

## 2. Sugar CRM Integration User Guides

Thank you for purchasing our extension. If you have any questions that are beyond the scope of this document, do not hesitate to leave us an email via our email address below.

Created: 16/03/2016 | By: Magenest | Support Portal: <http://servicedesk.izysync.com/servicedesk/customer/portal/24>

- [Introduction](#)
  - [Features](#)
  - [System Requirements](#)
- [Configuration](#)
  - [Set Up Sugar Account](#)
  - [Set Up The Integration](#)
- [Data Integration Settings](#)
- [Main Functions](#)
- [Update](#)
- [Support](#)

### Introduction

**Magento 2 Sugar CRM Integration** is an extension developed by Magenest, which allows vendors to synchronize data between your Magento 2 site and Sugar CRM automatically.

#### Features

- Allows synchronizing and updating Customers from Magento 2 store into SugarCRM Leads, Accounts, Contacts, Opportunities.
- Allows synchronizing and updating Customers from Magento 2 store into SugarCRM Opportunities when an order Magento 2 created.
- Allows synchronizing and updating Customers's billing address book from Magento 2 store into SugarCRM Targets.
- Allows synchronizing Campaigns from Magento 2 store into SugarCRM Campaigns.
- Allows admins define the mapping fields in backend with ease.
- Mapping manually between Magento 2 attributes and SugarCRM custom fields.

#### System Requirements

Compatible with SugarCRM: 5.x, 6.x, 7.x.

Your store should be running on Magento 2 Community Edition version 2.0.0+.



### Configuration

#### Set Up Sugar Account


For this integration you will need to have a account in Sugar.

To do this go to <http://sugarcrm.izysync.com/> and login if you already have an account or sign up to create a new one.

You can also use our demo account to test:

Username: admin1234.

Password: admin1234.


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Welcome to

**SUGARCRM** COMMUNITY EDITION.

User Name:


Password:

[Log In](#)

[Forgot Password?](#)

Server response time: 0.25 seconds.


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powered by  


## Set Up The Integration

First, navigate to **Store > Magenest > SugarCRM Config > Setup**, then filling in information:

- **Username:** your SugarCRM username.
- **URL:** your\_SugarCRM\_site/service/v4\_1/rest.php.
- **Password:** your SugarCRM password.
- Turn on sync operations of your choice.



[Dashboard](#)
[Sales](#)
[Products](#)
[Customers](#)
[Marketing](#)
[Content](#)
[Reports](#)
[Stores](#)
[System](#)
[Find Partners & Extensions](#)

Store View: Default Config ?

Save Config

GENERAL
MAGENEST
SugarCRM Settings
CATALOG
CUSTOMERS
SALES
SERVICES
ADVANCED

SugarCRM Information
Synchronize

Username:  [GLOBAL]
URL:  [GLOBAL]  
E.g: http://sugarcrm.lzysync.com/service/v4\_1/rest.php(http:// is required!!!)
Password:  [GLOBAL]

Sync Account:  [GLOBAL]
Sync Contact:  [GLOBAL]
Sync Lead:  [GLOBAL]
Sync Campaign:  [GLOBAL]
Sync Opportunitie:  [GLOBAL]
Sync Prospect:  [GLOBAL]

When done, please press **Save Config**, your configuration is ready to use.

## Data Integration Settings

Click on **Customers > Field Mapping**. You can define field mappings between Magento 2 and SugarCRM easily.

The screenshot shows the SugarCRM interface for field mapping. The left sidebar has a menu with 'Field Mapping' highlighted. The main content area shows a table with 6 records found. The table has columns: Id, SugarCRM Field, Type, Description, Status, and Action. The first record is 'email1' mapped to 'Accounts' with description 'Email'. The 'Action' column for the first record has an 'Edit' link.

Id	SugarCRM Field	Type	Description	Status	Action
	email1	Accounts	Email	Enabled	<a href="#">Edit</a>
	date_entered	Accounts	Created At	Enabled	<a href="#">Edit</a>
	date_modified	Accounts	Updated At	Enabled	<a href="#">Edit</a>
	name	Accounts	First Name	Enabled	<a href="#">Edit</a>
	bill_address_street	Accounts	Billing Street	Enabled	<a href="#">Edit</a>
	bill_address_city	Accounts	Billing City	Enabled	<a href="#">Edit</a>
	bill_address_country	Accounts	Billing Country	Enabled	<a href="#">Edit</a>
	bill_address_state	Accounts	Billing State/Province	Enabled	<a href="#">Edit</a>
	bill_address_postalcode	Accounts	Billing Zip/Postal Code	Enabled	<a href="#">Edit</a>

Click button **Edit**, if you want to conduct any changes.

This screenshot is identical to the previous one, but the 'Edit' link in the 'Action' column of the first row is circled in red to highlight it.

To add a new mapping, click on **Add New Mapping** button, Add New Mapping page will show up

- **Type:** Choose table you want to map.
- **Magento Field:** Choose Magento Field.
- **Sugar Field:** Choose corresponding SugarCRM Field.
- **Description:** Describe your mapping.
- **Status:** Enabled/Disabled.

DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

FIND PARTNERS & EXTENSIONS

## New Mapping

← Back

Reset

Update All Fields

Save and Continue Edit

Save Mapping

### Mapping Details

Type \*

Contacts

Magento Field \*

Date of Birth

Sugar Field \*

Assigned to:(assigned\_user\_name)

Description

Status \*

Enabled

Please press button **Save Mapping**, your mapping is ready for the next sync.

## Main Functions

- When a new account is registered in Magento 2, SugarCRM will automatically add a new record of this account in **Leads**.

Default welcome msg! Sign in or Create an Account

LUMA

Search entire store here...

## Create New Customer Account

Personal Information

First Name \*

Test Synchronize with SugarCRM

Last Name \*

Magento2

Email \*

magento@magenest.com

☐ Sign Up for Newsletter

Sign-in Information

Password \*

\*\*\*\*\*

Confirm Password \*

\*\*\*\*\*

Create an Account

Welcome, [Administrator](#) | [Log Out](#) | [Employees](#) | [Admin](#) | [Support](#) | [About](#)

[Home](#) | [Accounts](#) | [Contacts](#) | [Opportunities](#) | [Leads](#)

[Recently Viewed:](#)
 Oliver Queen |
 dfgdsugar df... |
 Potential |
 Administrator

[Actions:](#)
 Create Lead |
 Create Lead From vCard |
 View Leads |
 Import Leads

Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).

### Search Leads

☐ My Items
☐ Open Items

[Advanced Search](#)

<input type="checkbox"/>	Name	Status	Account Name	Office Phone	Email	User	Date Created
<input type="checkbox"/>	<a href="#">Test Synchronize with SugarCRM Magento2</a>	New			<a href="#">magento@magenest.com</a>	-	03/16/2016 12:28am
<input type="checkbox"/>	<a href="#">Stacy Ickes</a>	In Process	SuperG Tech	(718) 864-3865	<a href="#">sugar.support@example.edu</a>	<a href="#">Max Jensen</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Barrett Ismail</a>	In Process	Underwater Mining Inc.	(416) 890-3309	<a href="#">dev.qa.phone@example.org</a>	<a href="#">Willi Westin</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Joan Dubin</a>	Dead	Rhyme & Reason Inc	(513) 067-3567	<a href="#">support16@example.biz</a>	<a href="#">Max Jensen</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Everett Mukai</a>	In Process	Davenport Investing	(958) 943-5369	<a href="#">section85@example.us</a>	<a href="#">Sarah Smith</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Woodrow Bury</a>	Assigned	B.H. Edwards Inc	(783) 285-4330	<a href="#">sales.beans.kid@example.us</a>	<a href="#">Chris Oliver</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Hans Heisler</a>	New	Cumberland Trails Inc	(343) 091-1243	<a href="#">vegan.info@example.edu</a>	<a href="#">Sarah Smith</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Marion Rouillard</a>	Converted	Kings Royalty Trust	(354) 171-7026	<a href="#">qa.section.kid@example.co.jp</a>	<a href="#">Sally Bronsen</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Nelda Hine</a>	Recycled	Airline Maintenance Co	(440) 615-7885	<a href="#">hr.beans@example.co.jp</a>	<a href="#">Willi Westin</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Elena Aguirre</a>	In Process	24/7 Couriers	(789) 147-2902	<a href="#">the.qa@example.de</a>	<a href="#">Sarah Smith</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Burt McGriff</a>	Recycled	B.C. Investing International	(231) 064-0472	<a href="#">the91@example.com</a>	<a href="#">Sarah Smith</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Alyce Weikel</a>	New	P Piper & Sons	(592) 215-6852	<a href="#">section.section@example.co.jp</a>	<a href="#">Chris Oliver</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Melva Klein</a>	New	Tri-State Medical Corp	(963) 678-4253	<a href="#">im.info@example.us</a>	<a href="#">Max Jensen</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Ursula Enders</a>	Dead	24/7 Couriers	(219) 779-8547	<a href="#">vegan.qa@example.de</a>	<a href="#">Sally Bronsen</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Orlando Mills</a>	Recycled	Smallville Resources Inc	(662) 511-5261	<a href="#">sales61@example.cn</a>	<a href="#">Chris Oliver</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Myron Pinion</a>	New	Chandler Logistics Inc	(555) 311-0932	<a href="#">sales54@example.co.uk</a>	<a href="#">Sally Bronsen</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Norbert Brunelle</a>	In Process	Super Star Holdings Inc	(692) 985-0835	<a href="#">phone.im@example.edu</a>	<a href="#">Sally Bronsen</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Jeanie Crisler</a>	Dead	Q3 ARVRO III PR	(455) 390-6109	<a href="#">vegan52@example.biz</a>	<a href="#">Chris Oliver</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Sophie Fraga</a>	In Process	24/7 Couriers	(951) 664-9193	<a href="#">the.support@example.bw</a>	<a href="#">Sally Bronsen</a>	03/13/2016 08:06pm
<input type="checkbox"/>	<a href="#">Marta Ray</a>	Recycled	Powell Funding	(943) 591-4380	<a href="#">sugar.im.kid@example.name</a>	<a href="#">Sally Bronsen</a>	03/13/2016 08:06pm

[Print](#) | [Back to top](#)

- When a customer adds products to their cart then check out, this information account will be synced automatically in **Opportunities** of SugarCRM.

Welcome, SugarCRM Buy Product! | [SugarCRM Buy Product](#)

### Category

Your order number is: **000000016**.

We'll email you an order confirmation with details and tracking info.

Continue Shopping

[Privacy and Cookie Policy](#) |
[Search Terms](#) |
[Contact Us](#) |
[Advanced Search](#)

Subscribe

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- When a customer updates their data at **Address Book**, this information account will be synced automatically in **Targets** of SugarCRM.

Default welcome msg!

Account Dashboard
Account Information
**Address Book**
My Downloadable Products
My Orders
Newsletter Subscriptions
Billing Agreements
My Product Reviews
My Wish List

### Add New Address

Contact Information

First Name \*

Last Name \*

Company

Phone Number \*

Fax

Address

Street Address \*

City \*

State/Province

Zip/Postal Code \*

Country \*

Compare Products

You have no items to compare.

My Wish List

You have no items in your wish list.

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[Sales](#) | [Marketing](#) | [Support](#) | [Activities](#) | [Collaboration](#) | [All](#)

Recently Viewed:
 Oliver Queen
 Potential
 Administrator

Actions:

Note: To send record assignment notifications, an SMTP server must be configured in [Email Settings](#).

### Search Targets

[Advanced Search](#)

Name	Title	Email	Phone	Date Created
<input checked="" type="checkbox"/> <a href="#">Test Synchronize with SugarCRM Magento2</a>		magento@magenest.com	09898989898	03/16/2016 12:28am

Server response time: 0.32 seconds.

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- After the customer creates a new account successfully. If they conduct to update or edit their information account, this data will be synced automatically in **Accounts** of SuagarCRM.

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[Home](#) | [Accounts](#) | [Contacts](#) | [Opportunities](#) | [Leads](#)

Recently Viewed: Magenest | SugarCRM Buy... | Huan SetCookie | Huan SetCook... | Mr. Huan Huan | Eki kara Cao... | Test Sync Ca...

Actions: Create Account | View Accounts | Import Accounts

### Search Accounts

[Create](#)

Name  My Items ☐ [Search](#) [Clear](#) [Advanced Search](#) ?

☐ Delete

Name	City	Billing Country	Phone	User	Email Address	Date Created
<input type="checkbox"/> Magenest			0366875693	Administrator	hung@gmail.com	19/02/2016 09:06

☐ Delete

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- When admin creates **Campaigns** in Magento 2, the data of these **Campaigns** will be synced in SugarCRM.

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[Sales](#) | [Marketing](#) | [Support](#) | [Activities](#) | [Collaboration](#) | [All](#)

[Home](#) | [Accounts](#) | [Contacts](#) | [Leads](#) | [Campaigns](#) | [Targets](#) | [Target Lists](#)

Recently Viewed: Huan SetCookie | Huan SetCook... | Mr. Huan Huan | Magenest | Eki kara Cao... | Mr. Trong Hu... | Test Account2 | Test Sync Ca... | Test Account... | Canh An CHim

Actions: Create Campaign (Wizard) | Create Campaign (Classic) | View Campaigns | View Newsletters | Create Email Template | View Email Templates | Set Up Email | View Diagnostics | Create Lead Form

### Search Campaigns

[Create](#)

Name  My Items ☐ [Search](#) [Clear](#) [Advanced Search](#) ?

☐ Delete

Campaign	Status	Type	End Date	User	Date Created
<input type="checkbox"/> Test Sync Campaign with SugarCRM	1		16/03/2016	-	07/03/2016 14:52

☐ Delete

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- When admin or the customer edits any data about the information account in Magento 2, this data will also be changed and updated automatically in **Leads, Contacts, Accounts, Opportunities, Campaigns** and **Targets** of SugarCRM.
- 

## Update

- When a new update is available, we will provide you with a new package containing our updated extension.
  - You will have to delete the module directory and repeat the installing steps above.
  - Flush the config cache. Your store and newly installed module should be working as expected.
- 

## Support

- We will reply to support requests after **2 business days**.
  - We will offer **lifetime free update and 6 months free support for all of our paid products**. Support includes answering questions related to our products, bug/error fixing to make sure our products fit well in your site exactly like our demo.
  - Support **DOES NOT** include other series such as customizing our products, installation and uninstallation service.
- 

Once again, thank you for purchasing our extension. If you have any questions relating to this extension, please do not hesitate to contact us for support.