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# Sugar Ultimate 6.5 Portal Installation Guide

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## Overview

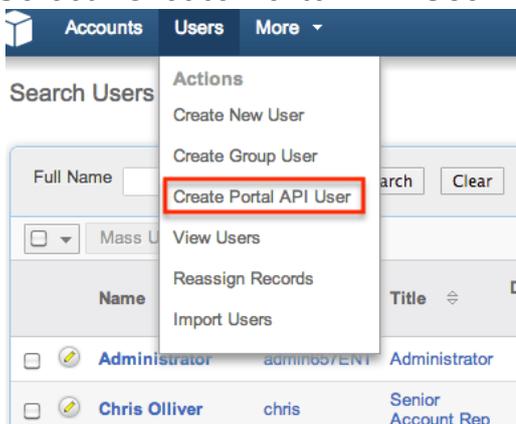
When you purchase the Enterprise or Ultimate editions of Sugar, you have the option to install and configure a portal for your customers to interact with your users. The Sugar Portal allows your customers to file bugs, cases, and review knowledge base articles.

The portal is a separate component that needs to be installed prior to utilizing and it uses the same database as your Sugar instance. The portal uses SOAP to communicate data with Sugar (Enterprise or Ultimate), so it is important that you set up proper connection between the two. This article will walk through how to download and install the portal for Sugar versions 6.5 and earlier.

## Prerequisites

Prior to installing the portal, you will need to ensure that the following items below are set up.

1. You must have either the Enterprise or Ultimate edition of Sugar in order to install the portal.
2. You must enable the portal user management.
  - Navigate to Admin > System Settings and select "Enable Portal User Management" under the Customer Self-Service Portal section.
3. You must create a portal API user via Admin > User Management. Please note that the username and password you create will be required when installing the portal to authenticate the connection to your Sugar instance.
  - Select "Create Portal API User" on the User Management page.



- Enter in the name and username for the portal user.
- Select the status as "Active".

- Enter in the email address for the portal user then click the Password tab to create a password.
- Click "Save" to create the portal user.

The screenshot shows the 'User Profile' form in Sugar CRM. At the top, there are buttons for 'Save', 'Cancel', 'Reset User Preferences', and 'Reset Homepage'. The 'Save' button is highlighted with a red box. Below the buttons, there are two tabs: 'User Profile' and 'Password', with the 'Password' tab highlighted by a red box. The 'User Profile' section contains fields for 'User Name', 'Name', 'Status' (set to 'Active'), and 'User Type' (set to 'Portal API User'). A note below 'User Type' states: 'Use for the Portal API. This type cannot login through the Sugar web interface.' The 'Email Settings' section below has an 'Email Address' field with a '+' button and 'Primary' and 'Reply-to' checkboxes.

## Steps to Complete

On-Site customers who wish to utilize the portal should follow the steps below to download and install the portal. On-Demand customers should [file a case](#) with the Sugar Support team to get the portal installed.

1. Obtain the Sugar Portal package from the download manager at [support.sugarcrm.com](http://support.sugarcrm.com). You can also request the file from the Sugar Support team if you do not have access to the download manager.
2. Select the portal package from the download manager. We will select "SugarPortal-Ent-6.5.0.zip" for our example.

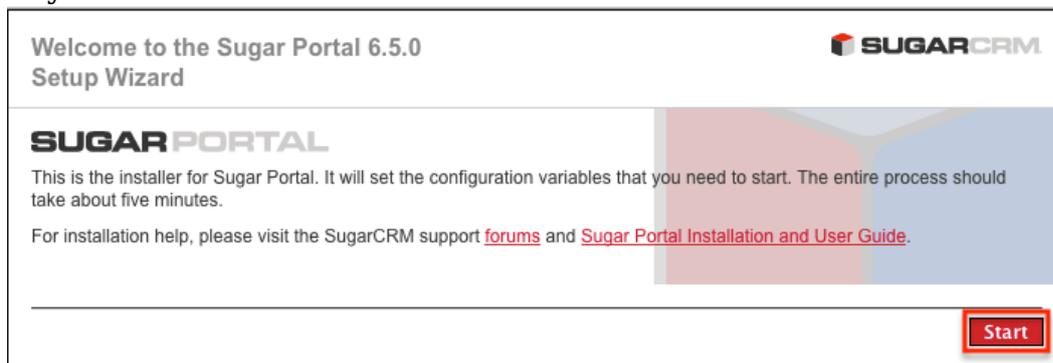
### Portal

[SugarPortal-Ent-6.5.0.zip](#)

3. Place the un-compressed folder to the DocumentRoot of your web server. For our example, we renamed the un-compressed folder as `portalent650`.
  - Please check the [supported platforms](#) for the web server and PHP.
4. Enter the location of the `install.php` file in the web browser. For our example, we will use `http://localhost:8888/portalent650/install.php` to get to the portal set up page.
  - Please note that it is recommended you set up a custom PHP session directory if you plan on running the portal on the same web server as your Sugar instance. If you do not set up a custom PHP session directory, then you will be logged off of your Sugar instance if you log into your portal on the same web browser.

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5. Click the Start button in the Setup Wizard to begin the portal installation on your web server.



6. Accept the License Agreement and click "Next".

7. Click "Next" on the System Check Acceptance page if the status of all components are displayed in green.

8. Complete the Site Configuration page on Step 3 and click "Next".

- URL of Sugar Portal Instance : The URL of your Sugar Portal. For our example, the URL is `http://localhost:8888/portalent650/install.php`.
- URL of Parent SugarCRM Instance : The URL of your Sugar instance, which the portal will establish a connection to. For our example, the URL is `http://localhost:8888/ent657`.
- SugarCRM Portal User Name : Enter in the username of the portal user that you created in User Management.
- SugarCRM Portal User Password : Enter in the password of the portal user that you created in User Management.

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### Step 3: Site Configuration



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

\* Required field

#### Site Configuration

* URL of Sugar Portal Instance	<input type="text" value="http://localhost/portalent650"/>
* URL of Parent SugarCRM Instance	<input type="text"/>
* SugarCRM Portal User Name	<input type="text" value="admin"/>
* SugarCRM Portal User Password <small>This is name of the user set up at the Portal User in the Parent install.</small>	<input type="password" value="...."/>
Use Defaults?	<input checked="" type="checkbox"/>

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

9. Continue through Steps 4 and 5 of the Setup Wizard.

10. In Step 6, take the displayed JavaScript in the text box and place this on the webpage where you want the portal to appear.

- The JavaScript places an IFrame that points back to your Sugar Portal.
- Please note the location of the JavaScript file on this page, which can be used to modify the height and width of the IFrame.

11. Click "Next" and proceed through the remaining setup steps then click "Finish".

If you run into any issues installing the portal, please refer to the article [Troubleshooting Portal Installation Issues](#).

Once the portal installation is complete, you can log into your Sugar Portal and make customizations to the portal layout as well via Admin > Sugar Portal.

Last Modified: 09/07/2016 02:55pm