



# MANUAL DE INSTALACIÓN DE SUGAR CRM



## Instalación del SugarCRM

#### Descarga e instalación de SugarCRM en máquinas Linux

1.- Instalación de paquetes requeridos:

- apache2
- libapache2-mod-php4
- php4-common
- php4-gd2 (php4-gd)
- php4-mysql
- mysql-server (4.1 o posterior)
- mysql-client
- php4-imap (en el caso de querer utilizar el módulo Zuckermail para recibir correo IMAP)

2.- Descargar el paquete de SugarCRM desde página la <u>página de descargas de SugarCRM.</u> En este caso se trata de la versión 4.5.0f.

3.- Descomprimir el paquete en el directorio /var/www/ y llamarle del modo en el que se quiera luego acceder a él. Su acceso será del tipo <u>http://ip-de-la-máquina/sugar-ejemplo/</u>.

4.- Asignar los permisos adecuados a ciertos directorios o archivos:

#Debido a que apache utiliza por defecto el usuario www-data, hay que asignarle permisos a dicho usuario para el directorio del sugarcrm.

chown -R www-data:www-data /var/www/sugar-ejemplo

#Apache necesita acceso para ciertos directorios y el archivo de configuración para funcionar correctamente. Hay que asignar los permisos del siguiente modo:

chmod -R 755 /var/www/sugar.example.com

chmod -R 775 /var/www/sugar.example.com/cache

chmod -R 775 /var/www/sugar.example.com/custom

chmod -R 775 /var/www/sugar.example.com/data

chmod -R 775 /var/www/sugar.example.com/modules

chmod 774 /var/www/sugar.example.com/config.php

5.- Creación de la base de datos de sugarcrm. Puede crearse desde la propia consola de mysql o instalarse el paquete phpmyadmin mediante el cual pueden controlarse las bases de datos mediante una interfaz web. Simplemente hay que crear dicha base de datos y nada más. El propio instalador del SugarCRM creará luego las tablas necesarias para su funcionamiento. También puede uno evitarse este paso indicando posteriormente en el instalador del sugarcrm que desea que sea él quien cree la base de datos y sus tablas correspondientes.

6.- Acceder a <u>http://ip-de-la-máquina/sugar-ejemplo/</u>. Esta primera vez se lanzará el instalador del SugarCRM, con el que no debería haber ningún problema habiendo seguido los pasos aquí explicados. En la instalación se comprueban los permisos, se comprueba si está creada la base de datos, se asignan las contraseñas para la base de datos y para el administrador del Sugar y se procede a la instalación del mismo.



7.- Si la instalación se ha realizado con éxito, acceder de nuevo a <u>http://ip-de-la-máquina/sugar-</u><u>ejemplo/</u> donde esta vez se requerirá ya el nombre de usuario y contraseña para acceder an CRM.

#### Configuración de SugarCRM en máquinas Linux o Windows.

PASO 0: Selección de idioma



PASO 1: Aceptación de la licencia

Step 1: License Acceptance		RM.
SUGAR OPEN SOURCE.		
The Sugar Public License Version 1.1.3 ("SPL") consists of the License Version 1.1, modified to be specific to SugarCRM, with Terms in Exhibit B. The original Mozilla Public License 1.1 cas http://www.mozilla.org/MPL/MPL-1.1.html	Mozilla Public the Additional n be found at:	-
SUGARCRM PUBLIC LICENSE Version 1.1.3		
1. Definitions.		
<ol> <li>1.0.1. "Commercial Use" means distribution or otherwise making Code available to a third party.</li> <li>1.1. "Contributor" means each entity that creates or contribute creation of Modifications.</li> </ol>	the Covered es to the	
1.2. "Contributor Version" means the combination of the Origina Modifications used by a Contributor, and the Modifications made	al Code, prior e by that	
₩ LAccept	Printable View	1
	Help Back N	ext



**PASO 2**: Requerimientos del sistema : Todos los estados tienen que estar en verde para poder proseguir con la instalación.

Step 2: System Check Accep	sugarcem.
In order for your SugarCRM installation t listed below are green. If any are red, plo	o function properly, please ensure all of the system check items ease take the necessary steps to fix them.
Component	Status
PHP Version	OK (ver 5.1.1 )
MySQL Database	OF
MB Strings Module	09
XML Parsing	0
PHP Safe Mode Turned Off	0
PHP Allow Call Time Pass Reference T On	'urned OF
PHP Memory Limit >= 32M	OK (Unlimited
Writable SugarCRM Configuration File (config.php)	0
Writable Custom Directory	0
Writable Modules Sub-Directories and	Files Of
Writable Data Sub-Directories	0
Writable Cache Sub-Directories	0
Writable Session Save Path (C:IProgra Files/xampp/tmp)	im Oł
Optional Components	Status
IMAP Module	0
cURL Module	Not found: Sugar Scheduler will run with limited functionality
PHP-JSON Module (v 1.1.1)	Not found: The PHP-JSON PHP module reaps enormous performance benefits
ZLIB Compression Module	0
Note: Your pl C:\Prog	ip configuration file (php.ini) is located at: ram Filestxamoplapachelbiniphp.ini
	Help Re-check Back Next

**PASO 3**: Configuración de la base de datos : Si no está creada previamente hay que recordar marcar la casilla en la que se le solicita a sugarcrm que la cree. También habrá que indicar el usuario y contraseña del usuario que gestiona todas las bases de datos (usuario privilegiado).

Step 3: Database Configuration		SUGARCRM
Please enter your database configuration information that you use the default values.	below. If you are un	sure of what to fill in, we suggest
* Required field		
Database Configuration		
* Host Name / Host Instance	localhost	
Database Name	sugarcrm	Create Database
* Database Username	sugarcrm	Create User
Database Password		
Drop and Recreate Existing Sugar tables? Caution: All Sugar data will be erased if this box is checked.	F	
Populate Database with Demo Data?	Г	
Database Account Above Is a Privileged User?	<b>v</b>	
		Help Back Next



**PASO 4**: Configuración del Sitio Web : Hay que indicar cual será la ruta para acceder a nuestra instalación de sugarcrm y cual será la contraseña del usuario *admin* que se crea por defecto.

e unsure of the fields, we suggest that you
http://localhost/SugarSuite-Full-4.5.0
P
<b>u</b>
2

PASO 5: Configuración de Locales y de Idioma .

otep o. Locale octalige a Language i ack	SUGARCRM.
If you would like to install a language pack other than the de Otherwise, click "Next" to continue to the next step.	efault of US-English, please do so below.
Language Pack	
Upload a Language Pack:	Upload
The following language packs are ready to be installed: Name Version Date Published Uninstallable Description none	
The following language packs have been installed: Name Version Date Published Uninstallable Description none Locale Settings	
Adjust your SugarCRM Locale settings below.	
User Interface	
User Interface Default Date Format	2006-12-23 💌
User Interface Default Date Format: Default Time Format:	2006-12-23 ¥ 23:00 ¥
User Interface Default Date Format: Default Time Format: Default Language:	2006-12-23 V 23:00 V US English V
User Interface Default Date Format Default Time Format Default Language: Default Name Format	2008-12-23 V 23:00 V US English V s 11 Unde finedunde finedun
User Interface Default Date Format Default Language: Default Name Format	2008-12-23 V US Englah V s f1 Unde finedunde finedun "5" Salutation "F First Name
User Interface Default Date Format: Default Language: Default Name Format: Dutbound Email Character Set	2006-12-23 V 23:00 V US English V s f1 undefinedundefinedun "5" Salufation "F First Name T Last Name
User Interface Default Date Format: Default Language: Default Name Format: Dutbound Email Character Set Set this to the character set most commonly used in your ocale:	2006-12-23 V US Englah V a f1 Unde finedunde finedun "5" Salutation "F First Name US-8859-1 (Western European and US)
User Interface Default Date Format: Default Language: Default Name Format: Dutbound Email Character Set Set this to the character set most commonly used in your locale: Export Settings	2008-12-23 V 23:00 V US English V s 11 Unde finedunde finedun "5" Satutation "F First Name T Last Name SO-8859-1 (Western European and US) V
User Interface Default Date Format: Default Language: Default Name Format: Dutbound Email Character Set Set this to the character set most commonly used in your ocale: Export Settings mport/Export Character Set (Email, .csv, vCard, PDF, data mport):	2008-12-23 V 23:00 V US English V s 11 Junde finedunde finedun "5" Salutation "F First Name T Last Name SO-8859-1 (Western European and US) V CP1252 (MS Western European & US) V
User Interface Default Date Format: Default Language: Default Name Format: Dutbound Email Character Set Set this to the character set most commonly used in your ocale: Export Settings Import/Export Character Set (Email, .cay, vCard, PDF, data Import/Export Character Set (Email, .cay, vCard, PDF, data Export Cest) Delimiter:	2008-12-23 V 23:00 V US English V I 1 Undefinedundefinedun "e" Salufation "F First Name T Last Name ISO-8859-1 (Western European and US) V CP1252 (MS Western European & US) V
Jeer Interface Default Date Format: Default Language: Default Name Format: Dutbound Email Character Set Set this to the character Set or set or set on the character set most commonly used in your ocale: Export Settings mport(Export Character Set (Email, .csv, vCard, PDF, data mport(): Export (.csv) Delimiter: Durrency Settings	2006-12-23 V 23.00 V US Englah V a f1 cude finedunde finedun "5" Salutation "F First Name ISO-8859-1 (Western European and US) V CP1252 (MS Western European & US) V
User Interface Default Date Format: Default Language: Default Language: Default Name Format: Dutbound Email Character Set Set Inis to the character set most commonly used in your locale: Export Settings import/Export Character Set (Email, .csv, vCard, PDF, data import/C. Export (.csv) Delimiter: Currency Settings Default Currency:	2006-12-23 V 23.00 V US Englah V a f1 Unde finedunde finedun "s" Salutation "F First Name ISO-8859-1 (Western European and US) V CP1252 (MS Western European & US) V US Dolars V S USD
User Interface Default Date Format: Default Time Format: Default Time Format: Default Language: Default Name Format: Outbound Email Character Set Set this to the character set most commonly used in your locale: Export Settings importExport Character Set (Email, .csv, vCard, PDF, data import; Export Casv, Delimiter: Currency Settings Default Currency: Significant Digits:	2008-12-23 V US English V a f1 unde finedunde finedund "s" Salutation "F First Name SO-8859-1 (Western European and US) V CP1252 (MS Western European & US) V US Dotars V S USD 2 V



### PASO 6: Esta pantalla muestra un resumen de los datos configurados para su confirmación.

	BOGARCHM.
Please confirm the settings below. If you would like to change any Otherwise, click "Next" to start the installation.	of the values, click "Back" to edit.
Database Configuration	
Database Name	sugarcrm_os (will be created)
Database Username	root (will not be created)
Drop and Recreate Existing Sugar tables?	No
Populate Database with Demo Data?	No
Privileged Database User Name	root
Site Configuration	
URL of Sugar Instance	http://localhost/SugarSuite-Full- 4.5.0
Sugar Updates Config	
Automatically Check For Updates?	Yes
Advanced Site Security	
Use a Custom Session Directory for Sugar?	No
Use a Custom Log Directory?	No
Provide Your Own Application ID?	No
Locale Settings & Language Pack	
Default Date Format:	2006-12-23
Default Time Format:	23:00
Default Language:	US English
Default Name Format:	Dr. David Livingstone
Import/Export Character Set (Email, .csv, vCard, PDF, data import):	CP1252
Export (.csv) Delimiter:	
Default Currency:	US Dollars
Currency Symbol:	\$
Currency Code (ISO 4217):	USD
1000s Separator:	
Decimal Separator:	

**PASO 7**: En esta pantalla se mostrarán los pasos que lleva a cabo el instalador: la creación de la base de datos, de cada una de las tablas... (puede tardar unos cuantos minutos).

Step 7: Perform Setup	SUGARCRM.
Creating Sugar configuration file (config.php)	
Creating Sugar application tables, audit tables, and relationship metadata	
Creating the database sugarcrm_os on localhostdone relationships creating / relationship meta done acl_roles creating / relationship meta done leads creating / audit table / relationship meta done contacts creating / audit table / relationship meta done accounts creating / audit table / relationship meta done accounts creating / audit table / relationship meta done opportunities creating / audit table / relationship meta done cases creating / audit table / relationship meta done opportunities creating / relationship meta done cases creating / relationship meta done email_templates creating / relationship meta done emailman creating / relationship meta done calls creating / relationship meta done emails creating / relationship meta done emails creating / relationship meta done iframes creating / relationship meta done itrames creating / relationship meta done tasks creating / relationship meta done currencies creating / relationship meta done tasks creating / relationship meta done tracker creating / relationship meta done tracker creating / relationship meta done timport_maps creating / relationship meta done timport_maps creating / relationship meta done users_last_import creating / relationship meta done	



**PASO 8**: Pantalla de Login. Si se llega a esta pantalla la instalación se ha completado con éxito.

Bienvenido a SUGAR OPEN SOURCE.
Por favor, introduzca su nombre de usuario y contraseña.
Identificador Contraseña Login ♥ Opciones
Tiempo de respuesta del servidor: 4.337548 segundos. © 2004-2006 <u>SugarCRM Inc.</u> All Rights Reserved. POWERED BY <b>SUGARCRM.</b>