

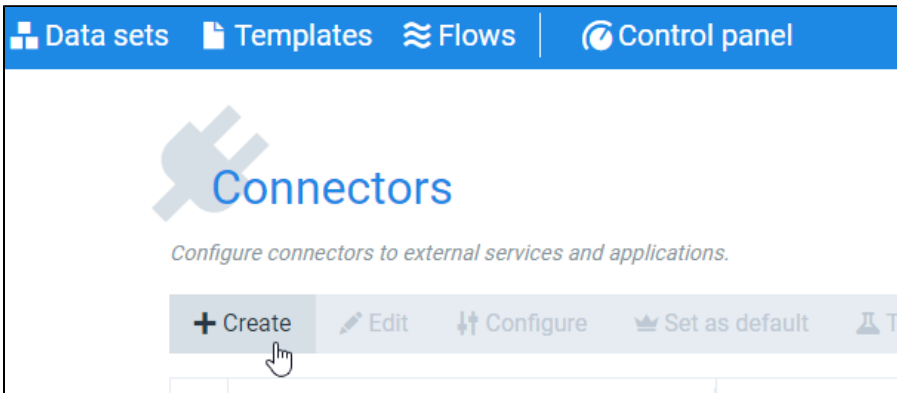
Xpertdoc App for Sugar

This app for Sugar provides a turn-key integration of Xpertdoc Smart Flows with SugarCRM's leading Customer Engagement platform. It enables Sugar users to interact with Xpertdoc's document flow automation capabilities from within their familiar Sugar user experience.

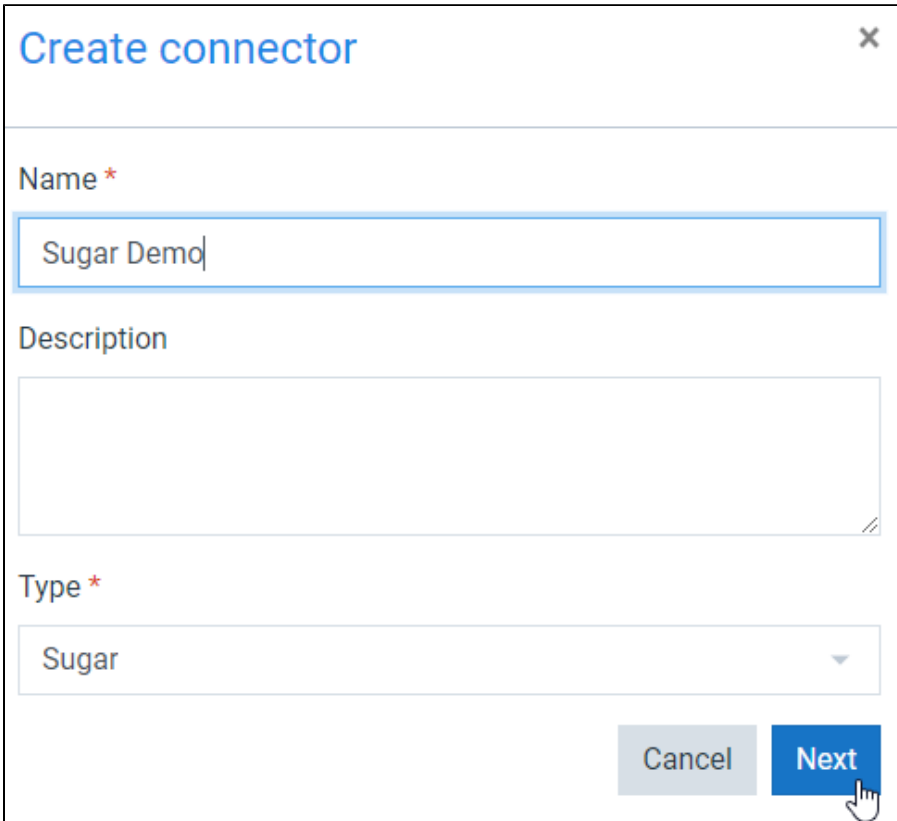
For more information about Sugar, visit <https://www.sugarcrm.com/>.

Step 1: Create Sugar Connector

In the Xpertdoc Smart Flows Project Console, go to [Control Panel > Connectors](#). Create a new connector.



Give the connector a name and choose [Sugar](#) as the connector type.

A screenshot of the 'Create connector' dialog box. The title bar says 'Create connector' with a close button. The form has three main sections: 'Name *' with a text input field containing 'Sugar Demo'; 'Description' with a large empty text area; and 'Type *' with a dropdown menu showing 'Sugar'. At the bottom right, there are two buttons: 'Cancel' and 'Next' (highlighted with a mouse cursor).

Insert the URL of the Sugar instance to which you want to connect your Xpertdoc Smart Flows project.

Create connector

Server

Set the url to your Sugar CRM instance

Sugar url *

Cancel Next

i Configuration during Project Initialisation

The Sugar connector can also be configured during the initialisation of your project. If you are licensed for Xpertdoc for Sugar, the initialisation wizard will prompt you for the URL of a Sugar instance. From that point onwards, follow the steps below.

Create connector

Server

Set the url to your Sugar instance

Sugar url *

Cancel Next

Login with admin credentials for the selected Sugar instance. Make sure to tick the box to install/update the Sugar Package. This will create an Xpertdoc Smart Flows app package for Sugar that you can upload in your Sugar instance via Module Loader.

Create connector

Authenticate with Sugar

Enter your credentials to authenticate with Sugar

User name

Password

I want to install/update the Sugar Package

[Cancel](#) [Next](#)

Step 2: Create, Upload and Install the Xpertdoc App Package for Sugar

In the next step, the wizard creates an app package that you can upload in Sugar. Download the package ZIP archive (1) and then click the link to Module Loader (2).

Create connector

Install your Smart Flows Sugar package

Download & install the Sugar package

[Download](#) 1

Link to Sugar module loader

[Module loader](#) 2

[Cancel](#) [Next](#)

In Module Loader, upload the package ZIP archive (1-2) and install it (3). It will be added to the list of installed extensions (4).

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails Campaigns Calls

Module Loader

The following extensions are installed on this system:

Name	Action	Enable/Disable	Type	Version
Hint demo data	Uninstall	Disable	module	1.0.0.17
Goto Data dashlet			module	1.0.0.2
SugarExchange	Uninstall	Disable	module	2.1.0
Marketing Campaign demo data	Uninstall	Disable	module	1.0.0.12
SMTP server configuration		Disable	module	0.2
Ops-Modules	Uninstall	Disable	module	2.0.9

Module

Name	Install	Delete	Type	Version
Xpertdoc Smart Flows	<input type="button" value="Install"/>	<input type="button" value="Delete Package"/>	Module	4.2.0.9

During the installation you are prompted to Accept the license. Commit to proceed with the installation.

Accounts Contacts Opportunities Leads

Ready To Install

Please read the following License Agreement:

You installation or use of this Xpertdoc file is subject to the applicable terms at <https://www.xpertdoc.com/en/legal/>.
 If you do not agree to all of the applicable terms or do not have the authority to bind the entity as an authorized representative, then do not install or use this Xpertdoc file.

Copyright (C) Xpertdoc Technologies, Inc. All rights reserved.

Accept Deny

Step 3: Set up the Configuration Record

After installing the Xpertdoc Smart Flows App Package in Sugar, return to the wizard in the Xpertdoc Smart Flows Project Console and click next.

Create a configuration record. This is the actual handshake between your Sugar instance and your Xpertdoc Smart Flows project. It will be saved in a custom table in that the app package has added to your Sugar instance. Tick both options in this box:

- create the configuration record

- create an API key

Create connector

Create/configure Sugar connection record automatically

Configure Smart Flows in your Sugar instance

- Create Xpertdoc Smart Flows Configuration Record automatically
- Create API key (recommended)

Cancel Next

Step 4: Grant User Roles and Sync Users

In Sugar, The Xpertdoc App adds three roles for users:

- Xpertdoc Smart Flows Administrator
- Xpertdoc Smart Flows Designer
- Xpertdoc Smart Flows User

Grant these roles to the appropriate users in Sugar. To do so, open a role, scroll down to the Users subpanel and select the users to whom you want to grant the role. For more information about the differences between the roles, check the [Users](#) section.

The screenshot shows the Sugar CRM interface with a navigation bar at the top containing menu items: Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, and Documents. Below the navigation bar is the 'Roles' section. It features a search bar with a 'Name' input field, 'Search', and 'Clear' buttons. A 'Delete' button is also present. The main content is a table with two columns: 'Name' and 'Description'. The table lists three roles, each with a checkbox and a lock icon.

Name	Description
<input type="checkbox"/> <input type="lock"/> Xpertdoc Smart Flows User	Xpertdoc Smart Flows User
<input type="checkbox"/> <input type="lock"/> Xpertdoc Smart Flows Designer	Xpertdoc Smart Flows Designer
<input type="checkbox"/> <input type="lock"/> Xpertdoc Smart Flows Administrator	Xpertdoc Smart Flows Administrator

Tracker Sessions	Processes	Not Set	Not Set	Not Set
Trackers	Product Categories	Not Set	Not Set	Not Set
Web Logic Hooks	Project Tasks	Not Set	Not Set	Not Set
	Projects	Not Set	Not Set	Not Set
	Quoted Line Items	Not Set	Not Set	Not Set

SugarCRM - Commercial Open Source CRM - Google Chrome

https://sg-xssfd.demo.sugarcrm.eu/index.php

Country

Users

<input type="checkbox"/>	Name	User Name	Title	Department	Email	Phone	Status	System Administrator
<input checked="" type="checkbox"/>	Will Westin	will	Sales Manager East		will@example.com		Active	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Sarah Smith	sarah	Sales Manager West		sarah@example.com		Active	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Sally Bronsen	sally	Senior Account Rep		sally@example.com		Active	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Max Jensen	max	Account Rep		max@example.com		Active	<input type="checkbox"/>
<input type="checkbox"/>	Jim Brennan	jim	VP Sales		jjim@example.com		Active	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Chris Olliver	chris	Senior Account Rep		chris@example.com		Active	<input type="checkbox"/>
<input type="checkbox"/>	Jen Smith	admin	Administrator		jen@example.com		Active	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Regina Lazlow	regina	Senior Support Rep		regina@example.com		Active	<input type="checkbox"/>

Users

Name

No data

SUGARCRM

Back in the project Console, go to the Control Panel > Users to sync the connected users from Sugar.

Control panel

Connectors
Connectors are links between Xpertdoc Smart Flows and an external service or application.

Tags
Use tags to organize your flows, data sets and templates. Tagged flows will be presented to the end user in a subfolder structure.

Users
Manage, create, sync, edit and deactivate users.

Language
Multiple lang allows for au

Assets
Assets are p

Printers
In Xpertdoc thus add the

Users

Manage native users and roles in the console, or manage roles and sync users through a connected system.

Connected Native System

<input checked="" type="checkbox"/>	NAME	USER NAME	E-MAIL	ROLE	ACTIVE
Items per page 10					
0 - 0 of 0					

Users

Manage native users and roles in the console, or manage roles and sync users through a connected system.

Connected Native System

Sync Configure sync Edit Filter

NAME	USER NAME	E-MAIL	ROLE	ACTIVE
Jim Brennan	jim	jim@example.com	Administrator	✓
Sally Bronsen	sally	sally@example.com	Administrator	✓
Jane Fitzpatrick	jane	jane@example.com	Administrator	✓
Charles James	charles	charles@example.com	Administrator	✓
Max Jensen	max	max@example.com	Administrator	✓
Regina Lazlow	regina	regina@example.com	Administrator	✓
Chris Olliver	chris	chris@example.com	Administrator	✓
Sarah Smith	sarah	sarah@example.com	Administrator	✓
Will Westin	will	will@example.com	Administrator	✓

Items per page 10
1 - 9 of 9



User named admin

The user named "admin" will not sync in version 4.2.0 of Xpertdoc for Sugar. This user cannot be used to execute flows. This restriction will be lifted in a later iteration.

Related Content

- [Error - invalid_grant: Refresh token has expired \(Sugar\)](#)