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.

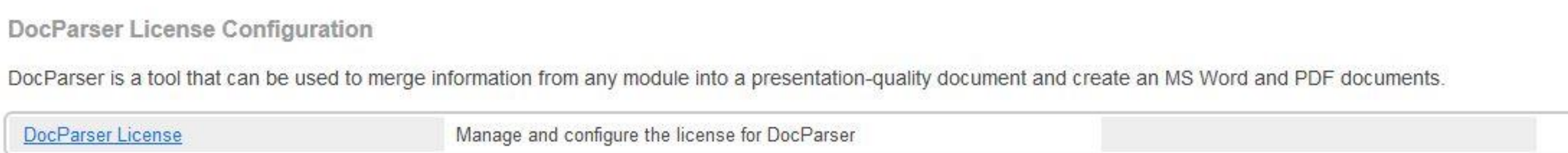
  DocParser - Sugaroutfitters

How to install?

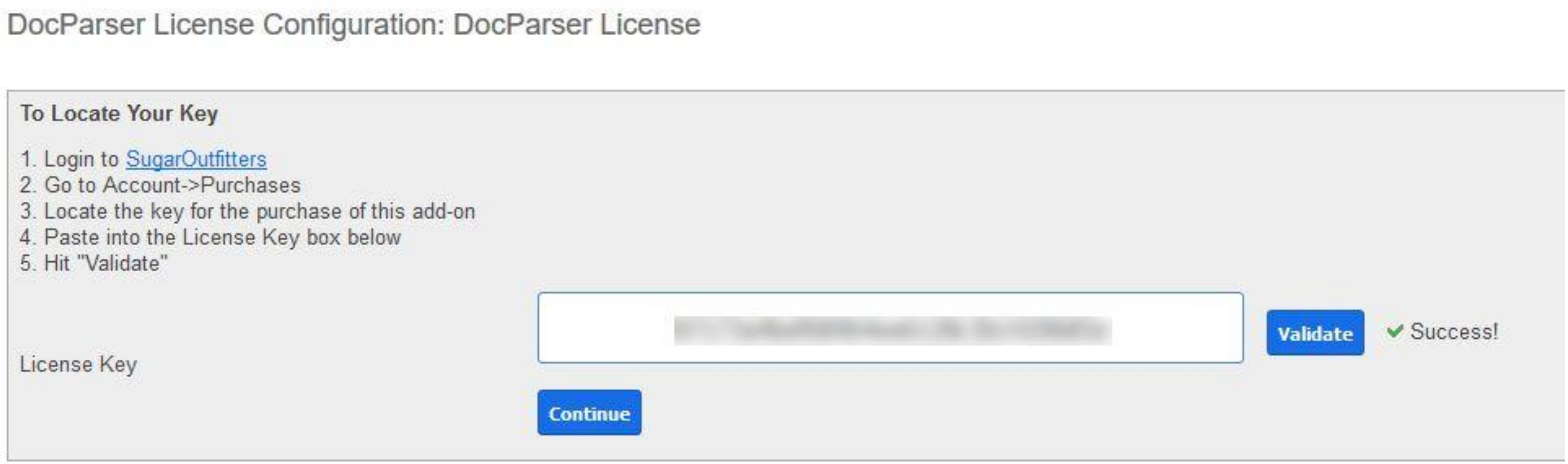
- Navigate to Admin > Module Loader and select the zip file, that you would have received upon the purchase. Follow the installation process.

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.

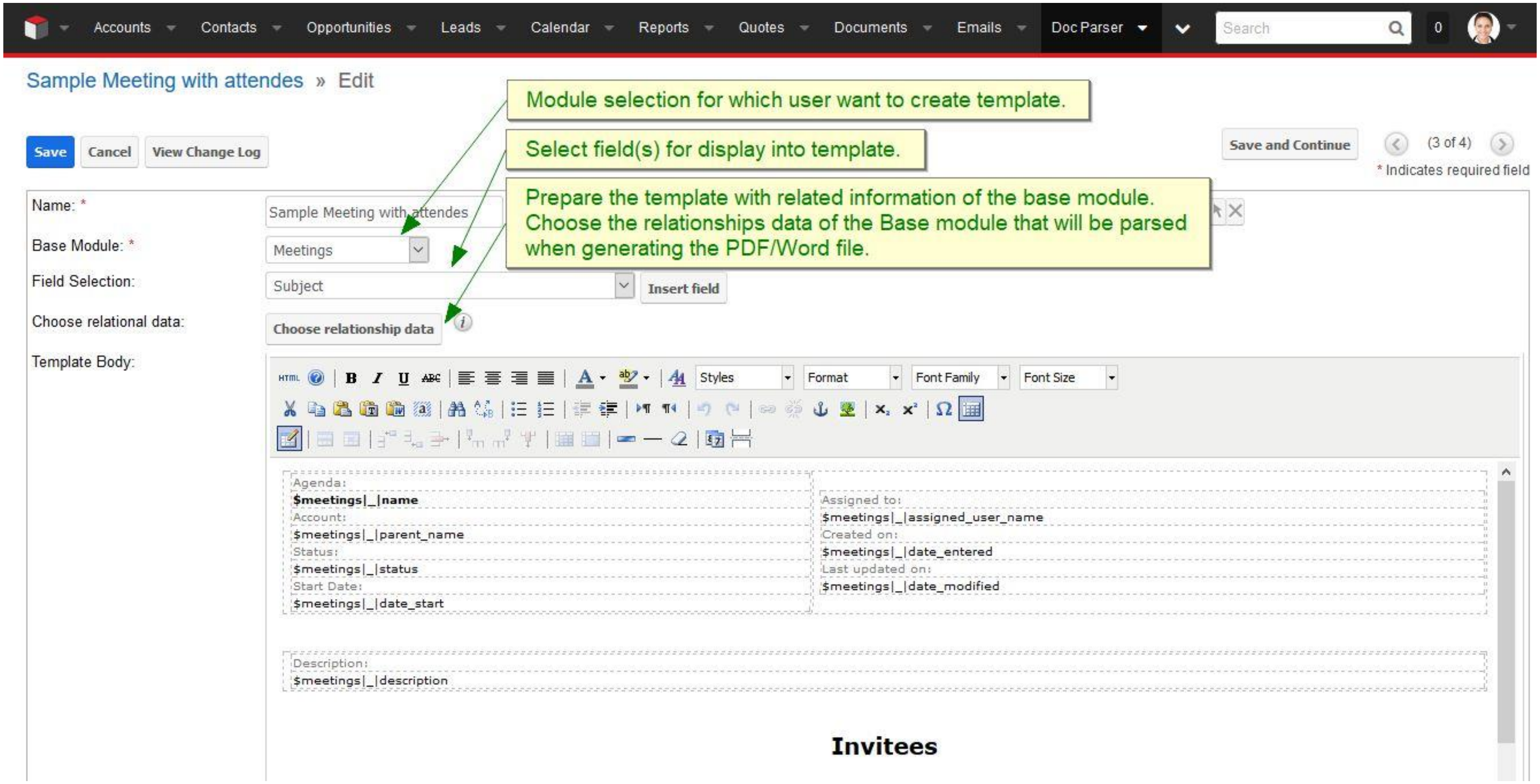


➢ Provide the license key that you have received upon purchase and validate it.



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.

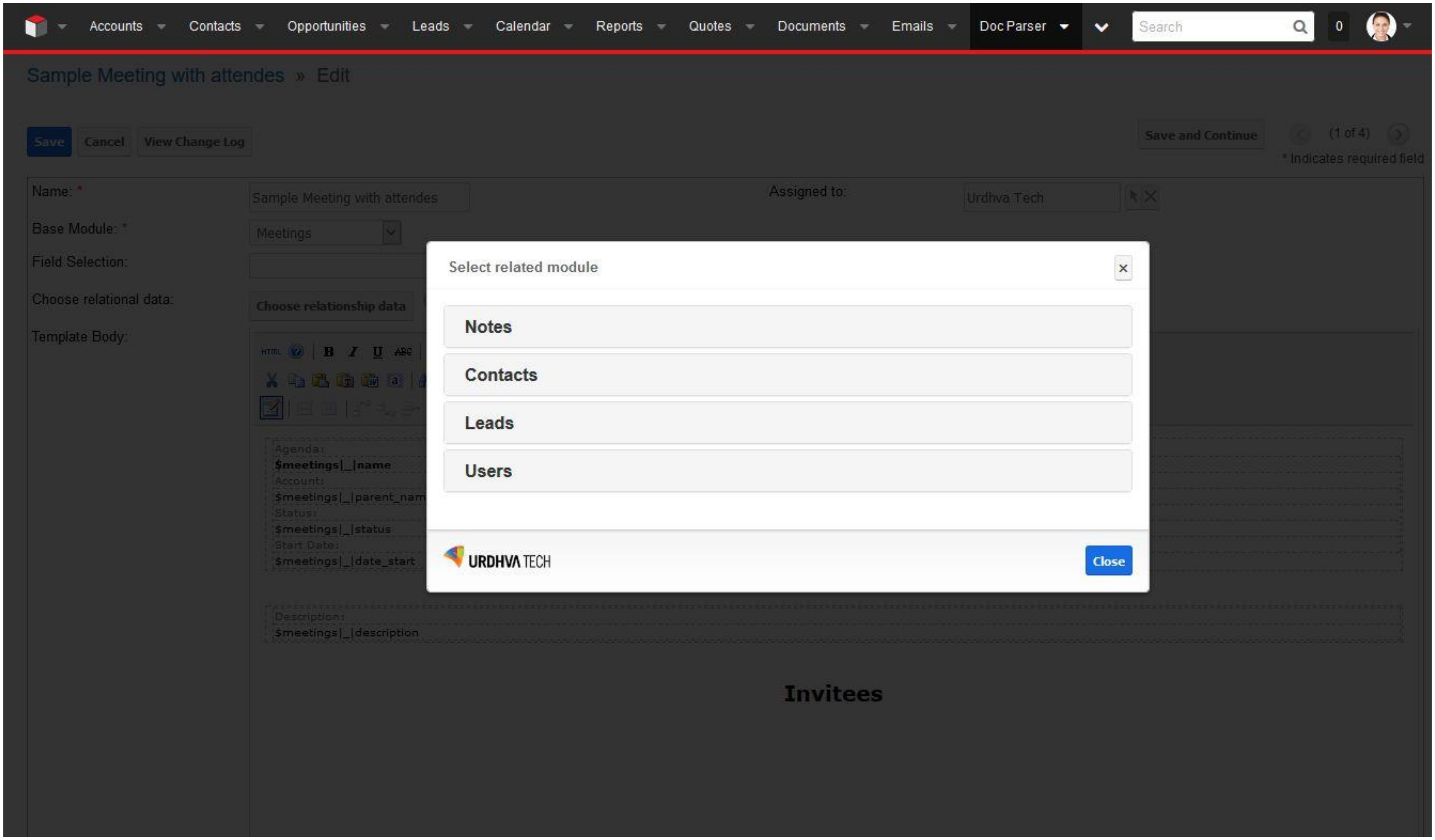


❖ Base Module: Module selection for which user wants to create Doc Parser template.

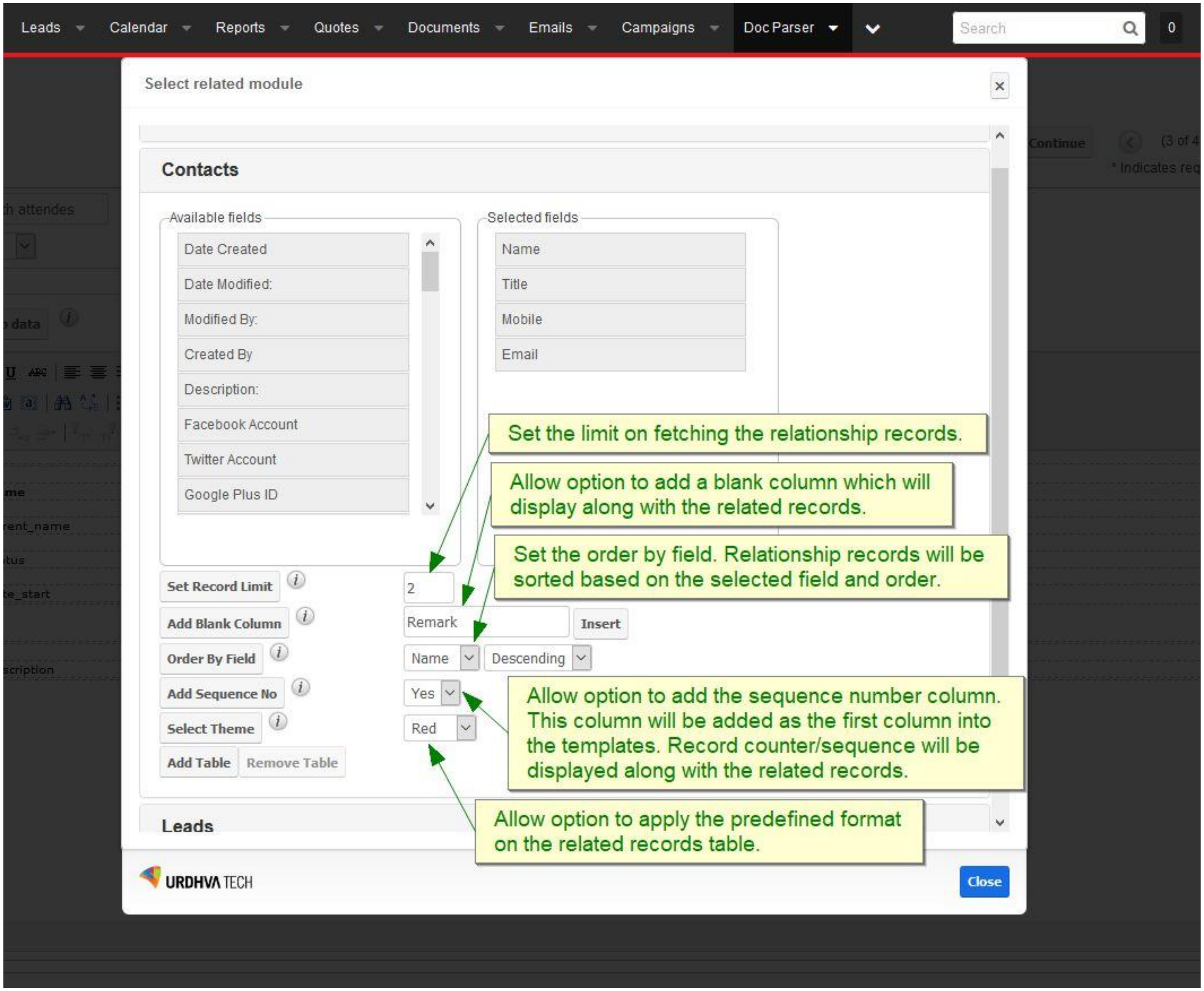
❖ Field Selection: Select field(s) for display into template. After field selection, user has to click "Insert Field" button to include field into template body.

❖ Choose Relationship Data Button: Select subpanel(s) for display into template.

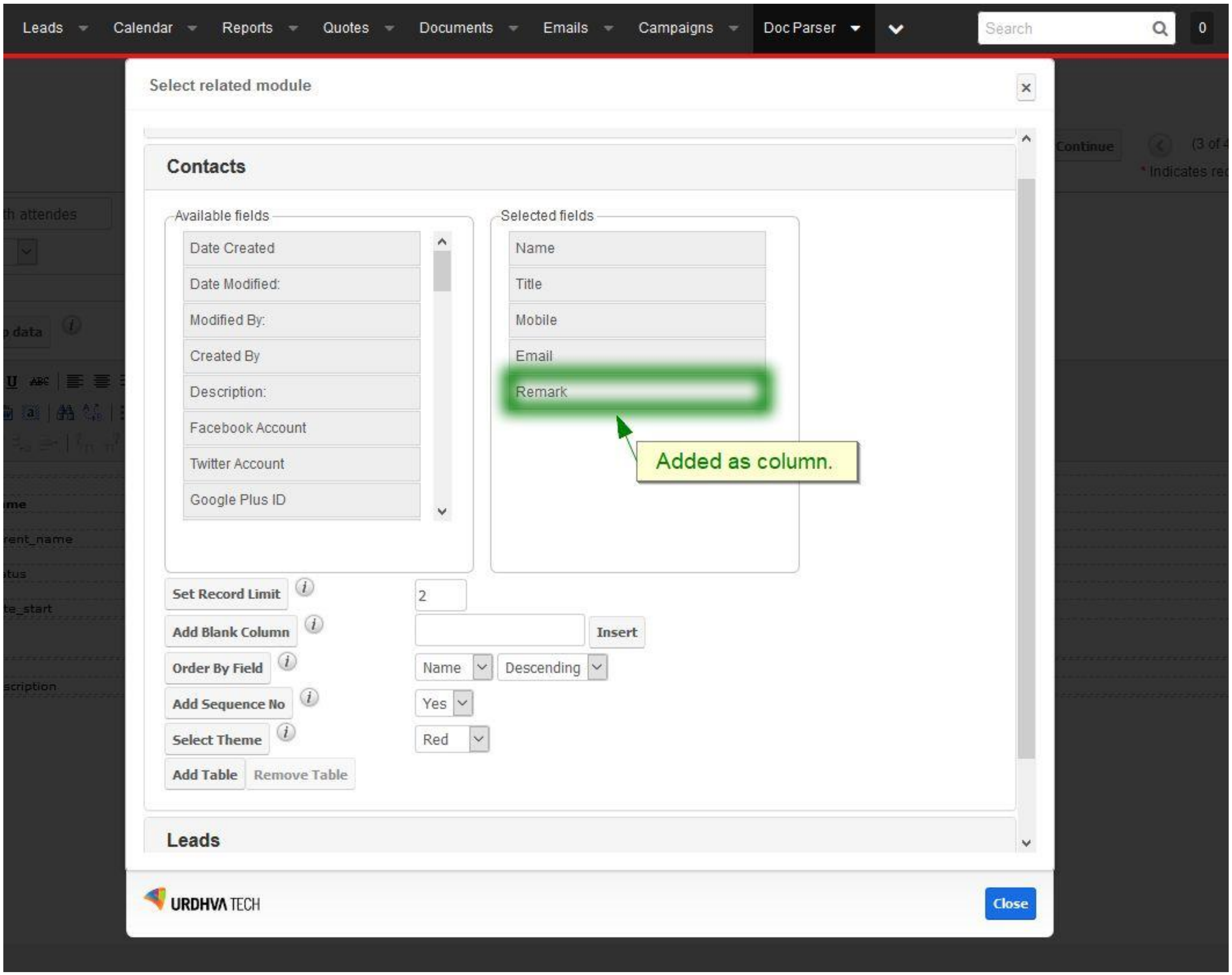
- When user clicked on “Choose Relationship Data” button then popup will open as follows. Popup contains all the subpanel(s) which is display under Base Module. We have selected “Meetings” module as base module that’s why popup allows option to include records from Contacts, Users, Leads and Notes module.



➢ 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.

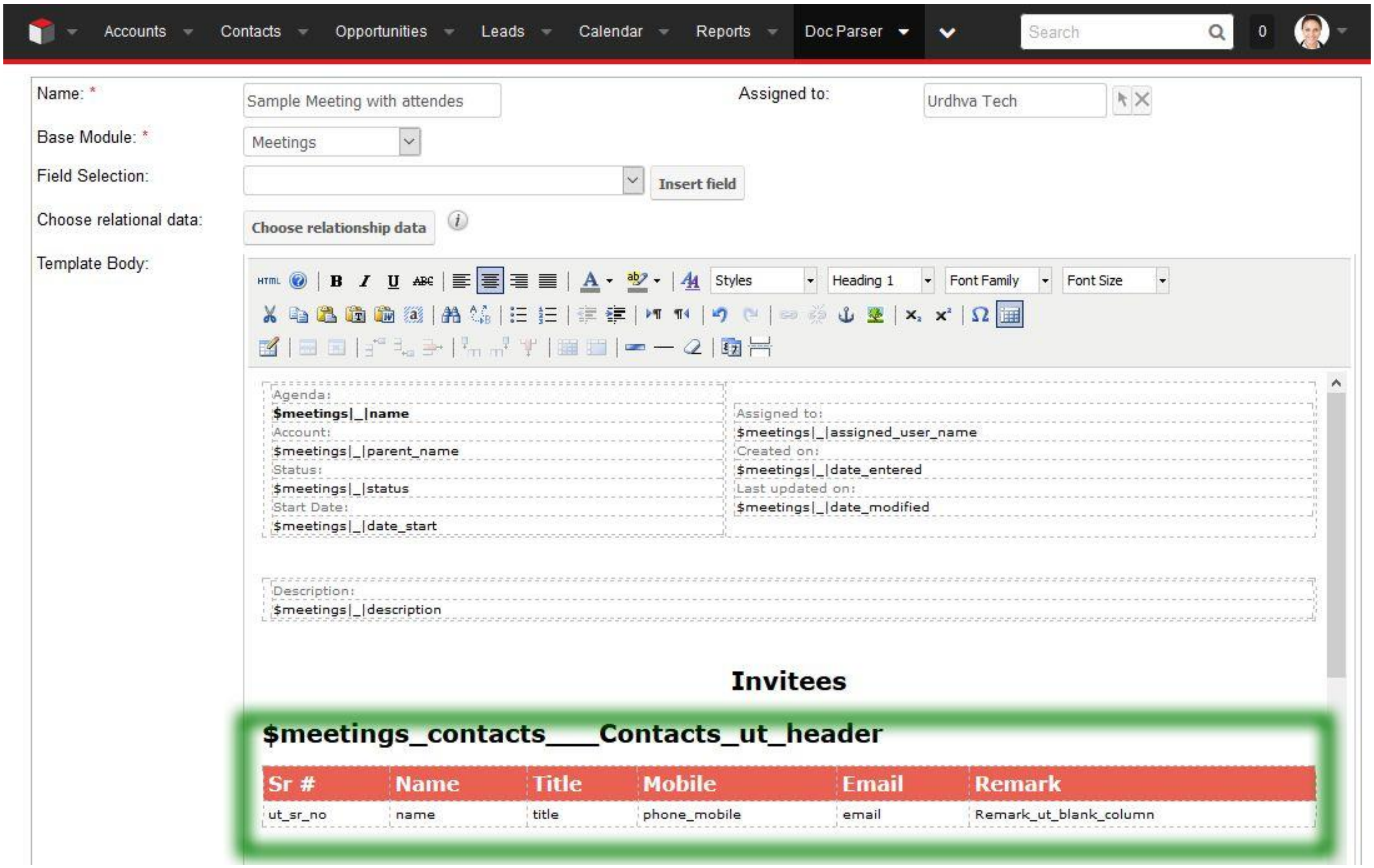


- **Set Record Limit:** User can set limit to fetch the relationships records.
- **Add Blank Column:** When user clicked on "Add Blank Column" button then empty textbox and Insert button will be display. User has to provide value into textbox and need to click on "Insert" button. Once "Insert" button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

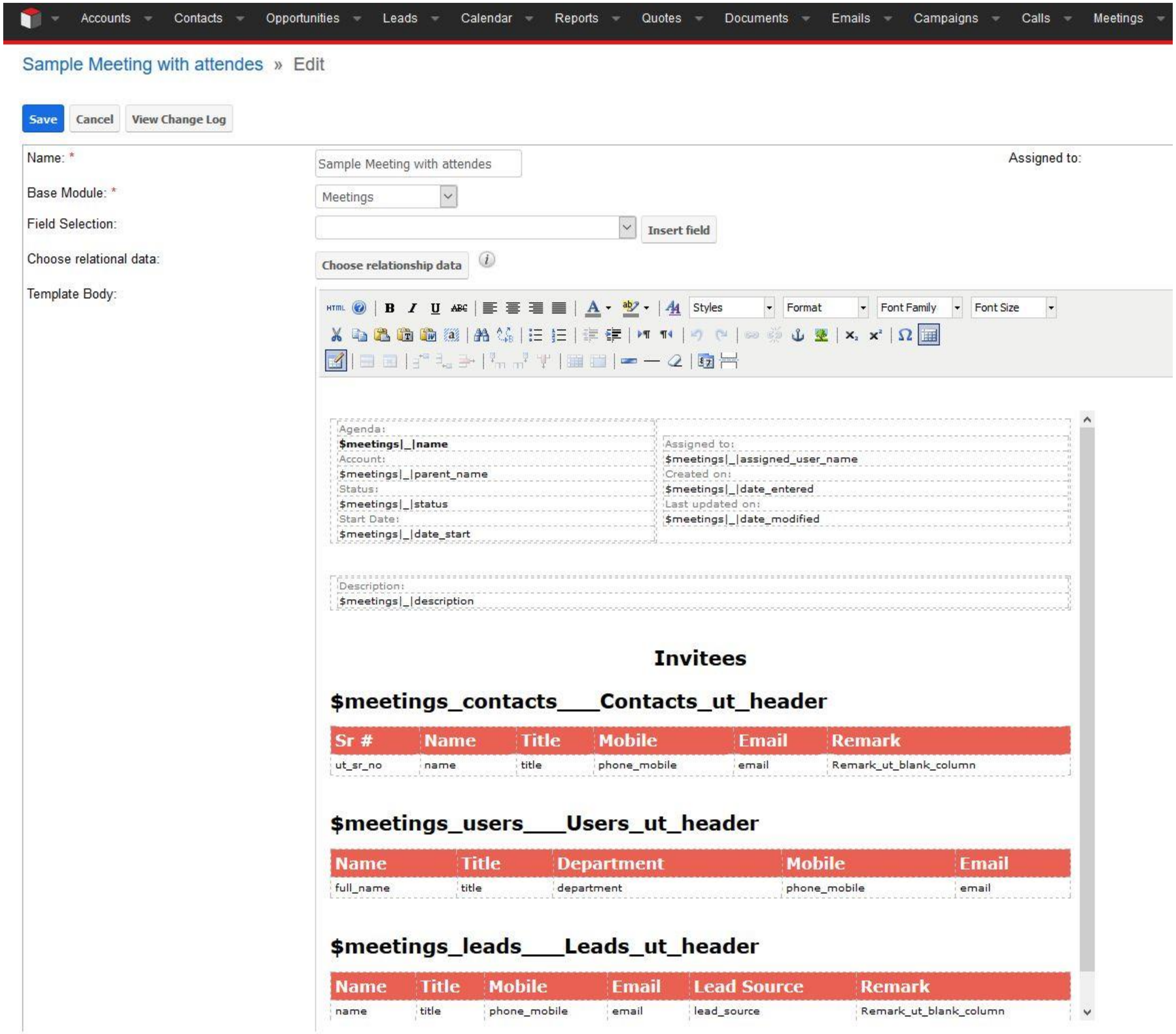


- Order By Field: Set the order by field. Relationship records will be sorted based on the selected field and order.
- Add Sequence No: Allow option to add the sequence number column. This column will be added as the first column into the templates. Record counter/sequence will be displayed along with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

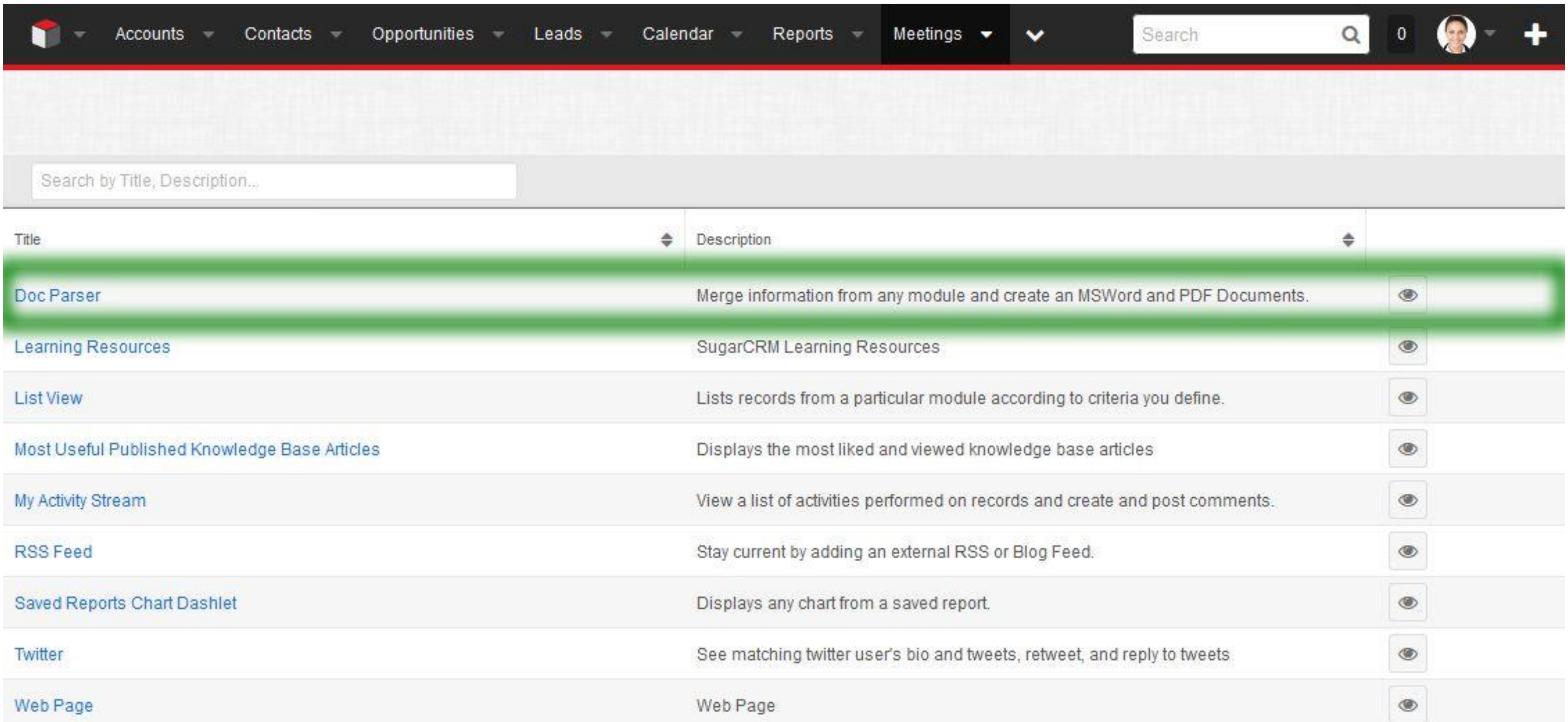


We have added the relationship table for the Contacts module. Now let's add the relationship table for the Users and Leads module. Template body will be displayed as follows.

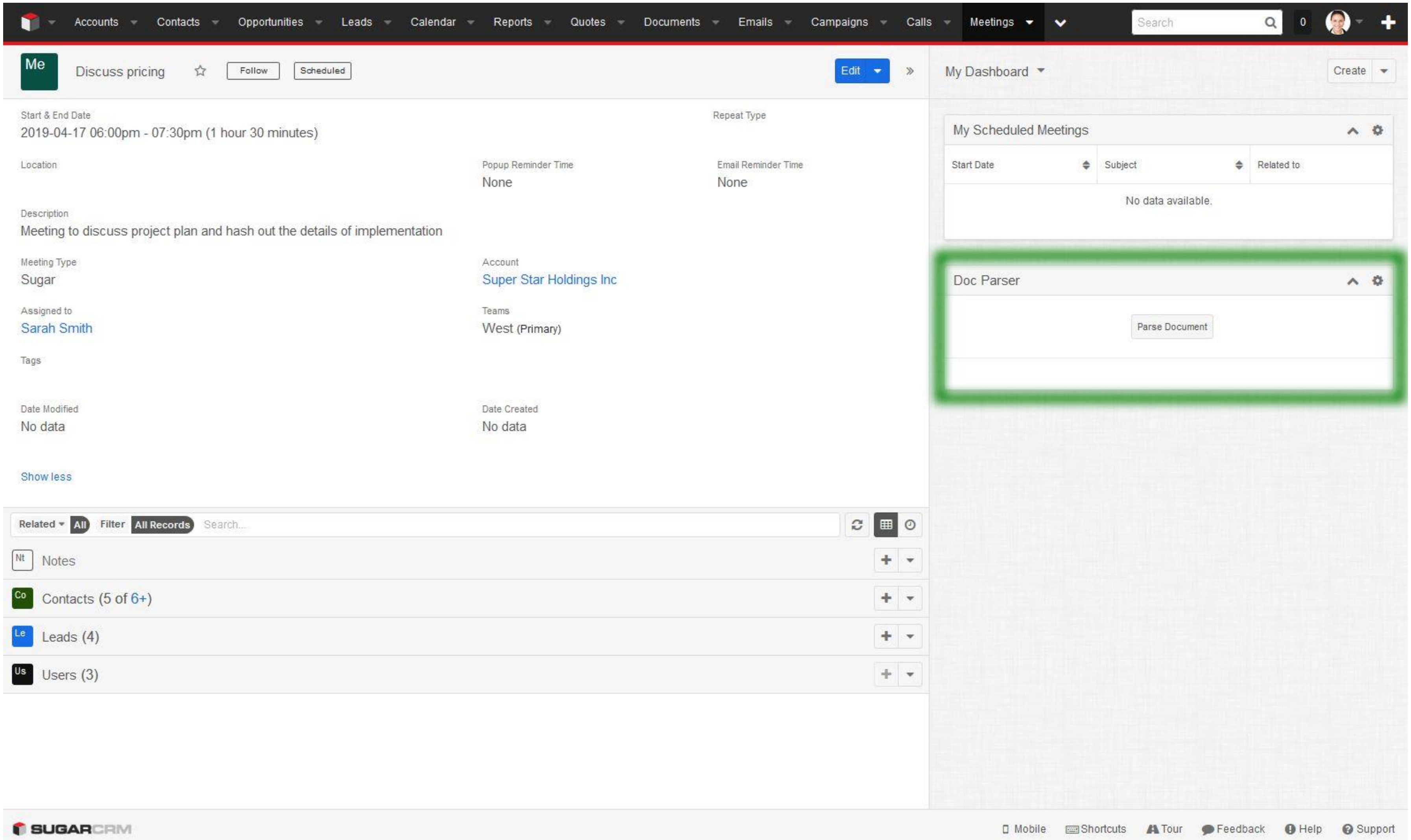


Example

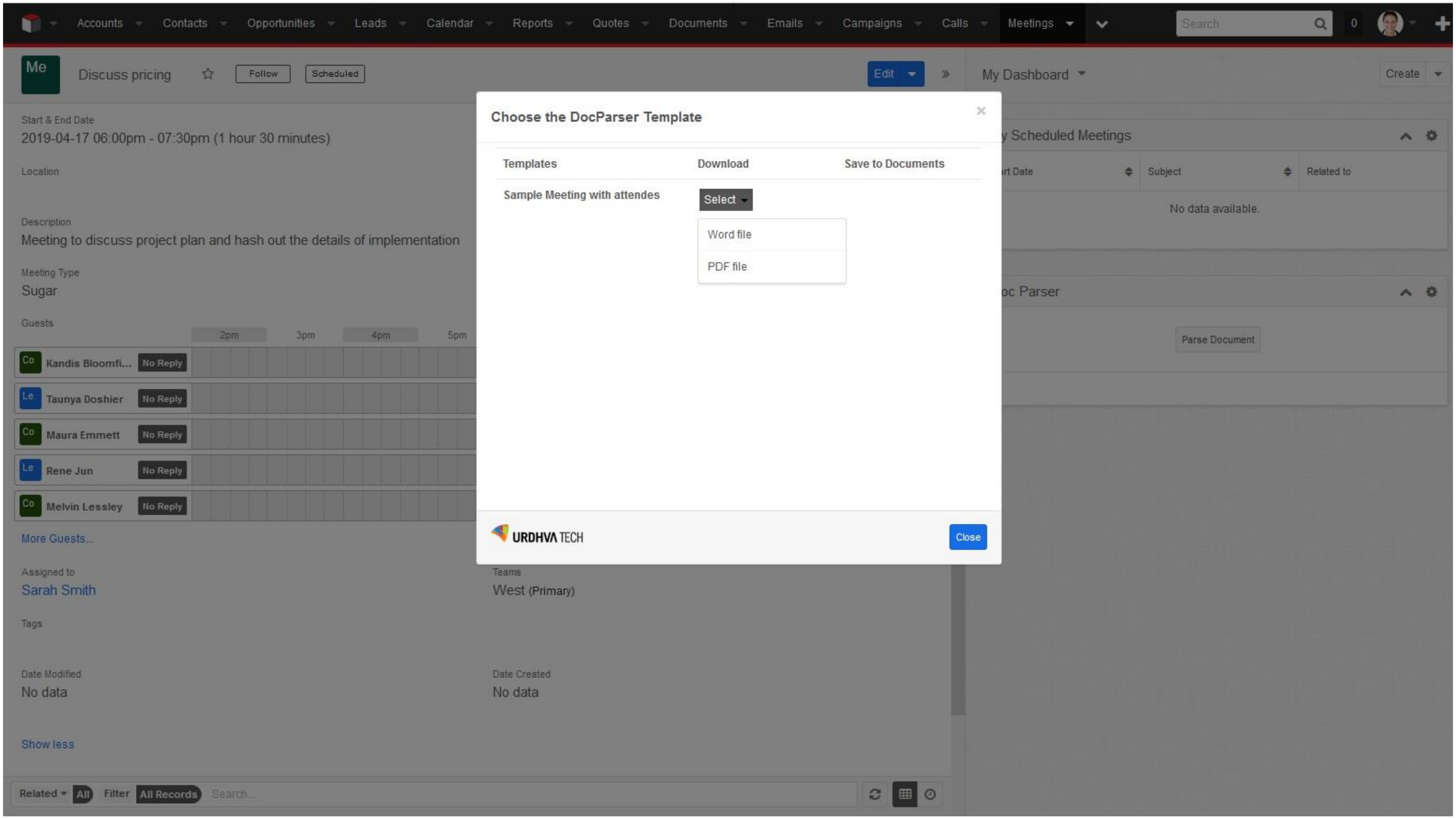
- In above template creation steps we have selected "Meetings" module and its related Contacts, Users and Leads records for display. To generate WordDoc/PDF for sidecar module, user has to add "Doc Parser" dashlet as follows from RecordView and ListView.



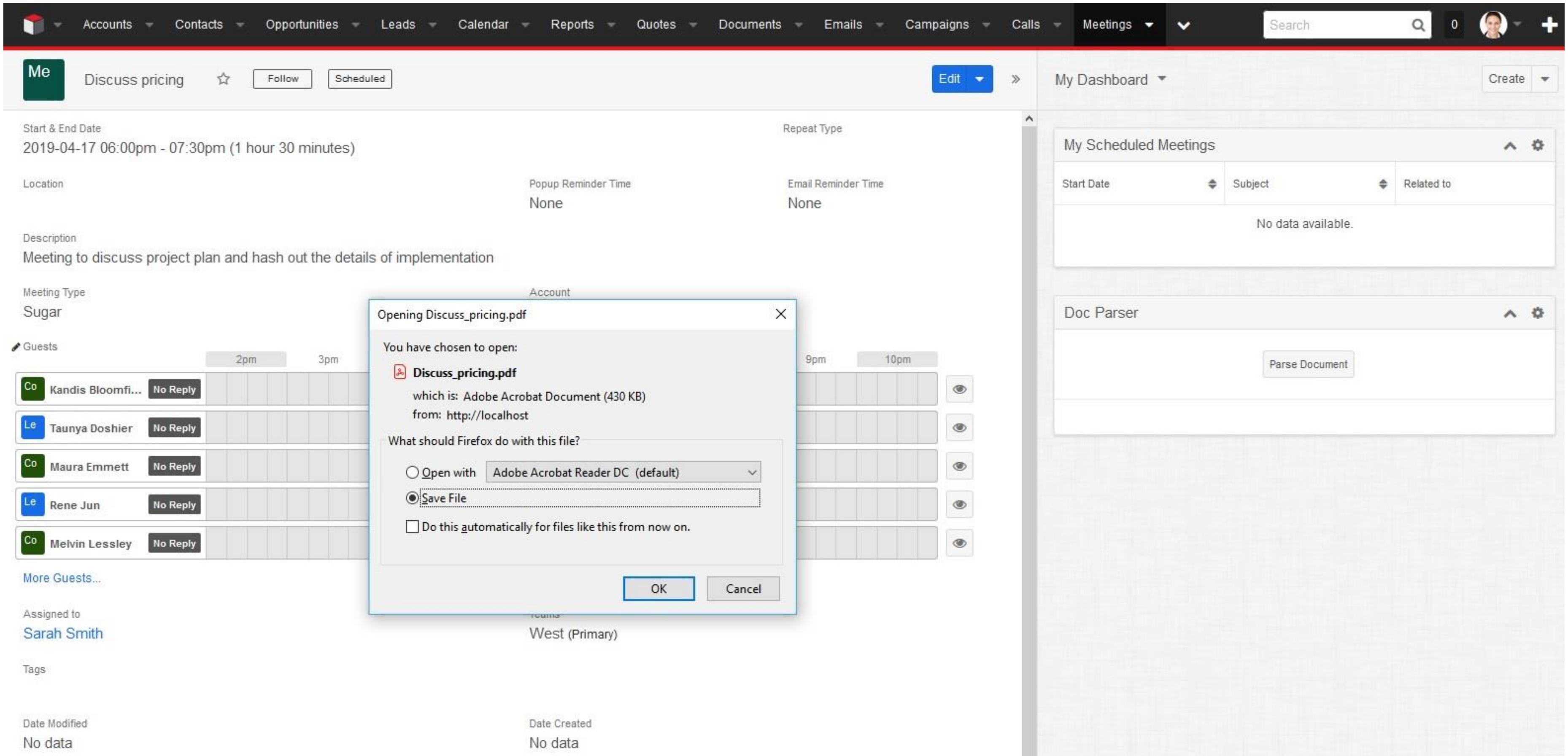
- Once user select “Doc Parser” from dashlet ListView then it will be added into Dashboard section as follows.



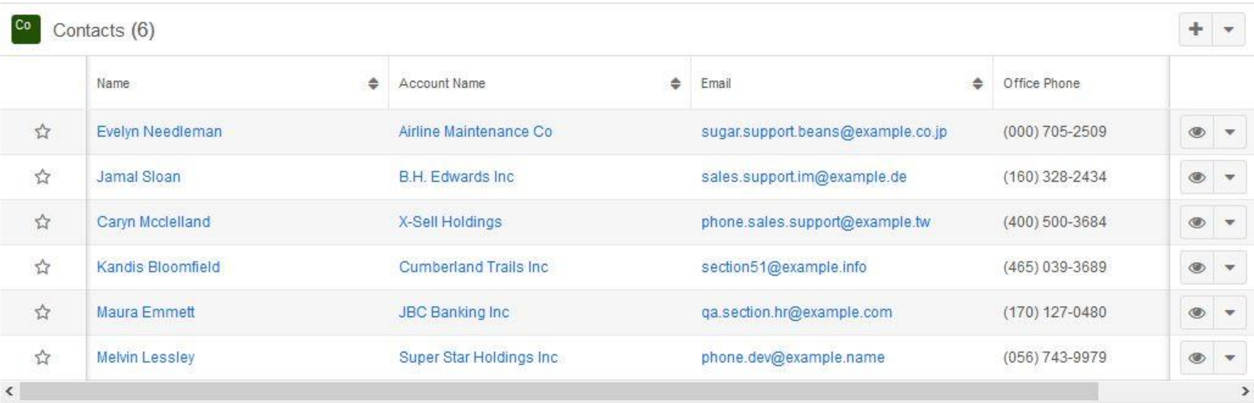
- When user clicks on Parse Document, a popup will be open. A user can able to generate the PDF or WordDoc from there. Popup will display all the templates created for base module. Each template record has dropdown button for generate WordDoc/PDF file and download it. If base module has relationship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



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



- 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.



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	

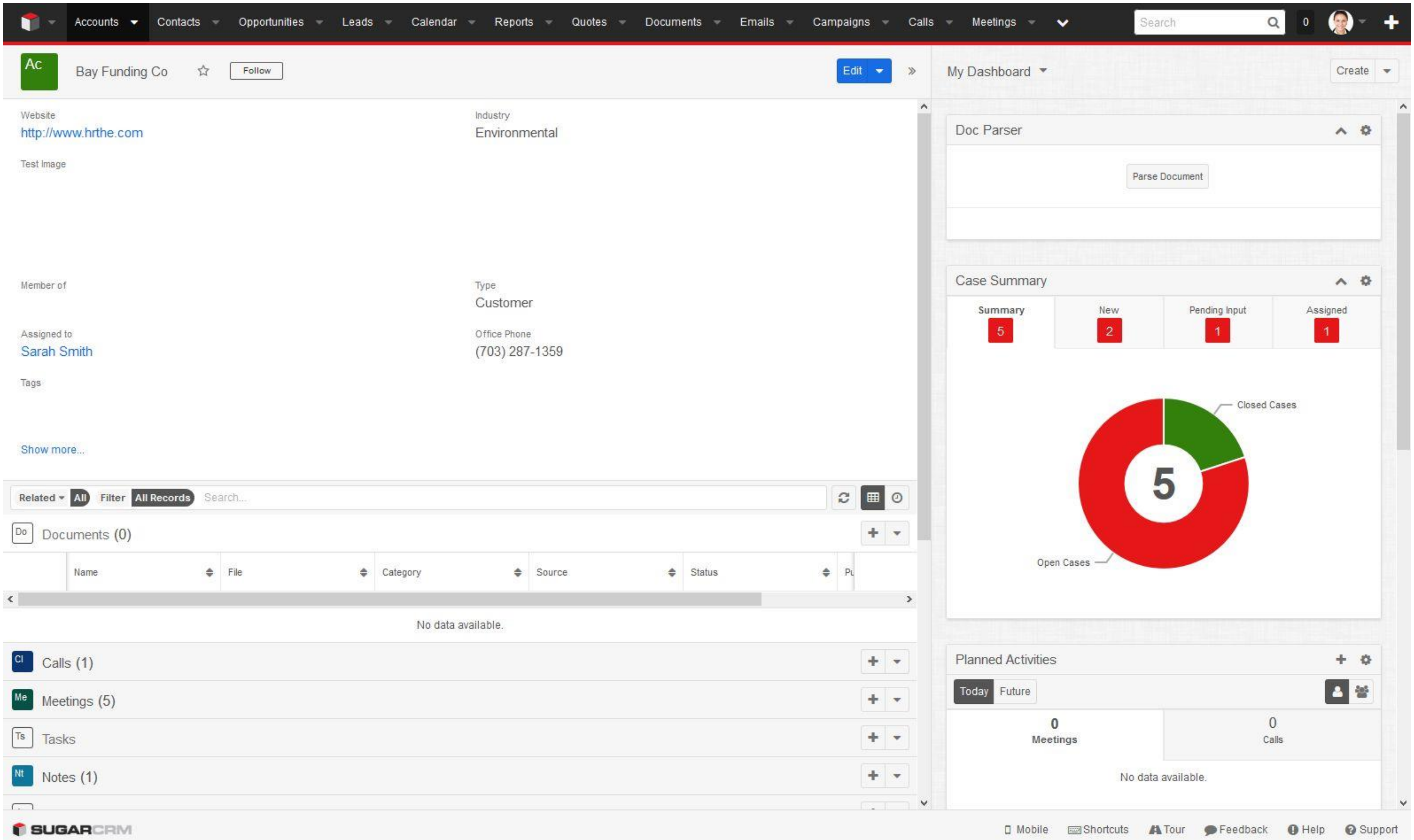
Users

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

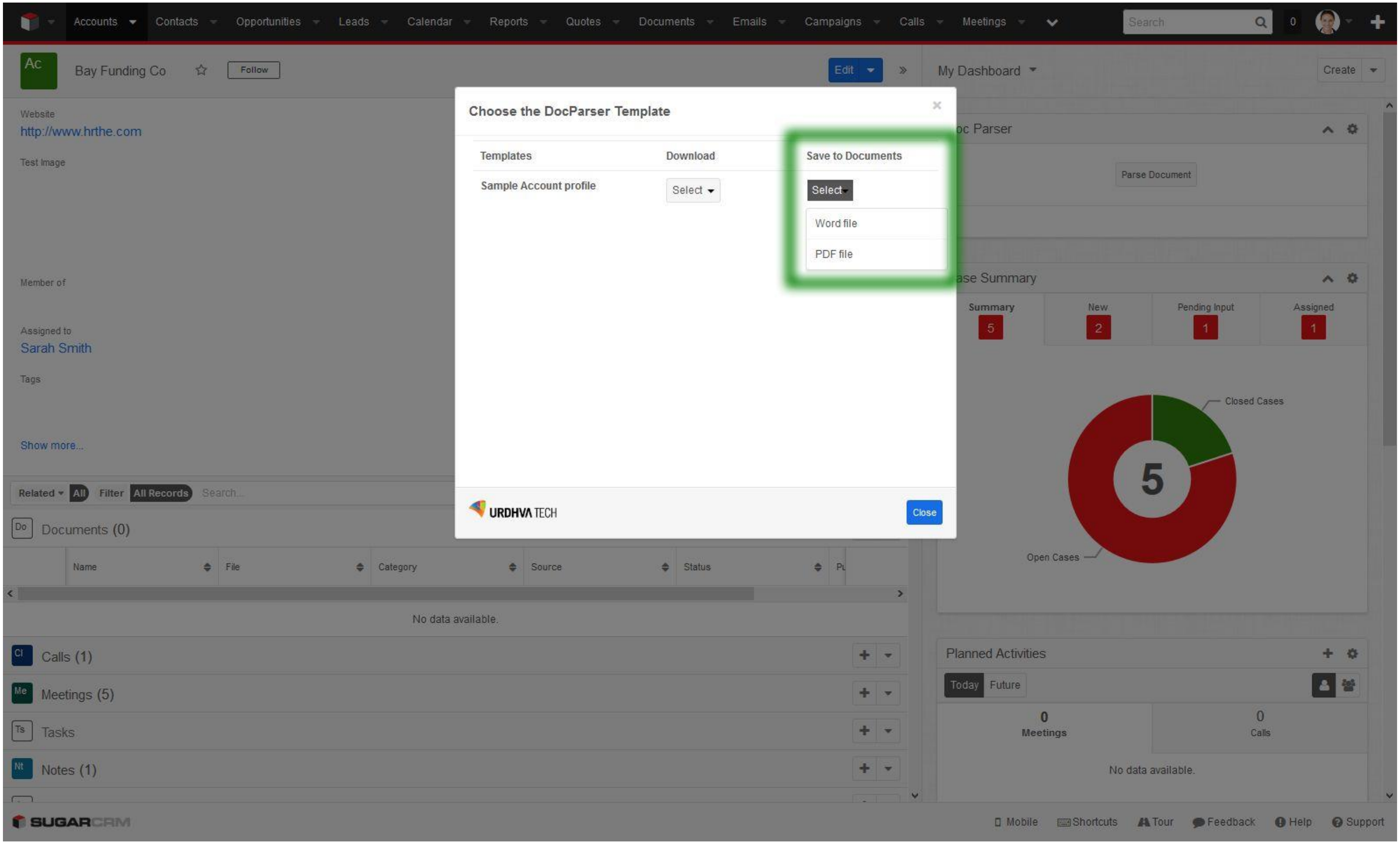
Leads

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	

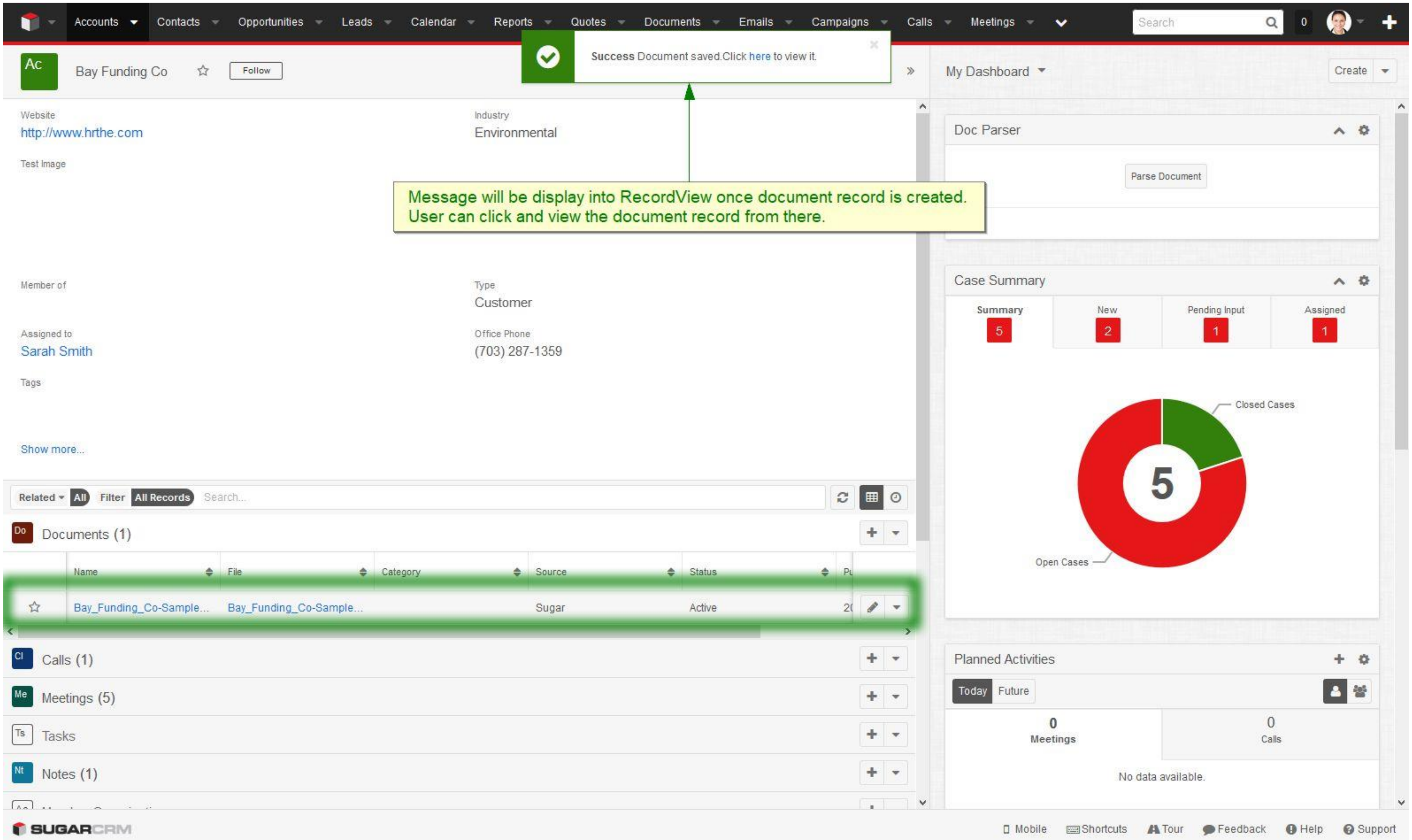
- In the previous example, Meetings module doesn't have any relationship with the SugarCRM's Documents module. So DocParser doesn't allow to relate WordDoc/PDF directly to Documents module.
- Let's check with Accounts module which has a relationship with the Documents module. So we can relate the doc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



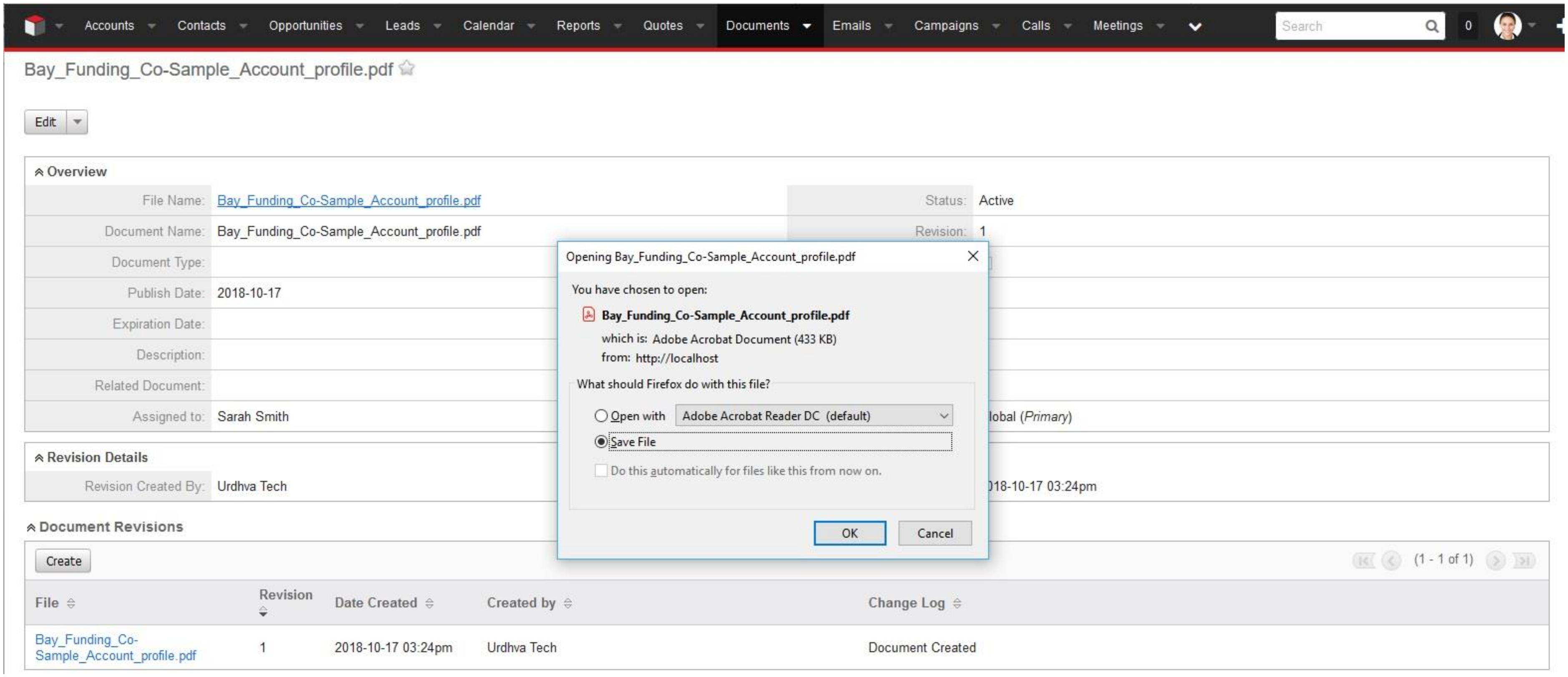
➢ While clicked on the "Parse Document" button popup will be open as follows with the "Save to Documents" column.



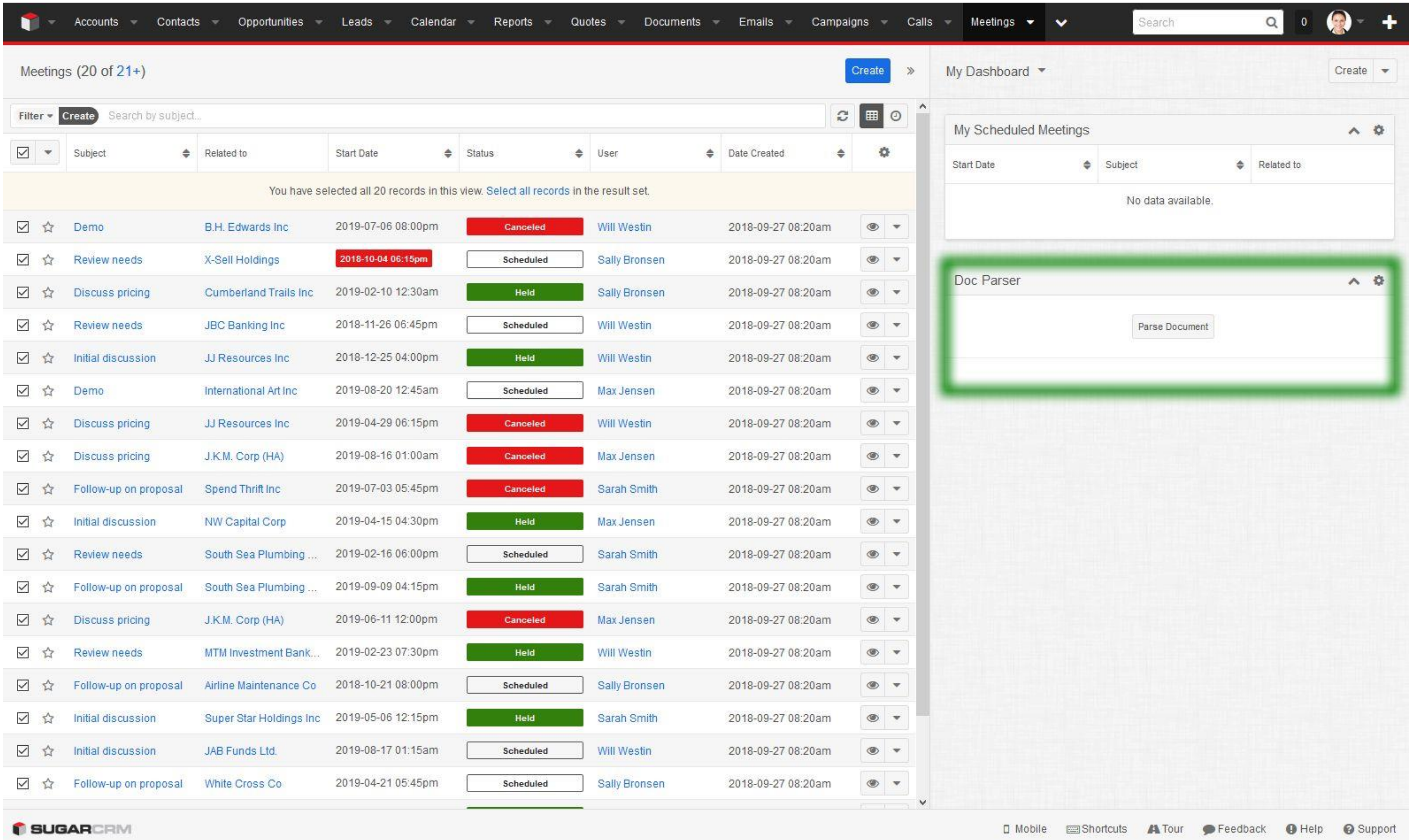
- Once user clicked on the Word file/PDF file then Document record will be created and relate with the Account module as follows.



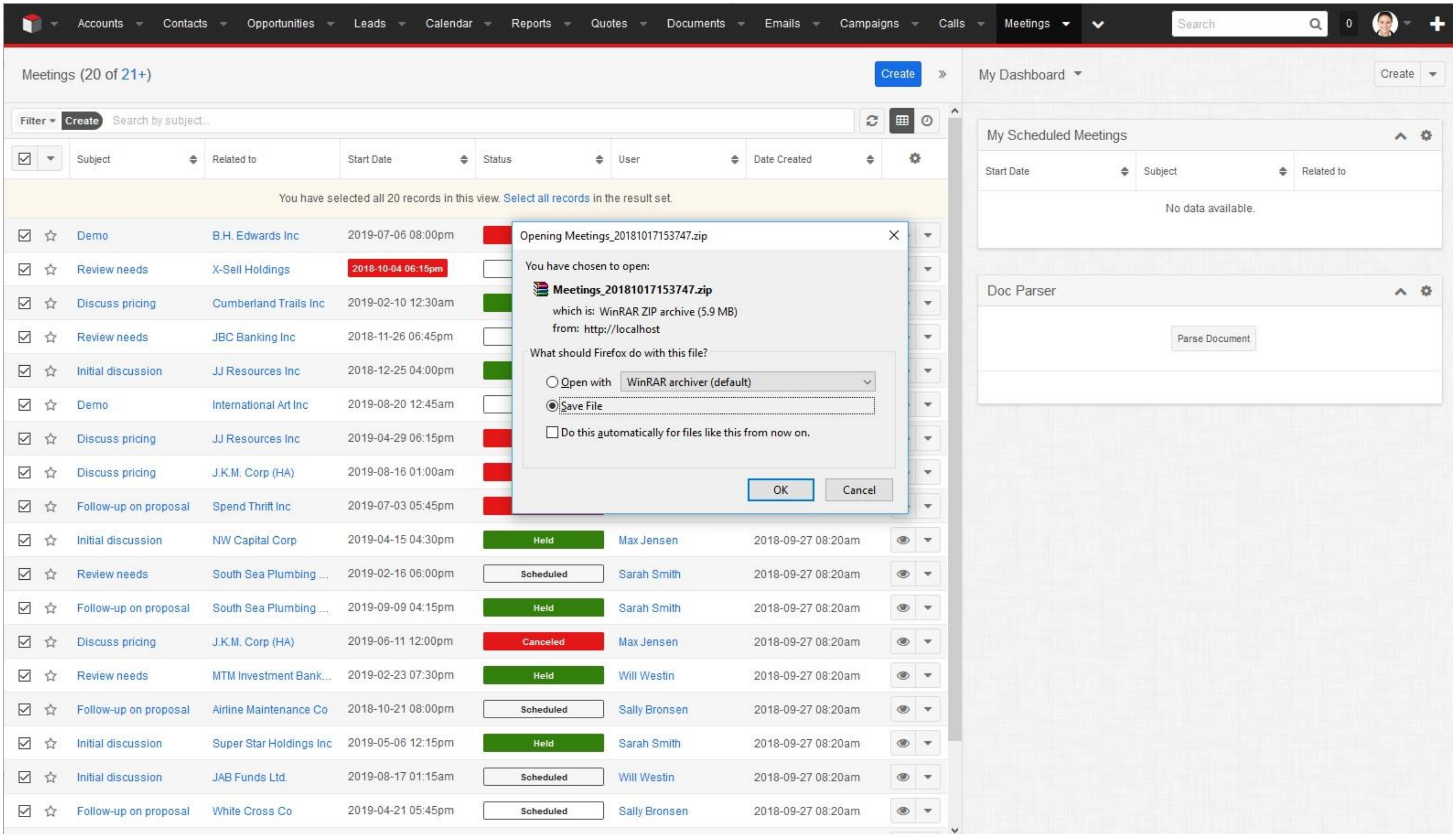
➢ Let's open the document record and download the PDF file from there.



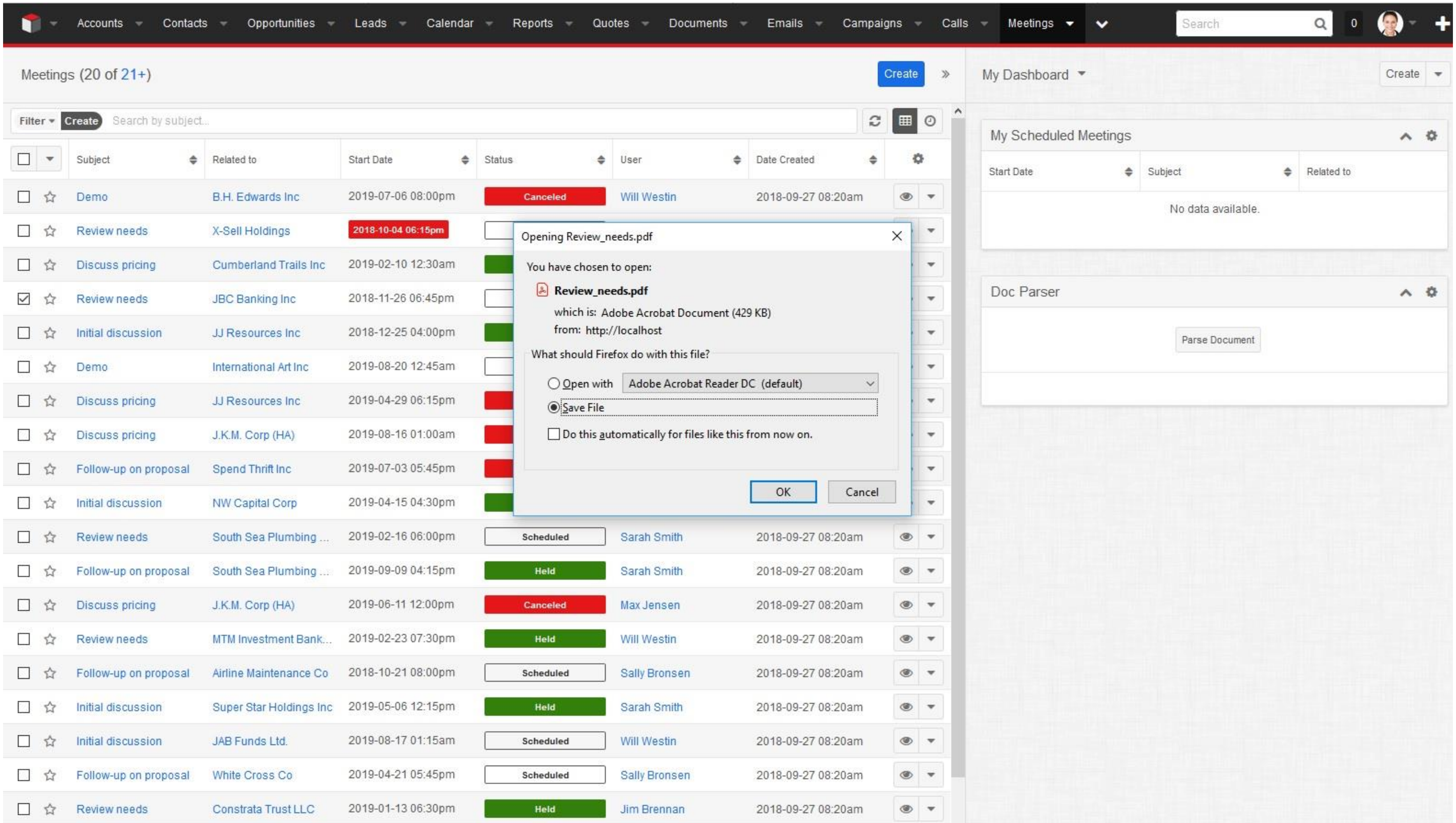
- DocParser allow to generate the document from ListView also as follows.



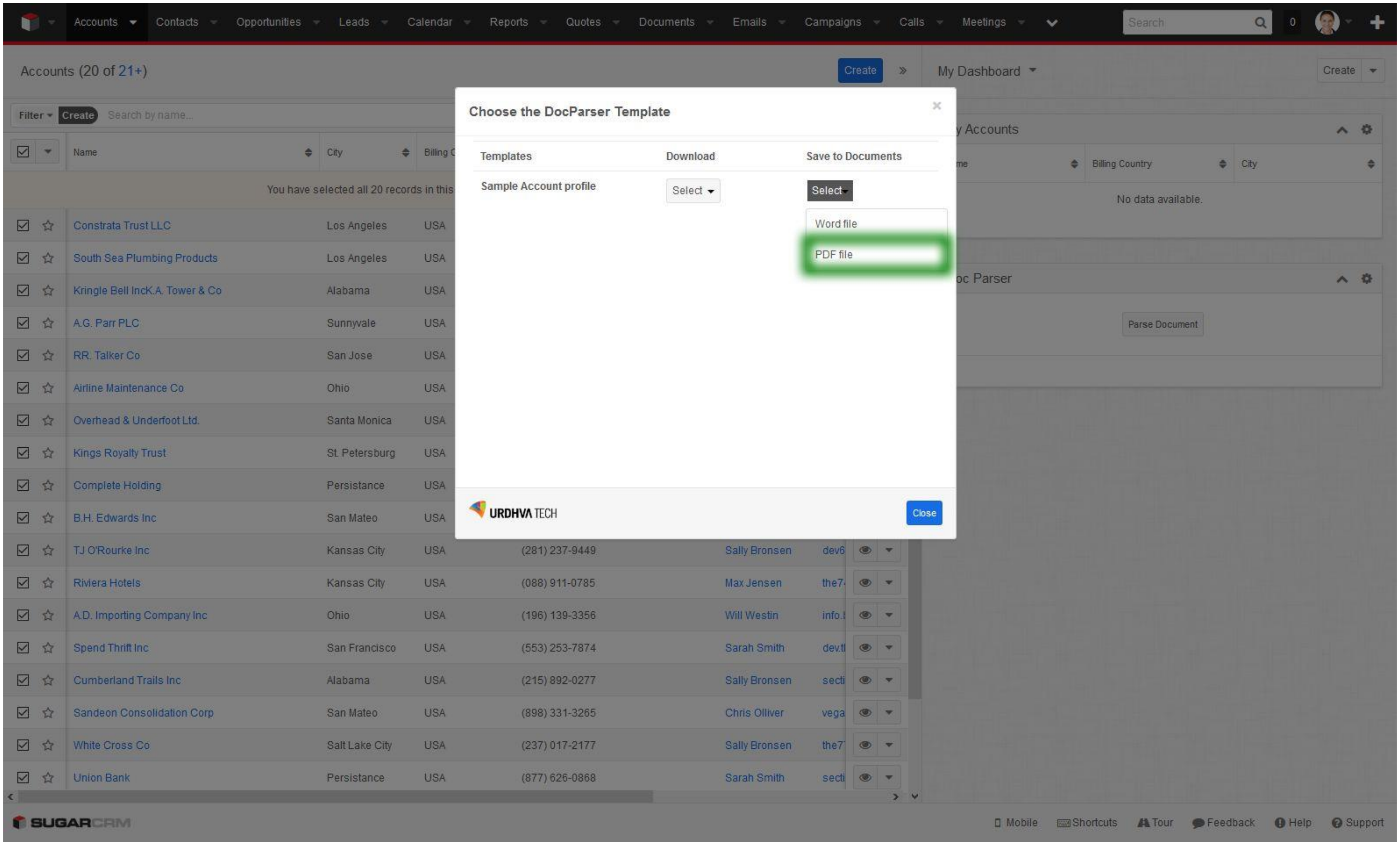
➢ If a user has selected more than one record into ListView then DocParser will create zip file and allow a user to download it. Zip will include all the records with the filename as RECORDNAME_DATE("YMDHIS).pdf/.doc



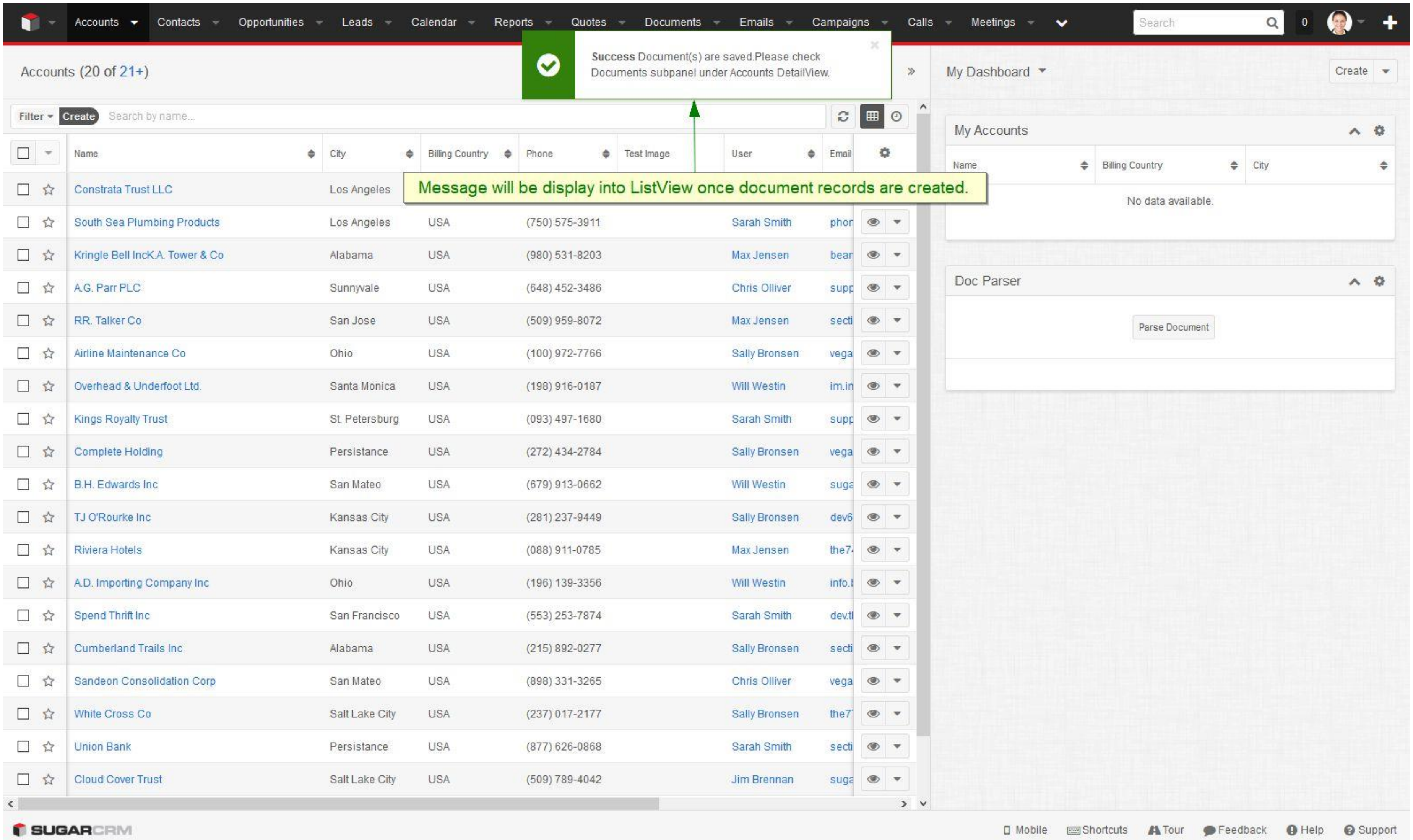
➢ If user has selected only single record into ListView then DocParser allow to download individual WordDoc/PDF file.



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



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



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