



USER GUIDE

**Bringing Order and Intelligence to Your SageCRM
Data with XIDGenerator**

XIDGenerator – User Guide

AUTOMATIC ID GENERATOR

Automatically assigns unique, meaningful, and structured identifiers to your key entities. It replaces the default numeric IDs with a smart, configurable system that works seamlessly in the background.

- What if your Company IDs could reflect your sales regions? What if your Case numbers immediately indicated the year and product line? This is not just a cosmetic change—it's a fundamental shift towards a more intelligent, efficient, and professional data management system.
- A counter that increments (e.g., 1001, 1002, 1003 and so on.). You can define the starting point and number of digits (e.g., 01002)

Let's deep dive into an essential add-on for any serious SageCRM implementation: The XIDGenerator.

Beyond the Default: Bringing Order and Intelligence to Your Sage CRM Data with XIDGenerator

If you are familiar with SageCRM's default system for identifying records: the auto-incrementing *comm_communicationid* for Communications or the *comp_companyid* for Companies. While functional, these generic numbers (like 1001, 1002, 1003) tell you nothing about the record itself. They lack meaning, can't be easily referenced in conversation, and often lead to confusion and errors in fast-paced business environments.

What if your Company IDs could reflect your sales regions? What if your Case numbers immediately indicated the year and product line? This is not just a cosmetic change—it's a fundamental shift towards a more intelligent, efficient, and professional data management system.

Default numbering to Intelligent Identifiers

The XIDGenerator is an installable add-on for SageCRM that automatically assigns unique, meaningful, and structured identifiers to your entities. It replaces the default numeric IDs with a smart, configurable system that works seamlessly in the background.

XIDGenerator can help you achieve this!

- **Instead of Company ID** 78654, you get REG-0777-USWEST (Region: West, Sequential #777).
- **Instead of Case ID** 43120, you get CS/2026-APR/0015 (Case, Year 2026, Month April, #15).
- **Instead of Quote ID** 10045, you get QT-BIGMALL-26-10001 (Quote, Sales Department, Year '24, #10001).

This will really help you make your data more readable, searchable, and professional.

Overview on how XIDGenerator work with SageCRM:

XIDGenerator is a comprehensive ID generation and management system that allows administrators to configure custom identifier formats for various business entities. This guide covers the administrator interface and configuration options.

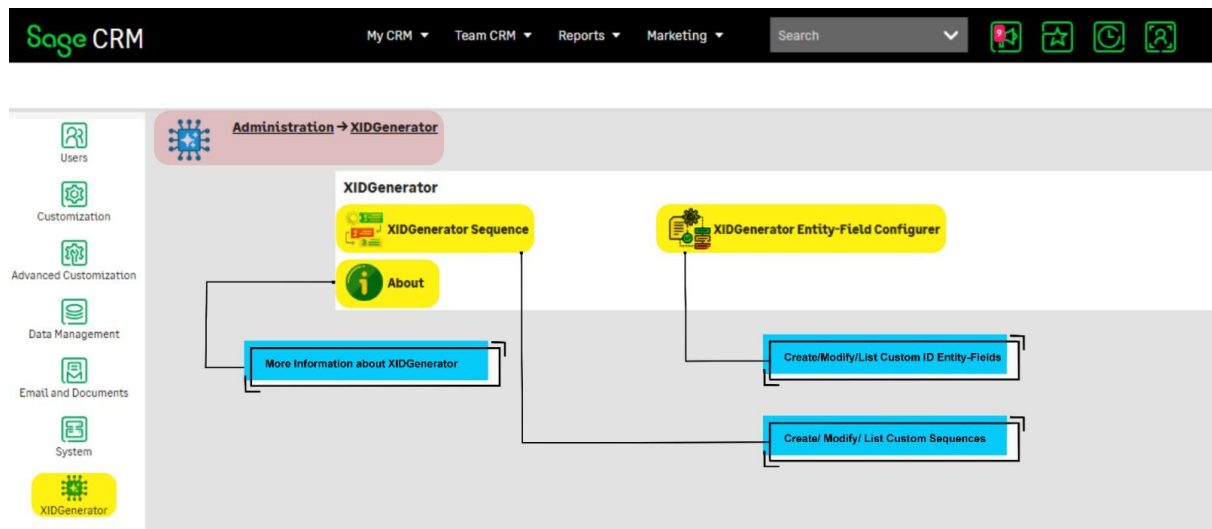
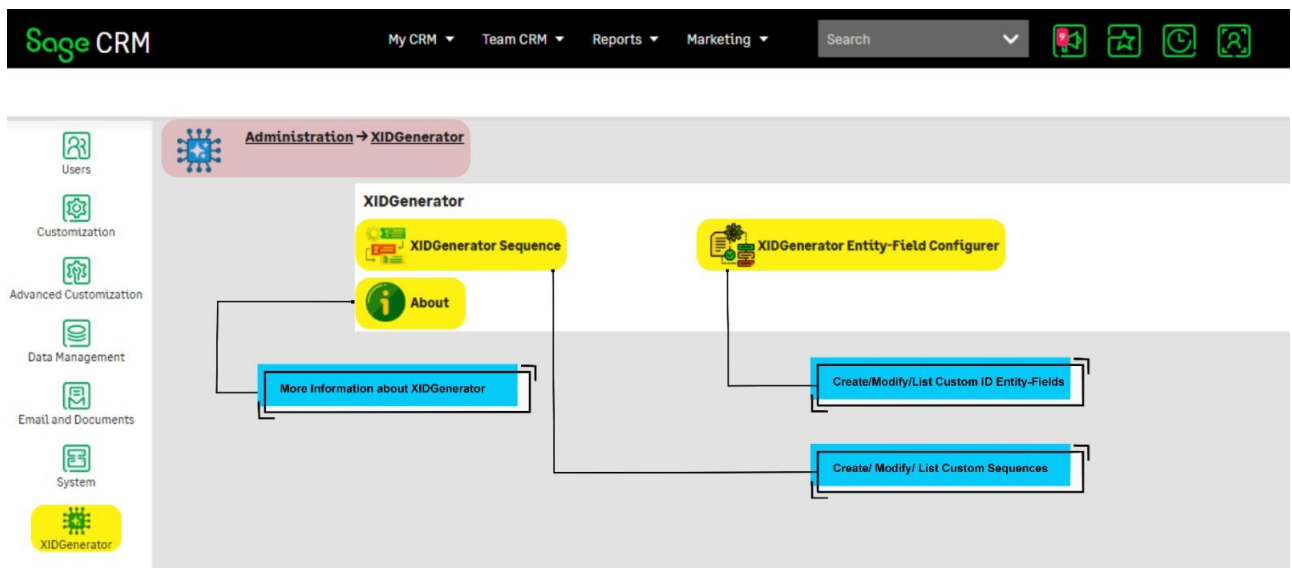
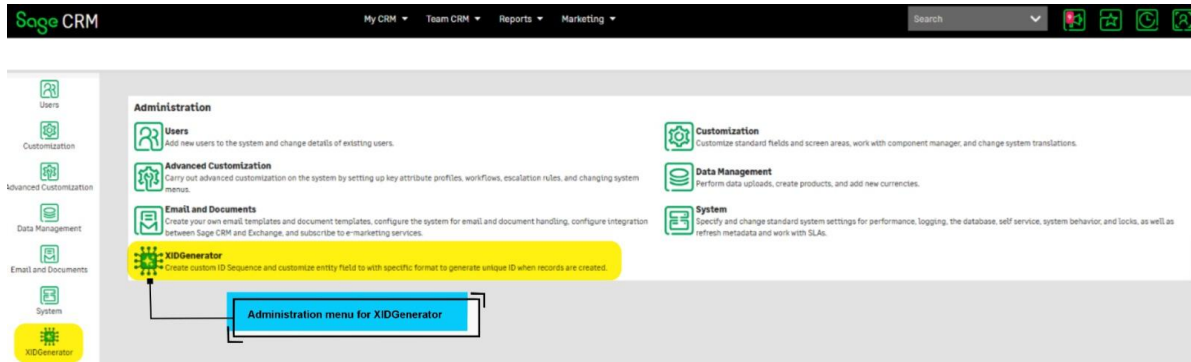
The add-on typically consists of:

- **A dedicated Administration Screen:** Where you define your "ID Patterns" for each entity (Company, Person, Case, Opportunity, etc.).
- **Custom Tables:** To store the pattern definitions, counters, and history.
- **Server-Side Executable :** That does the heavy load to generate and apply the new ID before the record is committed to the database.

Accessing the XIDGenerator Administration Panel

1. Log in with administrator credentials
2. Navigate to: Administration → XIDGenerator
3. You will see the main administration interface divided into several sections

1. IDGenerator Sequence
2. IDGenerato Entity Configurer



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Administration → XIDGenerator → IDGenerator Sequence

New ID Field Configuration >>

Name:

Type: --None--

Details:

Save Cancel

Type of custom Sequence, it can be either Date or Integer

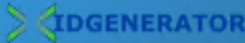
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Administration → XIDGenerator → IDGenerator Sequence

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#	Name	Details	Type	Date Format	Total Digits	Pad Zeros	Start	Next	Status
1	North Region-Sales Opportunities Sequence	All Sales Opportunities for North region will be stamped with North Region-Sales Opportunities Sequence	Integer		4	Y	1,000	0	De-Activate
2	East Region-Sales Opportunities Sequence	All Sales Opportunities for East region will be stamped with East Region-Sales Opportunities Sequence	Integer		5	Y	5,000	0	De-Activate
3	Case Date Stamp Sequence	New cases will be stamped with this Case Date Stamp Sequence.	Date	yyyymmdd	0	Y	0	0	Activate

Listing of all custom sequences

●

NAME	XIDGenerator	v2026.1
DETAILS	<p>Automatically generate unique identity numbers (ID's) for SageCRM records. This add-on will support Integer and Date based ID generation. A wide range of options and mostly any format can be created. Choose from options such as a prefix, suffix, zero padding, starting number, etc. All formats are covered.</p>	

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