

SugarCRM Integration for Alchemer Workflow

The SugarCRM Integration for Alchemer Workflow is available for purchase as an add-on. If you are interested in purchasing, [please contact us for more information](#).

With the Alchemer SugarCRM integration, you can easily:

- Push workflow data from Alchemer into SugarCRM records
- Update SugarCRM fields automatically based on Alchemer survey responses or triggers
- Retrieve data from SugarCRM to personalize or segment workflows in Alchemer

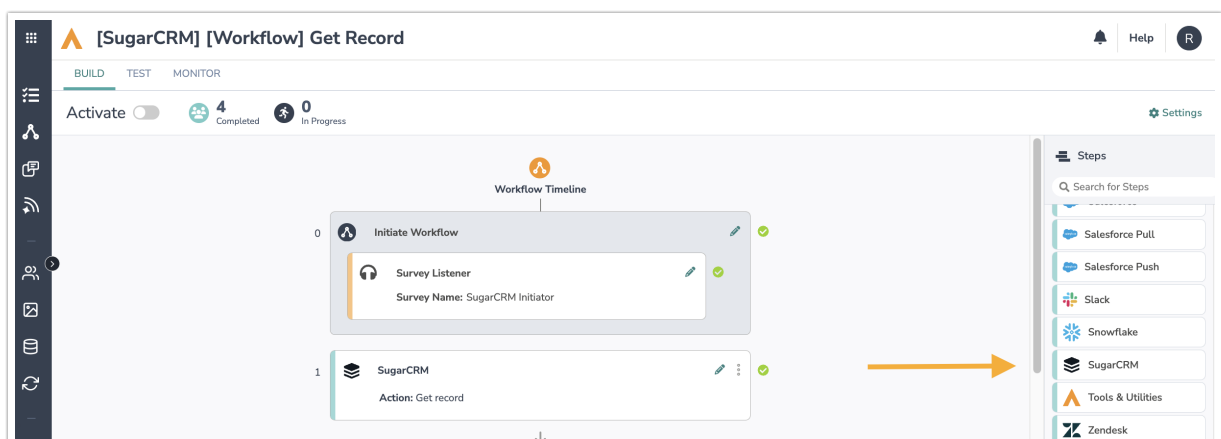
Adding a SugarCRM Step to your Workflow

1. Create a Workflow in Alchemer and select your initiator.

For more information on building Workflows in Alchemer refer to the following documentation:


- [Getting Started with Alchemer Workflow](#)
- [Building a Workflow](#)

2. When you are ready to add the SugarCRM step to your Workflow, drag the SugarCRM step from the Step Library under Connections.






3. Click the pencil icon to configure your Excel integration step.

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SugarCRM

Action: Get record



4. Select the action you would like to perform:

- SugarCRM: Create record. [Jump to section.](#)
- SugarCRM: Update record. [Jump to section.](#)
- SugarCRM: Get record. [Jump to section.](#)

Configure Integration

PRIMARY SETUP

[< Back](#)

Select Action

Select the action you would like to perform.

Excel | Get data from Excel
Get data from an Excel worksheet

Excel | Update data in Excel
Update an Excel worksheet

Excel | Push data to Excel
Push data to an Excel worksheet

Cancel

Next

SugarCRM | Get data to a record

You will need:

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

1. Select "Get record | Get a record from SugarCRM" as your action.

Configure Integration

PRIMARY SETUP

< Back

Select Action

Select the action you would like to perform.

Update record
Update a record in SugarCRM

Get record
Get a record from SugarCRM

Create record
Create a record in SugarCRM

Cancel

Next

2. Click "Next" on the integration overview screen.

Configure Integration

PRIMARY SETUP

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 workflow used to find the record

Need help? [Learn more](#)

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3. Authenticate with your SugarCRM account. Click add a new account. Once complete, return to the setup wizard in Alchemer.

Configure Integration

PRIMARY SETUP

SugarCRM | Authentication

Authenticate with SugarCRM

SugarCRM

PRODUC

Create a new authentication

Your authentication name

PRODUCTIONUS:C719797:T1036009's SugarCRM account 1

CRM URL*

https://sg-alchemer-integration.demo.sugarcrm.com

Username*

Alan

Password*

.....

Platform*

base

Previous

Create

Previous

Next

4. Enter the SugarCRM Module name you would like to use.

Edit Integration

PRIMARY SETUP

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)

test

Example: Accounts

This is case sensitive

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

Edit Integration

PRIMARY SETUP

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

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

Edit Integration

PRIMARY SETUP

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

Step 0 | Survey Listener Questions - SugarCRM Initiator | 1. In...

SugarCRM | email

Add a new mapping

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7. Setup complete | A log of each run can be found in the Monitor tab. Metadata about this action is also available as merge codes.

Edit Integration

PRIMARY SETUP

SugarCRM | Setup complete

A log of each run result can be found in the Monitor tab. Metadata about this action are also available as merge codes.

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

PreviousSave

SugarCRM | Update data in a record

You will need:

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

1. Select "Update record | Update a record in SugarCRM" as your action.

Configure Integration

PRIMARY SETUP

[← Back](#)

Select Action

Select the action you would like to perform.

Update record
Update a record in SugarCRM

Get record
Get a record from SugarCRM

Create record
Create a record in SugarCRM

[Cancel](#) [Next](#)

2. Click "Next" on the integration overview screen.

Edit Integration

PRIMARY SETUP

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 workflow used to find the record to update
- Fields in this workflow used to update the record information

Need help? [Learn more](#)

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3. Authenticate with your SugarCRM account. Click add a new account. Once complete, return to the setup wizard in Alchemer.

Edit Integration

PRIMARY SETUP

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)

test

Example: Accounts

This is case sensitive

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

Edit Integration

PRIMARY SETUP

SugarCRM | Sample record

We will get a sample record to identify available fields.

Enter the record ID of your sample record.

Sample record ID*

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PRIMARY SETUP

SugarCRM | Find record

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Use this Alchemer field value

to match this SugarCRM field

Step 0 | Survey Listener Questions - SugarCRM Initiator | 1. In...

SugarCRM | email

Add a new mapping

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

Edit Integration

PRIMARY SETUP

SugarCRM | Update record

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

Use this Alchemer field value

to update this SugarCRM field

Step 0 | Survey Listener Questions - SugarCRM Initiator | 2. U...

SugarCRM | last_name

Add a new mapping

Data prep options*

Strip HTML tags from inputs

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Next

8. Setup complete | A log of each run can be found in the Monitor tab. Metadata about this action is also available as merge codes.

Edit Integration

PRIMARY SETUP

SugarCRM | Setup complete

A log of each run result can be found in the Monitor tab. Metadata about this action are also available as merge codes.

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](#)

SugarCRM | Create a record in SugarCRM

You will need:

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

1. Select "Create record | Create a record in SugarCRM" as your action.

Configure Integration

PRIMARY SETUP

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Select Action

Select the action you would like to perform.

Update record

Update a record in SugarCRM

Get record

Get a record from SugarCRM

Create record

Create a record in SugarCRM

Cancel

Next

2. Click "Next" on the integration overview screen.

Edit Integration

PRIMARY SETUP

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 workflow used to find the record to update

Fields in this workflow used to update the record information

Need help? [Learn more](#)

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3. Authenticate with your SugarCRM account. Click add a new account. Once complete, return to

the setup wizard in Alchemer.

The screenshot shows the 'Configure Integration' setup wizard in Alchemer. The main header is 'Configure Integration' with a sub-header 'PRIMARY SETUP'. The current step is 'SugarCRM | Authentication', with the instruction 'Authenticate with SugarCRM'. A modal window titled 'Create a new authentication' is open, containing the following fields:

- Your authentication name:** PRODUCTIONUS:C719797:T1036009's SugarCRM account 1
- CRM URL*:** https://sg-alchemer-integration.demo.sugarcrm.com
- Username*:** Alan
- Password*:** (masked with dots)
- Platform*:** base

At the bottom of the modal are 'Previous' and 'Create' buttons. The main wizard has a progress indicator at the bottom with five dots, and 'Previous' and 'Next' buttons.

4. Enter the SugarCRM Module name you would like to use.

Edit Integration

PRIMARY SETUP

SugarCRM | Select module

Enter the SugarCRM Module name you would like to use

Select a standard record type*

Contacts

OR

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test

Example: Accounts

This is case sensitive

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Edit Integration

PRIMARY SETUP

SugarCRM | Sample record

We will get a sample record to identify available fields.

Enter the record ID of your sample record.

Sample record ID*

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Step 0 | Survey Listener Questions - SugarCRM Initiator | 1. In...

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Add a new mapping

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400: The external integration returned an error

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► This integration doesn't fit my use cases, or I want to provide feedback to the Alchemer Product Team!

Related Articles