

Installing SugarCRM OpenSource Edition On Debian 4.0 (Etch)

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Version 1.0

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SugarCRM is a webbased CRM solution written in PHP. SugarCRM is available as an [OpenSource edition](#) and a ClosedSource version. For a detailed overview of the [different editions](#), have a look at the [SugarCRM website](#). In this tutorial I will describe the installation of the OpenSource edition on Debian 4.0. With the modules *My Portal*, *Calendar*, *Activities*, *Contacts*, *Accounts*, *Leads*, *Opportunities*, *Cases*, *Bugtracker*, *Documents* and *Email*, SugarCRM OpenSource Edition offers everything that can be expected from a CRM solution.

Install The MySQL Database Server

Log in as root user on the shell on your server.

Install unzip, to be able to unpack the SugarCRM package later:

```
apt-get install unzip
```

Install MySQL:

```
apt-get install mysql-server mysql-client
```

-> yes

Run the following command:

```
mysqladmin -u root password yourrootsqlpassword
```

to set the MySQL root password

Create a MySQL user and database for SugarCRM:

```
mysql -u root -p
```

And execute the following commands on the MySQL shell:

```
CREATE DATABASE sugarcrm;

GRANT SELECT, INSERT, UPDATE, DELETE, CREATE, DROP ON sugarcrm.* TO 'sugarcrm'@'localhost' IDENTIFIED BY 'sugarpasswd';

GRANT SELECT, INSERT, UPDATE, DELETE, CREATE, DROP ON sugarcrm.* TO 'sugarcrm'@'localhost.localdomain' IDENTIFIED BY 'sugarpasswd';

FLUSH PRIVILEGES;

QUIT;
```

Replace the word *sugarpasswd* in the above commands with a password of your choice.

Install Apache Webserver And PHP

```
apt-get install apache2 apache2-doc apache2-mpm-prefork apache2-utils libexpat1 libapache2-mod-php5 php5-common php5-gd php5-idn php-pear  
php5-imap php5-mcrypt php5-mhash php5-mysql php5-sqlite php5-xmlrpc php5-xsl php5-curl
```

Set the PHP memory limit:

Open the file `/etc/php5/apache2/php.ini`:

```
vi /etc/php5/apache2/php.ini
```

and change the line:

```
memory_limit = 16M
upload_max_filesize = 2M
allow_call_time_pass_reference = On
```

to:

```
memory_limit = 64M
upload_max_filesize = 20M
allow_call_time_pass_reference = Off
```

and restart apache:

```
/etc/init.d/apache2 restart
```

Continue installing libc-client without Maildir support?

-> Yes

Install SugarCRM

```
mkdir /var/www/crm

cd /tmp
```

```
wget http://www.sugarforge.org/frs/download.php/3103/SugarOS-4.5.1e.zip

unzip SugarOS-*

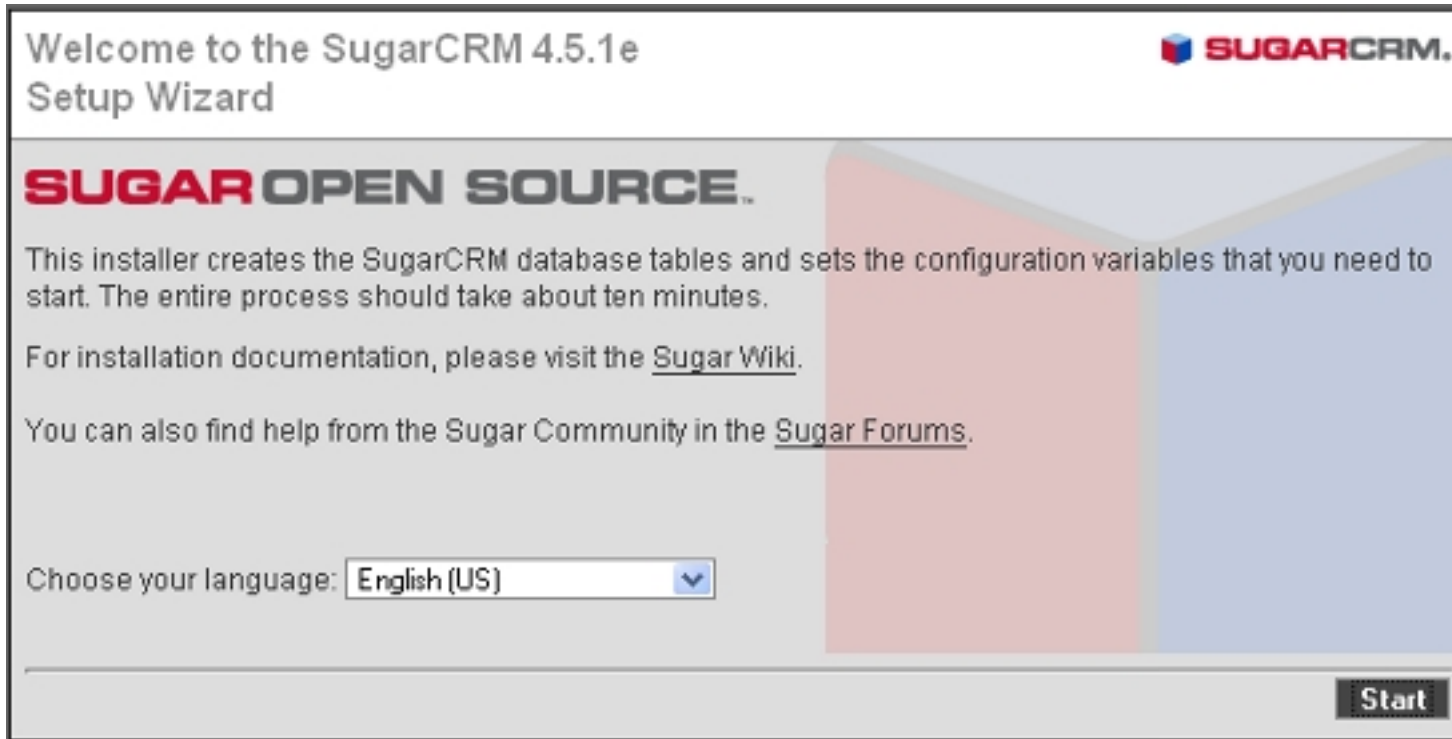
cd SugarOS-Full-*

mv * /var/www/crm/

chown -R www-data:www-data /var/www/crm
```

Start the webbased SugarCRM installer by opening the URL in your browser:

<http://192.168.0.100/crm/>



Select the language:

Step 1: License Acceptance



SUGAR OPEN SOURCE.

The Sugar Public License Version 1.1.3 ("SPL") consists of the Mozilla Public License Version 1.1, modified to be specific to SugarCRM, with the Additional Terms in Exhibit B. The original Mozilla Public License 1.1 can be found at: <http://www.mozilla.org/MPL/MPL-1.1.html>

SUGARCRM PUBLIC LICENSE
Version 1.1.3

1. Definitions.

1.0.1. "Commercial Use" means distribution or otherwise making the Covered Code available to a third party.

1.1. "Contributor" means each entity that creates or contributes to the creation of Modifications.

1.2. "Contributor Version" means the combination of the Original Code, prior Modifications used by a Contributor, and the Modifications made by that particular Contributor.

☒ Accept

Printable View

Help Back Next

Accept the License terms:

Step 2: System Check Acceptance

SUGARCRM.

In order for your SugarCRM installation to function properly, please ensure all of the system check items listed below are green. If any are red, please take the necessary steps to fix them.

For help on these system checks, please visit the [Sugar Wiki](#).

Component	Status
PHP Version	Unsupported PHP Version Installed: (ver 5.2.0-8+etch7)
MySQL Database	OK
MB Strings Module	OK
XML Parsing	OK
PHP Safe Mode Turned Off	OK
PHP Allow Call Time Pass Reference Turned Off	OK
PHP Memory Limit >= 32M	OK (64M)
Writable SugarCRM Configuration File (config.php)	OK
Writable Custom Directory	OK
Writable Modules Sub-Directories and Files	OK
Writable Data Sub-Directories	OK
Writable Cache Sub-Directories	OK
Writable Session Save Path (/var/lib/php5)	OK
Optional Components	Status
IMAP Module	OK
cURL Module	OK
ZLIB Compression Module	OK

*Note: Your php configuration file (php.ini) is located at:
/etc/php5/apache2/php.ini*

Help

Re-check

Back

Next

Check if the prerequisites are met.


If you get a error that MySQL is not available, open the file `/etc/php5/apache2/php.ini` and add the following line at the end of the file:

```
extension=mysql.so
```

and restart apache:

```
/etc/init.d/apache2 restart
```


Step 3: Database Configuration



Please enter your database configuration information below. If you are unsure of what to fill in, we suggest that you use the default values.


^ Required field

Database Configuration

* Host Name / Host Instance	<input type="text" value="localhost"/>	
* Database Name	<input type="text" value="sugarcrm"/>	<input type="checkbox"/> Create Database
* Database Username	<input type="text" value="sugarcrm"/>	<input type="checkbox"/> Create User
Database Password	<input type="password" value="XXXXXXXXXX"/>	
Drop and Recreate Existing Sugar tables? <i>Caution: All Sugar data will be erased if this box is checked.</i>	<input type="checkbox"/>	
Populate Database with Demo Data?	<input checked="" type="checkbox"/>	
Use multi-byte text in demo data?	<input type="checkbox"/>	
Database Account Above Is a Privileged User?	<input checked="" type="checkbox"/>	

Now enter the username and password that we created above for the SugarCRM database. If you want to have some demo data to play with, enable the *Populate Database with Demo Data?* checkbox.

Step 4: Site Configuration



Please enter your site configuration information below. If you are unsure of the fields, we suggest that you use the default values.

*** Required field**

Site Configuration

*** URL of Sugar Instance**

*** System Name**
This will be displayed in the Title Bar of users who visit this SugarCRM installation

*** Sugar Admin Password**
Caution: This will override the admin password of any previous installation.

*** Re-enter Sugar Admin Password**

Sugar Updates Config

Send Anonymous Usage Statistics? ☐
If checked, Sugar will send anonymous statistics about your installation to SugarCRM Inc. every time your system checks for new versions. This information will help us better understand how the application is used and guide improvements to the product.


Automatically Check For Updates? ☒
If checked, the system will periodically check to see if updated versions of the application are available.

Advanced Site Security

Use Defaults? ☒

[Help](#) [Back](#) [Next](#)

Enter a password for the SugarCRM *admin* user.

Step 5: Locale Settings 

If you would like to install a language pack other than the default of US-English, please do so below. Otherwise, click "Next" to continue to the next step.

Locale Settings

Adjust your SugarCRM Locale settings below.

User Interface

Default Date Format:	<input type="text" value="2006-12-23"/>
Default Time Format:	<input type="text" value="23:00"/>
Default Language:	<input type="text" value="US English"/>
Default Name Format:	<input type="text" value="s f l"/> <input type="text" value="Dr. David Livingstone"/>

"s" Salutation
"f" First Name
"l" Last Name

Outbound Email Character Set

Set this to the character set most commonly used in your locale:

	<input type="text" value="ISO-8859-1 (Western European and US)"/>
--	---

Export Settings

Import/Export Character Set (Email, .csv, vCard, PDF, data import):

	<input type="text" value="CP1252 (MS Western European & US)"/>
--	--


Export (.csv) Delimiter:

	<input "="" type="text" value=","/>
--	-------------------------------------

Currency Settings

Default Currency:	<input type="text" value="US Dollars"/>	<input type="text" value="\$"/>	<input type="text" value="USD"/>
Significant Digits:	<input type="text" value="2"/>		
1000s Separator:	<input "="" type="text" value=","/>		
Decimal Separator:	<input type="text" value="."/>		
Example:	<input type="text" value="\$123,456,789.00"/>		

Set the locale and currency settings.

Step 6: Confirm Settings 

Please confirm the settings below. If you would like to change any of the values, click "Back" to edit. Otherwise, click "Next" to start the installation.

Database Configuration	
Database Name	sugarcrm (will not be created)
Database Username	sugarcrm (will not be created)
Drop and Recreate Existing Sugar tables?	No
Populate Database with Demo Data?	No
Privileged Database User Name	sugarcrm

Site Configuration	
URL of Sugar Instance	http://192.168.0.100/crm

Sugar Updates Config	
Automatically Check For Updates?	Yes

Advanced Site Security	
Use a Custom Session Directory for Sugar?	No
Use a Custom Log Directory?	No
Provide Your Own Application ID?	No

Locale Settings	
Default Date Format:	2006-12-23
Default Time Format:	23:00
Default Language:	US English
Default Name Format:	David Livingstone
Import/Export Character Set (Email, .csv, vCard, PDF, data import):	CP1252
Export (.csv) Delimiter:	,
Default Currency:	US Dollars
Currency Symbol:	\$
Currency Code (ISO 4217):	USD
1000s Separator:	,
Decimal Separator:	.


[Help](#) [Back](#) [Next](#)

Confirm your settings.

SugarCRM creates now the database tables. The installer prompts you now to enter your *sugarcrm.com* login data. As I do not have a login, I skip the step

by choosing *Next*.

Step 8: Install Latest Patches




If you would like to skip this step please click the Next button below.

System Patch

- ☐ [Install from Sugar Exchange](#)
- ☐ [Install from local file](#)

Your sugarcrm.com credentials are missing.

[Modify Credentials](#)

Please enter your sugarcrm.com credentials.

UserName

Create an account

Password

Forgotten your password?

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Login


The following patch(es) are ready to be installed.

Name	Version	Date Published	Uninstallable	Description
none				

Install

HelpNext

I do not want to install additional language packs or register on *SugarCRM.com*, so I choose *Next*.


Step 9: Download & Install Language Packs


If you would like to install a language pack other than the default of US-English, please do so below. Otherwise, click "Next" to continue to the next step.

Language Pack

- ☐ Install from Sugar Exchange
- ☐ Install from local file

Your sugarcrm.com credentials are missing.


[Modify Credentials](#)

Please enter your sugarcrm.com credentials.

UserName

[Create an account](#)

Password

[Forgotten your password?](#)

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Login

The following language packs are ready to be installed:

Name	Version	Date Published	Uninstallable	Description
none				

Install

The following language packs have been installed:

Name	Version	Date Published	Uninstallable	Description
none				

Help

Next


You may now register your copy of SugarCRM. I choose to not register and selected *Finish* instead.

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HowtoForge

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Step 10: Registration



Please take a moment to register with SugarCRM by filling out the short form below. By letting us know a little bit about how your company plans to use SugarCRM, we can ensure we are always delivering the right product for your business needs. If you are interested in receiving information about Sugar, please opt-in to our mailing list. We do not sell, rent, share, or otherwise distribute the information collected here to third parties.

Your name and email address are the only required fields for registration. All other fields are optional, but very helpful. We do not sell, rent, share, or otherwise distribute the information collected here to third parties.

*** Required field**

About You

* How did you hear about us?

* First name:

* Last name:

* Company Name

* Job Title

* Email:

* Country:

Your Implementation

* Your company's industry?

* How many employees?

* What is your current CRM solution?

* How many SugarCRM users?

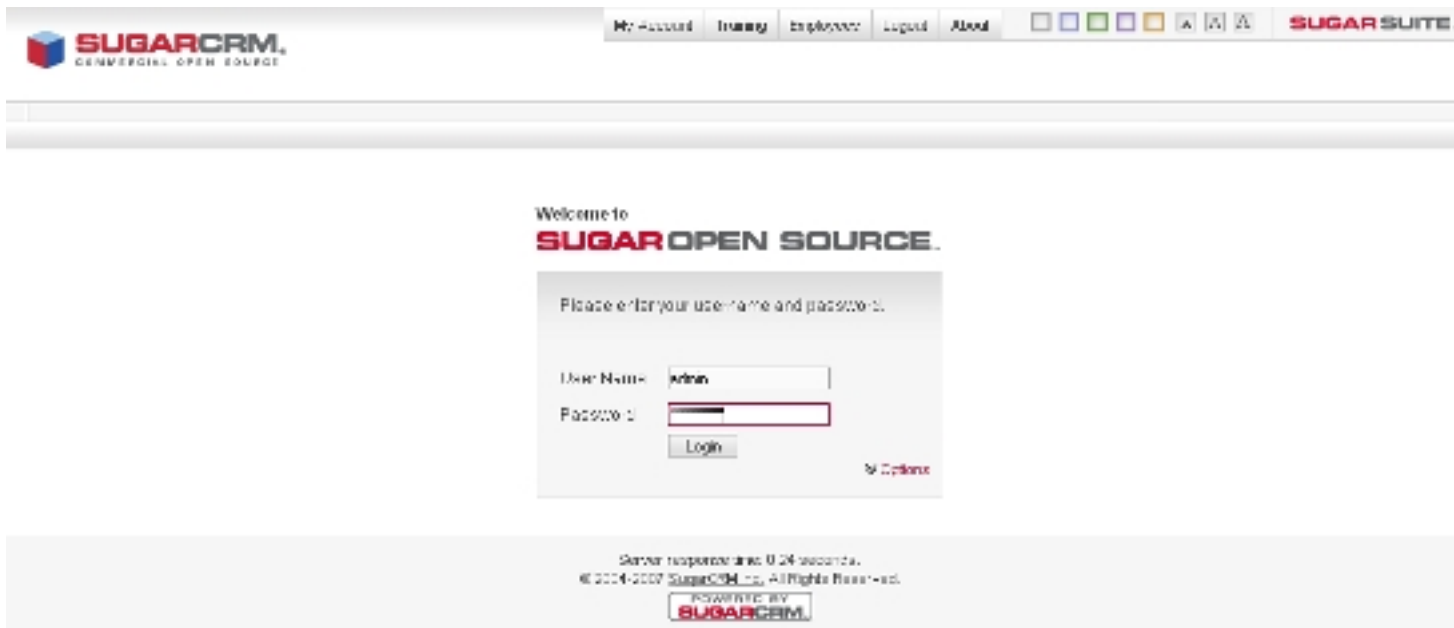
☐ Keep me informed with SugarBUZZ newsletter, product information and special offers (Please respond to a confirmation email sent to above address)

☐ Please have a SugarCRM representative contact me

Send Registration

Help **Finish**

The installation is now finished and the login screen appears. You can login with the username *admin* and the password you chose above. If you use the VMware image of this tutorial, the password is *howtoforge*.

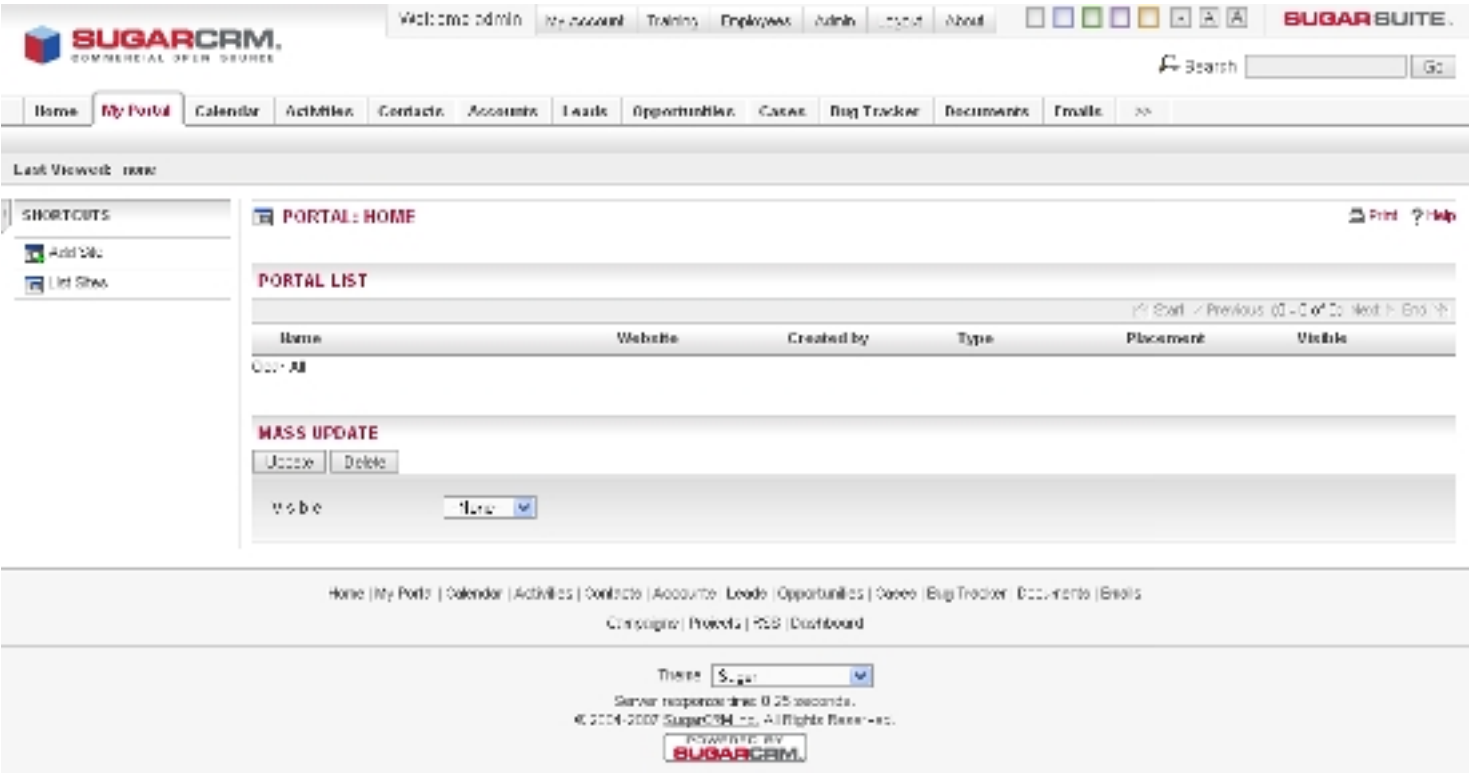


The screenshot shows the SugarCRM Open Source login interface. At the top, there is a navigation bar with the SugarCRM logo on the left and links for 'My Account', 'Training', 'Employee', 'Logout', and 'About' in the center. To the right of these links are several small icons and the text 'SUGAR SUITE'. Below the navigation bar is a horizontal line. The main content area features a 'Welcome to SUGAR OPEN SOURCE.' message. Below this is a login form with the text 'Please enter your user-name and password.' The form contains two input fields: 'User Name' with the value 'Admin' and 'Password' which is masked with asterisks. A 'Login' button is positioned below the password field. To the right of the login button is a link that says 'or Options'. At the bottom of the page, there is a footer area containing the text 'Server response time: 0.24 seconds.', '© 2004-2007 SugarCRM, Inc. All Rights Reserved.', and a small SugarCRM logo.

Next a few screenshots of the SugarCRM UI:

The screenshot displays the SugarCRM OpenSource Edition user interface. At the top, there's a navigation bar with the SugarCRM logo, user account links (Welcome admin, My Account, Training, Employees, Admin, Logout, About), and a search bar. Below this is a main menu with tabs for Home, My Portal, Calendar, Activities, Contacts, Accounts, Leads, Opportunities, Cases, Bug Tracker, Documents, Emails, and a dropdown menu. The main content area is divided into several sections: 'MY CALLS', 'MY MEETINGS', 'MY LEADS', 'MY PIPELINE' (with a funnel chart showing a total of \$0.00K), 'JOTPAD' (a note-taking area), 'MY OPEN CASES', 'MY TOP OPEN OPPORTUNITIES', and 'MY ACCOUNTS'. A sidebar on the left contains links for 'SHORTCUTS' (Create Contact, Enter Business Card, Create Account, Create Lead, Create Organization, Create Case, Export Data, Schedule Meeting, Schedule Call, Create Task, Compose Email) and 'NEW CONTACT' (First Name, Last Name, Phone, Email, Save).

Home



My Portal

The screenshot displays the SugarCRM OpenSource Edition web interface. At the top, the SugarCRM logo is on the left, and a navigation bar contains links: Welcome admin, My Account, Training, Employees, Admin, Logout, and About. To the right of these links are several small icons and the text "SUGAR SUITE". Below the navigation bar is a search bar with a "Go" button. A secondary navigation bar includes links: Home, My Portal, **Calendar**, Activities, Contacts, Accounts, Leads, Opportunities, Cases, Bug Tracker, Documents, Emails, and a "Go" button. Below this is a "Last Viewed" section showing "none".

The main content area is titled "CALENDAR" and features a "Full" view button. Below the title are tabs for "Day", "Week", "Month", "Year", and "Shared". The "Day" tab is selected, showing a calendar for "WEDNESDAY 2007 JULY 11". The calendar grid shows time slots from 8:00 to 10:00. To the right of the calendar is a sidebar with a "Close" button, a "Subject" field, and a "Due Date" field. Below the sidebar is a "Previous Day" button and a "Next Day" button.

On the left side of the main content area, there is a sidebar with a "SHORTCUTS" section containing links: Schedule Call, Schedule Meeting, Create Task, Calls, Meetings, and Tasks. Below this is a "CREATE APPOINTMENT" section with a "Schedule Call" button, a "Schedule Meeting" button, a "Subject" field, a "Start Date" field (set to 2007-07-11), a "Start Time" field (set to 13:00), and a "Save" button.

At the bottom of the page, there is a footer with a navigation bar: Home | My Portal | Calendar | Activities | Contacts | Accounts | Leads | Opportunities | Cases | Bug Tracker | Documents | Emails | **Calendar** | Projects | RSS | Dashboard. Below this is a "Theme" dropdown menu set to "Sugar" and a "Version" field showing "1.0.0".

Calendar

SUGARCRM
COMMERCIAL OPEN SOURCE

Welcome admin | My Account | Training | Employees | Admin | Logout | About

Search

Home | My Portal | Calendar | **Activities** | Contacts | Accounts | Leads | Opportunities | Cases | Bug Tracker | Documents | Emails

Last Viewed: none

SHORTCUTS

- Schedule Call
- Schedule Meeting
- Create Lead
- Create Note or Attachment
- Create Archived Email
- Call
- Meetings
- Tasks
- Notes
- Emails
- Trails
- Import Knowledge

ACTIVITIES: HOME

Basic Search | Advanced Search | Saved Search & Layout

Enter: Contact: Only my items: ☐

Search

CALL LIST

Export | Selected: 0

Close	Direction	Subject	Contact	Related to	Start Date	Assigned User
<p>Export Selected: 0</p>						

Clear All

MASS UPDATE

Update

Assigned to:

Start Date: (YYYY-MM-DD) Status:

Direction:

Home | My Portal | Calendar | **Activities** | Contacts | Accounts | Leads | Opportunities | Cases | Bug Tracker | Documents | Emails

Campaigns | Projects | RSS | Dashboard

Theme:

Server response time: 0.50 seconds
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POWERED BY **SUGARCRM**

Activities

SUGARCRM
COMMERCIAL OPEN SOURCE

Welcome admin | My Account | Training | Employees | Admin | Logout | About

Search

Home | My Portal | Calendar | Activities | **Contacts** | Accounts | Leads | Opportunities | Cases | Bug Tracker | Documents | Emails

Last Viewed: none

SHORTCUTS

- Create Contact
- Create Account Card
- Create Opportunity Card
- Contacts
- Import

Search Shortcuts: **-None-**

NEW CONTACT

First Name:

Last Name:

Phone:

Email:

CONTACTS: HOME

Basic Search | Advanced Search | Saved Search & Layout

First Name: Last Name: Account Name: Only my items: ☐

CONTACT LIST

Export | Merge Duplicates | Selected: 0

<input type="checkbox"/>	Name	Title	Account Name	Email	Office Phone	User
<p>Export Merge Duplicates Selected: 0 <input type="button" value="Start"/> <input type="button" value="Previous (0)"/> <input type="button" value="Next (0)"/> <input type="button" value="End (0)"/></p> <p>Clear All</p>						

MASS UPDATE

Save to Outlook: **-None-** Assigned to:

Account Name: Last Name: **-None-**

Opportunity Role: **-None-** Reports To:

Do Not Call: **-None-** Email Opt Out: **-None-**

Portal Access: **-None-** Involvement: **-None-**

Home | My Portal | Calendar | Activities | Documents | Accounts | Leads | Opportunities | Cases | Bug Tracker | Documents | Emails | Campaigns | Projects | RSS | Dashboard

Contacts

The screenshot shows the SugarCRM OpenSource Edition web interface. At the top, there's a navigation bar with the SugarCRM logo, user information (Welcome admin), and various menu items like My Account, Training, and Admin. Below this is a secondary navigation bar with tabs for Home, My Portal, Calendar, Activities, Contacts, Accounts, Leads, Opportunities, Cases, Bug Tracker, Documents, and Emails (which is currently selected). The main content area is divided into a left sidebar with shortcuts (My Inbox, My Drafts, etc.) and a main panel. The main panel displays the 'EMAILS: MY INBOX' section, which includes an 'EMAIL SEARCH' form, a 'MY INBOX' table with columns for Subject, Contacts, Related to, Reply, Status, and Date Sent, and a 'MASS UPDATE' section with buttons for Update, Delete, and Archive. The footer contains a status bar with a time display, a server status indicator, and a copyright notice for SugarCRM Inc.

Email