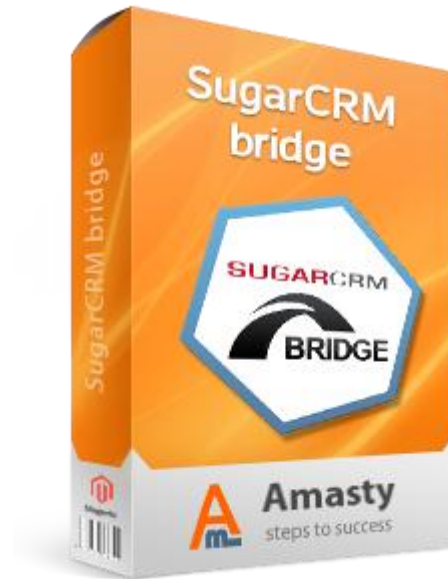


SugarCRM Bridge



Magento Extension User Guide

Official extension page: [SugarCRM Bridge](#)



User Guide: [SugarCRM Bridge](#)

Support: <http://amasty.com/contacts/>

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SugarCRM System

Once you've set up the required data, click the button to test the connection.

Connection Settings Test connection Save settings

SugarCRM SOAP connection settings

SugarCRM SOAP Location *	<input type="text" value="http://www.example.com/sugarcrm/soap.php"/>	Specify the API address to connect with SugarCRM server.
Use WSDL?	<input type="checkbox"/>	If you don't know how to fill the fields: "Use WSDL", "Target Namespace", "Use" and "Style", simply retain the default field meanings.
Target Namespace	<input type="text"/>	
Use	<input checked="" type="radio"/> Encoded <input type="radio"/> Literal	
Style	<input checked="" type="radio"/> RPC <input type="radio"/> Document	
SugarCRM username *	<input type="text"/>	
SugarCRM password	<input type="text"/>	

Write your SugarCRM name and password .



User Operations

Please, don't forget to save the settings.

 Save

Which operations need to be processed

Accounts

- | | |
|--------|---|
| Insert | <input checked="" type="radio"/> Disable <input type="radio"/> Enable |
| Update | <input checked="" type="radio"/> Disable <input type="radio"/> Enable |
| Delete | <input checked="" type="radio"/> Disable <input type="radio"/> Enable |

Contacts

- | | |
|--------|---|
| Insert | <input type="radio"/> Disable <input checked="" type="radio"/> Enable |
| Update | <input type="radio"/> Disable <input checked="" type="radio"/> Enable |
| Delete | <input type="radio"/> Disable <input checked="" type="radio"/> Enable |

You can see a number of operations, which will be performed during synchronization process. Enable the required ones.

Leads

- | | |
|--------|---|
| Insert | <input type="radio"/> Disable <input checked="" type="radio"/> Enable |
| Update | <input type="radio"/> Disable <input checked="" type="radio"/> Enable |
| Delete | <input type="radio"/> Disable <input checked="" type="radio"/> Enable |



User Operations

There are two ways to implement synchronization. First, in case you want to activate synchronization between Magento orders and SugarCRM Opportunity (Cases), you should click “Yes” radio button in “Enabled” field. Then select SugarCRM module, where all the Magento orders will be sent. The second way is to indicate “Sugar CRM Account” that will be connected with the “Opportunities (Cases)”.

Save

Once you’ve specified all the fields, click “Save” button.

User orders

Enabled

No Yes

User orders to SugarCRM

Opportunities

SugarCRM Account

Use customer account id for created order

Stage Mapping

+ Add

Magento

SugarCRM

Waiting for checkout

Prospecting

Remove

Magento

SugarCRM

Complete

Closed Won

Remove

In “Stage Mapping” tab you need to select the Magento Orders Stages similar to SugarCRM Opportunity (Cases) Stages.



3. Field mapping creation

The screenshot shows the Magento Admin Panel interface. At the top, there is a navigation bar with the following items: Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, CMS, **SugarCRM** (highlighted with a red circle), Reports, System, and Get help for. A dropdown menu is open under SugarCRM, showing options: Connection Settings, User Operations, Mapping, SugarCRM Contacts (highlighted with a red circle), and SugarCRM Leads. Below the navigation bar, a green notification box states: "The user operations settings have been saved." Underneath, there is a "User Operations" section. In the main content area, there is a "Manage Fields Mapping" section with a red box around the title. To the right of this section is an "Add Fields Mapping" button with a plus icon. Below this is a table with the following columns: SugarCRM Field Label, SugarCRM Field Name, SugarCRM Field Type, SugarCRM Field Options, Magento Customer Field Label, add new, and Code. The table content is empty, displaying "No records found." A red dashed arrow points from the "Add Fields Mapping" button to the table area.

If you want to create a new mapping, look for **SugarCRM ->SugarCRM Contacts** in menu bar and click "Add Fields Mapping".



3. Field mapping creation

SugarCRM Fields Mapping

SugarCRM Field *	First Name (first_name)
Select fields mapping type	Assistant Phone (assistant_phone)
Magento Customer Field	Birthdate (birthdate)
PHP code	Campaign (campaign_name)
	Campaign ID (campaign_id)
	Created By Id (created_by)
	Created By Id (created_by_name)
	Date Created (date_entered)
	Date Modified (date_modified)
	Deleted (deleted)
	Department (department)
	Description (description)
	Do Not Call (do_not_call)
	Email Address (email1)
	Fax (phone_fax)
	First Name (first_name)
	Home (phone_home)
	Last Name (last_name)
	Lead Source (lead_source)

You will see New Item Field. You have to create a connection between the following fields: "SugarCRM Contacts First Name" and "Magento Customer First Name". Select First Name in "SugarCRM" and "Magento Customer Field".

Then create connection between SugarCRM Contacts Last Name (Email Address) field and Magento Customer Last Name (Email Address) field. Please, add a new mapping and follow the same directions like above.

SugarCRM Fields Mapping

SugarCRM Field *	First Name (first_name)
Select fields mapping type	<input checked="" type="radio"/> Magento Customer Field <input type="radio"/> PHP code
Magento Customer Field	First Name

Save



New Item Field Back Save Mapping

SugarCRM Fields Mapping

SugarCRM Field *

Select fields mapping type PHP code

Magento Customer Field

PHP code

Note! Data inserted into “SugarCRM Contact Description” will be defined by “PHP code”. In “SugarCRM Field” select Description. In order to select fields mapping type, simply click the “PHP code” radio button.

Warning!!! Before entering PHP code read the PHP code field description carefully. Incorrect code may cause serious errors.

Going forward, select the “PHP code” as mapping type and enter your PHP code. **WARNING!!!** Before entering PHP code read the PHP code field description carefully. Incorrect code may cause serious errors.

Please, don't forget to click “Save Mapping” button.



If you want to export all your customers to SugarCRM, you have to press “Export Customers to SugarCRM” button (the same instruction can be applied to Orders).

Table Synchronization

Export customers to SugarCRM

Export orders to SugarCRM

➕ Add Custom

Page of 19 pages | View per page | Total 375 records found

Reset Filter Search

Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected Actions Submit

	ID ↑	SugarCRM Module	SugarCRM Module ID	Magento Model	Magento ID	Customer First Name	Customer Last Name	Action
Any	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/>	2	Leads	b4cfcea7-dbb7-b673-0389-4d7a0ebc201e	Customers	2	DemocustomerFN	DemocustomerLN	<input type="text"/>
<input checked="" type="checkbox"/>	3	Contacts	4df8af6c-2b8e-7bde-35e5-4d7a0f8af9f9	Customers	3	DemocustomerFN1	DemocustomerLN1	<input type="text"/>
<input checked="" type="checkbox"/>	4	Leads	91688945-247d-6455-f600-4d7a0fa3d6eb	Customers	3	DemocustomerFN1	DemocustomerLN1	<input type="text"/>
<input checked="" type="checkbox"/>	6	Contacts	29830426-636c-c269-d20d-4d7a14805f1f	Customers	4	DemocustomerFN2	DemocustomerLN2	<input type="text"/>
<input checked="" type="checkbox"/>	7	Leads	706c09df-f799-69e7-dbbe-4d7a141191e3	Customers	4	DemocustomerFN2	DemocustomerLN2	<input type="text"/>
<input checked="" type="checkbox"/>	8	Contacts	572a8c4f-2105-abef-f5a2-4d92ff98f18a	Customers	1	testuser	testuser	<input type="text"/>
<input checked="" type="checkbox"/>	9	Leads	a5c06420-a6b2-a6f1-c44f-4d92ff6eeee4	Customers	1	testuser	testuser	<input type="text"/>
<input type="checkbox"/>	10	Opportunities	e863e6d1-2d89-0c24-ab25-4dada99d4f8b	Orders	1	testuser	testuser	<input type="text"/>
<input type="checkbox"/>	11	Contacts	e8da5ca5-a3a0-f12f-0278-4daf08de5d28	Customers	5	Erwann	Lanchec	<input type="text"/>



Thank you!

Should you have any questions or feature suggestions, please contact us at:

<http://amasty.com/contacts/>

Your feedback is absolutely welcome!



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