SugarCRM Integration for Alchemer Survey

> The Alchemer SugarCRM Integration is available as an add-on and only available to customers in enterprise plans. If you are interested in purchasing the SugarCRM Integration, please contact us for additional information.

As an Alchemer user, you may want to update a record in SugarCRM when a customer submits a survey or interacts with your feedback program. With this integration, you can:

- Keep CRM records aligned with new customer data
- Trigger updates across multiple SugarCRM modules
- Automate data flow without manual entry

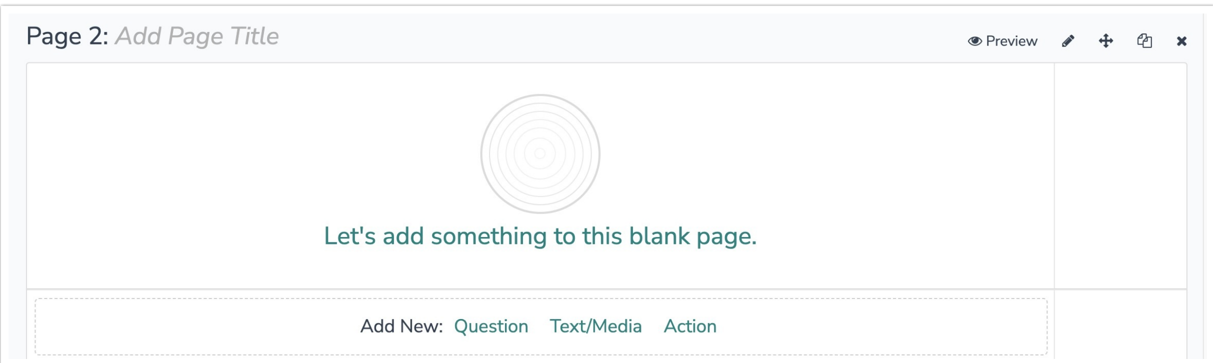
Integration Setup

Adding an Integration Action

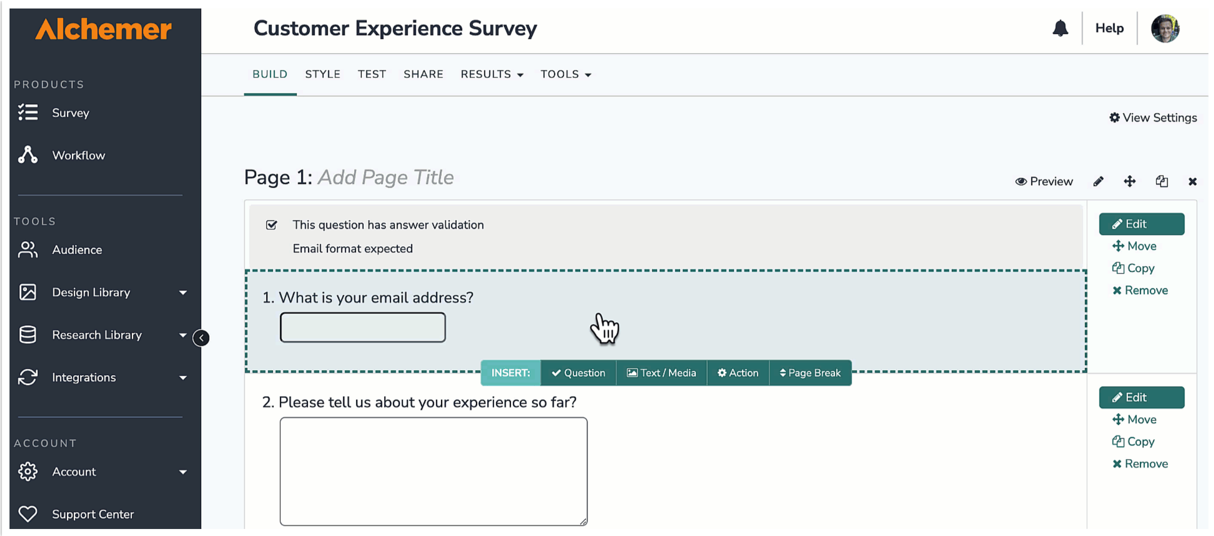
1. Select an existing survey or create a new survey. Then navigate to the Survey Builder.

2. Click "Add New: Action"

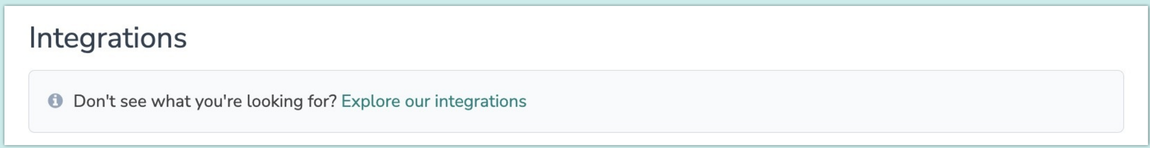
> You cannot add this Integration Action to the first page of the survey.



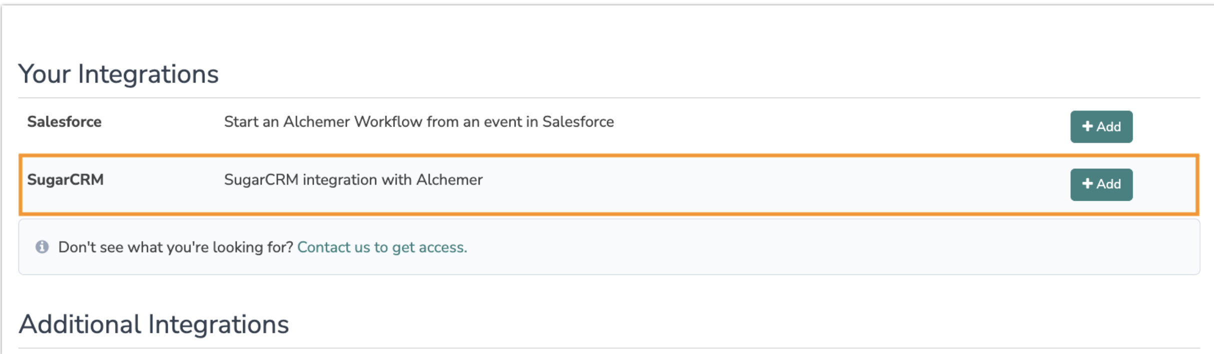
3. In the Add Action modal, scroll down to Integrations. Then click "Add" for one of your purchased integrations.



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

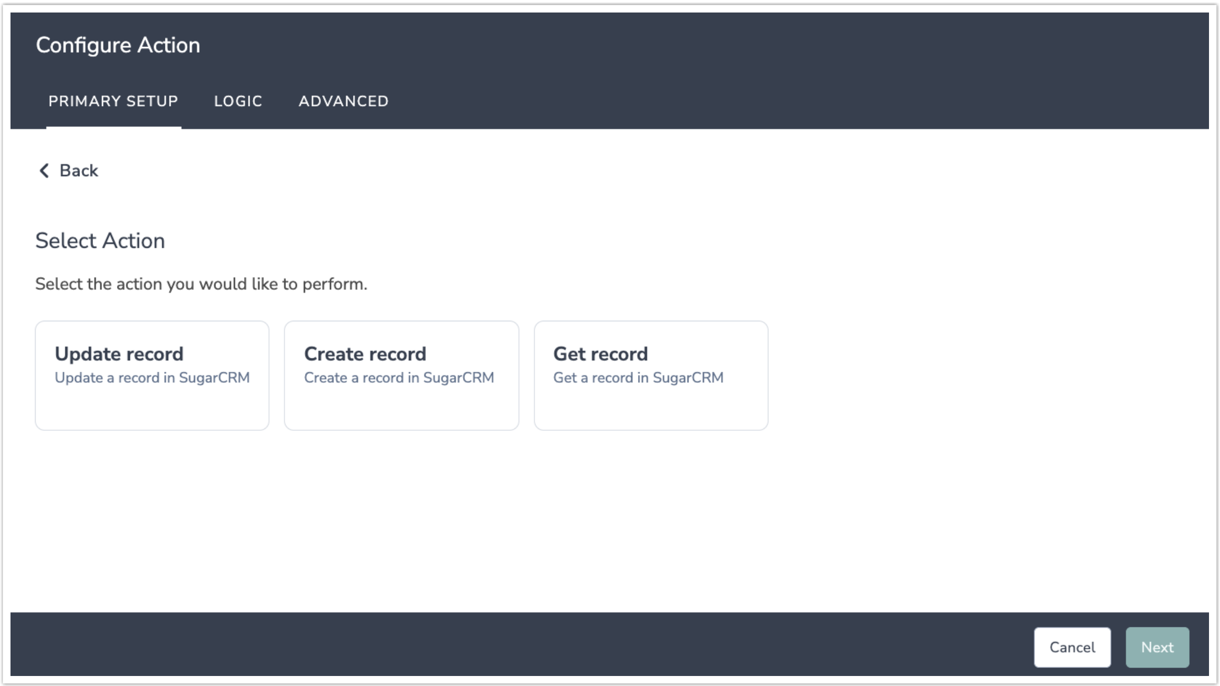


4. Select SugarCRM under "Your Integrations".

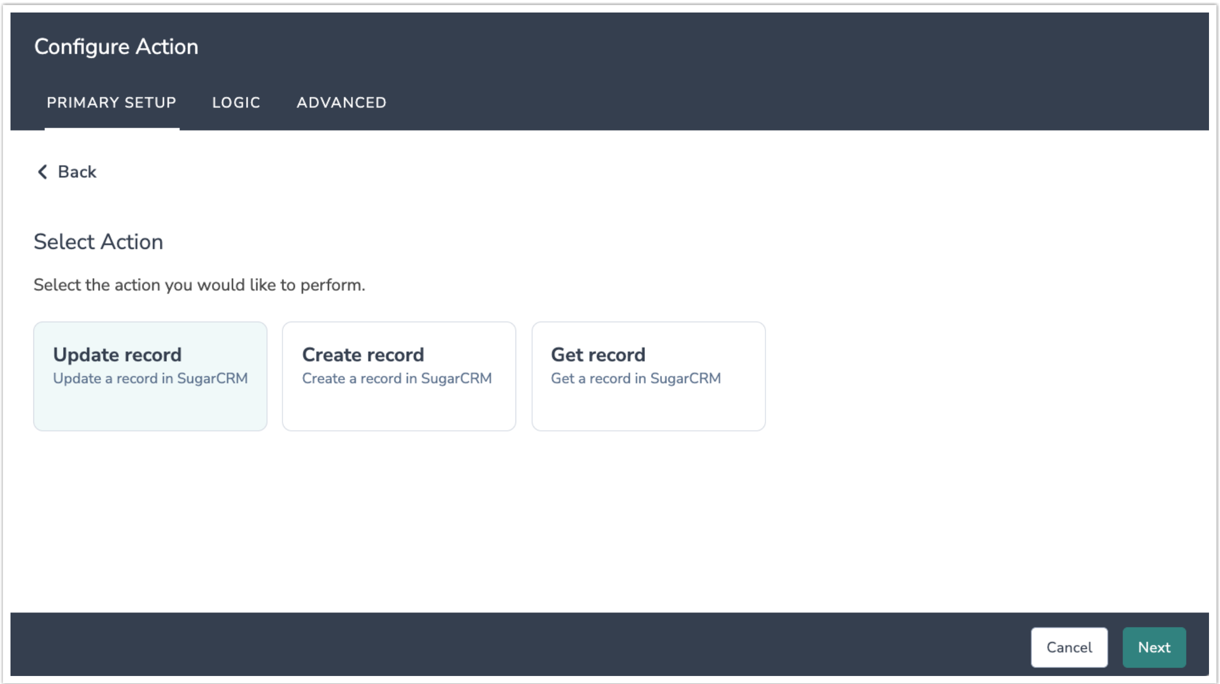


5. Select the action you would like to perform:

- SugarCRM: Update record. Jump to section.
- SugarCRM: Create record. Jump to section.
- SugarCRM: Get record. Jump to section.



SugarCRM |Update Record



How it works

The SugarCRM: Update Record step can be added to any workflow. Once configured, it searches for a matching record based on your input fields and updates the specified fields with new values.

Supported modules

You can update records in any standard or custom module in your SugarCRM instance, including:

- Contacts
- Leads
- Opportunities
- Accounts
- Custom modules

Matching criteria

Records are located using one or more input fields. For example, you can search by:

- Email address
- Record ID
- Custom field values

Fields to update

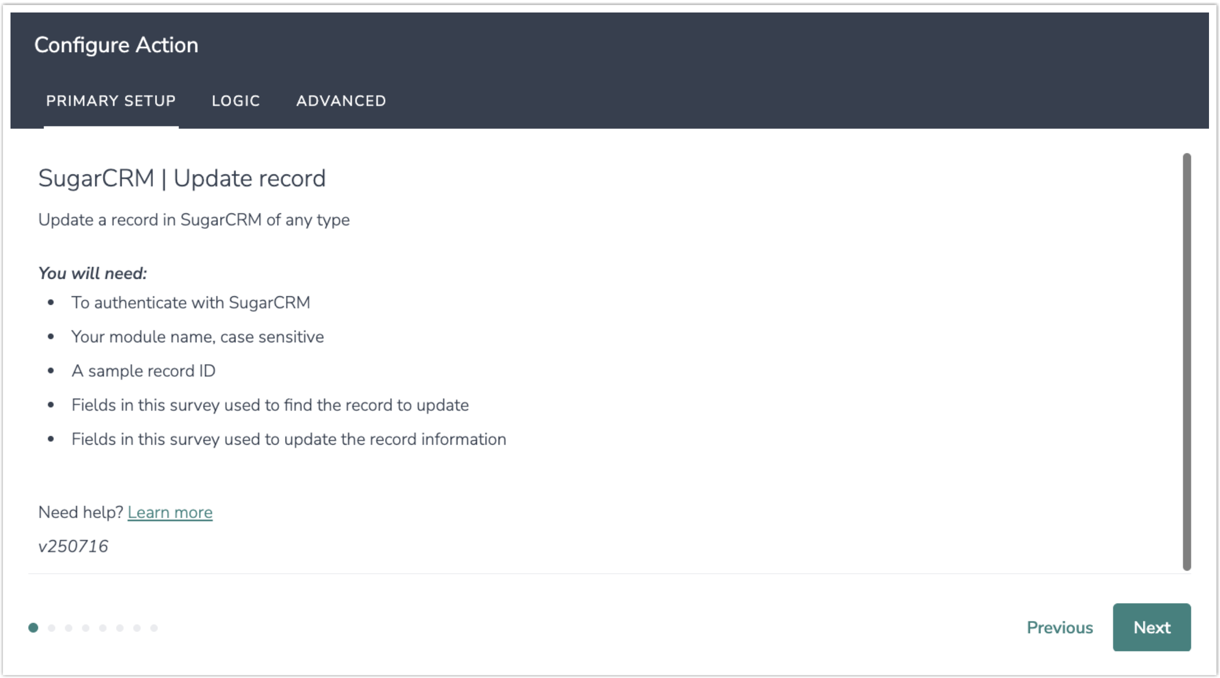
Once a record is matched, you can specify which fields should be updated. Multiple fields can be updated simultaneously.

Set up the integration

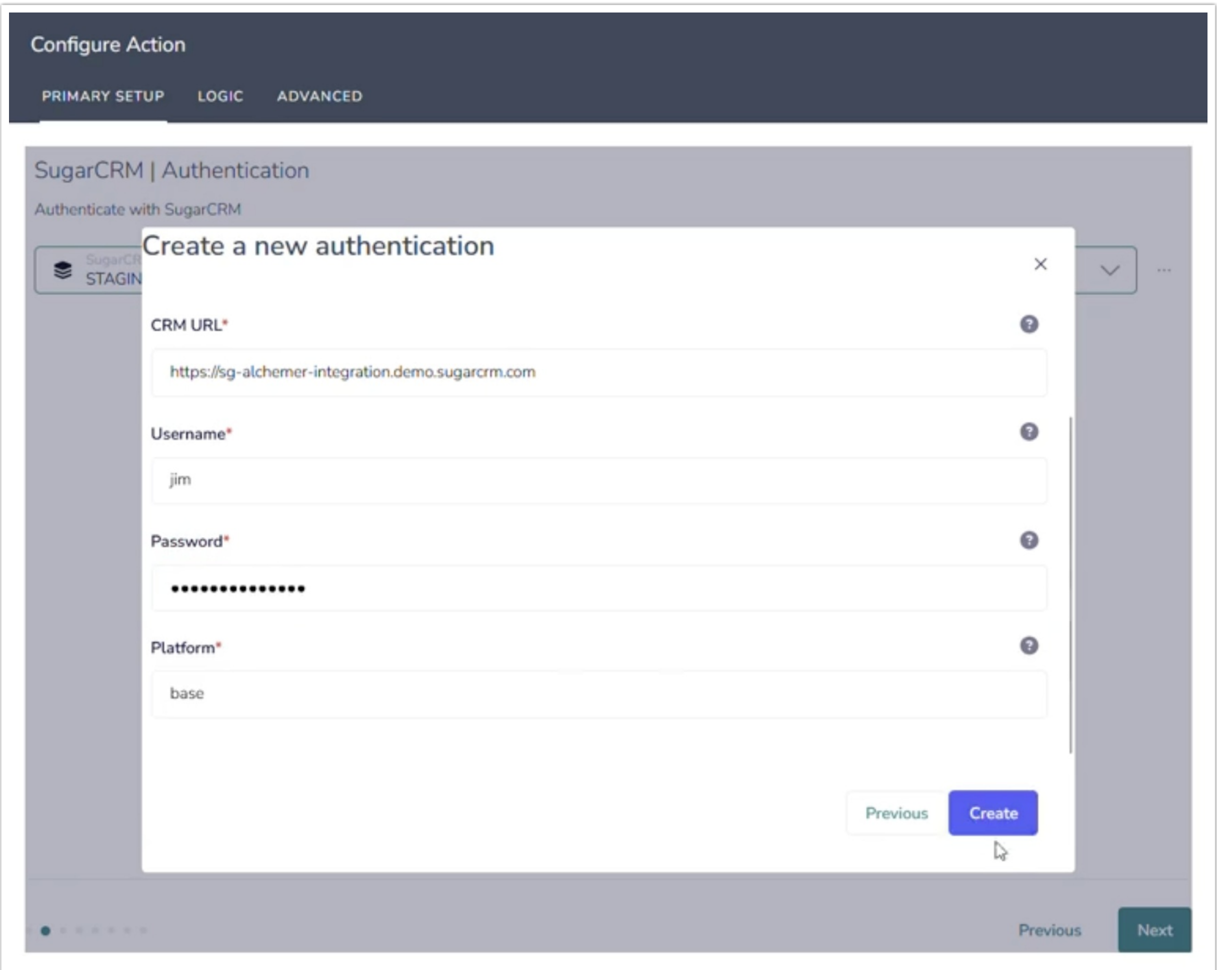
1. Update a record in SugarCRM of any type.

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

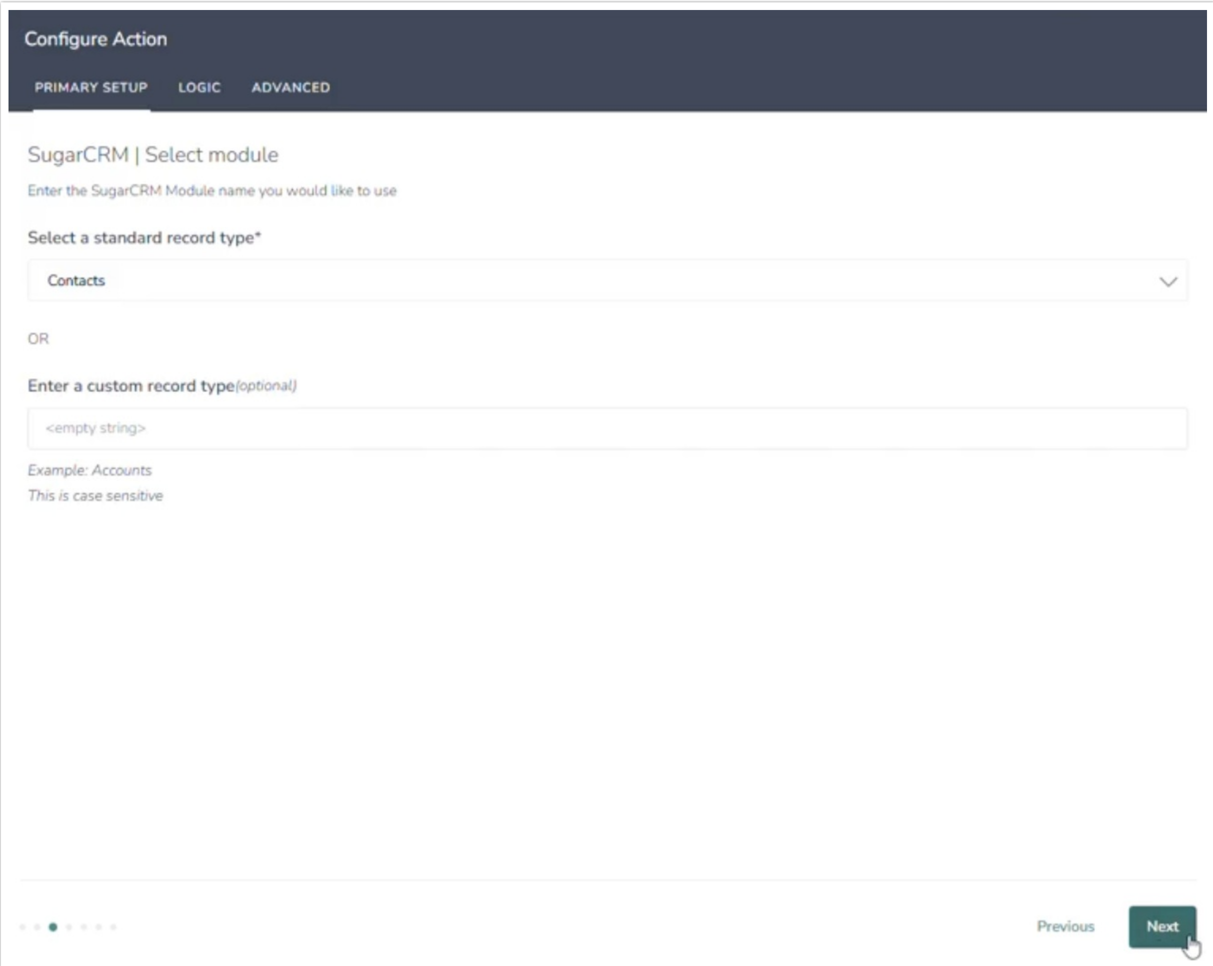


2. Create new authentication.



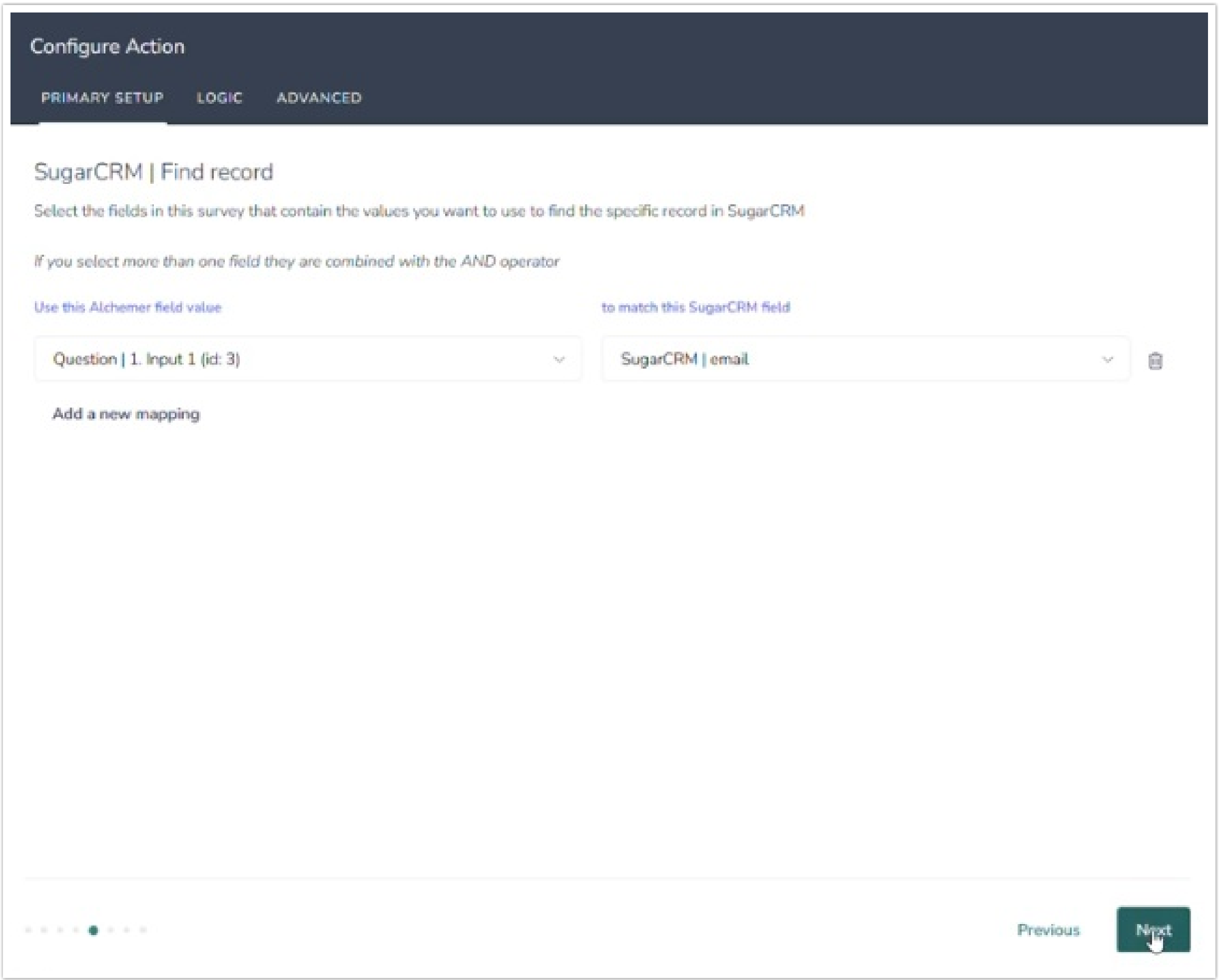
3. Select Module

Enter the SugarCRM Module name you would like to use.



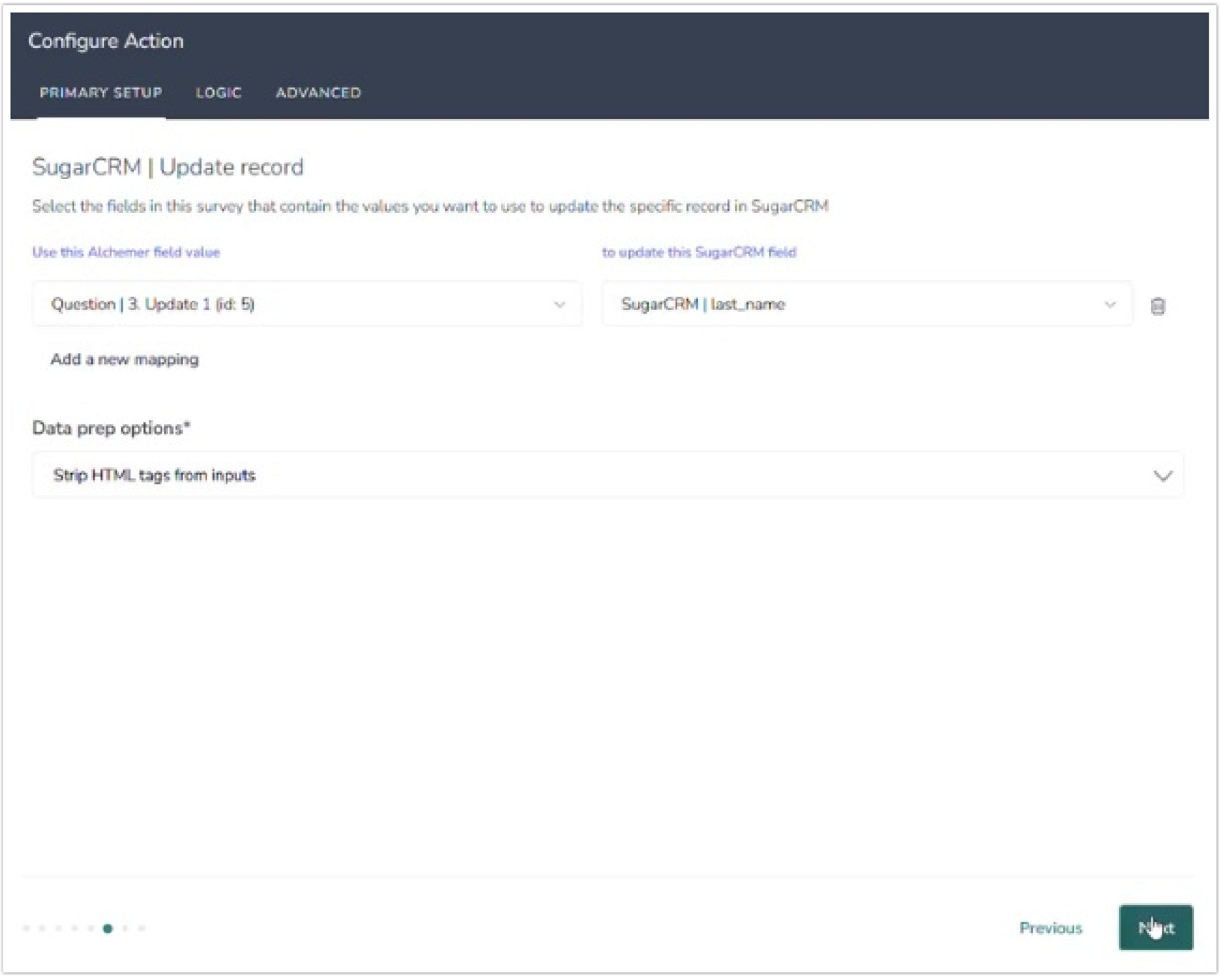
4. Find Record

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



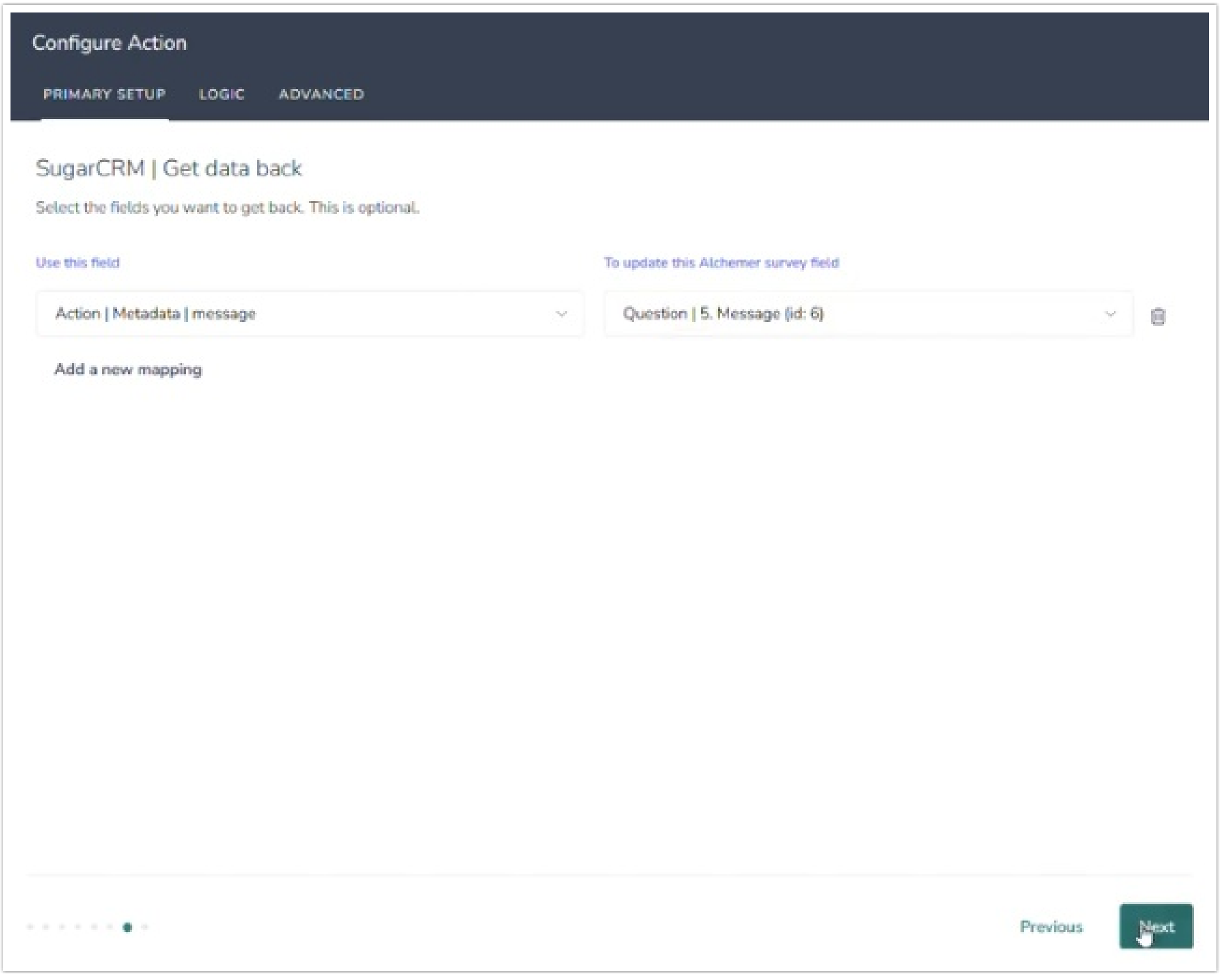
5. Update Record

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



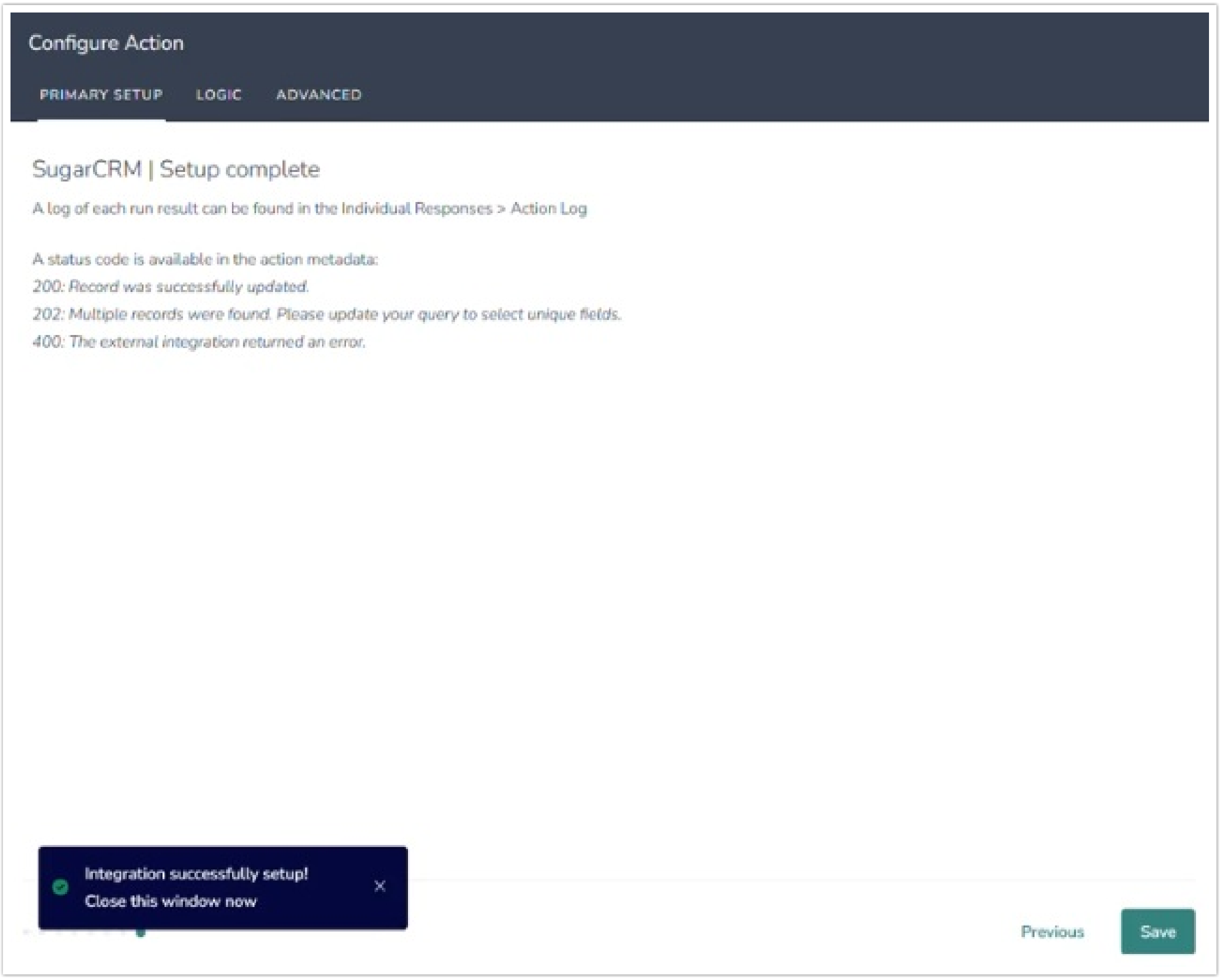
6. Get data back

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



7. Setup Complete

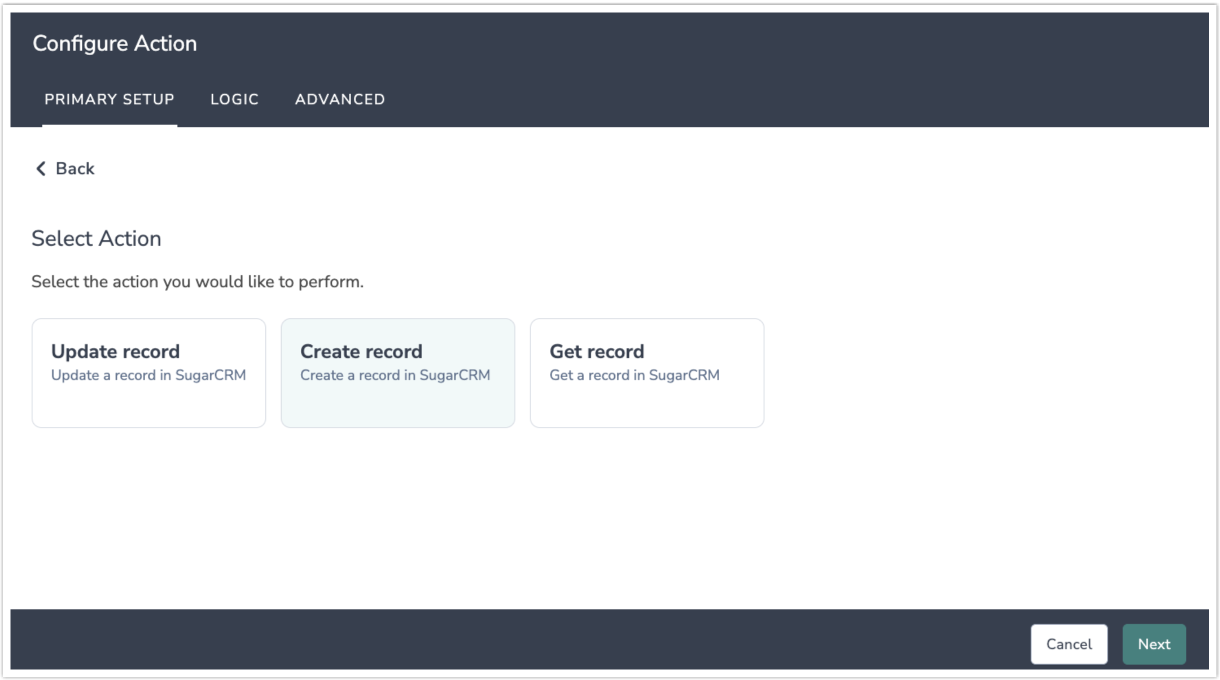
A log of each run result can be found in the Individual Responses > Action Log



Tips

- Ensure your query fields uniquely identify records to prevent unintentional updates.
- Use dynamic values from survey responses or previous workflow steps to personalize updates.
- Test updates in a sandbox environment before applying to production.

SugarCRM | Create Record



The **SugarCRM: Create Record** integration allows you to automatically create new records in any SugarCRM module directly from an Alchemer survey. This enables your team to capture leads, log issues, or initiate workflows based on survey responses—without manual data entry.

Use case

As an Alchemer user, you may want to generate new entries in SugarCRM when a respondent submits a survey. With this integration, you can:

- Create contacts, leads, opportunities, or other records
- Populate multiple fields using survey data
- Automate CRM data creation in real time

How it works

The SugarCRM: Create Record action can be added to any survey. Once configured, it will create a new record in the selected module using mapped survey responses.

Supported modules

You can create records in any SugarCRM module, including:

- Contacts
- Leads
- Opportunities

- Accounts
- Custom modules

Field mapping

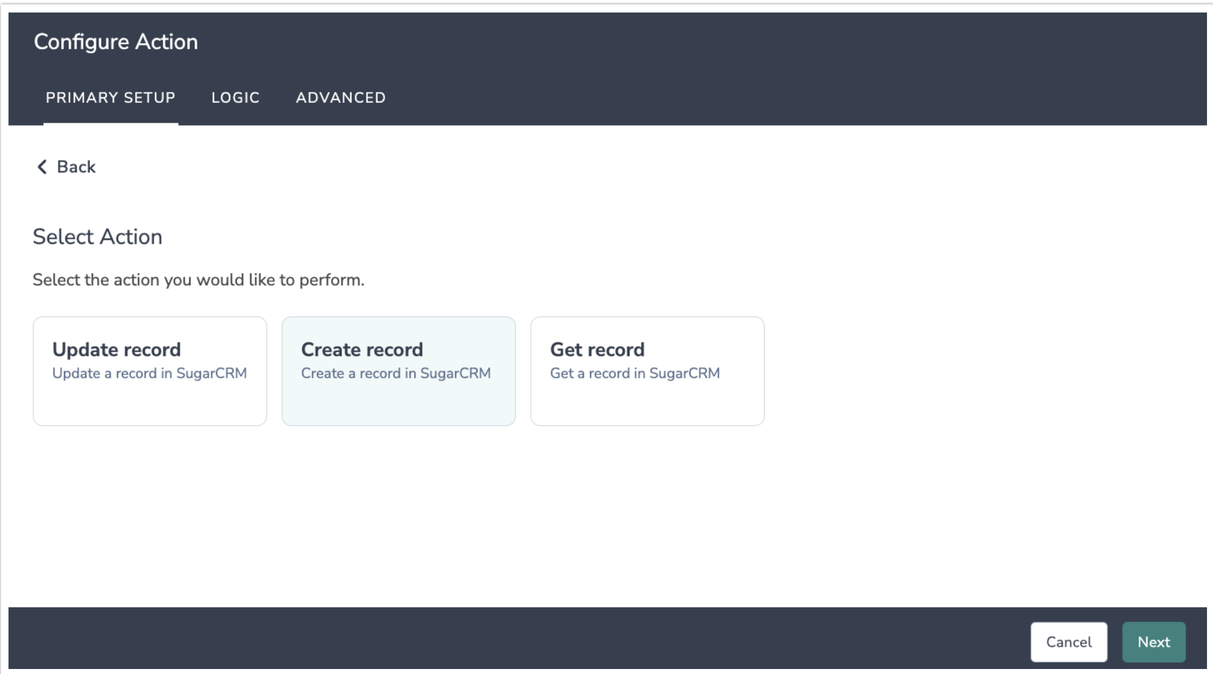
Survey responses can be mapped to any available fields in the selected module. You can use multiple survey questions to populate multiple fields in the new record.

Set up the integration

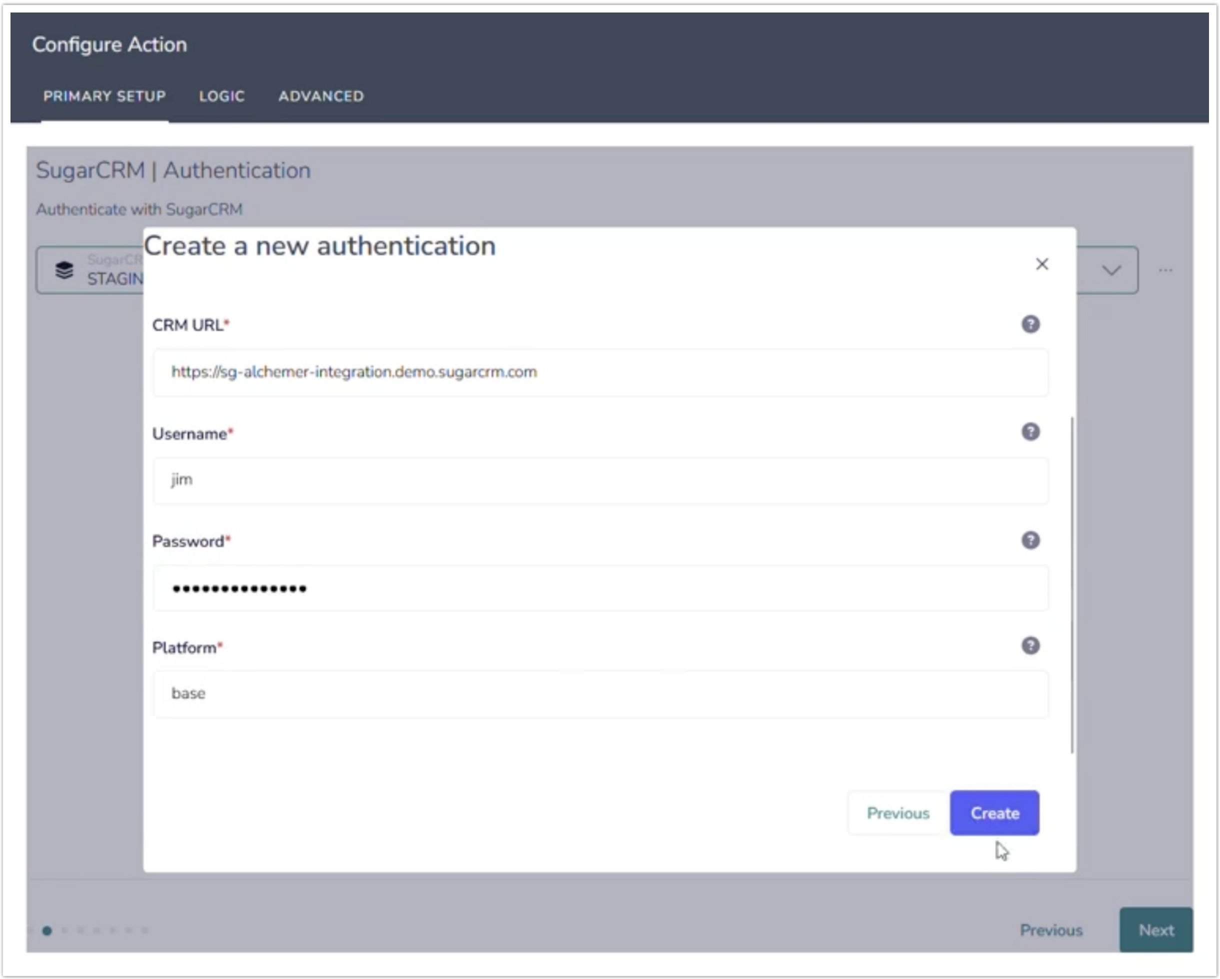
1. Update a record in SugarCRM of any type.

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

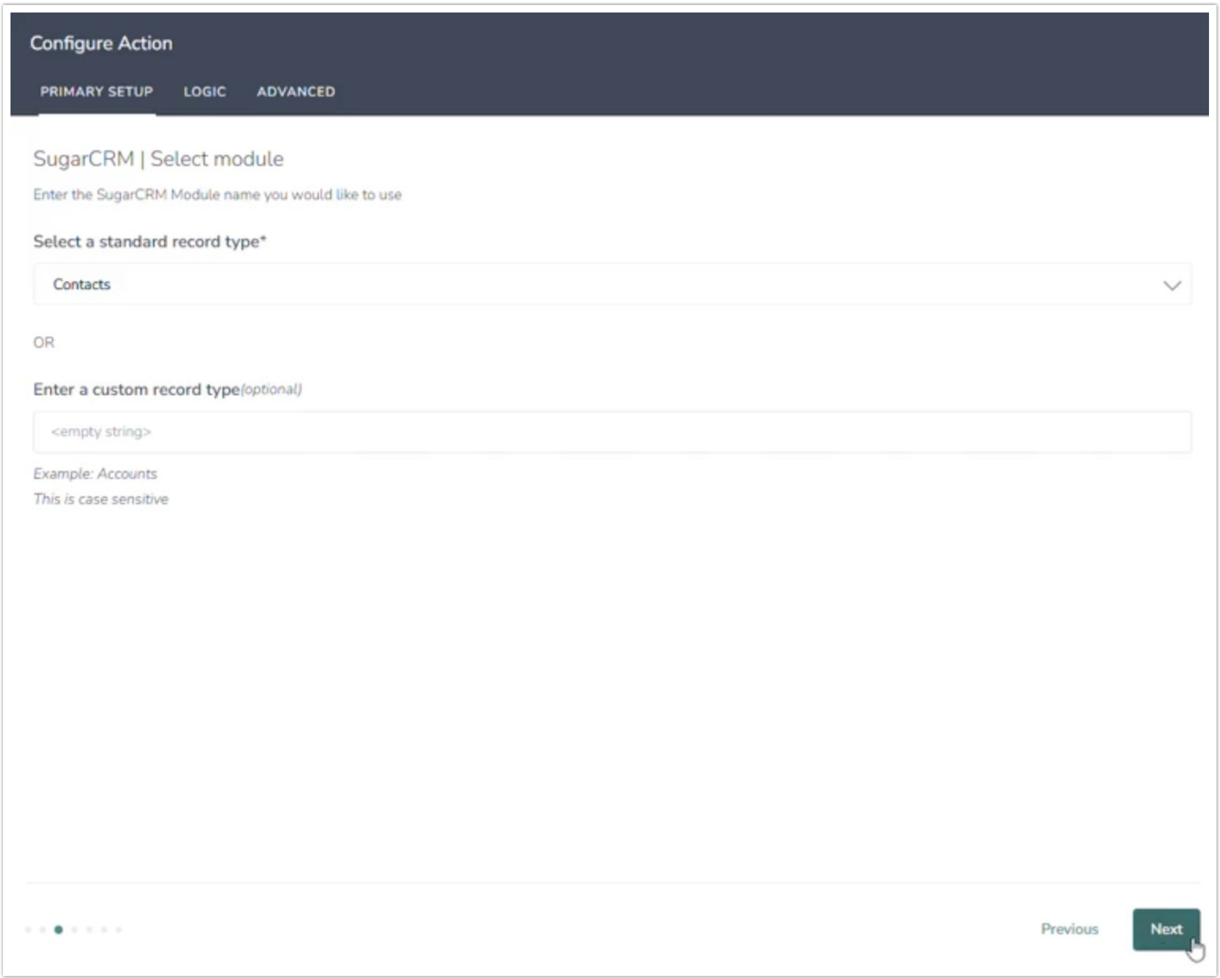


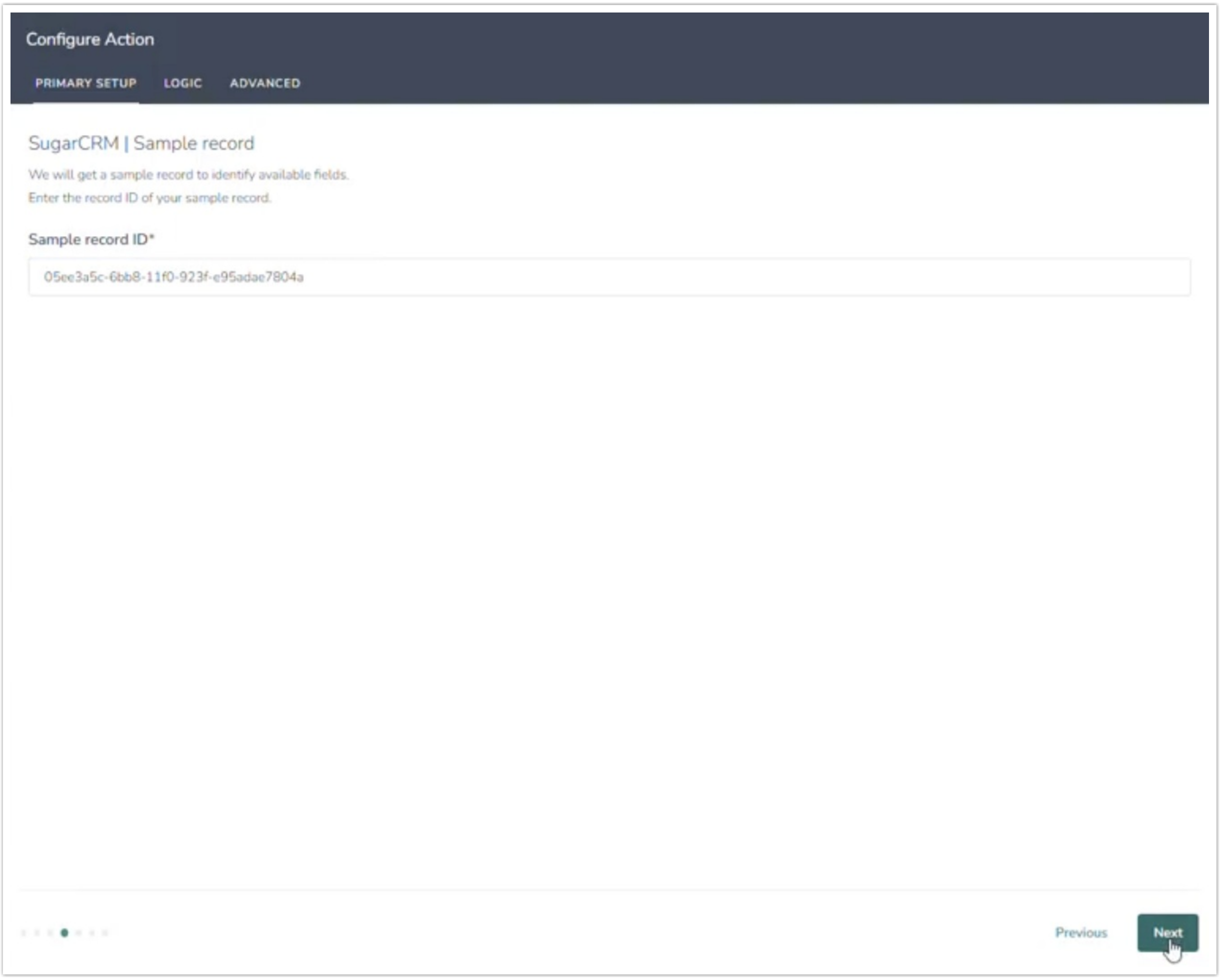
2. Create new authentication.



3. Select Module

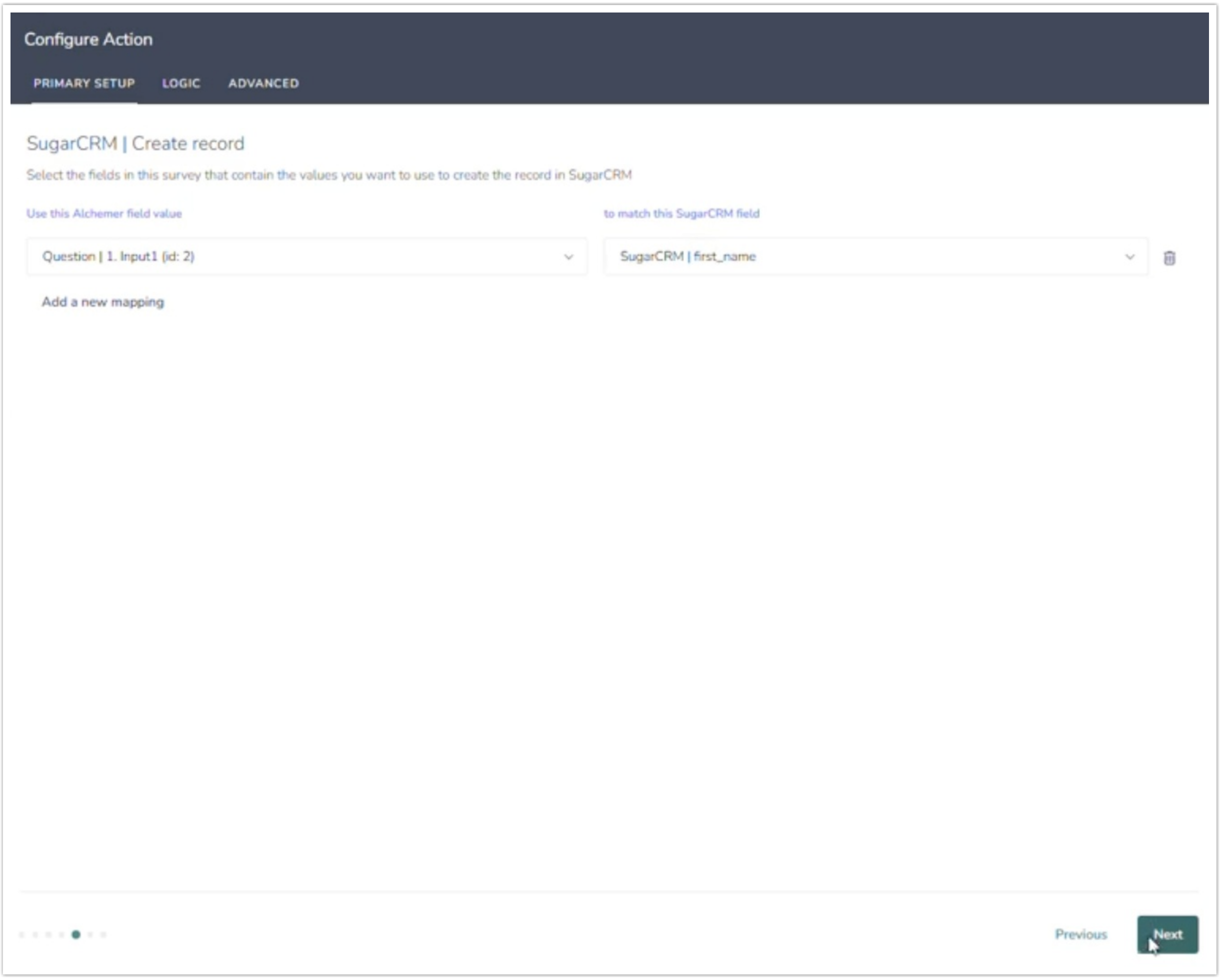
Enter the SugarCRM Module name you would like to use.


Configure Action
PRIMARY SETUP
LOGIC
ADVANCED
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
Previous
Next



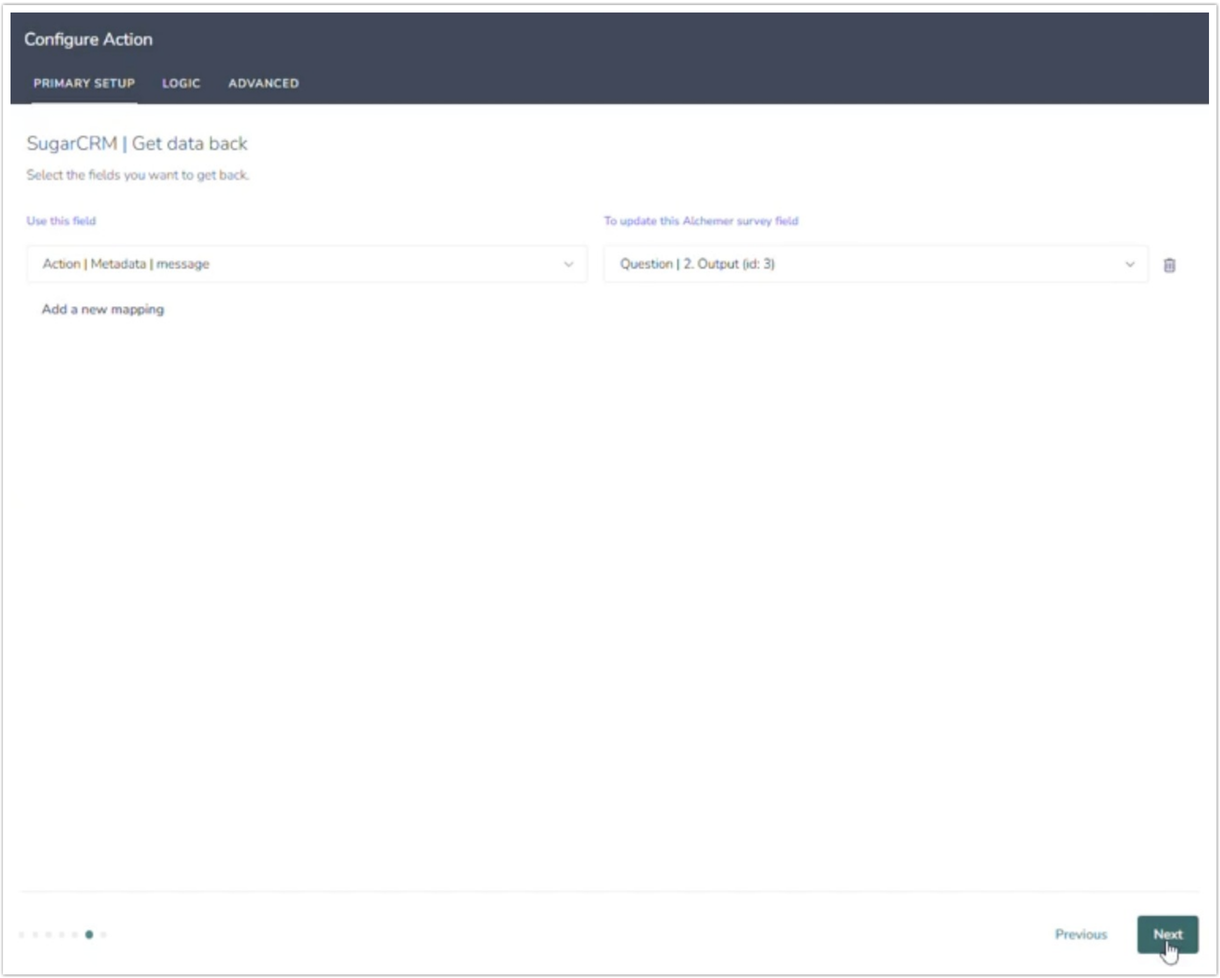
4. Create Record

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



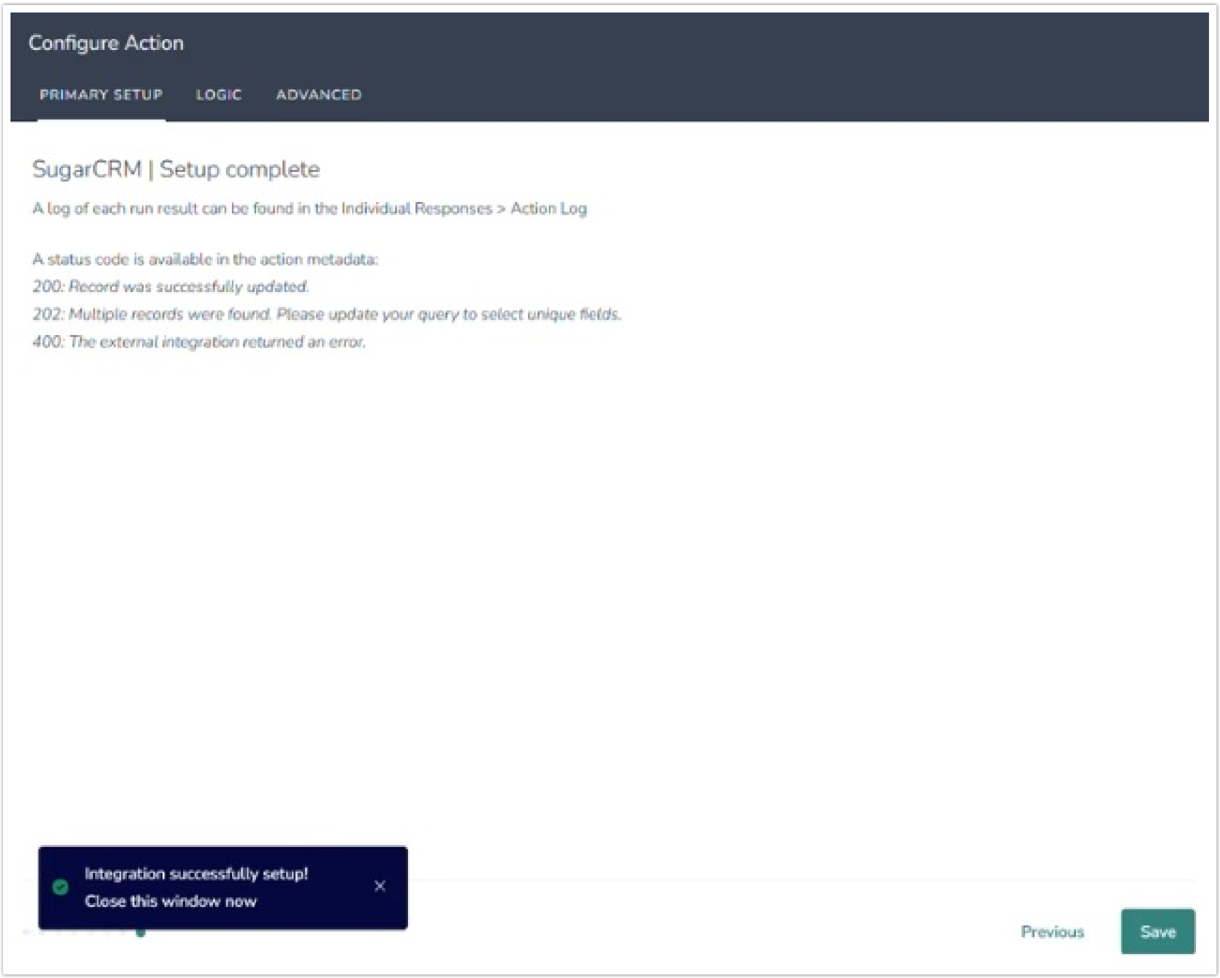
6. Get data back

Select the fields you want to get back.



7. Setup Complete

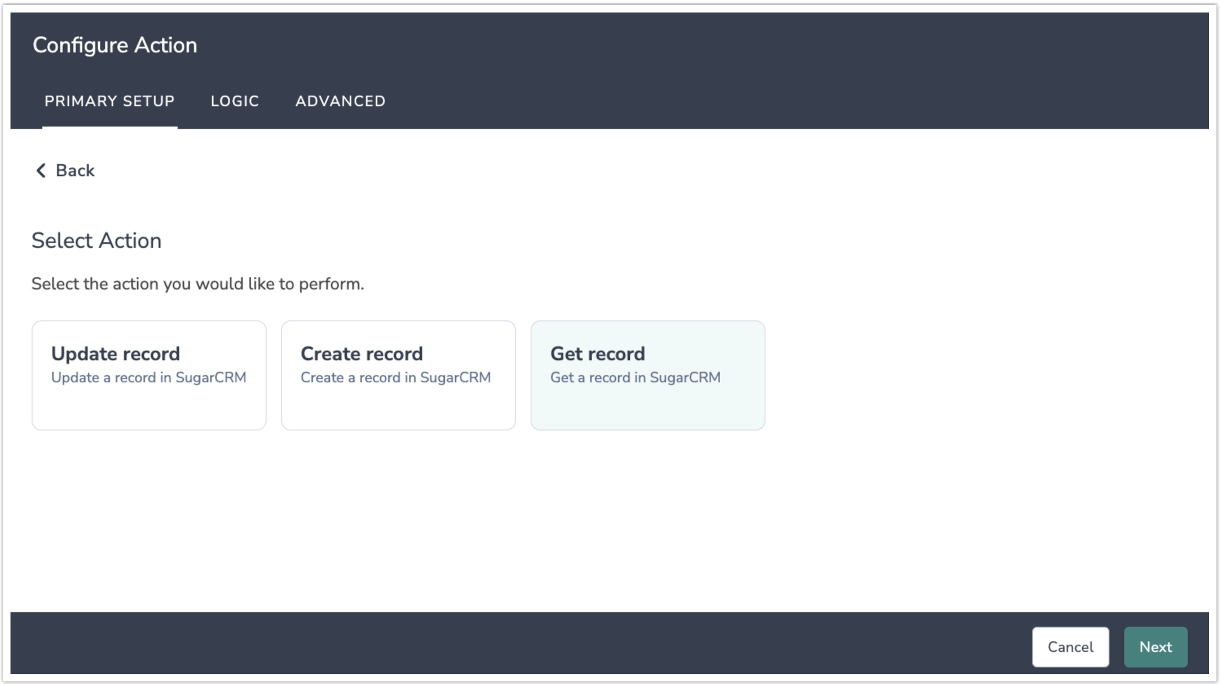
A log of each run result can be found in the Individual Responses > Action Log



Tips

- Use hidden fields or pre-populated values to customize record creation.
- Ensure required fields in your SugarCRM module are mapped to survey responses.
- Combine with logic rules to only create records when certain conditions are met.

SugarCRM | Get Record



The **SugarCRM: Get Record** integration allows you to retrieve existing record details from a specific SugarCRM module, based on information provided in an Alchemer survey. This enables dynamic surveys that personalize content or logic based on up-to-date CRM data.

Use case

As an Alchemer user, you may want to prefill survey questions with CRM data or make decisions based on a contact's existing information. With this integration, you can:

- Look up a contact, lead, or account in SugarCRM
- Prefill survey questions with CRM field values
- Personalize survey flow based on retrieved data

How it works

The SugarCRM: Get Record action can be added to a survey. When triggered, it queries SugarCRM using one or more input fields and pulls data from a matching record.

Supported modules

You can retrieve records from any standard or custom module, including:

- Contacts
- Leads
- Opportunities

- Accounts
- Custom modules

Query inputs

You can use multiple inputs to match a record. For example:

- Email address
- Record ID
- Custom field values

Field mapping

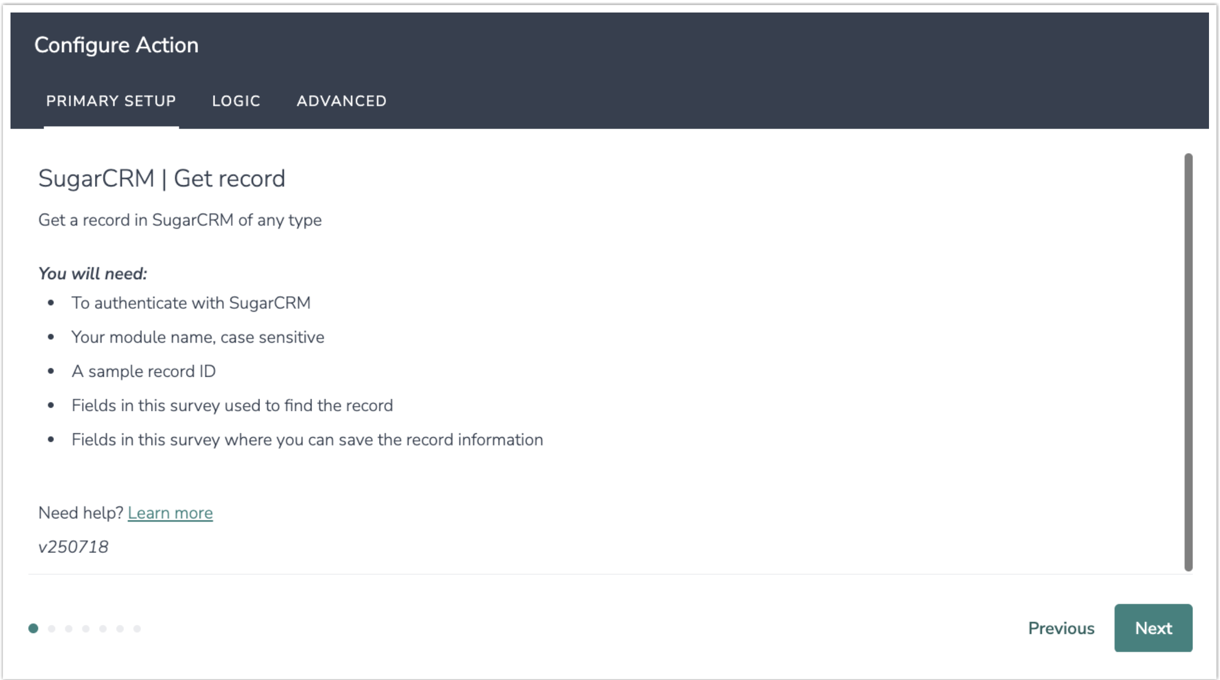
Once a record is found, you can map its fields to survey questions to prefill answers or use the data to power survey logic.

Set up the integration

1. 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



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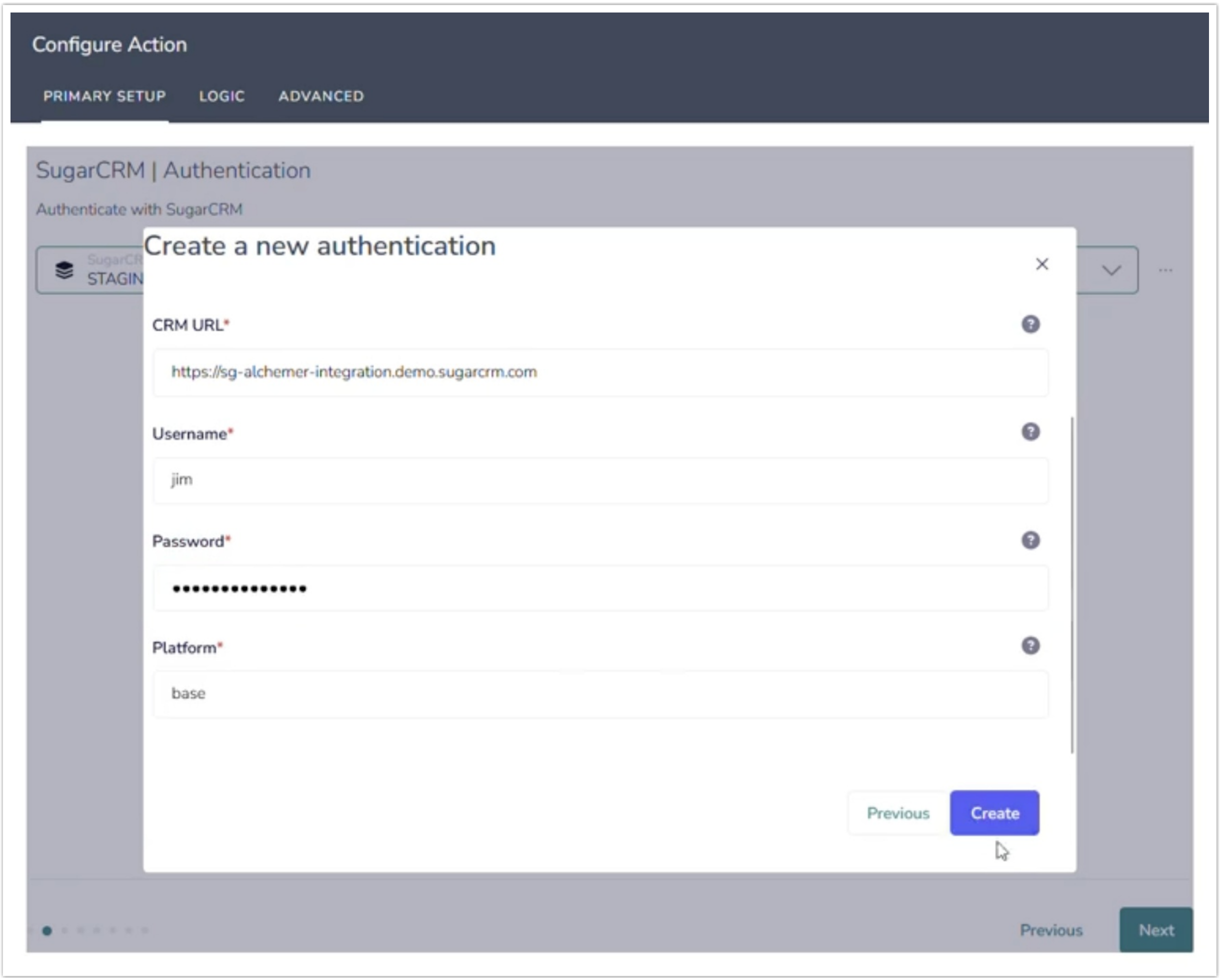
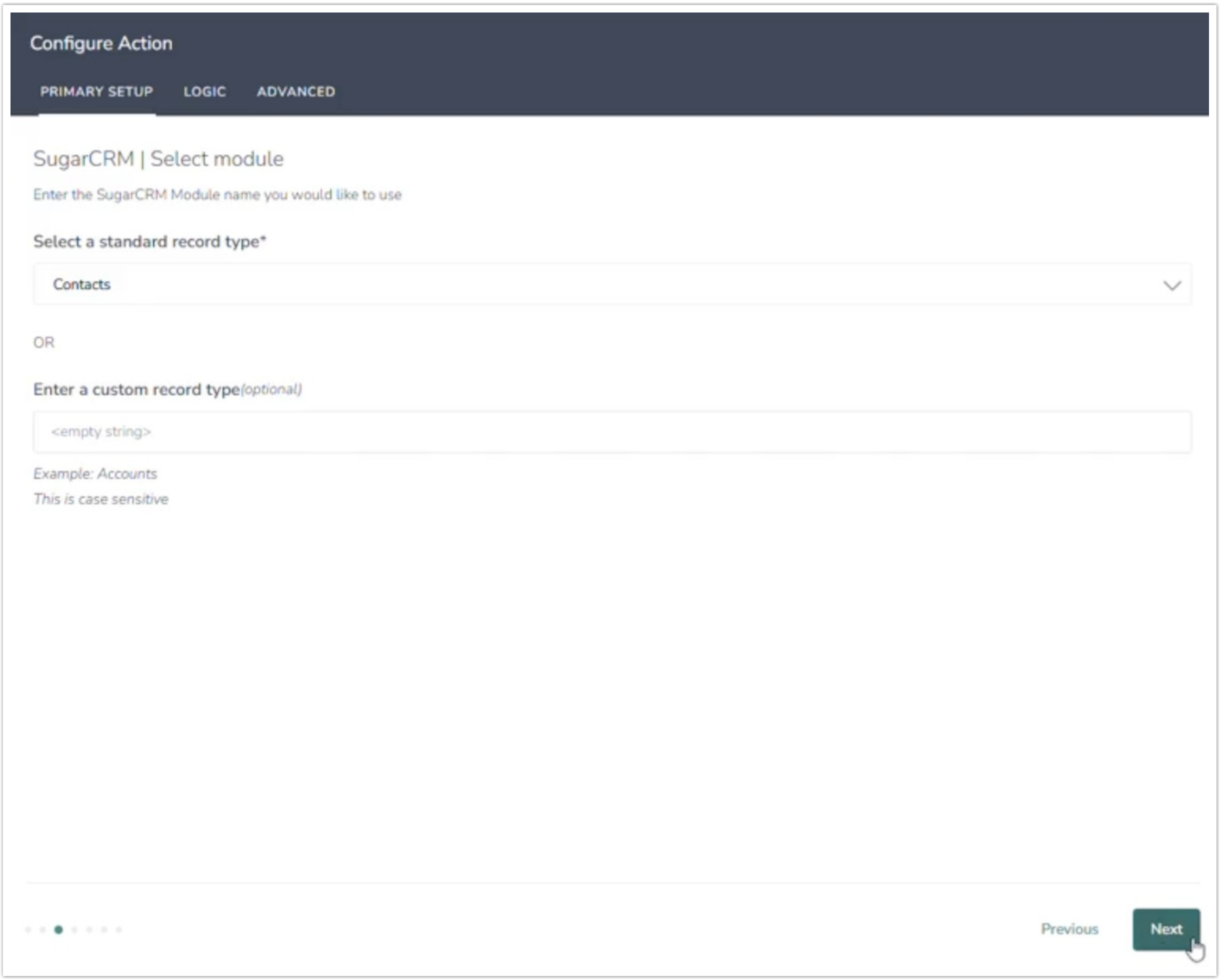
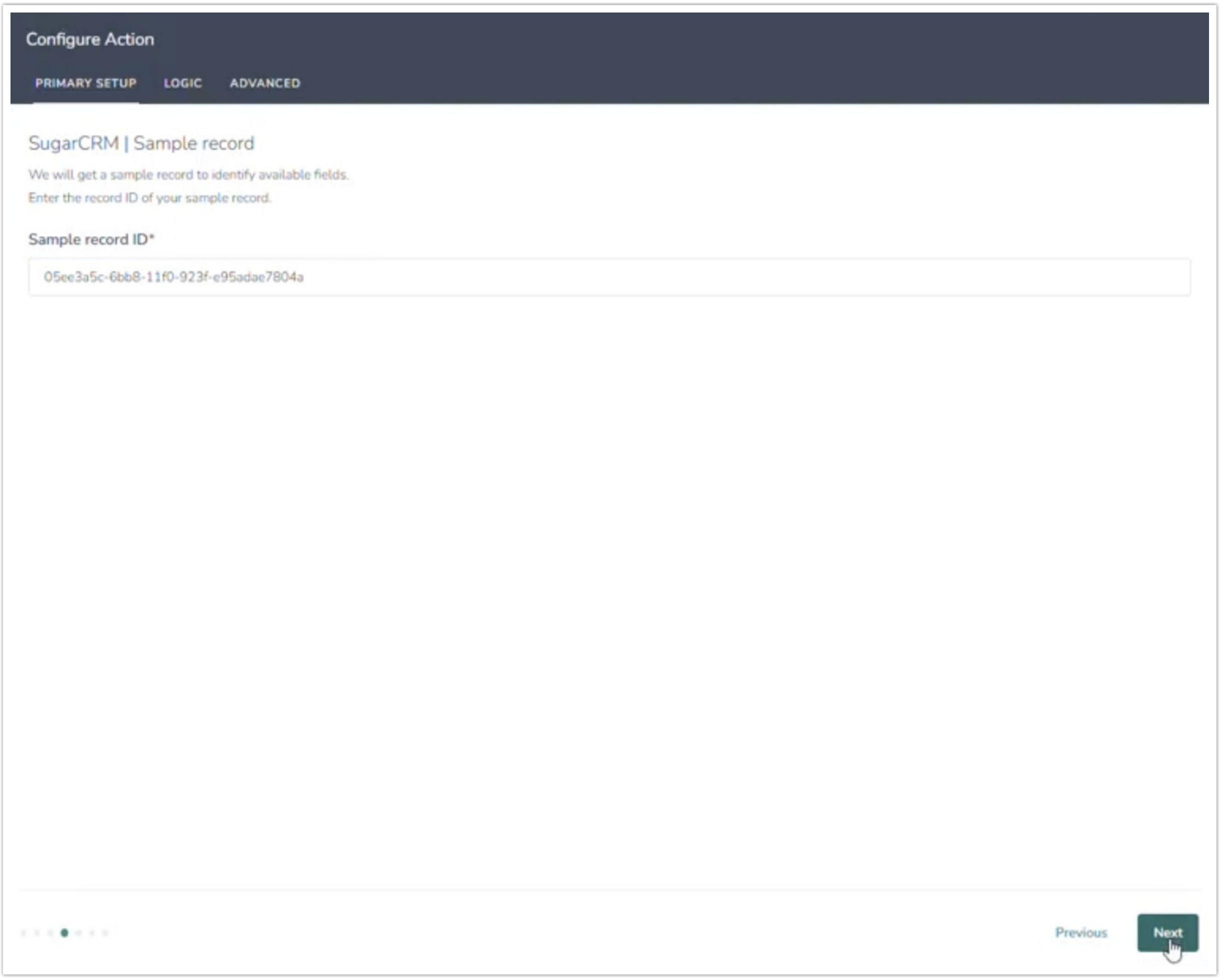


3. Select Module

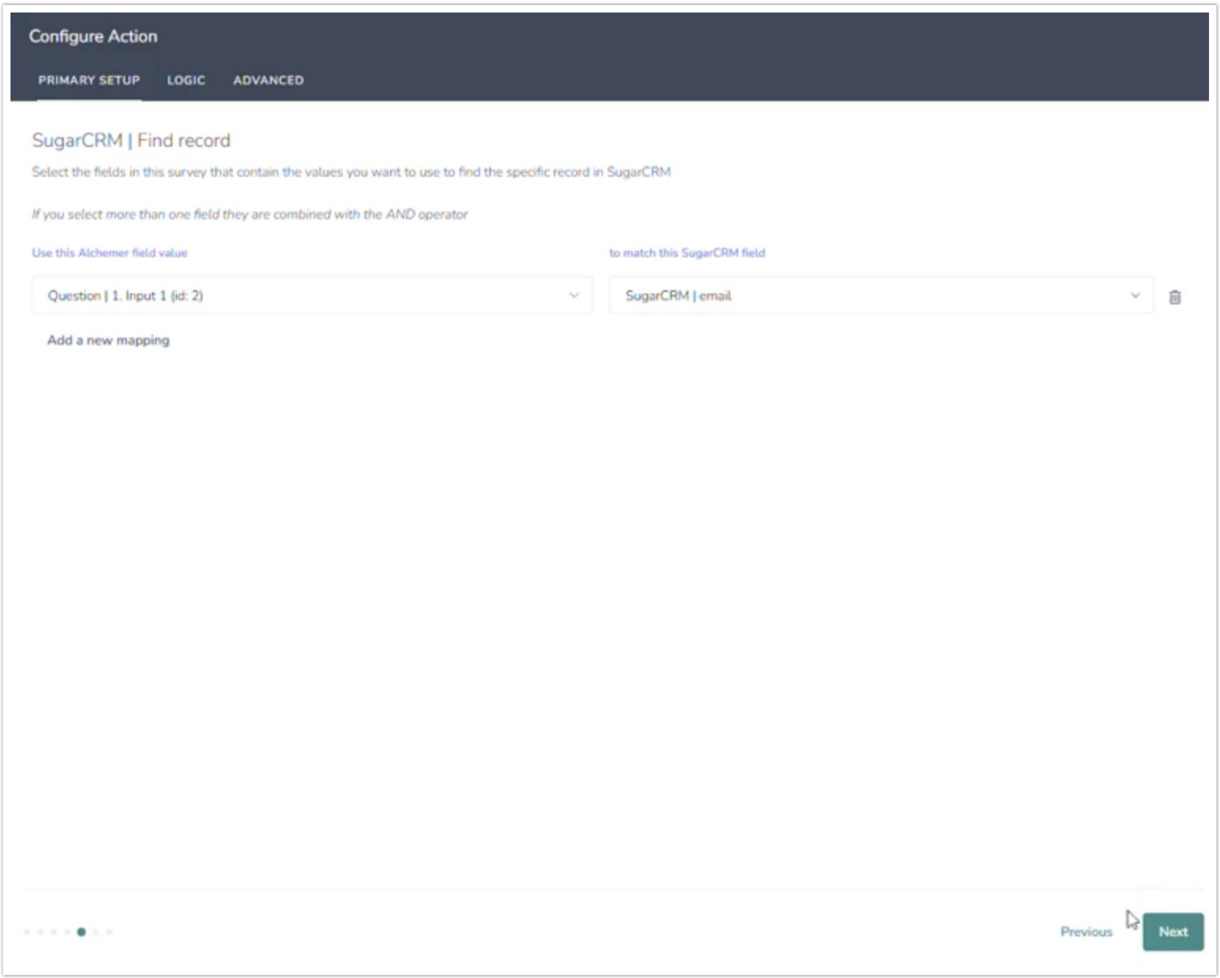
Enter the SugarCRM Module name you would like to use.


Configure Action
PRIMARY SETUP
LOGIC
ADVANCED
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
Previous
Next



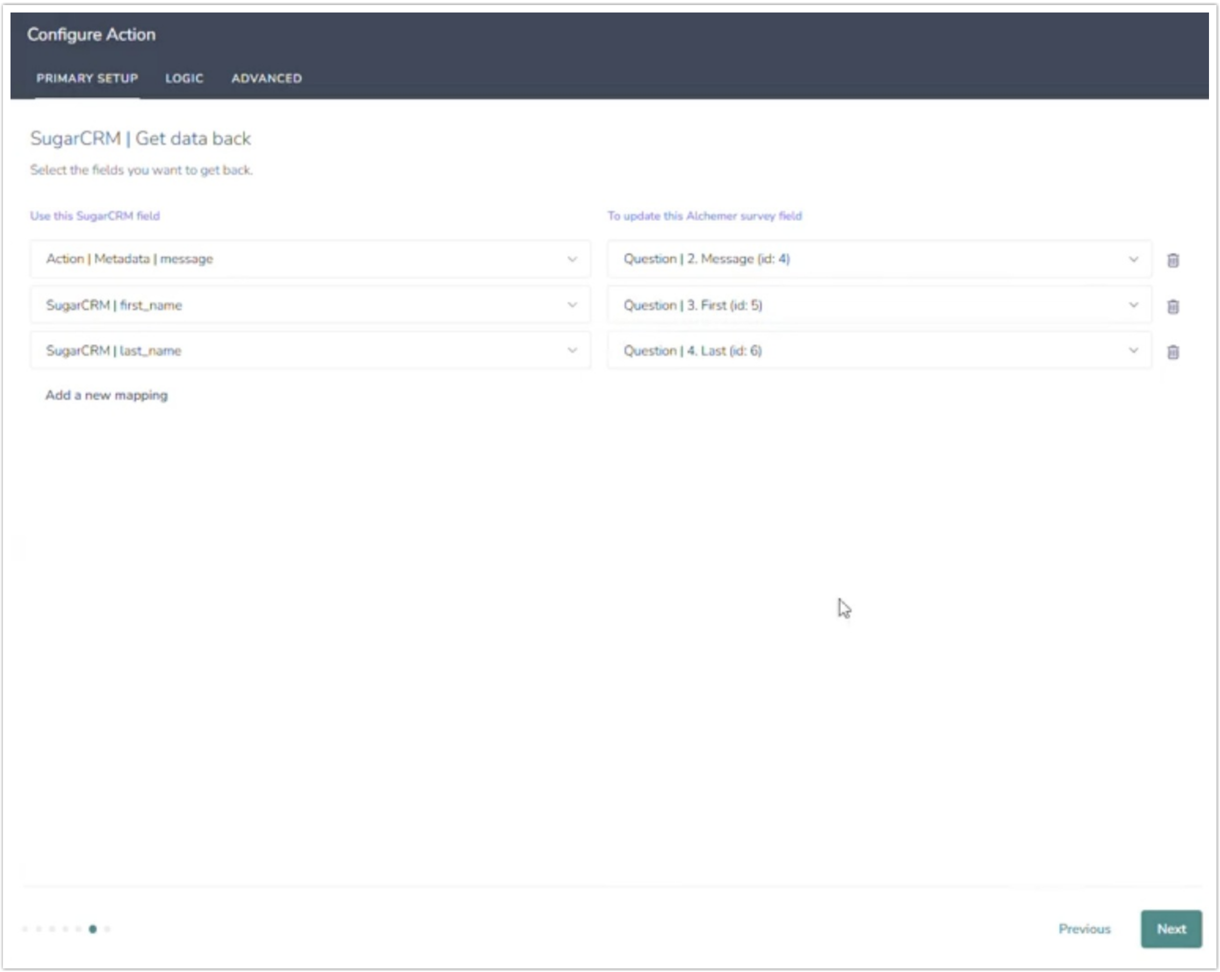
4. Find Record

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



6. Get data back

Select the fields you want to get back.



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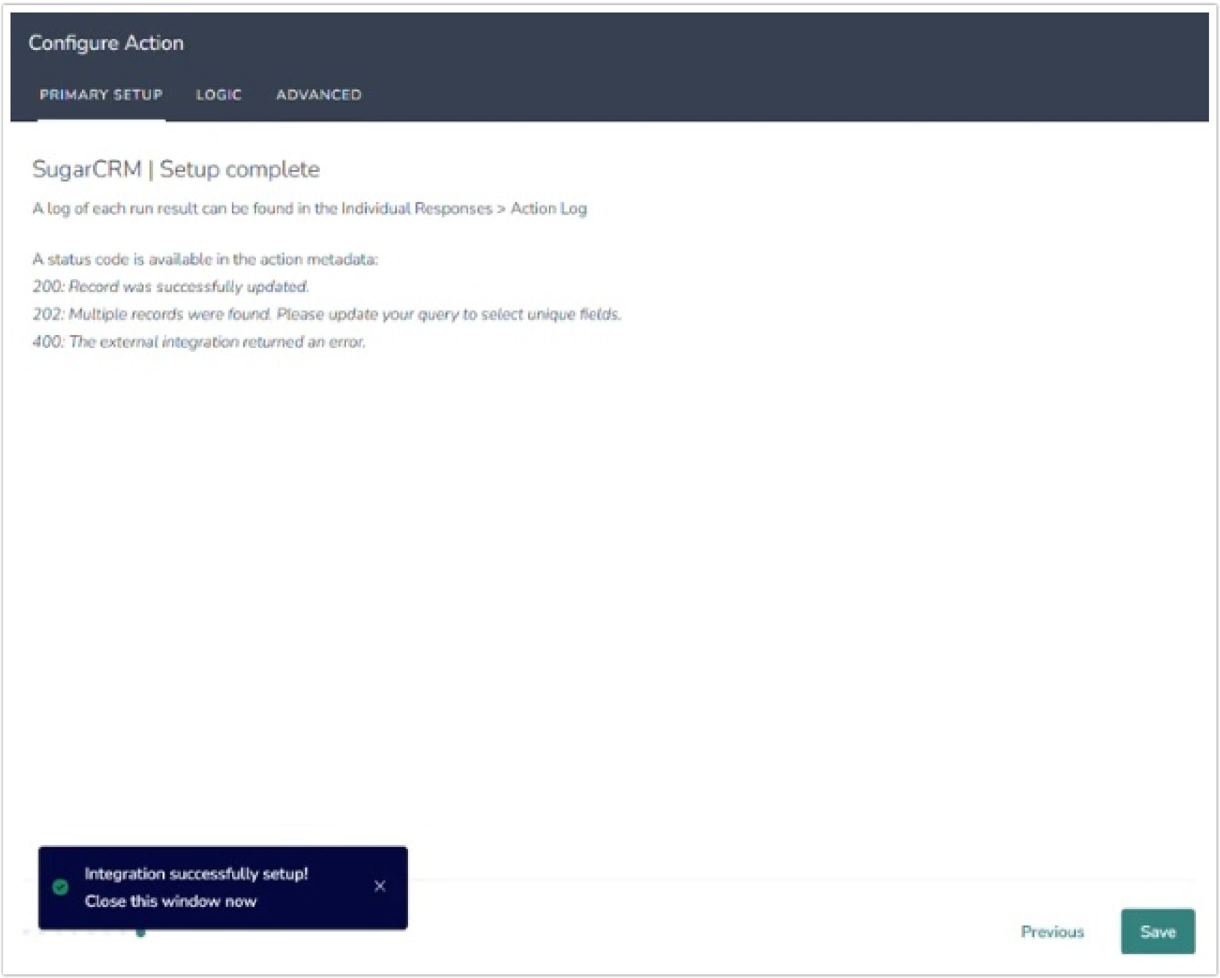
A log of each run result can be found in the Individual Responses > Action Log



Tips

- Ensure your query fields are specific enough to return a single record.
- Use retrieved data to display conditional content or skip logic.
- Combine with Create or Update Record actions to build powerful CRM workflows.

Related Articles