SugarCRM Checklist by Application

This document serves a guide to help organize and setup an Acoustic Campaign SugarCRM integration via Scribe Online. The steps provided do not always follow the order presented and will vary for each Company. **Please keep a copy of this guide and make notes for your Company’s records**.

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| **Date Completed** | **Integration Step or Task**  Note: These steps are intended for the administrators of SugarCRM, Acoustic Campaign and Scribe Online. | **Notes** |
| **Acoustic Campaign Admin** | | | |
| Date | [Create a new flexible database](https://help.goacoustic.com/hc/en-us/articles/360043568793-Create-a-flexible-database-for-SugarCRM) in Acoustic Campaign  Using an [existing prepopulated flexible database](https://help.goacoustic.com/hc/en-us/articles/360043055354-Use-an-existing-flexible-database-for-CRMi) is not advised due to potential duplication. |  |
| Date | If specifying a Campaign Org Admin user for the integration, ensure the [integration account has API](https://help.goacoustic.com/hc/en-us/articles/360043568913-Configure-an-integration-user-account-and-org-administrator-settings-for-SugarCRM) access. |  |
| Date | Select the new Flexible database as the CRM sync database. Configure your default [Acoustic Campaign to CRM sync options](https://help.goacoustic.com/hc/en-us/articles/360043053534-Associate-a-flexible-database-to-the-SugarCRM-integration) for ***new*** Leads that originate in Campaign. |  |
| Date | [Generate the Refresh Token for SugarCRM](https://help.goacoustic.com/hc/en-us/articles/360043572713-Post-installation-configuration-of-SugarCRM-Acoustic-Campaign-integration)  Note: First 7 steps. | To be given to CRM Admin to Configure the Acoustic Campaign Settings in SugarCRM at a later step. |
| Date | [Generate the Refresh](https://help.goacoustic.com/hc/en-us/articles/360043570673-Get-the-Scribe-refresh-token)[Token for Scribe Online](https://help.goacoustic.com/hc/en-us/articles/360043053434-Connect-the-Scribe-Online-to-Acoustic-Campaign) | To be given to Scribe Admin to Create the Acoustic Campaign Connection in Scribe Online |
| **SugarCRM Admin** | | | |
| Date | [Import](https://help.goacoustic.com/hc/en-us/articles/360043055574-Configure-the-SugarCRM-integration-Module) the Acoustic Campaign Integration Solution  to your SugarCRM environment. |  |
| Date | Configure the [Acoustic Campaign settings](https://help.goacoustic.com/hc/en-us/articles/360043572713-Post-installation-configuration-of-SugarCRM-Acoustic-Campaign-integration) in SugarCRM  for the integration. |  |
| Date | Configure your default [SugarCRM to Acoustic Campaign Sync options](https://help.goacoustic.com/hc/en-us/articles/360043572713-Post-installation-configuration-of-SugarCRM-Acoustic-Campaign-integration) for ***new*** Lead and Contact records in CRM   * + Note: The integration is designed to only retrieve Leads and Contacts from SugarCRM who have their “Sync to Acoustic Campaign” checkbox checked. Assuming you have an existing CRM population, you need to determine how to retroactively check the box on those after the Solution is installed (and) after test syncing a few sample records in prep for an initial mass sync from CRM to Acoustic Campaign.   + **IMPORTANT**: “Sync to Acoustic Campaign” is not to be toggled back and forth. Once the box is checked, it should not be unchecked. |  |
| **Tibco Scribe Online Admin** | | | |
|  | **Provision a Tibco Scribe Online Organization**  A Scribe Online Org will be created by Acoustic Provisioning and the contact from the provisioning case will be invited to join the org as an administrator. |  |
| Date | [Provision Scribe Online Cloud Agent for Online CRM orgs.](https://help.scribesoft.com/scribe/en/index.htm" \l "sol/agent/agentprovision.htm%3FTocPath%3DTIBCO%2520Scribe%25C2%25AE%2520Online%7CManaging%2520Agents%7C_____4)  \*On-Premise CRM’s May require an On-Premise Scribe Online Agent. [Please see Tibco’s full documentation on Agents.](https://help.scribesoft.com/scribe/en/index.htm#sol/agent/agentmain.htm%3FTocPath%3DTIBCO%2520Scribe%25C2%25AE%2520Online%7CManaging%2520Agents%7C_____0) |  |
| Date | [Setup Scribe Acoustic Campaign Connection](https://help.goacoustic.com/hc/en-us/articles/360043569453-Configure-the-Scribe-connection) |  |
| Date | [Setup Scribe SugarCRM Connection](https://help.goacoustic.com/hc/en-us/articles/360043569453-Configure-the-Scribe-connection) |  |
| Date | Create a [Solution in Scribe](https://help.goacoustic.com/hc/en-us/articles/360044383494-SugarCRM-Scribe-Solution-Management) for Syncing lead\contact records. |  |
| Date | Download and Import the mapping templates.  [Scribe maps for SugarCRM integration](https://help.goacoustic.com/hc/en-us/articles/360044383494-SugarCRM-Scribe-Solution-Management) |  |
| Date | Map fields in Scribe to prepare for the initial sync. |  |
| **Cross Admin Collaborations** | | | |
| Date | The CRM and Marketing team should meet to discuss the field they wish to be mapped. The field mapping exercise in Scribe Online is dependent on what Lead/Contact/Account fields have been decided on. It is very important that the field ‘type’ is consistent, otherwise number fields will be mapped to text fields and this will likely cause problems. | CRM Admin and Acoustic Campaign Admin |
| **Finalize the Synchronization Setup** | | | |
| Date | Review the maps & activate the initial record sync.  If applicable, set the sync Schedule in Scribe Online.  Note: [See “Note: Testing” recommendations here](https://help.goacoustic.com/hc/en-us/articles/360044383494-SugarCRM-Scribe-Solution-Management). |  |

## SugarCRM Integration Feature Matrix

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| Integration Features List | [Overview](https://help.goacoustic.com/hc/en-us/articles/360042905574-Overview-of-CRM-integrations-with-Acoustic-Campaign) |  |