TIBCO Flogo® Connector for SugarCRM User's Guide

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TIBCO Documentation and Support Services

How to Access TIBCO Documentation

Documentation for TIBCO products is available on the TIBCO Product Documentation website, mainly in HTML and PDF formats.

The TIBCO Product Documentation website is updated frequently and is more current than any other documentation included with the product. To access the latest documentation, visit https://docs.tibco.com.

Product-Specific Documentation

The following documentation for this product is available on the TIBCO Flogo® Connector for SugarCRM Product Documentation page.

- *TIBCO Flogo® Connector for SugarCRM Release Notes*
- *TIBCO Flogo® Connector for SugarCRM Installation*
- *TIBCO Flogo® Connector for SugarCRM User's Guide*

How to Contact TIBCO Support

You can contact TIBCO Support in the following ways:

- For an overview of TIBCO Support, visit http://www.tibco.com/services/support.
- For accessing the Support Knowledge Base and getting personalized content about products you are interested in, visit the TIBCO Support portal at https://support.tibco.com.
- For creating a Support case, you must have a valid maintenance or support contract with TIBCO. You also need a user name and password to log in to https://support.tibco.com. If you do not have a user name, you can request one by clicking Register on the website.

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Overview

SugarCRM is an open source customer relationship management software used primarily for marketing and sales applications. This connector will perform the Create, Query, Update and Delete operations on the contents of SugarCRM system modules.

Creating a SugarCRM Connection

You must create a SugarCRM connection before you can use the TIBCO Flogo® Connector for SugarCRM connector. The SugarCRM connection contains all the parameters required to connect to the SugarCRM REST API. The SugarCRM connection is used by all the activities in the **SugarCRM** category.

To create a flow using the **ReceiveSugarCRMMessage** trigger see the "Creating a Connection Flow" topic.

Before you create a SugarCRM connection, be sure that you have an active SugarCRM account.

To create a SugarCRM connection, click the **Connections** tab on the Flogo Enterprise page.

If this is the first connection you are adding, follow these steps:

1. Click the **SugarCRM Connector** tile.
2. Enter the values for the fields in the **SugarCRM Connector** dialog. See SugarCRM Connection Details topic for a description of the fields.
3. Click **Save Connection**.

If you already have an existing connections for any connector in Flogo Enterprise, the connections will be displayed on the **Connections** page.

1. Click **Add Connection**.
2. Click the **SugarCRM Connector** tile.
3. Enter the values for the fields in the **SugarCRM Connector** dialog. See SugarCRM Connection Details topic for a description of the fields.
4. Click **Save Connection**.

When you attempt to save the connection, if it fails to acquire an OAUTH token for any reason, an error message will be displayed at the bottom of the dialog. If you get a status code 401 “unauthorized”, check the values entered for all the fields above for accuracy.

SugarCRM Connection Details

Provide the information of the SugarCRM instance that this connection will connect to. See the SugarCRM documentation for a detailed explanation of these fields.

The **SugarCRM Connection Details** dialog contains the following fields:

Field	Description
Name	The unique name of the connection as it displays in dropdown selection boxes in each of the activities for the TIBCO Flogo® Connector for SugarCRM connector.
Description	A brief description of this SugarCRM connection.
SugarCRM URL	A fully qualified URL for the server with no path elements appended. For example, https://tibcotcidemo.sugarcrm.com
Client ID	Client ID that is a part of the OAUTH2 token configuration. If your SugarCRM instance is version 9.2 or greater you may not have a separate oauth config to use. In this case the provided client ID is `sugar`.

Field	Description
Client Secret	Client secret that is a part of the OAUTH2 token configuration. If your SugarCRM instance is version 9.2 or greater and you are using the provided `sugar` client ID, then no password is required.
User Name	The SugarCRM application user name to be used with this connection. Since a running connector instance may conflict with your web UI session (i.e. it may get logged off) it is advisable to create a separate user for each connector application.
Password	The SugarCRM password for the above username. This password will not be kept or stored beyond the time it takes to acquire an OAUTH2 connection object from the server.

ReceiveSugarCRMMessage Trigger

The SugarCRM server provides a facility called Web Logic Hooks with which records that have been created, deleted and changed can be forwarded periodically to other services. Its purpose is to synchronize those changes with another system.

The **ReceiveSugarCRMMessage** trigger is a REST endpoint which accepts posted data from a Web Logic Hook of the SugarCRM server. The **ReceiveSugarCRMMessage** trigger supports multiple trigger handlers. A single trigger can execute multiple flows, or multiple triggers can execute the same flow, based on the port and the path field values.

Before using the **ReceiveSugarCRMMessage** trigger, create a Web Logic Hook in SugarCRM. To create a Web Logic Hook, open the administration page of the SugarCRM web application while logged in as an administrator. Select the **Web Logic Hooks** link from that page. On the Web Logic Hooks page, select the **Create** button. Enter the following information when prompted:

- **URL** - Enter the REST endpoint you get from the **Copy** link on the **View and Test** link in the **Apps** page in Flogo Enterprise. To that URL, append the path which you will configure the trigger to listen on.
- **Trigger Event** - **After Save** and **After Delete** are the only values supported by the trigger at this time.
- **Module Name** - Select the module whose change information you want to capture.
- **Request Method** - POST is the only method supported by the trigger.

To create a flow using the **ReceiveSugarCRMMessage** trigger see "Creating a Connection Flow".

Configuration

The **Configuration** tab has the following fields that identify which SugarCRM connection to use and the type of object to create.

Field	Description
Module	The name of the SugarCRM module whose data is being forwarded to the trigger. Select the module type you want to create.
Path	The resource path for the REST service. This must match the path entered in the URL field when creating the Web Logic Hook link on the SugarCRM server. The path must begin with a / (forward slash).
Port	The port assigned for the SugarCRM receiver, that is used to listen for any requests for this trigger.

Output

The schema for the output data of this activity is displayed in a tree format in this tab. This schema will vary depending on the **Connection** and **Module** you select in the **Configuration** tab. The output of an activity is displayed for informational purposes only and cannot be modified or altered. The properties that are displayed in the **Output** tab schema correspond to the output of this activity and can be used as input by subsequent activities in the flow.

SugarCRMCreate

Use this activity to create a record for the selected module.

Configuration

The **Configuration** tab has the following fields that identify which SugarCRM connection to use and the type of object to create.

Field	Description
Connection	SugarCRM connection name to use when accessing the SugarCRM system. If you have created multiple SugarCRM connections, select the one you want to use from the dropdown menu for this field.
Module	SugarCRM module name. Select the module type you want to create.
Bulk Create	Selecting **True** allows you to create multiple records simultaneously (in bulk). It also changes the input schemas to an array of records instead of a single record. Select **False** if you want to create a single record only. By default this field is set to **False**.

Input

The input field is defined by the input schema for the chosen module and will be dynamically updated as modules are selected from the dropdown list.

You have the option to either enter the input manually or map the input to the output from a preceding activity provided that the preceding activity has an output. Refer to the "Using the Mapper" section in the *TIBCO Flogo® Enterprise User's Guide* for details on how to use the mapper.

Output

The schema for the output data of this activity is displayed in a tree format in this tab. The elements that you see in the schema can be mapped as input to the activities which follow this activity in the flow.

SugarCRMQuery

Using this activity flows can query the SugarCRM system for the details of any record in any module. Records can be explicitly selected by their ID field or can be filtered.

Configuration

The **Configuration** tab has the following fields that identify which SugarCRM connection to use and the type of object to create.

Field	Description
Connection	SugarCRM connection name to use when accessing the SugarCRM system. If you have created multiple SugarCRM connections, select the one you want to use from the drop down menu for this field.
Module	SugarCRM module name. Select the module type you want to create.

Input Settings

You can add or remove the fields using **Add Row** or **Delete Row** buttons available below the fields label.

Field	Description
filter	Enter a JSON encoded filter string to allow the selection of specific records. Refer to the SugarCRM documentation for help on composing filters. This field validates the syntax of the JSON code for you.
fields	Controls the fields returned for each record in the result set. This is useful for reducing the amount of data transferred, and therefore the impact of the flow on the network and the server. Only the fields selected here will display in the **Output** tab.

Input

Field	Description
ID	The ID field causes the query to return exactly one record if the ID matches the ID of an existing record. If the value in this field is present the **filter**, **maxnum**, and **offset** fields are ignored.
filter	Enter a JSON encoded filter string to allow the selection of specific records. Refer to the SugarCRM documentation for help on composing filters. The JSON string that you enter here must be syntactically correct. Otherwise, you will encounter runtime errors. If you enter different JSON strings in the **filter** fields for **Input Settings** and **Input** tabs your result will be based on the filter value provided in **Input** tab. The filter value you entered in the **Input Setting** tab will be ignored.
maxnum	Controls the maximum number of records in the returned result set

Field	Description
offset	Offsets or skips a number of matching records before composing the result set.

Output

The output data for this activity. The entire list of possible output fields is presented here, but only the fields selected in the query parameter will actually be used at runtime. The elements that you see in the schema can be mapped as input to the activities which follow this activity in the flow.

SugarCRMUpdate

This activity allows a flow to update a single record in the SugarCRM system.

Configuration

The **Configuration** tab has the following fields that identify which SugarCRM connection to use and the type of object to create.

Field	Description
Connection	SugarCRM connection name to use when accessing the SugarCRM system. If you have created multiple SugarCRM connections, select the one you want to use from the drop down menu for this field.
Module	SugarCRM module name. Select the module type you want to create.
Bulk Update	Selecting **True** allows you to update multiple records simultaneously (in bulk). It also changes the input schemas to an array of records instead of a single record. Select **False** if you want to update a single record only. By default this field is set to **False**.

Input

The ID field causes a query to return exactly one record if the ID matches the ID of an existing record.

You have the option to either enter the input manually or map the input to the output from a preceding activity provided that the preceding activity has an output. Refer to the "Using the Mapper" section in the *TIBCO Flogo® Enterprise User's Guide* for details on how to use the mapper.

Output

This tab displays the JSON schema for the output fields in a tree structure.

The elements that you see in the schema can be mapped as input to the activities which follow this activity in the flow.

SugarCRMDelete

This activity deletes the specified record from the specified module.

Configuration

The **Configuration** tab has the following fields that identify which SugarCRM connection to use and the type of object to create.

Field	Description
Connection	SugarCRM connection name to use when accessing the SugarCRM system. If you have created multiple SugarCRM connections, select the one you want to use from the drop down menu for this field.
Module	SugarCRM module name. Select the module type you want to delete.
Bulk Delete	Selecting **True** allows you to delete multiple records simultaneously (in bulk). It also changes the input schemas to an array of records instead of a single record. Select **False** if you want to delete a single record only. By default this field is set to **False**.

Input

Enter the identifier for the SugarCRM record that you want to delete. If the ID field matches the ID of an existing record, the record will be deleted.

Output

Returns a message on successful completion. If the operation is not successful an exception will be thrown.