

**Technokrafts Labs  
Pvt. Ltd.**

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	Google Drive.
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# VTIGER CRM 6.5.0 & GOOGLE DRIVE INTEGRATION

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## 1. Introduction

Google Drive is a file storage and synchronization service provided by Google, released on April 24, 2012, which enables user cloud storage, file sharing and collaborative editing. Rumors about Google Drive began circulating as early as March 2006. The 'Google Drive' Module with vtiger CRM 6.5.0 takes advantage of Google's Single-Sign On to access your documents.

## 2. What is Google Drive

### Google Drive

With 5GB of included cloud storage per user,

Google Drive is the hub for all your business files: documents, pictures, videos, presentations and more. This virtual drive space was a rumoured product not long after Google introduced Gmail with an unprecedentedly large amount of storage. There were a few hacks to take advantage of the storage space as a way to store backups of files in the cloud.

## D) Requirements

- vTigerCRM version 6.5.0
- Please take a backup of your database and V-tiger instance before installation of the google drive module.

## 3. Configure Google Drive API

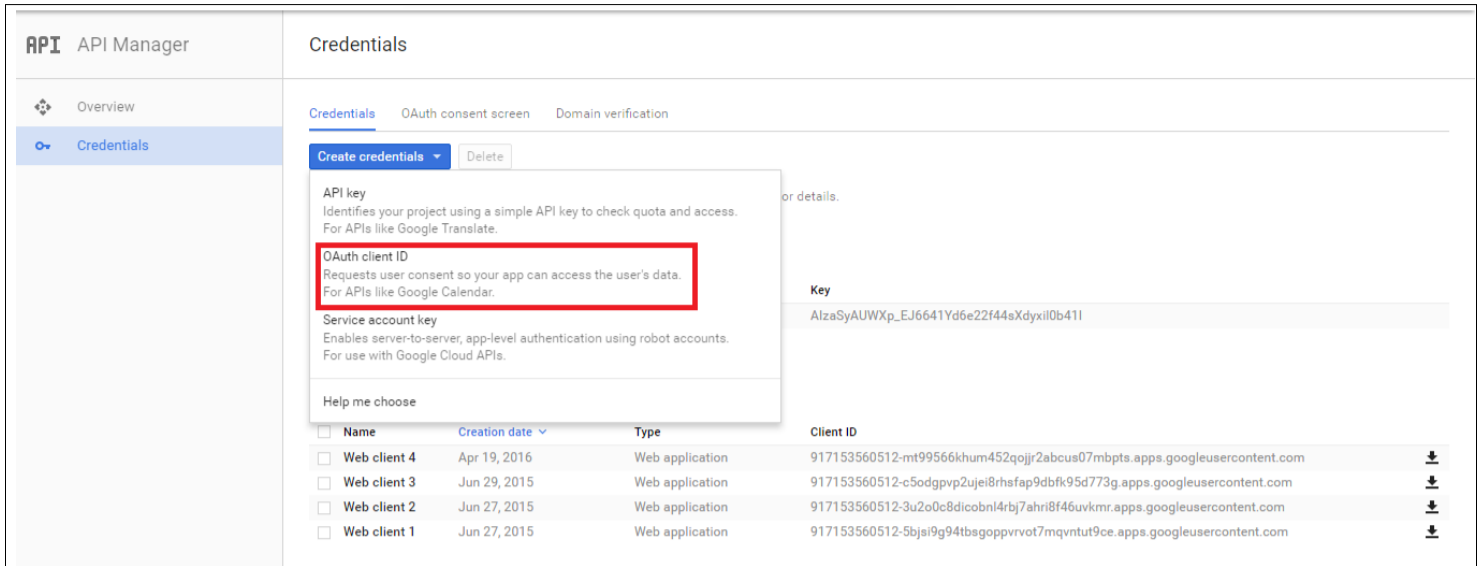
**Note: - If you have already Google drive Client ID and API key, then no need to follow below step directly switch to the Point. 3:- Set the generated Google API Credentials in Vtiger**

- For API key you need to register or login to Gmail Account if you have.
- Please go to [www.gmail.com](http://www.gmail.com) to generate the Google Drive API Credentials.
- Login to google account with your username and password.
- Please go <https://console.developers.google.com/>
- Click on "Credentials" tab.
- Now click on "Create credentials" button.

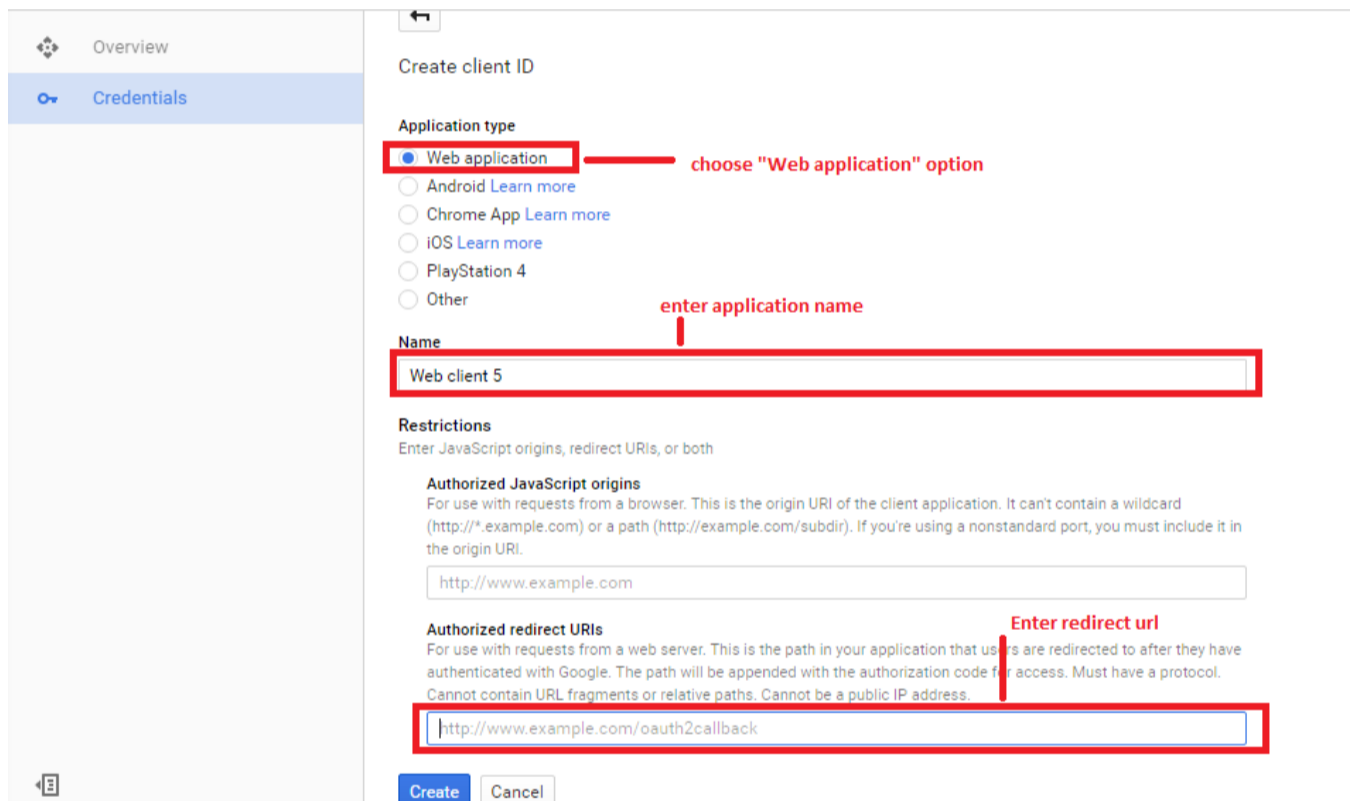
**Note: - We can set the Google API Credentials either by below procedure or by click on Settings-> Google API Credentials.**

In order to create an API key, first you need to create a Project. A project can have multiple services and multiple API keys.

i.e.: With the same API key, you can access multiple services provided by Google.



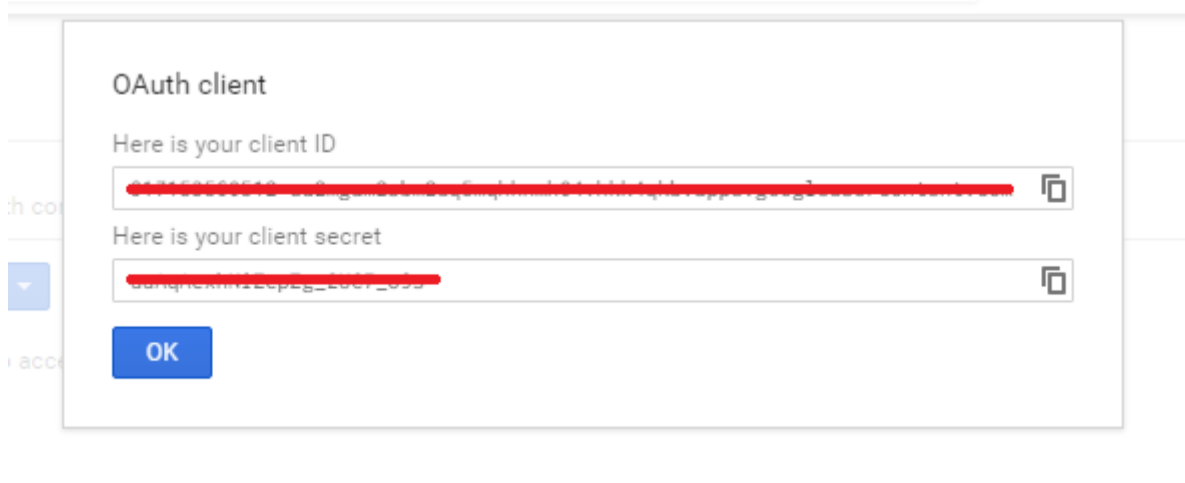
Please click on Create Credentials button. Then choose “Web application” as application type from options.



Please enter require details with web application option and click on “Create” button. Once process complete you will get client id and secret key. Redirect url is your vTiger crm “Google Drive” module url.

Example:

http://yourvtigerurl/index.php?module=GoogleDrive&src\_module=GoogleDrive&src\_field=tns\_gdfilename&view=Popup

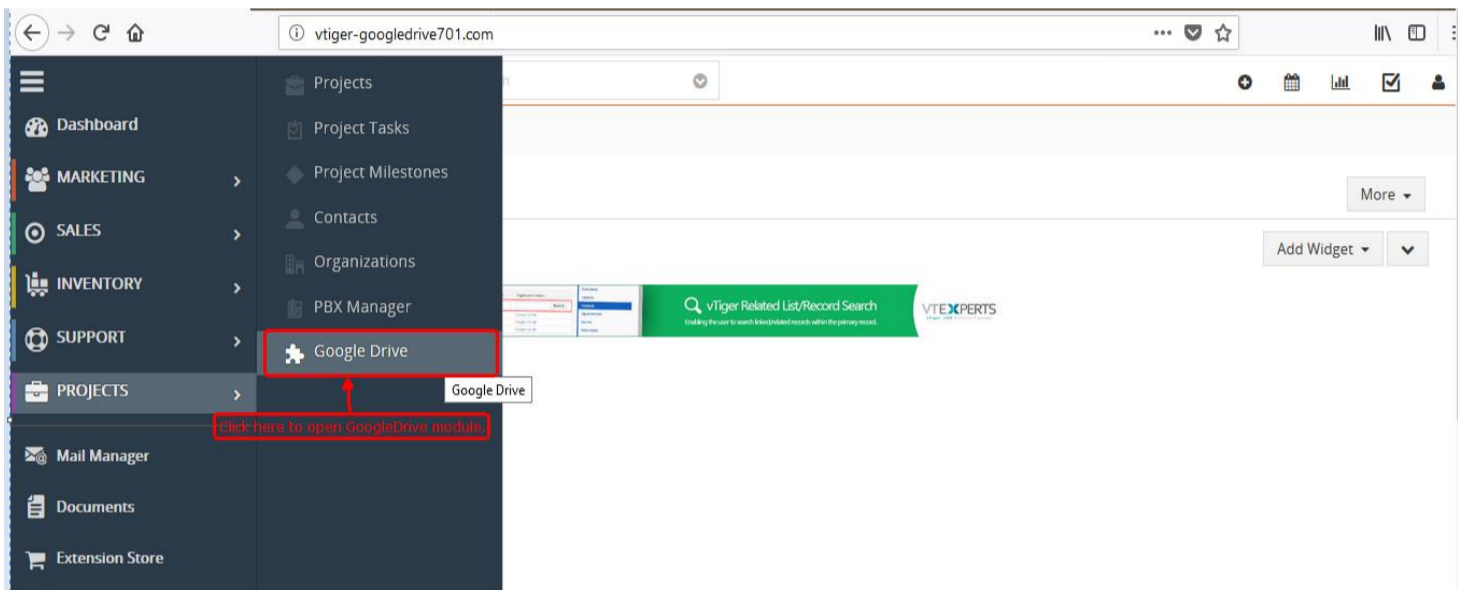


You can edit the information later on with edit credentials option.

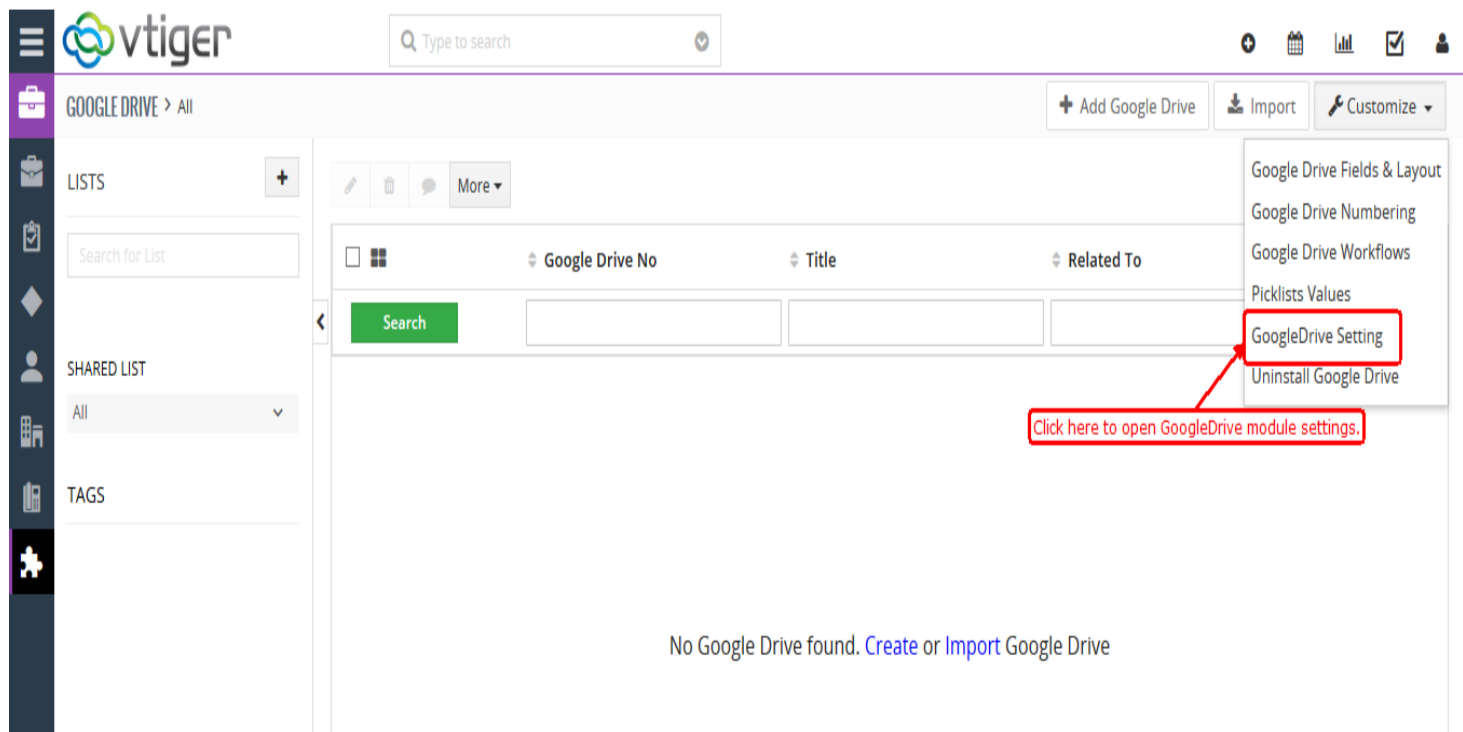
#### 4. Set Google Drive Login Credentials in VtigerCRM

**Note: - We can set the Google Drive Credentials in Vtiger CRM from Settings Tab**

- Open Google Drive Module



- Click on the Google Drive settings as shown below.



- Fill all the required information in the setting tab as shown below.

HOME > Google Drive

Search settings

Google Drive Setting

Google Drive Setting

\* Email :

\* Password :

\* Google Client ID :

\* Client Secret Key :

Note: Please Enter following URL as redirect URL in Google Client ID credential.  
[https://vtiger.com/index.php?module=GoogleDrive&src\\_module=GoogleDrive&src\\_field=tns\\_gdfilename&view=Popup](https://vtiger.com/index.php?module=GoogleDrive&src_module=GoogleDrive&src_field=tns_gdfilename&view=Popup)

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Save

- Enter the URL at the bottom of the setting tab displayed in the GOOGLE API CONSOLE where the Client ID, Secret ID and the APP ID is set.

### Create 'Document' Record with Google Drive Document

- 1) Click on "+" Add Google Drive button.
- 2) Fill the entire field Title and other mandatory fields.
- 3) Select the option "Google Drive File Name".
- 4) If you not connected with the Google drive then click on "Connect Me" Link.
- 5) See below screenshots.

GOOGLE DRIVE > All

+ Add Google Drive Import Customize

LISTS +

Search for List

SHARED LIST

All

TAGS

Google Drive No	Title	Related To	Assigned To
No Google Drive found. <a href="#">Create</a> or <a href="#">Import</a> Google Drive			

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GOOGLE DRIVE > All > Adding new

### Google Drive Document Information

Enter all required field value.

Title *	<input type="text"/>	Google Drive File Name *	<input type="text"/>
Vendors	Type to search	<input type="button" value="Select"/>	Click here to select document from Google Drive
Description	<input type="text"/>		
File Id	<input type="text"/>	File URL	<input type="text"/>
Download URL	<input type="text"/>	Assigned To *	Administrator
Email	<input type="text"/>	Email Template	Select an Option

Click here to save record.

Save Cancel

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Google Drive

Status : Not Connected!

Connect Me!

Click here to Connect.

- 6) After click on "Connect Me" Link. Google authenticate page will be open.
- 7) Then Enter the Email and Password that you have saved in the settings tab.
- 8) Please click on "Accept" button.
- 9) Google Drive documents listed on the page.
- 10) Select any document from list which you want. Selected document set in field "File Name".



Status : Connected!

Google Drive

LogOut

### Google Drive Folder/File List

Select Document from list

- Test
  - testppt
  - Kitchen Leads-copy\_Leads\_2017-08-06\_2017-08-06.csv
  - CUSTOM DESIGN FOR CRM CALL CENTRE MANAGEMENT-p1bqs70ecq1k8q1kag14e13jl4.doc
  - Google-Drive-Tree.html
  - Google-Drive-Tree.html
  - Google-Drive-Tree.html
  - CRM - Hours Worked Field.pdf
  - Freelancer
  - CUSTOM DESIGN FOR CRM CALL CENTRE MANAGEMENT-p1bqs70ecq1k8q1kag14e13jl4.doc
  - Untitled document
  - Vtiger-GoogleSheets.doc
  - a
  - Lead List
  - PHP Scripts With Google Sheet API.zip
  - delete empty rows
  - funnel.php

- 11) After selecting the document all the other information will be filled automatically.
- 12) After selecting the entity record in "Related" module like Organizations, Leads, Contact etc. Email will automatically populate in "Email" field.
- 13) If user want to enter another value in "Email" field then he can changes prefilled value manually.
- 14) This email will use for send google document via email to entered email id.
- 15) User can select the email template from field "Email Template". This field having list of all email templates which are created in system (email template records).
- 16) Selected email template's contents use as email body text which email send to selected email id.
- 17) Please note that the email which will send to the selected email id will not parse the values for fields which are selected in email template.
- 18) Then save the record.
- 19) Please, see screenshot below.

The screenshot shows the Vtiger interface for adding a new Google Drive document. The form is titled "Google Drive Document Information" and contains the following fields:

- Title \***: GoogleDriveTestDocument
- Google Drive File Name \***: GoogleDriveTestDocument
- Organizations**: test organization
- Description**: (Empty text area)
- File Id**: 15HwyvnpGzF8c\_4T1dXBUB
- File URL**: https://docs.google.com/pri
- Download URL**: http://vtiger-googledrive701
- Assigned To \***: Administrator
- Email**: (Redacted)
- Email Template**: Thanks Note

At the bottom of the form, there are "Save" and "Cancel" buttons. Below the form, it says "vTiger-Google Drive Integration :: v 1.1 Powered by :: Technokrafts Labs Pvt Ltd Made In India".

- 20) On Detail-view you will see the link in field "File URL" and "Download URL".



- 21) You can edit or view the google drive document by clicking on the "File URL" link.
- 22) You can also download the File by clicking on the "Download URL" link.
- 23) Please, see the below screenshot shots.

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GOOGLE DRIVE > All > GoogleDriveTestD...

GoogleDriveTestDocument

Summary Details Comments

Google Drive Document Information

Google Drive No	GoogleDrive3	Title	GoogleDriveTestDocument
Google Drive File Name	GoogleDriveTestDocument	Related To	test organization
Description		File URL	<a href="https://docs.google.com/presentation/d/15HwyypnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc/edit?usp=drivesdk">https://docs.google.com/presentation/d/15HwyypnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc/edit?usp=drivesdk</a>
File Id	15HwyypnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc	Assigned To	Administrator
Download URL	<a href="http://vtiger-googledrive701.com/index.php?module=GoogleDrive&amp;action=DownloadFile&amp;FileId=15HwyypnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc">http://vtiger-googledrive701.com/index.php?module=GoogleDrive&amp;action=DownloadFile&amp;FileId=15HwyypnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc</a>	Modified Time	12-22-2017 12:49 PM
Created Time	12-22-2017 12:49 PM		

- 24) When clicked on the "File Url".

GoogleDriveTestDocument

File Edit View Insert Slide Format Arrange Tools Table Add-ons Help Last edit was yesterday at 11:10 AM

Present Comments Share

Background... Layout... Theme... Transition...

1

This is test  
This is test subtitle.

25) When clicked on the "Download URL" the file will get download.

The screenshot shows the vtiger interface with a Google Drive document titled "GoogleDriveTestDocument". A dialog box titled "Opening GoogleDriveTestDocument.ppt" is open, asking the user what they want to do with the file. The options are "Open with OpenOffice Impress (default)", "Save File", and "Do this automatically for files like this from now on". The "Save File" option is selected.

Google Drive No	GoogleDrive3	File URL	GoogleDriveTestDocument
Google Drive File Name	GoogleDriveTestDocume		test organization
Description			
File Id	15HwyvnpnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc		<a href="https://docs.google.com/presentation/d/15HwyvnpnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc/edit?usp=drivesdk">https://docs.google.com/presentation/d/15HwyvnpnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc/edit?usp=drivesdk</a>
Download URL	<a href="http://vtiger-googledrive701.com/index.php?module=GoogleDrive&amp;action=DownloadFile&amp;FileId=15HwyvnpnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc">http://vtiger-googledrive701.com/index.php?module=GoogleDrive&amp;action=DownloadFile&amp;FileId=15HwyvnpnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc</a>	Assigned To	Administrator

26) Click on "Send Document" button for send the google document as an attachment via email to specific email id.

The screenshot shows the vtiger interface with the "Send Document" button highlighted in red. A red callout box points to the button with the text "Click here to send document.".

Google Drive No	GoogleDrive3	Title	GoogleDriveTestDocument
Google Drive File Name	GoogleDriveTestDocument	Related To	test organization
Description			
File Id	15HwyvnpnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc	File URL	<a href="https://docs.google.com/presentation/d/15HwyvnpnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc/edit?usp=drivesdk">https://docs.google.com/presentation/d/15HwyvnpnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc/edit?usp=drivesdk</a>
Download URL	<a href="http://vtiger-googledrive701.com/index.php?module=GoogleDrive&amp;action=DownloadFile&amp;FileId=15HwyvnpnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc">http://vtiger-googledrive701.com/index.php?module=GoogleDrive&amp;action=DownloadFile&amp;FileId=15HwyvnpnGzf8c_4T1dXBUBogKwET-5heeGb2zqY_G6Lc</a>	Assigned To	Administrator
Created Time	12-22-2017 12:49 PM	Modified Time	12-22-2017 12:49 PM
Email		Email Template	Thanks Note

## 5. Benefits of Google Drive

1. Google Drive lets you send large files to your colleagues, clients and friends directly from your Gmail account. When you join Google Drive, you automatically have 5 GB of storage space. It is also possible to buy more GO at a low cost. For Google Drive prices, [click here](#).
2. Google Drive allows you to access your files remotely. Indeed, Google Drive can be synchronized with your computer. With Drive, all your files become available on the web. You have a big presentation coming up? No need for a USB key!
3. Google Drive has its own mobile application which gives you access to your files on your iPhone or smartphone, no matter where you are!
4. Google Drive has an efficient built-in search engine which allows you to find content easily with a keyword search. You can also look for files by owner or by file type.
5. Google Drive is equipped with an OCR (optical character recognition) function, which allows you to search for words or expressions in scanned documents. For example, finding someone's name in an old newspaper article that was scanned and saved on Google Drive is possible thanks to OCR technology!
6. Google Drive allows users to open various types of files, like .ai (Adobe Illustrator) and even .psd (Photoshop) files.
7. Google Drive and Google Docs are complementary programs. Google Docs lets you create documents, spreadsheets and presentations online, and work simultaneously with partners or colleagues on a same document. Changes appear in real time and are saved for thirty days, which makes it possible for you to view earlier versions of your documents. Google Docs also allows you to add certain access privileges to your files and determine who can view, edit or comment a shared document.
8. Google Drive lets you share photos and videos with your contacts. Like Google Docs, your files can be commented. A notification is automatically sent to you when a comment is posted in response to yours.
9. Google Drive uses image recognition technology. This new technology, which is still being perfected, can actually recognize the content of your pictures! Type "Eiffel Tower" in Google Drive's integrated search engine and find pictures of you in front of the Eiffel Tower.
10. The program is free!  
On Google Drive, your data can't get lost, no matter what you do to your computer.