



Quick and Simple Installation

1. Visit the plug in page in the site manager area and fill in your sugarcrm installation details.
2. Verify the connection and download the plug in.
3. Decompress the archive (sugar.zip) and note the folder structure:

```
/opportunities/  
/opportunities/language/  
/opportunities/language/en_us.lang.php  
/opportunities/metadata/  
/opportunities/metadata/detailfieldview.php
```

4. Copy all of these files into the /custom/ directory at the top level of your sugar installation. So you should have something like:

```
SUGAR Root/Custom/Modules/Opportunities
```

5. Login to sugar, and check your opportunities, each individual opportunity page will now have an extra button 'Export to eDirectory'. You're done.

How to use this plug in

1. After you have created your opportunities, you will want to import closed deals into eDirectory for payment information.
2. Open the individual opportunity page and hit the 'Export to eDirectory' button on the button bar.
3. A pop up interface with import information will appear, choose the listing level and language to use for the new member.
4. Click the import button to be taken to the customer data entry form.
5. Finish filling in the form with the information not contained within Sugar.
6. Enter payment details and you're good to go, the new site sponsor is set up.
7. The new sponsor will receive an email from your directory with an explanation on how to access their listing and your directory.

Plug in Requirements

This plugin (Sugar_eDir_V1) will only work with sugar Community Edition version 6.2.0 . It can only be installed from an activated installation of eDirectory.

You must have administrative access to the Sugar dashboard in order to export (we need this level or permission to export the data correctly).

Trouble Shooting

There are no known issues with this plug in. The only issue you may have are the permissions of the files and getting the permissions correct on the server. If you get an error regarding file permissions, then run the following on the /opportunities/ folder.

```
chmod -r 777
```

If you have any other problems, please contact support on support@edirectory.com.