

Installing und Using MYCRMSPACE Connector for Dimdim & Sugar CE

Version 1.0

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1 Summary

Connector for Dimdim & Sugar CE (CFDS CE) is a simple „web meeting to CRM integration“ solution provided by MYCRMSPACE.

Dimdim is the leading Open Source based web conferencing solution provided by Dimdim Inc.

Sugar is the leading Open Source based customer relationship management solution provided by SugarCRM Inc.

This document contains the topics of installing, configuring and using CFDS.

2 System requirements

- Sugar Community Edition, Sugar Professional Edition, Sugar Enterprise Edition 5.0 / 5.1
- Dimdim Free and Pro 4.0 / 4.5
- Microsoft Internet Explorer 6.0 / 7.0, Mozilla Firefox 1.5x / 2.x

3 Installation

3.1 Preliminary clarifications

Please make sure that you have the latest version of CFDS.

3.2 Installing CFDS

Log into Sugar with administrative rights. Upload the zip file under *Admin > Module Loader* and install. Go to *Admin > Repair* and run *Quick repair*.

4 Configuration

The screenshot shows the SugarCRM interface. At the top, there is a navigation bar with the SugarCRM logo and the text "Welcome, admin [Logout]". Below this is a menu with items like "My Account", "Employees", "Admin", "Training", and "About". A search bar is also present. The main content area is titled "Users: Administrator (admin)" and includes buttons for "Edit", "Change Password", and "Duplicate". Below these buttons, there are fields for "Full Name: Administrator" and "User Name: admin", and a "Status: Active" field. At the bottom, there are "User Settings" for "Administrator" (checked) and "Group User" (unchecked). A red arrow points to the "Dimdim Account" link in the left sidebar.

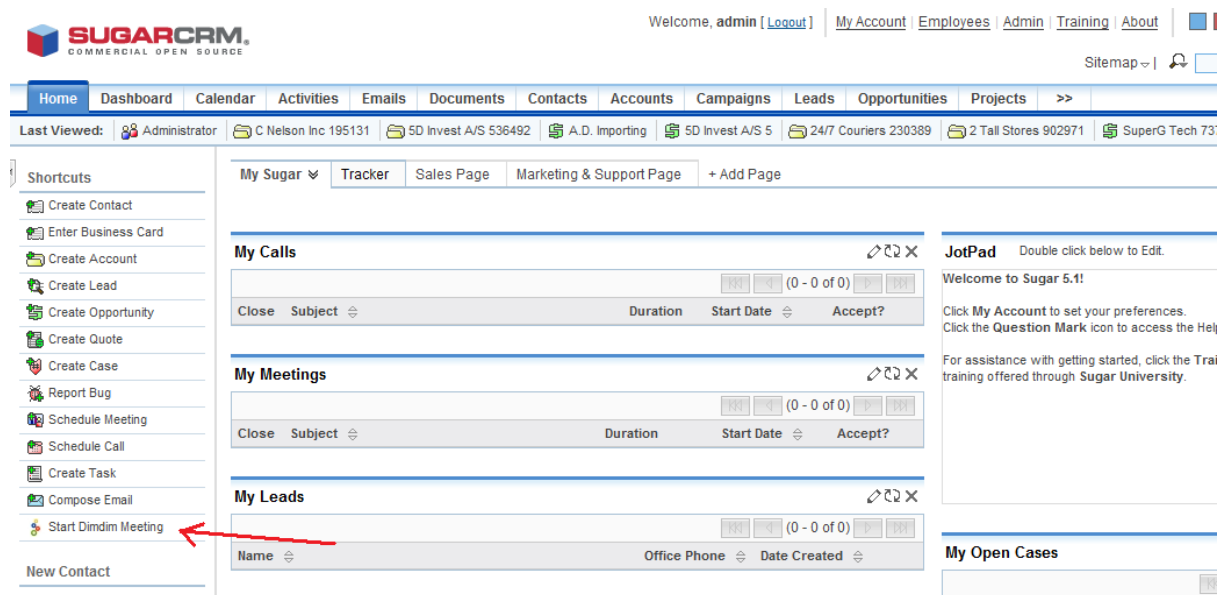
Go to *Admin > User Management* and click on a target user. The system will display a link *Dimdim Account* in the *Shortcuts* section. Click on the link to get to the settings area. Click on the *Edit* button. Enter your Dimdim user name, password, and the Dimdim server address.

Click on *Test settings* to see if the connection between Dimdim and Sugar is ok.

Note: Only if your admin selected *Allow users to change settings* the system you will be allowed to edit the Dimdim account settings.

5 Using CFDS

You will find the Dimdim web meeting link on the Sugar start page, and in the quick menu of the *Contacts* module.

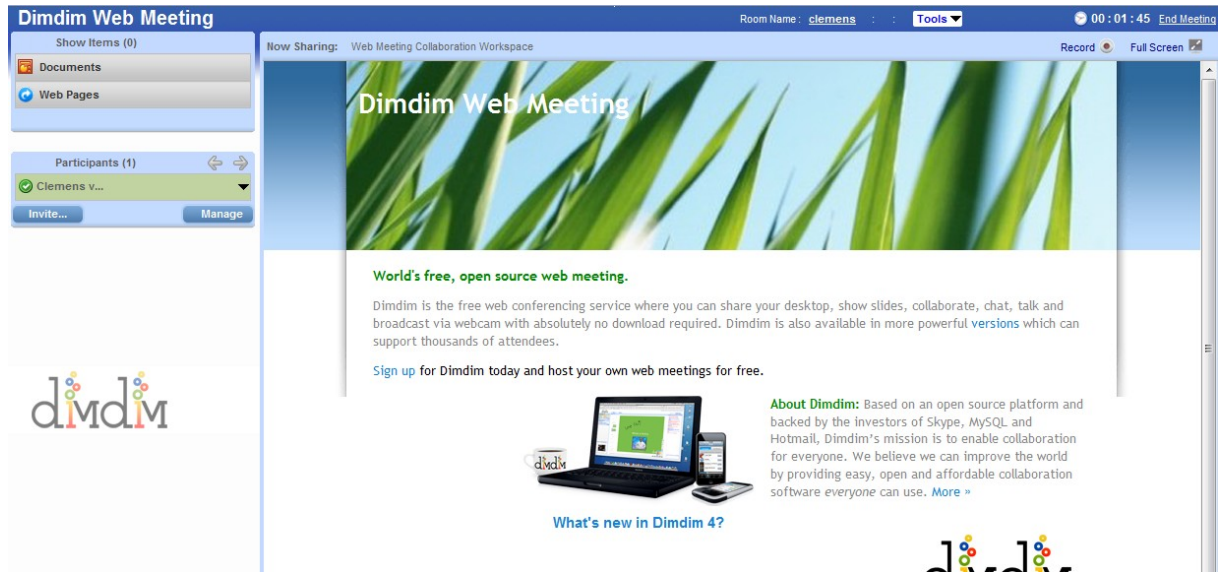


The screenshot shows the SugarCRM dashboard. At the top, there is a navigation bar with the SugarCRM logo and user information. Below that is a main navigation menu with tabs for Home, Dashboard, Calendar, Activities, Emails, Documents, Contacts, Accounts, Campaigns, Leads, Opportunities, and Projects. A secondary menu shows 'Last Viewed' items. On the left, a 'Shortcuts' sidebar lists various actions, with 'Start Dimdim Meeting' highlighted by a red arrow. The main content area displays 'My Calls', 'My Meetings', and 'My Leads' sections, each with a table header and a '0 - 0 of 0' indicator. A 'JotPad' section is visible on the right.

Click on *Start Dimdim Meeting*. The system will open a new browser tab and you will be automatically logged into your Dimdim web meeting room.

Note: The system will use the default settings (*Preferences*) if your Dimdim web account once the meeting started.

You can now invite attendees from Dimdim and proceed as you please. Please get the official Dimdim *Quick Reference* for more informations about using Dimdim web meeting.



6 CFDS CE vs PRO features in comparison

CE vs PRO in comparison	CE	PRO
Start Dimdim instant web meeting with one click from Sugar.	X	X
Schedule Dimdim web meeting via Sugar`s meeting module. Set preferences for the web meeting and send email invitation to participants.	-	X
Start web meeting from email invitation, Sugar calendar or from the meeting record.	-	X

7 About MYCRMSPACE & Contact

MYCRMSPACE is a systems integrator helping organisations of all sizes to accelerate user adoption and effectiveness of the leading Open Source CRM and Web Conferencing solutions.

The company offers comprehensive project services and an range of product enhancements for SugarCRM and Dimdim.

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8 Legal imprint

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