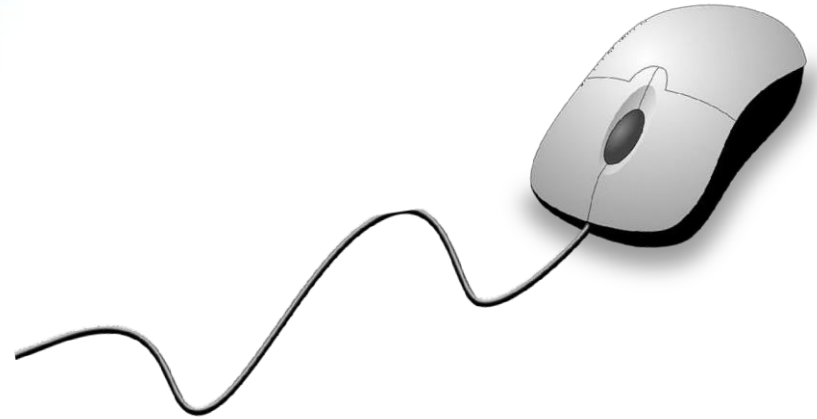


공개SW 솔루션 설치 & 활용 가이드

응용SW > CRM



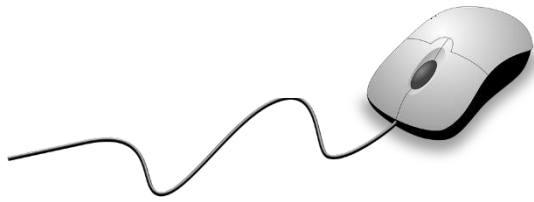
제대로 배워보자

How to Use Open Source Software

Open Source Software Installation & Application Guide



오픈소스 소프트웨어 통합지원센터
Open Source Software Support Center



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1. 개요



소개	<ul style="list-style-type: none"> 고객 중심 사업 관리를 가능하게 해주는 CRM(Customer Relationship Management) 소프트웨어 오픈 소스 CRM의 기본적인 모습이라고 할 수 있는 소프트웨어 		
주요기능	<ul style="list-style-type: none"> 사업에 필요한 다양한 데이터들을 고객 중심으로 관리할 수 있도록 해주는 기본 모듈 제공 다양한 사업 아이템들이 가지는 다양한 요구사항에 대응할 수 있는 유연한 인터페이스제공 손쉬운 기능 추가 및 수정을 가능하게 해주는 모듈 빌더와 스튜디오 제공 		
대분류	응용 SW	소분류	CRM
라이선스 형태	Affero General Public License version 3	사전설치 솔루션	OS, PHP, Database, Web Server
실행 플랫폼	<ul style="list-style-type: none"> Linux/Unix/Mac OS/ Windows Server 2003, 2008/Windows 7 PHP 5.2, 5.3 	커뮤니티 버전	6.5.26
		상용 버전	8.2 (2018년 10월 기준)
특징	<ul style="list-style-type: none"> 대부분의 소스 코드가 PHP를 이용하여 개발되어 배포됨(유상버전과 차이가 있음) 6.5 버전 이후 커뮤니티 버전을 지원하지 않음(기술지원은 없지만 커뮤니티가 있음) 		
보안취약점	<ul style="list-style-type: none"> 취약점 ID : CVE-2014-3244 심각도 : 9.8 CRITICAL(V3) 취약점 설명 : XML외부개체 삽입 취약점, 공격자는이 문제를 악용하여 영향을 받는 애플리케이션의 컨텍스트에서 중요한 정보를 얻거나 임의의 코드를 실행할 수 있음 대응방안 : 6.5.16 이상으로 업데이트 참고 경로 : https://seclists.org/fulldisclosure/2014/Jun/92 		
개발회사/커뮤니티	SUGARCRM / SGARCRM Community		
공식 홈페이지	https://www.sugarcrm.com		



2. 기능요약



- SUGARCRM Community Edition의 주요 기능

Dashlet

Sales

Accounts Co
ntacts Oppor
tunities Lead
s

Collaboration

Emails Proj
ects Docu
ments

Search

Marketing

Accounts
Contacts L
eads Cam
paigns Tar
gets Targe
tLists

Studio

Support

Accounts
Contacts
Cases B
ugs

Module builder

Activities

Calendar
Calls Me
etings E
mails Tas
ks Notes

각각의 모듈이 상호 관계에 따라 서로 연결되어 있기 때문에 고객에 대한 정보를 더욱 쉽게 찾고 활용



3. 실행환경



- 추천 스택

구분	Linux Stack	Windows Stack
PHP Version	5.3 (APC extension enabled)	5.3 (Wincache extension Installed)
PHP Accelerator	APC	Wincache
Platform	Red Hat Enterprise Linux 5	Windows Server 2008
Server	Apache 2.2	IIS 7.5
Database		
MySQL	5.1	5.1
SQL Server	N/A	2008
Oracle	11g	11g



4. 설치 및 실행

 SUGARCRM



세부 목차

1. 설치 파일 준비
2. 설치 환경 준비
3. 설치 환경 구성
4. SugarCRM 설치
5. SugarCRM 설치 완료



4. 설치 및 실행



4.1 설치 파일 준비

- SugarCRM 커뮤니티 버전 설치 파일 준비
 - <https://sourceforge.net/projects/sugarcrm/>
- 설치용 파일인 SugarCE-6.5.26.zip 파일 다운
 - 6.5 버전 관련 문서 URL
 - * http://support.sugarcrm.com/Documentation/Unsupported_Versions/Sugar_6.5/index.html
- <https://www.sugarcrm.com/> 에서 최신 버전의 FREE TRIAL 버전을 다운 받아서 사용해 볼 수도 있음
- 상용 최신 버전의 경우 더 좋은 하드웨어와 소프트웨어 환경 필요
 - 상용 최신 버전 관련 문서 URL
 - * http://support.sugarcrm.com/Documentation/Sugar_Versions/8.0/Pro/Installation_and_Upgrade_Guide/

4. 설치 및 실행



4.2 설치 환경 준비

- SugarCRM을 설치할 서버 준비
- SugarCRM을 설치하기 위해 필요한 웹서버, PHP를 쉽고 빠르게 설치하기 위해 CentOS 6.5 버전을 설치하여 OS에 포함된 패키지 사용
- 동시 접속자 수와 데이터 양에 따라 시스템 권장 사양이 달라지지만, 설치 테스트용도라면 OS, 웹서버를 설치 할 수 있는 스펙이면 됨



4. 설치 및 실행



4.3 설치 환경 구성(1/2)

- Centos 6.5 에 포함된 Apache 2.2와 PHP 5.3 설치
- 웹서버 설치 (Apache 2.2)
 - 아래 명령어로 설치

```
[root@localhost ~]# yum install httpd
```

```
[root@localhost ~]# service httpd start
[root@localhost ~]# httpd -v
Server version: Apache/2.2.15 (Unix)
Server built:   Jun 19 2018 15:45:13
```

- PHP 설치 (PHP 5.3.3)
 - 아래 명령어로 PHP 관련 패키지 설치

```
[root@localhost ~]# yum install php*
```

- 설치 후 버전 확인

```
[root@localhost ~]# php -v
No log handling enabled - turning on stderr logging
Created directory: /var/lib/net-snmp/mib_indexes
PHP 5.3.3 (cli) (built: Mar 22 2017 12:27:09)
Copyright (c) 1997-2010 The PHP Group
Zend Engine v2.3.0, Copyright (c) 1998-2010 Zend Technologies
```



4. 설치 및 실행



4.3 설치 환경 구성(2/2)

- 데이터베이스 설치 (MySQL 5.1)
 - 아래 명령어로 설치

```
[root@localhost ~]# yum install mysql*
```

```
[root@localhost ~]# service mysqld start
```

(초기 패스워드는 엔터 후 넘김)

```
[root@localhost ~]# mysql -u root -p
```



4. 설치 및 실행



4.4 SugarCRM 설치(1/16)

- SugarCRM 압축파일의 압축 해제
 - /var/www/html/ 아래에 압축 해제

```
[root@localhost html]# ll
total 21716
-rw-r--r--. 1 root root 22234728 Nov 15 14:49 SugarCE-6.5.26.zip
[root@localhost html]# pwd
/var/www/html
[root@localhost html]# unzip SugarCE-6.5.26.zip
```

- 압축 해제한 디렉토리의 소유자 및 권한 변경

```
[root@localhost html]# ll
total 21720
-rw-r--r--. 1 root root 22234728 Nov 15 14:49 SugarCE-6.5.26.zip
drwxr-xr-x. 19 root root 4096 May 26 2017 SugarCE-Full-6.5.26
[root@localhost html]# chown -R apache:apache SugarCE-Full-6.5.26/
[root@localhost html]# cd SugarCE-Full-6.5.26/
[root@localhost SugarCE-Full-6.5.26]# chmod -R 755 cache/ custom/ modules/ data/
[root@localhost SugarCE-Full-6.5.26]# cd ..
[root@localhost html]# ll
total 21720
-rw-r--r--. 1 root root 22234728 Nov 15 14:49 SugarCE-6.5.26.zip
drwxr-xr-x. 19 apache apache 4096 May 26 2017 SugarCE-Full-6.5.26
```



4. 설치 및 실행



4.4 SugarCRM 설치(2/16)

- 웹서버에서 PHP 파일을 읽을 수 있도록 웹서버 설정 변경

```
[root@localhost html]# vi /etc/httpd/conf/httpd.conf
```

```
AddType application/x-httpd-php .php .html .htm  
AddType application/x-httpd-php-source .phps
```

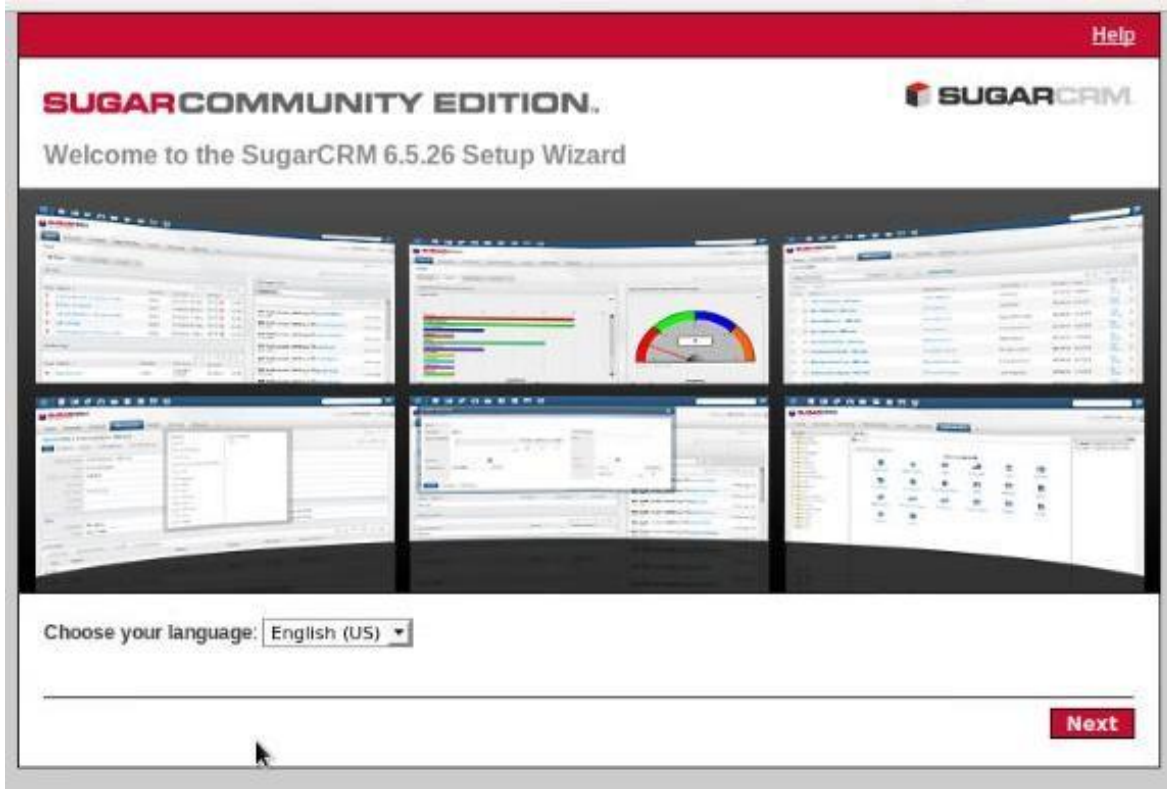


4. 설치 및 실행



4.4 SugarCRM 설치(3/16)

- 웹 브라우저를 통해 GUI 환경에서 SugarCRM 설치
 - `http://<서버URL>/SugarCE-Full-6.5.26/install.php` 입력



- SugarCRM Community 버전은 기본적으로 영어만 사용가능 하므로 Next 버튼 클릭




4. 설치 및 실행



4.4 SugarCRM 설치(4/16)

- 설치 준비사항 확인

[Help](#)

SUGARCOMMUNITY EDITION. 

Are you ready to install?

Please read the following important information before proceeding with the installation. The information will help you determine whether or not you are ready to install the application at this time.

⤴ **Required System Components**

Before you begin, please be sure that you have the supported versions of the following system components:

- Database/Database Management System (Examples: MySQL, SQL Server, Oracle, DB2)
- Web Server (Apache, IIS)

Consult the Compatibility Matrix in the Release Notes for compatible system components for the Sugar version that you are installing.

⤴ **Initial System Check**

When you begin the installation process, a system check will be performed on the web server on which the Sugar files are located in order to make sure the system is configured properly and has all of the necessary components to successfully complete the installation.

The system checks all of the following:

- **PHP version** – must be compatible with the application
- **Session Variables** – must be working properly
- **MB Strings** – must be installed and enabled in php.ini
- **Database Support** – must exist for MySQL, SQL Server, Oracle, or DB2
- **Config.php** – must exist and must have the appropriate permissions to make it writeable
- The following Sugar files must be writeable:
 - /custom



4. 설치 및 실행



4.4 SugarCRM 설치(5/16)

- 설치 준비사항 확인

Sugar database is defined.

- If you do not already have a database, the name you provide will be used for the new database that is created for the instance during installation.
- **Database administrator user name and password**
 - The database administrator should be able to create tables and users and write to the database.
 - You might need to contact your database administrator for this information if the database is not located on your local computer and/or if you are not the database administrator.
- **Sugar database user name and password**
 - The user may be the database administrator, or you may provide the name of another existing database user.
 - If you would like to create a new database user for this purpose, you will be able to provide a new username and password during the installation process, and the user will be created during installation.

For the **Custom** setup, you might also need to know the following:

- **URL that will be used to access the Sugar instance** after it is installed. This URL should include the web server or machine name or IP address.
- [Optional] **Path to the session directory** if you wish to use a custom session directory for Sugar information in order to prevent session data from being vulnerable on shared servers.
- [Optional] **Path to a custom log directory** if you wish to override the default directory for the Sugar log.
- [Optional] **Application ID** if you wish to override the auto-generated ID that ensures that sessions of one Sugar instance are not used by other instances.
- **Character Set** most commonly used in your locale.

For more detailed information, please consult the Installation Guide.

Back Next

- PHP, Apache, Database 등 버전과 SugarCRM 디렉토리의 권한은 앞에서 변경하였으므로 Next 버튼 클릭



4. 설치 및 실행



4.4 SugarCRM 설치(6/16)

- 라이선스 조항 확인

Help

SUGARCOMMUNITY EDITION. SUGARCRM

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.

I Accept

Printable View

Back Next

- SugarCRM Community 버전의 라이선스 조항을 Accept 후 Next 버튼 클릭



4. 설치 및 실행



4.4 SugarCRM 설치(7/16)

- 설치 옵션 선택



- 기본 설치 선택 후 Next 버튼 클릭



4. 설치 및 실행



4.4 SugarCRM 설치(8/16)

- Database 선택

The screenshot shows a web-based installation wizard for SugarCRM Community Edition. The page title is 'SUGAR COMMUNITY EDITION.' and the SugarCRM logo is in the top right. The main heading is 'Database Type'. Below it, the instruction reads 'Specify Database Type' and 'What type of database will be used for the Sugar instance you are about to install?'. There is a single radio button option labeled 'MySQL (mysqli extension)' which is selected. At the bottom right, there are two buttons: 'Back' and 'Next'.

- 설치된 Database를 자동 선택해주기 때문에 확인 후 Next 버튼 클릭




4. 설치 및 실행



4.4 SugarCRM 설치(9/16)

- Database 생성 및 연결

SUGAR COMMUNITY EDITION. 

Database Configuration

*** Required field**

Provide Database Name

Name of the database that will contain the data for the Sugar instance you are about to install:

*** Database Name**

Name of web server or machine (host) on which the database is located (such as localhost or www.mydomain.com):

*** Host Name**

Provide Database User Information

The username and password of a database administrator who can create database tables and users and who can write to the database is necessary in order to set up the Sugar database.

*** Database Administrator Username**

Database Admin Password

For security purposes, you can specify an exclusive database user to connect to the Sugar database. This user must be able to write, update and retrieve data on the Sugar database that will be created for this instance. This user can be the database administrator specified above, or you can provide new or existing database user information.

Sugar Database Username

Choose Demo Data

Populate Database with Demo Data?

- * 표시된 항목 입력 후 Next 버튼 클릭



4. 설치 및 실행



4.4 SugarCRM 설치(10/16)

- SugarCRM 어플리케이션용 관리자 계정 생성

The screenshot shows the 'Site Configuration' page for SugarCRM Community Edition. The page title is 'Identify Administration User'. Below the title, there is a paragraph of instructions: '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.' There are three input fields: 'Sugar Application Admin Name' with the value 'admin', 'Sugar Admin User Password' with a masked password, and 'Re-enter Sugar Admin User Password' with a masked password. At the bottom right, there are 'Back' and 'Next' buttons.

- 패스워드 입력 후 Next 버튼 클릭



4. 설치 및 실행



4.4 SugarCRM 설치(11/16)

- 설정 내역 확인

Help

SUGARCOMMUNITY EDITION. SUGARCRM

Confirm Settings

Database Configuration

Database Type	mysql
Host Name	localhost
Database Name	sugarcrm (will be created)
Database Administrator Username	root
Populate Database with Demo Data?	no
Drop Tables	No

System Credentials

Sugar Database Username	root
Sugar Database User Password	(hidden)
Sugar Application Admin Name	Admin
Sugar Admin User Password	(hidden)

System Environment

PHP Version	5.3.3
XML Parsing	OK
MB Strings Module	OK



4. 설치 및 실행



4.4 SugarCRM 설치(12/16)

- 설정 내역 확인

Sprite Support	OK
PHP allows to use stream (upload://)	OK
Location of your PHP configuration file (php.ini):	/etc/php.ini

To Setup Crontab Note: In order to run Sugar Schedulers, add the following line to the crontab file:
* * * * * cd /var/www/html/SugarCE-Full-6.5.26; php -f cron.php > /dev/null 2>&1

[Print Summary](#)

[Show Passwords](#) [Back](#) [Install](#)

- 설정 내역을 확인하고 Install 버튼 클릭

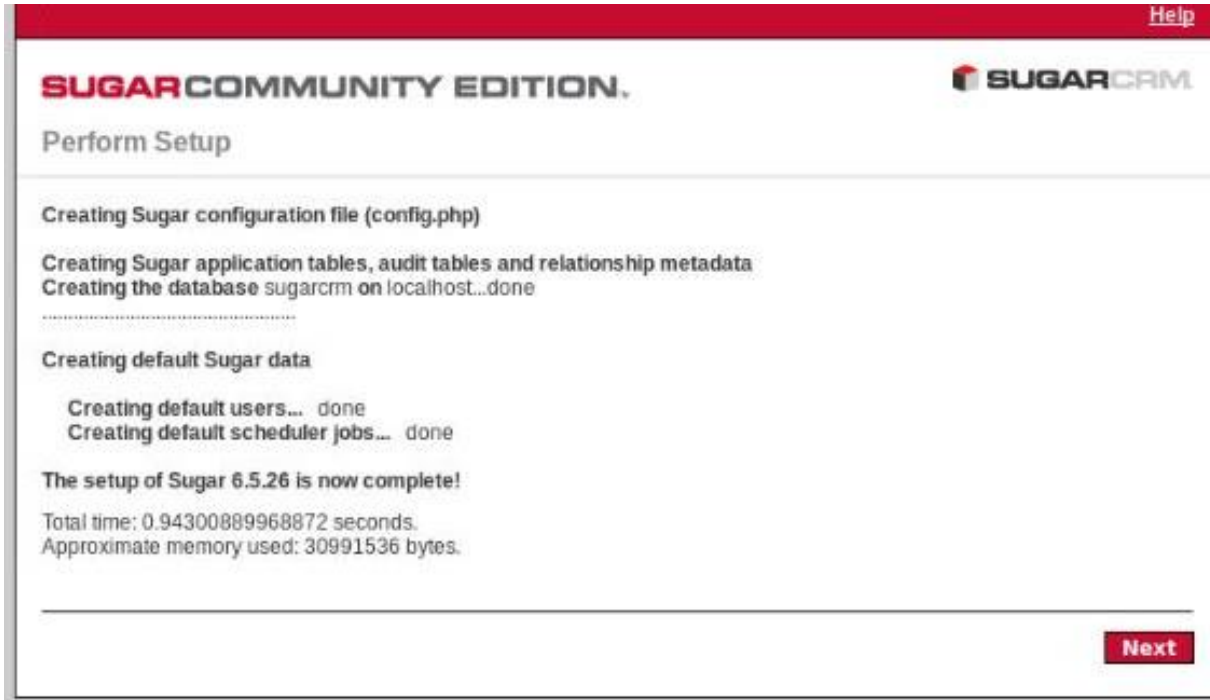


4. 설치 및 실행



4.4 SugarCRM 설치(13/16)

- 설치 완료



- 설치 완료 후 Next 버튼 클릭



4. 설치 및 실행



4.4 SugarCRM 설치(14/16)

- SugarCRM 접속

Welcome to
SUGAR COMMUNITY EDITION.

Warning: Your browser version is no longer supported or you are using an unsupported browser.
The following browser versions are recommended:

- Internet Explorer 10 (compatibility view not supported)
- Firefox 39.0
- Safari 6.0
- Chrome 43

User Name:

Password:

[Forgot Password?](#)

- 설치 후 <http://<서버URL>/SugarCE-Full-6.5.26>으로 접속하여 앞에서 입력했던 SugarCRM 어플리케이션용 관리자 패스워드를 입력하여 접속



4. 설치 및 실행



4.4 SugarCRM 설치(15/16)

- 사용자 정보 초기 입력

Your Information

*Provide information about yourself. The information you provide about yourself will be visible to other Sugar users. Fields marked with * are required.*

First Name:	<input type="text"/>	Last Name: *	<input type="text" value="Administrator"/>
Email Address: *	<input type="text" value="admin@mail.com"/>	IM Type:	<input type="text" value="-none-"/>
Office Phone:	<input type="text"/>	IM Name:	<input type="text"/>
Mobile:	<input type="text"/>		
Primary Address:	<input type="text"/>		
City:	<input type="text"/>	State:	<input type="text"/>
Postal Code:	<input type="text"/>	Country:	<input type="text"/>

< Back Next >

- SugarCRM 접속 후 사용자 정보를 입력 후 Next 버튼 클릭



4. 설치 및 실행



4.4 SugarCRM 설치(16/16)

- 사용자 정보 초기 입력

Your Locale

Specify your time zone and how you would like dates, currencies and names to appear in Sugar.

Time Zone:

Date Format: Time Format:

Currency:

Currency Significant Digits: Example:

Decimal Symbol:

1000s separator:

Name Display Format:

< Back Next >

- SugarCRM 접속 후 사용자 정보를 입력 후 Next 버튼 -> Finish 버튼 클릭



5. 기능소개



세부 목차

1. 사용자 환경
2. 관리자 환경
3. 개발 지원 기능

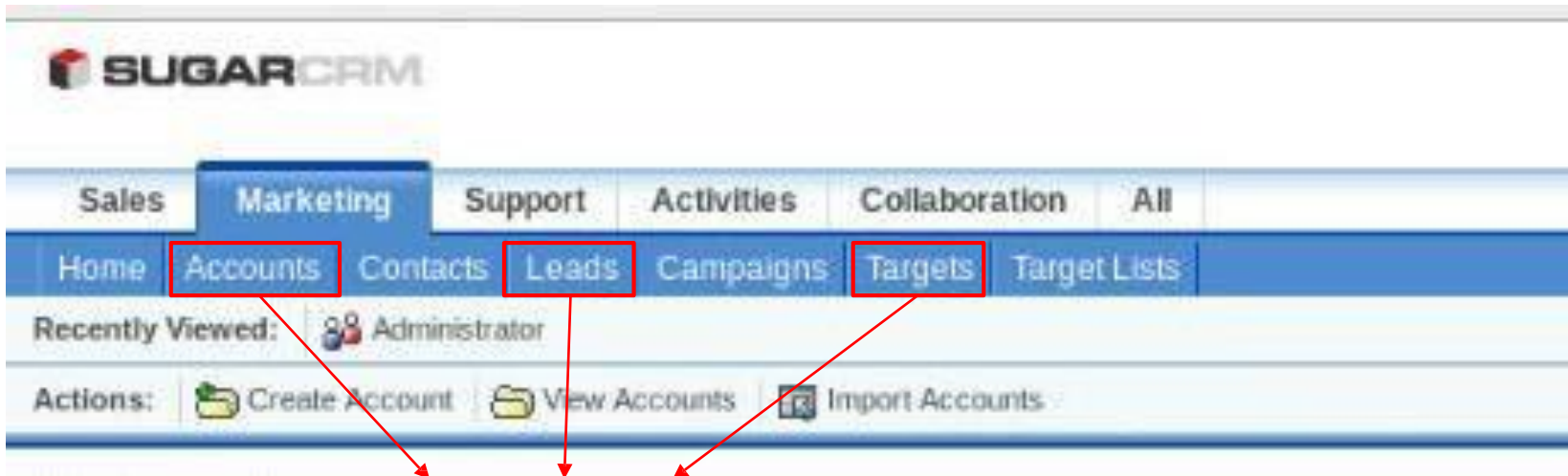


5. 기능 소개



5.1 사용자 환경

- 용어 소개
 - 모듈 : SugarCRM 내에서 모듈이란 하나의 업무단위를 말함
하나의 모듈은 하나의 데이터베이스 테이블 가짐
 - Relationship : 모듈간의 관계를 뜻하는 것으로 기본적으로 맺어져 있는 관계가 있고
사용자가 추가, 삭제 가능
관계는 레코드단위로 맺을 수 있음
 - 레코드 : 모듈(테이블) 내에 생성되는 하나의 기록



각각 하나의 모듈



5. 기능 소개



5.1 사용자 환경

- 직관적인 UI
 - 직관적인 UI를 통해 고객 및 영업기회 관리를 쉽게 할 수 있고, Relation으로 인해 업무의 흐름을 쉽게 파악 가능

Sales Marketing Support Activities Collaboration All

Home Accounts Contacts Opportunities Leads

Recently Viewed: Tes Account Administrator

Actions: Create Account View Accounts Import Accounts

Tes Account

Edit

Overview

Name:	Tes Account	Office Phone:	123-456-7890
Website:	http://sugarcrm.com	Fax:	
Billing Address:		Shipping Address:	
Email Address:	-none-		
Description:			

More Information

Type:		Industry:	
Annual Revenue:		Employees:	
SIC Code:		Ticker Symbol:	
Member of:		Ownership:	
Campaign:		Rating:	

Other

Assigned to:	Administrator	Date Modified:	11/15/2018 04:25pm
Date Created:	11/15/2018 04:25pm by Administrator		

Contacts

Create

Name	City	State	Email
contact1 contact1			contact1@mail.com
contact2 contact2			contact2@mail.com



5. 기능 소개



5.2 관리자 환경

- 사용자, 역할, 권한, 시스템 설정, 시스템 진단, 수리, 백업 등 CRM 관리와 설정에 필요한 기능들을 다양하게 제공
- 각 항목을 클릭하면 해당 목록이나 세부적인 관리 화면이 나타남

Users
Create, edit, activate and deactivate users in Sugar.

User Management	Manage user accounts and passwords	Role Management	Manage role membership and properties
Password Management	Manage password requirements and expiration		

Sugar Connect
Connect to the various SugarCRM services where you can access the SugarCRM forums and Sugar Wiki, search FAQs (Frequently Asked Questions), download the latest Sugar version, file and research reported bugs and request new features and more.

Sugar Support Portal	Access technical support and more	Sugar Updates	Check for the latest Sugar version
Online Documentation	View Sugar documentation for administrators and end-users		

System
Configure the system-wide settings according to the specifications of your organization. Users can override some of the default locale settings within their user settings page.

System Settings	Configure system-wide settings	Import Wizard	Use the import wizard to easily import records into the system
Locale	Set default localization settings for your system	Upgrade Wizard	Upload and install Sugar upgrades
Currencies	Set up currencies and conversion rates	Backups	Backup Sugar files
Languages	Manage which languages are available for users	Repair	Check and repair Sugar
Global Search	Configure the global search options for the system.	Diagnostic Tool	Capture system configuration for diagnostics and analysis
Connectors	Manage connector settings	Themes	Choose themes for users to be able to select
Scheduler	Set up scheduled events	Activity Streams	Enable the user feed and module feeds for the My Activity Stream dashlet.
OAuth Keys	OAuth key management		

Email
Manage outbound and inbound emails. The email settings must be configured in order to enable users to send out email and newsletter campaigns.

Email Settings	Configure email settings	Inbound Email	Set up group mail accounts for monitoring inbound email and manage personal inbound mail account information for users
Campaign Email Settings	Configure email settings for campaigns	Email Queue	Manage the outbound email queue

Developer Tools
Create and edit modules and module layouts, manage standard and custom fields and configure tabs.

Studio	Customize module fields, layouts and relationships	Rename Modules	Change the names of the modules appearing within the application
Module Builder	Build new modules to expand the functionality of Sugar	History Subpanel	Enable/Disable contacts' emails in history
Display Modules and Subpanels	Choose which modules are displayed in the navigation bar and which subpanels are displayed system-wide	Module Loader	Add or remove Sugar modules, themes, language packs and other extensions
Configure Module Menu Filters	Create and edit module menu filters	Dropdown Editor	Add, delete, or change the dropdown lists



5. 기능 소개



5.3 개발 지원 기능

- Studio 메뉴를 이용해 필드를 추가하거나 필드의 배치 등 수정 가능

Developer Tools
Create and edit modules and module layouts, manage standard and custom fields and configure tabs.

Studio	Customize module fields, layouts and relationships	Rename Modules
Module Builder	Build new modules to expand the functionality of Sugar	History Subpanel

Sales Marketing Support Activities Collaboration All
Home Accounts Contacts Opportunities Leads Administration
Recently Viewed: Tes Account Administrator

Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).

Modules

- Accounts
 - Labels
 - Fields
 - Relationships
- Layouts
 - EditView
 - DetailView
 - ListView
 - QuickCreate
- Sugar Dashlet
- PopupView
- Search
- Subpanels
- Bugs
- Calls

Studio

Export Customizations

- Accounts
- Bugs
- Documents
- Employees
- Project Tasks
- Projects



6. 활용예제



세부 목차

1. 레코드 생성 및 조회
2. Accounts 모듈에 입력란 추가
3. Relationship 추가



6. 활용 예제



6.1 레코드 생성 및 조회(1/2)

- 레코드 생성

The screenshot shows the SUGARCRM user interface. At the top right, it says 'Welcome, Administrator' with a 'Logout' link and a 'Sitemap' link. Below this is a navigation menu with tabs for 'Sales', 'Marketing', 'Support', 'Activities', 'Collaboration', and 'All'. Under 'Marketing', there are sub-tabs for 'Home', 'Accounts', 'Contacts', 'Leads', 'Campaigns', 'Targets', and 'Target Lists'. Below the navigation is a 'Recently Viewed' section showing 'Administrator'. The 'Actions' section has three buttons: 'Create Account' (highlighted with a red box), 'View Accounts', and 'Import Accounts'. Below the actions is a note: 'Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).' Below the note is a 'Create' section with 'Save' and 'Cancel' buttons. The main form is titled 'Overview' and contains the following fields:

Name: *	<input type="text" value="Tes Account"/>	Office Phone:	<input type="text" value="123-456-7890"/>
Website:	<input type="text" value="http://sugrcrm.com"/>	Fax:	<input type="text"/>
Billing Address		Shipping Address	
Billing Street:	<input type="text"/>	Shipping Street:	<input type="text"/>
Billing City:	<input type="text"/>	Shipping City:	<input type="text"/>
Billing State:	<input type="text"/>	Shipping State:	<input type="text"/>
Billing Postal Code:	<input type="text"/>	Shipping Postal Code:	<input type="text"/>
Billing Country:	<input type="text"/>	Shipping Country:	<input type="text"/>
		Copy address from left:	<input type="checkbox"/>

- Create 버튼을 클릭하여 입력화면에서 정보 입력 후 Save 버튼을 클릭하면 하나의 레코드 생성



6. 활용 예제



6.1 레코드 생성 및 조회(2/2)

- 레코드 조회

The screenshot shows the SUGARCRM user interface. At the top right, there is a navigation bar with links for 'Welcome, Administrator', 'Log Out', 'Employees', 'Admin', 'Support', and 'About'. Below this is a search bar and a 'Search' button. The main navigation menu includes 'Sales', 'Marketing', 'Support', 'Activities', 'Collaboration', and 'All'. Under 'Sales', there are sub-menus for 'Home', 'Accounts', 'Contacts', 'Opportunities', and 'Leads'. The 'Recently Viewed' section shows 'Tes Account' and 'Administrator'. The 'Actions' section includes 'Create Account', 'View Accounts' (highlighted with a red box), and 'Import Accounts'. A note below the actions states: 'Note: To send record assignment notifications, an SMTP server must be configured in Email Settings.' Below the note is a 'Search Accounts' section with a search bar, 'My Items' checkbox, 'Search', 'Clear', and 'Advanced Search' buttons. A table below the search section displays account information. The table has columns for 'Name', 'City', 'Billing Country', 'Phone', 'User', 'Email Address', and 'Date Created'. The first row shows 'Tes Account' (highlighted with a red box), with a phone number of '123-456-7890' and a user of 'Administrator'. The date created is '11/15/2018 04:25pm'. The table also includes 'Delete' buttons and pagination information '(1 - 1 of 1)'.

- View 버튼을 클릭하여 생성된 레코드의 목록을 확인 및 조회 가능
- 레코드 목록 화면에서 Name을 클릭하여 해당 레코드의 상세 정보 확인 가능



6. 활용예제



6.2 Accounts 모듈에 입력란 추가(1/7)

- Accounts(거래처) 모듈에 추가로 필요한 항목이 있을 경우 아래와 같이 추가 가능
 - ex) Owner 항목 추가

1. 관리자 페이지에서 Studio 메뉴 클릭

Developer Tools			
Create and edit modules and module layouts, manage standard and custom fields and configure tabs.			
Studio	Customize module fields, layouts and relationships	Rename Modules	Change the na application
Module Builder	Build new modules to expand the functionality of Sugar	History Subpanel	Enable/Disabl
Display Modules and Subpanels	Choose which modules are displayed in the navigation bar and which subpanels are displayed system-wide	Module Loader	Add or remove other extensio
Configure Module Menu Filters	Create and edit module menu filters	Dropdown Editor	Add, delete, or

2. Accounts -> Fields -> Add Field 를 순서대로 클릭

Name	Display Label	Type
name	Name	Name
date_entered	Date Created	Datetime
date_modified	Date Modified	Datetime
description	Description	TextArea
deleted	Deleted	Checkbox
account_type	Type	DropDown
industry	Industry	DropDown
annual_revenue	Annual Revenue	TextField
phone_fax	Fax	Phone
billing address street	Billing Street	TextField



6. 활용예제



6.2 Accounts 모듈에 입력란 추가(2/7)

3. Data Type 선택

- 예제에서는 TextField 진행

Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).

Modules

- Accounts
 - Labels
 - Fields
 - Relationships
 - Layouts
 - Subpanels
- Bugs
- Calls
- Campaigns
- Cases
- Contacts
- Documents
- Employees
- Leads
- Meetings
- Notes

Edit Fields Edit Field X

Save Cancel

Data Type: TextField

Field Name: Address

Display Label: Checkbox

System Label: Currency

Help Text: Date

Comment Text: Datetime

Default Value: Decimal

Max Size: DropDown

Required Field: Float

Audit: HTML

Importable: IFrame

Duplicate Merge: Integer

MultiSelect

Phone

Radio

Relate

TextArea

URL

TextField



6. 활용예제



6.2 Accounts 모듈에 입력란 추가(3/7)

4. Field Name과 Display Label 입력 후 Save 버튼 클릭

Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).

Modules

- Accounts
 - Labels
 - Fields
 - Relationships
 - Layouts
 - Subpanels
- Bugs
- Calls
- Campaigns
- Cases
- Contacts
- Documents
- Employees
- Leads
- Meetings

Edit Fields Edit Field X

Save Cancel

Data Type: TextField ⓘ

Field Name: owner_field

Display Label: Owner field

System Label: LBL_OWNER_FIELD

Help Text:

Comment Text:

Default Value:

Max Size: 255

Required Field:

Audit:

Importable: Yes ⓘ

Duplicate Merge: Disabled ⓘ



6. 활용예제



6.2 Accounts 모듈에 입력란 추가(4/7)

- 생성된 Owner 필드를 Accounts 모듈에 배치
 1. Accounts -> Layouts -> EditView 순으로 클릭

Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).

Modules

- Accounts
- Labels
- Fields
- Relationships
- Layouts
- EditView
- DetailView
- ListView
- QuickCreate
- Sugar Dashlet
- PopupView
- Search
- Subpanels
- Bugs
- Calls
- Campaigns

Studio > Accounts > Layouts > EditView

Save Save & Deploy View History Restore Default Sync to DetailView

Toolbox

- New Panel
- New Row
- (filler)
- Alternate Phone
- Billing City
- Billing Country
- Billing Postal Code
- Billing State

Layout

Overview Display Type: Panel Collapse?

- Name Office Phone
- Website Fax
- Billing Street Shipping Street
- Email Address
- Description

More Information Display Type: Panel Collapse?

6. 활용예제



6.2 Accounts 모듈에 입력란 추가(5/7)

2. New Row 버튼을 드래그하여 오른쪽 빈 공간에 놓음

Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).

Modules

- Accounts
- Labels
- Fields
- Relationships
- Layouts
 - EditView
 - DetailView
 - ListView
 - QuickCreate
- Sugar Dashlet
- PopupView
- Search
- Subpanets
- Bugs
- Calls

EditView

New Panel

New Row

(filer)

Alternate Phone

Billing City

Billing Country

Billing Postal Code

Billing State

Created By

Date Created

Date Modified

Website

Fax

Billing Street

Shipping Street

Email Address

Description

(filer)

(filer)

More Information

Display Type: Panel

Collapse?

Type

Industry

Annual Revenue

Employees

SIC Code

Ticker Symbol

6. 활용예제



6.2 Accounts 모듈에 입력란 추가(6/7)

3. Owner Field를 드래그하여 (filter) 공간에 놓은 후 Save & Deploy 버튼 클릭

Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).

Modules

- Accounts
 - Labels
 - Fields
 - Relationships
 - Layouts
 - EditView**
 - DetailView
 - ListView
 - QuickCreate
 - Sugar Dashlet
 - PopupView
 - Search
 - Subpanels
- Bugs
- Calls

EditView

(filter)

Alternate Phone

Billing City

Billing Country

Billing Postal Code

Billing State

Created By

Date Created

Date Modified

Modified By Name

Shipping City

Shipping Country

Shipping Postal Code

Shipping State

Owner field (filter)

More Information Display Type: Panel Collapse?

Type Industry

Annual Revenue Employees

SIC Code Ticker Symbol

Member of Ownership

Campaign Rating

Other Display Type: Panel Collapse?



6. 활용예제



6.2 Accounts 모듈에 입력란 추가(7/7)

4. Accounts Create 화면에 Owner Field가 추가되었는지 확인

Billing City:

Billing State:

Billing Postal Code:

Billing Country:

Shipping City:

Shipping State:

Shipping Postal Code:

Shipping Country:

Copy address from left:

Email Address: + Primary Opted Out Invalid

Description:

Owner field: *

More Information



6. 활용예제



6.3 Relationship 추가

- Admin 화면 > Studio > 모듈명 > Relationships > Add Relationship 버튼 클릭
- Relationship을 설정하고 Save & Deploy 클릭
- 새로 생성된 관계로 인해 모듈의 서브 패널이 추가된 것 확인
- 관계가 설정되면 웹 문서 처럼 파란색 링크를 따라 내용 서로 확인

Name	Primary Module	Type	Related Module
tasks_assigned_user	Users	One to Many	Tasks
lead_tasks	Leads	One to Many	Tasks
project_tasks_tasks	Project Tasks	One to Many	Tasks
tasks_notes	Tasks	One to Many	Notes
account_tasks	Accounts	One to Many	Tasks
opportunity_tasks	Opportunities	One to Many	Tasks
contact_tasks	연락처 목록	One to Many	Tasks
prospect_tasks	Targets	One to Many	Tasks
contact_tasks_parent	연락처 목록	One to Many	Tasks
projects_tasks	Projects	One to Many	Tasks
tasks_modified_user	Users	One to Many	Tasks
tasks_documents_1*	Tasks	One to Many	Documents
case_tasks	Cases	One to Many	Tasks
tasks_created_by	Users	One to Many	Tasks
bug_tasks	Bugs	One to Many	Tasks

Tasks Relationships | Edit Relationship

Save & Deploy | Cancel

Language: English (US)

Primary Module: Module: Tasks | Type: One to Many | Related Module: Module: Documents | Label: Documents | Subpanel from Documents: default

Actions: Create Task | View Task

장보기

Edit

Overview

Subject: 장보기

Start Date:

Due Date:

Priority: High

Description: 1. 아채만두
2. 김치만두
3. 콩나물
4. 두부

Other

Assigned to: Administrator

Date Created: 10/18/2018 04:05pm by Administrator

Notes

Create Note or Attachment

Subject: 연

No Data

Documents

Create

동물병원 명단.xlsx

Actions: Create Document | View Documents

Note: To send record assignment notifications, an SMTP server must be configured in [Email 5](#)
Warning: Please upgrade Chart Data Cache using the upgrade in the [administration panel](#)
Warning: Please upgrade htaccess using the upgrade in the [administration panel](#)

동물병원 명단.xlsx

Edit

Overview

File Name: 동물병원 명단.xlsx | Status: Active

Document Name: 동물병원 명단.xlsx | Revision: 1

Document Type: | Template?:

Publish Date: 10/18/2018 | Category:

Expiration Date: | Sub Category:

Description:

Related Document: | Related Document Revision:

Assigned to: | Tasks: 장보기

Revision Details

Revision Created By: Administrator | Last Revision Create Date: 10/18/2018

Document Revisions

Create (1 - 1 of)

File	Revision	Date Created	Created by	Change Log
동물병원 명단.xlsx	1	10/18/2018 04:19pm	Administrator	Document Created



Q CRM을 왜 사용해야 하나요?

A SNS, 실시간, 개인 방송 등에 의한 소비자 중심의 새로운 시장이 형성되고 있다. 고객과 좋은 관계를 유지하는 것은 시장의 생존을 좌우하는 일이 되었다. CRM(Customer Relationship Management)은 고객관계관리를 중심으로 한다. CRM은 고객 중심으로 모든 관련 데이터가 연결되게 하여 고객에 대한 정확한 이해와 적절한 마케팅 기법을 실행 할 수 있도록 도와준다. 고객이 원하는 제품과 서비스를 제공하기 위한 분석 자료데이터를 축적하려면 고객과 좋은 관계를 유지하여 지속적으로 데이터를 축적해야 한다. 데이터를 바탕으로 고객의 요구를 정확히 파악하고 충족시켜 고객의 구매를 유도하여 수익 향상을 가져올 수 있다. 또한 우호적인 고객을 중심으로 고객 수를 증가시켜 장기적인 수익 향상을 기대할 수 있다.





Q SugarCRM의 다른 커뮤니티 버전도 있나요?

A 오픈소스 커뮤니티 에디션으로서 나온 다른 프로젝트들이 있다.

Vtiger CRM, 2004 fork of V1.0 of SugarCRM

SarvCRM, 2012 fork SugarCRM Community Edition 5.5.4

SuiteCRM, 2013 fork of SugarCRM Community Edition 6.5

Q 다른 오픈소스 CRM에는 어떤 것이 있나요?

A EpesiCRM, Odoo, SplendidCRM 등 다양한 CRM이 나와 있다.

Q SugarCRM은 한글 버전이 없나요?

A SugarCRM Community Edition 은 기본적으로 한국어가 지원되지 않습니다.



8. 용어정리



용어	설명
CentOS	The Community ENTerprise Operating System
PHP	PHP(Hyper text Preprocessor)는 프로그래밍 언어의 일종
AGPL	Affero General Public License의 약자 전체 소스 코드가 웹 응용 프로그램의 네트워크 사용자에게 제공되어야 함
MySQL	세계에서 가장 많이 쓰이는 오픈 소스의 관계형 데이터베이스 관리 시스템 (RDBMS)
Httpd	Apache 재단에서 만든 웹 서버로써 원래 이름이 apache httpd이기 때문에 단독으로 apache, httpd라고 부르기도 함, 본문에서는 httpd라고 함
GUI	Graphical User Interface
CRM	Customer Relationship Management 고객 중심의 사업 관리를 위한 SW



Open Source Software Installation & Application Guide



이 저작물은 크리에이티브 커먼즈 [저작자표시-비영리-동일조건 변경허락 2.0 대한민국 라이선스]에 따라 이용하실 수 있습니다.