

Microsoft Forms Connector - Creatio

Installation Guide

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Overview

Outline

This Connector is used to create a lead automatically when a Microsoft Form is submitted.

Business use case

A lead has to be created through various sales funnel right after identifying the target audience.

Using Microsoft Forms Connector, a lead is created in Creatio by an automatic process without any interruption from Microsoft Form submission. A lead can be nurtured then and converted into a successful sale.

Solution

Any business organization (owns Creatio Marketing, Creatio Service – Customer Center, Service Enterprise) who is seeking for a lead creation through landing page & web forms.

Benefits

- Any business organization can significantly reduce the time take to generate a lead.
- Ability to create a Lead, Events registration and other web forms enable you to transfer the form responses to any Creatio system objects (Ex. Lead, Event objects).
- Ability to create a record for custom objects of Creatio.

Guide For Using the Connector



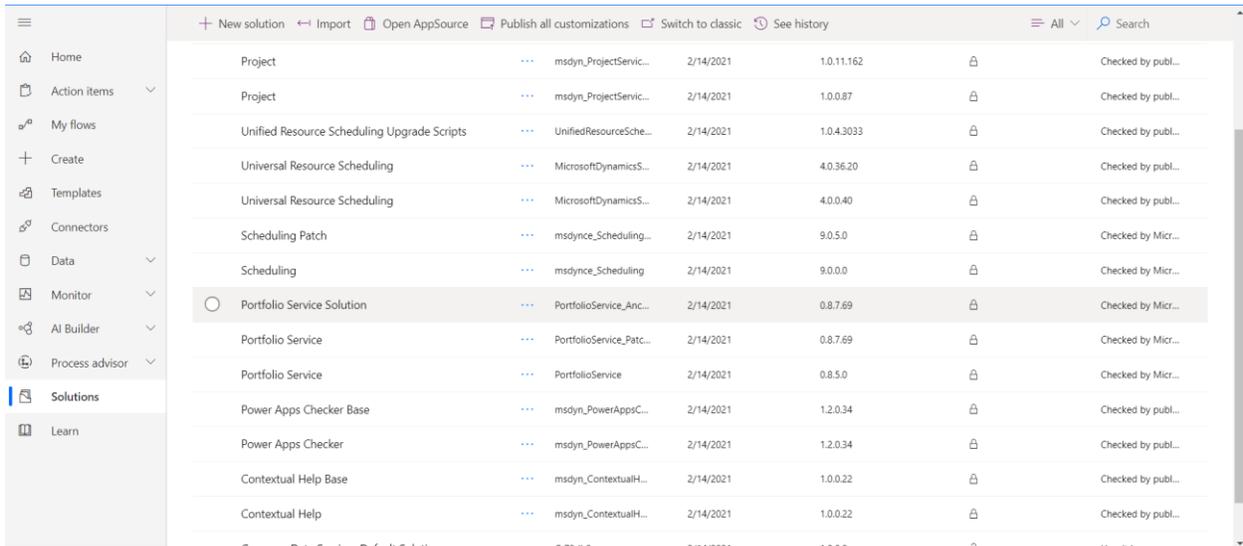
CreatioSolution

We will provide Microsoft Forms Connector in a ZIP (CreatioSolution.zip) package

Steps to Install Microsoft Forms Connector.

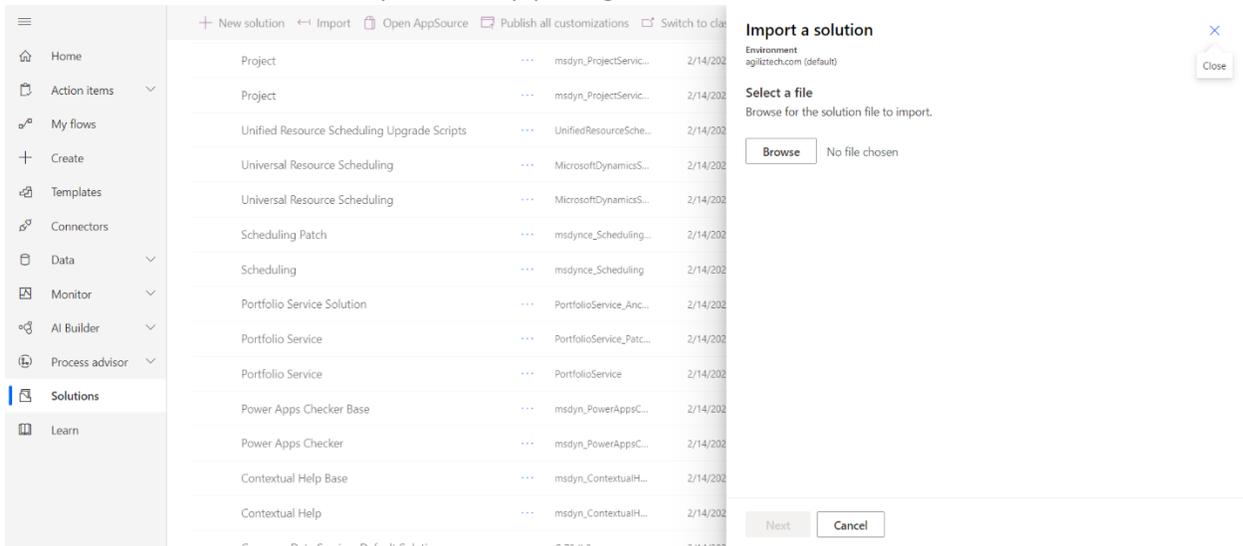
1. Kindly go to the following link <https://flow.microsoft.com/> and select Power Automate.
2. Select the solutions options in the left panel (Menu item).

3. Click import as depicted below,



Project	msdyn_ProjectServic...	2/14/2021	1.0.11.162	Checked by publ...
Project	msdyn_ProjectServic...	2/14/2021	1.0.0.87	Checked by publ...
Unified Resource Scheduling Upgrade Scripts	UnifiedResourceSche...	2/14/2021	1.0.4.3033	Checked by publ...
Universal Resource Scheduling	MicrosoftDynamicsS...	2/14/2021	4.0.36.20	Checked by publ...
Universal Resource Scheduling	MicrosoftDynamicsS...	2/14/2021	4.0.0.40	Checked by publ...
Scheduling Patch	msdynce_Scheduling...	2/14/2021	9.0.5.0	Checked by Micr...
Scheduling	msdynce_Scheduling	2/14/2021	9.0.0.0	Checked by Micr...
<input type="radio"/> Portfolio Service Solution	PortfolioService_Anc...	2/14/2021	0.8.7.69	Checked by Micr...
Portfolio Service	PortfolioService_Patc...	2/14/2021	0.8.7.69	Checked by Micr...
Portfolio Service	PortfolioService	2/14/2021	0.8.5.0	Checked by Micr...
Power Apps Checker Base	msdyn_PowerAppsC...	2/14/2021	1.2.0.34	Checked by publ...
Power Apps Checker	msdyn_PowerAppsC...	2/14/2021	1.2.0.34	Checked by publ...
Contextual Help Base	msdyn_ContextualH...	2/14/2021	1.0.0.22	Checked by publ...
Contextual Help	msdyn_ContextualH...	2/14/2021	1.0.0.22	Checked by publ...

4. Select Browse and select the provided zip package.



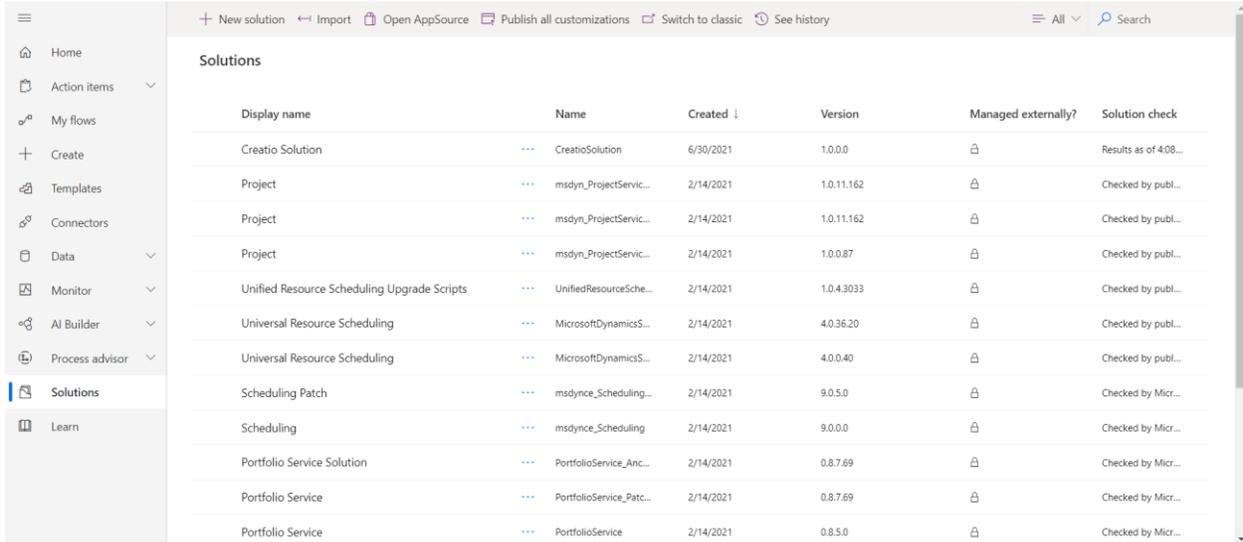
Import a solution
Environment: agilztech.com (default)

Select a file
Browse for the solution file to import.

No file chosen

Then, click on import button once you selected the provided CreztioSolution.zip package.

5. The solution gets installed successfully and you can consume our Microsoft Forms connector for Creatio. On successful installation it is seen that Creatio solution is added in the list as below.



Display name	Name	Created I	Version	Managed externally?	Solution check
Creatio Solution	CreatioSolution	6/30/2021	1.0.0.0	☺	Results as of 4:08...
Project	msdyn_ProjectServic...	2/14/2021	1.0.11.162	☺	Checked by publ...
Project	msdyn_ProjectServic...	2/14/2021	1.0.11.162	☺	Checked by publ...
Project	msdyn_ProjectServic...	2/14/2021	1.0.0.87	☺	Checked by publ...
Unified Resource Scheduling Upgrade Scripts	UnifiedResourceSche...	2/14/2021	1.0.4.3033	☺	Checked by publ...
Universal Resource Scheduling	MicrosoftDynamicsS...	2/14/2021	4.0.36.20	☺	Checked by publ...
Universal Resource Scheduling	MicrosoftDynamicsS...	2/14/2021	4.0.0.40	☺	Checked by publ...
Scheduling Patch	msdynce_Scheduling...	2/14/2021	9.0.5.0	☺	Checked by Micr...
Scheduling	msdynce_Scheduling	2/14/2021	9.0.0.0	☺	Checked by Micr...
Portfolio Service Solution	PortfolioService_Anc...	2/14/2021	0.8.7.69	☺	Checked by Micr...
Portfolio Service	PortfolioService_Patc...	2/14/2021	0.8.7.69	☺	Checked by Micr...
Portfolio Service	PortfolioService	2/14/2021	0.8.5.0	☺	Checked by Micr...

Automated Microsoft Cloud flow procedure

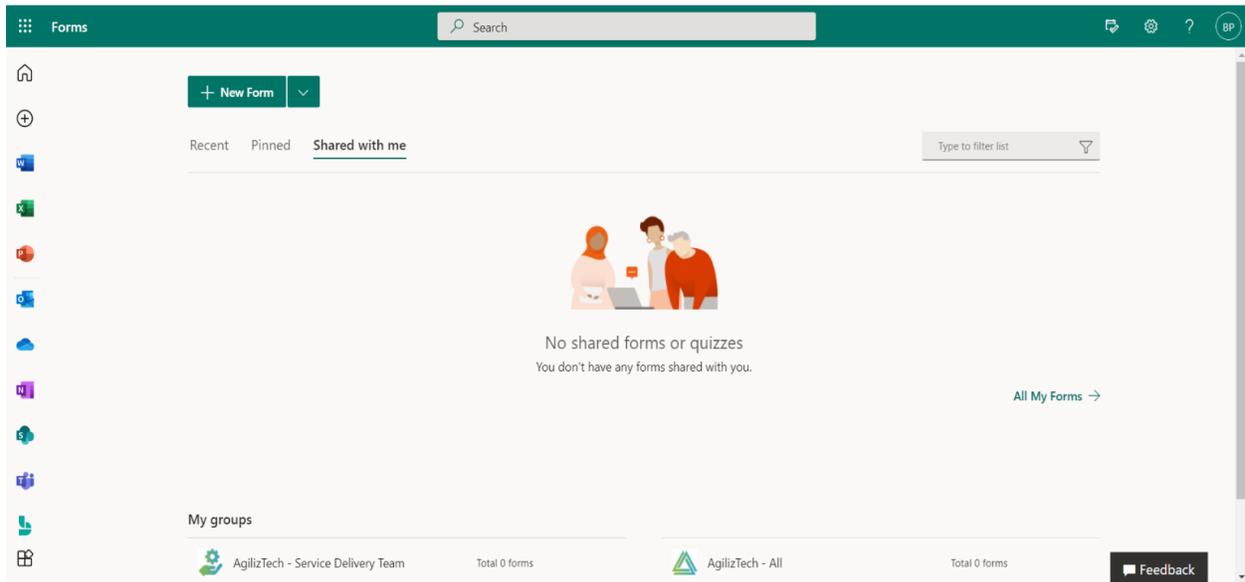
Step 1: Microsoft Forms Creation

1. Go to the following link <https://flow.microsoft.com/> and select Forms to create a customized Microsoft Forms pertaining to the business need.

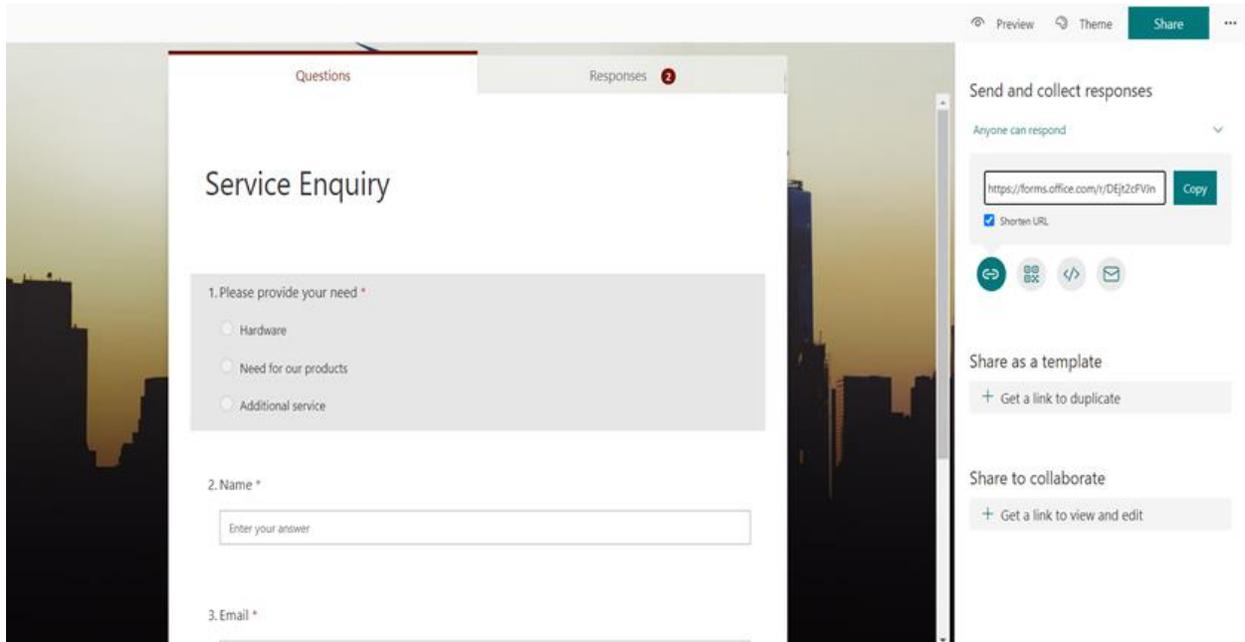
A form can be created with the following fields,

- Text (line)
- Text (Paragraph)
- Date/Time
- Number
- Email
- Drop-down List,

Microsoft Form creation,

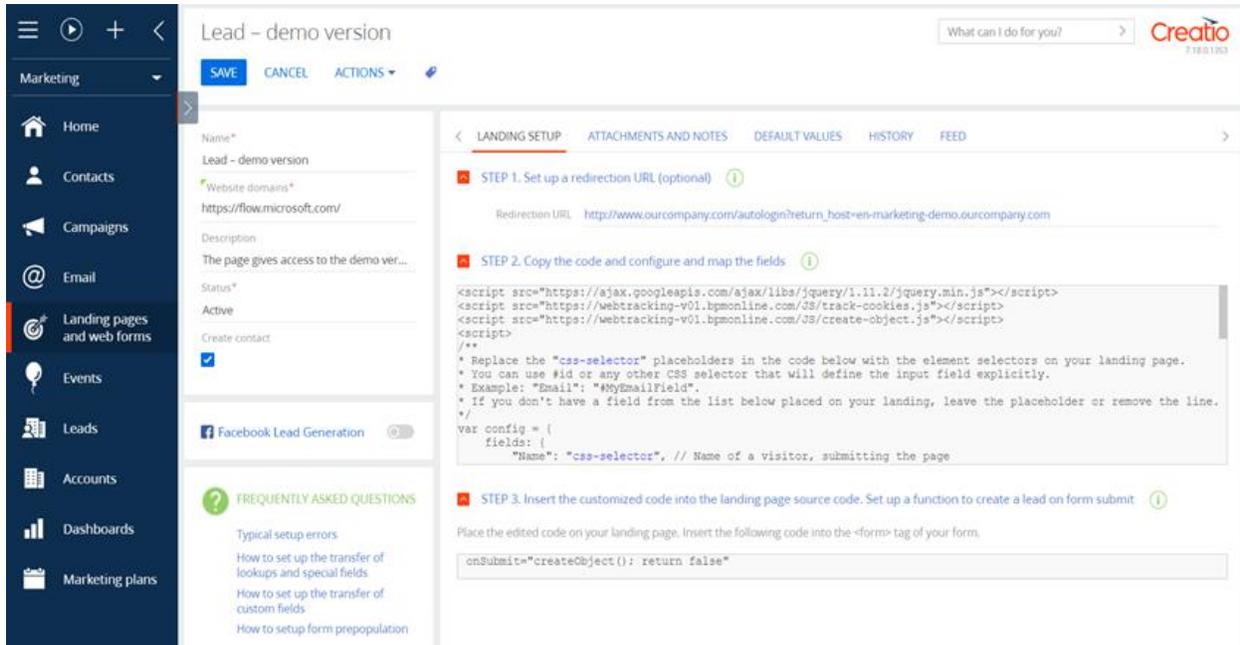


2. Shorten the URL and Copy the URL which routes to the Created Microsoft form.



Step 2: Setting up Landing page.

- Open the service or Marketing Workspace in the Creatio and choose the Landing Pages and Web Forms section.
- Click on New and select Lead registration form.
- Provide the new landing page name for Lead registration.
- Set the value of Website Domain as <https://flow.microsoft.com/> Since Creatio system should know the root of the request (the source from where the API call is made for Authentication)

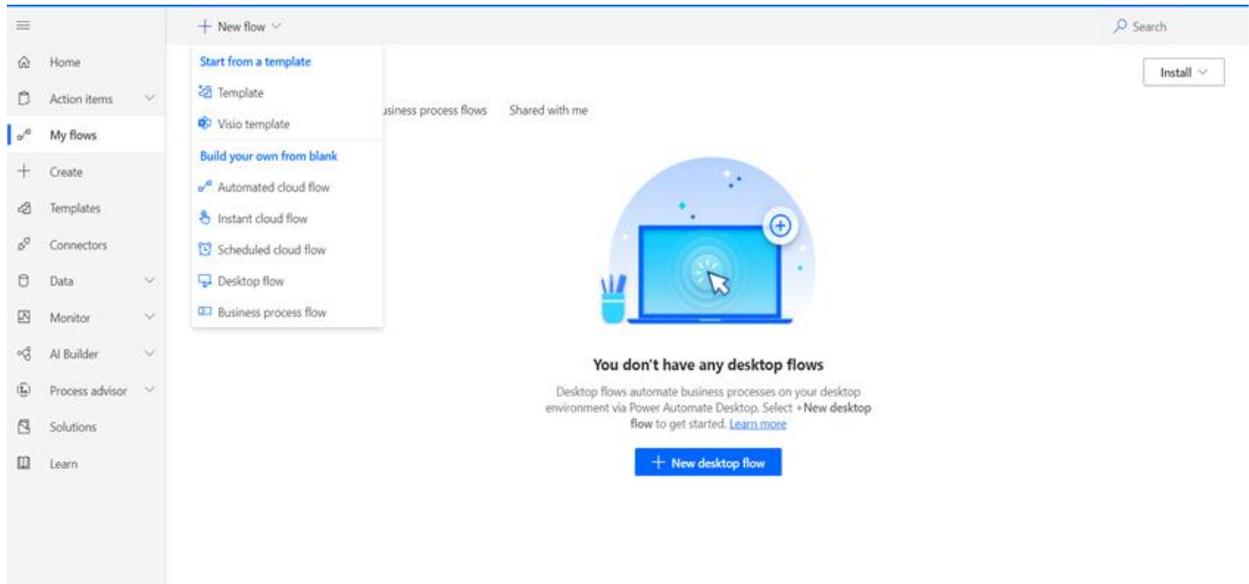


Note: The Create Contact checkbox can be activated to create a contact automatically when the Microsoft form is submitted. (The checkbox is disabled by default).

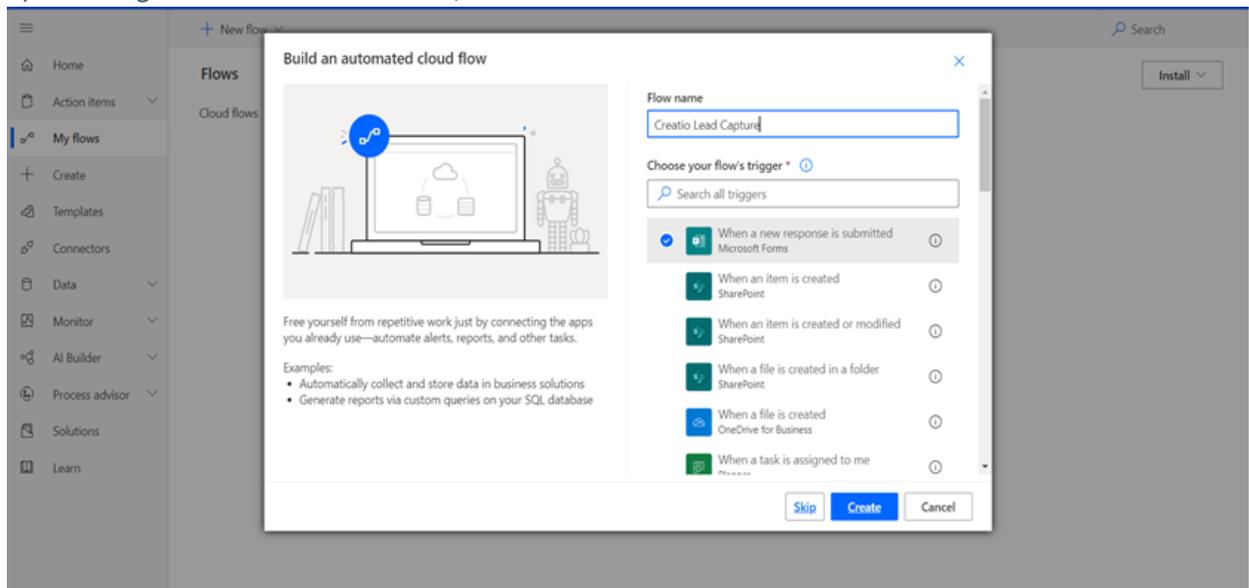
Step 3: Create Automated Microsoft Flow to capture a Lead into Creatio.

1. Go to the following link <https://flow.microsoft.com/> and select Power Automate to create flows.
2. Select My flows in the left panel.
3. Click on New flow and select Automated cloud flow.
4. Provide a name for the custom created flow.
5. *Select your Flows trigger. Kindly choose the values as “When a new response is submitted”.
6. Click on create.

a) Flow creation,

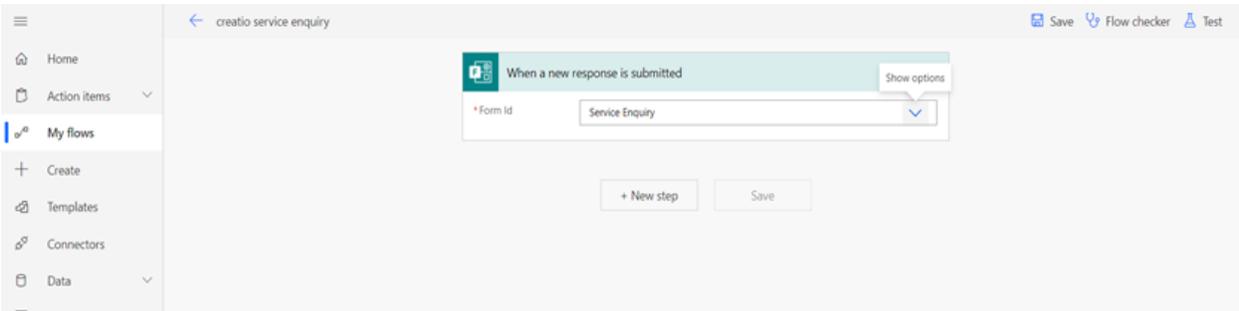


b) Building an automated cloud flow,



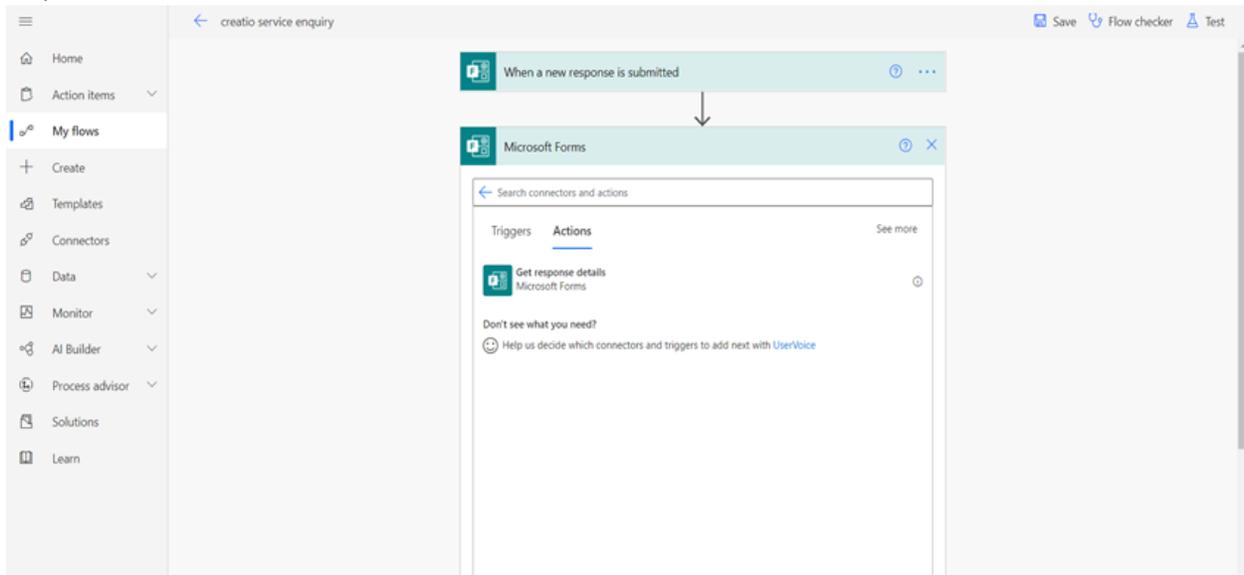
Step 4: Setting Up automated process flow to insert the record into Creatio.

1. Select the Form Response you wanted to capture form the dropdown that you have created in Step 1 & 2.

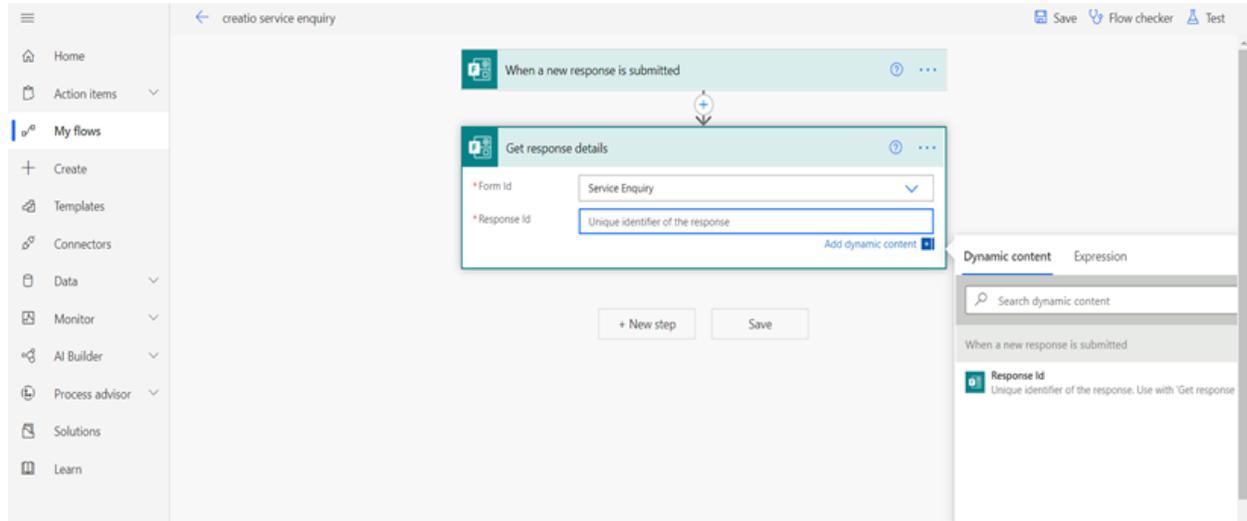


2. Click on New Step,

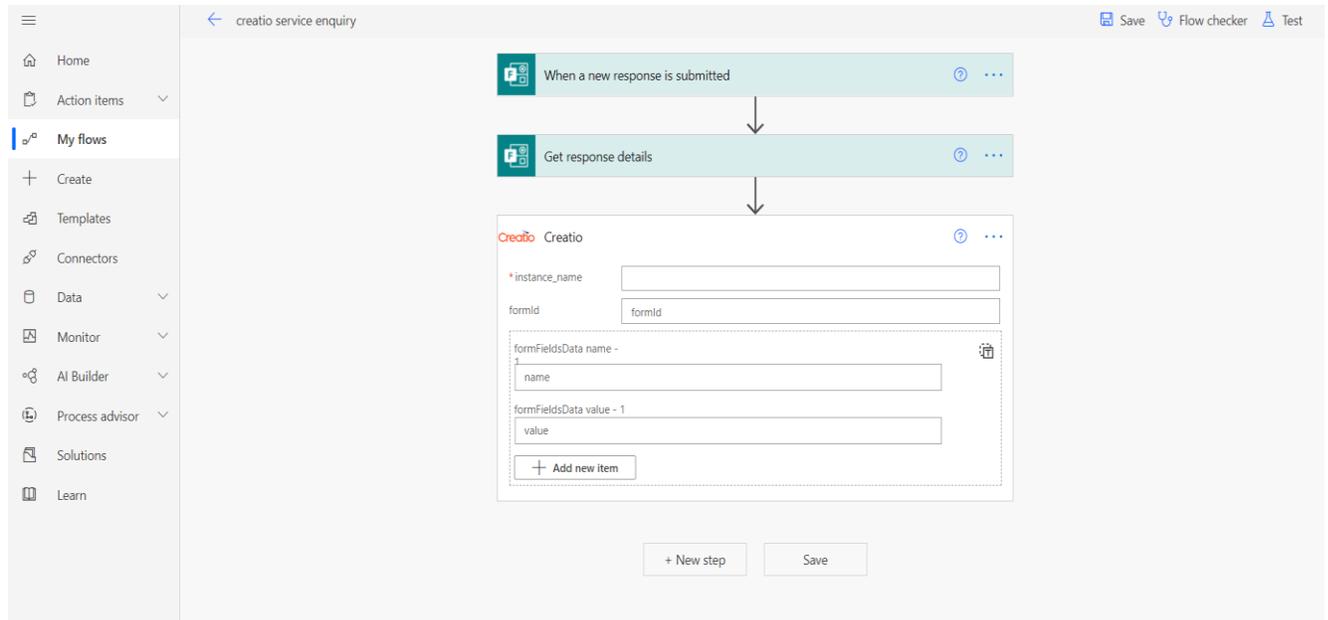
Search for Forms and select the Forms in the result and select the Get response details to receive the response details of the submitted form.



3. Select the Form id as the form that you have created and the provide the response Id selected from the dynamic content. Then, Click on Next Step.



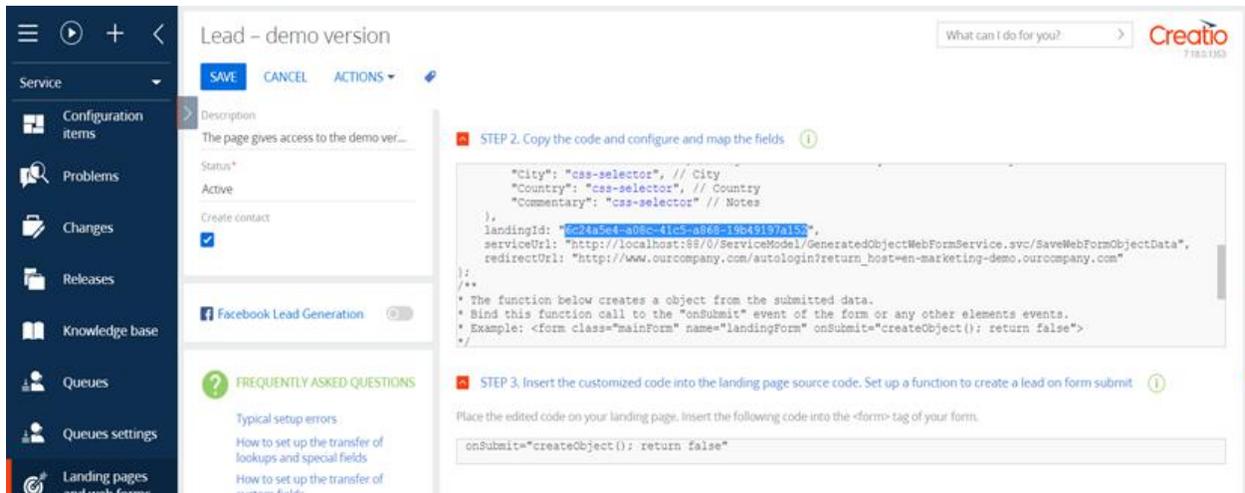
4. Select the Creatio connector from the custom tab and select Creatio in the Action tab too.



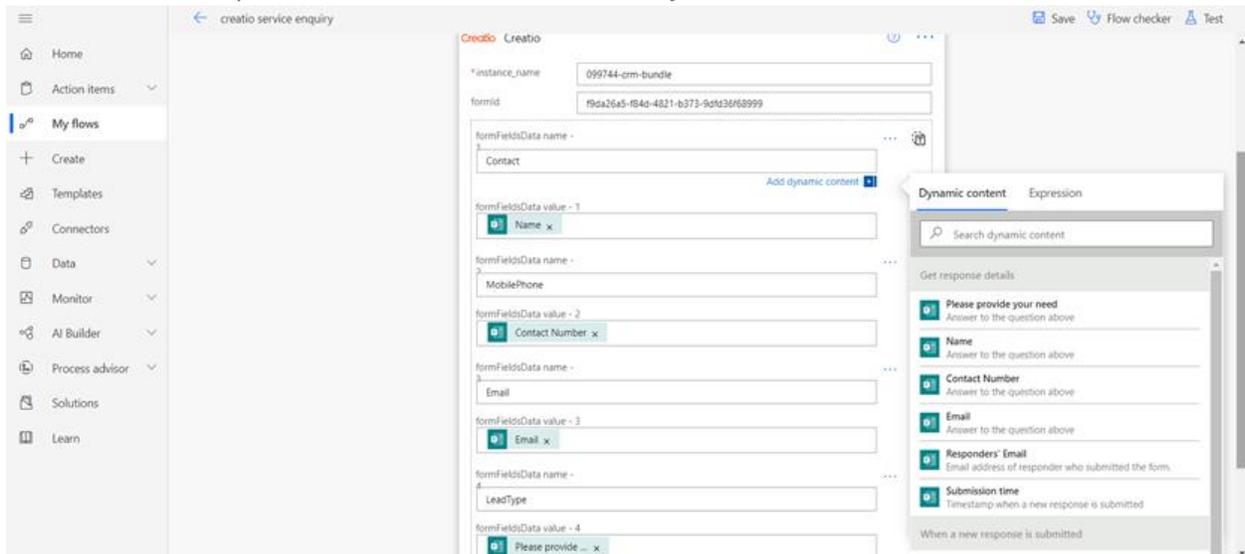
A Custom Creatio connector is added to the automated flow.

Note:

1. Instance_Name: Domain name of the source Creatio site.
2. formid: ID of the New landing page created in Creatio (Step 2). ID, can be found here (Step 2)



5. Bind the form response to the Fields of the Creatio Object and click on save.

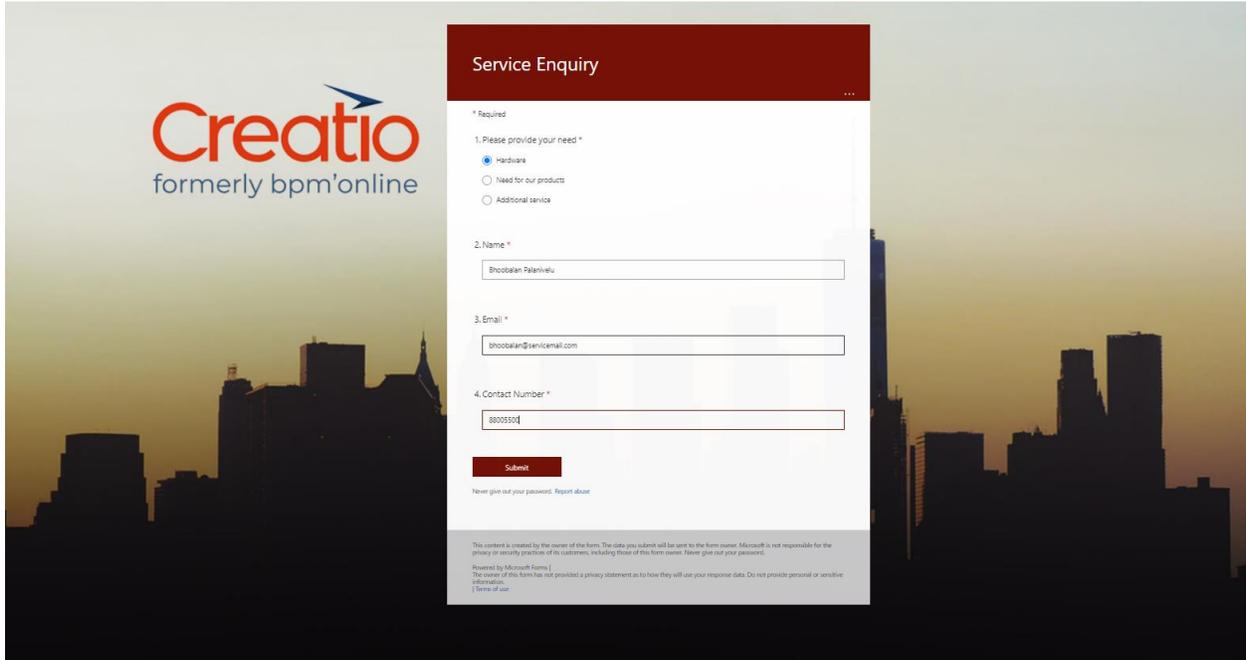


NOTE: The Creatio object field name should be provided in formFieldsData name and dynamic response is given to corresponding formFieldsData value to map the field values of Microsoft forms to the field of Creatio object.

Step 5: Lead creation.

1. The target audience/user submits the Microsoft Form.
2. Automated flow process is triggered in Power Automate.
3. Collect the response from the submitted form and then Creatio connector is executed which insert data into Creatio object.

Form Submission,



Service Enquiry

* Required

1. Please provide your need *

Hardware

Need for our products

Additional service

2. Name *

Bhobalan Palaniyelu

3. Email *

bhobalan@servicemail.com

4. Contact Number *

8800501

Submit

Never give out your password. Report abuse

This content is created by the owner of the form. The data you submit will be sent to the form owner. Microsoft is not responsible for the privacy or security practices of its customers, including those of this form owner. Please give out your password.
Powered by Microsoft Forms | The owner of this form has not provided a privacy statement as to how they will use your response data. Do not provide personal or sensitive information.
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Note: Form fields are entered corresponding to the field type.

Service Enquiry

 Thanks!

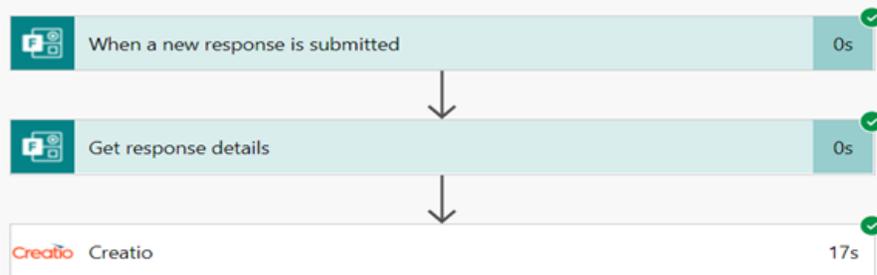
Your response was submitted.

[Submit another response](#)

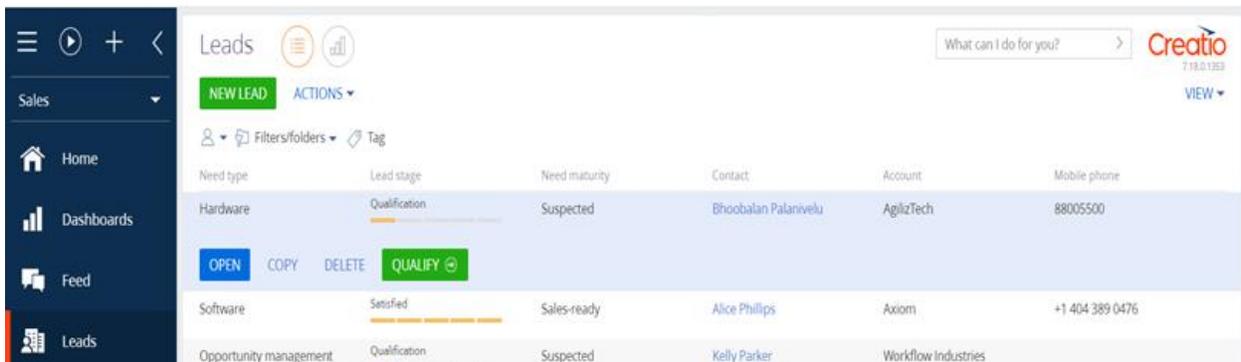
Create my own form

Powered by Microsoft Forms |
The owner of this form has not provided a privacy statement as to how they will use your response data. Do not provide personal or sensitive information.
| [Terms of use](#)

Microsoft Automated Cloud flow execution,



Lead Created in Creatio CRM



Need type	Lead stage	Need maturity	Contact	Account	Mobile phone
Hardware	Qualification	Suspected	Bhoobalan Palanivelu	AgilizTech	88005500
Software	Satisfied	Sales-ready	Alice Phillips	Axiom	+1 404 389 0476
Opportunity management	Qualification	Suspected	Kelly Parker	Workflow Industries	