
Sugar Ultimate 6.2 Portal Installation Guide

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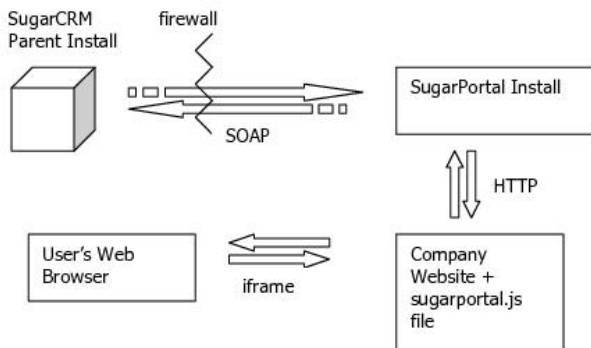
Overview

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 communication

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**.

This displays the Confirm Settings page.

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

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.

