SUGARCRM.

Sugar Enterprise 6.2 Offline Client Guide

Overview

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

The number of Offline Client licenses that you receive is equivalent to the number of Sugar Enterprise licenses that you purchase. The administrator can view this number on the License Management page of Sugar Enterprise.

You can use the Sugar Offline Client, which is only supported on Microsoft Windows platform, for the following subset of Sugar modules:

- Home

- Activities

- Accounts

- Contacts

- Leads

- Opportunities

- Quotes

- Products

- Forecasts

Note:	Documents attached to notes, Home page configurations (including multiple Home pages) are not synchronized from the Client to the Sugar server. You cannot send emails or log audit operations through the Sugar Offline Client. The Sugar Offline Client does not support custom modules.

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 Sugar 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 Offline Client user needs to specify one of the following options when synchronizing data:

- 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. The Offline Client 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.

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

Installation prerequisites

In order to allow a Sugar user to log into the Sugar Offline Client, the administrator must enable the individual 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.
To enable the Sugar Offline Client user

1. In the Users sub-panel of the Administration Home page, click User Management to view a list of current users.

2. Open the record of the user that you want to enable as an Offline Client user.

3. In the User Settings sub-panel, from the Offline Client Status drop-down list. select **Active**.

4. 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, is comprised of the following components:

- Apache: version 2.0.59

- MySQL: version 5.0.26

- PHP: version 5.2.5

If you already have a WAMP stack from an older version of the Sugar Offline Client, see Installing Sugar Offline Client with existing WAMPStack.
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 between the server and the client.

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

Run the Sugar Offline Client Installer

1. Run the Sugar Offline Client installer for the appropriate Sugar server.

Install Sugar-OfflineClient-ENT-6.2.0-windows-installer.exedepending on your Sugar edition. Browse to the location of the installer.exe file and double-click it to begin the installation process
This displays the Welcome page.

2. Click **Next**.

The License Agreement window displays on the page.

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

The Installation Directory window displays on the page.

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

The DB Port screen displays the default MySQL database port number. If necessary, you can change the port number.

5. Click Next.

The Web Server Port screen displays the default port number for the Apache Web Server. If necessary, you can change the port number.

6. Click Next.

This displays the System Name page with the IP address

7. Replace this with a name for your Sugar instance URL and click Next.

This displays the SugarCRM Server URL page.

8. Enter your Sugar server URL and click **Next**.

This displays the Install as a service page.

9. Select Yes if you want to start the Offline Client automatically when the machine is started. If not, select No.

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

Note: The user must already exist in the Sugar database. You cannot create a new user through the Offline Client installer.

11. Enter the user password, re-enter it, and click **Next**.

This displays the Install as a service page.

12. Select **Yes** to automatically start the Apache Server and the MySQL database services whenever you start your machine. If not, select **No**.

This displays the Ready to Install page.

13. Click **Next**.

This displays the installing page and initiates the installation and configuration process. Click **Unblock** if the Windows Security Alert window displays as 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? option that is enabled by default.

14. Keep the default setting and click **Finish**.

This displays the Sugar Login page.
Enter your Sugar user name and password.

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

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

The Offline Client URL and port number are listed in the install-summary.txt file.

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 server and 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. You can accept the default since there are no conflicts during the initial synchronization. For more information on conflict resolution, see Overview.

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 window with a synchronization summary displays on the screen:
When synchronization completes, the Done button displays under the Total Progress bar.

4.   Click **Done**.

The Home page displays on the screen. 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.

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.

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

1. Locate the file that was used to install the Sugar server, for example Sugar ENT install.zip.

2. Make a copy of the .zip file and give it a different name such as SugarENT-OC-6.2.0.zip.

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-6.2.0.zip with the config.php file that you created in Step 3.

5. Distribute the SugarENT-OC-6.2.0.zip file 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-6.2.0.zip and install the Sugar application as described in *Sugar Enterprise* Application Guide.

Note: Users must ensure that they append install.php to the URL to access the application successfully. For example, http://localhost/sugarcrm_oc/install.php.

Upgrading Sugar Offline Client

Follow the steps listed below to upgrade to Sugar Offline Client 6.2.0:

1. Run the 6.2.0 version of the Sugar application.

2. Perform a synchronization from your current Sugar Offline Client to the 6.2.0 Sugar application.

The Sugar server automatically upgrades your current Sugar Offline Client to version 6.2.0 during synchronization.
Follow the steps listed below to successfully upload the Upgrade zip file before upgrading:

1. Navigate to the php.ini file on your system.

2. Change the post_max_size and upload_max_filesize settings to at least 60MB.

3. Restart Apache.

4.   Start the upgrade process.

Managing 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.

Sugar Offline Client Management for Users

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

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

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

¢   All: Start, stop, or restart the WAMP Stack.

¢   Apache: Start, stop, or restart the Apache Server.

¢   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: 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 an 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 in the Server instance. The administrator can activate, deactivate, and delete Offline Client instances from this page.
To manage Sugar Offline Client instances

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

The Administration Home page displays on the screen.

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.

- 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.

- 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. This icon displays only for deactivated users.

The system displays a message requesting confirmation of your action; click OK to confirm the deactivation.

- 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.

- 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 Community Edition?

No. The Sugar Offline Client can be used with Sugar Ultimate and Sugar Enterprise editions only.

2. We use Sugar 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 On Demand. Can we use the Sugar Offline Client with this configuration?

Yes. The Offline Client can be used equivalently with Sugar On Demand and Sugar On-Premise.

4. Can I customize the Sugar 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 versions on the server and the client?

No. The Sugar version that exists on the server must match the Sugar version that resides on the client machine.

6.   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.

7.   Can the PC be used to connect to the server system?

Yes. The Sync -> Go Online menu option exists for this purpose.

8.   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. This applies only to records of modules that are supported in the Sugar Offline Client.

9.   Why is the WAMP stack required?

Sugar Offline Client is based on the same technology as the Sugar application residing on your server, except that only Sales-related modules are available on the Sugar Offline Client. The Sugar Offline Client needs the WAMP stack because the Offline Client uses much of the same implementation as the server application.

10.   How do I increase the Sugar Offline Client licenses?

The number of Offline Client licenses you have is the same as the number of Sugar Enterprise licenses that you purchased. Hence, you must purchase additional Enterprise licenses to increase your number of Offline Client licenses.