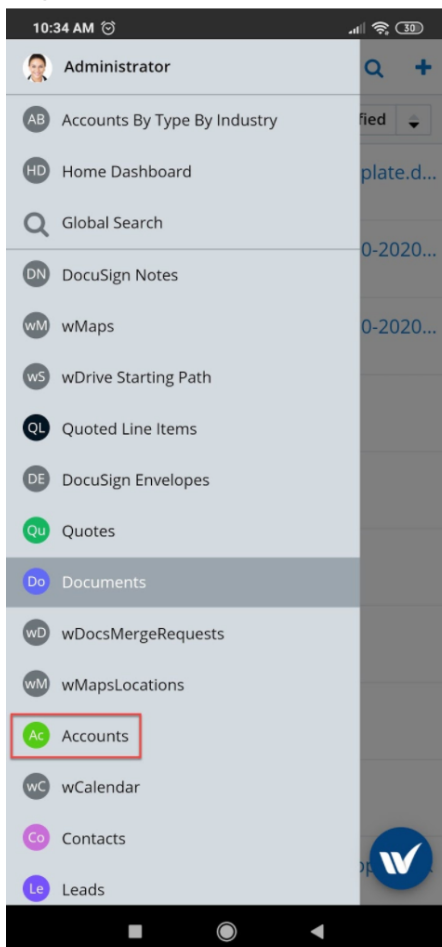
- [leaderboard DESC.png](#)
- [SugarcrmContacts20180723.csv](#)

Best regards,

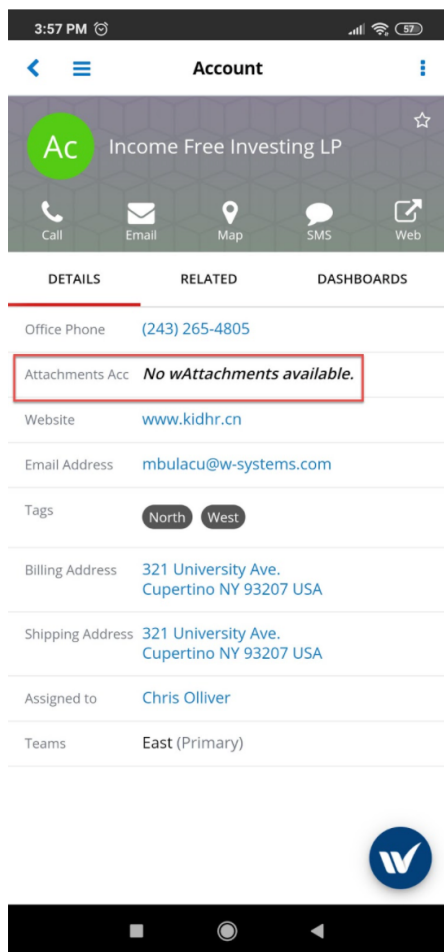
Using the AttachmentsField Integration with wMobile for SugarCRM

On the wMobile for SugarCRM, the **AttachmentsField** integration shares a similar functionality with the desktop version. Worth mentioning is the fact that users can attach files to the field **only if the record is opened in Edit Mode**.

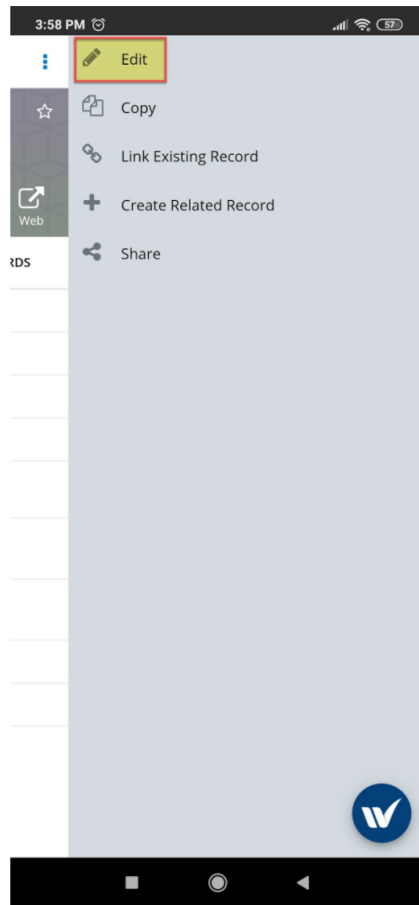
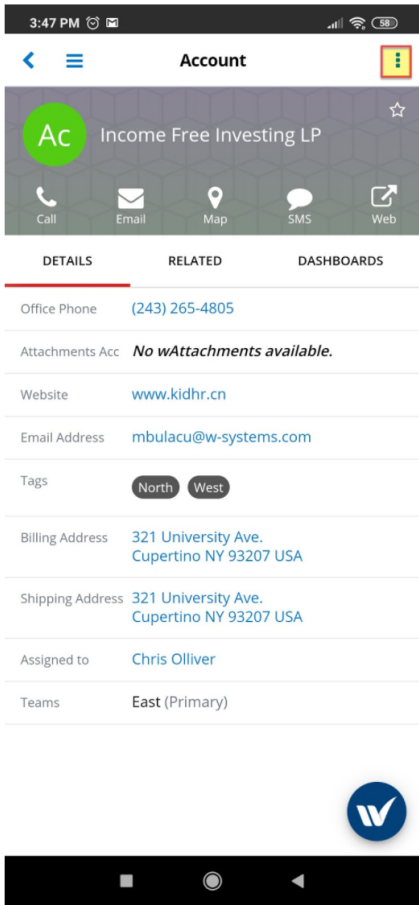
On your Mobile device, open the **wMobile for SugarCRM** app. Go to a module where you have previously configured the AttachmentsField integration on your Sugar desktop version (Accounts in our example).



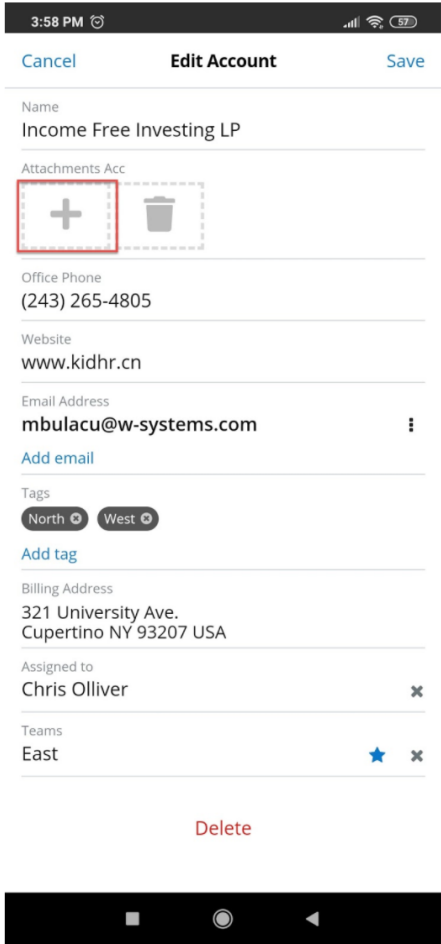
Open an Account record in View mode. The attachments field will display the No Attachments Available message on the field.



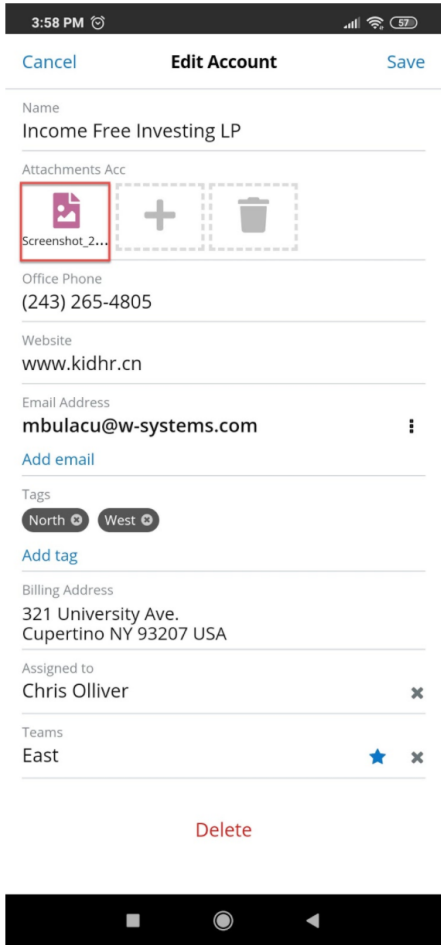
Tap on the right menu (the three dots) and choose Edit.



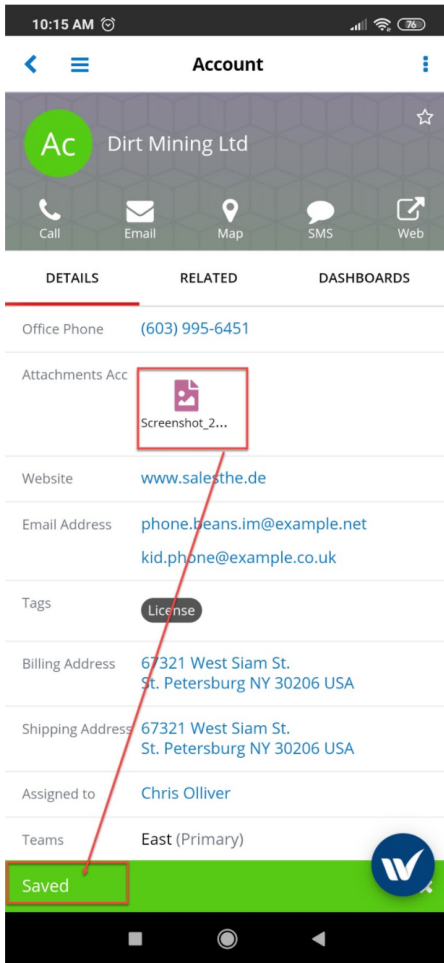
Tap on the + button beneath the AttachmentsFields field.



Choose a file from your local device to attach to the field.



Save your changes. A popup message will be displayed.



You can also delete and keep adding attachments to the record by pressing the corresponding icons next to the field, just as adding or deleting files on the desktop version of the enhancement.

The Custom Buttons Integration with wMobile for SugarCRM

- [Administering the Custom Buttons Integration with wMobile for SugarCRM](#)
- [Using the Custom Buttons Integration with wMobile for SugarCRM](#)

Administering the Custom Buttons Integration with wMobile for SugarCRM

To ensure proper use and deployment of this integration, make sure that you follow the configuration steps in the Custom Buttons section of the [wTools User Guide](#). Ensure that you first create and configure all the desired Custom Buttons

from the **Desktop Sugar Instance before using the package with wMobile for SugarCRM**. Before using the Custom Buttons integration with wMobile for SugarCRM on your mobile, ensure that you make all modules visible for mobile, from your desktop Sugar Instance.

Note: You must be a SugarCRM administrator to make the necessary changes to complete the configuration described in this section.

Go to the **Administration** page. From the **System** section of the **Administration** page, open the **Mobile** page.

System

Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings within their user settings page.

System Settings	Configure system-wide settings	Import Wizard	Use the import wizard to easily import records into the system
Locale	Set default localization settings for your system	Upgrade Wizard	Upload and install Sugar upgrades
Currencies	Set up currencies and conversion rates	Languages	Manage which languages are available for users
Repair	Check and repair Sugar	Search	Select modules for the Global Search and configure full-text searching.
Diagnostic Tool	Capture system configuration for diagnostics and analysis	Connectors	Manage connector settings
Tracker	Enable/Disable tracking	Scheduler	Set up scheduled events
PDF Manager	Manage templates for generated PDF files	Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application
Web Logic Hooks	Manage Sugar Web Logic Hooks	OAuth Keys	OAuth key management

From the **Mobile** page, make all Modules available in the **Disabled Module** column visible for the mobile app.

Accounts Contacts Opportunities Leads Calend

Save Cancel

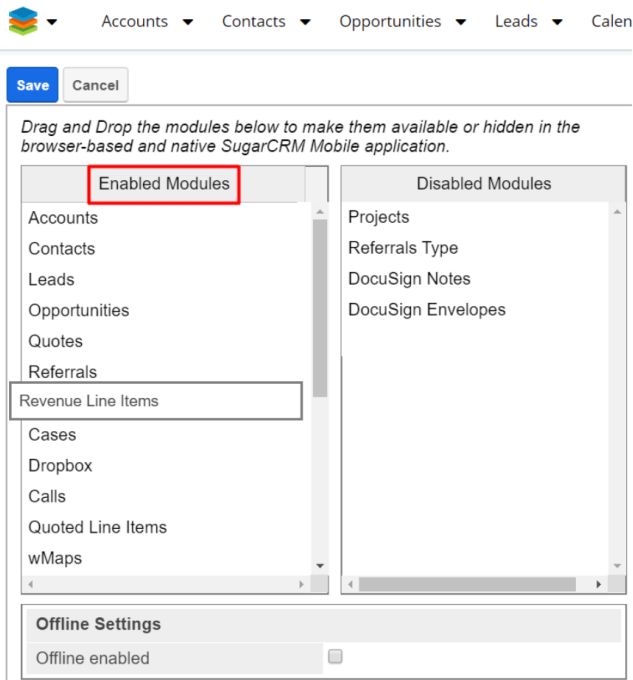
Drag and Drop the modules below to make them available or hidden in the browser-based and native SugarCRM Mobile application.

Enabled Modules	Disabled Modules
Accounts	Revenue Line Items
Contacts	Projects
Leads	Referrals Type
Opportunities	DocuSign Notes
Quotes	DocuSign Envelopes
Referrals	
Cases	
Dropbox	
Calls	
Quoted Line Items	
wMaps	
Tasks	

Offline Settings

Offline enabled

To manage this, drag and drop each module to the **Enabled Modules** panel.



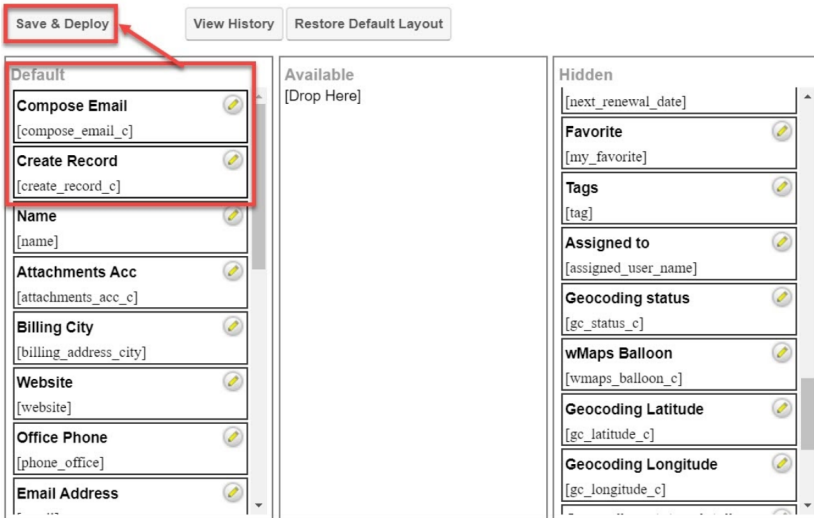
Once you enable all the available modules from the **Disabled Modules** panel, **Save** your new configuration.

Using the Custom Buttons Integration with wMobile for SugarCRM

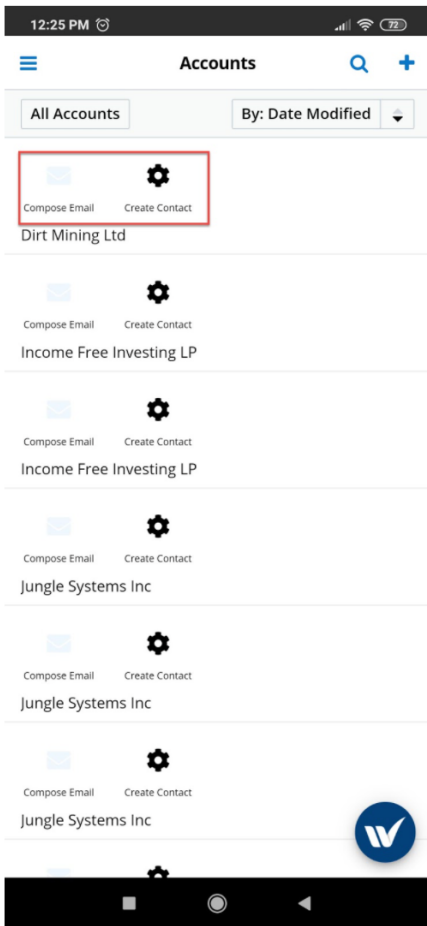
The Custom Buttons Integration supports different actions for each button created in Studio. To familiarize yourself with all the available actions for this integration, please refer to the wTools User Guide, the Custom Buttons Actions Section.

Custom Buttons in List View

You may also want to make your Custom Buttons available on **Mobile ListView**. Access the page and drag and drop **Hidden** elements to the **Default** panel on the left side of the configuration screen.



Save and Deploy your configuration.

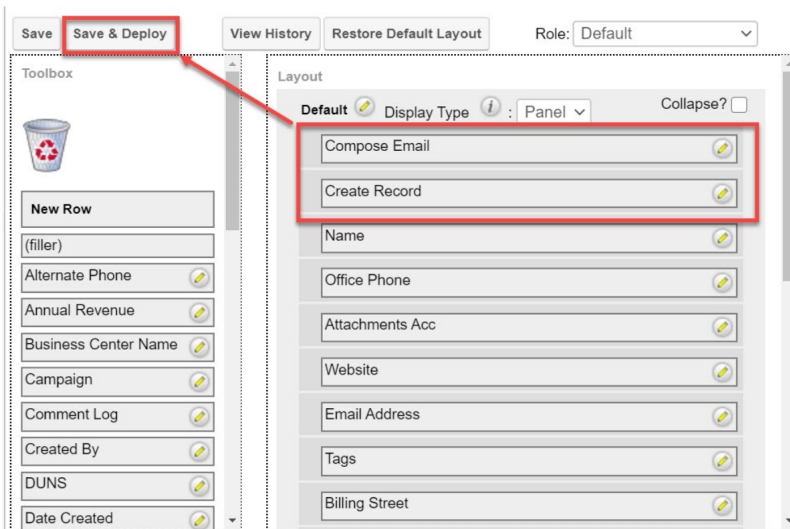


Custom Buttons in Detail View

Make the Custom Buttons available for mobile view from **Studio > your module of choice > Mobile Layouts > Mobile DetailView**.

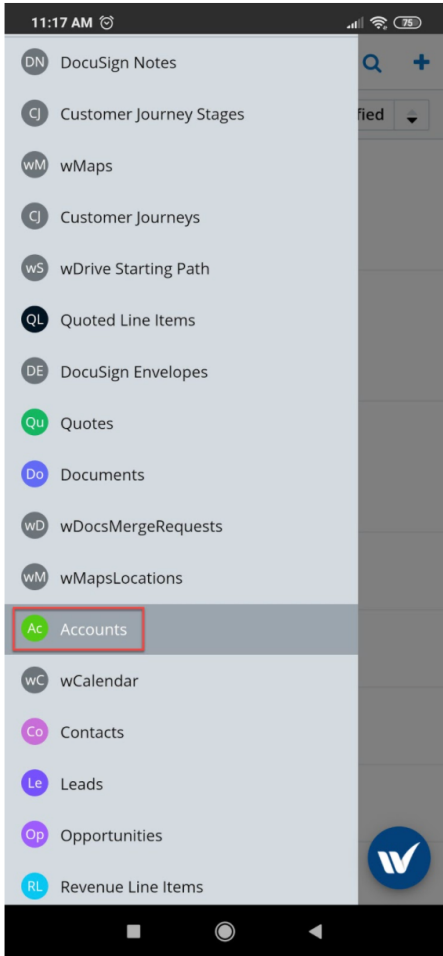


Drag and drop your Custom Buttons to the Mobile Detail View layout and **save and deploy** your configuration.

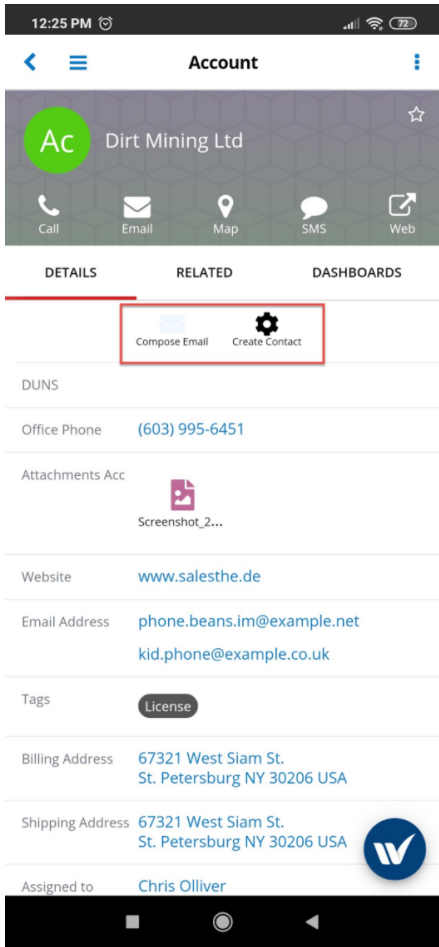


The buttons can now be used on your mobile device.

Once you configure your buttons on your **desktop Sugar Instance**, open the wMobile for SugarCRM app on your mobile device. Go to a module where you have the Custom Buttons package configured and made available in Mobile Detail View - Accounts in our case:



Open in Record View an account. The Custom Buttons will be displayed in the position you have previously configured in Studio.



Last Modified: 2021-11-23 16:45:38