

Sugar Setup Guide

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

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 VERTIFY USER ACCESS

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

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

Example: passwords+vertify@vertify.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 Vertify 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 Vertify.
ExternalCompanyId	String	This field will be used to house the source Company's internalld, and for merging and lookup purposes in Vertify.
SyncToVertify	Boolean	This field will be hard-coded by Vertify 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 Vertify.

STEP 2: SUGAR VERTIFY 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 Vertify 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".

Users	
Create, edit, activate and deactivate	users in Sugar. Create and manage teams and roles, including module- and fi
88 User Management	Manage user accounts and passwords
ata Team Management	Manage team membership and properties
Password Management	Manage password requirements and expiration
Connect to the various SugarCRM se request new features and more.	arvices where you can access the SugarCRM forums and Sugar Wiki, search i
Online Documentation	View Sugar documentation for administrators and end-users
System	
Configure the system-wide settings a	according to the specifications of your organization. Users can override some of
Ø System Settings	Configure system-wide settings
50 Locale	Set default localization settings for your system
50 Languages	Manage which languages are available for users
Search	Select modules for the Global Search and configure full-text searching.
Connectors	Manage connector settings
Scheduler	Set up scheduled events
Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application
- OAuth Keys	 OAuth key management

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

👼 • Accounts • Contacts • Opportunit	ies • Leads • Calendar • Reports • Quotes • Documents •	Smalls + Calls + Meetings + Ohuth Keys + 1 Search Q
OAuth Consumer Keys		Create Offuth Key
		Wew DAuth Keys
Consumer Key Name	ly tens O My Favories O Search Clear Advanced Search	O Verity3
C . Delete +		

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

- a. Consumer Key Name enter "Vertify Integration"
- b. Consumer Key enter "Vertify[CLIENTNAME]Key"
 - i. Example: VertifyNikeKey
- c. Consumer Secret enter "Vertify[CLIENTNAME]Secret"
 - *i.* Example: VertifyNikeSecret
- 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 Vertify 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 Vertify.

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

STEP 5: VERTIFY SYSTEM SETUP

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

New System	
ystems Movements Schedule History Find a Record	
Remote System SugarCRM System Name System Name SugarCRM S	Connector 1.1.6 System Type BiDirectional Max Concurrent Tasks 1
Rem	note System Login Parameters
API Endpoint	Usemame
Client ID	Password
Platform	Confirm Password
Client Secret	
	Cancel Save D

1. In Vertify, 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 Vertify, 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 Vertify One Team know the status.