

SugarCRM Integration for Alchemer Survey

⚙️ **Note:** Integrations are part of Alchemer's **Connect Pillar** and are only available to **enterprise customers**. If you're interested in enabling this feature, please contact an Alchemer representative [↗](#) to learn more.

Overview

The **SugarCRM integration** connects your Alchemer surveys and workflows with your SugarCRM environment. With this integration, you can push data from Alchemer into SugarCRM or pull data from SugarCRM into Alchemer to create personalized, dynamic survey experiences.

Key benefits

- Keep SugarCRM records up to date with responses collected in Alchemer.
- Pull in CRM data to personalize surveys and improve engagement.
- Automate customer data workflows to save time and reduce manual updates.

Common use cases

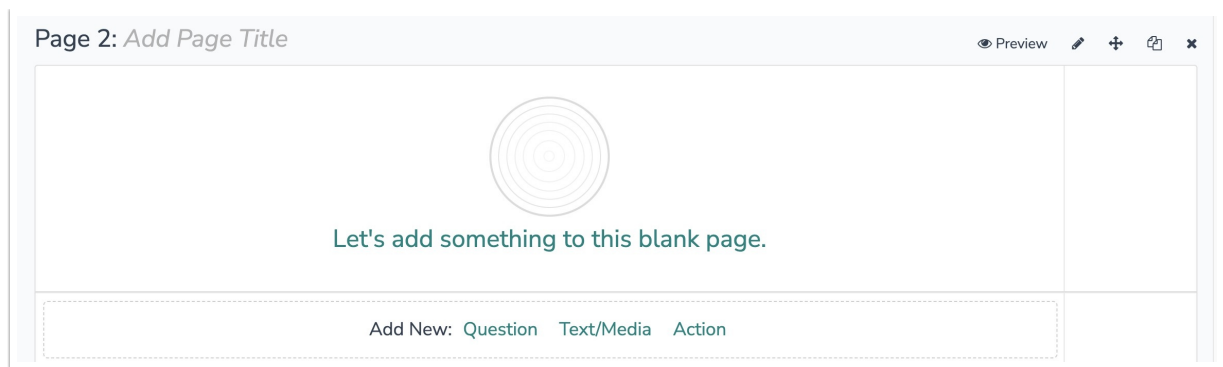
- Send a survey and update a lead or contact record in SugarCRM with the response data.
- Personalize survey questions by pulling demographic information or account details from SugarCRM.
- Create a new record in SugarCRM when a survey response matches specific criteria (e.g., generating a new lead).

Integration Setup

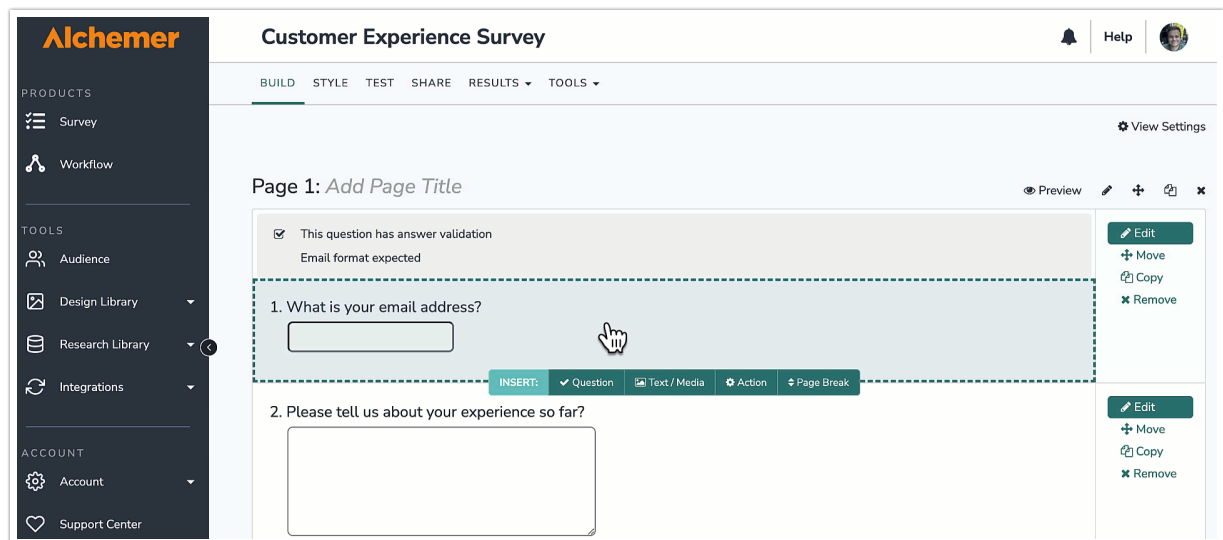
Adding an Integration Action

1. Select an existing survey or create a new survey. Then navigate to the Survey Builder.
2. Click "Add New: Action"

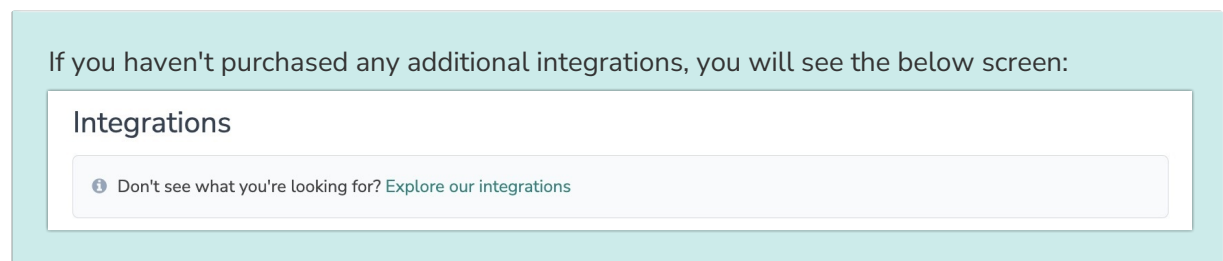
You cannot add this Integration Action to the first page of the survey.



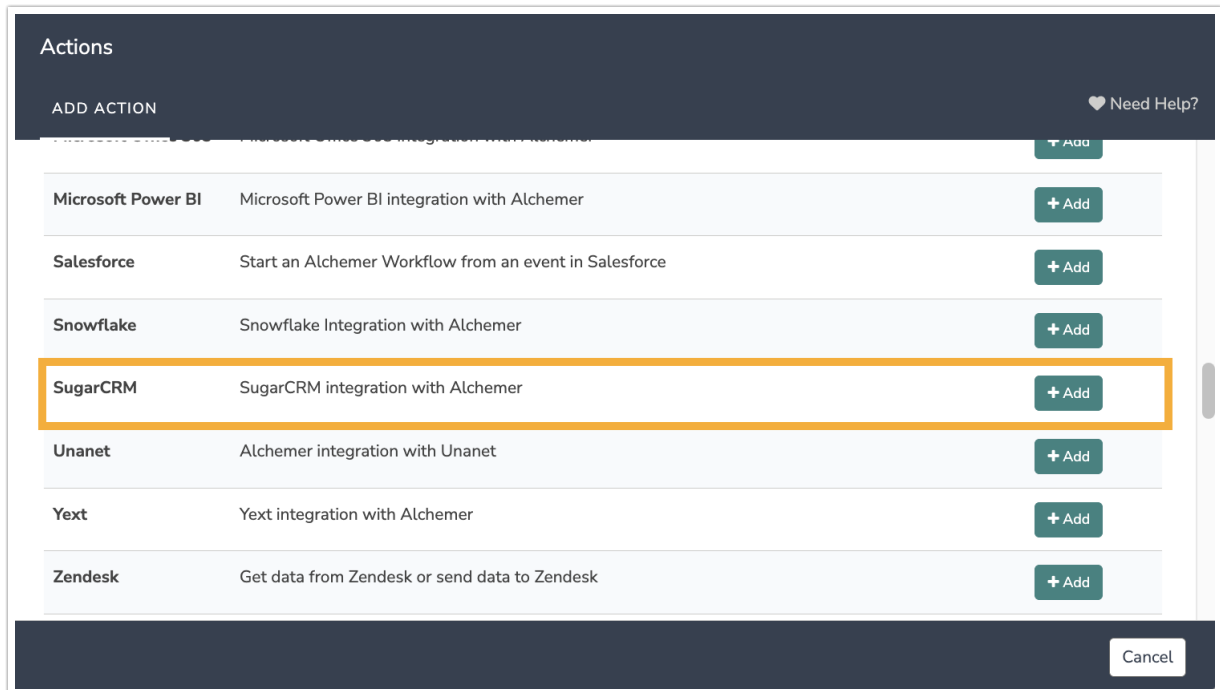
3. In the Add Action modal, scroll down to Integrations. Then click "Add" for one of your purchased integrations.



If you haven't purchased any additional integrations, you will see the below screen:



4. Select SugarCRM under "Your Integrations".



Once you've added the SugarCRM integration to your Alchemer account, you'll be able to configure actions for your surveys and workflows. The following actions are available:

SugarCRM: [Update Record](#)

SugarCRM: [Create Record](#)

SugarCRM: [Get Record](#)

Update Record

Use this action to **update an existing record in SugarCRM** with data collected from an Alchemer survey.

You will need:

- To authenticate with SugarCRM
- Your module name, case sensitive
- A sample record ID
- Fields in this survey used to find the record to update
- Fields in this survey used to update the record information

Configure Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Update record

Update a record in SugarCRM of any type

You will need:

- To authenticate with SugarCRM
- Your module name, case sensitive
- A sample record ID
- Fields in this survey used to find the record to update
- Fields in this survey used to update the record information

Need help? [Learn more](#)

v250716

PreviousNext

Setup steps:

Navigate to your survey and select **Integrations > SugarCRM**.

1. Choose **Add Action > Update Record**.

Configure Action

PRIMARY SETUPLOGICADVANCED

< Back

Select Action

Select the action you would like to perform.

Update record

Update a record in SugarCRM

Create record

Create a record in SugarCRM

Get record

Get a record in SugarCRM

Cancel

Next

2. SugarCRM | Authenticate


Authenticate with SugarCRM

Edit Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Authentication

Authenticate with SugarCRM

 SugarCRM connected
PRODUCTIONUS:C719797:T1036009's SugarCRM account

▼

...

PreviousNext

3. SugarCRM | Select module

Enter the SugarCRM name you would like to use.

Edit Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Select module

Enter the SugarCRM Module name you would like to use

Select a standard record type*

Contacts

▼

OR

Enter a custom record type(optional)

<empty string>

Example: Accounts
This is case sensitive

PreviousNext

4. SugarCRM | Sample record

Enter the record ID of your sample record.

Edit Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Sample record

We will get a sample record to identify available fields.
Enter the record ID of your sample record.

Sample record ID*

83ba0fd0-5357-11ef-9e53-0259bdb7a7c9

5. SugarCRM | Find record

Select the fields in this survey that contain the values you want to use to find the specific record in SugarCRM.

7. SugarCRM | Get data back

Select the fields you want to get back. This is optional.

Edit Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Get data back

Select the fields you want to get back. This is optional.

Use this field

To update this Alchemer survey field

Action | Metadata | message

Question | 3. Output (id: 4)

Add a new mapping

PreviousNext

8. SugarCRM | Setup complete

[illegible]

Get Record

Use this action to **pull data from SugarCRM into Alchemer** for use in surveys or email campaigns.

You will need:

- To authenticate with SugarCRM
- Your module name, case sensitive
- A sample record ID
- Fields in this survey used to find the record
- Fields in this survey where you can save the record information

Configure Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Get record

Get a record in SugarCRM of any type

You will need:

- To authenticate with SugarCRM
- Your module name, case sensitive
- A sample record ID
- Fields in this survey used to find the record
- Fields in this survey where you can save the record information

Need help? [Learn more](#)

v250718

Previous

Next

Setup steps:

1. Navigate to your survey and select **Integrations > SugarCRM**.
2. Choose **Add Action > Get Record**.

Configure Action

PRIMARY SETUPLOGICADVANCED

< Back

Select Action

Select the action you would like to perform.

Update record
Update a record in SugarCRM

Create record
Create a record in SugarCRM

Get record
Get a record in SugarCRM

Cancel

Next

3. SugarCRM | Authentication


Authenticate with SugarCRM

Configure Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Authentication

Authenticate with SugarCRM

 SugarCRM connected
PRODUCTIONUS:C719797:T1036009's SugarCRM account

▼

...

Previous

Next

4. SugarCRM | Select module

Enter the SugarCRM Module name you would like to use.

Edit Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Select module

Enter the SugarCRM Module name you would like to use

Select a standard record type*

Contacts

Select a standard record type

▼

OR

Enter a custom record type(optional)

<empty string>

Example: Accounts
This is case sensitive

5. SugarCRM | Sample record

Enter the record ID of your sample record.

Edit Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Sample record

We will get a sample record to identify available fields.
Enter the record ID of your sample record.

Sample record ID*

0cb5597e-5359-11ef-8e25-063b0cd98a86

6. SugarCRM | Find record

Select the fields in this survey that contain the values you want to use to find the specific record in SugarCRM.

Edit Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Find record

Select the fields in this survey that contain the values you want to use to find the specific record in SugarCRM

If you select more than one field they are combined with the AND operator

Use this Alchemer field value

to match this SugarCRM field

Question | 1. Input 1 (id: 2)

SugarCRM | email

Add a new mapping

PreviousNext

7. SugarCRM | Get data back

Select the fields you want to get back.

Edit Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Get data back

Select the fields you want to get back.

Use this SugarCRM field

Action | Metadata | message

SugarCRM | first_name

SugarCRM | last_name

Add a new mapping

To update this Alchemer survey field

Question | 2. Message (id: 4)

Question | 3. First (id: 5)

Question | 4. Last (id: 6)

Previous

Next

8. SugarCRM | Setup complete

Edit Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Setup complete

A log of each run result can be found in the Individual Responses > Action Log

A status code is available in the action metadata:
200: A single record was successfully found
201: Query ran successfully, but no records were found
202: More than one record was found. The first record is used for the values returned to Alchemer
400: The external integration returned an error

Previous

Save

Create Record

Use this action to **create a new record in SugarCRM** when certain survey conditions are met.

You will need:

- To authenticate with SugarCRM
- Your module name, case sensitive
- A sample record ID
- Fields in this survey used to create the record

Configure Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Create record

Create a record in SugarCRM of any type

You will need:

- To authenticate with SugarCRM
- Your module name, case sensitive
- A sample record ID
- Fields in this survey used to create the record

Need help? [Learn more](#)

v250718

PreviousNext

Setup steps:

1. Navigate to your survey and select **Integrations > SugarCRM**.
2. Choose **Add Action > Create Record**.

Configure Action

PRIMARY SETUPLOGICADVANCED

< Back

Select Action

Select the action you would like to perform.

Update record

Update a record in SugarCRM

Create record

Create a record in SugarCRM

Get record

Get a record in SugarCRM

Cancel

Next

3. SugarCRM | Authentication

Authenticate with SugarCRM.

Configure Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Authentication

Authenticate with SugarCRM

SugarCRM connected

PRODUCTIONUS:C719797:T1036009's SugarCRM account

⌵

...

Previous

Next

4. SugarCRM | Select module

Enter the SugarCRM Module name you would like to use.

Configure Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Select module

Enter the SugarCRM Module name you would like to use

Select a standard record type*

Accounts

OR

Enter a custom record type(optional)

<empty string>

Example: Accounts

This is case sensitive

PreviousNext

5. SugarCRM | Sample record

Enter the record ID of your sample record.

Edit Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Sample record

We will get a sample record to identify available fields.

Enter the record ID of your sample record.

Sample record ID*

05ee3a5c-6bb8-11f0-923f-e95adae7804a

PreviousNext

6. SugarCRM | Create record

Select the fields in this survey that contain the values you want to use to create the record in SugarCRM.

Edit Action

PRIMARY SETUPLOGICADVANCED

SugarCRM | Create record

Select the fields in this survey that contain the values you want to use to create the record in SugarCRM

Use this Alchemer field value

to match this SugarCRM field

Question | 1. Input1 (id: 2)

SugarCRM | first_name

Add a new mapping

PreviousNext

7. SugarCRM | Get data back

Select the fields you want to get back.

Related Articles