



Sugar Setup Guide

This document outlines the required initial setup steps in the external system for the Verify integration.

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SETUP GUIDE OVERVIEW

This setup guide will require the system administrator to complete steps outlined below in order to connect the external system application with Verify.

Please note, this document may be subject to change and additional information required. Partnership with system administrator and/or support team may be necessary.

OPTIONAL STEP: SUGAR VERIFY USER ACCESS

Please create an Admin user for the integration and provide the following credentials to your Verify Implementation Specialist if you'd like them to have access to your CRM's UI. It is preferred that users are created with an Administrator role to ensure that no permissions errors are encountered during the implementation.

Follow this format when creating the log in: passwords+clientname@verify.com

Example: passwords+verify@verify.com

If license/seat is unavailable, it can also be created through a personal account. Please note, it will need to be updated if the user or password is inactivated.

STEP 1: CUSTOM FIELD CREATION

Custom fields are required in the endpoint system for the Verify integration. Please create these fields on any tables or objects such as Leads, Contacts, or Accounts. Reference the API Name column in the table below for the list of how to title the fields, the needed data type, and the purpose of the field for context.

API Name	Data Type	Purpose
ExternalContactId	String	This field will be used to house the source Contact's internalId, and for merging and lookup purposes in Verify.
ExternalCompanyId	String	This field will be used to house the source Company's internalId, and for merging and lookup purposes in Verify.
SyncToVerify	Boolean	This field will be hard-coded by Verify or by a workflow. It is used to determine which records are eligible to move back to the other endpoint(s) and for filtering in Verify.

STEP 2: SUGAR VERIFY API USER SETUP

Action Item: Please create an Admin user in Sugar for the integration, and save the Username and Password in a text document.

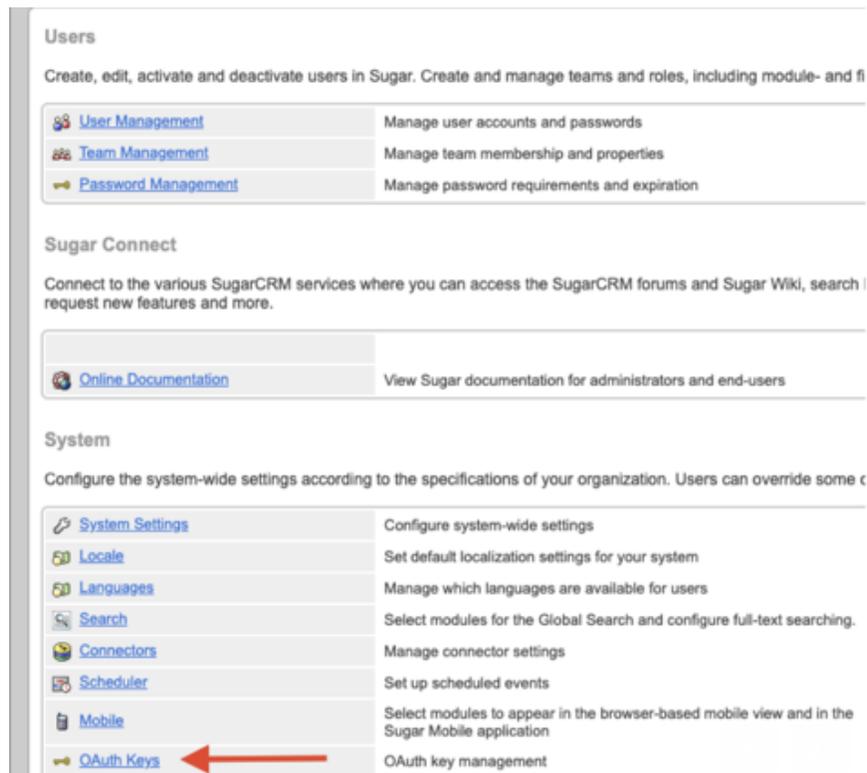
STEP 3: OAUTH KEY SETUP

First, an OAuth 2 Key will need to be set up for the Verify connection to Sugar.

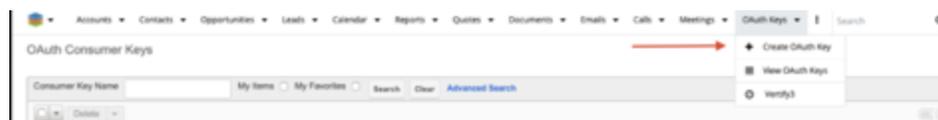
Note: the screenshots below are from Sugar version 9 and may differ slightly depending on versioning.

Please follow these steps for setting up the OAuth 2 Key:

1. Log into Sugar and access the Admin settings.
2. Under the System section, click on "OAuth Keys".



3. Once on the OAuth Keys page, click "Create OAuth Key" from the OAuth Keys menu.



4. Once on the Create page, enter the required fields:

- a. Consumer Key Name - enter "Verify Integration"
- b. Consumer Key - enter "Verify[CLIENTNAME]Key"
 - i. Example: VerifyNikeKey
- c. Consumer Secret - enter "Verify[CLIENTNAME]Secret"
 - i. Example: VerifyNikeSecret
- d. OAuth Version - should be OAuth 2.0
- e. Client Type - choose "Sugar User"

Action Item: Please log the Consumer Key and Consumer Secret in the text document and save.

STEP 4: COPY API ENDPOINT

The final credential we need to connect Verify with SugarCRM is your API Endpoint. This is your SugarCRM URL. When you're logged into Sugar, simply copy the URL from your address bar to use in Verify.

Action Item: Please log the API endpoint in the text document and save.

STEP 5: VERIFY SYSTEM SETUP

Refer to the steps outlined below to set up the system in Verify. Alternatively, you're welcome to schedule a working session to partner with your Verify Integration Specialist on the steps below.

New System

Systems | Movements | Schedule | History | Find a Record

Remote System: SugarCRM (A)

System Name: SugarCRM | System Prefix: SUG

Share system across workspaces

Connector: 1.1.6 (B)

System Type: BiDirectional

Max Concurrent Tasks: 1

Remote System Login Parameters (C)

API Endpoint:

Client ID:

Platform:

Client Secret:

Username:

Password:

Confirm Password:

Cancel | Save (D)

1. In Verify, navigate to the Connect page

2. Click the New System button
3. Next, enter the required system credentials -
 - a. Select SugarCRM from the Remote System List
 - b. Select the highest Connector number (i.e., 1.3.5)
 - c. You will enter the Login Parameters when available from steps outlined above:
 - i. API Endpoint [Required]
 - ii. Client ID [Required]
 - iii. Platform [Required]: base
 - iv. Client Secret [Required]
 - v. Username [Required]
 - vi. Password [Required]
 - d. In Verify, click the blue Save button
 - e. This will initiate the scan and authentication step of connecting with the provided credentials
 - f. Look for a green Scan Complete message; if failed or error, connect with the system administrator and let your Verify One Team know the status.