
Sugar Enterprise 6.7 Offline Client Guide

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Sugar Enterprise 6.7 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 licenses that you purchase. The administrator can view this number on the License Management page of the Sugar application.

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

- Home
- Activities
- Accounts
- Contacts
- Leads
- Opportunities
- Quotes
- Products

Note: Forecasting module is not available in Sugar Offline Client version 6.7.0.

Documents attached to Notes, Home page configurations (including multiple Home pages) are not synchronized from the Offline Client to the Sugar server. You cannot send emails or log audit operations through the Sugar Offline Client. 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.

Conflict resolution

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

Tip: Synchronize data frequently to avoid conflicts.

Installation prerequisites

The administrator must enable individual users as a Sugar Offline Client to allow the Sugar user to log into the Sugar Offline Client.

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](#).

Follow the steps listed below to enable the Sugar Offline Client user:

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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. Select Edit in the Detail View page of the user record.
 4. Click the Advanced tab.
 5. In the User Settings sub-panel, go to the Offline Client Status drop-down list and select Active.
 6. Click Save.

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
- 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-ULT-6.7.0-windows-installer.exe depending 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. This displays the The License Agreement page.
3. Accept the agreement and click Next. This displays the Installation Directory page.
4. Accept the default location or enter a new location and click Next. The DB Port page displays the default MySQL database port number. Change

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- the port number, if required.
5. Click Next.
The Web Server Port page displays the default port number for the Apache Web Server. Change the port number, if required.
 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.
 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 username 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, at your convenience. 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.

Follow the steps listed below to synchronize the Offline Client:

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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, see [Conflict Resolution](#).
 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, records accessible to the user are synchronized.
This displays a page with the synchronization summary.
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.

Upgrading Sugar Offline Client

Follow the steps listed below to upgrade to Sugar Offline Client 6.7.0:

1. Run the 6.7.0 version of the Sugar application.
2. Perform a synchronization from your current Sugar Offline Client to the 6.7.0 Sugar application.
The Sugar server automatically upgrades your current Sugar Offline Client to version 6.7.0 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.

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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 Client to start and stop any of the stack components, or to uninstall the stack.

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

Run Sugar: Select this option and then 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.

Follow the steps listed below to manage Sugar Offline Client instances:

1. Log into Sugar as an administrator and go to the Admin panel.
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. This 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

Q: Can we use the Offline Client on Sugar Community Edition?

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

Q: We use Sugar with Oracle database on our server. Can we use the Sugar Offline Client with this configuration?

A: Yes. There are no differences in the Sugar Offline Client's functionality arising from your choice of server databases.

Q: We use Sugar On-Demand. Can we use the Sugar Offline Client with this configuration?

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

Q: Can I customize the Sugar application when I have the Sugar Offline Client?

A: 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.)

Q: Can I run dissimilar Sugar versions on the server and the client?

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

Q: Can a given Offline Client instance be used by multiple users?

A: 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.

Q: Can the PC be used to connect to the server system?

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

Q: What records will the Offline Client user be able to see?

A: 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.

Q: Why is the WAMP stack required?

A: 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.

Q: How do I increase the Sugar Offline Client licenses?

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

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