Outlook Connector for Creatio
Admin Guide

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▪ Requirements

Microsoft Outlook Compatibility

The Outlook Connector Basic Edition and Plus Edition integrates with Microsoft Classic-Outlook Desktop for Windows. Supported Versions include Classic-Outlook 2013, 2016, 2019, 2021 and 365 Desktop.

> NOTE: Microsoft New-Outlook is a simplified version of Classic-Outlook and does not support any COM/VSTO Add-Ins, such as the Outlook Connector. As such, the Connector will not work with New-Outlook.

> The Outlook Connector is not compatible with Outlook in the browser, on mobile, or with MacOS.

Creatio Compatibility

The Outlook Connector Basic Edition and Plus Edition integrates with Creatio Cloud and SaaS versions of all Creatio platforms (Growth, Enterprise, and Unlimited).

The Outlook Connector Basic Edition and Plus Edition integrates with the Creatio Sales and Service products.

> NOTE: some functionality within the Outlook Connector is determined by the Creatio product. Example: Outlook email integration to Creatio Cases requires that the product user has a Creatio Service license.

Connecting an Email from Outlook to a Record in Creatio requires the Email Account to be configured and receiving emails in both environments (Outlook and Creatio).

Emails received in Creatio are handled as Activity records, and it is the Activity that manages the connections created using the Outlook Connector.

Creatio Custom Objects

Custom development by Kewl Consulting is required for the Outlook Connector to integrate with custom objects in Creatio. Contact Kewl Consulting at marketplace@kewlconsulting.com to detail your project requirements and receive a quote.

Pre-requisite: the Outlook Connector Plus Edition is required for custom development projects.

SSO Supported

Only the Outlook Connector **Plus Edition** is SSO supported (Okta, Azure and Google).
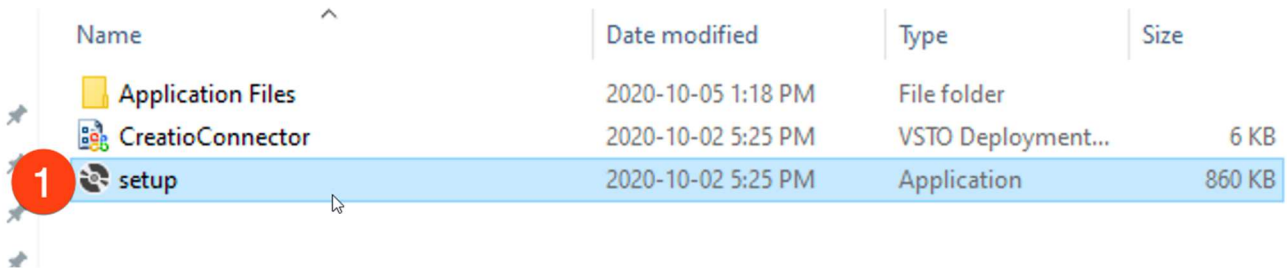
▪ Installation

Download the .zip file containing the Outlook Connector provided by marketplace@kewlconsulting.com.

> NOTE: a Microsoft Office certificate error may occur during installation if your Windows security policy flagged the external .zip file upon download. This error can be pre-empted prior to installation by first checking the .zip file properties for the Blocked checkbox. See FAQ's below for steps to unblock the .zip file.
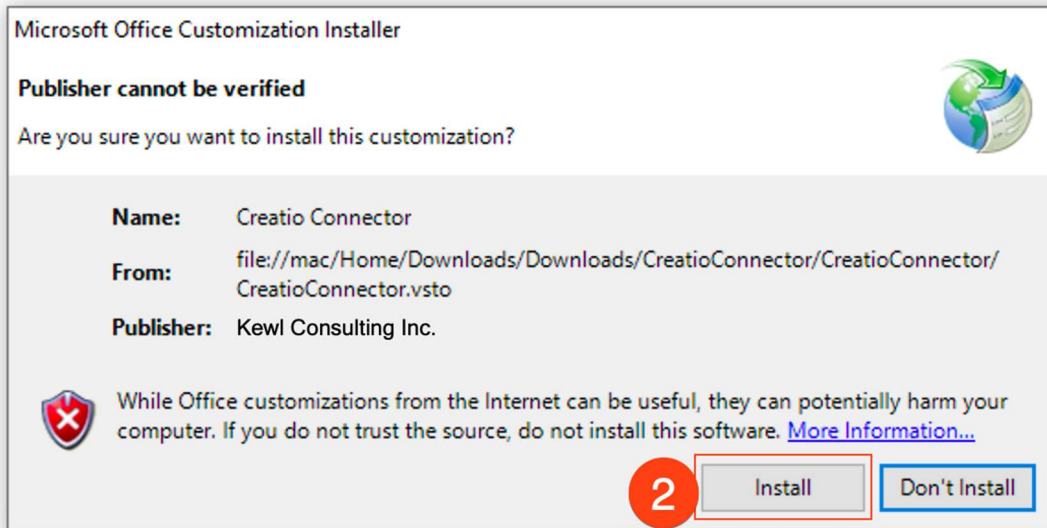
Once the file has been downloaded, unarchive the zip file and follow the steps below.
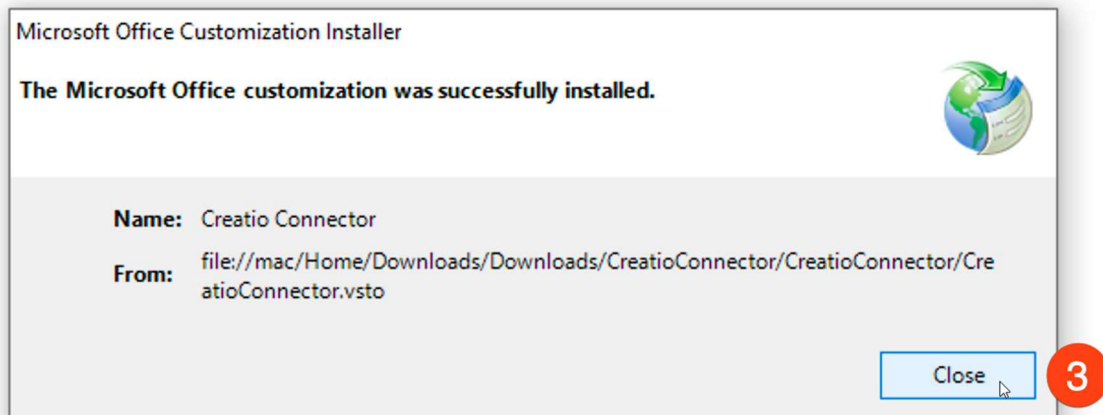
1. Run Setup.exe (1)

Name	Date modified	Type	Size
📁 Application Files	2020-10-05 1:18 PM	File folder	
📇 CreatioConnector	2020-10-02 5:25 PM	VSTO Deployment...	6 KB
① 🔄 setup	2020-10-02 5:25 PM	Application	860 KB

2. When prompted regarding the publisher, Kewl Consulting, accept the verification by clicking the Install button (2)

Microsoft Office Customization Installer

Publisher cannot be verified

Are you sure you want to install this customization?

Name:	Creatio Connector
From:	file://mac/Home/Downloads/Downloads/CreatioConnector/CreatioConnector/CreatioConnector.vsto
Publisher:	Kewl Consulting Inc.

While Office customizations from the Internet can be useful, they can potentially harm your computer. If you do not trust the source, do not install this software. More Information...
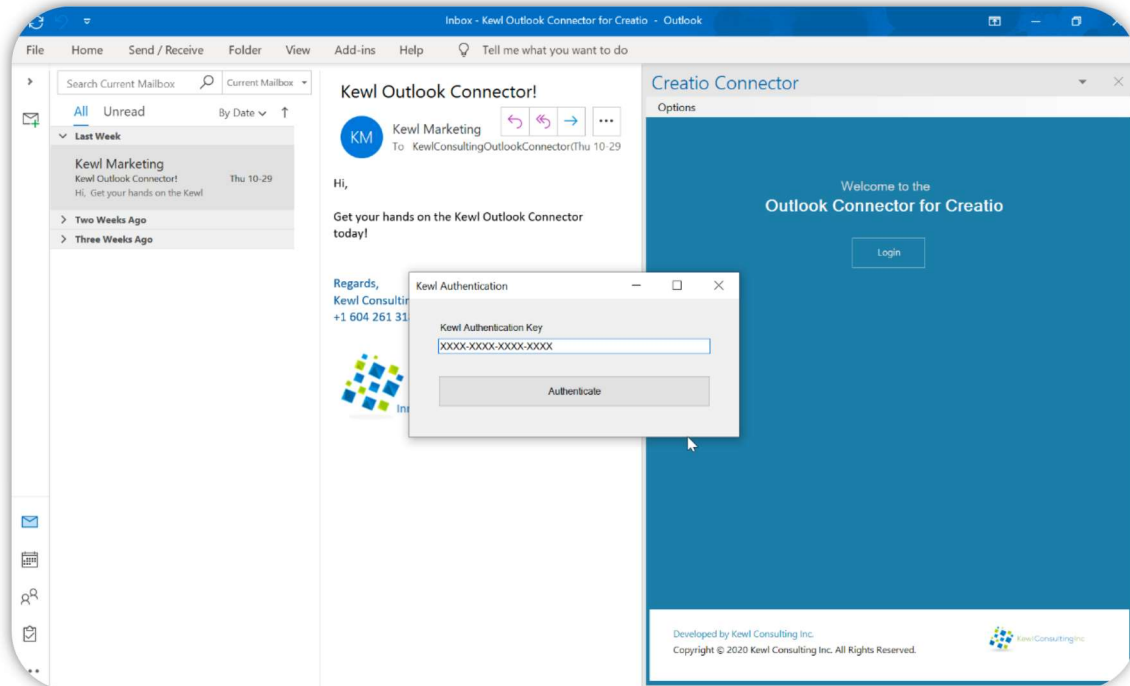
② | Install | | Don't Install |

3. The installation will take a few moments, once complete the window can be closed (3)

Authenticating your Outlook Connector License

Once the Connector is installed click the Login button. If this is the first time launching the Connector you will be prompted to enter a Kewl Authentication Key. This key is provided by Kewl Consulting after purchasing the product. Enter your key and click the Authenticate button to proceed. You only need to enter your key once. After authentication, you will need to click the Login button again to sign into your Outlook Connector instance.
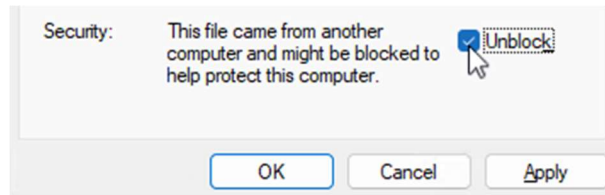
FAQ's

▪ Certificate Error During Installation

During installation Windows may raise an installation error. If you encounter this, please do the following **before** unzipping the installation files:

1. Right-click the .zip file
2. Select Properties
3. Check Unblock

4. Click Apply
5. Proceed with standard Installation steps

▪ Mass Deployment of the Outlook Connector

There is no functionality built into the Outlook Connector Basic Edition or Plus Edition for mass deployment to product users.

However, the authentication key is stored in an XML file in the user directory and the Outlook Connector validates this key when launched. If a pre-populated XML file can be deployed to each user, this would bypass the necessity for individuals to manually enter the authentication key upon the initial launch of the Outlook Connector.

▪ Development and Pre-Production Site Support

Outlook Connector Licenses for Development and Pre-Production sites can be requested from Kewl Consulting for no additional fee.

▪ Multiple Creatio Instances

The Outlook Connector supports multiple Creatio Instances. Each Creatio instance with a unique URL will require a separate Outlook Connector License. Once licensed each Creatio instance is accessible via a single Outlook Connector installation.

Support

Support is available by email at [marketplace@kewlconsulting.com.](mailto:marketplace@kewlconsulting.com)

The Kewl Consulting support team is in the **pacific time zone**, available weekdays between 8:00 am - 5:00 pm.