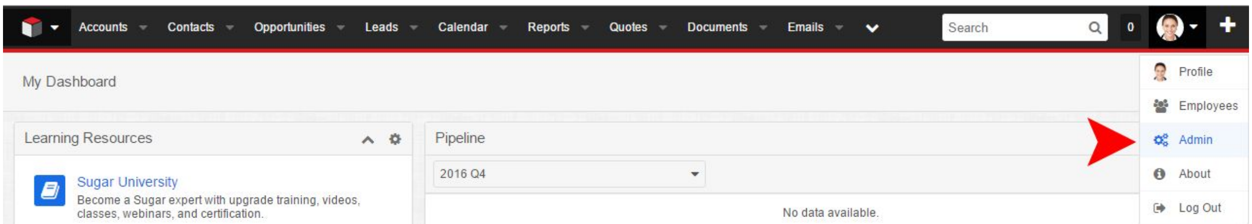
Google Sheets Business Intelligence Admin Guide

Configuring License and Validation Key

Step #1:

Go to the “Admin” module, selected from the drop-down menu as indicated in the image below.

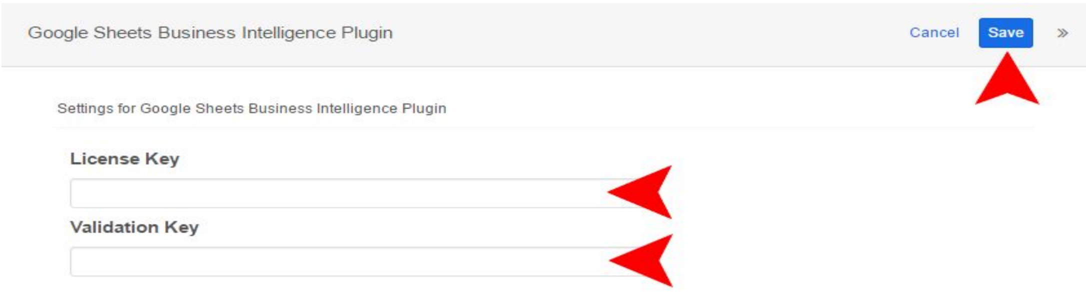


Step #2:

In the "Admin" options, click on the “Google Sheets Business Intelligence Settings” section, then select “License & Validation.”

Step #3:

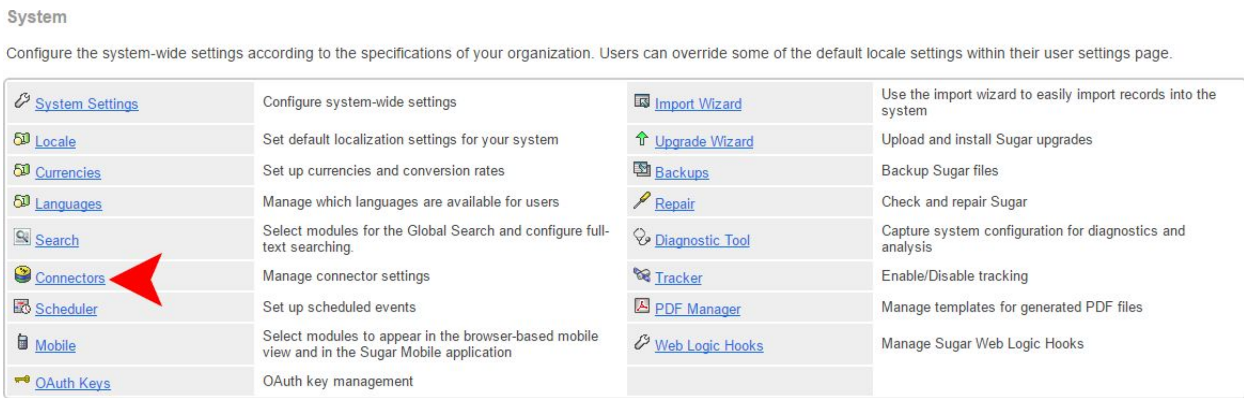
Enter provided “License Key” and “Validation Key,” then click “Save.” If you don’t have License and Validation Key, or your key has expired contact, us at support@intelestream.net.



Setting up the Google Reports Connector

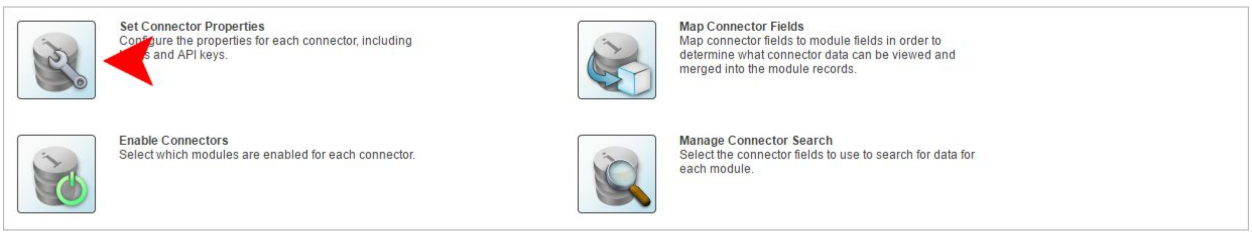
Step #1:

In “Admin” Module, go to the “System Settings” section, and then select the “Connectors” option.



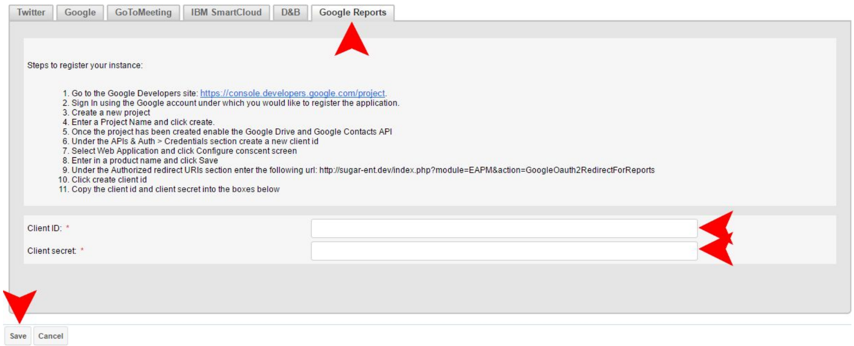
Step #2:

Click on “Set Connector Properties" icon.



Step #3:

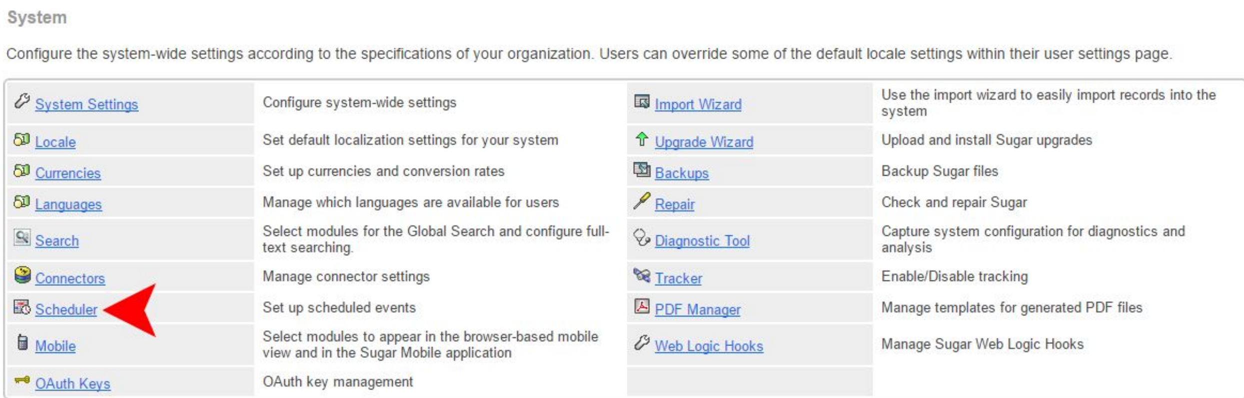
Select “Google Reports” tab, and then follow the step-by-step instructions. After you have created your “Google Project,” copy the provided “Client ID” and “Client Secret” codes into their respective fields, then click “Save.”



Setting up the Scheduler

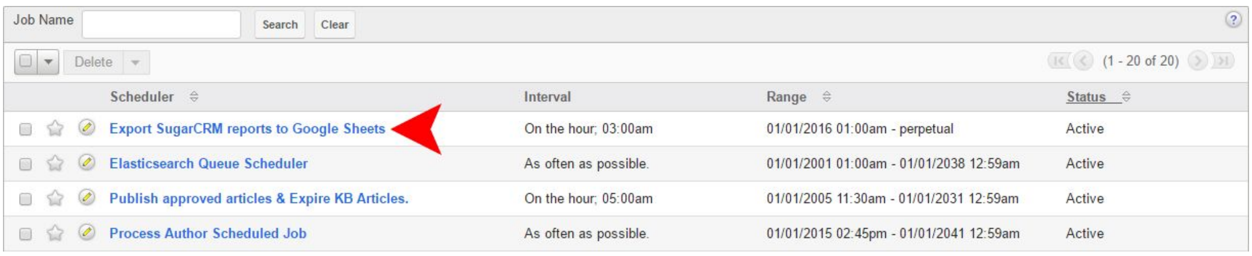
Step #1:

In “Admin” Module, go to the “System Settings” section, and then select the “Scheduler” option.



Step #2:

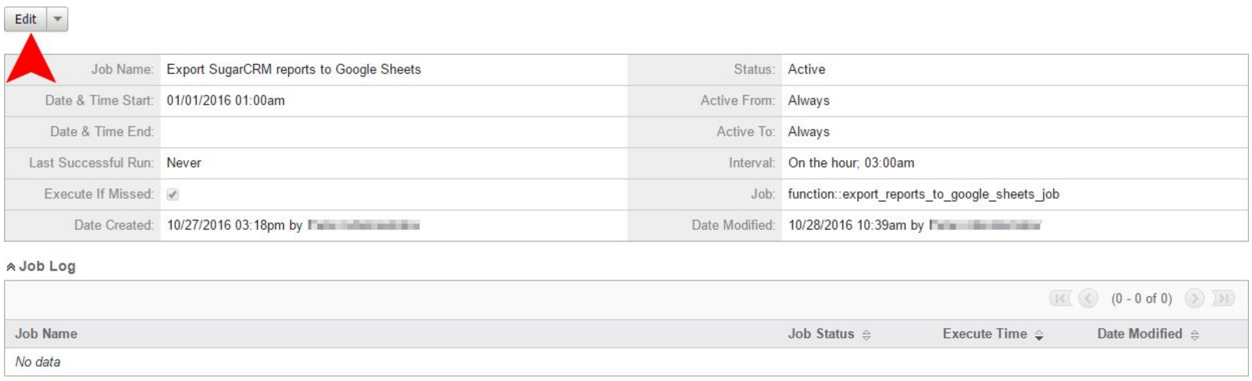
Select the “Export SugarCRM reports to Google Sheets” task.

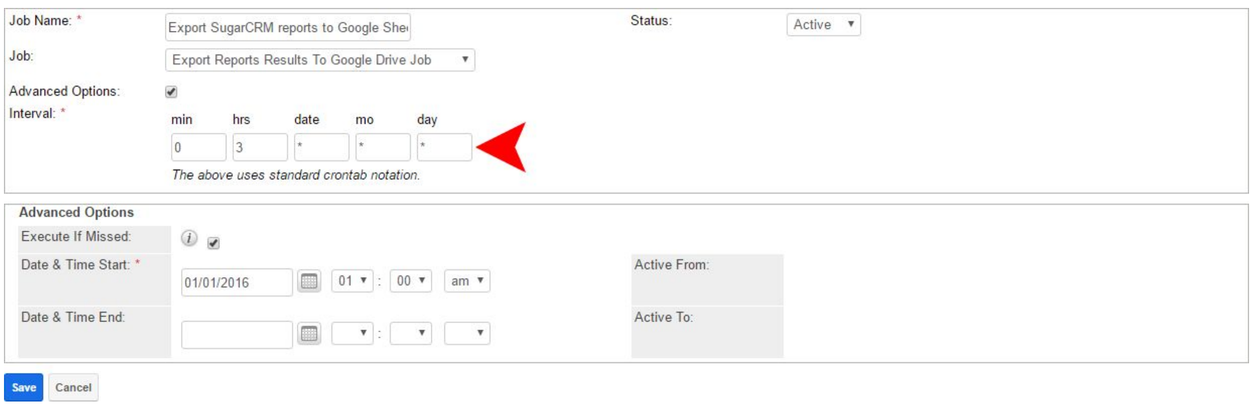


Step #3:

Click on “Edit,” then modify interval to suit your needs. After you are done, click “Save”

NOTE: Setting all interval fields to * will cause job to be run as often as possible. This can cause serious performance issues if system is under heavy load! To avoid this problem, we recommend limiting exports to once or twice per day.



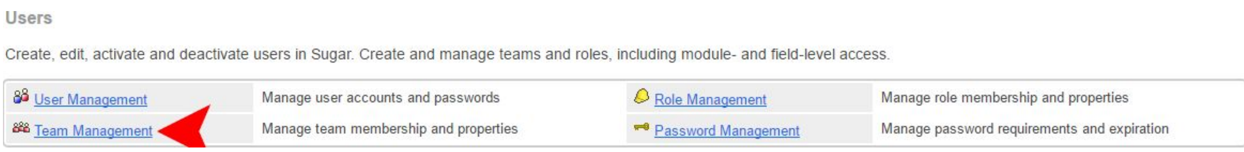


User Management

This option allows you to set up user to receive reports directly into their Google Drive.

Step #1:

In “Admin” Module, go to the “System Settings” section, and then select the “Team Management” option.



Step #2:

Select the “Google Sheets Business Intelligence” team option.

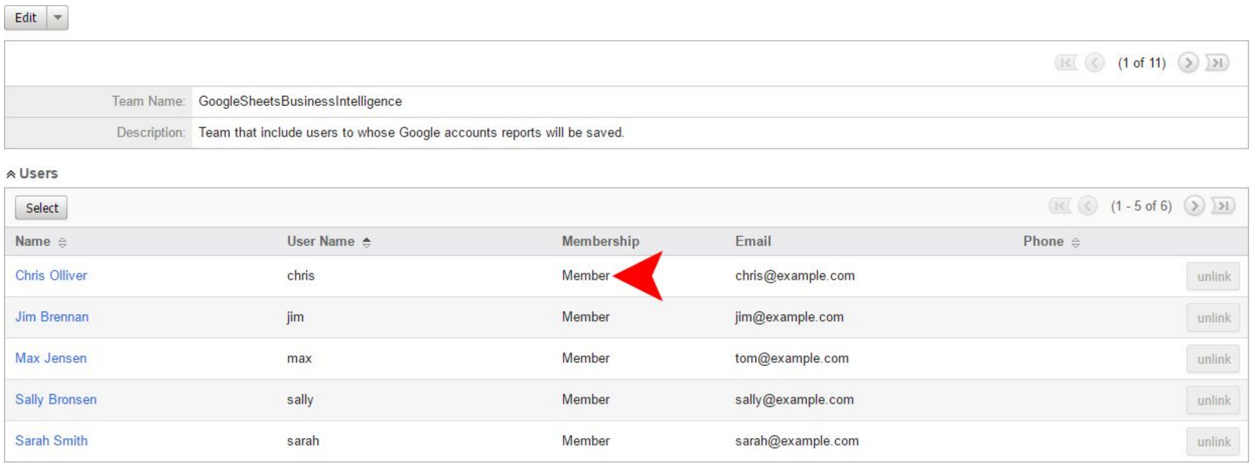
Step #3:

Click the “Select” button. From here, you will be presented with a list of users. Selected users will receive Reports to their Google Drive

Step #4:

After you have selected users, double check to make sure that their “Membership” type is “**Member.**” Users who do not have the correct membership type will not be able to receive reports

NOTE: Selected users need to have access to Reports module in order for this process to work.



Final Step

For these reports to export correctly from SugarCRM, they require a special naming convention. This is accomplished by adding the prefix "EXR2GD" to the report title.

For example, if you have report with name “Account List,” it will need to be renamed to “EXR2GD Account List” for the plugin to properly export it.