

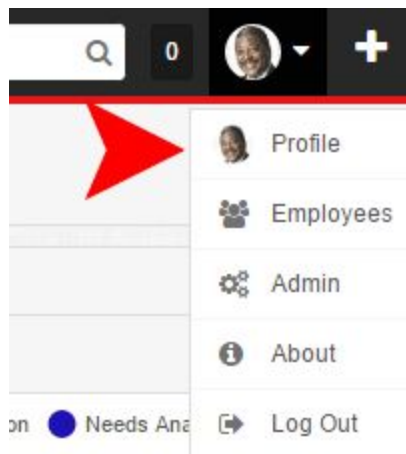
Google Sheets Business Intelligence Users Guide

Configuring External Account for use with the Google Sheets Business Intelligence

NOTE: These steps are the same for both admin and regular users.

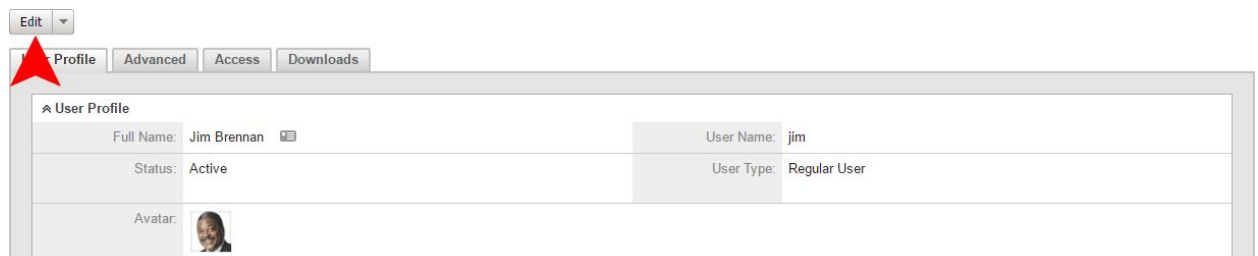
Step #1:

Click on your account image in the top right corner, then select “Profile” from the dropdown menu.



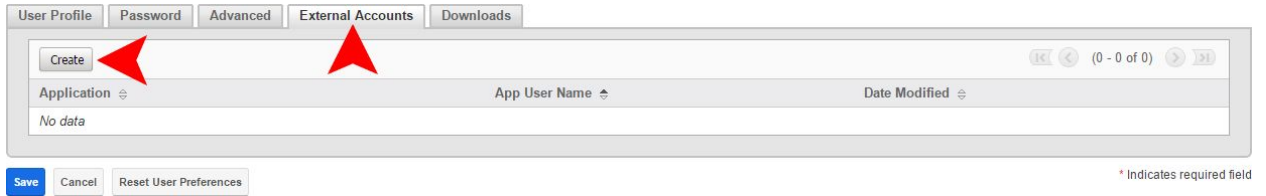
Step #2:

Click on “Edit” button.



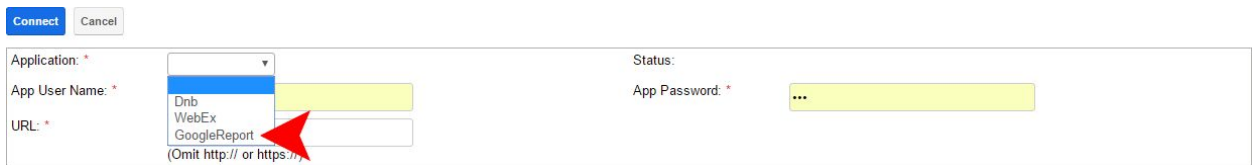
Step #3:

Select the “External Account” tab, then click the “Create” button.



Step #4:

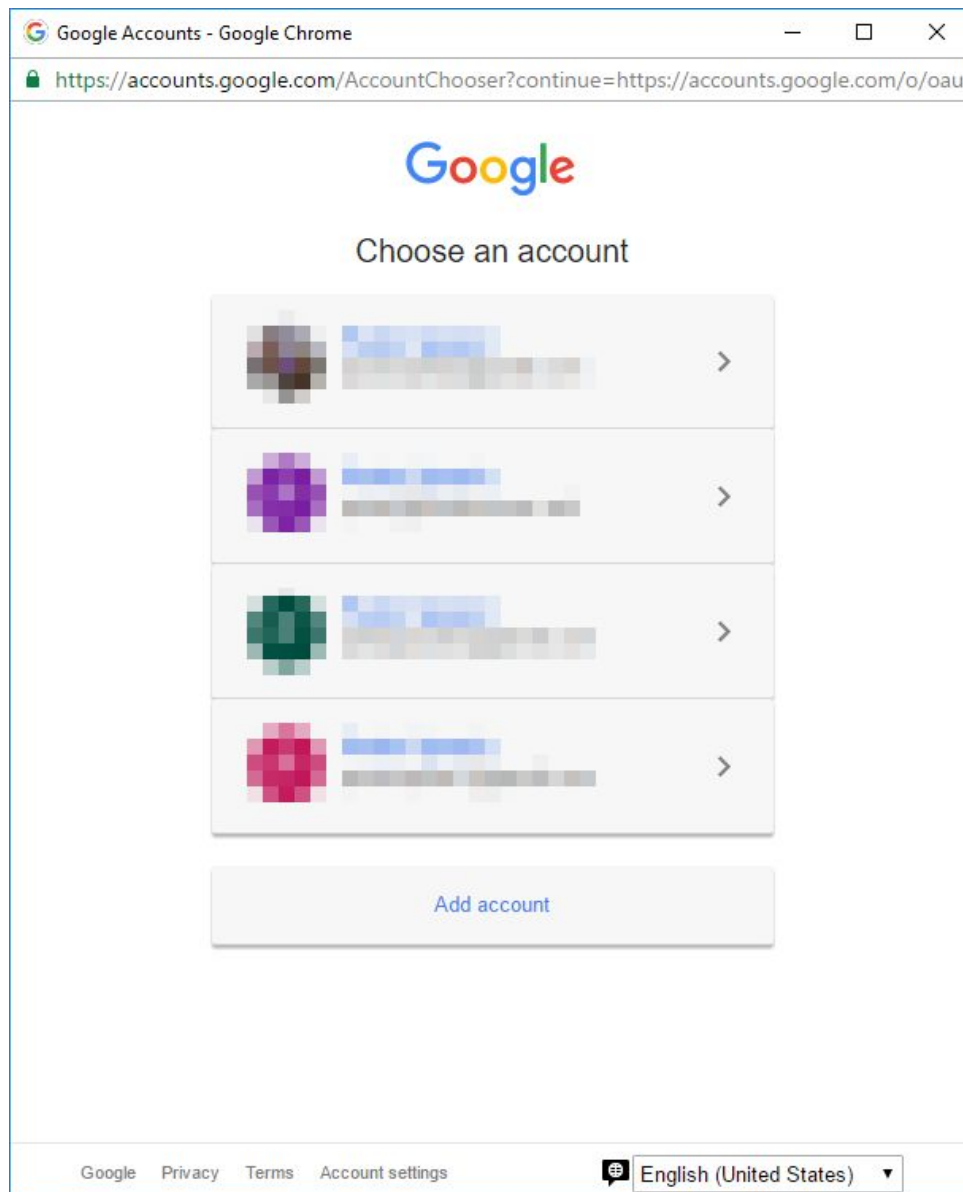
From the dropdown list, select “Google Report.” Then click the “Connect” button.



NOTE: You need to have popups enabled in your web browser for these options to appear on the screen.

Step #4:

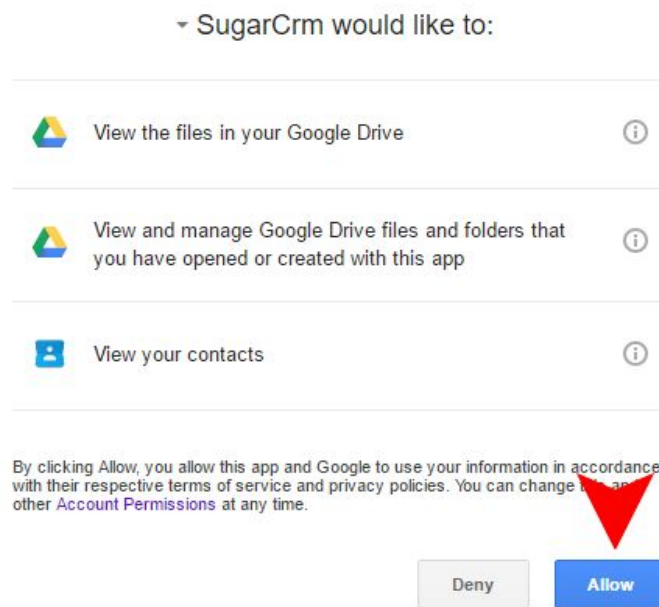
Popup window will appear with a list of your Google Accounts. Select one of these accounts, or choose the "Add account" option to create a new account. The account that you select will receive reports from SugarCRM.



Step #5:

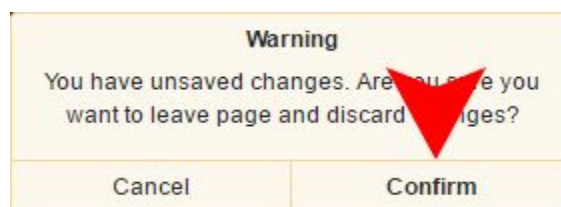
Once you have selected an account, the "Permissions" page will appear. For this plugin to function, SugarCRM needs access to these elements of your Google Drive account. Click "Allow" to enable the plugin.

4 | Google Sheets Business Intelligence Users Guide



Final Step:

Some users may see the warning window below after clicking "Allow" in the previous step. This is caused by a quirk in how the plugin works within the browser, and should not be cause for concern. Simply click "Confirm" to complete the installation.



After the above steps are finished, you will also be able to rename reports. 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.

That's all there is to it! Simply wait for the next export task to run, and your new queries will appear in the Google Drive root in a folder titled "SugarCRM_Reports."