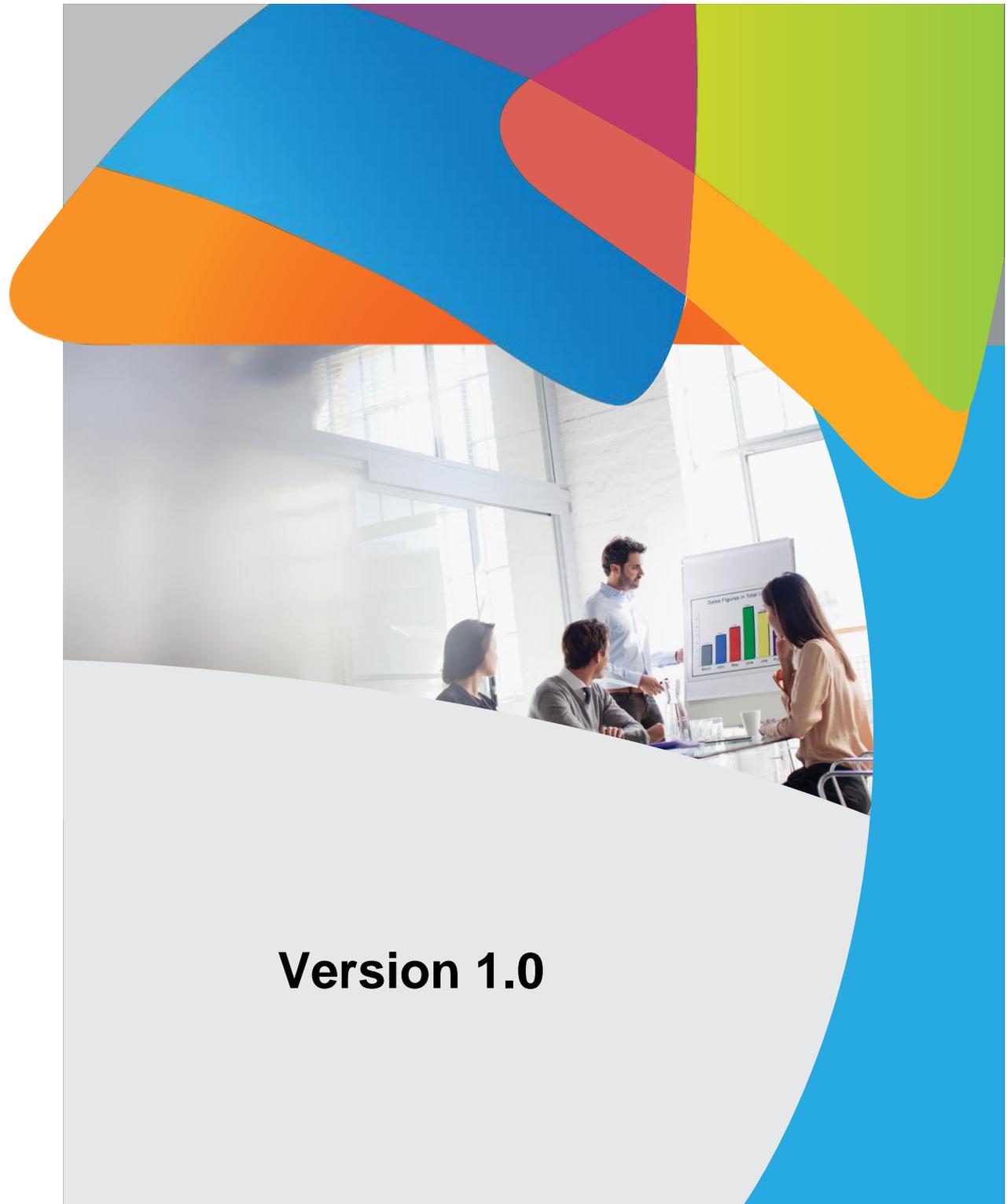




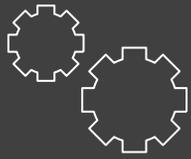
Doc Parser



Version 1.0



URDHVA TECH



KEY FEATURES

- ✓ Download the parsed document locally
- ✓ Link the parsed document to the Documents module
- ✓ Works with custom modules
- ✓ Sample templates provided
- ✓ Design templates yourself easily

Introduction

For any business organization, generating documents is essential requirement. Generated documents are in the form of contracts, proposals, notices or any information.

Through DocParser, a user can create WordDoc or PDF which can show relationship information from a built-in or custom module.

It allows a user to create an informative (Attractive) template to parse information, which can be used for multiple times.

(1) Easily generate WordDoc/PDF from any module your users need.

(2) DocParser allows to either download document or relate it within SugarCRM's Documents module.

(3) Generated WordDoc/PDF can also include the records from relational module. For example, we have template for Contact module with information about related Meetings, Tasks or Cases. Now, when you want to have all the information in single Word/PDF. You just need to download document from DetailView of that particular Contact's profile.

(4) The document can be generated from DetailView and ListView.

(A) User's will have a button on DetailView from where he will have the option to choose Word Doc, PDF or relate it with SugarCRM's Documents module.

(B) If a user wants to have download multiple documents in one shot. He can download it via List View button. Each record will be parsed individually and it generates Zip file to download. Similarly, If you want to relate document in one shot. It can be achieved from List view itself.

How to get the plugin?

- For SugarCRM, Buy it from the link below.

[DocParser - Sugaroutfitters](#)

How to install?

- Navigate to Admin > Module Loader and select the zip file, that you would have received upon the purchase. Follow the installation process.

Validate the license

- Once add-on is installed successfully, you have to provide valid license. Go to **Admin** and access “DocParser License Configuration” link shown as below.

DocParser License Configuration

DocParser is a tool that can be used to merge information from any module into a presentation-quality document and create an MS Word and PDF documents.

[DocParser License](#)

Manage and configure the license for DocParser

- Provide the license key that you have received upon purchase and validate it.

DocParser License Configuration: DocParser License

To Locate Your Key

1. Login to [SugarOutfitters](#)
2. Go to Account->Purchases
3. Locate the key for the purchase of this add-on
4. Paste into the License Key box below
5. Hit "Validate"

License Key

Validate

✓ Success!

Continue

Create Doc Parser Template

- Select the module for which you want to generate the template. The list of modules supports the built-in and custom modules, if any.

Module selection for which user want to create template.

Select field(s) for display into template.

Prepare the template with related information of the base module. Choose the relationships data of the Base module that will be parsed when generating the PDF/Word file.

Name: *
Sample Meeting with attendees

Base Module: *
Meetings

Field Selection:
Subject

Choose relational data:
Choose relationship data

Template Body:

Agenda:
\$meetings_|name
Account:
\$meetings_|parent_name
Status:
\$meetings_|status
Start Date:
\$meetings_|date_start

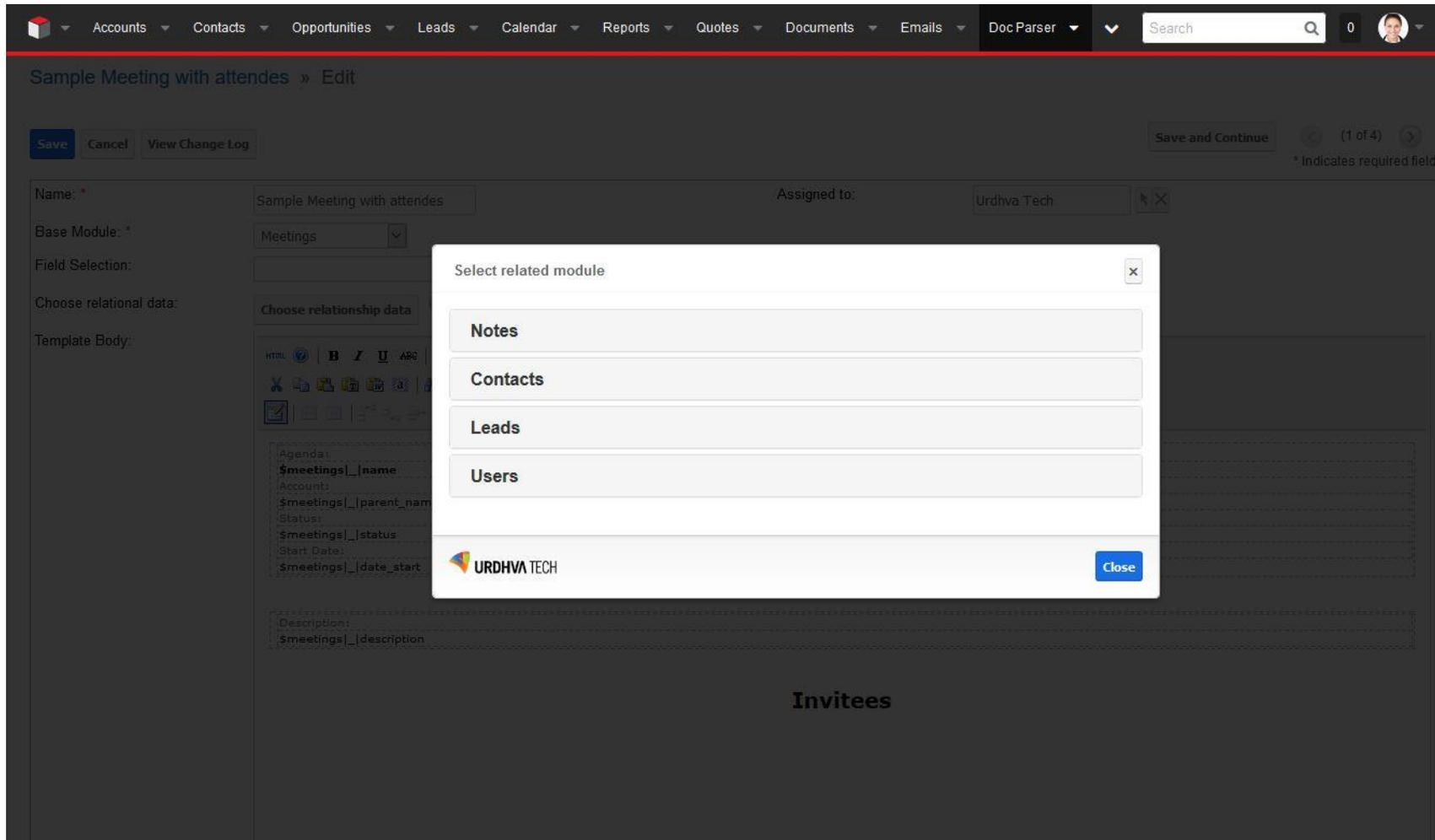
Assigned to:
\$meetings_|assigned_user_name
Created on:
\$meetings_|date_entered
Last updated on:
\$meetings_|date_modified

Description:
\$meetings_|description

Invitees

- ❖ Base Module: Module selection for which user wants to create Doc Parser template.
- ❖ Field Selection: Select field(s) for display into template. After field selection, user has to click "Insert Field" button to include field into template body.
- ❖ Choose Relationship Data Button: Select subpanel(s) for display into template.

- When user clicked on "Choose Relationship Data" button then popup will open as follows. Popup contains all the subpanel(s) which is display under Base Module. We have selected "Meetings" module as base module that's why popup allows option to include records from Contacts, Users, Leads and Notes module.



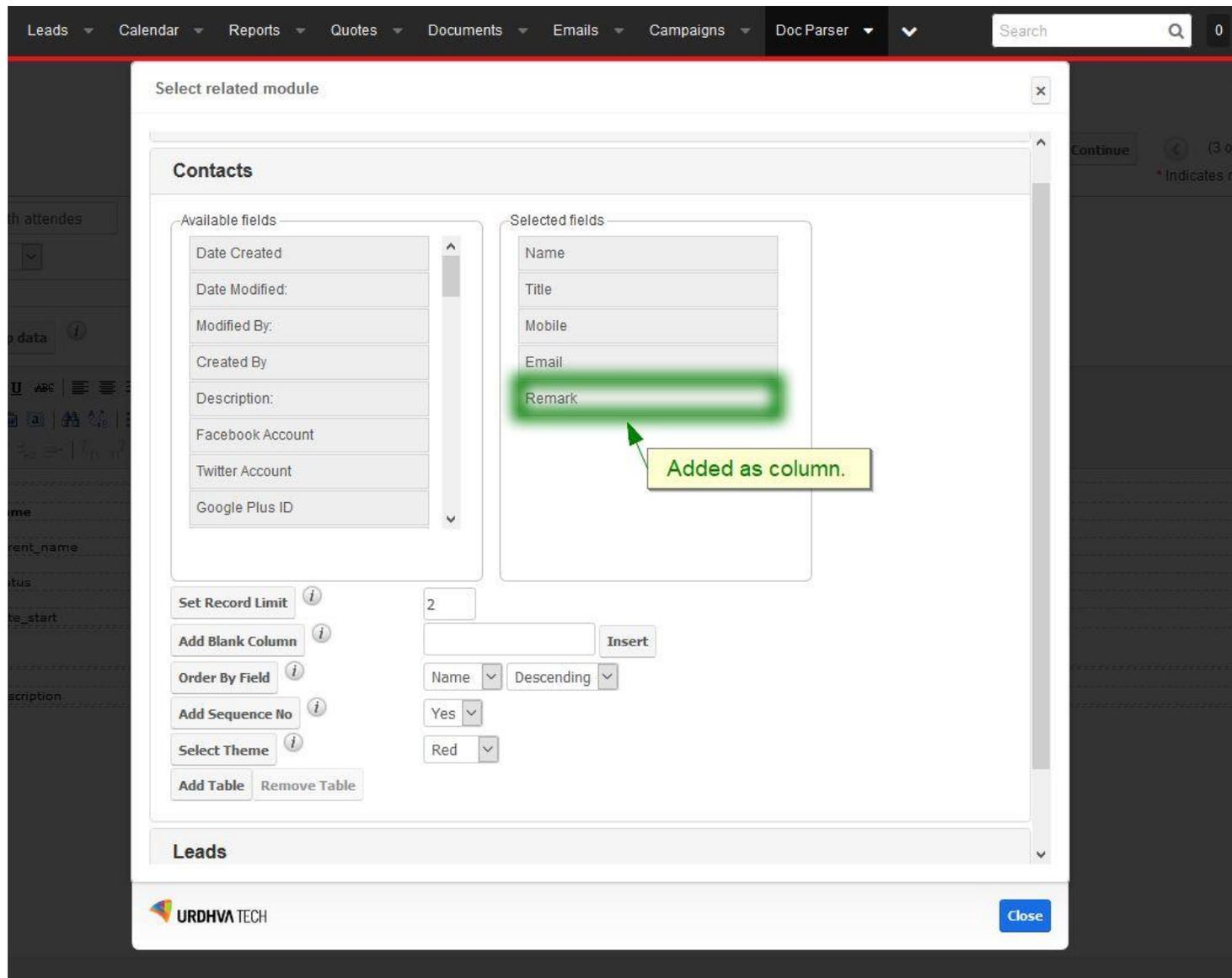
- Let's try to add "Contacts" record into template. When users clicked on "Contacts", popup will allow selecting field(s) for display, set limit to display records into document, option to add user define blank column, set order by field, option to add sequence number column and option to select theme. Have a look on following screenshot.

The screenshot shows a 'Select related module' dialog box for the 'Contacts' module. The dialog is divided into two main sections: 'Available fields' and 'Selected fields'. The 'Available fields' section lists various fields such as 'Date Created', 'Date Modified', 'Modified By', 'Created By', 'Description', 'Facebook Account', 'Twitter Account', and 'Google Plus ID'. The 'Selected fields' section lists 'Name', 'Title', 'Mobile', and 'Email'. Below these sections are several configuration options: 'Set Record Limit' (set to 2), 'Add Blank Column', 'Order By Field' (set to Name), 'Add Sequence No' (set to Yes), and 'Select Theme' (set to Red). There are also buttons for 'Remark', 'Insert', 'Add Table', and 'Remove Table'. The dialog is annotated with five green callout boxes:

- Set the limit on fetching the relationship records.** (Points to the 'Set Record Limit' input field)
- Allow option to add a blank column which will display along with the related records.** (Points to the 'Add Blank Column' button)
- Set the order by field. Relationship records will be sorted based on the selected field and order.** (Points to the 'Order By Field' dropdown)
- Allow option to add the sequence number column. This column will be added as the first column into the templates. Record counter/sequence will be displayed along with the related records.** (Points to the 'Add Sequence No' dropdown)
- Allow option to apply the predefined format on the related records table.** (Points to the 'Select Theme' dropdown)

The dialog also features a search bar at the top, a 'Close' button at the bottom right, and the 'URDHVA TECH' logo at the bottom left.

- ❖ **Set Record Limit:** User can set limit to fetch the relationships records.
- ❖ **Add Blank Column:** When user clicked on “Add Blank Column” button then empty textbox and Insert button will be display. User has to provide value into textbox and need to click on “Insert” button. Once “Insert” button is clicked, textbox value will be added into “Selected fields” portion as new blank column. Look at below image.



- ❖ Order By Field: Set the order by field. Relationship records will be sorted based on the selected field and order.
- ❖ Add Sequence No: Allow option to add the sequence number column. This column will be added as the first column into the templates. Record counter/sequence will be displayed along with the related records.
- ❖ Select Theme: Allow option to apply the predefined format on the related records table. DocParser provide some predefined format option for select. You can change it as per your needs.

➤ When user clicks on "Add Table" button, table will be added into template body. We have selected the theme "Red" into previous step so table will be added as follows into template body. But users can change the format as per their needs.

The screenshot shows a software interface for creating a meeting template. The navigation bar includes 'Accounts', 'Contacts', 'Opportunities', 'Leads', 'Calendar', 'Reports', and 'Doc Parser'. The main area displays a form for 'Sample Meeting with attendees' assigned to 'Urdhva Tech'. Below the form is a rich text editor with a toolbar and a template body containing fields for agenda, account, status, start date, assigned to, created on, last updated on, and date modified. A table titled 'Invitees' is highlighted with a green box, showing a red header row and a data row.

Invitees					
\$meetings_contacts__Contacts_ut_header					
Sr #	Name	Title	Mobile	Email	Remark
ut_sr_no	name	title	phone_mobile	email	Remark_ut_blank_column

We have added the relationship table for the Contacts module. Now let's add the relationship table for the Users and Leads module. Template body will be displayed as follows.

Accounts Contacts Opportunities Leads Calendar Reports Quotes Documents Emails Campaigns Calls Meetings

Sample Meeting with attendees » Edit

Save Cancel View Change Log

Name: * Sample Meeting with attendees Assigned to:

Base Module: * Meetings

Field Selection: Insert field

Choose relational data: Choose relationship data

Template Body:

HTML B I U ABC [List Icons] Styles Format Font Family Font Size

Agenda:

\$meetings_ name	Assigned to:
Account:	\$meetings_ assigned_user_name
\$meetings_ parent_name	Created on:
Status:	\$meetings_ date_entered
\$meetings_ status	Last updated on:
Start Date:	\$meetings_ date_modified
\$meetings_ date_start	

Description:

\$meetings_|description

Invitees

\$meetings_contacts__Contacts_ut_header

Sr #	Name	Title	Mobile	Email	Remark
ut_sr_no	name	title	phone_mobile	email	Remark_ut_blank_column

\$meetings_users__Users_ut_header

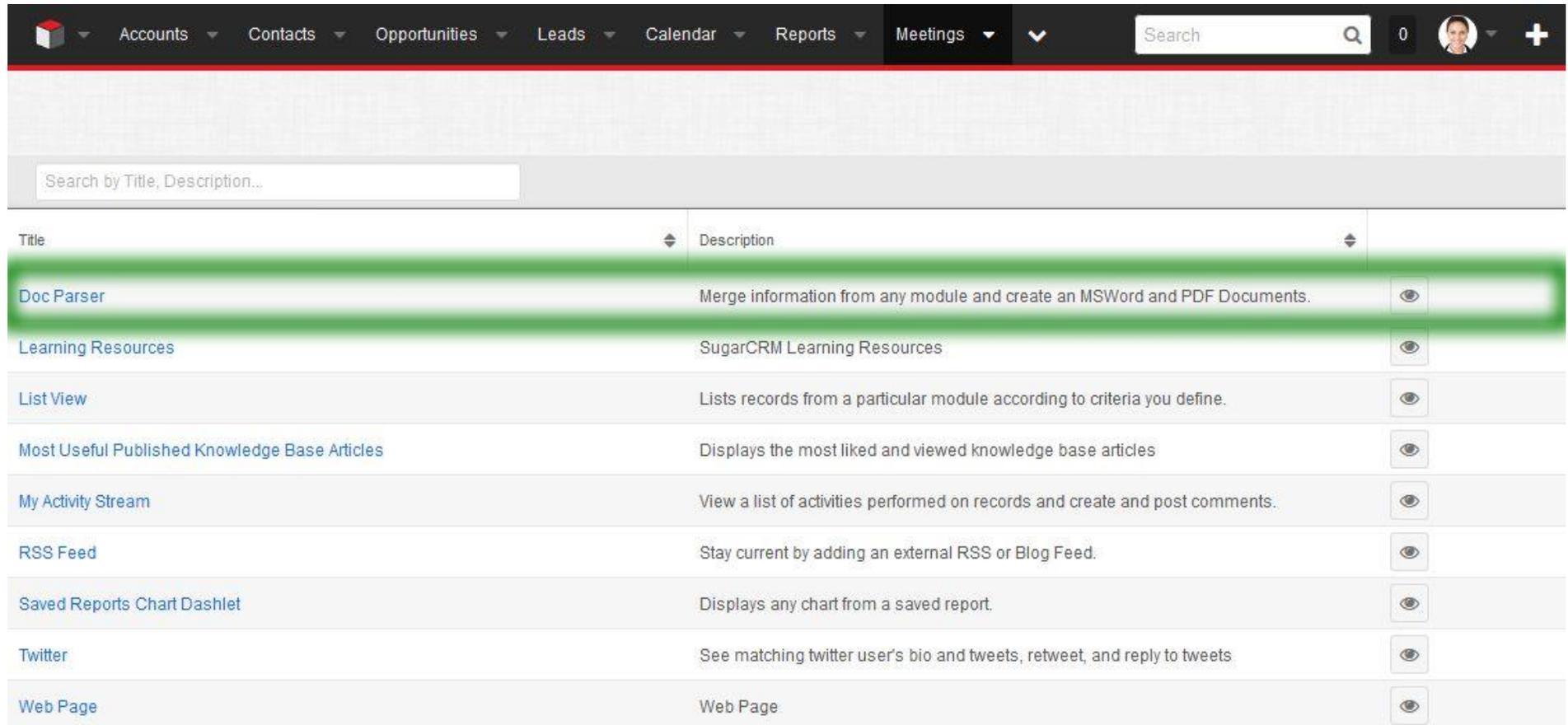
Name	Title	Department	Mobile	Email
full_name	title	department	phone_mobile	email

\$meetings_leads__Leads_ut_header

Name	Title	Mobile	Email	Lead Source	Remark
name	title	phone_mobile	email	lead_source	Remark_ut_blank_column

Example

- In above template creation steps we have selected “Meetings” module and its related Contacts, Users and Leads records for display. To generate WordDoc/PDF for sidecar module, user has to add “Doc Parser” dashlet as follows from RecordView and ListView.



The screenshot shows the SugarCRM dashboard interface. At the top, there is a navigation bar with tabs for Accounts, Contacts, Opportunities, Leads, Calendar, Reports, and Meetings. A search bar is located on the right side of the navigation bar. Below the navigation bar, there is a search input field with the placeholder text "Search by Title, Description...". The main content area displays a list of dashlets. The "Doc Parser" dashlet is highlighted with a green background. The list of dashlets includes:

Title	Description	Visibility
Doc Parser	Merge information from any module and create an MSWord and PDF Documents.	
Learning Resources	SugarCRM Learning Resources	
List View	Lists records from a particular module according to criteria you define.	
Most Useful Published Knowledge Base Articles	Displays the most liked and viewed knowledge base articles	
My Activity Stream	View a list of activities performed on records and create and post comments.	
RSS Feed	Stay current by adding an external RSS or Blog Feed.	
Saved Reports Chart Dashlet	Displays any chart from a saved report.	
Twitter	See matching twitter user's bio and tweets, retweet, and reply to tweets	
Web Page	Web Page	

- Once user select "Doc Parser" from dashlet ListView then it will be added into Dashboard section as follows.

The screenshot displays the SugarCRM interface. The top navigation bar includes various modules: Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, Documents, Emails, Campaigns, Calls, and Meetings. A search bar and user profile are also visible.

The main content area is split into two columns. The left column shows the details of a meeting titled "Discuss pricing". The meeting is scheduled for 2019-04-17 from 06:00pm to 07:30pm. The description is "Meeting to discuss project plan and hash out the details of implementation". The meeting type is "Sugar" and it is assigned to "Sarah Smith". The account is "Super Star Holdings Inc" and the team is "West (Primary)".

The right column shows the "My Dashboard" section. It contains two dashlets: "My Scheduled Meetings" and "Doc Parser". The "My Scheduled Meetings" dashlet shows a table with columns for Start Date, Subject, and Related to, but it currently displays "No data available.". The "Doc Parser" dashlet is highlighted with a green border and contains a "Parse Document" button.

At the bottom of the interface, there is a footer with the SugarCRM logo and navigation links for Mobile, Shortcuts, Tour, Feedback, Help, and Support.

- When user clicks on Parse Document, a popup will be open. A user can able to generate the PDF or WordDoc from there. Popup will display all the templates created for base module. Each template record has dropdown button for generate WordDoc/PDF file and download it. If base module has relationship with "Documents" module then user can also have option to relate WordDoc/PDF file directly to SugarCRM's "Documents" module.

The screenshot displays the SugarCRM interface for a meeting record titled "Discuss pricing". The meeting is scheduled for 2019-04-17 from 06:00pm to 07:30pm. The description is "Meeting to discuss project plan and hash out the details of implementation". The meeting type is "Sugar".

A popup window titled "Choose the DocParser Template" is open, showing a table of templates. The table has three columns: "Templates", "Download", and "Save to Documents". The first row shows a template named "Sample Meeting with attendees". The "Download" column for this template has a dropdown menu with two options: "Word file" and "PDF file".

The background interface shows a list of guests for the meeting, including Kandis Bloomfi..., Taunya Doshier, Maura Emmett, Rene Jun, and Melvin Lessley. The interface also shows a "Parse Document" button and a "URDHVA TECH" logo.

- When user click on the PDF file option system will ask for the PDF file to open or download as follows.

The screenshot shows a CRM interface for a meeting titled "Discuss pricing". The meeting details include a start and end date of 2019-04-17 from 06:00pm to 07:30pm, a location of "Sugar", and a description: "Meeting to discuss project plan and hash out the details of implementation". The meeting is assigned to Sarah Smith. A list of guests is shown with their names and "No Reply" status. A "Doc Parser" widget is visible on the right side of the dashboard.

Overlaid on the meeting details is a Firefox dialog box titled "Opening Discuss_pricing.pdf". The dialog contains the following text:

You have chosen to open:
Discuss_pricing.pdf
which is: Adobe Acrobat Document (430 KB)
from: http://localhost

What should Firefox do with this file?

- Open with Adobe Acrobat Reader DC (default)
- Save File
- Do this automatically for files like this from now on.

The dialog has "OK" and "Cancel" buttons at the bottom.

- We have set limit and order by for fetching "Contacts" record. There are 6 contacts are related with the meeting record as shown below. Generated WordDoc/PDF will contain 2 records as per the limit set by user and also records are order by on Name field.

Co Contacts (6) + ▾					
	Name	Account Name	Email	Office Phone	
☆	Evelyn Needleman	Airline Maintenance Co	sugar.support.beans@example.co.jp	(000) 705-2509	👁️ ▾
☆	Jamal Sloan	B.H. Edwards Inc	sales.support.im@example.de	(160) 328-2434	👁️ ▾
☆	Caryn Mcclelland	X-Sell Holdings	phone.sales.support@example.tw	(400) 500-3684	👁️ ▾
☆	Kandis Bloomfield	Cumberland Trails Inc	section51@example.info	(465) 039-3689	👁️ ▾
☆	Maura Emmett	JBC Banking Inc	qa.section.hr@example.com	(170) 127-0480	👁️ ▾
☆	Melvin Lessley	Super Star Holdings Inc	phone.dev@example.name	(056) 743-9979	👁️ ▾

➤ Generated PDF.

Agenda:
Discuss pricing
Account:
Super Star Holdings Inc
Status:
Scheduled
Start Date:
2019-04-17 06:00pm

Assigned to:
Sarah Smith
Created on:
2018-09-27 08:20am
Last updated on:
2018-09-27 08:20am

Description:
Meeting to discuss project plan and hash out the details of implementation

Invitees

Contacts

Sr #	Name	Title	Mobile	Email	Remark
1	Melvin Lessley	President	(918) 043-9411	phone.dev@example.name	
2	Maura Emmett	President	(617) 574-3708	qa.section.hr@example.com	

Users

Name	Title	Department	Mobile	Email
Sarah Smith	Sales Manager West			sarah@example.com
Will Westin	Sales Manager East			will@example.com
Chris Olliver	Senior Account Rep			chris@example.com

Leads

Name	Title	Mobile	Email	Lead Source	Remark
Melinda Penman	Mgr Operations	(236) 062-1486	section.kid.the@example.info	Support Portal User Registration	
Rene Jun	Director Operations	(474) 592-0405	qa.sales.sales@example.tv	Employee	

- In the previous example, Meetings module doesn't have any relationship with the SugarCRM's Documents module. So DocParser doesn't allow to relate WordDoc/PDF directly to Documents module.
- Let's check with Accounts module which has a relationship with the Documents module. So we can relate the doc to Documents module directly through DocParser. Following is the Account record which doesn't have any documents associated yet.

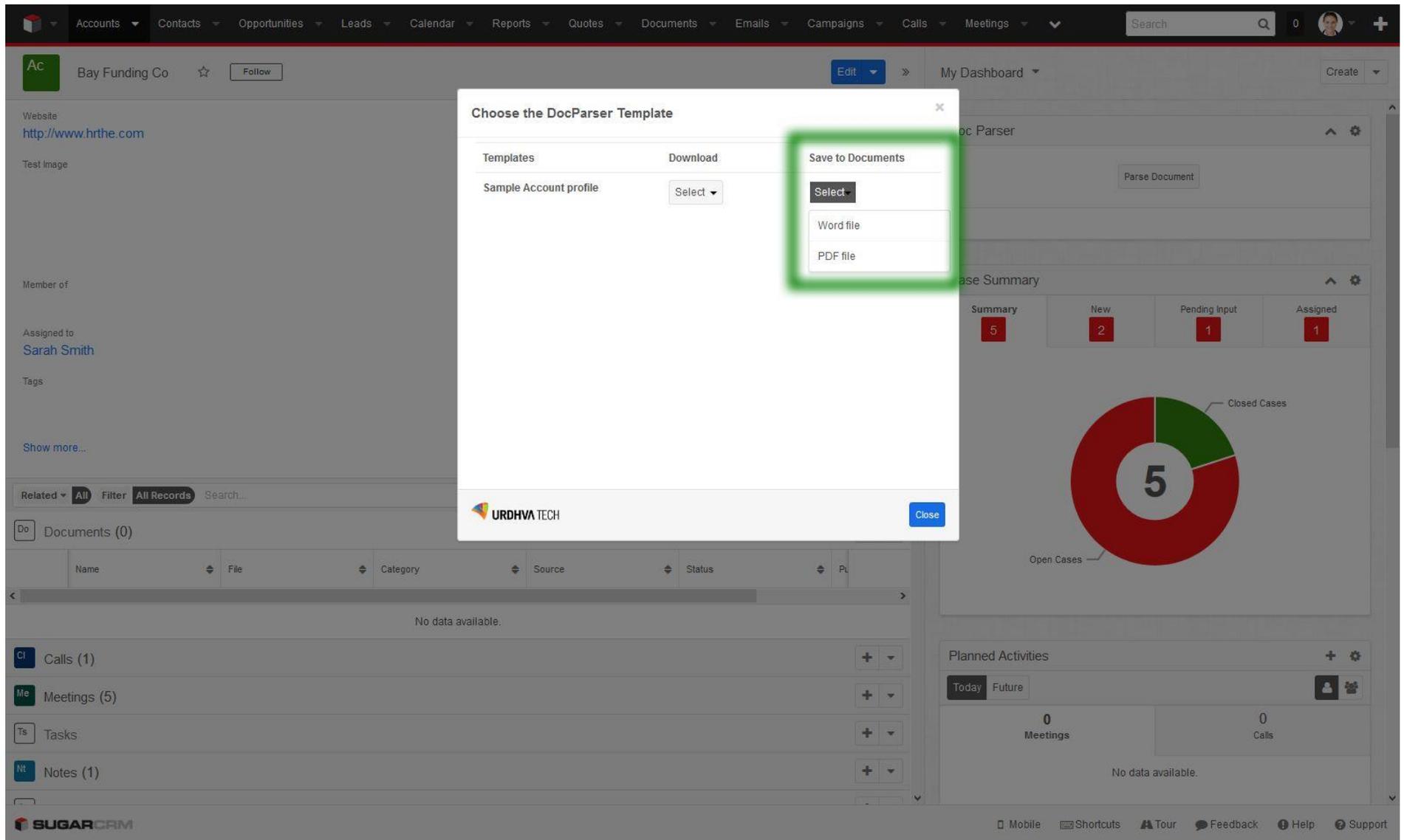
The screenshot displays the SugarCRM interface. The top navigation bar includes modules: Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, Documents, Emails, Campaigns, Calls, Meetings, and a search bar. The main content area shows an Account record for 'Bay Funding Co' with details such as Website (http://www.hrthe.com), Industry (Environmental), Member of (Sarah Smith), and Type (Customer). Below the record is a table for 'Documents (0)' with columns for Name, File, Category, Source, Status, and Pu, which is currently empty. A sidebar on the right contains a 'Doc Parser' widget with a 'Parse Document' button, a 'Case Summary' widget with a donut chart, and a 'Planned Activities' widget. The donut chart shows 5 Open Cases (red) and 0 Closed Cases (green). The Planned Activities widget shows 0 Meetings and 0 Calls.

Summary	New	Pending Input	Assigned
5	2	1	1

Category	Count
Open Cases	5
Closed Cases	0

Activity	Count
Meetings	0
Calls	0

- While clicked on the “Parse Document” button popup will be open as follows with the “Save to Documents” column.



- Once user clicked on the Word file/PDF file then Document record will be created and relate with the Account module as follows.

The screenshot displays the SugarCRM interface for an account named "Bay Funding Co". A green notification box at the top center reads: "Success Document saved. Click here to view it." Below this, a yellow callout box states: "Message will be display into RecordView once document record is created. User can click and view the document record from there." The main content area shows account details such as "Industry: Environmental", "Type: Customer", and "Assigned to: Sarah Smith". At the bottom, a table lists documents:

Name	File	Category	Source	Status	Pl
Bay_Funding_Co-Sample...	Bay_Funding_Co-Sample...		Sugar	Active	20

The table row is highlighted with a green border. To the right, a "Case Summary" widget shows a donut chart with a total of 5 cases, divided into "Open Cases" (red) and "Closed Cases" (green). The "Planned Activities" widget shows 0 meetings and 0 calls.

- Let's open the document record and download the PDF file from there.

The screenshot shows a CRM interface with a document record for "Bay_Funding_Co-Sample_Account_profile.pdf". The document is in "Active" status, revision 1, published on 2018-10-17, and assigned to Sarah Smith. A Firefox dialog box is open, asking what to do with the PDF file. The "Save File" option is selected. Below the dialog, a "Document Revisions" table shows the document's history.

File	Revision	Date Created	Created by	Change Log
Bay_Funding_Co-Sample_Account_profile.pdf	1	2018-10-17 03:24pm	Urdhva Tech	Document Created

➤ DocParser allow to generate the document from ListView also as follows.

The screenshot displays the SugarCRM interface. The top navigation bar includes various modules like Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, Documents, Emails, Campaigns, Calls, and Meetings. A search bar is present on the right. The main content area is titled 'Meetings (20 of 21+)' and features a table with columns for Subject, Related to, Start Date, Status, User, and Date Created. A message indicates that all 20 records are selected. The table lists various meetings with different statuses such as Canceled, Scheduled, and Held. On the right side, there is a 'My Dashboard' section with two widgets: 'My Scheduled Meetings' (showing 'No data available') and 'Doc Parser' (highlighted with a green box, containing a 'Parse Document' button). The SugarCRM logo is visible in the bottom left corner, and utility links like Mobile, Shortcuts, Tour, Feedback, Help, and Support are in the bottom right.

<input checked="" type="checkbox"/>	Subject	Related to	Start Date	Status	User	Date Created	
<input checked="" type="checkbox"/>	Demo	B.H. Edwards Inc	2019-07-06 08:00pm	Canceled	Will Westin	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Review needs	X-Sell Holdings	2018-10-04 06:15pm	Scheduled	Sally Bronsen	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Discuss pricing	Cumberland Trails Inc	2019-02-10 12:30am	Held	Sally Bronsen	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Review needs	JBC Banking Inc	2018-11-26 06:45pm	Scheduled	Will Westin	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Initial discussion	JJ Resources Inc	2018-12-25 04:00pm	Held	Will Westin	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Demo	International Art Inc	2019-08-20 12:45am	Scheduled	Max Jensen	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Discuss pricing	JJ Resources Inc	2019-04-29 06:15pm	Canceled	Will Westin	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Discuss pricing	J.K.M. Corp (HA)	2019-08-16 01:00am	Canceled	Max Jensen	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Follow-up on proposal	Spend Thrift Inc	2019-07-03 05:45pm	Canceled	Sarah Smith	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Initial discussion	NW Capital Corp	2019-04-15 04:30pm	Held	Max Jensen	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Review needs	South Sea Plumbing ...	2019-02-16 06:00pm	Scheduled	Sarah Smith	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Follow-up on proposal	South Sea Plumbing ...	2019-09-09 04:15pm	Held	Sarah Smith	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Discuss pricing	J.K.M. Corp (HA)	2019-06-11 12:00pm	Canceled	Max Jensen	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Review needs	MTM Investment Bank...	2019-02-23 07:30pm	Held	Will Westin	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Follow-up on proposal	Airline Maintenance Co	2018-10-21 08:00pm	Scheduled	Sally Bronsen	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Initial discussion	Super Star Holdings Inc	2019-05-06 12:15pm	Held	Sarah Smith	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Initial discussion	JAB Funds Ltd.	2019-08-17 01:15am	Scheduled	Will Westin	2018-09-27 08:20am	
<input checked="" type="checkbox"/>	Follow-up on proposal	White Cross Co	2019-04-21 05:45pm	Scheduled	Sally Bronsen	2018-09-27 08:20am	

- If a user has selected more than one record into ListView then DocParser will create zip file and allow a user to download it. Zip will include all the records with the filename as RECORDNAME_DATE("YMDHIS).pdf/.doc

The screenshot displays a CRM interface with a top navigation bar containing various menu items: Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, Documents, Emails, Campaigns, Calls, Meetings, and a search bar. The main content area is titled "Meetings (20 of 21+)" and features a table with columns for Subject, Related to, Start Date, Status, User, and Date Created. A yellow banner above the table indicates that all 20 records are selected. A modal dialog box is open in the center, titled "Opening Meetings_20181017153747.zip", which prompts the user to choose how to open the file. The dialog shows the file name "Meetings_20181017153747.zip" (5.9 MB) and offers options to "Open with WinRAR archiver (default)", "Save File", or "Do this automatically for files like this from now on". The "Save File" option is selected. On the right side of the interface, there are two panels: "My Scheduled Meetings" (showing "No data available.") and "Doc Parser" (with a "Parse Document" button).

Subject	Related to	Start Date	Status	User	Date Created
Demo	B.H. Edwards Inc	2019-07-06 08:00pm			
Review needs	X-Sell Holdings	2018-10-04 06:15pm			
Discuss pricing	Cumberland Trails Inc	2019-02-10 12:30am			
Review needs	JBC Banking Inc	2018-11-26 06:45pm			
Initial discussion	JJ Resources Inc	2018-12-25 04:00pm			
Demo	International Art Inc	2019-08-20 12:45am			
Discuss pricing	JJ Resources Inc	2019-04-29 06:15pm			
Discuss pricing	J.K.M. Corp (HA)	2019-08-16 01:00am			
Follow-up on proposal	Spend Thrift Inc	2019-07-03 05:45pm			
Initial discussion	NW Capital Corp	2019-04-15 04:30pm	Held	Max Jensen	2018-09-27 08:20am
Review needs	South Sea Plumbing ...	2019-02-16 06:00pm	Scheduled	Sarah Smith	2018-09-27 08:20am
Follow-up on proposal	South Sea Plumbing ...	2019-09-09 04:15pm	Held	Sarah Smith	2018-09-27 08:20am
Discuss pricing	J.K.M. Corp (HA)	2019-06-11 12:00pm	Canceled	Max Jensen	2018-09-27 08:20am
Review needs	MTM Investment Bank...	2019-02-23 07:30pm	Held	Will Westin	2018-09-27 08:20am
Follow-up on proposal	Airline Maintenance Co	2018-10-21 08:00pm	Scheduled	Sally Bronsen	2018-09-27 08:20am
Initial discussion	Super Star Holdings Inc	2019-05-06 12:15pm	Held	Sarah Smith	2018-09-27 08:20am
Initial discussion	JAB Funds Ltd.	2019-08-17 01:15am	Scheduled	Will Westin	2018-09-27 08:20am
Follow-up on proposal	White Cross Co	2019-04-21 05:45pm	Scheduled	Sally Bronsen	2018-09-27 08:20am

- If user has selected only single record into ListView then DocParser allow to download individual WordDoc/PDF file.

The screenshot displays a CRM interface with a top navigation bar containing various menu items like Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, Documents, Emails, Campaigns, Calls, and Meetings. A search bar is located on the right side of the navigation bar. Below the navigation bar, the main content area is titled "Meetings (20 of 21+)" and features a "Create" button. A table lists various meetings with columns for Subject, Related to, Start Date, Status, User, and Date Created. A modal dialog box is open over the table, titled "Opening Review_needs.pdf". The dialog box contains the following text: "You have chosen to open: Review_needs.pdf which is: Adobe Acrobat Document (429 KB) from: http://localhost". Below this text, it asks "What should Firefox do with this file?" and provides three options: "Open with Adobe Acrobat Reader DC (default)", "Save File" (which is selected), and "Do this automatically for files like this from now on." There are "OK" and "Cancel" buttons at the bottom of the dialog box. On the right side of the interface, there is a "My Dashboard" section with a "Create" button and two sub-sections: "My Scheduled Meetings" and "Doc Parser". The "My Scheduled Meetings" section shows "No data available." and the "Doc Parser" section has a "Parse Document" button.

Subject	Related to	Start Date	Status	User	Date Created
Demo	B.H. Edwards Inc	2019-07-06 08:00pm	Canceled	Will Westin	2018-09-27 08:20am
Review needs	X-Sell Holdings	2018-10-04 06:15pm			
Discuss pricing	Cumberland Trails Inc	2019-02-10 12:30am			
Review needs	JBC Banking Inc	2018-11-26 06:45pm			
Initial discussion	JJ Resources Inc	2018-12-25 04:00pm			
Demo	International Art Inc	2019-08-20 12:45am			
Discuss pricing	JJ Resources Inc	2019-04-29 06:15pm			
Discuss pricing	J.K.M. Corp (HA)	2019-08-16 01:00am			
Follow-up on proposal	Spend Thrift Inc	2019-07-03 05:45pm			
Initial discussion	NW Capital Corp	2019-04-15 04:30pm			
Review needs	South Sea Plumbing ...	2019-02-16 06:00pm	Scheduled	Sarah Smith	2018-09-27 08:20am
Follow-up on proposal	South Sea Plumbing ...	2019-09-09 04:15pm	Held	Sarah Smith	2018-09-27 08:20am
Discuss pricing	J.K.M. Corp (HA)	2019-06-11 12:00pm	Canceled	Max Jensen	2018-09-27 08:20am
Review needs	MTM Investment Bank...	2019-02-23 07:30pm	Held	Will Westin	2018-09-27 08:20am
Follow-up on proposal	Airline Maintenance Co	2018-10-21 08:00pm	Scheduled	Sally Bronsen	2018-09-27 08:20am
Initial discussion	Super Star Holdings Inc	2019-05-06 12:15pm	Held	Sarah Smith	2018-09-27 08:20am
Initial discussion	JAB Funds Ltd.	2019-08-17 01:15am	Scheduled	Will Westin	2018-09-27 08:20am
Follow-up on proposal	White Cross Co	2019-04-21 05:45pm	Scheduled	Sally Bronsen	2018-09-27 08:20am
Review needs	Constata Trust LLC	2019-01-13 06:30pm	Held	Jim Brennan	2018-09-27 08:20am

➤ Same way, user can also create the multiple Documents module's records from the ListView.

The screenshot displays the SugarCRM interface with a modal dialog box titled "Choose the DocParser Template". The dialog box has three columns: "Templates", "Download", and "Save to Documents". Under "Templates", there is a row for "Sample Account profile". The "Download" column has a "Select" dropdown menu. The "Save to Documents" column has a "Select" dropdown menu with a green box highlighting the "PDF file" option. The background shows a list of accounts with columns for Name, City, and Billing Country. The SugarCRM logo is visible at the bottom left, and navigation links for Mobile, Shortcuts, Tour, Feedback, Help, and Support are at the bottom right.

Templates	Download	Save to Documents
Sample Account profile	Select	Select Word file PDF file

Name	City	Billing Country
Constrata Trust LLC	Los Angeles	USA
South Sea Plumbing Products	Los Angeles	USA
Kinglge Bell IncK.A. Tower & Co	Alabama	USA
A.G. Parr PLC	Sunnyvale	USA
RR. Talker Co	San Jose	USA
Airline Maintenance Co	Ohio	USA
Overhead & Underfoot Ltd.	Santa Monica	USA
Kings Royalty Trust	St. Petersburg	USA
Complete Holding	Persistence	USA
B.H. Edwards Inc	San Mateo	USA
TJ O'Rourke Inc	Kansas City	USA
Riviera Hotels	Kansas City	USA
A.D. Importing Company Inc	Ohio	USA
Spend Thrift Inc	San Francisco	USA
Cumberland Trails Inc	Alabama	USA
Sandeon Consolidation Corp	San Mateo	USA
White Cross Co	Salt Lake City	USA
Union Bank	Persistence	USA

- All the Documents record will be relate to their respective base module record. Message will be display as follows into ListView.

The screenshot displays the SugarCRM interface. At the top, a navigation bar includes tabs for Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, Documents, Emails, Campaigns, Calls, and Meetings. A search bar and user profile are on the right. Below the navigation, a success message box is visible: "Success Document(s) are saved. Please check Documents subpanel under Accounts DetailView." Below this, a table lists accounts with columns for Name, City, Billing Country, Phone, Test Image, User, and Email. A yellow callout box highlights the first row with the text: "Message will be display into ListView once document records are created." To the right, a sidebar contains a "My Dashboard" section with "My Accounts" and "Doc Parser" subpanels. The "My Accounts" subpanel shows "No data available." The "Doc Parser" subpanel has a "Parse Document" button. At the bottom, the SugarCRM logo and navigation links for Mobile, Shortcuts, Tour, Feedback, Help, and Support are visible.

Name	City	Billing Country	Phone	Test Image	User	Email
Constrata Trust LLC	Los Angeles					
South Sea Plumbing Products	Los Angeles	USA	(750) 575-3911		Sarah Smith	phor
Kringle Bell IncK.A. Tower & Co	Alabama	USA	(980) 531-8203		Max Jensen	bear
A.G. Parr PLC	Sunnyvale	USA	(648) 452-3486		Chris Olliver	supp
RR. Talker Co	San Jose	USA	(509) 959-8072		Max Jensen	secti
Airline Maintenance Co	Ohio	USA	(100) 972-7766		Sally Bronsen	vega
Overhead & Underfoot Ltd.	Santa Monica	USA	(198) 916-0187		Will Westin	im.in
Kings Royalty Trust	St. Petersburg	USA	(093) 497-1680		Sarah Smith	supp
Complete Holding	Persistence	USA	(272) 434-2784		Sally Bronsen	vega
B.H. Edwards Inc	San Mateo	USA	(679) 913-0662		Will Westin	suga
TJ O'Rourke Inc	Kansas City	USA	(281) 237-9449		Sally Bronsen	dev6
Riviera Hotels	Kansas City	USA	(088) 911-0785		Max Jensen	the7
A.D. Importing Company Inc	Ohio	USA	(196) 139-3356		Will Westin	info.l
Spend Thrift Inc	San Francisco	USA	(553) 253-7874		Sarah Smith	devl
Cumberland Trails Inc	Alabama	USA	(215) 892-0277		Sally Bronsen	secti
Sandeon Consolidation Corp	San Mateo	USA	(898) 331-3265		Chris Olliver	vega
White Cross Co	Salt Lake City	USA	(237) 017-2177		Sally Bronsen	the7
Union Bank	Persistence	USA	(877) 626-0868		Sarah Smith	secti
Cloud Cover Trust	Salt Lake City	USA	(509) 789-4042		Jim Brennan	suga



CONTACT US



CONTACT@URDHVA-TECH.COM



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