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# Sugar Ultimate 6.5 Installation and Upgrade Guide

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# Sugar Ultimate 6.5 Installation and Upgrade Guide

## Overview

This documentation will go through the requirements and steps to install Sugar on a local web server as well as upgrading a current installation to the latest version of Sugar. The following instructions are intended for system administrators with access to the appropriate systems and a basic familiarity with the technology being used.

## Installation

Installing Sugar requires a web server running PHP and a database server. The following sections detail the requirements needed for installing Sugar on a local web server stack as well as the individual steps to install Sugar.

## Prerequisites

Sugar can run on a variety of stack configurations, but there are some general requirements that all configurations should meet to properly run Sugar. For more information regarding which platforms and database providers are supported by Sugar, please refer to the [Support Platforms](#) documentation.

## PHP

Not only is PHP required to run Sugar, there are specific PHP modules required as well as some specific settings. The following modules are required to be running in PHP before installing Sugar:

- curl
- gd
- hash
- imap
- json
- mbstring
- openssl
- SimpleXML
- zip
- zlib

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Please verify these modules are installed in your PHP configuration by checking the `php.ini` file or by executing a [phpinfo](#) output.

The following table lists some common directives and their recommended values, which can be set in the `php.ini` file of your PHP configuration:

| Directive                       | PHP Default | Recommended | Description  |
|---------------------------------|-------------|-------------|--|
| <code>date.timezone</code>      |             | N/A         | The timezone to use by default for date and time functions. View the list of possible timezones here:<br><a href="http://www.php.net/manual/en/timezones.php">http://www.php.net/manual/en/timezones.php</a> |
| <code>display_errors</code>     | 1           | 0           | Determines if errors will be printed on the webpage as part of the output or if they are hidden.   |
| <code>fastcgi.logging</code>    | 1           | 0           | Determines if SAPI logging is on or off when using FastCGI. FastCGI logging should be disabled when running on IIS.  |
| <code>max_execution_time</code> | 30          | 120         | Determines the maximum amount of time in seconds that a script can run. This helps prevent the server being occupied by a long-running script.   |
| <code>max_input_time</code>     | -1          | 120         | Determines the maximum amount of time in seconds that a script can analyze input data such as POST and GET. The  |

|                         |      |      |  |
|-------------------------|------|------|--|
|                         |      |      | default value of "-1" specifies that the max_execution_time will be used instead.  |
| memory_limit            | 128M | 512M | Determines the maximum memory size in bytes that a script can be allocated. This helps prevent a script from using all of the available memory.  |
| post_max_size           | 8M   | 30M  | Determines the maximum size in megabytes of post data allowed. This is primarily important for file uploads as if the file is larger than this value the upload will fail. This value should mirror the setting for upload_max_filesize and may be set to a larger value if your users routinely upload large files. |
| session.cookie_lifetime | 0    | N/A  | Determines the lifetime of a PHP session in seconds. The value 0 specifies the session will be active until the browser is closed.   |
| session.gc_maxlifetime  | 1440 | N/A  | Determines the number of seconds after which data in the session will potentially be   |

|                     |    |     |   |
|---------------------|----|-----|---|
|                     |    |     | removed.  |
| upload_max_filesize | 2M | 30M | Determines the maximum size in megabytes of an uploaded file. This value should mirror the setting for post_max_size and may be set to a larger value if your users routinely upload large files. |

For more information regarding PHP directives and what their function is, please refer to [www.php.net](http://www.php.net).

## Database

Sugar requires a supported database to already be running in order to install. On top of a running database, there are some specific settings that need to be configured before Sugar can be installed. PHP needs to be configured with the proper drivers to communicate with the database of your choice.

Use the following steps to configure PHP to be able to access your database:

1. Obtain the proper driver files corresponding to your database, server architecture, and PHP version.

| Database      | Extension | Driver Location   |
|---------------|-----------|---|
| MySQL         | mysqli    | <a href="http://us.php.net/manual/en/book.mysqli.php">http://us.php.net/manual/en/book.mysqli.php</a>                     |
| Microsoft SQL | sqlsrv    | <a href="http://msdn.microsoft.com/en-us/library/cc296170.aspx">http://msdn.microsoft.com/en-us/library/cc296170.aspx</a> |
| Oracle        | oci8      | <a href="http://us.php.net/manual/en/book.oci8.php">http://us.php.net/manual/en/book.oci8.php</a>                         |
| DB2           | ibm_db2   | <a href="http://us.php.net/manual/en/book.ibm-db2.php">http://us.php.net/manual/en/book.ibm-db2.php</a>                   |

Place the driver files into PHP's extension\_dir folder.

Add an extension line into your php.ini file loading the driver file (e.g. extension=php\_mysqli.dll).

---

Restart your web server.

When running on Oracle, ensure that the character set is AL32UTF8 in NLS\_LANG setting on the client machine for Search optimization. For example, AMERICAN\_AMERICA.AL32UTF8 for a US-based user.

When installing on DB2, the database must first be created using the following commands:

```
#!/bin/sh
DBNAME=$1
: ${DBNAME:=sugarult}
export DB2DBDFT=$DBNAME # set $DBNAME as the default branch
db2 "FORCE APPLICATION ALL" # flush all connections
db2stop # stop DB2
db2start # start DB2
db2 "FORCE APPLICATION ALL" # flush all connections
db2 "DROP DATABASE $DBNAME" # drop the previously existing database if
it exists
db2 "CREATE DATABASE $DBNAME USING CODESET UTF-8 TERRITORY US COLLATE
USING UCA500R1_LEN_S2 PAGESIZE 32 K" # create the database from
scratch and enable case-insensitive collation
db2 "CONNECT TO $DBNAME" # make a connection to update the parameters
below
db2 "UPDATE database configuration for $DBNAME using DATABASE_MEMORY
AUTOMATIC" #Prevent memory exceeding
db2 "UPDATE database configuration for $DBNAME using logfilsiz 2048" #
default appeared to be 1024
db2set DB2_COMPATIBILITY_VECTOR=4008
db2 "CREATE BUFFERPOOL SUGARBP IMMEDIATE SIZE 1000 AUTOMATIC PAGESIZE
32 K"
db2 "CREATE LARGE TABLESPACE SUGARTS PAGESIZE 32 K MANAGED BY
AUTOMATIC STORAGE EXTENTSIZE 32 OVERHEAD 10.5 PREFETCHSIZE 32
TRANSFERRATE 0.14 BUFFERPOOL SUGARBP"
db2 "CREATE USER TEMPORARY TABLESPACE SUGARXGTTTS IN DATABASE
PARTITION GROUP IBMDEFAULTGROUP PAGESIZE 32K MANAGED BY AUTOMATIC
STORAGE EXTENTSIZE 32 PREFETCHSIZE 32 BUFFERPOOL SUGARBP OVERHEAD 7.5
TRANSFERRATE 0.06 NO FILE SYSTEM CACHING"
db2 "FORCE APPLICATION ALL" # close all conections to restart DB2
below
db2stop
db2start
db2 "CONNECT TO $DBNAME"
db2ts DISABLE DATABASE FOR TEXT CONNECT TO $DBNAME
db2ts ENABLE DATABASE FOR TEXT AUTOGRANT CONNECT TO $DBNAME
db2ts START FOR TEXT
```

---

When installing on DB2, the codepage must be adjusted using the following commands. If your DB2 server and web server are on different machines, this also needs to be run on your web server:

```
db2set DB2CODEPAGE=1208
db2stop
db2start
```

For more information regarding which database platforms and versions are supported by Sugar, please refer to the [6.5.x Supported Platforms](#) documentation.

## Web Server

Sugar requires some specific configuration regarding the supported web server it is to be installed to. Sugar creates and maintains many files in the Sugar directories; therefore, Sugar requires some very specific file permissions settings in order to install. The user the web server is running under needs to have read and write permissions on many Sugar files. At a minimum, the following files and directories need to be writable from your web server:

- ./config.php
- ./config\_override.php
- ./sugarcrm.log
- ./cache/ and all subdirectories and files
- ./custom/ and all subdirectories and files
- ./data/ and all subdirectories and files
- ./modules/ and all subdirectories and files

Sugar running on Windows with IIS will need the IIS user (IUSR\_[computerName]) to have access to these files. Sugar running on Linux expects the listed files and directories to be owned by the same user running the webserver and to also be in the same group. Sugar would then require the following permissions:

- 775 for the directories listed above
- 664 for the config.php file and all files in the directories listed above

Sugar running on IIS requires the PUT and DELETE verbs to be enabled.

Sugar running on the Apache web server requires a setting configured in the httpd.conf file. Modify the AllowOverride value for the Sugar installation directory to be set to "All". Your web server can have timeout configurations that may interrupt PHP execution. Apache has a Timeout directive and IIS has a CGI timeout



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function that both default to 300 seconds. For more information, please refer to the documentation for your specific web server.

Note: If you are planning to use a Real User Monitoring (RUM) agent, this may cause issues when fetching data from the REST APIs as additional data may be appended to JSON responses coming from the server causing errors.

## Downloading Sugar

Use the following steps to download the required files to install Sugar:

1. Navigate to <http://www.sugarcrm.com>.
2. Click "Login" on the top right-hand corner of the page.



3. Enter your SugarCRM.com credentials and click "Log in".

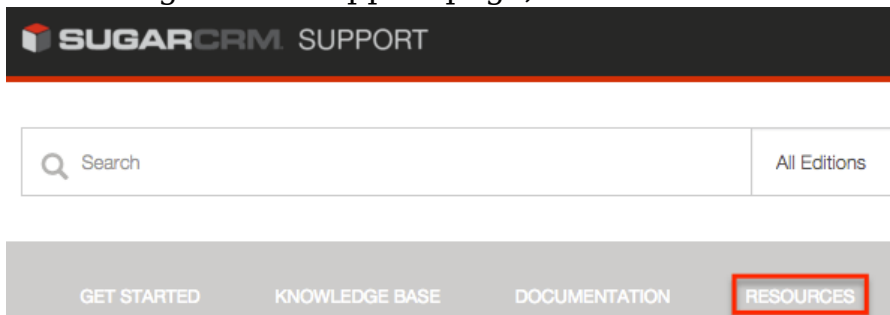
### Sign In

A screenshot of the 'Sign In' form on the SugarCRM website. It includes a 'User Name' field with a red asterisk, a 'Password' field with a red asterisk, and a 'Log in' button with a red border. Below the fields, there are links for 'Forgot password?' and 'Log in'.

4. After successfully logging in, click "Support" in the top menu to navigate to the SugarCRM Support page.



5. On the SugarCRM Support page, click "Resources" on the navigation bar.



6. Then on the Resources page, select "Download Purchased Software" under the Customer Resources section.

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## Customer Resources

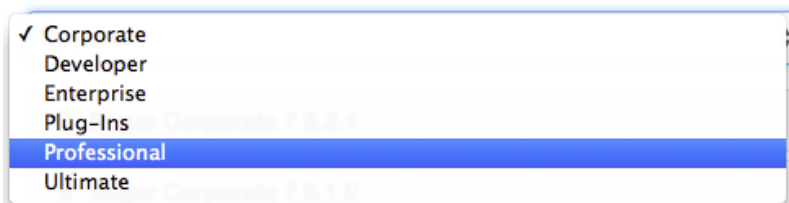
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- **Manage My Account** : Manage your contact information and view your subscription information.
- **View Orders** : View all orders you have placed with SugarCRM under the Orders tab.
- **Download Purchased Software** : Download installation and upgrade files for on-site deployments as well as plug-in installation files.
- **Bug Portal** : View past and current product defects and enhancement requests.
- **Case Portal** : If you are unable to find a solution on our support site or [community](#), submit a ticket so that a member of our support team can assist you as soon as possible.

7. On the Download Manager page, select the appropriate edition (e.g. Professional) of Sugar from the dropdown.

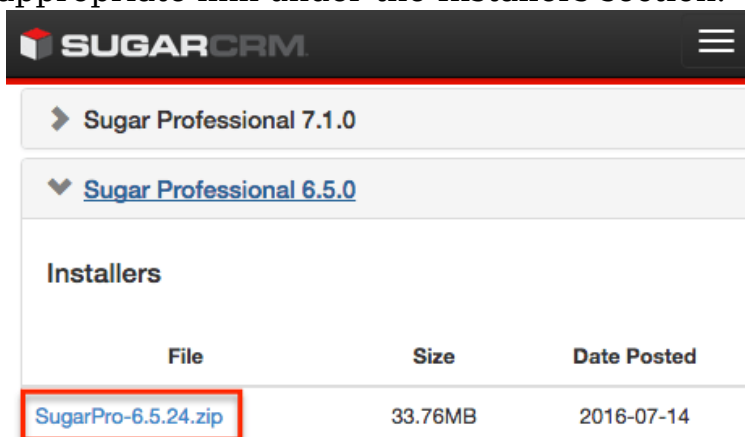
## Downloads

Based on your subscription you have access to the following files:



Note: You will only be able to select editions of Sugar that are tied to your SugarCRM.com account.

8. The most recent version of Sugar available for your account will be displayed at the top of the page. Click the link of the desired version to expand out the files available.
  - Note: Please keep in mind that there may be versions listed in the download manager which are no longer supported. Please verify that the version desired is supported by checking the [Supported Versions](#) page.
9. Download the installer zip file for your desired version by clicking the appropriate link under the Installers section.



Note: If performing an upgrade of an existing Sugar installation, download the proper upgrade file from the Upgrade Packages section. The upgrade files specify the from and to versions of Sugar in the file name. The from version must match the current version of Sugar to be able to perform the upgrade.

10. The installer zip file will be downloaded to your computer.

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## Preparing Installation

After downloading the installer zip file for Sugar you will need to extract the contents of the zip file into the served directory of your web server.

Use the following steps to prepare the files for installation:

1. Transfer the installer zip file to the web server where Sugar is to be installed.
2. Locate the web root directory on the web server. This directory is where files to be served will be located.

The following are common locations for the web root directory but may differ depending on your server configuration:

- Linux/Apache : /var/www/html/
  - Mac OSX/Apache : /Library/WebServer/Documents/
  - Windows/IIS : C:\Inetpub\wwwroot\
  - Windows/Apache : C:\Program Files\Apache Group\Apache\htdocs\
3. Extract the installer zip file's contents into the web root. This will create a directory in the web root indicating which edition and version of Sugar is in the contents (e.g. SugarPro-Full-6.5.13).
  4. Rename this directory to match the intent of the install (e.g. sugarcrm, sugarcrm\_dev, sugarcrm\_test, etc.).
  5. Next, set the permissions on the files within the Sugar directory. The user the web server is running under needs to have read and write permissions on many Sugar files. At a minimum, the following files and directories need to be writable from your web server:

- ./config.php
  - ./config\_override.php
  - ./sugarcrm.log
  - ./cache/ and all subdirectories and files
  - ./custom/ and all subdirectories and files
  - ./data/ and all subdirectories and files
  - ./modules/ and all subdirectories and files
- Sugar running on Windows with IIS will need the IIS user (IUSR\_[computerName]) to have access to these files. Sugar running on Linux expects the listed files and directories to be owned by the same user running the webserver and to also be in the same group. Sugar would then require the following permissions:

- 775 for the directories listed above
  - 664 for the config.php file and all files in the directories listed above
- To set the permissions on Linux you can execute the following commands in the Sugar root directory:

```
chown apache:apache -R <Sugar Directory>
chmod 755 -R <Sugar Directory>
```

This command assumes that the web server user and group are 'apache'. Your web server may be configured with different values and you should consult

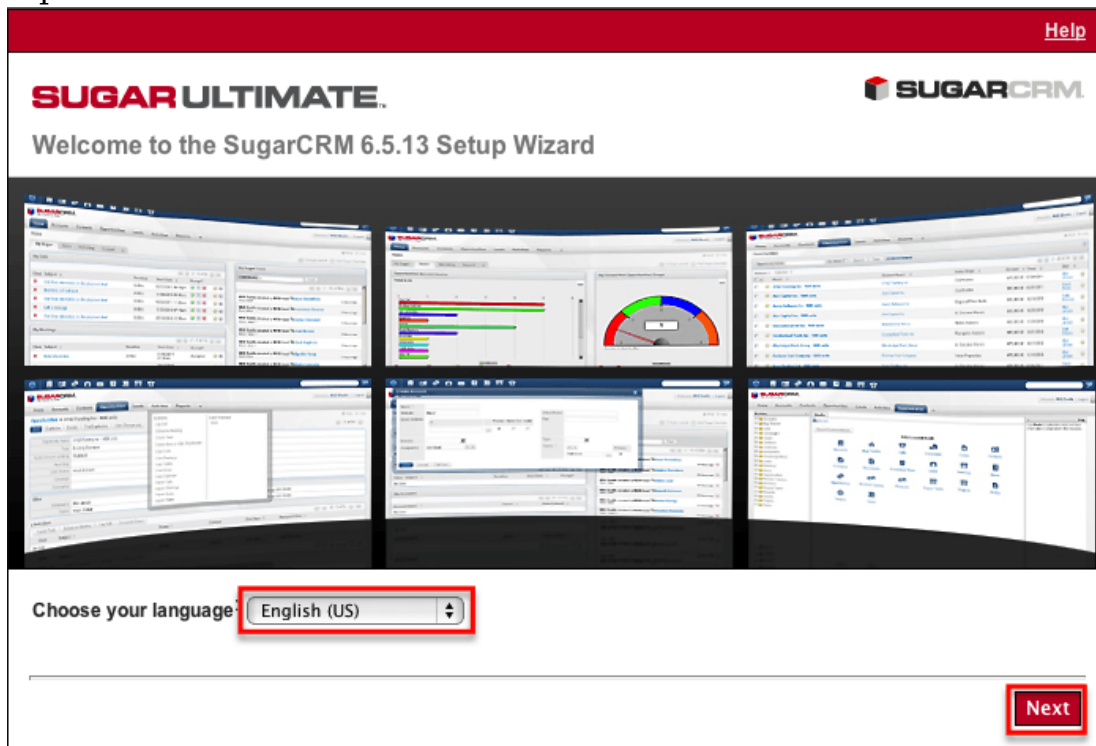
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your Apache configuration to ensure the proper values are used.

## Installing Via Setup Wizard

After preparing the installation files you are ready to install Sugar. Use the following steps to install Sugar via the Setup Wizard:

1. Using a supported web browser, navigate to the primary URL for your Sugar directory:  
http://{Your Web Server}/{Your Sugar Directory} (e.g. http://localhost/sugarcrm/).
2. The Setup Wizard will launch and bring you to the Welcome page.
3. Select the Desired Language to walk through the install with and click "Next" to proceed.



4. Review the information provided to ensure all of the proper steps have been taken to perform a successful install and click "Next" to continue.
5. Review the License Subscription Agreement and select "I Accept". Click "Next" to continue.

[Help](#)

SUGARULTIMATE.

### License Acceptance

PLEASE READ THIS MASTER SUBSCRIPTION AGREEMENT CAREFULLY BEFORE ACCEPTING. THE TERMS AND CONDITIONS OF THIS MASTER SUBSCRIPTION AGREEMENT, ANY ADDITIONAL TERMS AND ANY ORDER FORMS ENTERED INTO BY YOU AND SUGARCRM ARE COLLECTIVELY REFERRED TO AS THE "AGREEMENT." UNLESS OTHERWISE DEFINED HEREIN, CAPITALIZED TERMS SHALL HAVE THE MEANINGS SET FORTH IN SECTION 11 BELOW.

BY ACCEPTING, YOU ARE AGREEING ON BEHALF OF THE ENTITY ORDERING THE SUGARCRM PRODUCT ("COMPANY") THAT COMPANY WILL BE BOUND BY AND BECOME A PARTY TO THE AGREEMENT AND CERTIFYING THAT YOU HAVE THE AUTHORITY TO BIND COMPANY. IF COMPANY DOES NOT AGREE TO ALL OF THE TERMS OF THE AGREEMENT, DO NOT SELECT THE "ACCEPT" BOX OR SIGN (EITHER MANUALLY OR ELECTRONICALLY) THE ORDER FORM ISSUED TO YOU BY SUGARCRM.

UNLESS AND UNTIL COMPANY HAS AGREED TO BE BOUND BY ALL OF THE TERMS OF THE AGREEMENT, COMPANY HAS NOT BECOME A LICENSEE OF, AND IS NOT AUTHORIZED TO USE, THE SUGARCRM PRODUCT. THE "EFFECTIVE DATE" OF THIS AGREEMENT IS THE DAY THAT YOU CHECK THE "ACCEPT" BOX OR SIGN (EITHER MANUALLY OR ELECTRONICALLY) THE ORDER FORM ISSUED TO YOU BY SUGARCRM.

1. Subscription.

1.1. Subscription. During the Subscription Term, SugarCRM shall make the SugarCRM Product available to

I Accept

Printable View

Back

Next

6. The Setup Wizard then checks your Server environment for compatibility. If your environment passes the installation will continue. Otherwise, you will be prompted to correct any issues before you may proceed. Once the issues have been resolved, click "Re-check" to perform the compatibility check again and to continue installation.

System Check Acceptance

[Help](#)

Errors have been detected during compatibility check. In order for your SugarCRM Installation to function properly, please take the proper steps to address the issues listed below and either press the recheck button, or try installing again.

| Component   | Status  |
|---|---|
| <b>Writable Cache Sub-Directories</b>   | <b>The files or directories listed below are not writeable or are missing and cannot be created. Depending on your Operating System, correcting this may require you to change permissions on the files or parent directory (chmod 755), or to right click on the parent directory and uncheck the 'read only' option and apply it to all subfolders.</b> |
| <p>Please fix the following files or directories before proceeding:</p> <ul style="list-style-type: none"> <li>/Library/WebServer/Documents/ult6513/cache/images</li> <li>/Library/WebServer/Documents/ult6513/cache/layout</li> <li>/Library/WebServer/Documents/ult6513/cache/pdf</li> <li>/Library/WebServer/Documents/ult6513/cache/xml</li> <li>/Library/WebServer/Documents/ult6513/cache/include/javascript</li> </ul> <p style="text-align: center; margin-top: 10px;"><i>Location of your PHP configuration file (php.ini):</i><br/>/private/etc/php.ini</p> |   |

Help

Re-check

7. On the Installation Options page, enter in your download key and select the install type to perform.

**SUGAR ULTIMATE** SUGARCRM

### Installation Options

**Enter Download Key**

The key is required for general application functionality, but it is not required for installation. You do not need to enter the key at this time, but you will need to provide the key after you have installed the application.

**Choose Install Type**

- Typical Install**      Requires minimum information for the installation. Recommended for new users.
- Custom Install**      Provides additional options to set during the installation. Most of these options are also available after installation in the admin screens. Recommended for advanced users.

**Back** **Next**

- Typical Install : Provides minimal configuration options for a simple install.
- Custom Install : Provides additional configuration options such as Sugar URL, System Name, and Collation.

8. Select the database platform to install Sugar on. The listed database types generate from the database drivers currently installed in PHP on the server. If you do not see your expected database engine, please check your PHP configuration and restart your web server to reflect any changes made in the configuration.

**SUGAR ULTIMATE** SUGARCRM

### Database Type

**Specify Database Type**

What type of database will be used for the Sugar instance you are about to install?

**MySQL (mysqli extension)**

**Back** **Next**

9. Click "Next" to continue.

10. On the Database Configuration page, enter appropriate values for the following fields:

- Database Name : Name or designation of the database to be created and used with this installation of Sugar. If the database name entered is an existing database on the specified server, the existing database and its contents will be deleted and replaced with the Sugar database.

- Host Name : Name of the server or machine where the database will be created and used with this installation of Sugar.
- Database Administrator Username : Provide the user name of an administrative user who has proper permissions to create databases and tables on the specified database server.
- Database Admin Password : Provide the password of the specified administrative user.
  - Same as Admin User : Sugar will use the already provided database user name and password to connect to the database with.
  - Provide existing user : Enter credentials for a different database user for Sugar to connect to the database with.
  - Define user to create : Enter credentials to create a new user for Sugar to connect to the database with. Sugar Database Username : Select an option from the dropdown to determine the database user Sugar will connect with. Search Engine Type : Select an available search engine to utilize full-text searching in Sugar with. When selecting a full-text search engine, you must provide the Setup Wizard with the following fields:
    - Host : Enter the host name or IP address of the full-text search engine.
    - Port : Enter the port number for communicating with the full-text search engine. Defaults to 9200. All required fields are marked with a red asterisk and must be completed prior to continuing.
- Populate Database with Demo Data? : Select "Yes" to populate the database with demo records for testing Sugar with.

11. Click "Next" to continue.

**Provide Full-Text Search Settings**

To enable full-text searching, select the search engine type and enter the Host and Port where the search engine is hosted. Sugar includes built-in support for the elasticsearch engine.

|                           |  |
|---------------------------|--|
| <b>Search Engine Type</b> | <input type="text" value="elasticsearch"/> |
| <b>Host</b>               | <input type="text" value="localhost"/>     |
| <b>Port</b>               | <input type="text" value="9200"/>          |

12. On the Site Configuration page, enter appropriate values for the following fields:

- Sugar Application Admin Name : The Sugar administrative user name that you will use to log in for the first time upon successful installation. Defaults to admin.
- Sugar Admin User Password : A password for the Sugar administrative user that you will use to log in for the first time upon successful installation
- Re-enter Sugar Admin User Password : A confirmation of the provided

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password to ensure it was entered correctly

13. When running a custom install instead of a typical, you will have access to the following fields as well:

- URL of Sugar Instance : Enter the URL used to access your Sugar instance. This value is important for various integrations to function properly and is generally desired to be a publicly accessible URL where possible.
- System Name : Enter the name of your Sugar instance to be displayed in the browser title bar.
- Collation Settings : Select the proper collation setting to use when creating the database tables. The collation determines the character set and default sorting options. Defaults to utf8\_general\_ci.

14. Click "Next" to continue.

After installation, you will need to use the Sugar admin user (default username = admin) to log in to the Sugar instance. Enter a password for this administrator user. This password can be changed after the initial login. You may also enter another admin username to use besides the default value provided.

\* Sugar Application Admin Name

\* Sugar Admin User Password

\* Re-enter Sugar Admin User Password

15. If typical Install was selected, you will be taken to the Confirm Settings page. If custom install was selected, you will be taken to the Site Security page. On this page, select the desired options from the following list:

- Automatically Check For Updates? : When selected, Sugar will periodically check for updates to Sugar.
- Use a Custom Session Directory for Sugar : When selected, you can provide a secure folder for storing Sugar session information. This can be done to prevent session data from being vulnerable on shared servers or from conflicting with other session data stored on the server for other applications.
- Use a Custom Log Directory : When selected, you can specify a directory to store the Sugar log. Regardless of where the log file is located, access to it through a web browser will be restricted via a .htaccess redirect.
- Provide Your Own Application ID : When selected, you can provide an application ID to override the auto-generated ID. This ID should always be unique when compared to any other instances hosted on the same server. This value is utilized by PHP caching engines (e.g. APC, Memcache, etc.) to distinguish the proper files to serve.

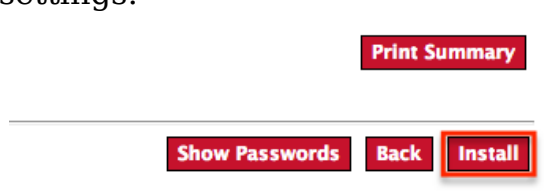
16. Click "Next" to proceed to the Confirm Settings page.

17. On the Confirm Settings page, please review the settings selected for you install of Sugar. If any settings need to be modified, click "Back" to navigate backwards in the install process to revisit any settings. Optionally you may select "Show Passwords" to verify the correct password have been entered

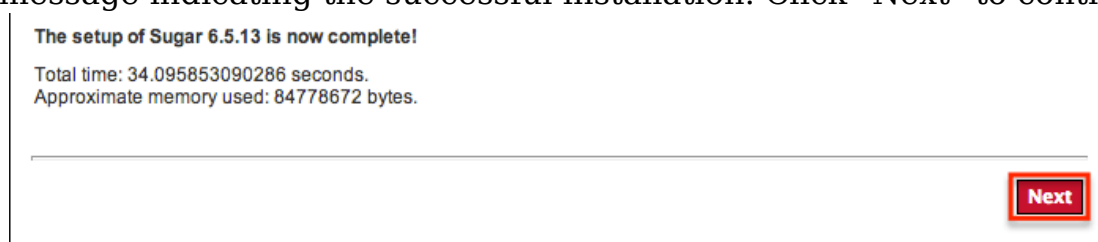


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into the configuration before installing. You may also click "Print Summary" to be able to print the summary of information before installing. Once the settings have been confirmed, click "Install" to install Sugar with the provided settings.



18. The Perform Setup page is displayed and will contain the progress and results of the installation of Sugar. The installation is complete when you receive a message indicating the successful installation. Click "Next" to continue.



19. If Custom Install was selected you will have the option to install language packs. Language packs can also be installed through the application later. Click "Next" to continue.
20. You can optionally register your information with SugarCRM on the Product Registration page. To register, fill in the available fields with your contact information and click "Submit". Once registration is complete, or to skip registration, click "Next".
21. This displays the Sugar login page. You can now login to Sugar with the admin user name and password specified during installation.

## Upgrading

To get the most out of Sugar we recommend being on the latest version. Newer versions of Sugar come with increased performance, bug fixes, and new features in general.

Before upgrading Sugar it is highly recommended to run the upgrade on a test or backup copy of your production system first. This will not only allow you to be familiar with the process, but can point out any potential issue you may encounter when upgrading production. We also recommend checking the [Support Platforms](#) page before upgrading to make sure your current technology is still supported on the version you are upgrading to.

To obtain the correct backup files, please follow the directions in the [Downloading Sugar](#) section except download the proper upgrade zip file matching your current version of Sugar and the desired upgraded version.

---

## Prerequisites

Before performing an upgrade there are some prerequisites that should be followed to ensure a successful upgrade.

- Backup your current Sugar directory on the web server and the database.
- Verify the PHP `post_max_size` and `upload_max_filesize` settings are larger than the size of the upgrade zip file. These settings can be verified by performing a `http://us.php.net/manual/en/function.phpinfo.php` function or by checking the `php.ini` file.
- Verify the user the web server is running under has read and write permissions to the Sugar directory as well as the `config.php` file in the Sugar directory.
- If you have made code level changes to a file, verify the changes are in the custom directory or they may be removed during the upgrade.
- If op-code caching is enabled in PHP, disable it to ensure cached code is not used during the upgrade. Op-code caching can be re-enabled after the upgrade is complete.
- If you are using Zend Core 2.0, increase the values for `ConnectionTimeout` to 3000 seconds and `RequestTimeout` to 6000 seconds.
- If you are running on IIS7, add the following code to the `web.config` file:

```
<security>
  <requestfiltering>
    <requestlimits
maxallowedcontentlength="1000000000"></requestlimits>
  </requestfiltering>
</security>
```

- If you are running on IIS, set the CGI script timeout to be 1800 seconds (30 minutes) to ensure the CGI application does not time out during the upgrade.
- If you are running on Apache, set the `LimitRequestBody` value in the `httpd.conf` file to 2GB.

## Upgrading Via Upgrade Wizard

The Upgrade Wizard provides a quick and easy way to upgrade a Sugar instance to a newer version. The Upgrade Wizard is only available to administrative users and can be accessed via Admin > Upgrade Wizard.

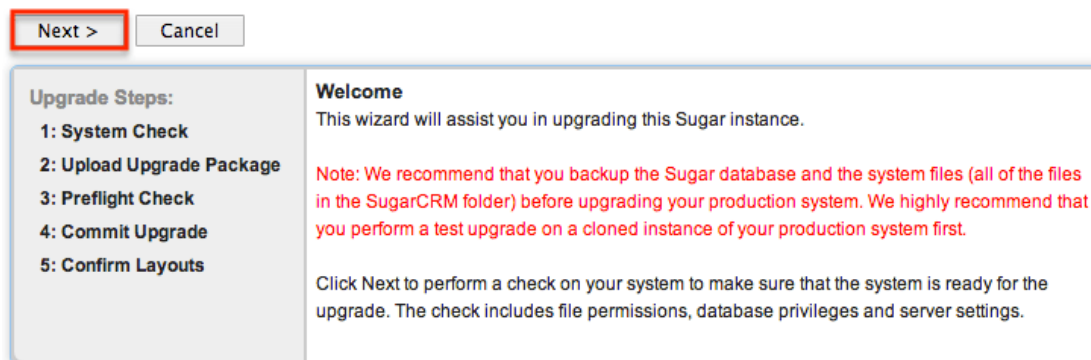
Note: If your database contains more than 10,000 records per table, we recommend [Upgrading Via Silent Upgrader](#) instead of using the Upgrade Wizard. Manual upgrades by file replacements and running SQL upgrade statements are

not supported.

Use the following steps to perform an upgrade using the Upgrade Wizard:

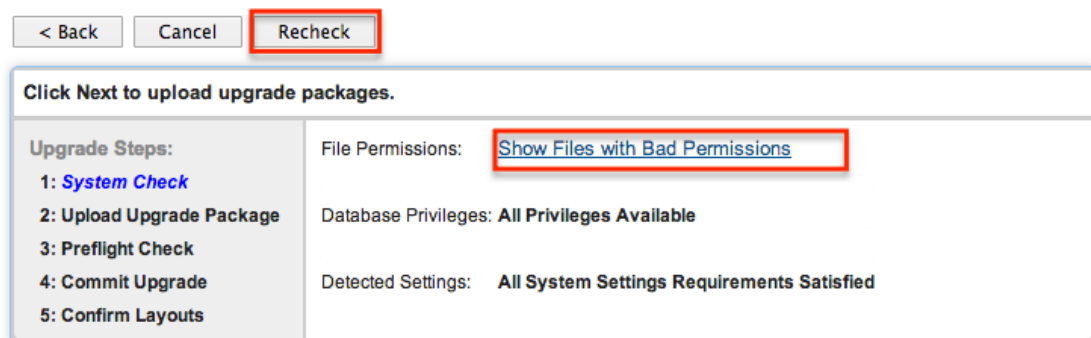
1. Obtain the correct upgrade files by following the directions in the [Downloading Sugar](#) section except download the proper upgrade zip file from the Upgrades section. The upgrade files specify the from and to versions of Sugar in the file name. The from version must match the current version of Sugar to be able to perform the upgrade. For example, to upgrade a Professional 6.5.7 instance of Sugar to 6.5.13, you would need the SugarPro-Upgrade-6.5.x-to-6.5.13.zip file.
2. Logged in as an administrator, navigate to Admin > Upgrade Wizard to launch the Upgrade Wizard.
3. On the Welcome page, click "Next" to start the upgrade steps.

Welcome



4. A system check is performed to verify the instance is ready to be upgraded. If any of the checks fail, click the link next to the failed check to remedy the failed check.

System Check



Once the issues have been resolved, click "Recheck" to run the system check again.

5. After the system check passes, click "Next" to continue.

## System Check

< Back **Next >** Cancel Recheck

Click Next to upload upgrade packages.

### Upgrade Steps:

- 1: **System Check**
- 2: Upload Upgrade Package
- 3: Preflight Check
- 4: Commit Upgrade
- 5: Confirm Layouts

File Permissions: **All Files Writable**

Database Privileges: **All Privileges Available**

Detected Settings: **All System Settings Requirements Satisfied**

6. On the Upload Upgrade Package page, select "Choose File" to browse to the upgrade zip file downloaded on Step 1 and click "Upload Package".

## Upload Upgrade Package

< Back Next > Cancel

### Upgrade Steps:

- 1: System Check
- 2: **Upload Upgrade Package**
- 3: Preflight Check
- 4: Commit Upgrade
- 5: Confirm Layouts

Select File: **Choose File** SugarPro-Upgr...to-6.5.13.zip

**Upload Package**

The following upgrade packages are ready to be installed:

| Name | Type | Version | Date Published | Uninstallable | Description |
|------|------|---------|----------------|---------------|-------------|
| None |      |         |                |               |             |

7. Once the upgrade file has been uploaded, it will appear in the center section indicating it is ready to be installed.

The following upgrade packages are ready to be installed:

| Name   | Type  | Version | Date Published         | Uninstallable | Description | Action         |
|--|-------|---------|------------------------|---------------|-------------|----------------|
|  SugarPro | Patch | 6.5.13  | 2013-05-08<br>14:29:12 | No            | None        | Delete Package |

The bottom section of the Upload Upgrade Package page will show previously installed upgrade packages for this instance.

The following upgrade packages have been installed:

| Name   | Type  | Version | Date Installed   | Description | Action         |
|--|-------|---------|------------------|-------------|----------------|
|  SugarPro | patch | 6.5.7   | 12/11/2012 17:10 | None        | Delete Package |

8. Click "Next" to perform the Preflight Check. If all checks have passed, click "Next" to begin the upgrade.

## Preflight Check

**Next >** Cancel Recheck

Click Next to copy the upgraded files to the system.

|   |  |
|---|--|
| <b>Upgrade Steps:</b><br>1: System Check<br>2: Upload Upgrade Package<br>3: <b>Preflight Check</b><br>4: Commit Upgrade<br>5: Confirm Layouts | All preflight tests have passed.<br><br><b>Note:</b> The rest of the upgrade process is mandatory, and clicking Next will require you to complete the process. If you do not wish to proceed, click the Cancel button. |
|---|--|

Note: After clicking "Next" on this screen, you must complete the rest of the upgrade process. If you do not wish to proceed you can click "Cancel" to safely abort the upgrade process at this point.

- The files from the upgrade package are extracted and copied into your system. Once the files have been copied you will be taken to the Commit Upgrade page. Here you may click "Show" to view the files that were copied. Click "Next" to continue with the upgrade.

## Commit Upgrade

**Next >**

Click Next to run additional upgrade scripts.

|   |   |
|---|---|
| <b>Upgrade Steps:</b><br>1: System Check<br>2: Upload Upgrade Package<br>3: Preflight Check<br>4: <b>Commit Upgrade</b><br>5: Confirm Layouts | <b>Files Copied Successfully</b><br><b>Show</b> |
|---|---|

- Next the upgrade scripts will run, creating new fields and performing a three-way merge between the customized instance on the old version, the default instance on the old version, and the default instance on the new version. The merge performs the following operations:
  - Adds new fields to the default module layouts.  
Note: If you restore a layout to default in Studio, it will be the latest version's default, not the original version's default.
  - Adds new fields to the current module layouts if the layouts have not been customized through Studio.
  - Provides the option to add new fields to customized layouts. On the Confirm Layouts page, deselect any modules you do not wish to have the new fields added to. The fields will be available to be manually added later, if desired. Click "Next" to confirm the layout changes and continue the upgrade.

## Confirm Layouts

**Next >**

**Click Next to confirm changes and to finish the upgrade.**

**Upgrade Steps:**

- 1: System Check
- 2: Upload Upgrade Package
- 3: Preflight Check
- 4: Commit Upgrade
- 5: **Confirm Layouts**

There are new fields available which have been added as part of this upgrade and can't be added to existing module layouts. To learn more about the new fields, please refer to the Release Notes for upgrading.

If you do not wish to append the new fields, please uncheck the module, and your custom fields will be available in Studio after the upgrade.

| Module                                       | Layouts                                      |
|--|--|
| <input checked="" type="checkbox"/> Accounts | EditView<br>DetailView<br>ListView           |
| <input checked="" type="checkbox"/> Calls    | EditView<br>DetailView<br>ListView           |
| <input checked="" type="checkbox"/> Cases    | EditView<br>DetailView<br>ListView<br>Search |

11. The Confirm Layouts page will then show the successfully merged layouts. Click "Next" to finish the upgrade.

## Confirm Layouts

**Next >**

**Click Next to complete the upgrade.**

**Upgrade Steps:**

- 1: System Check
- 2: Upload Upgrade Package
- 3: Preflight Check
- 4: Commit Upgrade
- 5: **Confirm Layouts**

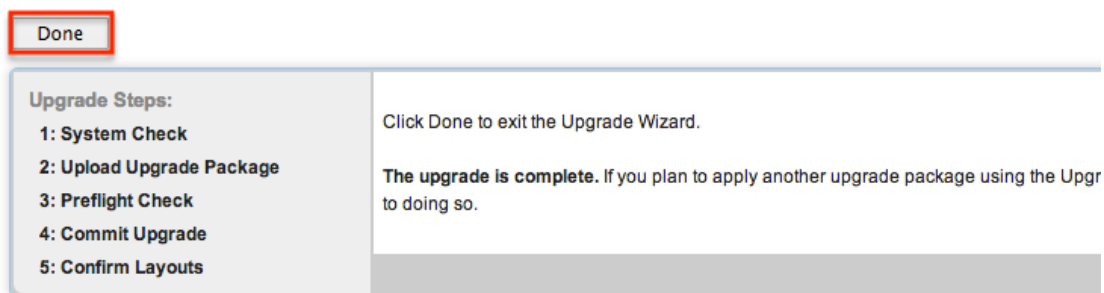
The following layouts were merged successfully:

| Module   | Layouts                                      |
|----------|--|
| Accounts | EditView<br>DetailView<br>ListView           |
| Calls    | EditView<br>DetailView<br>ListView           |
| Cases    | EditView<br>DetailView<br>ListView<br>Search |

12. The last page of the Upgrade Wizard will show a confirmation of the upgrade. Click "Done" to exit the Upgrade Wizard.

---

## Debrief



13. This takes you to the About page confirming the new version your instance is running on.
14. As a final cleanup, navigate to Admin > Repair and perform "Quick Repair and Rebuild" and "Rebuild Relationships". For more information on the functions performed by the repair, please refer to the [Repair](#) documentation in the Administration guide.
15. If you are going to perform multiple upgrades to Sugar, please logout of the application and log back in after each upgrade package.

## Upgrading Via Silent Upgrader

The Silent Upgrader is a command line script that enables administrators to avoid some limitations of the server environment PHP and potentially the web server have settings that can put too tight of restrictions on the upload size or session timeouts. The Silent Upgrader either avoids the limitations or better controls the settings in its stand-alone execution environment.

Note: The Silent Upgrader script creates new files for the user logged in running the script. For example, for the root user it creates files as user/group root. Since Apache cannot read this, you must ensure that the web server user has the permissions to read and write the script.

Use the following steps to perform an upgrade using the Silent Upgrader:

1. Obtain the correct upgrade files by following the directions in the [Downloading Sugar](#) section except download the silentUpgrade zip file and the proper upgrade file from the Upgrades section. The upgrade files specify the from and to versions of Sugar in the file name. The from version must match the current version of Sugar to be able to perform the upgrade. For example, to silent upgrade a Professional 6.5.7 instance of Sugar to 6.5.13, you would need the silentUpgrade-PRO-6.5.13.zip file and the SugarPro-Upgrade-6.5.x-to-6.5.13.zip file.
2. Extract the contents of the silentUpgrade zip file on the web server.
3. From the command line of the web server, navigate to the extracted

---

silentUpgrade contents and execute the following command:

```
php -f silentUpgrade.php <upgradeZipFile> <logFile>
<pathToSugarInstance> <adminUser>
```

Note: Linux and Mac OSX based servers will need to call php with no extension where Windows based servers will call php.exe. In order to be able to call php.exe from any directory in the Windows command prompt you must configure your system's environmental path variables to reference PHP's installation path.

Populate the parameters brackets above for the specific values in your situation.

- <upgradeZipFile> : The full file path to the upgrade zip file.
- <logFile> : The path to the log file to store the results of the silent upgrade. A relative path to the Sugar instance may be used.
- <pathToSugarInstance> : The full file path to the instance being upgraded.
- <adminUser> : A valid administrative user name. For example, running

Apache on Mac OSX where Sugar is located at

/Library/WebServer/Documents/sugarcrm/ and the upgrade zip file and the extracted contents of the silentUpgrade zip file are all located in

/Library/WebServer/Documents/upgrade/, to perform a silent upgrade with

the user "admin" and a log file of "silentUpgrade\_6513.log", execute the following commands:

```
cd /Library/WebServer/Documents/upgrade/
```

```
php -f silentUpgrade.php
```

```
/Library/WebServer/Documents/upgrade/SugarPro-Upgrade-6.5.x-to-6.5
.13.zip ./silentUpgrade_6513.log
```

```
/Library/WebServer/Documents/sugarcrm/ admin
```

4. The upgrade will begin, and the results will be printed in the command line. Optionally check the specified log file for any errors or details about the upgrade.
5. Log into Sugar and as a final cleanup, navigate to Admin > Repair and perform "Quick Repair and Rebuild" and "Rebuild Relationships". For more information on the functions performed by the repair, please refer to the [Repair](#) documentation in the Administration guide.

## Converting Sugar Editions

The Upgrade Wizard allows administrators to convert the edition of Sugar. Not all editions can be converted to from all editions. The following editions can be converted from and to:

| From Edition      | To Edition                                    |
|-------------------|---|
| Community Edition | Professional, Corporate, Enterprise, Ultimate |



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|              |                                 |
|--------------|---------------------------------|
| Professional | Corporate, Enterprise, Ultimate |
| Corporate    | Enterprise, Ultimate            |
| Enterprise   | Ultimate                        |

Use the following steps to convert Sugar to a different edition:

1. Obtain the Sugar license key from your sales representative for the edition you would like to convert to.
2. Upgrade your current edition to the latest patch release. For example, if you version is on Professional 6.5.7, you will need to upgrade to the highest available version in the 6.5.x release path before converting.
3. Obtain the correct conversion file by following the directions in the [Downloading Sugar](#) section except download the proper conversion file from the Conversions section. The conversion files specify the from and to editions of Sugar in the file name. The from edition must match the current edition of Sugar to be able to perform the conversion. For example, to convert a Professional edition of Sugar to Enterprise, you would need the SugarPro-to-SugarEnt-Conversion-6.5.13.zip file.
4. Follow the steps in the [Upgrading Via Upgrade Wizard](#) section to perform the edition conversion.

## Uninstalling Sugar

Use the following steps to uninstall an instance of Sugar:

1. Navigate to the web server where Sugar is installed and delete the Sugar root directory.
2. Navigate to the Sugar database using a database management system or command line and delete the Sugar database from the server.

Note: It is highly recommended to create a backup of the file directory and database before deleting.

## Advanced Configuration

After installing Sugar, there are some advanced configurations that you can take advantage of. During the installation, Sugar attempts to create a .htaccess file in the Sugar root directory. This file helps to ensure certain files are not accessible through a web browser. The contents of this file should contain:

```
# BEGIN SUGARCRM RESTRICTIONS
```

---

```

RedirectMatch 403 (?i).*\.log$
RedirectMatch 403 (?i)/+not_imported_.*\.txt
RedirectMatch 403
(?i)/+(soap|cache|xtemplate|data|examples|include|log4php|metadata|mod
ules)/+.*\.(php|tpl)
RedirectMatch 403 (?i)/+emailmandelivery\.php
RedirectMatch 403 (?i)/+upload
RedirectMatch 403 (?i)/+custom/+blowfish
RedirectMatch 403 (?i)/+cache/+diagnostic
RedirectMatch 403 (?i)/+files\.md5$
# END SUGARCRM RESTRICTIONS

<FilesMatch "\.(jpg|png|gif|js|css|ico)$">
    <IfModule mod_headers.c>
        Header set ETag ""
        Header set Cache-Control "max-age=2592000"
        Header set Expires "01 Jan 2112 00:00:00 GMT"
    </IfModule>
</FilesMatch>
<IfModule mod_expires.c>
    ExpiresByType text/css "access plus 1 month"
    ExpiresByType text/javascript "access plus 1 month"
    ExpiresByType application/x-javascript "access plus 1 month"
    ExpiresByType image/gif "access plus 1 month"
    ExpiresByType image/jpg "access plus 1 month"
    ExpiresByType image/png "access plus 1 month"
</IfModule>

```

To verify these restrictions are in place in your instance, attempt to navigate to the `sugarcrm.log` file through a supported web browser ( `http://<Server Location>/sugarcrm/sugarcrm.log` ). If the restrictions are properly in place, you will receive a `#403 Forbidden` error. If you do not receive this error, you are either missing the `.htaccess` file or your web server is not configured to allow a `.htaccess` file. For more information on enabling a `.htaccess` file for your web server, please refer to your web server provider's documentation.

Sugar comes with many different advanced configuration options such as:

- System Configuration
- Security Options
- Performance
- Disabling Automatic Searches
- Elastic Search Configuration

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For more information regarding these topics and more configuration options, please refer to the [Advanced Configuration Options](#) documentation in the Administration guide.

Last Modified: 03/27/2017 08:07pm