



**SUGARCRM**<sup>TM</sup>  
COMMERCIAL OPEN SOURCE

# Sugar Open Source Administration Guide

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Version 4.5

*Sugar Open Source Administration Guide*  
Version 4.5, 2006

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# Preface

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Welcome to Sugar Suite, an open source Customer Relationship Management (CRM) application.

Sugar Suite enables organizations to efficiently organize, populate, and maintain information on all aspects of their customer relationships. It provides integrated management of corporate information on customer accounts and contacts, sales leads and opportunities, plus activities such as calls, meetings, and assigned tasks. The system seamlessly blends all of the functionality required to manage information on many aspects of your business into an intuitive and user-friendly graphical interface.

The system also offers a graphical dashboard to track the sales pipeline, the most successful lead sources, and the month-by-month outcomes for opportunities in the pipeline.

Sugar Suite is based on an open source project, and therefore, advances quickly through the development and contribution of new features by its supporting community.

Welcome to the community!

## About this Guide

The *Sugar Open Source Administration Guide* is designed for system administrators of Sugar Suite. It describes how to configure Sugar Suite to manage user access across the organization.

## Overview

Sugar Suite consists of modules, each of which represents a specific functional aspect of CRM such as Accounts, Activities, Leads, and Opportunities. For example, the Accounts module enables you to create and manage customer accounts, and the Activities module enables you to create and manage activities related to accounts, opportunities, etc. These modules are designed to help you manage customer accounts through each step of their life cycle, starting with generating and qualifying leads to customer support and resolving reported bugs. Because many of these steps are

interrelated, each module displays related information. For example, when you view the details of a particular account, the system also displays the related contacts, activities, opportunities, and bugs. You can not only view and edit this information but also create new information.

As an administrator, you have the power to implement access control for these modules. You can customize the look and feel of Sugar Suite across your organization. You can even create new modules if needed. You can also create multiple forums as platforms of discussion on various topics amongst your users and customers.

## **Core Features**

### **Administration**

- Quickly edit user settings, views and layouts in a single location.
- Customize the application with Sugar Studio so that Sugar Suite meets the exact needs of your company.

## **What's New to 4.5**

With each revision of the Sugar Suite software, significant advances are made in both the feature set and usability of the software. Some of the highlights of version 4.5 are detailed below.

### **Internationalization**

Sugar Suite now supports UTF-8 and multibyte character sets to enable organizations with offices in different language zones to use the same installation of Sugar Suite. You can store data, perform a search, and send emails in any language.

### **Dashlets**

The Home module now displays information as a collection of dashlets. Users can reconfigure these dashlets to display only the information that they want to view. In each dashlet, you can add and remove columns, set filters to view information for a specific time period, a specific user, and so on. Users can add and remove dashlets and move them to any location on the page to reconfigure their home page.

### **Forums**

The Forums module allows organizations to create different forums as a means of collaboration on technical, sales, or general topics among their users. For each forum, you can create one or more threads of discussion on a specific opportunity, bug, or case.

Forums is not a core module. Administrators will need to load it using the Module Loader.

### **Saved Search and Layout**

After you perform a search, you can now save the search results for future use. You can filter and rearrange the search results by hiding unwanted columns and sorting the

visible columns in ascending or descending order. You can also order the search results by columns.

### **Studio**

The new Studio wizard guides administrators through the process of editing module layout, custom fields, drop-down list, and the history information. You can also reconfigure and rename tabs, and edit portals.

## **Related Documentation**

Refer to the following guides for related information:

- *Sugar Open Source User Guide*: Describes how to use the Sugar Suite User Interface and modules.
- *Sugar Open Source Installation Guide*: Describes how to install Sugar Suite.
- *Sugar Offline Client Installation Guide*: Describe how to install and use the Sugar Offline Client.





# System Administration

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This section describes the various tasks that Sugar Suite administrators must perform.

Topics include:

- [“Sugar Network” on page 6](#)
- [“System” on page 7](#)
- [“Users” on page 26](#)
- [“Email” on page 32](#)
- [“Studio” on page 37](#)
- [“Bug Tracker” on page 46](#)

When you log in as Administrator, the Admin link displays at the top right. Click this link to view the Administration page.

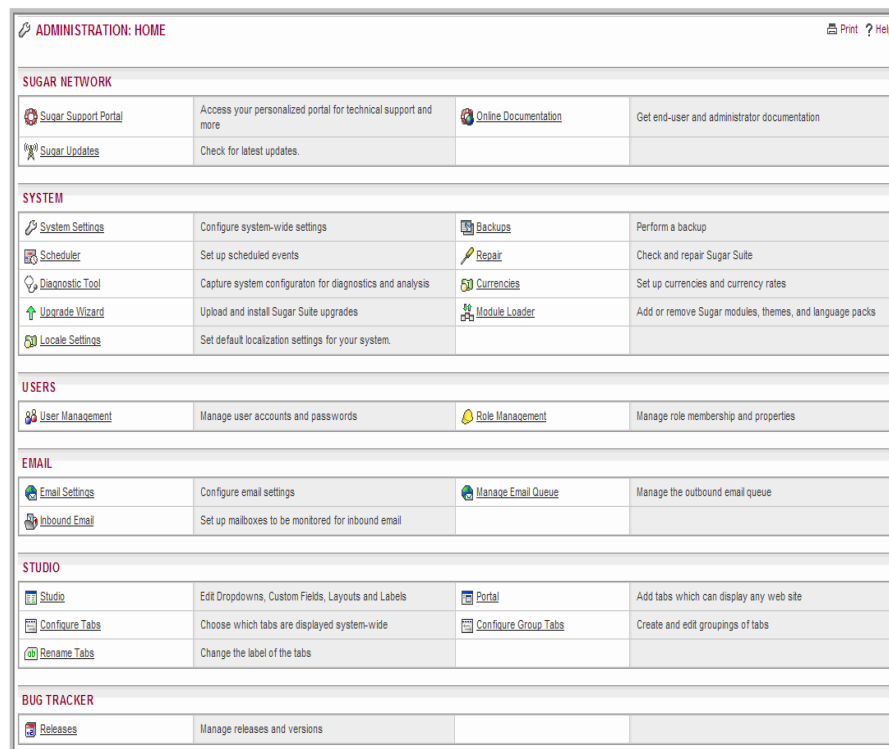


Figure 1 System Administration Module

This page displays several sub-panels that group tasks according to the area of administration.

## Sugar Network

This sub-panel includes options to access the Sugar Suite support, view license information, download the latest Sugar Suite versions and documentation.

### Sugar Support Portal

Use this option to access the SugarCRM forums, search FAQs (Frequently Asked Questions), download the latest Sugar Suite version, buy network subscription, log into the network, file bugs, research reported bugs, and request new features.

The screenshot shows the 'ADMINISTRATION: SUGAR SUPPORT PORTAL' window. It features a welcome message 'Welcome, guest!' and four main action buttons: 'Discuss in the Forums' (with a people icon), 'Download Now' (with a blue arrow icon), 'Search Bug Tracker' (with a magnifying glass icon), and 'Buy Network Subscription' (with a computer monitor icon). Below these is a login section with fields for 'Username' and 'Password', a 'Login' button, and a 'Remember me' checkbox. A link for 'Forgotten your password?' is also present.

The SugarCRM forums cover discussions on a broad range of topics such as application previews, Sugar plug-ins for Microsoft Outlook and Microsoft Word, and localization. If you want to participate in the discussions, you will need to register your organization with SugarCRM, Inc. However, you can view postings on any of the forums without registering your organization.

### Sugar Updates

Use this option to check automatically or manually for Sugar updates.

The screenshot shows the 'ADMINISTRATION: CONFIGURE SUGAR UPDATES' window. It has 'Save' and 'Cancel' buttons at the top left. The main section is titled 'SUGAR UPDATES' and contains the text: 'The Sugar Updates mechanism allows your server to check to see if an update to your version of Sugar is available.' There are two checked checkboxes: 'Send Anonymous Usage Statistics' and 'Automatically Check For Updates'. A 'Check Now' button is located below these options. At the bottom, it states 'You have the latest version available'. A legend indicates that an asterisk (\*) denotes a required field.

If you choose to check for Sugar Suite updates automatically, you will be notified when new Sugar Suite versions or updates are available.

To perform a manual check, click **Check Now**. If you already have the latest version, the message “You have the latest version available” displays at the bottom of the panel.

## Online Documentation

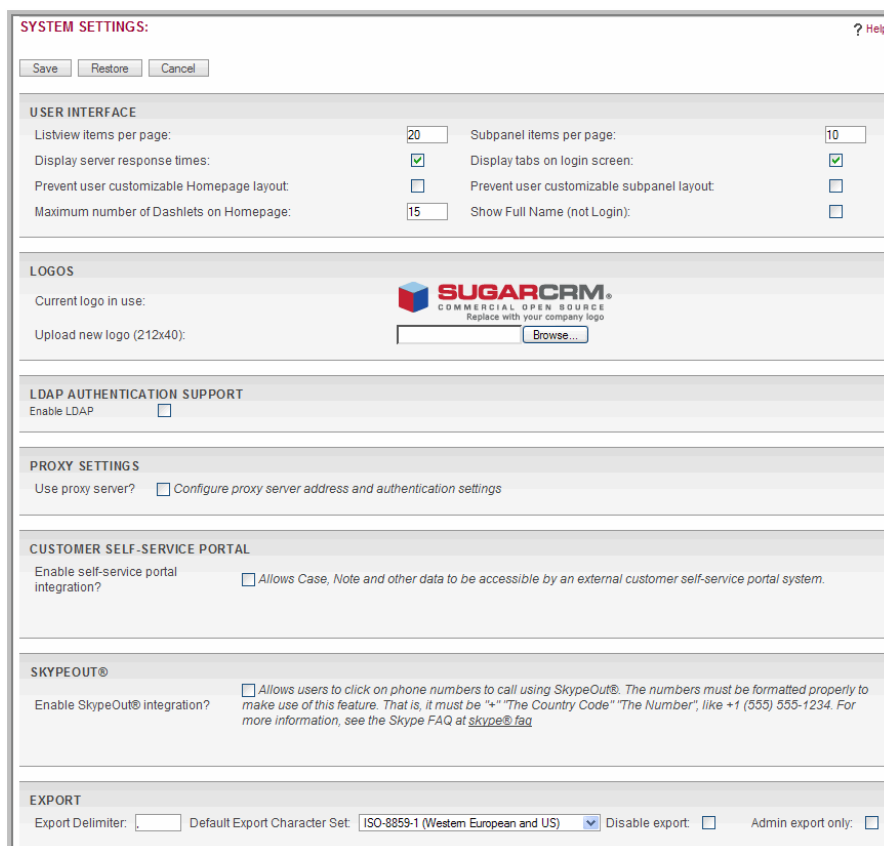
Use this option to view and download PDF copies of available Sugar Suite documentation on installing and using the application and plug-ins.

## System

The options listed under this section allow you to configure system-wide settings that apply to all users in your organization. However, users can override some default settings, such as the default date format, by specifying different settings in their My Accounts page.

## System Settings

Use this option to configure the system settings for your organization.



**SYSTEM SETTINGS:** ? Help

Save Restore Cancel

**USER INTERFACE**


Listview items per page: 20 Subpanel items per page: 10

Display server response times: ☒ Display tabs on login screen: ☒

Prevent user customizable Homepage layout: ☐ Prevent user customizable subpanel layout: ☐

Maximum number of Dashlets on Homepage: 15 Show Full Name (not Login): ☐

**LOGOS**

Current logo in use: 

Upload new logo (212x40):  Browse...

**LDAP AUTHENTICATION SUPPORT**

Enable LDAP ☐

**PROXY SETTINGS**

Use proxy server? ☐ [Configure proxy server address and authentication settings](#)

**CUSTOMER SELF-SERVICE PORTAL**

Enable self-service portal integration? ☐ [Allows Case, Note and other data to be accessible by an external customer self-service portal system.](#)

**SKYPEOUT®**

Enable SkypeOut® integration? ☐ [Allows users to click on phone numbers to call using SkypeOut®. The numbers must be formatted properly to make use of this feature. That is, it must be "The Country Code" "The Number", like +1 \(555\) 555-1234. For more information, see the Skype FAQ at \[skype® faq\]\(#\)](#)

**EXPORT**

Export Delimiter:  Default Export Character Set: ISO-8859-1 (Western European and US) Disable export: ☐ Admin export only: ☐

Figure 2 System Settings page

## User Interface

Use this sub-panel to configure the user interface.

1. Configure the following fields:

**Listview items per page.** Enter the maximum number of records you want displayed in the list view. The system paginates lists that contain more the specified number of records.

**Display server response times.** By default, the Login page displays the time taken to respond when users attempt to log into the system. Deselect this box if you do not want to display this information.

**Prevent user customizable Homepage layout.** Select this box if you want to prevent users from customizing their Home page layout.

**Maximum number of Dashlets on Homepage.** Enter the maximum number of dashlets you want displayed on the Home page.

**Subpanel items per page.** Enter the maximum number of records you want displayed in the list view. The system paginates lists that contain more than the specified number of records.

**Display tabs on login screen.** By default, the Login page displays the Sugar Suite module tabs on the Login page. Deselect this box if you do not want to display these tabs on the Login page.

**Prevent user customizable subpanel layout.** Select this box if you want to prevent users from customizing their detail page layout.

**Show Full Name (not Login).** Select this box if you want the full name for users displayed instead of their login names.

2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**.
4. To exit the page without saving your changes, click **Cancel**.

## Logos

You can upload your organization's logo to display in the Sugar Suite User Interface.

### To upload logos

1. Configure any of the following fields:

**Current logo in use.** Displays your current organization's logo that displays in the User Interface.

**Upload new logo.** Enter the path to the location of the logo that you want to upload from your local machine. Or, click Browse to navigate to the location of the logo on your local machine.

2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

## LDAP Authentication Support

If your organization has implemented LDAP authentication, you can also enable LDAP authentication in Sugar Suite. When your users attempt to log into Sugar Suite,

the application authenticates them against your LDAP directory. If authentication is successful, the user is allowed to access Sugar Suite.

### To enable LDAP authentication

1. In the LDAP Authentication Support sub-panel, select the Enable LDAP box and enter the following information:
  - Server.** Enter the LDAP server name.
  - Base DN.** Enter the base DN name.
  - Bind Attribute.** Enter the attribute name that is used to bind the user's name in LDAP.
  - Login attribute.** Enter the attribute name that is used to search for the user in LDAP.
  - Authenticated User.** Enter the user name.
  - Authenticated Password.** Enter the user's password.
  - Auto Create Users.** Select this option check the Sugar Suite database for the user name and add it if it does not exist in the database.
2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**.
4. To exit the System Settings page without saving your changes, click **Cancel**.

### Proxy Settings

If you are using a proxy server to connect to the Sugar Suite application, you will need to enter the information here.

### To configure a proxy server

1. Configure any of the following fields:
  - Use proxy server.** If you want to connect to Sugar Suite through a proxy server, select this option.

The system displays fields to specify the proxy host and port number.

  - Proxy Host.** Enter the name of the proxy server host
  - Port.** Enter the port number for the proxy host.
  - Authentication.** Select this box if you want to enable proxy authentication, which requires internal users to log into the proxy server with their user name and password. If you do not select this option, all internal users can access the proxy server.
  - User Name.** Enter the user name.
  - Password.** Enter a password for the user.
2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**.
4. To exit the System Settings page without saving your changes, click **Cancel**.

## Customer Self-Service Portal

Select this option to integrate your organization's self-service portal with Sugar Suite. This enables your customers to access your Sugar Suite records such as Notes and Cases.

### To enable self-service portal

1. Select the Enable self-service portal integration box.
2. To save the setting, click **Save**.
3. To restore the previous setting, click **Restore**.
4. To exit the System Settings page without saving your changes, click **Cancel**.

## SkypeOut

Select this option to allow users to make calls through Skype.

### To enable Skype

1. Select the Enable SkypeOut integration box.
2. To save the setting, click **Save**.
3. To restore the previous setting, click **Restore**.
4. To exit the System Settings page without saving your changes, click **Cancel**.

## Export

Use this panel to specify export settings such as the delimiter used to separate data in export files and the default character set used to export data from Sugar Suite. The settings you specify here apply to all users in the organization. However, users can define a different default export character set on their My Account page to export data from Sugar Suite.

This character encoding is also used when importing data into Sugar Suite.

By default, Sugar Suite uses UTF-8 to store data and CP1252 to export data. For locales that use character encoding other than CP1252, you must specify the appropriate default character set. This ensures that the character set used by the Sugar system to create the exported file is mapped to the correct character set on the user's machine. For example, MS Windows uses SJIS in Japan. So, for users in this locale, you will need to select SJIS as the default export character set.

By default, both users and administrators can export files from Sugar Suite. However, you can prevent users from exporting files.

### To export files

1. Set the following options:

**Delimiter.** Specify the delimiter, such as a comma or a period, to use while exporting data.

**Default Export Character Set.** The default is CP 1252. For locales other than US and Western Europe, select the appropriate character set from the drop-down list.

**Disable export.** Select this option if you want to prevent users and administrators from exporting data export.

**Admin export only.** Select this option if you want to allow only administrators to export data.

2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**.
4. To exit the System Settings page without saving your changes, click **Cancel**.

## Advanced

1. Select any of the following advanced configuration options:

**Validate user IP address:** Select this option to validate the IP addresses of users who log into Sugar Suite.

**Log slow queries.** Select this option to log the system's slow responses to user queries in the *sugarcrm.log* file.

**Maximum upload size.** Enter the maximum file size, in KB, that users are allowed to upload.

**Log memory usage.** Select this option to record memory usage in the *sugarcrm.log* file.

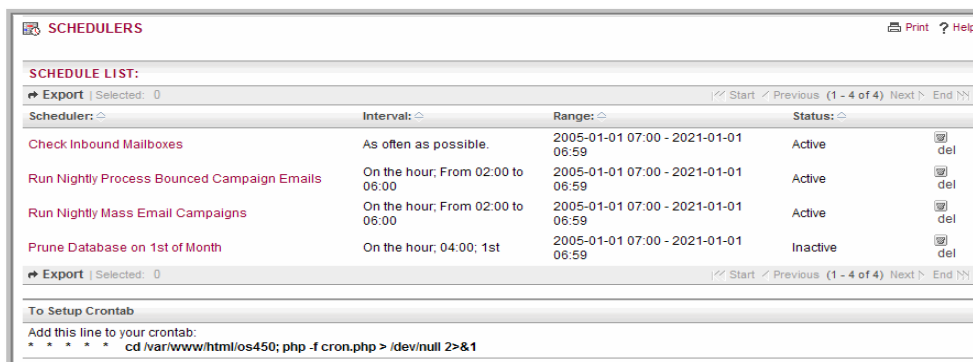
**Slow query time threshold.** Specify the threshold, in milliseconds, that defines slow queries. Queries that take longer than the threshold time are logged in the *sugarcrm.log* file.

**Display stack trace of errors.** When you select this option, if an error occurs when users are running the application, the system displays where the error occurred in the application's stack trace.

2. To save the settings, click **Save**.
3. To restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

## Scheduler

Use this option to schedule jobs such as dispatching Emails and pruning the database.



The screenshot shows the 'SCHEDULERS' page with a 'SCHEDULE LIST' table. The table has columns for Scheduler, Interval, Range, Status, and a delete icon. There are four rows of scheduled jobs. Below the table, there is a section for 'To Setup Crontab' with instructions to add a line to the crontab.

Scheduler	Interval	Range	Status	
Check Inbound Mailboxes	As often as possible.	2005-01-01 07:00 - 2021-01-01 06:59	Active	del
Run Nightly Process Bounced Campaign Emails	On the hour, From 02:00 to 06:00	2005-01-01 07:00 - 2021-01-01 06:59	Active	del
Run Nightly Mass Email Campaigns	On the hour, From 02:00 to 06:00	2005-01-01 07:00 - 2021-01-01 06:59	Active	del
Prune Database on 1st of Month	On the hour, 04:00, 1st	2005-01-01 07:00 - 2021-01-01 06:59	Inactive	del

To Setup Crontab  
Add this line to your crontab:  
\* \* \* \* \* cd /var/www/html/os450; php -f cron.php > /dev/null 2>&1

The Scheduler integrates with external UNIX and Windows systems to run jobs that are scheduled through those systems.

You can schedule the following types of job:

**Check Inbound Mailboxes.** This job monitors inbound Emails in active mailboxes that you set up using the Inbound Email option in the Email panel of the Admin page.

**Run Nightly Process Bounced Campaigns Emails.** This job polls any mailbox in which, the “Possible Actions” parameter is set to “Bounce Handling”. This is an essential component of Mass Email Campaign monitoring.

**Run Nightly Mass Email Campaigns.** This job processes the outbound email queue for your organization’s mass campaign Emails.

**pruneDatabase on 1st of Month.** This job reads all the tables in your Sugar Suite database, finds records that have been soft-deleted (deleted = 1), creates a large SQL file, and physically deletes those records. It is mostly a performance job, and is not essential to the use of Sugar. The backup files are placed in cache/backups with time-stamped filenames.

## Configuring Settings for Scheduler Jobs

For UNIX and Linux systems, you can will need to add a new `cronjob` to your `crontab`. For Microsoft Windows, you can use the Task Scheduler.

## Unix and Linux Systems

### To add a new cronjob to your crontab

1. At the command prompt, type `crontab -e`.
2. Enter the following line to your `crontab`:

```
* * * * * cd /path/to/sugar/crm; php -f cron.php > /dev/null 2&>1
```
3. Ensure that the `/path/to/` is correct for your instance.
4. Save your changes and close.

If you encounter problems, do the following:

1. Determine who the Apache server runs as.

In a properly configured virtual host environment provided by your host, Apache will run as your Login user ID for files in your virtual directory. If you are unsure, contact the Customer Service department for your host.

  - a. Search for a file named `httpd.conf`. Typically, this file is located in the `/etc` folder. It will vary with the distribution.
  - b. Open the file using a text editor and locate a line that starts with “User”. The word(s) that follow it directly is the name of the User that Apache will run as on your system.
2. Determine the capabilities of your PHP installation.

The Sugar Scheduler is designed to work with PHP and its extensions; specifically the database connector, the IMAP libraries, and the cURL libraries.

Ensure that the PHP binary (`php-cli` or just `php`) is available and has those libraries available.



Search for the PHP binary as follows:

- a. Type `which php`. On most correctly configured PHP installations, you will find the binary in `/usr/bin` or `/usr/local/bin`. If so, move on to Step 3.

Or

- b. Type `find / -name php`. Typically, this command will return a long list. Parse through the list to find an executable file named *php*.
- c. If you cannot find the PHP binary, scroll down to the *Troubleshooting Tips* at the end of this section and read item No. 2.

### 3. Create a *cronjob* for the Apache user

- a. Type `crontab -e -u [the Apache user]`.
- b. Enter the following line to your crontab:

```
* * * * * cd /path/to/sugar/crm; php -f cron.php > /dev/null 2&>1
```

- c. To fine tune this job, change the first two “\*”. The first is the “Minutes” value, the second is the “Hours” value.

For example, to run the cronjob every 3 minutes, enter:

```
*/3 * * * * cd /path/to/sugar/crm; php -f cron.php > /dev/null 2&>1
```

### 4. Test the crontab line as follows to confirm that your system is ready to run:

- a. At a terminal prompt, copy and paste the command for your cronjob, and run it; the logic here is that if the command will execute successfully when run manually, the crontab will be able to execute successfully as well.

- b. If your cronjob looks as follows:

```
* * * * * cd /var/www/html/sugarcrm; php -f cron.php > /dev/null 2&>1
```

type the command from “cd..” to “2&>1” into a terminal and press Enter.

- c. If any errors occur, refer to [“Troubleshooting Tips” on page 16](#).

### 5. Save your changes and close.

## Microsoft Windows (2000, XP, Server) Systems

Set up the Windows batch file as follows:

1. Create a batch file that will execute all the necessary commands.
2. Enter the following paths in the batch file:
  - o `cd c:\path\to\your\sugarinstance`  
This folder should contain the *cron.php* file.
  - o `c:\path\to\your\php.exe -c c:\windows\php.ini -f cron.php`
3. Run the batch file from a command prompt to ensure that the output has no errors.
4. If you encounter problems, do the following:
  - a. Determine which PHP binary to use based on your PHP version.

### PHP 4.x

If your system has a 4.x version of PHP, the PHP-CGI binary is named `php.exe` and is typically located in the root folder of your PHP install folder. To allow it to interact with the dynamic libraries, specify the location of the `php.ini` file. This can vary from system to system. If you are unsure, enter the following command:

```
c:\php\php.exe -r phpinfo();
```

The system will identify the `php.ini` file and its location.

### **PHP 5.x**

If your system has a 5.x version of PHP, the PHP-CGI binary is named `php-cgi.exe` (not `php-cli.exe`) and is typically located in the root folder of your PHP install folder. To allow it to interact with the dynamic libraries, specify the location of the `php.ini` file. This can vary from system to system. If you are unsure, enter the command described above.

The system will identify the `php.ini` file and its location.

5. Create the batch file.
  - a. Click **Scheduler** in the Systems panel of the Admin page.

At the bottom of the default screen, you will see the contents of the commands you need to add to a batch file.
  - b. Open `notepad.exe`, copy and paste what Sugar Suite's recommendation into a blank file.
  - c. Change the Save As Type to "dropdown to All Files \*.\*. " and save it as a .bat file.

---

**Note:** Remember that this is only a recommendation, and may not work for your particular instance. Pay attention to the folder paths as they are often the cause for problems with the Scheduler.

---

6. Test the batch file.
  - a. From the command prompt, navigate to the folder where you saved the batch file.
  - b. Enter the full name of the batch file to execute it.
  - c. Note and correct any reported errors, usually related to unfound paths.
7. Create a scheduled task.
  - a. Click **Start** and navigate to Control Panel/Scheduled Tasks/Add Scheduled Task.
  - b. Go through the Wizard, browse to the batch file you just created, and select it.
  - c. Schedule a daily job, and ensure that you select Open advanced properties for this task when I click finish.
  - d. On the Advanced Properties page, navigate to the Schedule tab and then click **Advanced**.
  - e. Check off Repeat task to enable the fields below it, and have it repeat Every Minute (or whatever you find appropriate).
8. Save your changes and close the Wizard.

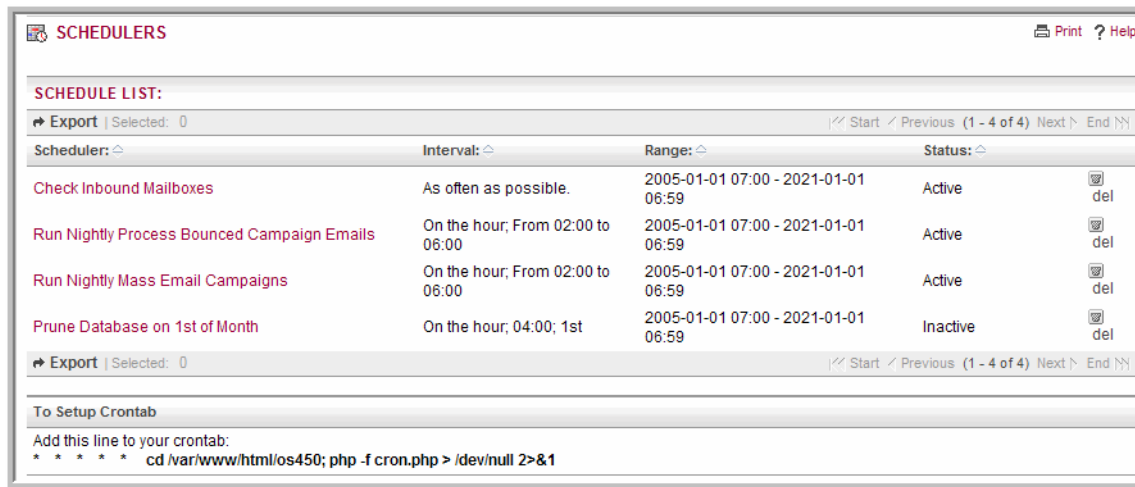
### To schedule a job

1. In the Shortcuts menu of the Scheduler home page, click **Create Scheduler**.
2. In the Basic Setup sub-panel, enter the following information:
  - Job Name**. Enter a name for the job.
  - Status**. From the drop-down list, select Active to run the job at the specified intervals; select Inactive if you only want to save the job schedule information but not run the job.
  - Job**. Select a job from the drop-down list. The OR field is not used.
  - Interval**. Specify the time interval to check for new scheduled jobs.  
The default is every one minute daily.
3. For advanced options, click the **Advanced Options** link below the Job field.  
The Advanced Options sub-panel displays below.
4. Enter information for the following fields:
  - Execute If Missed**. Select this box to run any jobs that the scheduler missed.
  - Date & Time Start**. Click the Calendar icon and select the start date for the job; select the time, in hours and minutes, from the adjacent drop-down list.
  - Date & Time End**. Click the Calendar icon and select the end date for the job; select the time, in hours and minutes, from the adjacent drop-down list.
  - Active From**. From the drop-down list, select the time, in hours and minutes, when the job becomes active.
  - Active To**. From the drop-down list, select the time, in hours and minutes, when the job becomes inactive.
5. Click **Save** to create the job; click **Cancel** to exit the page without creating the job.

### To manage scheduled jobs

1. In the System sub-panel of the Admin page, click **Scheduler**.

The Schedule List page displays.



**SCHEDULERS** Print ? Help

**SCHEDULE LIST:**

Export | Selected: 0 | Start / Previous (1 - 4 of 4) Next / End

Scheduler: ▾	Interval: ▾	Range: ▾	Status: ▾	
Check Inbound Mailboxes	As often as possible.	2005-01-01 07:00 - 2021-01-01 06:59	Active	
Run Nightly Process Bounced Campaign Emails	On the hour; From 02:00 to 06:00	2005-01-01 07:00 - 2021-01-01 06:59	Active	
Run Nightly Mass Email Campaigns	On the hour; From 02:00 to 06:00	2005-01-01 07:00 - 2021-01-01 06:59	Active	
Prune Database on 1st of Month	On the hour; 04:00; 1st	2005-01-01 07:00 - 2021-01-01 06:59	Inactive	

Export | Selected: 0 | Start / Previous (1 - 4 of 4) Next / End

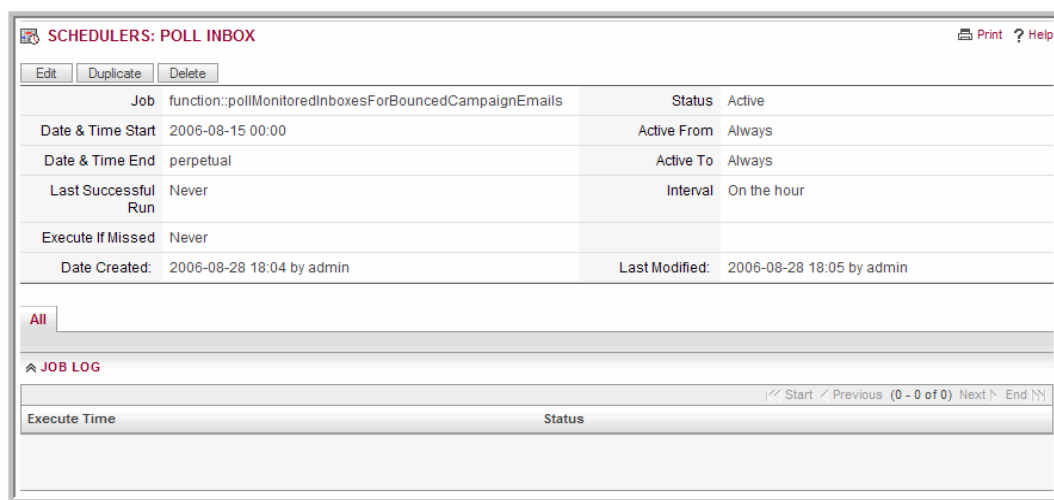
To Setup Crontab

Add this line to your crontab:

```
* * * * * cd /var/www/html/os450; php -f cron.php > /dev/null 2>&1
```

Figure 3 Schedule List

- Select any job from the job list to view its settings or the Job log. You can edit, duplicate, or delete the settings. You can also delete a job by clicking the **del** icon corresponding to the job in the Schedule list.



**SCHEDULERS: POLL INBOX** Print ? Help

Edit Duplicate Delete

Job	function::pollMonitoredInboxesForBouncedCampaignEmails	Status	Active
Date & Time Start	2006-08-15 00:00	Active From	Always
Date & Time End	perpetual	Active To	Always
Last Successful Run	Never	Interval	On the hour
Execute If Missed	Never		
Date Created:	2006-08-28 18:04 by admin	Last Modified:	2006-08-28 18:05 by admin

All

**JOB LOG**

Start / Previous (0 - 0 of 0) Next / End

Execute Time	Status
--------------	--------

Figure 4 Scheduler Job View

- To edit the settings, click **Edit**.
- Make the necessary changes and click **Save** to update the settings; click **Cancel** to exit the page without saving your changes.

## Troubleshooting Tips

### Linux

- The Sugar Scheduler fails to run even though the *cron.log* file shows that the crontab is triggering the new job.
  - The Apache user's PATH does not include the location of the PHP binary.
    - Change the crontab entry to include the FULL path to the PHP binary as shown below:

```
* * * * * /usr/local/bin/php -f cron.php > /dev/null
2&>1
```

- o The Apache user's PATH does not include the location of the *php.ini* file, and thus the external libraries (such as *mod\_mysql* and *mod\_imap*) are unavailable at run time.

- Change the crontab entry to include a PHP switch to explicitly define a *php.ini* to use as shown below.

```
* * * * * php -c /path/to/your/php.ini -f cron.php > /
dev/null 2&>1"
```

## 2. No PHP binary found or it is broken.

- o Change the mechanism by which your cronjob calls Sugar's *cron.php*.
  - Determine if this is an option at this time by finding either “curl” or “wget” on your system. This is done with the commands “which curl” and “which wget”.

If you use *cURL*, your crontab entry should look as follows:

```
* * * * * curl --silent http://yourdomain/
yoursugarcrminstance/cron.php
```

If you use *wget*, your crontab entry should look like:

```
* * * * * wget -q http://yourdomain/
yoursugarcrminstance/cron.php
```

---

**Note:** Both *curl* and *wget* have numerous switches that do not always map to different versions on different platforms. Experiment in the terminal until you find the “perfect” line, and add it as the line for your crontab entry.

---

## Windows.

1. The most common problem is that the PHP binary does not have the proper libraries available at run time. As a result, it cannot make calls to your database or to your email server. To force PHP to be aware of these libraries, it needs to access the *php.ini* file, which in turn tells it where to find everything that is available.

- a. Locate the *php.ini* file: if you are unsure, run the following command:

```
phpinfo();
```

The system identifies the *php.ini* file and its location.

2. The second most common breakage is incorrect paths to the extensions that PHP needs; a map is useless if the information is bad.

- a. Open *php.ini* in your favorite text editor.
- b. Find the section named “Paths and Directories”.
- c. The pertinent entry is “*extension\_dir*”
- d. Keeping in mind that this file piggybacks on Window's \$PATH\$ variable, double-check the paths listed.
- e. Correct any errors - sometimes giving an absolute path solves hard-to-diagnose problems, i.e., full path listing from c:\... onwards.

Necessary extensions are disabled.

- f. Open your *php.ini* file in a text editor.
- g. Find the section named "Dynamic Extensions".
- h. Scroll to the Windows-specific list.
- i. Make sure that the necessary extensions are uncommented (no ";" preceding the line). The bare minimum for Sugar Scheduler to run is to have `php_curl`, your database connector, typically `php_mysql` (for PHP5), and `php_imap`.
- j. Test the batch file again.

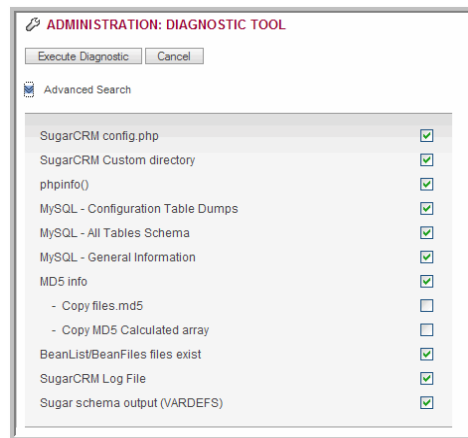
## Diagnostic Tool

Use this option to capture system configuration for diagnostics and analysis. The diagnostic tool pulls up various information about the system and stores it in a zip file on the server for download. When you send a help request to Customer Support, you can attach the file because it summarizes all the basic information required to resolve the problem.

### To capture system configuration

1. In the Diagnostic Tool page, click **Execute Diagnostic** to run the tool.
2. To capture specific configuration information, click the **Advanced** link below the **Execute Diagnostic** button.

The system displays a list of system configuration files. By default, the system captures configuration information for all the selected files.



The system performs the following actions of these files:

**SugarCRM Config.php** - Copies the config.php from the root directory after replacing the DB password with asterisk for security purposes.

**SugarCRM Custom directory** - Copies the custom directory to a Zip file to enable Customer Support to know what has been customized through the Layout Editor.

**phpinfo()** - Executes phpinfo and stores it in a file.

**MySQL - Configuration Table Dumps** - copies a few tables from the DB and replaces sensitive information with asterisk for security purposes.

**MySQL - All Tables Schema** - writes the schema for all tables to an HTML file.

**MySQL** - General Information - Pulls up some general information, like MySQL version, character sets, etc.

**MD5 info** - Runs md5 checks on all files in the sugar directory and compares it against a stock Sugar install's md5s. This enables Customer Support to learn which, if any, files have been manually customized.

**BeanList/BeanFiles files exist** - If a custom module has been loaded, and the author did not define these references correctly, it can cause problems. This action checks all the references to ensure they are correct.

**SugarCRM Log file** - copies the log file.

3. Deselect the ones you do not want to view and then click **Execute Diagnostic**.

The system creates a Zip file that contains the captured configuration information.



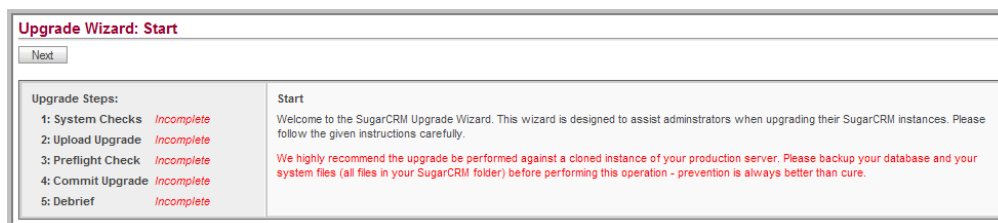
4. To view the file, click the **Download the Diagnostic file** link at the bottom of the page; to delete the file, click the **Delete the Diagnostic file** link.
5. If you choose to download the Zip file, the File Download dialog box displays. To view Zip file contents, click **Open**, and click the file you want to view. To save the Zip file contents, click **Save**, and select a location on your local machine.

## Upgrade Wizard

The Upgrade Wizard provides a quick way to upload and install new Sugar Suite versions as well as upgrade existing ones. Before using the Upgrade Wizard, ensure that the *config.php* file for your installation is writable.

### To upgrade your Sugar Suite application

1. Click the **Upgrade Wizard** option on the Administration page.



The Upgrade Wizard screen displays.

- Click **Next**.

The System Checks screen displays.

If the check finds no errors, the status of System Checks changes from Incomplete to Complete.

- Click **Next**.

The Upload Upgrade screen displays.

Name	Type	Version	Date Published	Uninstallable	Description
SugarPro Patch 4.5.0beta2	Patch	4.5.0beta2	2006-07-27 20:14:33	No	None

- Click **Browse** to navigate to the location of the upgrade zip file and then click **Upload Upgrade**.

If you want to remove the file, click **Delete Package**.

If the upgrade file is loaded successfully, the status of Upload Upgrade changes from Incomplete to Complete.

- Click **Next**.



The Preflight Check screen displays and the Upgrader begins checking queries.

To run customized queries, you can select Manual SQL Queries from the Database Update Method drop-down list, and enter your queries in the field that displays below.

When the check completes successfully, the status of Preflight Check changes from Incomplete to Complete.

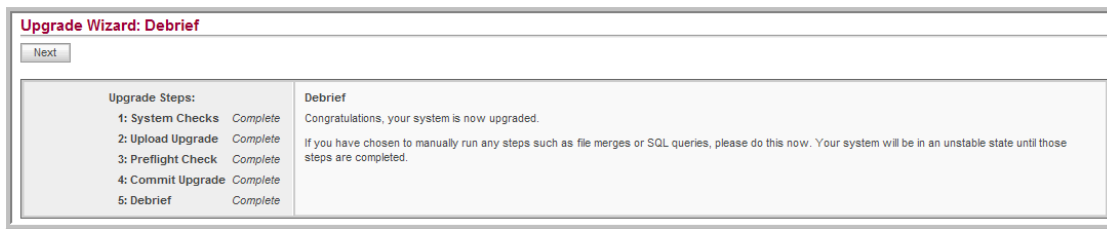
6. Click **Next**.

The Commit Upgrade screen displays and the upload process begins.

When the upgrade is complete, the status of Commit Upgrade changes from Incomplete to Complete.

7. Click **Next**.

The Debrief screen confirms the status of the upgrade.



When the upgrade is successful, the status of Debrief changes from Incomplete to Complete.

## Locale Settings

Use this option to set system-wide default formats for date, time, language and salutation.

### User Interface

**Default Date Format.** From the drop-down list, select a date format for all records such as Accounts. Users can override the default format by setting a different date format in their My Account page.

**Default Time Format.** From the drop-down list, select a time format to display in all records such as Cases. Users can override the default format by setting a different time format in their My Account page.

**Default Language.** From the drop-down list, select the default language for the Sugar Suite User Interface. Users can select a different language from the login page, provided they have installed the appropriate language pack.

**Default Name Format.** Enter the default salutation and name format to display in list views and detail views. You can specify any combination of salutation first name, and last name. For example: Mr. John Smith, Mr. Smith, or John Smith. Users can override the default format by setting a different time format in their My Account page.

To save the settings, click **Save**; To exit the System Settings page without saving your changes, click **Cancel**.

To restore the previous settings, click **Restore**.

### Default Currency

Select this option if you want to override the default currency that you set during installation. Users can override the default currency that you specify on their My Account page.

**Currency name.** Enter the name of the currency that your organization uses to conduct business.

**Currency symbol.** Enter the symbol for the currency.

**ISO 4217 currency code.** Enter the ISO code for the currency.

**1000s separator.** Specify a delimiter to separate thousands when users specify a numeric value for the amount.

**Decimal symbol.** Specify a default decimal symbol.

To save the settings, click **Save**.

To restore the previous settings, click **Restore**; to exit the System Settings page without saving your changes, click **Cancel**.

## Backups

Use this option to backup the Sugar Suite configuration files. Note that this option does not backup the database.

### To backup Sugar Suite configuration files

1. Click the **Backups** option in the System sub-panel on the Admin page.

2. In the Directory field, specify a directory that is writable by the same user as the Apache process.
3. In the Filename field, enter a file name for the Zip file including the .zip extension.
4. To confirm that backup can be performed, click the **Confirm Settings** button.
5. Click **Run Backup** to create the .zip file of your Sugar application files.

**Note:** To backup your database information, refer to your database vendor's documentation.

## Repair

Use this option to upgrade and rebuild data from a previous version of Sugar Suite for the current version of the program.

The upgrade options include:

**Opportunities:** Controls how currency fields within Opportunities are upgraded. This is needed to support an internationalized currency capability, which stores the currency type separately from the amount.

**Upgrade Custom Labels:** Upgrades the format of the custom field labels in every language file.

**Upgrade Studio:** Upgrades Studio to incorporate functionality such as rearranging fields to reconfigure a module's layout.

**Apply Daylight Savings Time Fix:** Updates the time handling functionality for MySQL databases. This step is mandatory.

**Repair Database:** This option is applicable to MYSQL databases only. It repairs your Sugar Suite database based on values defined in Vardefs. You can choose to display the SQL that will be executed on the screen, export SQL to a file, or execute SQL.

**Repair Entry Points:** Run this script if you receive a 'Not A Valid Entry Point' error.

**Clear Chart Data Cache:** Removes cached data files that charts use.

**Rebuild .htaccess file:** Rebuilds *.htaccess* to limit access to certain files directly.

**Rebuild Audit:** Checks and rebuilds the audit table.

**Rebuild Config File:** Rebuilds the *config.php* file by updating the version and adding defaults when not explicitly declared.

**Rebuild Extensions:** Rebuilds extensions including extended vardefs, language packs, menus, and administration.

**Rebuild Relationships:** Rebuilds relationship metadata and drops the cache file.

**Rebuild Schedulers:** Rebuilds your out-of-the box Scheduler jobs.

**Rebuild Dashlets:** Rebuilds the Dashlets cache file.

**Rebuild Javascript Languages:** Rebuilds Javascript versions of language files.

**Repair Roles:** Repairs roles by adding all new modules that support access control as well as any new access controls to existing modules.

**Repair Indexes:** Validates and, optionally, repairs database indexes against definitions in *vardef* files.

## Currencies

Use the **Currencies** option to define currencies other than the US dollar.

The screenshot displays the 'CURRENCIES' management page in SugarCRM. At the top, there's a title bar with 'CURRENCIES' and navigation links like 'Print' and 'Help'. Below this is a table listing current currencies:

Currency Name	ISO 4217 Code	Currency Symbol	Conversion Rate	Status
US Dollar	USD	\$	1.0000000000	Active
Euro	345	EUR	0.9000000000	Active

Below the table, there's a 'CURRENCY' section with a 'Save' button and a 'Clear' button. The form contains the following fields:

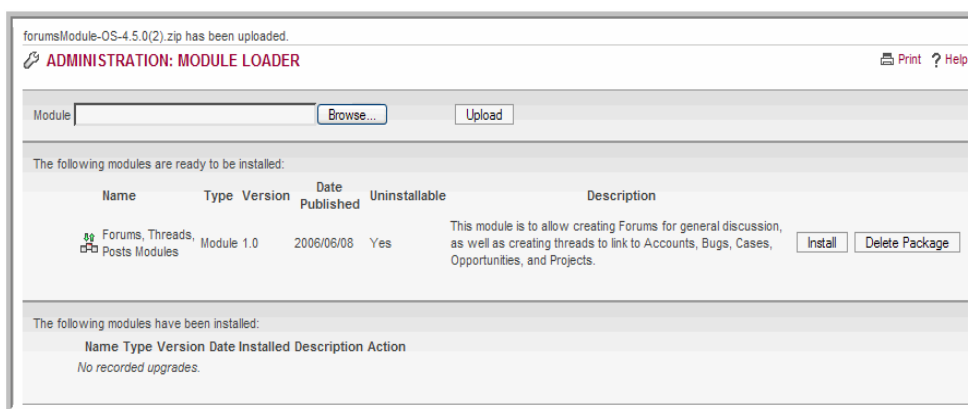
- Currency Name: \*
- Conversion Rate: \*
- Status: \* (with a dropdown menu currently set to 'Active')
- ISO 4217 Code: \*
- Currency Symbol: \*

For each new currency that you define, you must enter the name, symbol (for example, \$), conversion rate to the US \$, and the currency code (such as CDN for the Canadian dollar). Note that each user can select his default currency in the User Management screen.

**Note:** To display the Euro symbol in charts, you will need to install Macromedia Flash8.

## Module Loader

Use the Module Loader to upload custom modules, new language packs, and custom themes so that they are included in the current installation. Custom modules are provided as Zip files. A history of all modules that have been queued and installed displays in the list.



### To install a custom module

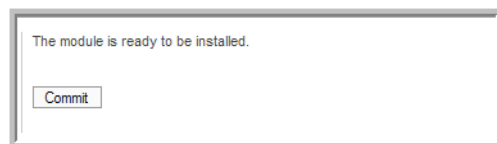
1. In the Upload a module field, enter the path to the module or click **Browse** to navigate to the location of the module .zip file.
2. Click **Upload**.

The system queues the module on the local server for installation.

3. Click **Install** to unzip the module file; to unload the module, click **Delete Package**.

The Module Loader unzips the Module file and displays a message stating that the module is ready to be installed.

4. Click **Commit** to install the module.



If the installation is successful, the system displays a message stating that the module installed successfully.

5. To go back to the Module Loader page, click **Back to the Module Loader**.

The new module is listed on the page.

#### To uninstall a module

1. To uninstall a module, click **Uninstall** on the Module Loader page.  
The system displays a message stating that the module is ready to be uninstalled
2. Click **Commit** to uninstall the module.  
The module is removed from Sugar Suite.

## Users

Use this sub-panel to manage users and roles for your organization.

### User Management

Use the User Management option to create, edit, activate, and deactivate users in Sugar Suite.

You can create an end-user, an administrator, a group user, or a portal-only user.

An *end-user* can access and use Sugar Suite modules but does not have administrative privileges.

An *administrator* has administrative privileges in Sugar Suite to perform tasks such as creating users.

A *group user* is a bucket that you use to collect inbound emails for distribution. A group user is not a real user and, therefore, cannot log into Sugar Suite. You create a group user when you create a group for an inbound email inbox as described in [“Inbound Email” on page 34](#). For example, you can create a group user named Support to handle customer support issues. These tasks can then be distributed to the appropriate users from the group inbox.

A *portal-only user* is a user who can log into portals created in Sugar Suite but cannot log into the Sugar Suite application.

After you create an end-user, administrator, or portal-only user, the user name displays in the users list on the Users Home page and the employees list on the Employees Home page. Group user names display in the users list as group users and does not display in the employees list.

---

**Note:** You cannot delete users but you can deactivate them.

---

#### To create a user

1. In the Users sub-panel of the Administration Home page, click **User Management**.  
The Users Home page displays.

**USERS: HOME** Print ? Help

---

**USER SEARCH**

First Name  Last Name  Department  Status [-None-] Search Clear Advanced Search

---

**USERS**

Export | Selected: 0 Start Previous (1 - 7 of 7) Next End

<input type="checkbox"/>	Name	User Name	Department	Email	Primary Phone	Status	Admin	Group
<input type="checkbox"/>	Administrator	admin				Active	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Jim Brennan	jim		jim@example.com		Active		
<input type="checkbox"/>	Sally Bronsen	sally		sally@example.com		Active		
<input type="checkbox"/>	Max Jensen	max		max@example.com		Active		
<input type="checkbox"/>	Chris Olliver	chris		chris@example.com		Active		
<input type="checkbox"/>	Sarah Smith	sarah		sarah@example.com		Active		
<input type="checkbox"/>	Will Westin	will		will@example.com		Active		

Export | Selected: 0 Start Previous (1 - 7 of 7) Next End

Clear All

---

**MASS UPDATE**

Update

Status [-None-]

## 2. In the Shortcuts menu, click **Create Users**.

**USERS: ()** ? Help

Save Cancel \* Indicates required field

First Name  User Name \*

Last Name \*  Password: \*

Status \* Active Confirm Password: \*

---

**USER SETTINGS**

Administrator ☐ Grants administrator privileges to this user

Group User ☐ Act as a group user. This user cannot login through the Sugar Suite web interface. This user is only used for assigning items to a group via Inbound Email functionality.

Portal Only User ☐ Act as a portal user. This user cannot login through the Sugar Suite web interface. This user is only used for portal web services. Normal users cannot be used for portal web services.

Notify on Assignment ☒ Receive an email notification when a record is assigned to you.

Show gridlines ☐ Controls gridlines on detail views

Display reminder? ☐ Issue a reminder of an upcoming call or meeting

Mail Merge ☐ Enable Mail Merge (Mail Merge must also be enabled by the system administrator in Configure Settings)

Export Delimiter  Specify the character(s) used to delimit exported data.

Import/Export Character Set ISO-8859-1 (Western European and US) Choose the character set used in your locale. This property will be used for data imports, outbound emails, .csv exports, PDF generation, and for vCard generation.

Show Full Name ☐ Display an User's full name instead of their login name

No opportunities ☐ Set this to true if this user will not be assigned opportunities. You should ignore this flag for users, who are not managers, and, not involved in sales activities. Used by forecasting module.

---

**LOCALE SETTINGS**

Date format 2006-12-23 Set the display format for date stamps

Time Format 23:00 Set the display format for time stamps

Time zone America/Los Angeles (GMT-8) (+DST) Set the current time zone

Time zone prompt ☒ Check to prompt user for time zone confirmation on login.

Currency US Dollar: \$ Select the default currency

Currency Significant Digits: 2

Example: \$123,456,789.00

1000s separator  Character used to separate thousands

Decimal symbol  Character used to separate decimal portion

## 3. On the Users page, enter the following information:

- In the top sub-panel, enter the user name, the login name and password, and the user status.

- b. In the **User Settings** sub-panel, select the appropriate box to specify whether the user is an administrator, an end-user, or a group user. You can also specify whether the system should send an email notification to the user when a record is assigned to that person. The system displays the default values for the date and time format, the time zone, and currency values as specified on the **System Settings** page. However, you can change these values for individual users if necessary. You can also specify automatic reminders for upcoming meetings and calls.
- c. The **Locale Settings** sub-panel displays the default values for the date and time format, the time zone, decimal symbol, and currency values as specified on the **System Settings** page. However, you can change these values for individual users if necessary.
- d. In the **User Information** sub-panel, specify the user's employee status, title, department, phone numbers, IM (Instant Messenger) type and ID. You can add comments in the **Notes** field, if necessary.
- e. In the **Address Information** sub-panel, specify the user's home address.
- f. In the **Calendar Options** sub-panel, you can enter a **Publish Key** to prevent others from publishing the user's calendar without authorization.
- g. In the **Edit Tabs** sub-panel, you can limit access to Sugar Suite modules by granting the user access to only specific modules. By default, the user has access to all the modules. To hide a module from the user's view, move the module tab to the **Hide Tabs** list using the **Arrow** buttons. Similarly, to display a module to a user, move it from the **Hide Tabs** list to the **Display Tabs** list.  
  
To apply these settings to all users, move the modules from the **Hide Tabs** list to the **Remove Tabs** list.  
  
To move up a module, select the module in the **Display Tabs** list and click the up arrow; to move down the module, click the down arrow.  
  
Use the **Number of tabs to display** box to specify the maximum number of module tabs to display in the **User Interface**.
- h. In the **Email Options** sub-panel, you can enter the user's email addresses, the user name and address that displays in outbound emails. You can also create or select an existing signature for the user. By default, the email format is **HTML**, but you can change it to plain text format. You can also choose to display email counts.
- i. In the **Outbound Email Settings** sub-panel, select the Mail transfer agent for the user's outbound emails. You can choose either **Sendmail** or **SMTP**.
- j. In the **Inbound Email Settings** sub-panel, you can specify Mail Server information such as its address, protocol, port number, status, user name and password. To ensure that the settings are accurate, click the **Test Settings** button.

Click **Show Advanced** to set the following options:

**Use SSL.** Select this box to use Secure Socket Layer (SSL) when connecting to the mail server.

**Leave Messages on Server.** Select this box to save your inbound messages on the email server instead of the Sugar Suite server.



**Import only since last check.** Select this box to instruct the system to import only email messages that are new since the last time you checked for messages.

---

**Note:** Selecting this option could slow down performance because the server will check every message to ensure that you have not already read it.

---

4. To create the user, click **Save**; click **Cancel** to exit the page without saving your changes.
5. To change the user password, click **Change Password**, enter the new password, and save it.

After you create the user, the system adds the user name to the user list on the Users Home page.

### To manage user information

1. To update the status of some or all users in the Users list, use the Mass Update section on the Users Home page as described in “Editing and Deleting Multiple Records” in the *Sugar Open Source User Guide*.
2. To view a user’s details, click the user’s name in the Users list.
3. To edit user details, on the detail page, click **Edit**, change the information as needed, and click **Save**.
4. To duplicate the user details, on the detail page, click **Duplicate**, edit the information as necessary, and click **Save**.
5. To change the user password, on the detail page, click **Change Password**, enter the new password, and click **Save**.

## Role Management

A role defines a set of privileges to perform specific tasks. You can assign one or more users to a role to enable them to access the appropriate Sugar Suite modules and perform the tasks. For example, you can create a role called Support with privileges to access, read, and write to the Bug Tracker module. Then, users assigned to the Support role are able to access the Bug Tracker module to view and report bugs. You can further specify whether role members can import and export bug information.

Roles have the following characteristics:

- A particular set of privileges can be defined as a role.
- A role takes effect when you assign it to a user.
- You can assign users to more than one role. When a user is assigned to multiple roles, the role with the more restrictive privileges prevails.

All changes to roles such as changing role definitions, granting, or revoking roles to and from users take effect upon new login sessions. When you deny access to a module, the related sub-panels that display on other module pages are also removed.

### To create a role

1. In the Shortcuts menu of the Role page, click **Create Role**.

**ROLES:** Save Cancel ? Help

Name:

Description:

Double click on a cell to change value.

	Access	Delete	Edit	Export	Import	List	View
Accounts	Default	Default	Default	Default	Default	Default	Default
Bug Tracker	Default	Default	Default	Default	Default	Default	Default
Calls	Default	Default	Default	Default	Default	Default	Default
Campaigns	Default	Default	Default	Default	Default	Default	Default
Cases	Default	Default	Default	Default	Default	Default	Default
Contacts	Default	Default	Default	Default	Default	Default	Default
Documents	Default	Default	Default	Default	Default	Default	Default
Email Marketing	Default	Default	Default	Default	Default	Default	Default
Emails	Default	Default	Default	Default	Default	Default	Default
Email Templates	Default	Default	Default	Default	Default	Default	Default
Forums	Default	Default	Default	Default	Default	Default	Default
Leads	Default	Default	Default	Default	Default	Default	Default
Meetings	Default	Default	Default	Default	Default	Default	Default
Notes	Default	Default	Default	Default	Default	Default	Default
Opportunities	Default	Default	Default	Default	Default	Default	Default

2. Enter a name for the role.

All the Sugar Suite modules along with the associated properties and actions are listed below in table format. You use this table to disable/enable modules or grant/deny permissions to perform specific actions.

3. To specify access to a module, double-click the **Access** field corresponding to that module, and from the drop-down list, select **Enabled**; to deny access to the module, select **Disabled**.
4. To specify the user type, double-click the **User Type** field corresponding to the module, and select **Normal** (for End-user) or **Admin** (for Administrator).
5. To allow a specific privilege for a module, such as editing or deleting records, double-click the appropriate **Action** field corresponding to the module, and select one of the following:

**All:** allows all users of the specified user type to delete a item in the module.

**Owner:** allows only item owners to delete the item.

None. Prevents all users of the specified user type from deleting records in the module.

Privileges are as follows:

- **Delete:** Delete records in the module. If None is selected, the Delete button is disabled on the Detail page.
  - **Edit:** Edit records in the module. If None is selected, the Edit button is disabled on the Detail page. Additionally, the user cannot use the Mass Update section to update records for the module.
  - **Export:** Export item data in the module. The Export link located at the top of List views is removed when this privilege is not available to the user.
  - **Import:** Import item data in the module. The Import link in the navigation bar does not appear when this privilege is not available.
  - **List:** List views of records in the module. The user is unable to access the module's list view when this privilege is not available.
  - **View:** View records in the module.
6. To create the role, click **Save**; click **Cancel** to exit the page without saving your changes.

Now, you need to assign users to the role.

#### To assign users to a role

1. On the Roles home page, click the name of the role to view associated access permissions in Sugar Suite.
2. Scroll down the Detail page to view the Users sub-panel, and click **Select**.
3. Select users from the Users list and click **Select**.

The system assigns the selected users to the role.

You can also assign users to a role in the User Settings sub-panel of the User Management page.

#### To manage roles

1. To view the role details, click the role name on the Role home page.
2. To edit the role, on the Detail page, click **Edit**, revise the information, and click **Save**.
3. To duplicate the role, on the Detail page, click **Duplicate**, and then click **Save**.
4. To delete the role, on the Detail page, click **Delete**.
5. To view access permissions for a specific user, in the Shortcuts menu, select List Roles by User and select the user from the adjacent drop-down list.
6. To remove a user, in the Users sub-panel, click the **Rem** icon corresponding to the user name.

#### To view roles for a user

1. In the Shortcuts menu of the Roles home page, click **List Roles by User**.

2. Select the user from the drop-down list.

The system displays details of the user's privileges for each module. You cannot changes any of the privileges because they are associated with the role.

## Email

Use this sub-panel to manage outbound and inbound emails for your organization. For more information on emails, see the *Sugar Open Source User Guide*.

### Email Settings

Use this option to set the default settings for outbound emails.

This includes the following:

- Default notification settings that specify the “From” name and address for notification emails that you send your users when you assign an item record to them.
- The defaults for the Mail Transfer Agent, email format, and the email client for outbound emails.
- The number of mass campaign emails dispatched per batch, and the location of campaign tracking files.

For information on campaigns, see the *Sugar Open Source User Guide*.

#### To configure email settings

1. In the Email Notification Options sub-panel, enter information for the following fields:
  - “**From**” **Name**. Enter the name of the sender.
  - “**From**” **Address**. Enter the sender’s address.

**Notifications on?** Select this option to send email notifications to users when an item record is assigned to them.

**Send Notifications by default for new users?** Select this option to send an email notification to new users when you create their record in the User Management page.

**Send Notifications from assigning user's email address?** Select this option to send notifications from the email address of the user when responding to an assigned task.

**Mail Transfer Agent.** From the drop-down list, select the Mail Transfer Agent for your outbound emails. You can select either Sendmail or SMTP.

2. In the User Email Defaults sub-panel, select the following information:

**Compose email messages in this format:** Select HTML email or Plain Text Email from the drop-down list.

**Compose email using this client:** The default is the SugarCRM mail client, but you can select an external mail client such as Microsoft Outlook.

**Compose email messages in this character set:** Select the appropriate character set from the drop-down list. The default character set is ISO-8859-1.

3. In the Outbound Email Options sub-panel, enter the following information:

**Number of emails sent per batch:** Enter the number of campaign emails you want to send out every batch.

**Location of campaign tracking files:** Specify the location of the campaign tracking files. By default, the system uses value specified for the `site_url` parameter in the `config.php` file.

4. To save your email settings, click **Save**; click **Cancel** to exit the page without saving your changes.

## Manage Email Queue

Use this option to view, send, and delete mass campaign emails that are in the queue for dispatch. The system sends out the email only after the Start date/time has passed. After a campaign email has been processed, you can view its status in the Campaign module. The system tracks statistics such as the send date and number of times an email delivery was attempted.

Use the Scheduler to run nightly mass email campaigns as well as monitor bounced campaign emails. For more information on scheduling email mailings, see [“Scheduler” on page 11](#).

**OUTBOUND EMAIL QUEUE MANAGEMENT** Print ? Help

**QUEUE SEARCH**

Campaign:  Recipient Name:  Recipient Email:  Search Clear

Send Queued Campaign Emails

**QUEUE**

Campaign	Recipient Name	Recipient Email	Marketing Message	Send On	Send Attempts	In Process
<input type="checkbox"/> NewProductCampaign	Jim smith		email marketing1	2006-08-29 12:00	0	0

Clear All

Delete

### To manage queued emails

1. To send out campaign emails, select the campaign in the Queue sub-panel below and click Send Queued Campaign Emails.  
You can select more than one campaign at a time.
2. To delete campaign emails, select the campaign in the Queue sub-panel below and click Delete; click OK to confirm the deletion.
3. To search for a specific campaign, enter the campaign name, or recipient name, or recipient address in the Search fields above and click Search; click Clear to clear the search fields.

## Inbound Email

Use this option to monitor and manage emails that your organization receives. You can create mailboxes, such as *support@example.com* or *sales@example.com*. For each mailbox, you can set up an action such as Create Bug and assign it to a specific group.

A group is a bucket to collect and distribute emails to one or more users. To create a group, you need to create a group user as described in [“Users” on page 26](#). If you do not assign a specific group to a new mailbox, the system automatically creates one for you.

When your organization receives emails that do not reference existing Sugar records, you can route them to a mailbox that is assigned to a specific group. You can parse these emails and associate them with the appropriate Sugar records. For example, you can associate an email with a case ID. You can subsequently distribute emails in the group mailbox to specific individuals. You have two options to distribute the email records: round-robin or least-busy. You can assign a single email or all emails by using the “Only Checked” and “All Search Results” options.

You can schedule a job to periodically monitor these mailboxes for new emails and distribute them. For more information on scheduling jobs, see [“Scheduler” on page 11](#).

When you click the Inbound Email option on the Administration Home page, the following screen displays.

The Case Macro field links an email with a specific case number. When users send an email from the detail page of a case, the case number appears in the Subject field of the email. To customize the subject line, you can replace “CASE” with any text of your choice.

### To set up a new mailbox for inbound emails

1. In the Shortcuts menu of the Inbound Email home page, click **Monitor New Mailbox**.

2. In the Basic Setup sub-panel, enter information for the following fields:
  - Name.** Enter the user’s name, or an alternate name for the mailbox.
  - Mail Server Address.** Enter the address of the mail server.
  - Mail Server Protocol.** From the drop-down list, select either IMAP or POP3.
  - Mail Server Port.** Enter the server port number.
  - Status.** From the drop-down list, select the user status.
  - User Name.** Enter the user name.

**Password.** Enter the user password.

**Use SSL.** Select this box to use Secure Socket Layer (SSL) when connecting to the mail server.

**Leave Messages on Server.** Select this box to save your inbound messages on the email server instead of the Sugar Suite server.

**Import only since last check.** Select this box to instruct the system to import only email messages that are new since the last time you checked for messages.

3. In the Email Handling Options sub-panel, enter information for the following fields:

**Possible Actions.** From the drop-down list, specify the action that the user is permitted to perform. To permit all actions, select Create [Any].

**Assign To Group.** From the drop-down list, select an existing email group or elect to create a group when you save the inbox.

**Auto-Reply Template.** From the drop-down list, select an existing email template.

**“From” Name.** Enter the name of the user who is sending out the email.

**“From” Address.** Enter the email address of the user.

**No Auto-reply to Domain.** To exclude a domain from receiving the automatic email response, enter the domain name.

### **To manage monitored mailboxes**

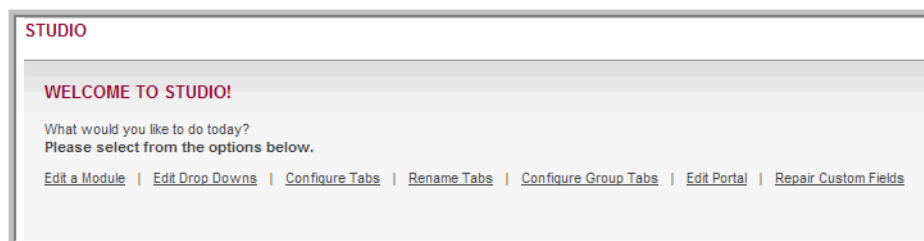
1. To view a mailbox’s details, click its name in the Inbound Email home page.
2. To edit the mailbox details, on the Detail page, click **Edit**, revise the information, and click **Save**.
3. To duplicate the mailbox, on the Detail page, click **Duplicate**.
4. To delete the mailbox, click **Delete**; to delete multiple mailboxes, select them on the Inbound Email home page and click **Delete**.



## Studio

This section describes the various settings associated with the user interface such as field layout, editing, and tab configuration.

The Studio editor enables you to edit drop-down lists, custom fields, layouts, and labels in Sugar Suite modules.



You can select from the following options:

**Select Module.** Select this option to reconfigure a specific module.

**Edit Drop Downs.** Select this option to edit or create a drop-down list.

**Configure Tabs.** Select this option to hide and display module tabs.

**Rename Tabs.** Select this option to rename module tabs.

**Configure Group Tabs.** Select this option to group module tabs.

**Edit Portal.** Select this option to create and manage portal sites.

**Repair Custom Fields.** Select this option to repair custom fields.

Users can use their My Account page to override some of the configurations that the administrator makes in Studio. For more information, see “Setting Your Preferences” in the *Sugar Open Source User Guide*.

## Editing a Module

You can edit a module’s layout, drop-down lists, custom fields, or history. The process of editing a module is as follows:

1. Select a module.
2. Select the action that you want to take. You can choose from the following:

**Edit Layout:** Select this option to rearrange the fields and panels on the screens available in detail view or edit view. For more information, see “[Editing the Layout](#)” on page 38.

**Edit Custom Fields:** Select this option to edit and create a custom field. You can also clean the custom field cache. For more information, see “[To add custom fields](#)” on page 39.

**Edit Drop Downs:** Select this option to edit and create drop-down lists. For more information, see “[Creating and Managing Drop-down Lists](#)” on page 40.

## Editing the Layout

You can rearrange the fields and panels on the pages available within Sugar Suite, to customize them to fit your needs.

Begin by selecting the name of the file to customize. This can be a specific view from one of the system's modules, such as the detail view or the edit view. When you select a view, its field layout displays. You can click and drag a field to a different location within the layout.

The Shortcuts menu displays options to navigate back to the Studio wizard or to continue with the last task you performed using the wizard.

Below the Shortcuts menu, a Toolbox menu provides a workspace to add new fields and labels to a screen, to temporarily hold records that have been removed from a screen, and to discard records which are not needed.

The buttons above the page layout provide options to add custom fields or additional rows to existing fields. You can also undo revisions or redo revisions as needed. You can also view the revision history, preview the specific revision and compare it with the current layout. You can restore or delete a previous revision, if necessary.

### To edit the field layout

1. Select Edit Layout.
2. From the Layouts options, select the file that you want to edit. Choose **EditView** to revise the edit view; choose **DetailView** to revise the detail view; choose **ListView** to revise the list view.
3. To edit a field name, click within the field, select its name, and enter the new name.
4. To move a field to a different location, point your cursor at the field name, hold down the mouse button, and drag it to the desired location on the page.
5. To add a custom field, click the **Add Custom Field** button and follow the process described in [“To add custom fields” on page 39](#).
6. To add additional fields, click the **Add Rows** button.
7. To delete a field, drag it to the trash can in the Toolbox located below the Shortcuts menu.
8. To remove a field, drag it to the Sugar Fields staging area in the Toolbox.
9. To view fields of a specific type, select the type from the drop-down list in the Toolbox and view the fields below the drop-down list.
10. To revert to the previous revision, click **Undo**.
11. To redo the revision, click **Redo**.
12. To save your changes, click **Save**.
13. To save and publish the new layout, click **Save & Publish**.
14. To view a previous version, click **History**.

For more information on History, see [“Viewing and Managing Revisions” on page 42](#).

## Creating and Managing Custom Fields

You can add custom fields to any module in Sugar Suite. First, select the module in which you want to add or edit custom fields. Then you can define the field properties. After creating a new field, you can view and edit its properties. You can also clear the custom field cache.

### Exporting Custom Fields

You can migrate custom fields from one server to another. Before importing a new custom field structure, it is recommended that you export the current custom field structure as a backup. When you import a custom field structure, details display to describe what changes is made to the database. If you agree with the changes, click the Execute non-simulation mode link. Importing removes any previously defined custom field structures that are not defined in the imported .sugar file as well as any data stored in those custom fields. If you want to revert the import process, import the backup version of the structure you exported.

### To add custom fields

1. To add a new custom field, select Edit Custom Fields on the Edit a Module page.
2. Select Create Custom Field. Alternatively, on the Edit Layout page, click the **Add Custom Field** button.

3. Enter values for the following:

**Data Type.** From the drop-down list, select the data type such as Text, Email, or DropDown.

**Field Name.** Enter the field name that is stored in the database.

**Field Label.** Enter a field name that displays in the Sugar Suite user interface.

**Help Text.** Enter descriptive text for the field. This text displays when the user points the cursor at the field.

**Default Value.** Enter a default value for the field, if necessary.

**Max Size.** Enter the maximum number of characters that the field can contain.

**Required Field.** Check this box to specify that users must enter a value for the field.

**Audit?** Check this box to display field values when a user clicks the View Audit Log link.

**Duplicate Merge.** From the drop-down list, specify whether the functionality to merge duplicate records has been disabled, enabled, in filter, or default selected filter.

4. Click **Save** to create the field.

#### **To edit custom fields**

1. In the Studio wizard, select Edit a Module and then select the module.
2. Select Edit Custom Fields.
3. Select View Custom Fields.
4. Select the field from the list.

The Custom Field Editor displays the field properties.

5. Edit the properties as needed and click **Save**.

#### **To clear custom field cache**

1. In the Studio wizard, select Edit a Module and then select the module.
2. Select Edit Custom Fields.
3. On the Custom Field Editor page, select Clear Cache.

The system clears the custom field cache.

## **Creating and Managing Drop-down Lists**

Every module displays at least one drop-down list consisting of several values that users can choose from. For example, when users create an account, they can choose a specific industry type and an account type from their respective drop-down lists.

As the administrator, you can create and edit values in all of the drop-down boxes in the system to suit your organization's needs. You can also create new drop-down lists.

#### **To create a drop-down list**

1. In the Studio wizard, select Edit Drop Downs.
2. On the Drop Down Editor page, select Create a Drop Down.

The fields to create a new drop-down list display below.

3. Enter values for the following fields:
  - Dropdown Name.** Enter a name for the drop-down list.
  - Dropdown Language.** Select the language to display the list. The languages that are available to you depends on the language packs that you installed.
  - Database Value.** Enter the database value to which you are mapping the drop-down list value.
  - Display Value.** Enter the value that you want to display in the drop-down list.
4. To create a new mapping, click the + button.
5. To remove a mapping, click the **Delete** icon.
6. To edit a mapping, click the **Edit** icon.
7. To undo a previous action, click **Undo**.
8. To repeat the previous action, click **Redo**.
9. To save the value, click **Save**.

### To manage a drop-down list

1. On the Drop Down Editor page, select Edit Dropdowns.  
The system displays the mapping between the database keys and drop-down list values for that module.
2. To edit a value, click the corresponding **Edit** icon in the Display Value column and make your changes.  
The system displays the mapping between the database keys and drop-down list values for that module.
3. To edit a value, click the corresponding **Edit** icon and make your changes.
4. To add a new value, in the fields below enter the database key and the corresponding value, and click the + button.
5. To undo a previous action, click **Undo**.

6. To repeat the previous action, click **Redo**.
7. To save your changes, click **Save**.

## Viewing and Managing Revisions

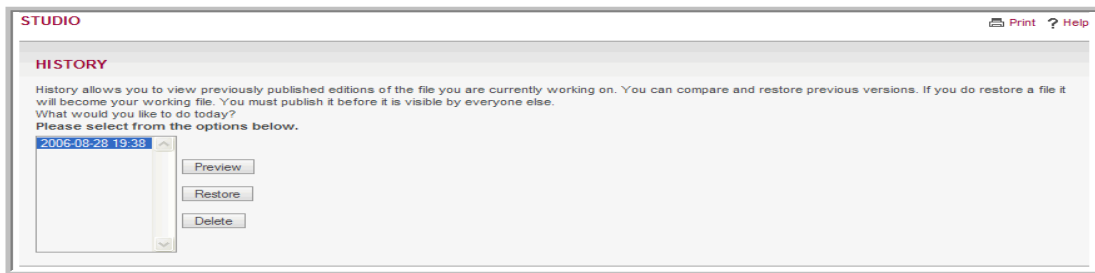
After you save and publish the changes you make to a module in Studio, you can view the revision history to perform any of the following actions:

- Preview the changes you made
- Compare the current version to the previous version
- Restore the previous version
- Delete the new version that you created.

### To view and manage revisions

1. Click History and click OK to confirm your action.
2. On the History page, select a date to view changes made in that particular revision.

The following screenshot displays the timestamps when changes were made to the EditView of the Accounts module.



3. To preview a change, select the timestamp and click **Preview**.  
When you click preview, the revised page displays below.
4. To compare the changes with a previous version of the page, select the appropriate timestamp and click **Compare**.

**STUDIO**

**HISTORY**

History allows you to view previously published editions of the file you are currently working on. You can compare and restore previous versions. If you do restore a file it will become your working file. You must publish it before it is visible by everyone else. What would you like to do today?  
Please select from the options below.

2006-08-28 21:10  
2006-08-28 19:53

Preview  
Compare  
Restore  
Delete

---

**ACCOUNTS:** [Print](#) [Help](#) **ACCOUNTS:**

Notice: Undefined index: record in /var/www/html/os450/include/DetailView/DetailView.php on line 234

**View Change Log**

Account Name:	name	Phone:	phone_office
Website:	website	Fax:	phone_fax
Ticker Symbol:	ticker_symbol	Other Phone:	phone_alternate
Member of:		Email:	email1
Employees:	employees	Other Email:	email2
Ownership:	ownership	Rating:	rating
Industry:	Apparel	SIC Code:	sic_code
Type:	Analyst	Annual Revenue:	\$annual_revenue
		Last Modified:	date_modified by
Assigned to:		Date Created:	date_entered by

Notice: Undefined index: record in /var/www/html/os450/include/DetailView/DetailView.php on line 234

**View Change Log**

Account Name:	name	Phone:	phone_office
Website:	website	Fax:	phone_fax
Ticker Symbol:	ticker_symbol	Other Phone:	phone_alternate
Member of:		Email:	email1
Employees:	employees	Other Email:	email2
Ownership:	ownership	Rating:	rating
Industry:	Apparel	SIC Code:	sic_code
Type:	Analyst	Annual Revenue:	\$annual_revenue
		Last Modified:	date_modified by
Assigned to:		Date Created:	date_entered by

- To restore a version, select the appropriate timestamp and click **Restore**; to delete a change, select the timestamp and click **Delete**.

## Configuring Module Tabs

By default, all the module tabs are displayed when a user logs into Sugar Suite. However, you can choose which module tabs to display when users log into Sugar Suite. You can also choose the order in which these tabs are arranged in the Sugar Suite user interface.

By default, users can also configure module tabs on their My Account page. However, the user cannot add back module tabs that the administrator removed from the system. Administrators can unselect the Allow users to configure tabs check box if they do not want users to make any changes.

**Note:** You cannot hide the Home tab.

### To configure module tabs

- In Studio, select Configure Tabs.  
The Configure Tabs page displays all the tabs in the Display Tabs list.
- To hide a tab, select it in the Display Tabs list and, using the Right arrow (>) button, move it to the Hide Tabs list.
- To rearrange the order in which the tabs are displayed, use the Up and Down arrows.
- To disallow users from configuring the tabs, deselect the Allow users to configure tabs option.
- Click **Save** to save the configuration; click **Cancel** to exit the page without saving your changes.

## Renaming Tabs

You can rename the module tabs that display in Sugar Suite.

### To rename tabs

1. In Studio, select **Rename Tabs**.

The tab labels and the corresponding database table keys display. From the three drop-down lists displayed above the tab labels, you can select the module, a corresponding drop-down list, and the language to display the tab.

2. To view all the available drop-down lists in the system, select **All** from the drop-down list above the **Database Key** column, and select a list from the adjacent drop-down list.

To view a drop-down list that is specific to a module, select the module from the drop-down list above the **Database Key** column and then select one of the related lists from the adjacent drop-down list.

3. Click the label that you want to edit and replace it with the new value.
4. Click **Save** to save your changes; click **Undo** to revert to the previous value; click **Redo** to go back to your change.

## Configuring Group Tabs

By default, the system displays individual module tabs when users log into Sugar Suite. However, you can use the **Configure Group Tab** option to organize these individual tabs under group tabs. For example, you can group contacts, leads, and opportunities under Sales and cases, bug tracker, and products under Support. You can add the same module to multiple group tabs. For example, Contacts can be part of Sales as well as Marketing. When users click a group tab, they can access the module tabs associated with it.

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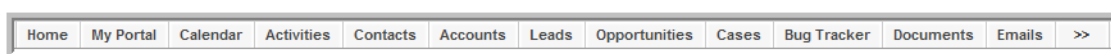
**Note:** Only the Sugar theme supports the **Configure Group Tab** option.

---

By default, the system provides following group tabs:

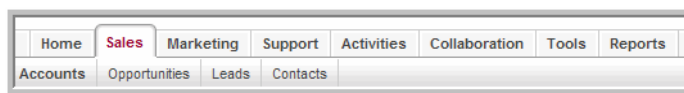
- Home
- Sales
- Marketing
- Support
- Activities
- Collaboration
- Tools
- Reports

The following screenshot illustrates individual module tabs.





The following screenshot illustrates group tabs and the module tabs grouped under the Sales group tab.



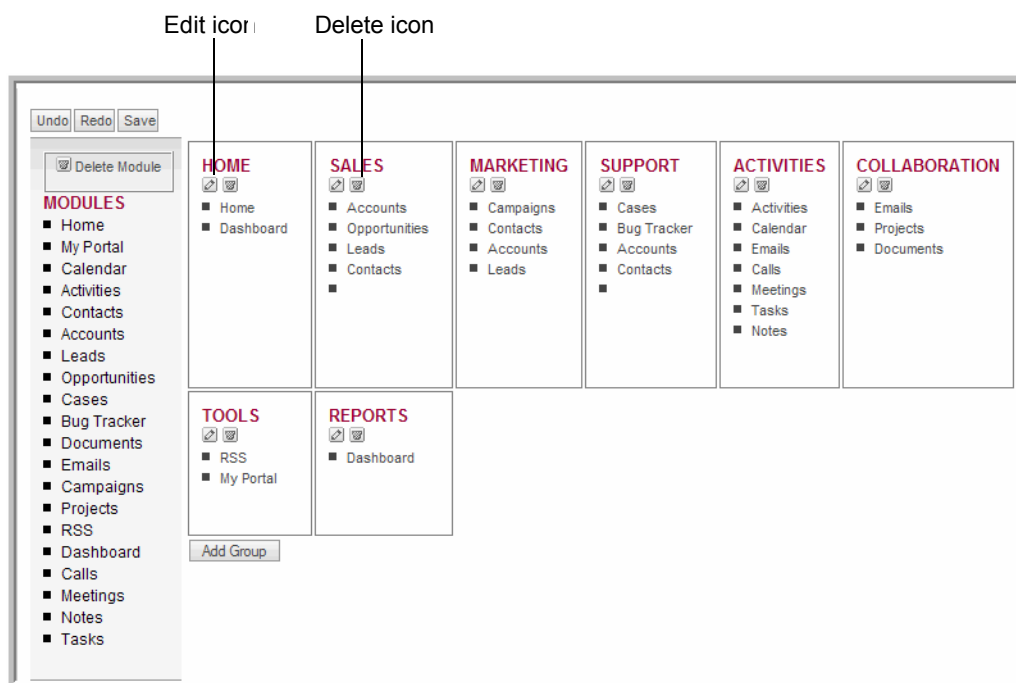
You can change the labels for any of these tabs and also add new group tabs, if needed.

Users have the ability to change to grouped tab or ungrouped tab configuration on their My Account page.

### To configure and manage group tabs

1. In Studio, click **Configure Group Tabs**.

The default group tabs display on the page. The associated module tabs are listed below each group tab:



2. To edit the name of a group tab, click the **Edit** icon, enter the new name in the text field, and click **Save**.

The group tab displays the new name.

3. To remove a module tab from a group tab, place the cursor on the name and drag it to the **Delete Module** box on the left.

The module no longer displays under the group tab.

4. To add a module to a group tab, select it from the **Modules** list on the left, drag it, and place it just below the **Edit** and **Delete** icons.

Under a group tab, you can rearrange the order of the module tabs by selecting a tab name and dragging it to a different location in the list.

5. To undo your last action, click **Undo**.

6. To repeat your last action after you undo it, click **Redo**.
7. To save your changes, click **Save**.

#### To add a new group tab

1. Click **Add Group**.  
A New Group box displays on the page.
2. To name the new group tab, click the **Edit** icon, enter the name in the text field, and click **Save**.
3. To add a module tab under the new group tab, select it from the Modules list and drop it below the Edit and Delete icons.
4. Click **Save**.  
The new group tab displays on the page.

## Creating and Managing Portals

Adding portal sites in Sugar Suite enables the system to provide a single interface for multiple applications and Web sites. You can add new module tabs that can link to any Website you choose, thus enabling Sugar Suite to become a single interface focus for its users. This is commonly used to include emails, forums, or other Web-based applications.

A portal site can be either of two types: Personal or Global. While both administrators and users can create portals, there are some differences that are noted below:

- Users can only create personal portals that are not shared with other users, while administrators can create both personal and global portals. Global portals can be viewed by all users in the organization.
- Users can display portal sites only in the Shortcuts menu, but administrators can display portals as a tab and in the Shortcuts menu.
- Any personal portal that a user creates is listed on the administrator's Portal Home page, but an administrator's personal portal is not listed on users' Portal Home page.

For information on creating a portal, see the *Sugar Open Source User Guide*.

## Bug Tracker

Use this sub-panel to maintain a list of releases for your product. This list will be available in the Release drop-down box that is displayed when reporting a new bug in the Bug Tracker module.

#### To create a release

1. On the Admin Home page, click **Releases** in the Bug Tracker sub-panel.

2. On the Releases Home page, click **Create**.

3. In the Release sub-panel that displays below the list, enter information for the following fields:
  - Release Version.** Enter the version number of the release.
  - Status.** From the drop-down list, select Active to display the name in the Release drop-down list.
  - Order.** Enter a number to specify the order in which the release is displayed in the drop-down list.
4. To add the release to the list, click **Save**.
5. To add another release to the list, click **Save and Create New**.



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