



# Sugar Offline Client Installation Guide

Version 4.2.1

Sugar Suite™ *Sugar Offline Client Installation Guide*  
Version 4.2.1, 2006

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# Table of Contents

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Overview .....	1
Installation Prerequisites .....	2
Installing the Sugar Offline Client .....	4
Step 1: Run the Sugar Offline Client Installer .....	4
Step 2. Synchronize Application Files and Data Between the Server and the Client .....	8
Installing Sugar Offline Client with Existing WAMPStack.....	9
Managing the Sugar Offline Client .....	10



# Installing Sugar Offline Client

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This guide describes how to install and manage the Sugar Offline Client.

Topics include:

- [“Overview” on page 1](#)
- [“Installation Prerequisites” on page 2](#)
- [“Installing the Sugar Offline Client” on page 4](#)
- [“Installing Sugar Offline Client with Existing WAMPStack” on page 9](#)
- [“Managing the Sugar Offline Client” on page 10](#)
- [“Frequently Asked Questions” on page 12](#)

## Overview

The Sugar Offline Client enables users and administrators to use the Sugar Suite application on their local machines without connecting to the Sugar Suite server. This allows users to work in locations where it is not possible to access the Sugar Suite server. They can then synchronize the data on their PC with the data on the Sugar Suite server to make the updated information available to all users in the organization.

The Sugar Offline Client, supported on Microsoft Windows platform, supports the following subset of Sugar Suite modules:

- Home
- Calendar
- Activities
- Accounts
- Contacts
- Emails
- Leads
- Opportunities
- Quotes
- Products
- Forecasts

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**Note:** You cannot send emails or log audit operations through the offline client. The server performs these operations during data synchronization.

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While working with the offline client, it is strongly recommended that you synchronize data with the server frequently to ensure that the server and the client are both populated with the latest data.

During synchronization, there is a possibility of conflict between the data on the offline client and the server. For example, one user may change a phone number for an account and another

user may change the address for the same account. These changes could conflict with each other during synchronization because one set of data will have to be overwritten by the other, resulting in loss of any updated information. Therefore, the user needs to specify one of the following options:

- Always overwrite the server version.
- Always overwrite the client version.
- Decide at the time of the conflict whether to overwrite the server version or not.

With the third option, which is the default, the system displays all the fields that were revised by users. An offline user can then decide on the best course of action.

Typically, most organizations override the client version with the server version because there are more online users and hence, the server version is more frequently updated.

Every time you synchronize data, the system prompts you to select one of the following:

Prompt: Select this option if you want to be prompted for a decision when a conflict occurs.

Server Wins: Select this option if you want the data on the server to overwrite the data on your machine.

Client Wins: Select this option if you want the data on your machine to overwrite the data on the server.

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**Note:** To avoid conflicts, it is recommended that you frequently synchronize data.

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## Installation Prerequisites

In order to allow a Sugar Suite user to log into the Sugar Offline client after installing it, the administrator must complete the following tasks in Sugar Suite:

1. Specify the number of Sugar Offline Client licenses purchased for your organization.
2. Enable the user as a Sugar Offline Client user.

After a user completes installation and data synchronization, the Offline Client instance along with the user name displays in the list of Offline Clients. The administrator can manage Offline Client instances from this page. For more information, see [“Managing the Sugar Offline Client” on page 10](#).

### To specify the number of Sugar Offline Client licenses

1. Log into Sugar Suite as an administrator and click the Admin link at the top right-hand corner of the page.

- In the Sugar Network sub-panel, click **License Management** to view the License Properties page.

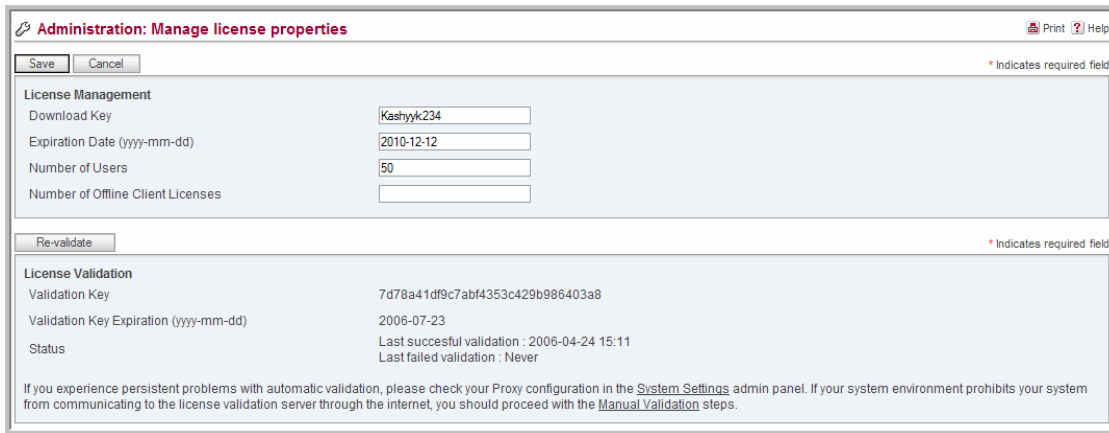
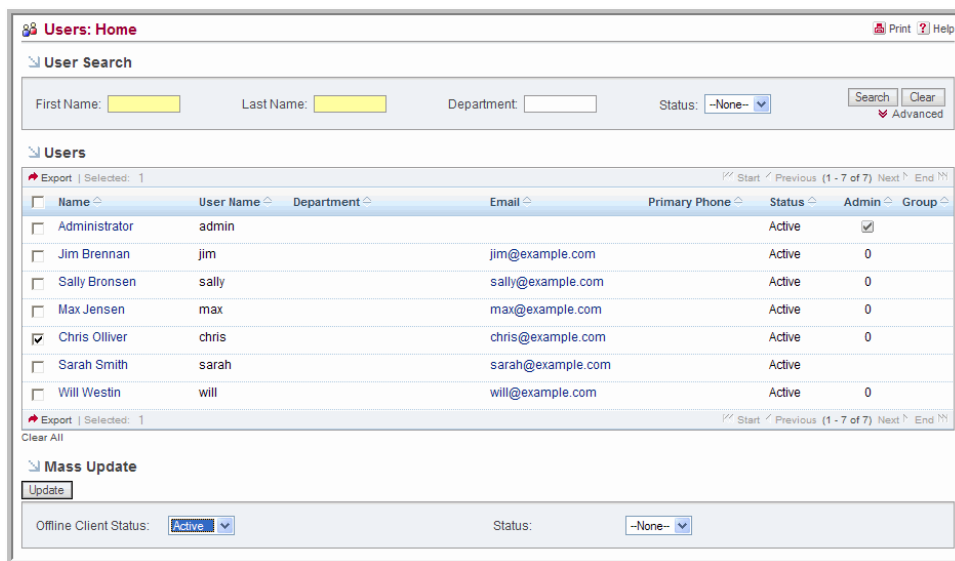


Figure 1 License Management Page

- In the License Management sub-panel, click **Edit** and in the Number of Offline Client Licenses field, enter the number of Sugar Offline Client users in the organization.
- Click **Save** to update the information.

**To enable the Sugar Offline Client user**

- Log into Sugar Suite as an administrator and click the Admin link at the top right-hand corner of the page.
- In the Users sub-panel, click User Management to view a list of current users.
- Select the name of the user that you want to enable as a Sugar Offline Client user.
- In the Mass Update sub-panel, select **Active** from the Offline Client Status drop-down list, and click **Update**.



Alternatively, click the user name in the Users list and in the detail page, click **Edit** and scroll down the user’s detail page to the User Settings sub-panel.

5. In the User Settings sub-panel, from the Offline Client Status drop-down list, select **Active**.
6. Click **Save** to update the information.

## Installing the Sugar Offline Client

If you are installing the Sugar Offline Client for the first time, you can use the Sugar Offline Client installer to install the WAMPStack (Windows, Apache, MySQL, and PHP). The Sugar Offline Client installer, designed for MS Windows versions 2000, 2003, and XP, contains the following components:

- Apache: version 2.0.55
- MySQL: version 5.0.22
- PHP: version 4.4.3

If you already have a WAMP stack from an older version of the Sugar Offline Client, see [“Installing Sugar Offline Client with Existing WAMPStack”](#) on page 9.

The process of using the Sugar Offline Client installer is as follows:

1. Run the Sugar Offline Client installer.
2. Synchronize application files and data to populate information from the server to the client.

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**Note:** The Sugar Offline application that is installed on the client must be the same edition and version as the Sugar Suite application on the server.

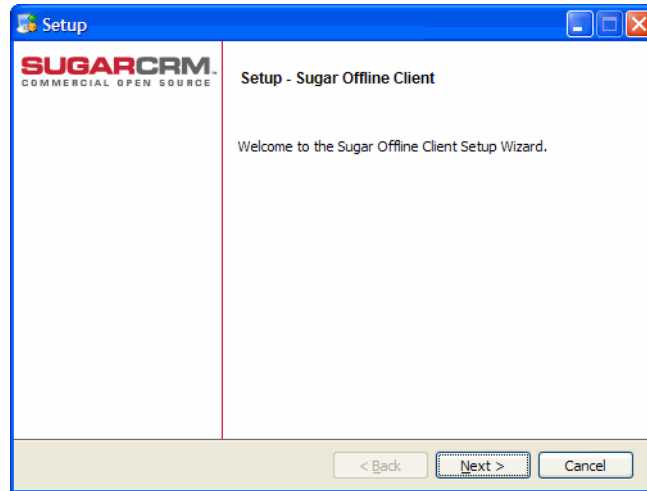
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### Step 1: Run the Sugar Offline Client Installer

Run the Sugar Offline Client installer for the appropriate Sugar Suite server. If your server is running the Sugar Enterprise application, install the *sugarcrm-Offline Client - 4.2.1-ENT-windows-installer.exe*. If your server is running the Sugar Professional application, install the *sugarcrm-Offline Client - 4.2.1 PRO-windows-installer.exe*.

1. Browse to the location of the *sugarcrm-OfflineClient-4.2.1-ENT-windows-installer.exe* file and double-click it to begin the installation process

The following screen displays.

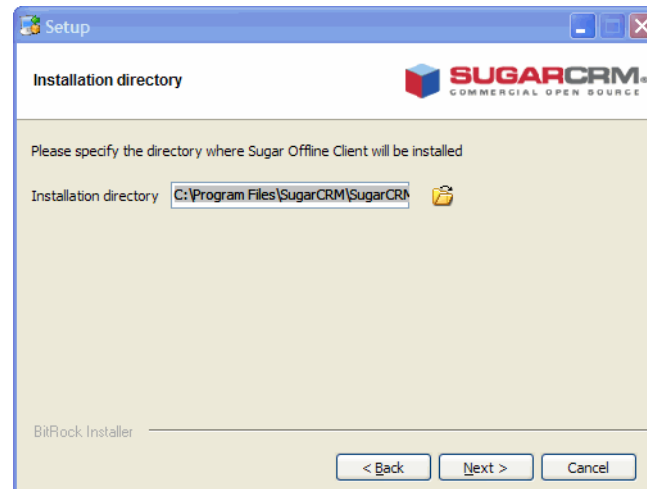


2. Click **Next**.

The License Agreement window displays.

3. Accept the agreement and click **Next**.

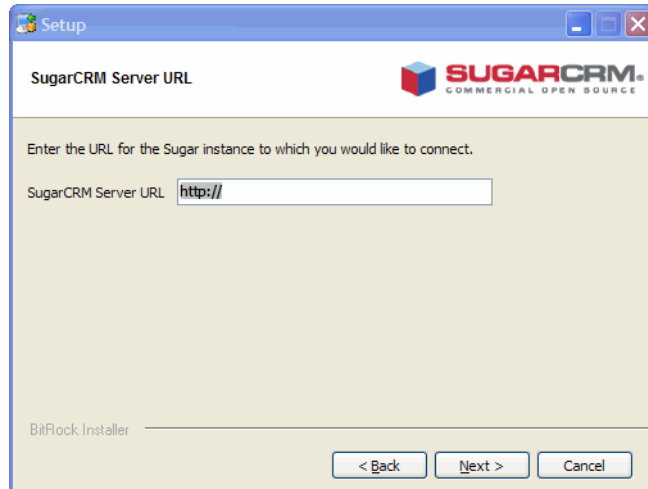
The Installation Directory window displays.



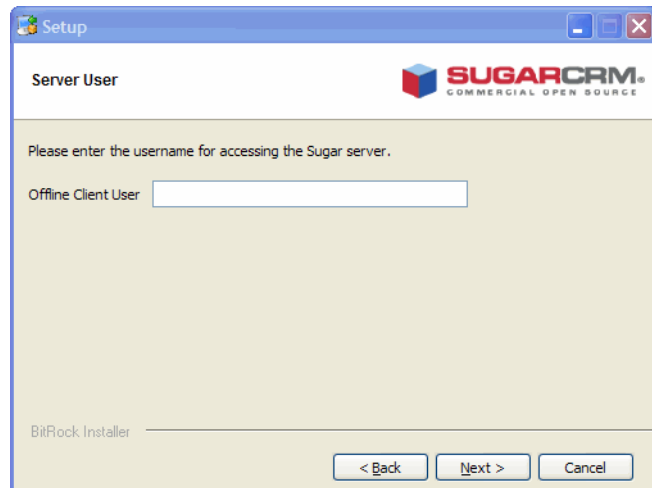
4. Accept the default location or enter a new location and click **Next**.

The installer searches for the default MySQL database port (3306), Web Server port (80), and the SSL port number (443). If those ports are available, the installer uses them to set up MySQL and Apache. However, if there is a conflict because those ports are currently being used, the installer displays the DB Port window, the Web Server Port window, and the SSL Port window in succession.

Enter a different port number for each and click **Next** until the SugarCRM Server URL window displays.

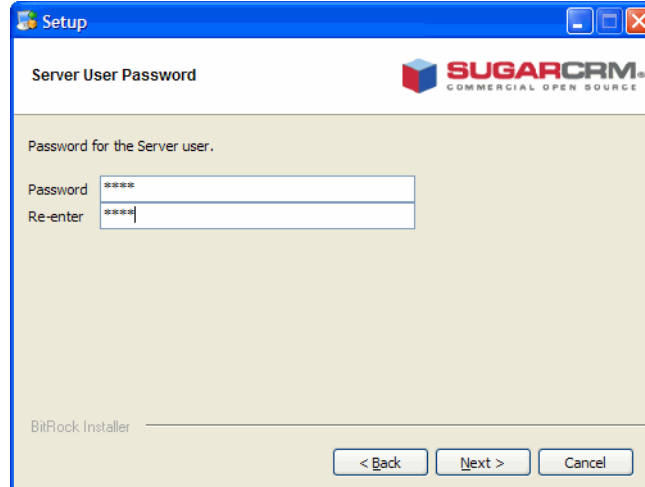


5. Enter the Sugar Suite server URL and click **Next**.  
The Server User window displays.



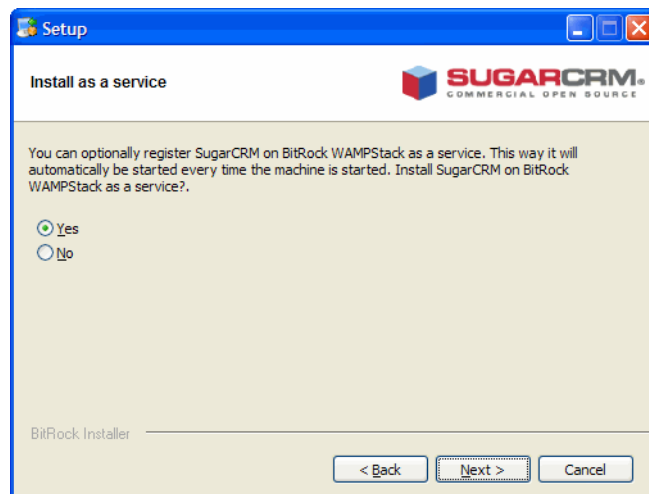
6. Enter the name of the Sugar Suite user who will be using the Sugar Offline Client, and click **Next**.

The Server User Password window displays.



7. Enter the user password for the Sugar Suite server, re-enter it, and click **Next**.

The **Install as a service** window displays. To automatically start the Apache Server and the MySQL database services whenever you start your machine, select **Yes**. If not, select **No**.



The **Ready to Install** window displays.

8. Click **Next**.

The **Ready to Install** window displays.

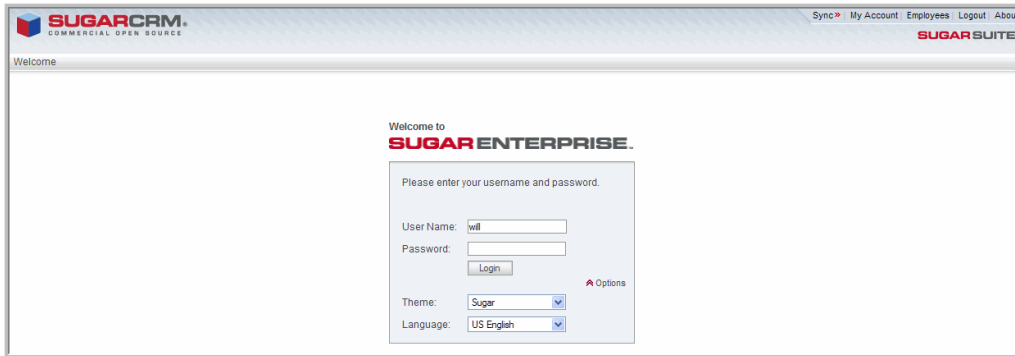
9. Click **Next**.

The **Installing** window displays; the installation and configuration process begins. Click **Unblock** if the Windows Security Alert window displays an option to block the Apache HTTP Server and the SQL Database Server.

The installer displays a message when installation is complete. It also displays a **Launch SugarCRM now?** checkbox.

10. Keep this checkbox checked and click **Finish**.

The Sugar Suite Login screen displays.



11. Enter your Sugar Suite user name and password.

The Welcome page displays. You can now synchronize data between the Sugar Suite server and your Sugar Offline Client.

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**Note:** You can log into Sugar Suite later, if necessary. Go to *Start > All Programs > Sugar Offline Client on BitRock WAMPStack > Start Here*.

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## Step 2. Synchronize Application Files and Data Between the Server and the Client

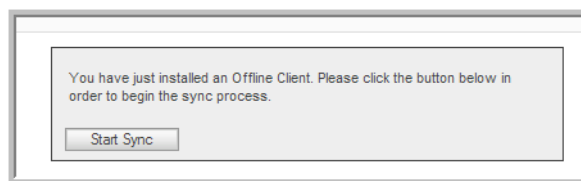
After the installation, the Offline Client application is ready to synchronize application files and data between the server and the client.

### To synchronize the Offline Client:

1. Select the time zone of your choice and click **Save**.

The system displays a **Start Sync** button.

2. Click **Start Sync** to begin the synchronization process.

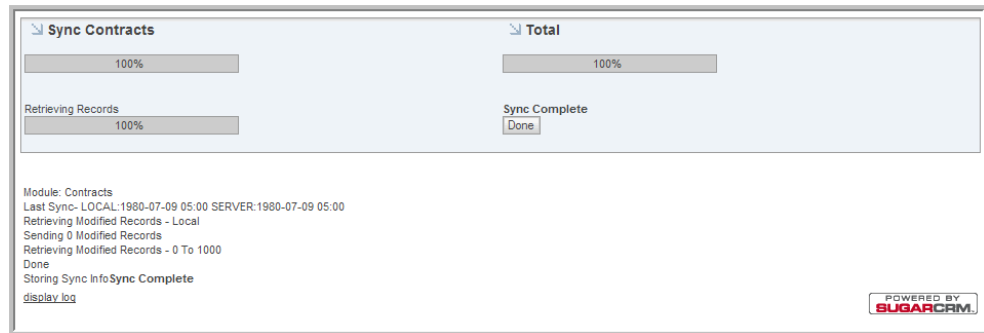


The Sync window displays a drop-down list with options to handle conflict resolution during data synchronization. The default is Prompt. Because there are no conflicts during the initial synchronization, you can accept the default. For more information on conflict resolution, see [“Overview” on page 1](#).

3. Click **Start Sync** again.

The synchronization process begins. The synchronization process initially verifies and copies over any application files modified or customized on the Sugar server. This insures that the client system automatically receives any modifications made to the application on the server.

After the application files are synchronized, then the records accessible to the user are synchronized. A popup with a synchronization summary similar to the following displays:



When synchronization completes, the Done button displays under the Total Progress bar.

4. Click **Done**.

The Home page displays. You can now begin working with the offline client on your machine. It is strongly recommended that you frequently synchronize data to ensure that the data on the server and the client are both updated.

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**Note:** If any errors are encountered in the sync process, they are logged in the sync.log file of the Offline Client's Web root directory (for example, *C:\Program Files\SugarCRM\Sugar Offline Client\htdocs\sugarcrm\sync.log*). The log can also be viewed by selecting the Details link in the sync popup.

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## Installing Sugar Offline Client with Existing WAMPStack

To minimize troubleshooting, it is recommended that administrators encourage Offline Client users in their organization to install the Sugar Offline Client.

However, to enable a user to install the Sugar Offline Client with an existing WAMP stack, the administrator must do the following:

1. Locate the *Sugar PRO/ENT install .zip* file that was used to install the Sugar Suite server.
2. Make a copy of the .zip file and name it *SugarENT-OC-4.2.1.zip* (or *SugarPRO-OC-4.2.1.zip* for PRO edition).
3. Create a config.php file with the following information:

```
<?php
$sugar_config = array (
    'installer_locked' => false,
    'disc_client' => true,
);
?>
```

4. Replace the *config.php* file that is currently in SugarENT-OC-4.2.1.zip file with the config.php file that you created in Step 2.

5. Distribute the *SugarENT-OC-4.2.1.zip* file or the *SugarPRO-OC-4.2.1.zip* file, as appropriate, to users who want to install the Sugar Offline Client on an existing WAMP stack.

Sugar Offline Client users can now unzip the *SugarENT-OC-4.2.1.zip* or the *SugarPRO-OC-4.2.1.zip* file and install the Sugar Suite application as described in the *Sugar Suite 4.2 Enterprise Installation and Upgrade Guide* or the *Sugar Suite 4.2 Professional Installation and Upgrade Guide*, as appropriate.

## Managing the Sugar Offline Client

Both users and administrators can perform specific tasks to manage Sugar Offline Clients. Users can manage the WAMP stack components. Administrators can manage Offline Client instances and users (as described in [“Installation Prerequisites” on page 2](#))

### Sugar Offline Client Management for Users

After you complete installation, you can navigate to *Start > All Programs > Sugar Offline Client* to start and stop any of the stack components, or to uninstall the stack.

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**Note:** If you elected to install the Sugar Offline Client as a service, your system automatically starts the WAMP stack for you.

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Run SugarCRM: Select this option and then choose one of the following options:

- o All: Start, stop, or restart the WAMP Stack.
- o Apache: Start, stop, or restart the Apache Server.
- o MySQL: Start, stop, or restart the MySQL database.

Sugar CRM Service: Select this option to install, uninstall, start, or stop the WAMP Stack service.

Start Here: Select this option to log into the Sugar Offline Client.

Sugar Offline Client Installation Guide PDF: Select this option to access the PDF version of this guide.

SugarCRM Website. Select this option to launch the SugarCRM Website.

Uninstall Sugar Offline Client. Select this option to uninstall Sugar Offline Client from your machine.

### Sugar Offline Client Management for Administrators

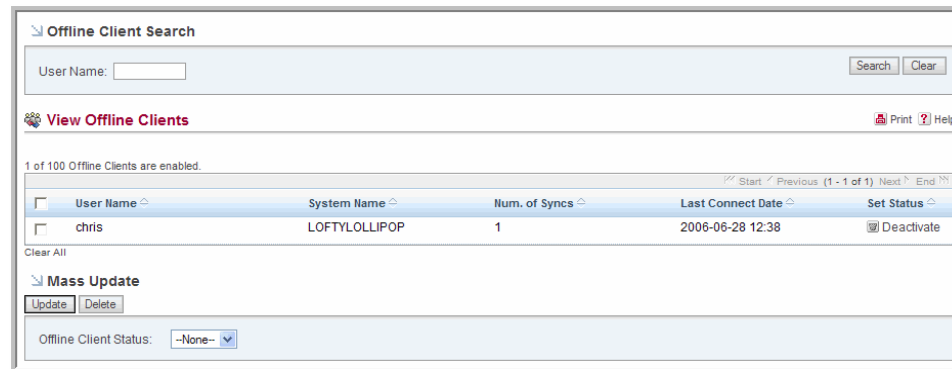
When a Sugar Offline Client user completes installation and the initial data synchronization, the user’s name along with details of the Sugar Offline Client instance such as the machine name and status displays in the list of Offline Clients. The administrator can activate, deactivate, and delete Offline Client instances from this page.

## To manage Sugar Offline Client instances

1. Log into Sugar Suite as an administrator and click the Admin link at the top right-hand corner of the page.

The Administration Home page displays.

2. In the System sub-panel, click **View Offline Clients** to view the list of existing Sugar Offline Client instances along with related information such as the user name, the client machine name, the number of data synchronizations that have occurred to date, the last connected date, and the status.



3. To view the number of Offline Client instances for a user, enter the user name in the Offline Client Search panel and click **Search**.  
The search results display in the View Offline Clients sub-panel.
4. To deactivate an instance, click the corresponding **Deactivate** icon under the Set Status column.  
To activate a disabled Offline Client, click the corresponding **Activate** icon under the Set Status column.  
The system displays a message requesting confirmation of your action.
5. Click **OK** to confirm the deactivation.
6. To activate or deactivate more than one Offline Client instance, select them in the list, select the status from the Offline Client Status drop-down list in the Mass Update sub-panel, and click **Update**.
7. To delete one or more Offline Client instances, select them in the list, and in the Mass Update sub-panel, click **Delete**.

## Frequently Asked Questions

1. Can we use the Offline Client on Sugar Suite Open Source?  
No. The Sugar Offline Client can only be used with Sugar Professional and Sugar Enterprise.
2. We use Sugar Suite with Oracle database on our server. Can we use the Sugar Offline Client with this configuration?  
Yes. There are no differences in the Sugar Offline Client's functionality arising from your choice of server databases.
3. We use Sugar Suite On-Demand. Can we use the Sugar Offline Client with this configuration?  
Yes. The Offline Client can be used equivalently with each Sugar deployment option: Sugar On-Demand, Sugar On-Premise, or Sugar Cube.
4. Can I customize the Sugar Suite application when I have the Sugar Offline Client?  
Yes. The Sugar Offline Client synchronization process ensures that the application files on the Offline Client are equivalent to those on the server before synchronizing data. Custom fields you create using the Studio on the server will be reflected on the client at the next sync. (The Studio itself is not available on the Sugar Offline Client.)
5. Can I run dissimilar Sugar Suite versions on the server and the client?  
No. The Sugar Suite version that exists on the server must match the Sugar Suite version that resides on the client machine.
6. How do I upgrade the Sugar Offline Client to a newer version of Sugar Suite?  
Re-install the newer version of Sugar Suite on the Sugar Offline Client, re-convert the Offline Client, and perform a clean synchronization. Many sales organizations time their software rollouts to periodic sales events at which time this process can be applied to each sales representatives PC in turn. Be sure to perform a sync beforehand so all the local data is stored on the server.
7. Can a given Offline Client instance be used by multiple users?  
No. The Offline Client conversion process binds the local Sugar application instance to a specific user. Only that user's data will be available for use in the Offline Client.
8. Can the PC be used to connect to the server system?  
Yes. The Sync -> Go Online menu option exists for this purpose.
9. What records will the Offline Client user be able to see?  
The synchronization process ensures that whatever records are visible to the user while connected to the Sugar server are available on the Offline Client.
10. Why is the WAMP stack required?  
Sugar Offline Client is based on the same technology as the Sugar Suite application residing on your server, except that only Sales-related modules are available on the Sugar Offline Client. This means that Offline Client users require no additional training and are already accustomed to the look-and-feel of the

Offline Client application. The Sugar Offline Client needs the WAMP stack because the Offline Client uses much of the same implementation as the server application.

11. How do I increase the Sugar Suite Offline Client licenses?

To increase the server's Offline Client licenses:

- a. Log into the server as Admin.
- b. Navigate to Admin > System > License Management.
- c. Increase the number of licenses allocated for the Sugar Offline Client.

