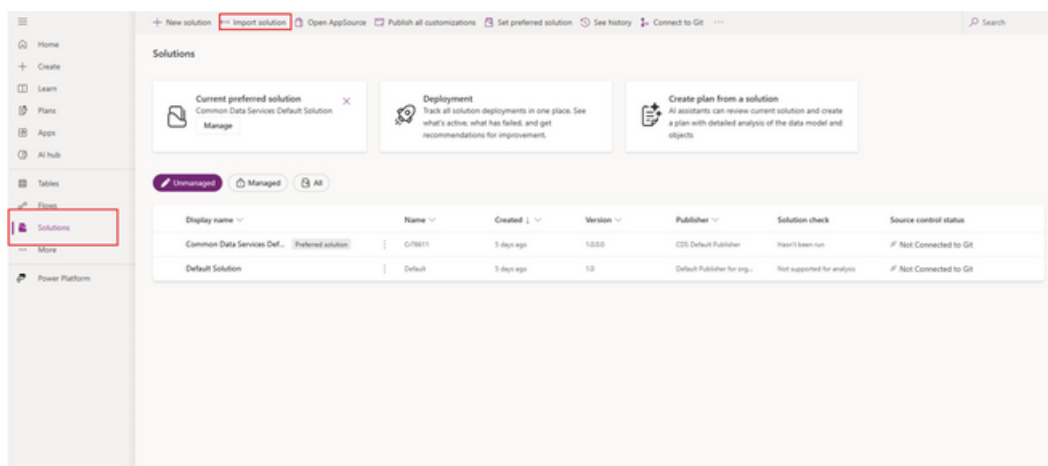# Admin Guide: Deploying the "Creatio Connector to Forms" Solution

This guide outlines the steps for administrators to install, configure, and deploy the Creatio Connector to Forms solution. The deployment includes setting up Power Automate flows, configuring Dataverse tables, and activating a Power Pages portal.
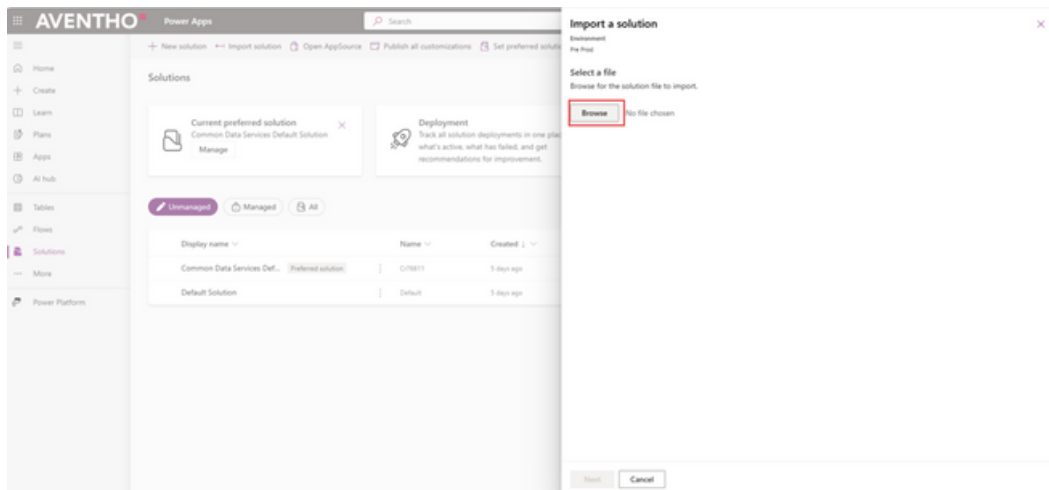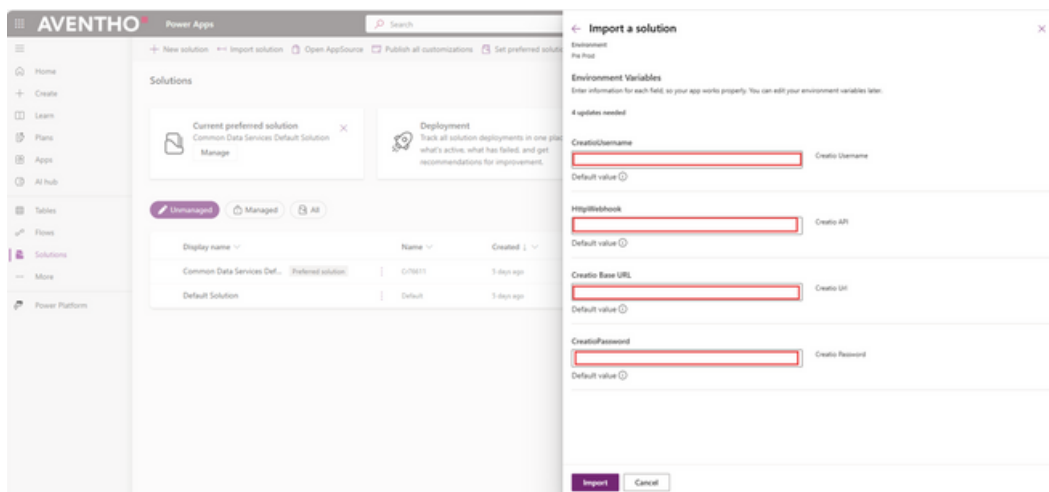
1 **Import the Solution**
- Log in to Power Apps using an administrator account.
- Navigate to Solutions from the left navigation panel.
- Click Import solution.

- Select the provided .zip solution file (Forms to Creatio Connector) and proceed with the import.
- The solution file be provided upon request.

- During the import process, update the default values of the environment variables:
  - Set the Creatio Base URL to match your Creatio instance.
  - Update the Creatio Username and Password used for HTTP authentication.
  - Modify the HTTP Webhook URL as needed for your setup. Click Here to read the article on how to retrieve the webhook
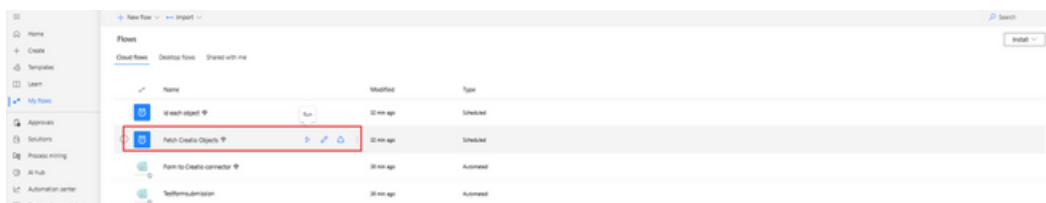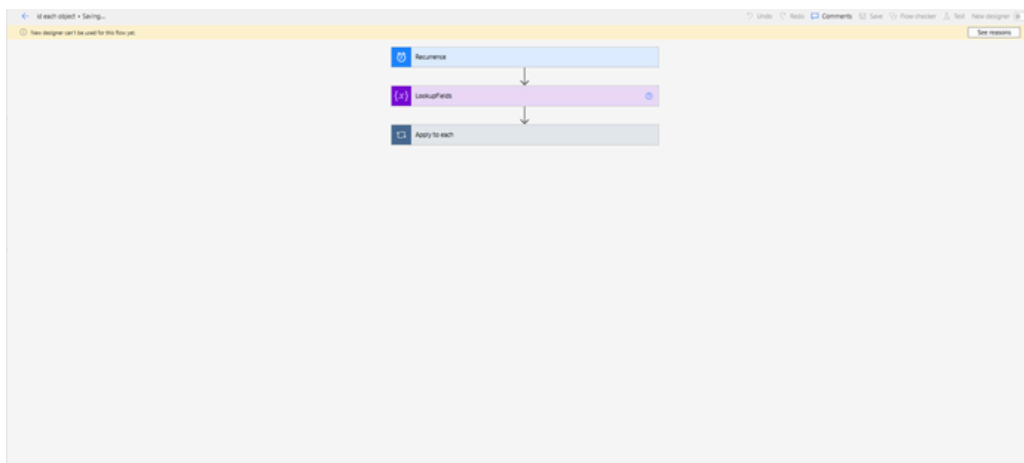

- Wait for the import process to complete successfully.

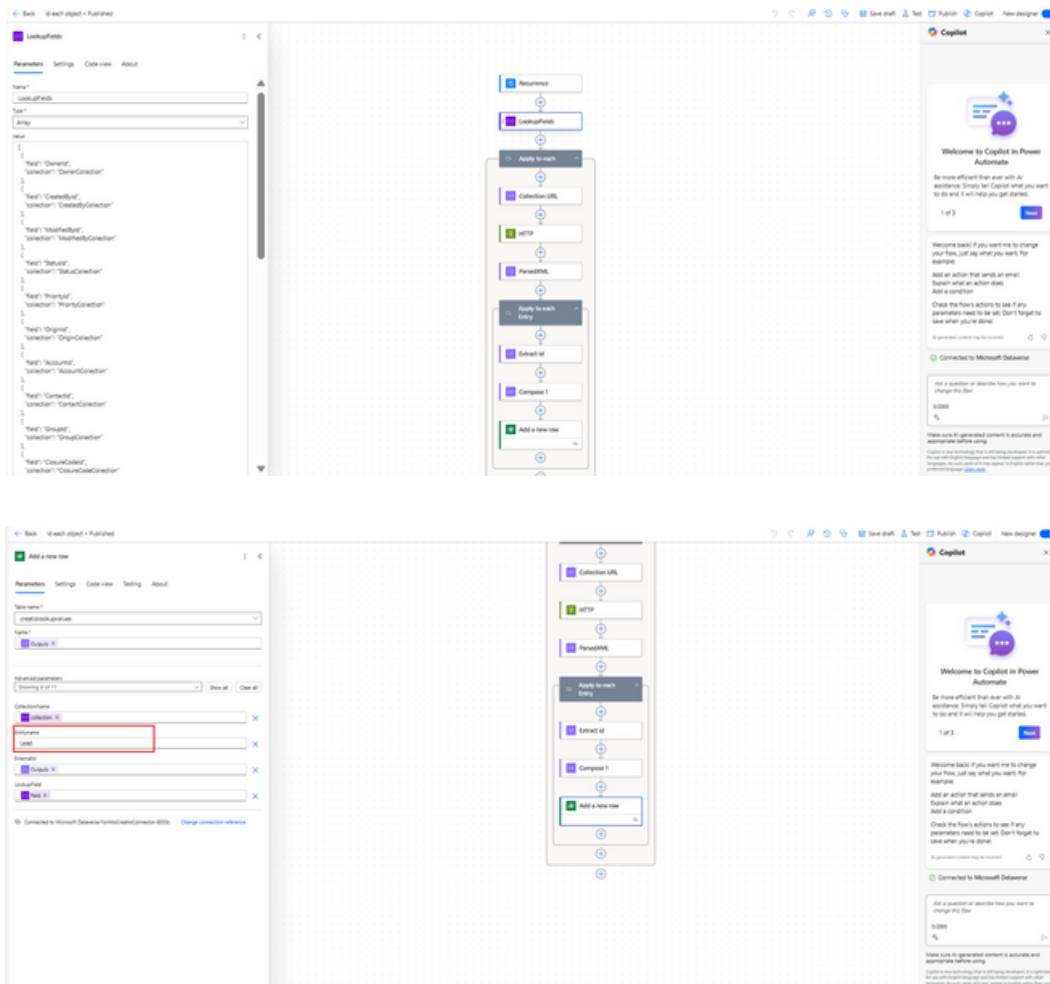**2** **Reconnect and Configure Power Automate Flows**
- After the solution is imported, open <u>Power Automate</u>.
- Locate and open the "Fetch Creatio Objects" flow:
    - Click Run to populate the Creatio object fields table.

- Configure the "ID for Each Object" flow:
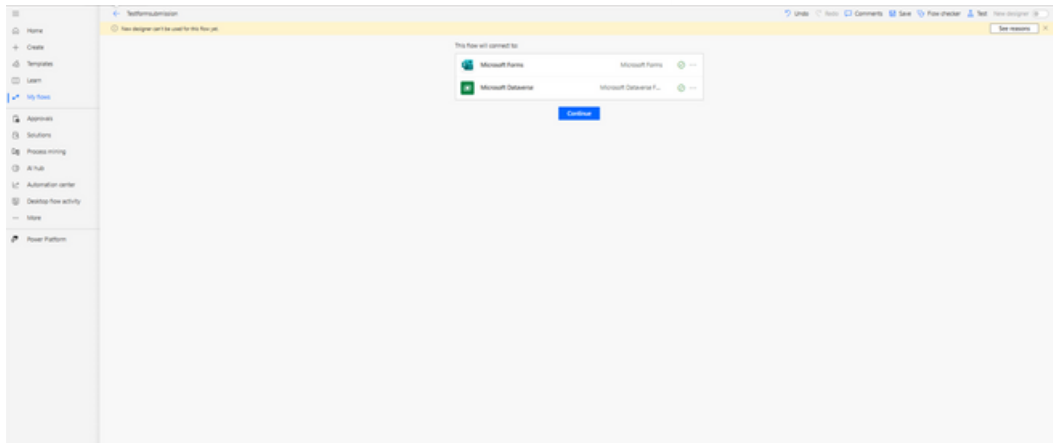   - Open the flow, click Edit, then Save.

    - Update the LookupField and modify the Entity Name for the Add a new row step.

- Run the flow to retrieve lookup values (e.g., for entities such as Contact or Order).
- Refer to the provided .txt file for sample array structures if needed.
- .txt file will be provided with the solution file upon request.

- Open both the Test Form Submission and Form to Creatio Connector flows:
  - Review all connection references (e.g., Microsoft Forms, Dataverse, HTTP).
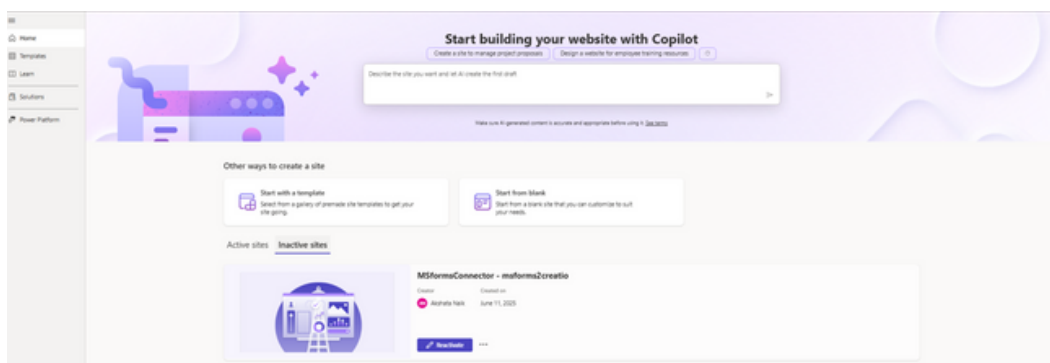
- Click "+ Add new connection" or "Fix connection" as prompted.
- Reconnect using an administrator or service account.
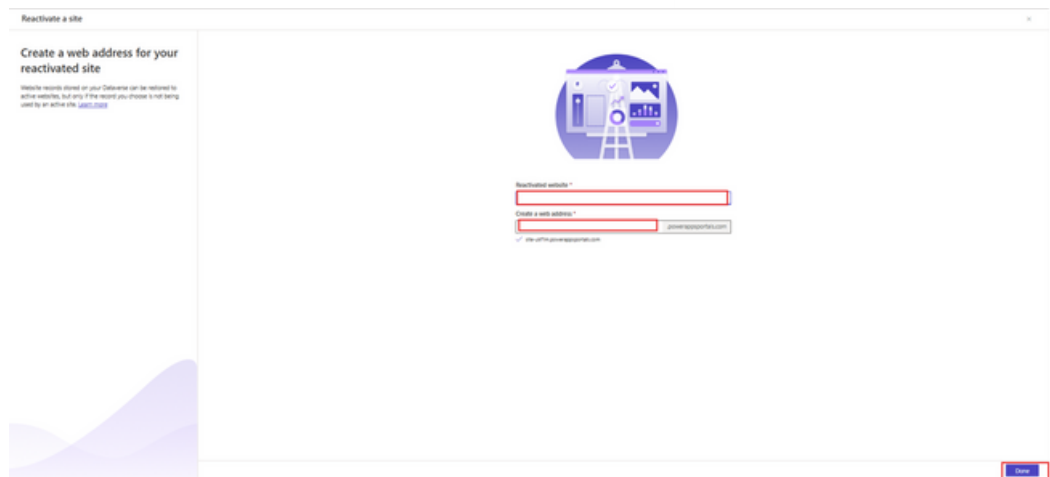- Click Save for each updated flow to apply changes.

3 **Set Up the Power Pages Site**
- In Power Apps, navigate to Power Pages.
- From the list of Inactive Sites, select the connector site and click Reactivate.

- Update the Site Name and Web Address as desired.

- Verify and adjust Authentication and Permissions settings.

4 **Publish the Power Pages Site**

Once all Power Automate flow URLs are correctly configured and saved:
- Go to the Power Pages section in Power Apps.
- Click Sync to ensure all backend and frontend files are up to date.
- Select Publish Site to make the portal live and accessible to end users.

5 **Share Initial Access with End Users**

Once the portal is published and ready:
- Share the URL to the "Forms to Creatio Connector" Power Automate flow with relevant users.
- Share the "Test Form Submission" flow so users can:
  - Connect their Microsoft Form.
  - Generate a sample submission.
  - Visualize and map form fields to Creatio fields.
  - Activate their mappings independently.

What End Users Can Do After Setup

Once everything is set up and users are given access, they can:

- Paste or select their Microsoft Form.
- Map form questions to Creatio fields using the visual interface.
- Submit test responses and activate the mapping without admin support.