



Sugar Portal Installation and User Guide Version 6.2.0

Sugar Portal Installation and User Guide for Sugar Ultimate
Version 6.2.0, 2011

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This document describes how to install and use the Sugar Portal to view, edit, and create records in Sugar Ultimate 6.2.0.

Topics include:

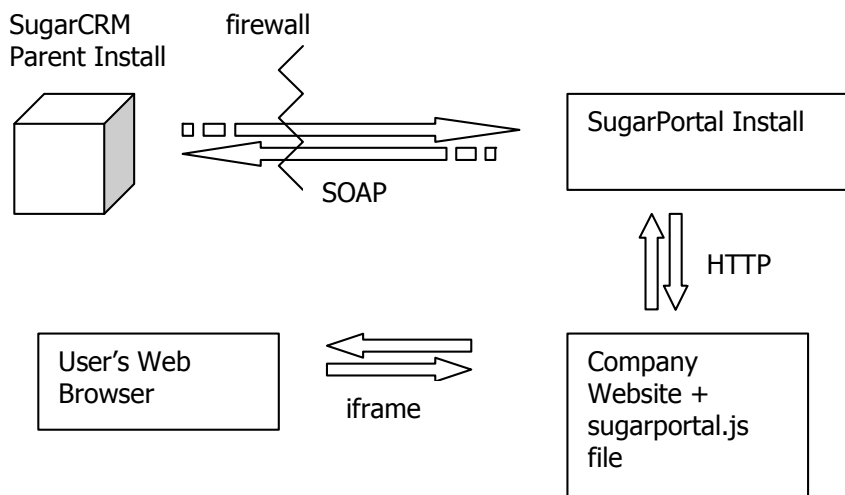
- **Overview**
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Overview

Sugar Portal is a portal framework that provides a self-service portal, which allows your customers to view, create, and edit cases and bugs in Sugar. You can also view Knowledge Base articles, such as FAQs, created in Sugar.

Sugar Portal uses SOAP to communicate with Sugar Ultimate. The communication between your browser and Sugar Portal is facilitated with an iFrame. Webmasters only need to place a small piece of JavaScript code where they want the iFrame to appear.

The following diagram illustrates how the Sugar Portal communicates with the browser.



Any case or bug that you create in Sugar Portal is stored in the Sugar database on the Sugar server and displays in Sugar. Users cannot delete a record in Sugar Portal, but they can do so when they log into Sugar Ultimate.

To customize Sugar Portal to suit the organization's requirements, the administrator can use the Developer Tools functionality in the Sugar application to edit the style sheet and page layouts. The administrator can then synchronize the portal from Sugar to reflect the changes. For more information, see the *Sugar Ultimate Application Guide*.

Installation Prerequisites

1. Ensure that you have installed Sugar Ultimate 6.2.0.
2. Log into Sugar to configure the following settings before you install Sugar Portal:
 - a. The **License Management** page in Sugar displays the number of portal users that you purchased with your license.
 - b. In the **System Settings** panel, scroll down to the **Customer Self-Service Portal** section and select **Enable Portal User Management**.

This enables the Self-Service Portal API.
 - c. On the User Management page, select the **Create Portal API User** option from the Actions menu.
 - d. Enter the portal user's name and specify the username.
 - e. Select **Active** in the Status drop-down field.
 - f. Enter a password for the portal use in the **New Password** field and re-enter it in the **Confirm Password** field.

You will need this information when you install Sugar Portal because the portal will use it to establish communication with the Sugar application.
 - g. Enter the portal user's primary email address; to add an alternate email address, click **Add** and enter it in the field that displays below the primary email field.
 - h. Click **Save** to create the portal user.

The contacts in Sugar are the portal users in Sugar Portal. After you create the portal user, the **Create Contact** page in Sugar displays a Portal sub-panel where you can enter the contact's Portal name and password.

You will need to create a portal name and password for each contact who is also a Sugar Portal user. This is the user name and password that a contact needs to log into the portal as a portal user.

Installing Sugar Portal

Perform the following step to install Sugar Portal:

1. Obtain the **Sugar Portal-6.2.0.zip** file from SugarCRM, save it to your Web server, and extract the files to a separate folder.

You will use one of the extracted files, **install.php**, to install Sugar Portal.

2. On your Web browser, enter the location of the **install.php** file on your web server. For example: **localhost/SugarPortal/install.php**.

Note: If you plan to run Sugar Portal on the same Web server as Sugar, it is recommended that you set up a custom PHP session directory. If not, you will get logged out of Sugar when you use Sugar Portal on the same browser.

This displays the Sugar Portal Setup Wizard's Welcome page.

3. Click **Start**.
4. Accept the License Agreement and click **Next**.

This displays the **System Check Acceptance** page.

5. If the status of all the components display in green, click **Next**.

This displays the **Site Configuration** page.

Enter the following information on this page:

URL of Sugar Portal Instance: The URL of this instance

URL of Parent SugarCRM Instance: The URL of your Sugar instance from where data will be stored and retrieved.

SugarCRM Portal User Name: The portal user name that you created in Sugar. This is the user name that the portal uses to authenticate itself with the Sugar application.

SugarCRM Portal Password: The password of the portal user specified in Sugar.

Use Defaults? By default, this option is enabled to use default Session Directory, Log Directory, and Application ID for your Sugar instance. If you want to override these default settings, deselect this option. You must then check the box for each of these three options and enter the path to the Session Directory, the name of custom Log Directory, and the Application ID in the field that displays below each of these options.

6. Click **Next**.
7. Ensure that the settings are correct and click **Next**.

This displays the **Confirm Settings** page.

This displays the **Perform Setup** page.

8. Click **Next**.

This displays the **Script Copy** page.

To incorporate a link to the portal on a specific website, copy the script from the text box and place this on the website. This script will place an iframe that points to the Sugar Portal install. On this page, note the location of the JavaScript file that you can use to modify the height and width of the iframe.

9. Click **Next**.

This displays the **Registration** page.

10. Optionally, enter the registration information and click **Finish**.

The installation is now complete. Your web page will now display a Sugar Portal login dialog box. Your customers need to register themselves with Sugar Portal in order to access its functionality.

Note: To ensure that your customers can successfully use Sugar Portal, create a contact in Sugar as a portal-only user and log into Sugar Portal with the portal username and password.

The system converts Sugar Portal registrants into leads in Sugar. You can then convert these leads into contacts and create user names and passwords for them in the Contacts Edit View page. You must send every registrant a unique user name and password to log into Sugar Portal.

You can customize Sugar Portal page layouts to meet your organization's needs using Sugar's Developer Tools. This includes adding, editing, and removing fields, including Calculated Value fields. For more information, see *Sugar Portal* in the *Sugar Ultimate Application Guide*.

Using Sugar Portal

Organizations can allow their contacts to access and manage records on the Sugar server through Sugar Portal. **Contacts** are external individuals such as vendors and customers.

You can use Sugar Portal to access records in the following Sugar modules:

- Cases: You can view, create, and edit cases.
- Bug Tracker: You can view, create, and edit bugs.
- Newsletters: You can subscribe and un-subscribe from newsletters.
- Knowledge Base: You can read articles created in Sugar.

In order to use Sugar Portal, the administrator must do the following:

1. Synchronize Sugar Portal with Sugar as described in *To Update Sugar Portal* in the *Sugar Ultimate Application Guide*.
2. Enable the appropriate contacts as Portal users in Sugar.

Contacts can also register themselves with Sugar Portal. After you receive their registration, you must email them their username and password.

After contacts receive their username and password, they must complete the following steps:

- a. Log into Sugar Portal with the username and password that they received.
- b. Enter their personal information on the User Settings page to create their account with Sugar Portal.

To register with Sugar Portal

1. On the Sugar Portal login page, click the **New user? Please register** link.
This displays the registration page.
2. Enter your name, address, phone number, and other information.

If you do not want to receive phone calls from the organization, select the **Do Not Call** box.

If you do not want to receive emails from the organization, select the **Email Opt Out** box.

3. Click **Save** to forward your registration information to Sugar Portal; click **Cancel** if you do not want to register with Sugar Portal.

To enter your account information

1. Log into Sugar Portal with your Sugar Portal username and password.
2. On the Sugar Portal Home page, click the **My Account** link.
3. On the **My Account** page, enter your name, address, and phone number.
4. Click **Save** to save the information.

Managing Cases

You can view, create, and edit cases in Sugar Portal. Any case that you create or edit is saved on the Sugar server. In order to delete it, you will need to log into Sugar.

To create a case

1. Log into Sugar Portal and click the **Cases** tab.
The **Cases** page displays a **Search** sub-panel and a list of existing cases below.
You can use the **Search** sub-panel to search for a case using criteria such as the case number and status.
2. Click the **Create New** link at the top of the page or click the Create icon on any page within the **Cases** module.
This displays the Cases form.
3. Enter information for the following fields:
Priority. Select the appropriate priority to reflect the urgency of the case.
Subject. Enter the subject of the case.
Description. Describe the problem.
4. Click **Save** to create the case; click **Cancel** to exit the page without creating the case.

The case is assigned to the user who is assigned to the contact.

When you save a case, the system displays its Detail View. You can attach a note or a file from this page as described in [To attach a note or a file](#)

To view or edit an existing case

1. On the **Cases** page, select the subject of the case that you want to view.
This displays the Case Detail View page.
2. To edit the case, click **Edit** and make the necessary changes.

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3. Click **Save** to update the case details; click **Cancel** if you do not want to save the changes.

To attach a note or a file

1. On the case Detail View page, click **Attach Note**.
The fields to add a note display below.
2. Enter information for the following fields:
Subject. Enter the subject of the note.
Description. Enter the text of the note.
3. To attach a file, click **Browse**, navigate to the file location, and select it.
The note is listed on the Detail View page of the case.
4. To edit the note, click on note's subject on the detail page and then click **Edit**.

Managing Bugs

You can view, create, and edit bugs in Sugar Portal. Any bug that you create or edit is saved on the Sugar server. In order to delete it, you will need to log into Sugar.

To create a bug

1. Log into Sugar Portal and select the **Bug Tracker** tab.
The **Bug Tracker Home** page displays the **Search** sub-panel and existing bugs. You can use the Search sub-panel to search for a bug using criteria such as the bug number and status.
2. Click the **Create New** link.
The Bug Tracker form displays on the screen.
3. Enter information for the following fields:
Priority. Select the priority from the drop-down list.
Status. Select the bug's status from the drop-down list.
Source. Select the source that reported the bug from the drop-down list.
Category. Select the module to which the bug is related from the drop-down list.
Subject. Enter the subject of the bug.
Description. Describe the problem.
Work Log. This is the field where the user who is assigned to the bug enters a description of the action taken to fix the bug.
4. Click **Save** to create the bug; click **Cancel** to exit the page without creating the bug.
The bug is assigned to the user who is assigned to the contact.
When you save a bug, the system displays its Detail View. You can attach a note or a file from this page as described in [To attach a note or a file](#).

To view or edit an existing bug

1. On the Bug Tracker page, select the bug that you want to view.
This displays the bug Detail View page.
2. To edit the bug, click **Edit** and make the necessary changes.
3. Click **Save** to update the case details; click **Cancel** if you do not want to save the changes.

Managing Newsletter Subscriptions

Newsletters that are created in Sugar display in Sugar Portal. You can subscribe to and unsubscribe from newsletters through Sugar Portal. Any newsletters that you subscribe to will be emailed to you.

To manage newsletter subscriptions

1. On the Sugar Portal Home page, select the **Newsletters** tab.
A list of your current newsletter subscriptions and available newsletters display on the page.
2. To subscribe to a newsletter, select the box next to it and click **Save**. To select all the listed newsletters, click **Check All**.
3. To unsubscribe from a newsletter, deselect the box next to it and click **Save**. To deselect all selected newsletter, click **Uncheck All**.

Viewing Knowledge Base Articles

You can view Knowledge Base articles that are created in Sugar. An article can be on any subject such as case resolutions or FAQs (Frequently Asked Questions).

The articles are grouped into two categories in Sugar Portal: **Most Viewed Articles** and **Most Recent Articles**. By default, only the first 10 articles in each category are listed on the page. Your administrator can change this default number as needed.

If the article you want is not listed on the page, you can perform a full text search or a title search to find it. In a full text search, you can use any word that appears in the text of the article.

Viewing FAQs

FAQs are articles created in Sugar in response to frequent questions that an organization receives from its customers. The FAQs are listed on a separate tab but you can search for an FAQ on the Knowledge Base tab.

The screenshot below displays individual FAQs in various FAQ categories. The Sugar administrator creates the FAQ categories.

To view an article or an FAQ

1. To view an article or an FAQ, click its name in the list.

Attachments such as files and images, if any, are listed at the bottom of the article. To view or download an attachment to your local machine, click its name, select the appropriate option, and click **OK**.

2. To search for an article by its title, enter its name in the **Document Name** field and click **Search**.

To search for an article by one or more words that appear in its contents, enter the keywords in the **Keywords** field and click **Search**. Use spaces to separate keywords.

When you specify a keyword, the system performs a full text search of the article's contents for the keyword. You can use keywords to include or exclude articles in the search results.

Use the following search guidelines:

- You can search for keywords and phrases. Keywords and phrases are not case-sensitive.
- Phrases must be enclosed in double quotes. For example, "the whole nine yards".
- To specify multiple keywords, you can use spaces. Using spaces is similar to using the OR operator. For example, if you search for *brown blue*, the search results will return articles that contain brown or blue.
- Using the plus (+) sign will return articles that have both the words. For example, *brown +blue* will return only articles that contain both the words.
- To ensure that a word is included in the search, use the plus (+) sign before the word. For example, to find articles on the impact of global warming on polar bears, you can search for "*global warming*" +*bears* or "*global warming*" + "*polar bears*".
- To exclude keywords or phrases, use the minus (-) sign. For example, *brown blue -yellow*. When you specify a word in the **Excluding these words** field in Advanced Search, you do not need to use the minus sign.
- Use wildcard characters % or * to specify a partial word. For example, to find words that begin with *super*, you can search for *super%* or *super**.