

# 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

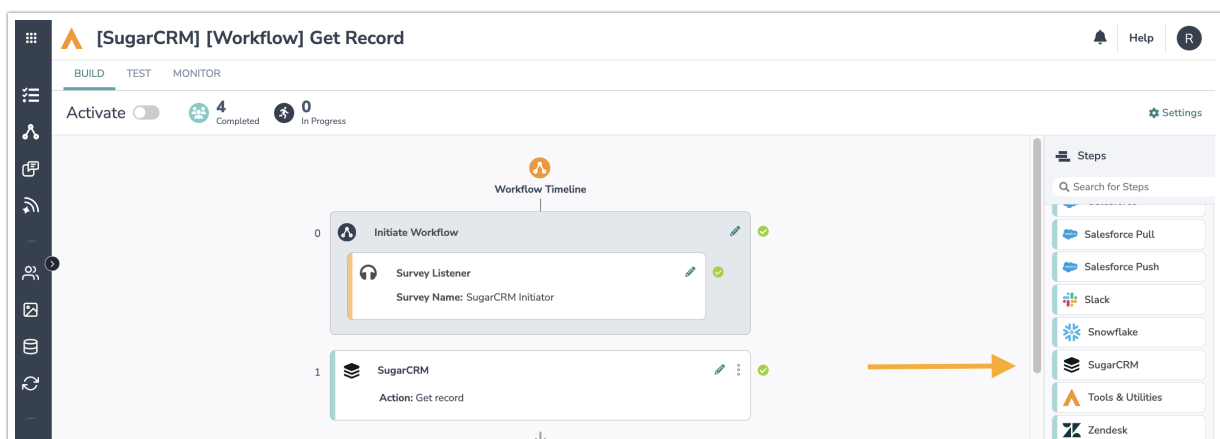
## Adding a SugarCRM Step to your Workflow

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.

1  **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

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#### 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

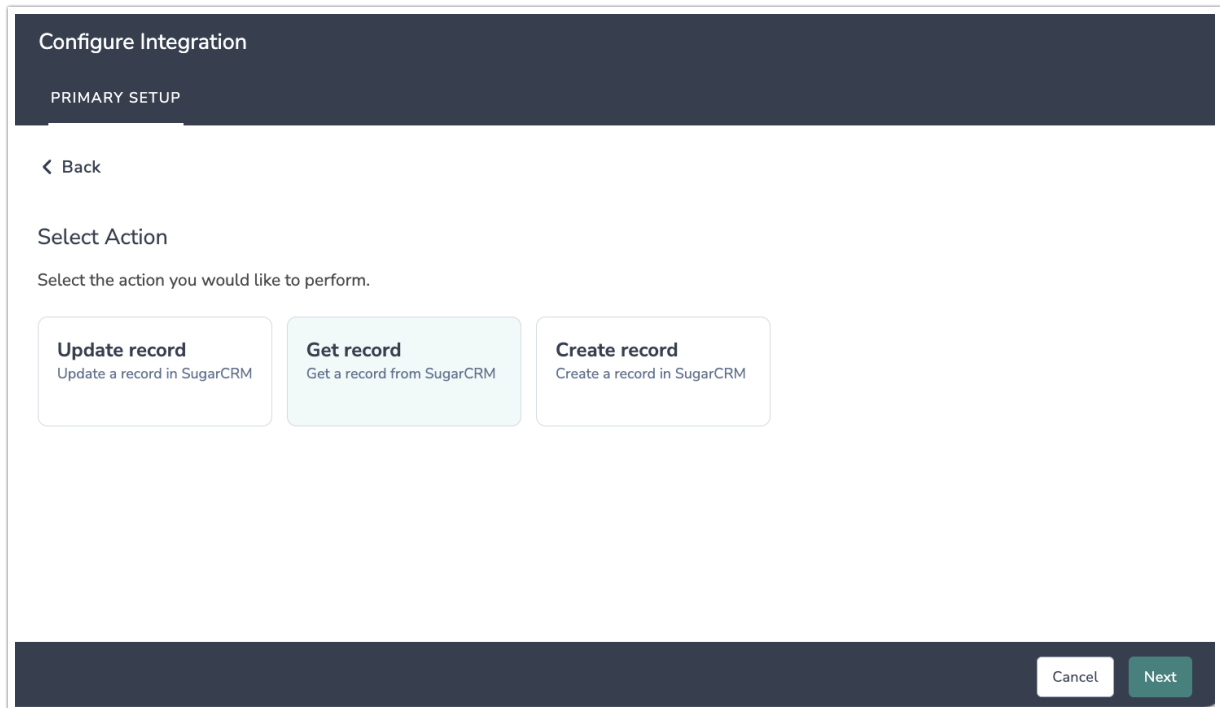
[Cancel](#) [Next](#)

## SugarCRM | Get data to a record

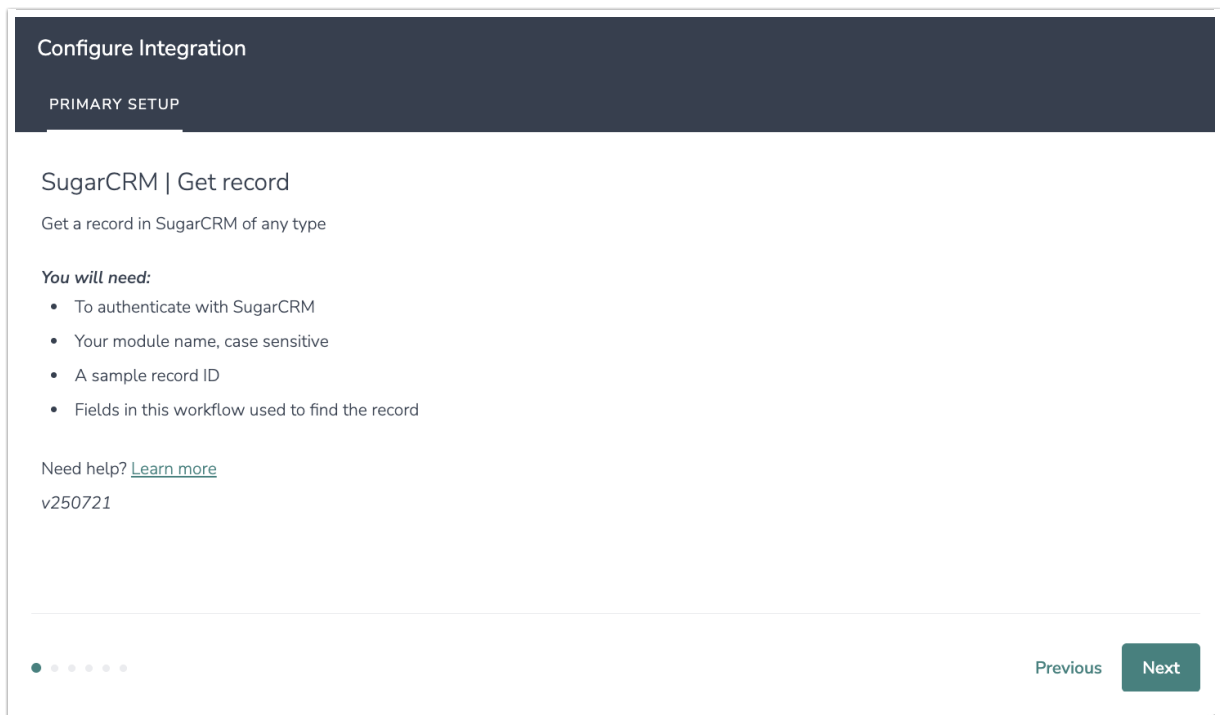
### *You will need:*

- 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.



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



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 PRODUCTION

### 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*

Previous Next

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

Previous Next

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

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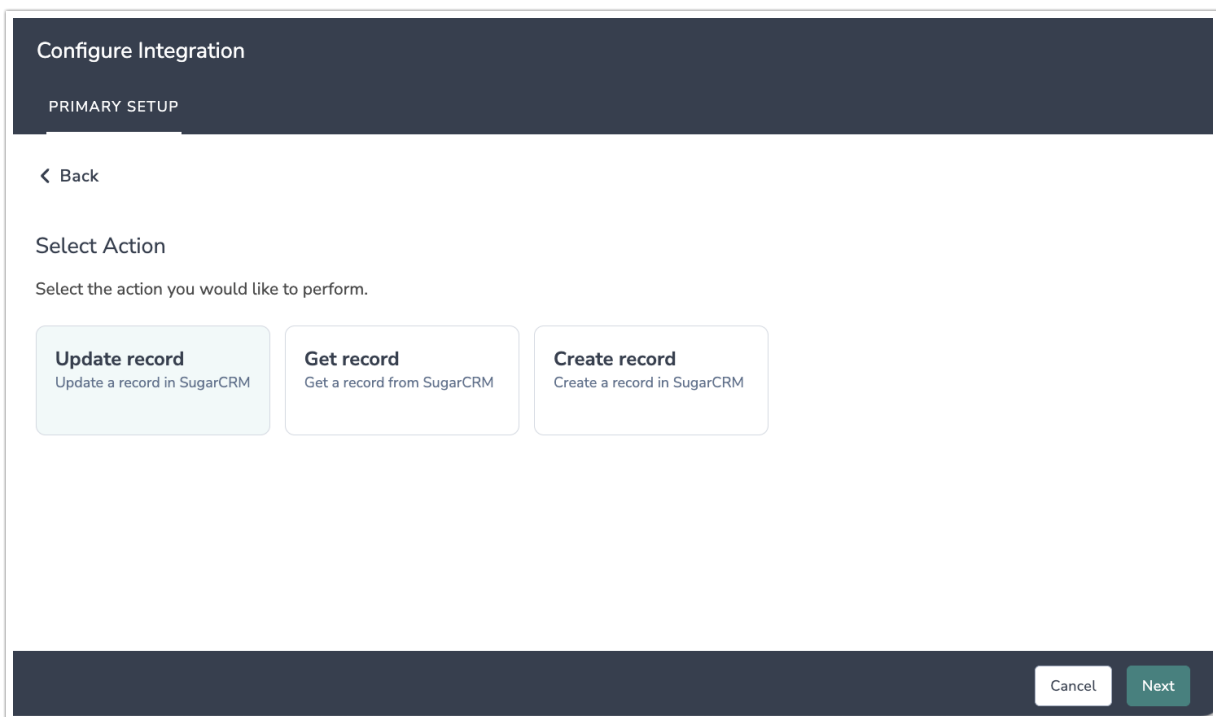
Previous Save

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.



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](#)

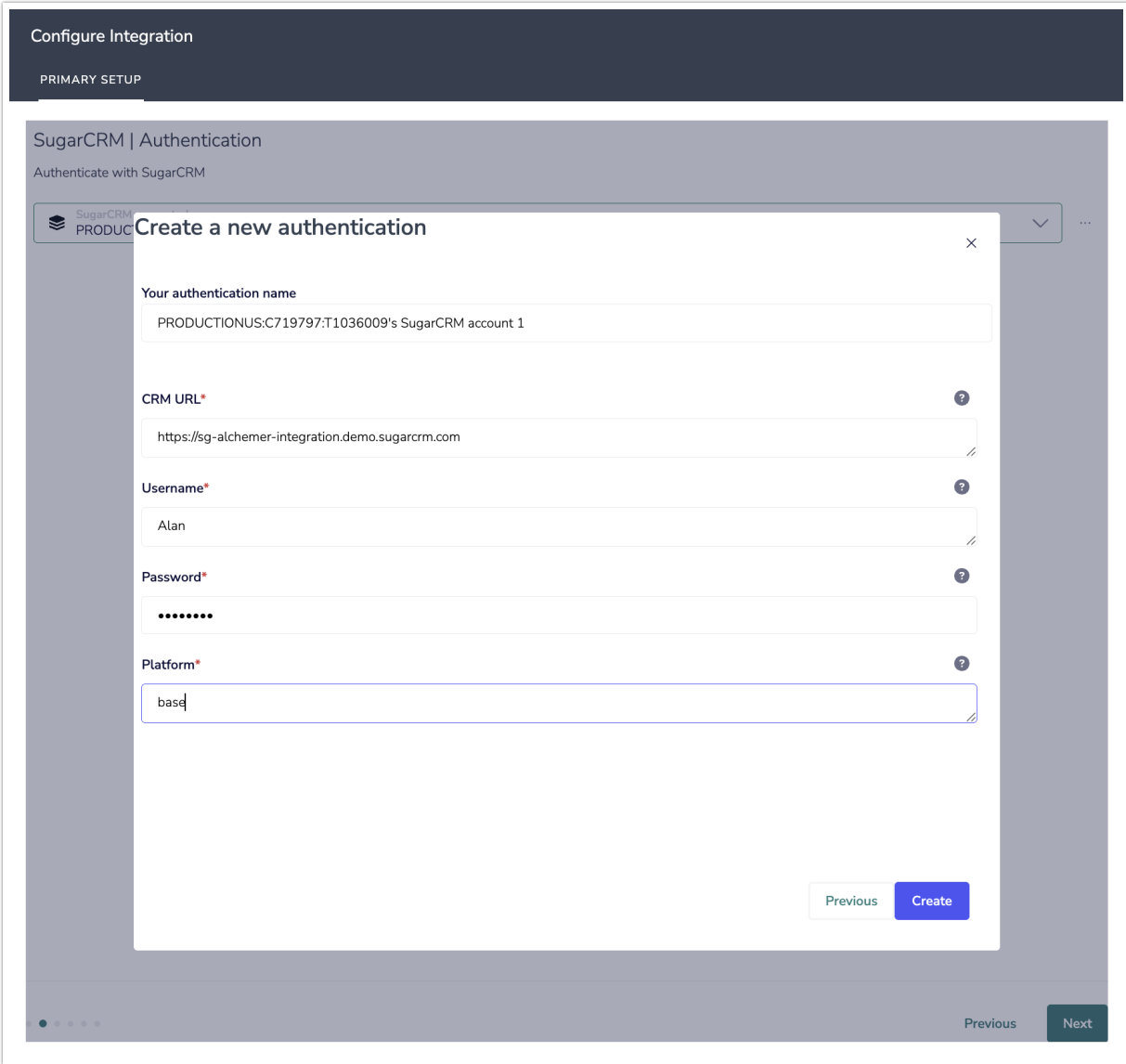
v250721



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



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*

Previous Next

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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Next

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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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

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Previous

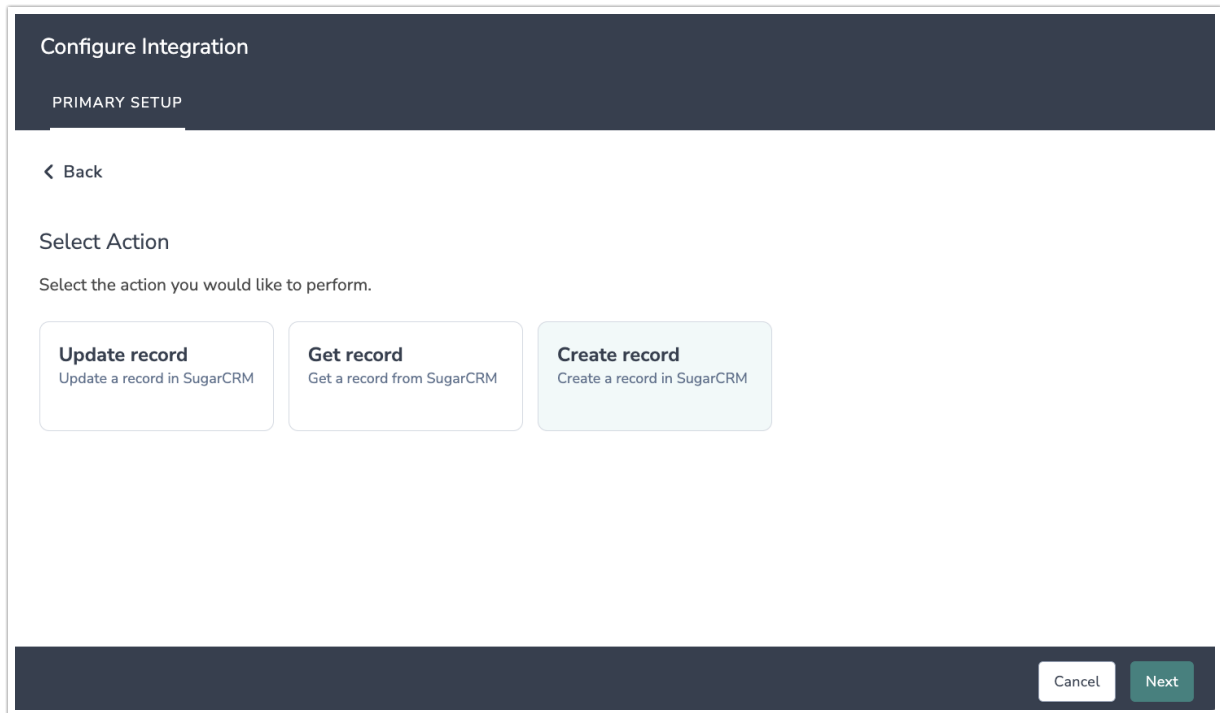
Save

## SugarCRM | Create a record in SugarCRM

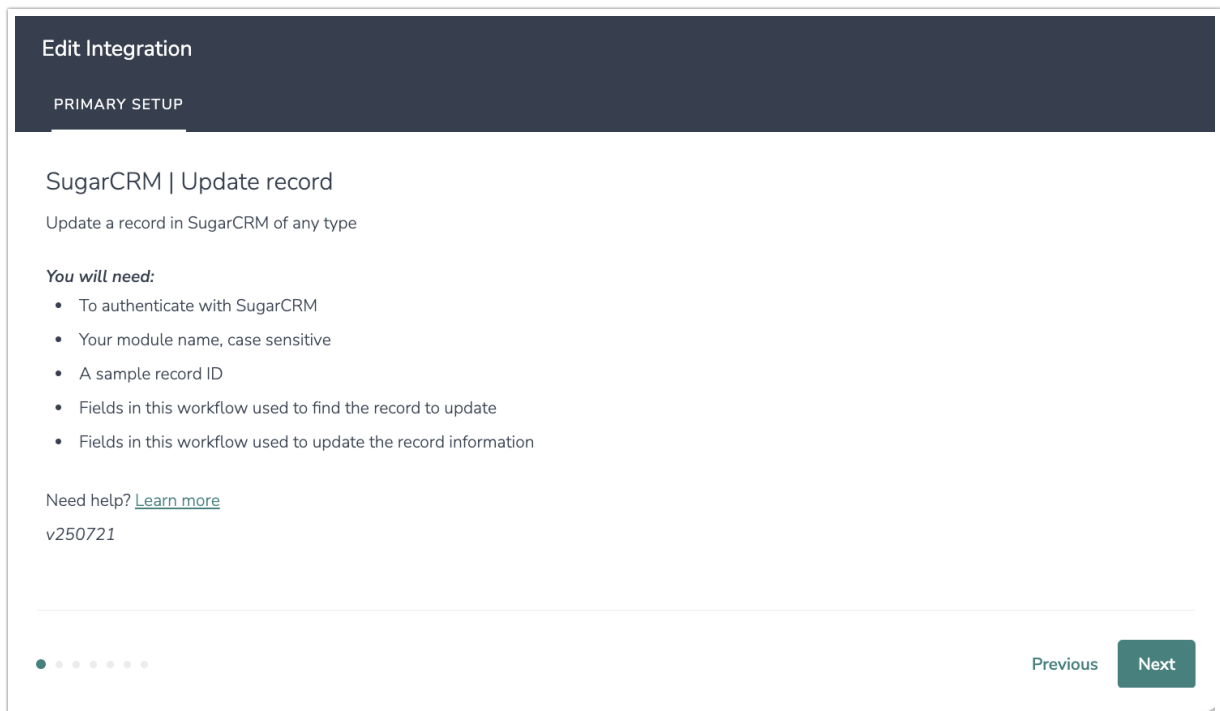
### *You will need:*

- 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.

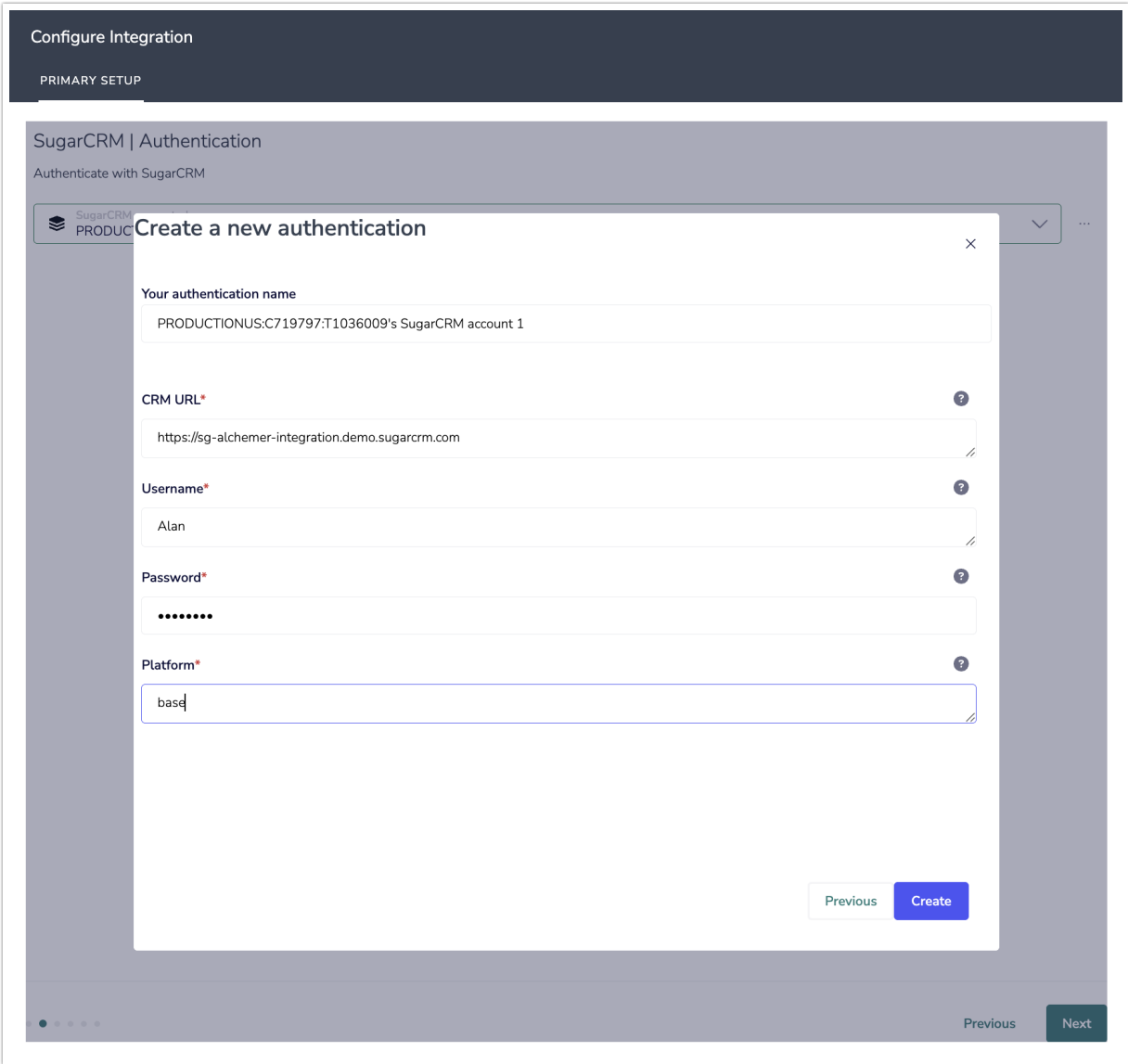


2. Click "Next" on the integration overview screen.



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

the setup wizard in Alchemer.



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

## Edit Integration

PRIMARY SETUP

### SugarCRM | Select module

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

SugarCRM | email v

🗑️

Add a new mapping

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

SugarCRM | last\_name v

🗑️

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**Data prep options\***

Strip HTML tags from inputs
v

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*400: The external integration returned an error*



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[Save](#)

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

## Related Articles