

SugarCRM Get Contacts Activity

Introduction

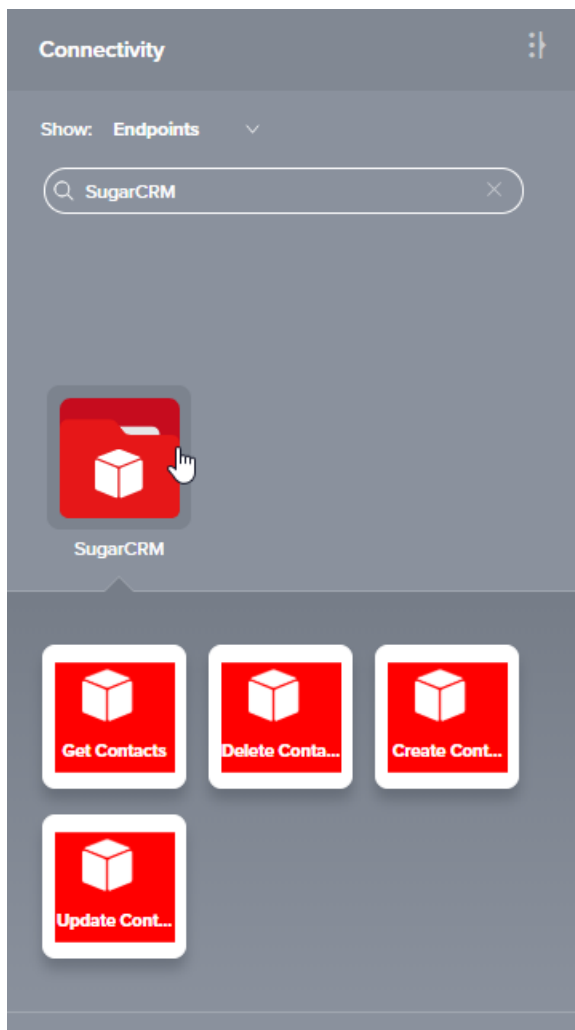
A SugarCRM get contacts activity retrieves all the contacts from a SugarCRM connection and is used as a source in an operation. After configuring a SugarCRM connection, you can configure as many SugarCRM activities as you like for each SugarCRM connection.

Creating a SugarCRM Activity

From the design canvas, open the **Connectivity** tab of the design component palette:



Within the **Endpoints** filter, click the SugarCRM connection block to display activities that are available to be used with a SugarCRM connection:



To create an activity that can be configured, the activity must first be added to an operation on the design canvas. To add an activity to an operation, drag the activity block from the palette to the operation.

For more information about the parts of an operation and adding activities to operations, see [Operation Creation and Configuration](#).

Accessing Menu Actions

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After a SugarCRM activity has been added to an operation, menu actions for that activity are accessible from the project pane in either the **Workflows** or the **Components** tabs, and from the design canvas:

- **Project Pane:** In the **Workflows** or **Components** tab of the project pane, hover over an activity name and click the actions menu icon to open the actions menu.
- **Design Canvas:** Within the operation, click an existing activity block to open the actions menu.

Each of these menu actions is available:

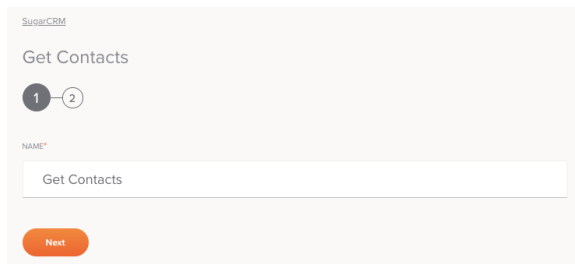
- **View/Edit:** This opens the activity configuration screen for you to configure the activity. For details, see *Configuring a SugarCRM Get Contacts Activity* later on this page.
- **Delete:** This is used to permanently delete the activity.
- **Rename:** This positions the cursor on the activity name in the project pane for you to make edits.
- **View Dependencies:** This changes the view in the project pane to display any other parts of the project that the activity is dependent on.
- **Remove:** Available only from the actions menu on the design canvas, this removes the activity as a step in the operation without deleting it from the project. When you remove an activity that is adjacent to a transformation, if schemas are provided within that activity, they will no longer be referenced by the transformation. Removed components can be accessed or permanently deleted from the project pane.
- **Deploy:** This deploys the activity and any components it is dependent on.
- **Configurable Deploy:** This opens the deployment screen, where you can select project components to deploy.
- **Add to group:** This opens a prompt to create a new custom group or to add the component to an existing group.
- **Duplicate:** This creates a copy of the activity as a new, unreferenced component. Upon creating the component copy, the cursor is positioned on the component name within the project pane for you to rename the component.


Configuring a SugarCRM Get Contacts Activity

Follow these steps to configure a SugarCRM get contacts activity:

- Step 1 – Enter Basic Information
- Step 2 – Review Data Schema

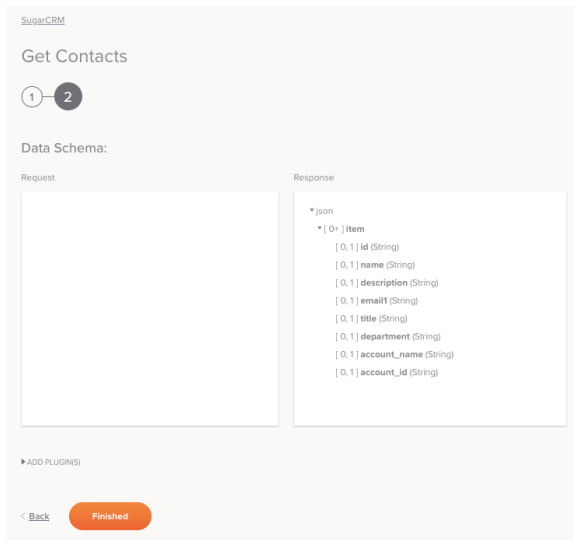
Step 1 – Enter Basic Information



TIP: Fields with a variable icon  support using global variables, project variables, and Jitterbit variables. Begin typing an open square bracket [into the field or click the variable icon to display existing variables to choose from.

- **Name:** Enter a name to use to identify the SugarCRM get contacts activity. The name must be unique for each get contacts activity and must not contain forward slashes (/) or colons (:).
- **Save & Exit:** If enabled, click to save the configuration for this step and close the activity configuration.
- **Next:** Click to temporarily store the configuration for this step and continue to the next step. The configuration will not be saved until you click the **Finished** button on the last step.
- **Discard Changes:** After making changes, click **Discard Changes** to close the configuration without saving changes made to any step. A message will ask you to confirm that you want to discard changes.

Step 2 – Review Data Schema



- **Data Schema:** The response data schema from SugarCRM will be displayed. If the operation uses a transformation, the data schemas will be displayed again later during the transformation mapping process, where you can map to target fields using source objects, scripts, variables, custom values, and more.

The SugarCRM connector uses the [SugarCRM REST API](#). Refer to the API documentation for information for information on the schema fields.

- **Add Plugin(s):** Plugins are Jitterbit- or user-provided applications that extend Harmony's native capabilities. To apply a plugin to the activity, click to expand this section and select the checkbox next to the plugin to be used. For additional instructions on using plugins, including details on setting any required variables used by the plugin, see [Plugins Added to an Activity](#).
- **Back:** Click to temporarily store the configuration for this step and return to the previous step.
- **Finished:** Click to save the configuration for all steps and close the activity configuration.
- **Discard Changes:** After making changes, click **Discard Changes** to close the configuration without saving changes made to any step. A message will ask you to confirm that you want to discard changes.

Next Steps

After configuring a SugarCRM get contacts activity, complete the configuration of the operation by adding and configuring other activities, transformations, or scripts as operation steps. You can also configure an operation's operation settings, which include the ability to chain operations together that are in the same or different workflows.

SugarCRM get contacts activities can be used as a source with these operation patterns:

- [Transformation Pattern](#)
- [Two-Target Archive Pattern](#) (as the first source only)
- [Two-Transformation Pattern](#) (as the first or second source)

Other patterns are not valid using SugarCRM get contacts activities. See the validation patterns on the [Operation Validity](#) page.

To use the activity with scripting functions, write the data to a temporary location and then use that temporary location in the scripting function.

When ready, deploy and run the operation and validate behavior by checking the operation logs.