



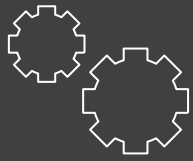
**Doc Parser**



**URDHVA TECH**

**Version 1.0**





## 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

Continue

Validate

✓ Success!

# 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.

Sample Meeting with attendees » Edit

Save Cancel View Change Log

Save and Continue (3 of 4) \* Indicates required field

Name: \*

Base Module: \*

Field Selection:

Choose relational data:

Template Body:

Sample Meeting with attendees

Meetings

Subject

Insert field

Choose relationship data

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

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.

The screenshot displays a CRM application interface. At the top, a navigation bar includes tabs for Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, Documents, Emails, and Doc Parser. A search bar and a user profile icon are also present. The main header shows the title "Sample Meeting with attendees" and an "Edit" link. Below the header, there are buttons for "Save", "Cancel", "View Change Log", and "Save and Continue". A progress indicator shows "(1 of 4)".

The form fields include:

- Name: \* (Sample Meeting with attendees)
- Base Module: \* (Meetings)
- Field Selection:
- Choose relational data: (Choose relationship data)
- Template Body:

A popup titled "Select related module" is open, showing a list of modules: Notes, Contacts, Leads, and Users. The popup also features the URDHVA TECH logo and a "Close" button.

The bottom section of the form is labeled "Invitees".

- 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' popup window for the 'Contacts' module. The window is divided into two main sections: 'Available fields' and 'Selected fields'. The 'Available fields' section lists various fields including Date Created, Date Modified, Modified By, Created By, Description, Facebook Account, Twitter Account, and Google Plus ID. The 'Selected fields' section shows the fields Name, Title, Mobile, and Email. Below these sections, there are several configuration options: 'Set Record Limit' (set to 2), 'Add Blank Column' (with a 'Remark' input field and an 'Insert' button), 'Order By Field' (set to Name) and 'Descending' (set to Descending), 'Add Sequence No' (set to Yes), 'Select Theme' (set to Red), and 'Add Table' / 'Remove Table' buttons. The background of the application shows a navigation menu with options like Leads, Calendar, Reports, Quotes, Documents, Emails, Campaigns, and Doc Parser, along with a search bar and a user profile icon.

**Contacts**

Available fields

- Date Created
- Date Modified:
- Modified By:
- Created By
- Description:
- Facebook Account
- Twitter Account
- Google Plus ID

Selected fields

- Name
- Title
- Mobile
- Email

Set Record Limit: 2

Add Blank Column: Remark [Insert]

Order By Field: Name Descending

Add Sequence No: Yes

Select Theme: Red

Add Table Remove Table

Leads

URDHVA TECH

Close

Annotations:

- Set the limit on fetching the relationship records.
- Allow option to add a blank column which will display along with the related records.
- Set the order by field. Relationship records will be sorted based on the selected field and order.
- 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.
- Allow option to apply the predefined format on the related records table.

- ❖ 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.

The screenshot shows a web application interface with a top navigation bar containing menu items: Leads, Calendar, Reports, Quotes, Documents, Emails, Campaigns, and Doc Parser. A search bar is located on the right of the navigation bar. The main content area displays a modal window titled "Select related module".

Inside the modal, the "Contacts" module is selected. It features two columns of fields:

- Available fields:** Date Created, Date Modified, Modified By, Created By, Description, Facebook Account, Twitter Account, Google Plus ID.
- Selected fields:** Name, Title, Mobile, Email, Remark.

The "Remark" field in the "Selected fields" column is highlighted with a green box, and a yellow callout bubble points to it with the text "Added as column."

Below the field lists, there are several configuration options:

- Set Record Limit:** A dropdown menu showing the value "2".
- Add Blank Column:** A button next to an empty text input field and an "Insert" button.
- Order By Field:** A dropdown menu showing "Name" and a "Descending" dropdown.
- Add Sequence No:** A dropdown menu showing "Yes".
- Select Theme:** A dropdown menu showing "Red".
- Add Table / Remove Table:** Two buttons at the bottom left.

The modal has a "Close" button at the bottom right corner.



- ❖ **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.

**Name:** \* Sample Meeting with attendees Assigned to: Urdhva Tech

**Base Module:** \* Meetings

**Field Selection:**

**Choose relational data:** Choose relationship data

**Template Body:**

HTML | B I U ABC | [List Icons] | Styles | Heading 1 | Font Family | Font Size

[Rich Text Editor Icons]

```

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

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.

**Sample Meeting with attendees » Edit**

Name: \*  Assigned to:

Base Module: \*

Field Selection:

Choose relational data:

Template Body:

HTML B I U ABC Styles Font Family

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

\$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

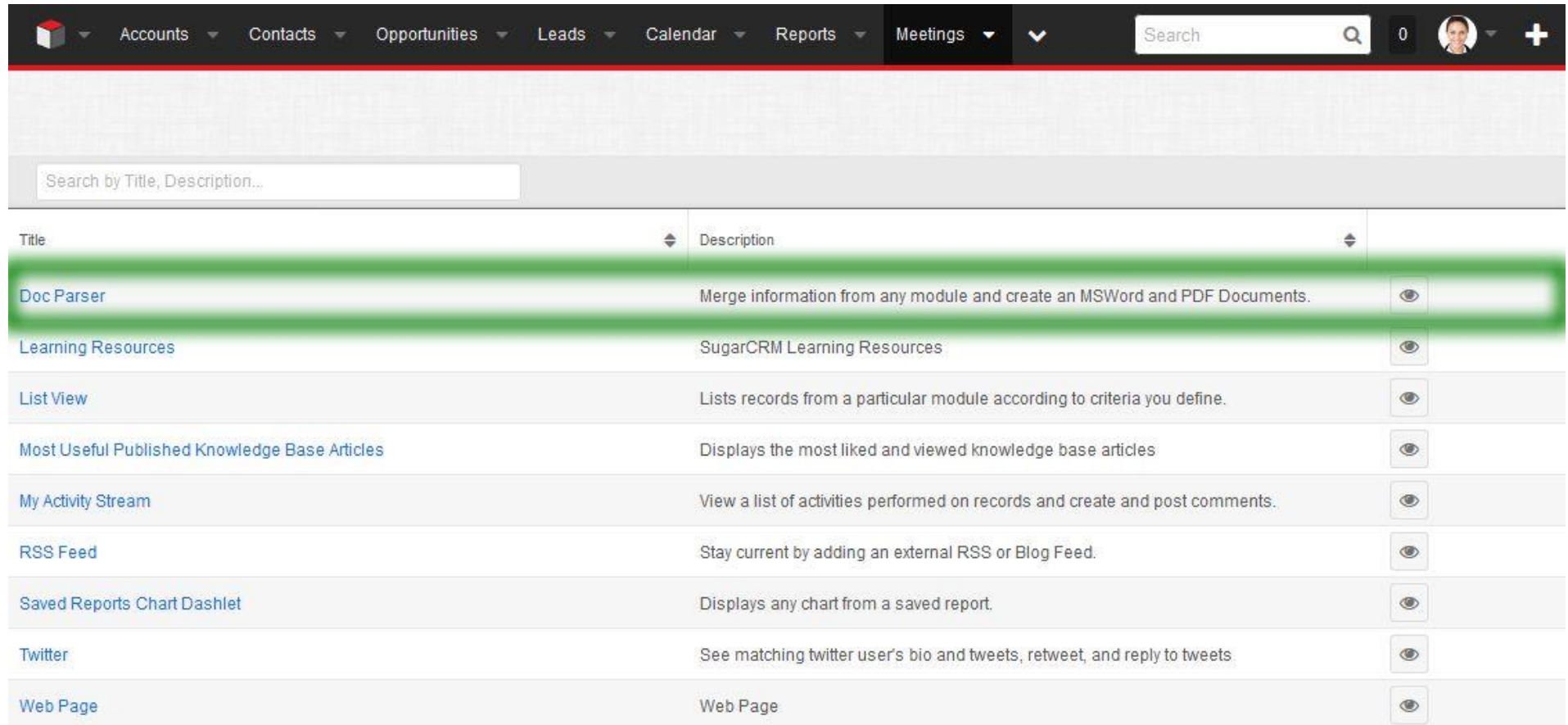
Name	Title	Department	Mobile	Email
full_name	title	department	phone_mobile	email

\$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.



Title	Description	
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 user 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 present.

The main content area is divided into two sections. The left section shows the details of a meeting titled "Discuss pricing". Key information includes the start and end date (2019-04-17 06:00pm - 07:30pm), location, description, meeting type (Sugar), assigned to (Sarah Smith), account (Super Star Holdings Inc), and teams (West (Primary)).

The right section, titled "My Dashboard", contains two dashlets. The top dashlet, "My Scheduled Meetings", shows a table with columns for Start Date, Subject, and Related to, but indicates "No data available". The bottom dashlet, "Doc Parser", 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 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. The top navigation bar includes modules like Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, Documents, Emails, Campaigns, Calls, and Meetings. A search bar and user profile are on the right. The main content area shows a meeting detail for 'Discuss pricing' on 2019-04-17 from 06:00pm to 07:30pm. The meeting description is 'Meeting to discuss project plan and hash out the details of implementation'. The meeting type is 'Sugar'. A list of guests is shown with their names and 'No Reply' status. The meeting is assigned to Sarah Smith. A 'Parse Document' button is visible in the background. A modal popup titled 'Choose the DocParser Template' is open in the center. It has three tabs: 'Templates', 'Download', and 'Save to Documents'. Under the 'Download' tab, there is a 'Select' dropdown menu with options for 'Word file' and 'PDF file'. The popup also features the URDHVA TECH logo and a 'Close' button.

**Choose the DocParser Template**

Templates	Download	Save to Documents
Sample Meeting with attendees	Select Word file PDF file	

URDHVA TECH

Close

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

The screenshot displays a CRM application 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 on the right. The main content area shows details for a meeting titled 'Discuss pricing', scheduled for 2019-04-17 from 06:00pm to 07:30pm. The meeting description is 'Meeting to discuss project plan and hash out the details of implementation'. A list of guests is shown, including Kandis Bloomfi..., Taunya Doshier, Maura Emmett, Rene Jun, and Melvin Lessley. A sidebar on the right contains 'My Scheduled Meetings' (showing 'No data available.') and a 'Doc Parser' section with a 'Parse Document' button. A Firefox dialog box titled 'Opening Discuss\_pricing.pdf' is overlaid in the center, asking the user to choose how to handle the file. The dialog shows the file is an Adobe Acrobat Document (430 KB) from http://localhost. The options are 'Open with Adobe Acrobat Reader DC (default)', 'Save File' (selected), and 'Do this automatically for files like this from now on.'.

Me Discuss pricing ☆ Follow Scheduled Edit » My Dashboard Create

Start & End Date  
2019-04-17 06:00pm - 07:30pm (1 hour 30 minutes)

Location  
None

Repeat Type  
None

Popup Reminder Time  
None

Email Reminder Time  
None

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

Meeting Type  
Sugar

Account

Guests

2pm 3pm 9pm 10pm

Co Kandis Bloomfi... No Reply

Le Taunya Doshier No Reply

Co Maura Emmett No Reply

Le Rene Jun No Reply

Co Melvin Lessley No Reply

More Guests...

Assigned to  
Sarah Smith

Tags

Date Modified  
No data

Date Created  
No data

West (Primary)

Opening Discuss\_pricing.pdf

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.

OK Cancel

My Scheduled Meetings

Start Date Subject Related to

No data available.

Doc Parser

Parse Document



- 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 main content area shows an Account record for 'Bay Funding Co'. The record includes fields for Website (http://www.hrthe.com), Industry (Environmental), Type (Customer), and Office Phone ((703) 287-1359). The account is assigned to Sarah Smith. Below the record details is a table for 'Documents (0)' with columns for Name, File, Category, Source, Status, and Priority. The table is currently empty, showing 'No data available.'.

The sidebar on the right contains several modules and a dashboard. The 'Doc Parser' module is visible, with a 'Parse Document' button. Below it is the 'Case Summary' module, which displays a donut chart showing the status of cases. The chart has a red section for 'Open Cases' (5) and a green section for 'Closed Cases' (1). The total number of cases is 5. Below the chart is a table with the following data:

Summary	New	Pending Input	Assigned
5	2	1	1

The 'Planned Activities' module shows a table with columns for 'Today' and 'Future'. The 'Today' column shows 0 Meetings and the 'Future' column shows 0 Calls. The table is currently empty, showing 'No data available.'.

The bottom of the interface shows the SugarCRM logo and navigation links for Mobile, Shortcuts, Tour, Feedback, Help, and Support.

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

The screenshot displays the SugarCRM user interface. A modal window titled "Choose the DocParser Template" is centered on the screen. This modal has two tabs: "Templates" and "Download". Under the "Download" tab, there is a "Select" dropdown menu. A secondary dropdown menu, labeled "Save to Documents", is open from the "Select" menu, showing options for "Word file" and "PDF file". This secondary dropdown is highlighted with a green rectangular border. The background interface shows the account page for "Bay Funding Co" with various navigation tabs at the top. On the right, there is a "My Dashboard" section with a "Parse Document" button. Below this, a "Case Summary" section features a donut chart with a large number "5" in the center, representing "Open Cases". The chart is divided into "Open Cases" (red) and "Closed Cases" (green). Other summary boxes show counts for "New" (2), "Pending Input" (1), and "Assigned" (1). At the bottom, a "Planned Activities" section shows "0 Meetings" and "0 Calls" for today. The SugarCRM logo is visible in the bottom left corner, and a footer with links like "Mobile", "Shortcuts", "Tour", "Feedback", "Help", and "Support" is at the bottom right.

- 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. At the top, a navigation bar includes tabs for Accounts, Contacts, Opportunities, Leads, Calendar, Reports, Quotes, Documents, Emails, Campaigns, Calls, Meetings, and a search bar. A success message banner at the top center reads: "Success Document saved. Click [here](#) to view it." Below this, the main content area shows the record for "Bay Funding Co". The record details include: Website (http://www.hrthe.com), Industry (Environmental), Type (Customer), Office Phone ((703) 287-1359), and Assigned to (Sarah Smith). A yellow callout box points to the success message, stating: "Message will be display into RecordView once document record is created. User can click and view the document record from there." Below the record details, a table lists documents. The first document is highlighted with a green box:

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

On the right side, the "My Dashboard" is visible, featuring a "Doc Parser" section with a "Parse Document" button, a "Case Summary" section with a donut chart showing 5 Open Cases and 1 Closed Case, and a "Planned Activities" section showing 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 whether to open the PDF with Adobe Acrobat Reader DC or save it. The "Save File" option is selected. Below the dialog, the "Document Revisions" table shows one revision created by Urdhva Tech on 2018-10-17 at 03:24pm.

**Bay\_Funding\_Co-Sample\_Account\_profile.pdf** ☆

Edit ▾

**Overview**

File Name:	<a href="#">Bay_Funding_Co-Sample_Account_profile.pdf</a>	Status:	Active
Document Name:	Bay_Funding_Co-Sample_Account_profile.pdf	Revision:	1
Document Type:			
Publish Date:	2018-10-17		
Expiration Date:			
Description:			
Related Document:			
Assigned to:	Sarah Smith		

**Revision Details**

Revision Created By: Urdhva Tech

**Document Revisions**

Create

File	Revision	Date Created	Created by	Change Log
<a href="#">Bay_Funding_Co-Sample_Account_profile.pdf</a>	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: 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 "Create" button. Below the title is a filter bar with a "Filter" dropdown and a "Create" button. The table below lists 20 meeting records, each with columns for checkboxes, Subject, Related to, Start Date, Status, User, and Date Created. A message states: "You have selected all 20 records in this view. Select all records in the result set." The sidebar on the right contains a "My Dashboard" section with a "Create" button and a "Doc Parser" widget. The "Doc Parser" widget is highlighted with a green border and contains a "Parse Document" button.

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

SUGARCRM

Mobile Shortcuts Tour Feedback Help Support



- 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 application 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 a user profile icon are also present. The main content area is titled 'Meetings (20 of 21+)' and features a table with columns for selection, subject, related entity, start date, status, user, and date created. A message indicates that all 20 records in the view are selected. A modal dialog box is open, showing the filename 'Meetings\_20181017153747.zip' and asking the user what they want to do with the file. The dialog offers options to 'Open with WinRAR archiver (default)', 'Save File' (which is selected), or 'Do this automatically for files like this from now on.' The right sidebar contains sections for 'My Scheduled Meetings' and 'Doc Parser'.

	Subject	Related to	Start Date	Status	User	Date Created
You have selected all 20 records in this view. <a href="#">Select all records</a> in the result set.						
<input checked="" type="checkbox"/>	Demo	B.H. Edwards Inc	2019-07-06 08:00pm			
<input checked="" type="checkbox"/>	Review needs	X-Sell Holdings	2018-10-04 06:15pm			
<input checked="" type="checkbox"/>	Discuss pricing	Cumberland Trails Inc	2019-02-10 12:30am			
<input checked="" type="checkbox"/>	Review needs	JBC Banking Inc	2018-11-26 06:45pm			
<input checked="" type="checkbox"/>	Initial discussion	JJ Resources Inc	2018-12-25 04:00pm			
<input checked="" type="checkbox"/>	Demo	International Art Inc	2019-08-20 12:45am			
<input checked="" type="checkbox"/>	Discuss pricing	JJ Resources Inc	2019-04-29 06:15pm			
<input checked="" type="checkbox"/>	Discuss pricing	J.K.M. Corp (HA)	2019-08-16 01:00am			
<input checked="" type="checkbox"/>	Follow-up on proposal	Spend Thrift Inc	2019-07-03 05:45pm			
<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 user has selected only single record into ListView then DocParser allow to download individual WordDoc/PDF file.

The screenshot displays a CRM application 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 on the right. The main content area is titled 'Meetings (20 of 21+)' and features a table with columns: Subject, Related to, Start Date, Status, User, and Date Created. A 'Create' button is visible. A modal dialog titled 'Opening Review\_needs.pdf' is open, showing options to 'Open with' (Adobe Acrobat Reader DC) or 'Save File'. The right sidebar contains 'My Dashboard' and 'My Scheduled Meetings' sections, with a 'Doc Parser' section at the bottom featuring a 'Parse Document' button.

	Subject	Related to	Start Date	Status	User	Date Created
<input type="checkbox"/>	Demo	B.H. Edwards Inc	2019-07-06 08:00pm	Canceled	Will Westin	2018-09-27 08:20am
<input type="checkbox"/>	Review needs	X-Sell Holdings	2018-10-04 06:15pm			
<input type="checkbox"/>	Discuss pricing	Cumberland Trails Inc	2019-02-10 12:30am			
<input checked="" type="checkbox"/>	Review needs	JBC Banking Inc	2018-11-26 06:45pm			
<input type="checkbox"/>	Initial discussion	JJ Resources Inc	2018-12-25 04:00pm			
<input type="checkbox"/>	Demo	International Art Inc	2019-08-20 12:45am			
<input type="checkbox"/>	Discuss pricing	JJ Resources Inc	2019-04-29 06:15pm			
<input type="checkbox"/>	Discuss pricing	J.K.M. Corp (HA)	2019-08-16 01:00am			
<input type="checkbox"/>	Follow-up on proposal	Spend Thrift Inc	2019-07-03 05:45pm			
<input type="checkbox"/>	Initial discussion	NW Capital Corp	2019-04-15 04:30pm			
<input type="checkbox"/>	Review needs	South Sea Plumbing ...	2019-02-16 06:00pm	Scheduled	Sarah Smith	2018-09-27 08:20am
<input type="checkbox"/>	Follow-up on proposal	South Sea Plumbing ...	2019-09-09 04:15pm	Held	Sarah Smith	2018-09-27 08:20am
<input type="checkbox"/>	Discuss pricing	J.K.M. Corp (HA)	2019-06-11 12:00pm	Canceled	Max Jensen	2018-09-27 08:20am
<input type="checkbox"/>	Review needs	MTM Investment Bank...	2019-02-23 07:30pm	Held	Will Westin	2018-09-27 08:20am
<input type="checkbox"/>	Follow-up on proposal	Airline Maintenance Co	2018-10-21 08:00pm	Scheduled	Sally Bronsen	2018-09-27 08:20am
<input type="checkbox"/>	Initial discussion	Super Star Holdings Inc	2019-05-06 12:15pm	Held	Sarah Smith	2018-09-27 08:20am
<input type="checkbox"/>	Initial discussion	JAB Funds Ltd.	2019-08-17 01:15am	Scheduled	Will Westin	2018-09-27 08:20am
<input type="checkbox"/>	Follow-up on proposal	White Cross Co	2019-04-21 05:45pm	Scheduled	Sally Bronsen	2018-09-27 08:20am
<input type="checkbox"/>	Review needs	Constrata 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 window titled "Choose the DocParser Template". The modal has three tabs: "Templates", "Download", and "Save to Documents". Under the "Templates" tab, there is a table with one row: "Sample Account profile". To the right of this row are two dropdown menus. The first dropdown, labeled "Download", shows "Select". The second dropdown, labeled "Save to Documents", shows "Word file" and "PDF file", with "PDF file" highlighted by a green rectangle. The background shows a list view of accounts with columns for Name, City, and Billing Country. The SugarCRM logo is visible in the bottom left corner, and the bottom right corner contains links for Mobile, Shortcuts, Tour, Feedback, Help, and Support.

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



- 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, Meetings, and a search bar. A success message is shown in a green box: "Success Document(s) are saved. Please check Documents subpanel under Accounts DetailView." Below this, a table lists 20 accounts. A yellow callout box points to the table with the text: "Message will be display into ListView once document records are created." The table has columns for Name, City, Billing Country, Phone, Test Image, User, and Email. The right sidebar contains a "My Dashboard" section with a "Create" button and a "My Accounts" section with a "No data available" message. Below that is a "Doc Parser" section with a "Parse Document" button. The footer includes the SugarCRM logo and links for Mobile, Shortcuts, Tour, Feedback, Help, and Support.

Name	City	Billing Country	Phone	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.1
Spend Thrift Inc	San Francisco	USA	(553) 253-7874	Sarah Smith	dev1
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



**URDHVA TECH**

## CONTACT US



[CONTACT@URDHVA-TECH.COM](mailto:CONTACT@URDHVA-TECH.COM)



[URDHVATECH](https://www.skype.com/people/URDHVATECH)



[@URDHVATECH](https://twitter.com/URDHVATECH)