

Net-Results Marketing Automation

SugarCRM Integration Module

Installation and Use

Net-Results Marketing Automation SugarCRM Integration Module

Description

This document describes the installation, configuration and removal of the Net-Results SugarCRM integration module. This document is intended to be used in conjunction with SugarCRM versions v5.2, v5.5.0, v5.5.1, v5.5.4, v6.0, v6.1, and v6.2 -- CE, Pro, and Enterprise editions.

The Net-Results SugarCRM integration module enables bi-directional synchronization of leads and contacts between your SugarCRM instance and the Net-Results Marketing Automation platform.

- All SugarCRM contacts are synced to Net-Results automatically once every 24 hours
- A full synch may be run manually at any time
- A one-time synch is run automatically upon successful installation/configuration
- Each of these syncs pull only new leads/contacts or leads/contacts that have been altered since the last synchronization
- Contacts created within the Net-Results platform may be synced to SugarCRM via rule (campaign) or via manual selection

The Net-Results SugarCRM integration module adds certain custom fields to your SugarCRM installation in order to display lead/contact specific information gathered by Net-Results. The areas of SugarCRM enhanced by this module include:

- Accounts (detail view)
- Contacts (detail view)
- Leads (detail view)
- Net-Results Users (new module added)

Successful configuration of the Net-Results SugarCRM integration module enables additional features within the Net-Results user interface. These features give your users control over which contacts (existing or newly created in Net-Results) will be synced to your SugarCRM instance. The following areas within Net-Results are affected:

- My Visitors: The “Actions” pull-down menu has an “Add this Contact to Sugar” option
- Contact Edit: An additional button is available allowing you to add the contact to Sugar
- Campaigns: A campaign action is available that adds contacts to Sugar based on segment conditions of your choosing


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To Install:

- 1) Create your Sugar Users in Net-Results
 - a) Log into Net-Results
 - b) Navigate to My Account->User Setup->New User
 - c) Create any users that have leads, contacts, or accounts assigned to them.
 - d) Write down the email addresses(usernames) and passwords, as these will need to be entered into Sugar in a later step.


 - 2) Install Net-Results into Sugar (A Sugar User with admin privileges is required)
 - a) Navigate to Admin->Module Loader
 - b) Click on Browse and select the zip file Net-Results provided
 - c) Click on Upload
 - d) Click on Install
 - e) Click on Commit
 - f) Click on Back To Module Loader

 - 3) Add previously created Net-Results usernames and passwords into Sugar (A Sugar User with admin privileges is required. Once the users are created, they can edit their own information.)
 - a) Navigate to Net-Results Users
 - b) Click through to Create the user
 - c) Select the User, enter the Net-Results Username and Password
 - d) Click on Save
-  *Net-Results Usernames and Passwords are not required at this stage, but a user's Net-Results data will not display until this is entered and a sync has been performed.*
- 4) Let Net-Results know your Sugar Integration is setup
 - a) Send:
 - Sugar Username (user with access to API, get from sugar admin)
 - Sugar Password
 - Sugar URI (get from sugar admin)
 - Email addresses for sync notifications to
Net-Results - support@net-results.com

 - b) Net-Results will set up your integration and begin the initial sync of data between the two systems.

 *Depending on the number of contacts and leads, this can take some time.*

- c) An email will be sent to the notification email addresses with the sync is complete

 *Until you have received an email stating there was a successful sync, the Net-Results fields will not have any data.*



To Uninstall:

- 1) Uninstall Net-Results from Sugar (A Sugar User with admin privileges is required for this step)
 - a) Navigate to Admin->Module Loader
 - b) Find the Net-Results for SugarCRM Module and Click on Uninstall
 - c) Click on Commit



Net-Results Support

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