

## Install Inselligence connector for Creatio

Inselligence connector for Creatio allow you to analyze your sales information in Creatio, generating powerful insights on the behavior of your pipeline. The app also lets you model your sales data and generate forecasts.

The app has the following key features:

- Unidirectional data transfer from pipelines and deal information to Inselligence.
- Connect Creatio to Inselligence through CRM connection wizard.
- Data auto-update. Change made in Creatio are automatically synced to Inselligence.
- Modeling sales requirements to accomplish desired forecast.

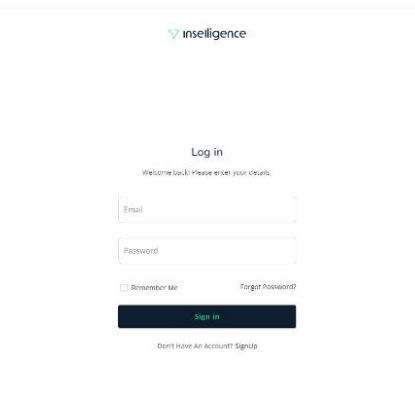
## Install the app

To install the app, follow the instructions in Creatio documentation: [Install apps from the Marketplace.](#)

## Connect the app to Creatio

1. Click on the "Inselligence" app to open it.
2. Login in Inselligence

Please login with your Inselligence credentials. If you don't have an Inselligence account, please Sign Up, complete the registration form and continue with a 30-days free trial. After ending the free trial our sales team contact you to review plans and prices.



inselligence

Log in

Welcome back! Please enter your details.

Email

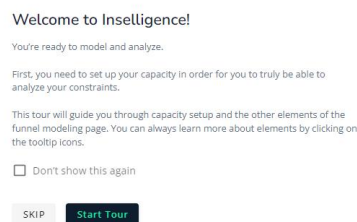
Password

Remember me [Forgot Password?](#)

[Don't Have An Account? Sign Up](#)

### 3. Welcome to Inselligence

Start Inselligence tour and follow each step to get a great experience.



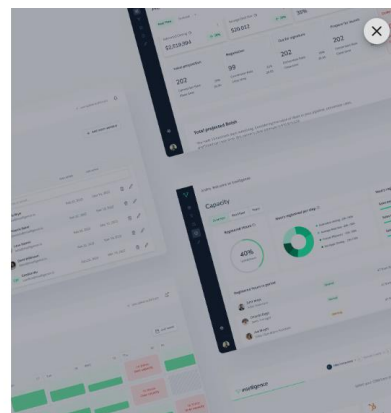
Welcome to Inselligence!

You're ready to model and analyze.

First, you need to set up your capacity in order for you to truly be able to analyze your constraints.

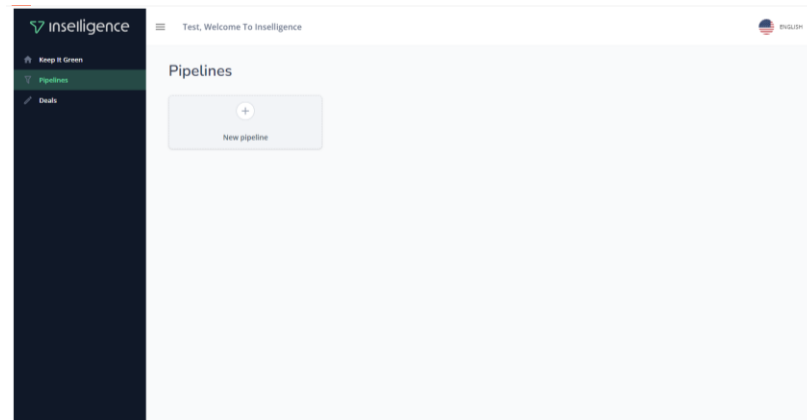
This tour will guide you through capacity setup and the other elements of the funnel modeling page. You can always learn more about elements by clicking on the tooltip icons.

Don't show this again



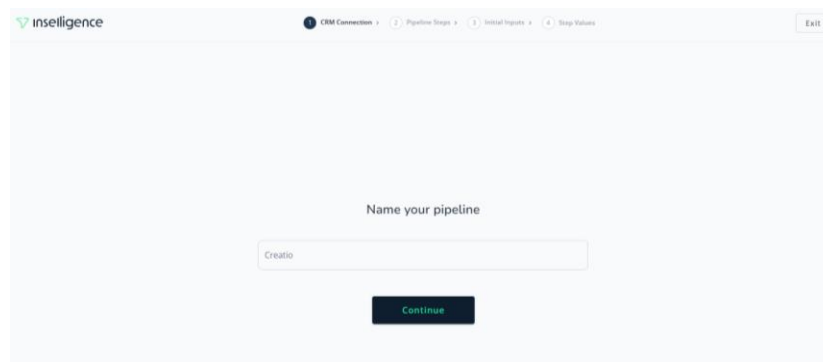
#### 4. Import your pipeline

Select in the main menu, pipelines option and click on New Pipeline



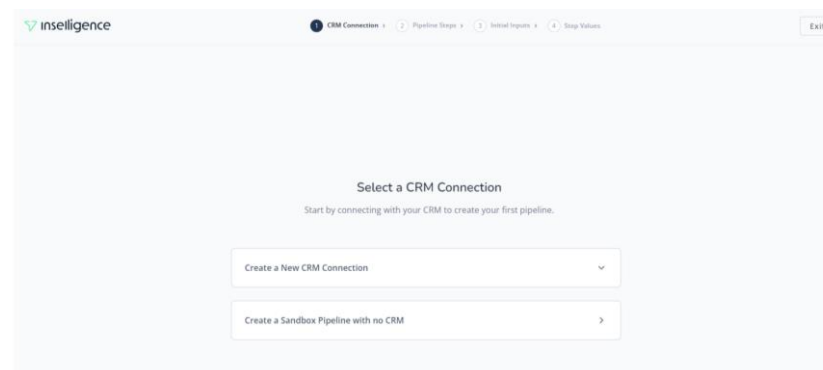
#### 5. Follow CRM connection wizard

Please name your CRM connection according to your business.



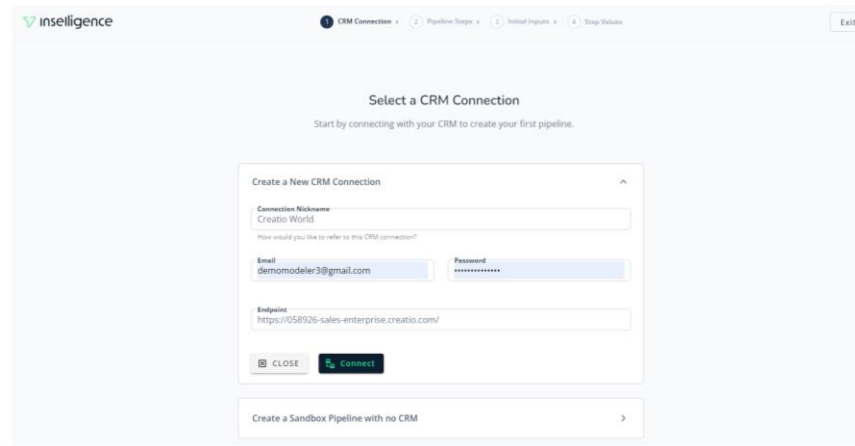
#### 6. Create a CRM connection

Please choose the option "Select CRM from list" and Select Creatio



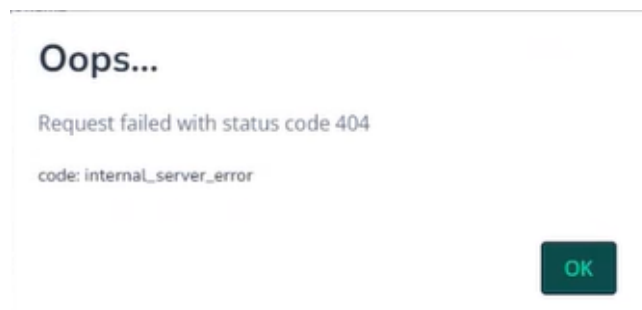
## 7. Create a new CRM connection

Complete the name of the connection, username, and password and the Creatio endpoint to generate the connection.



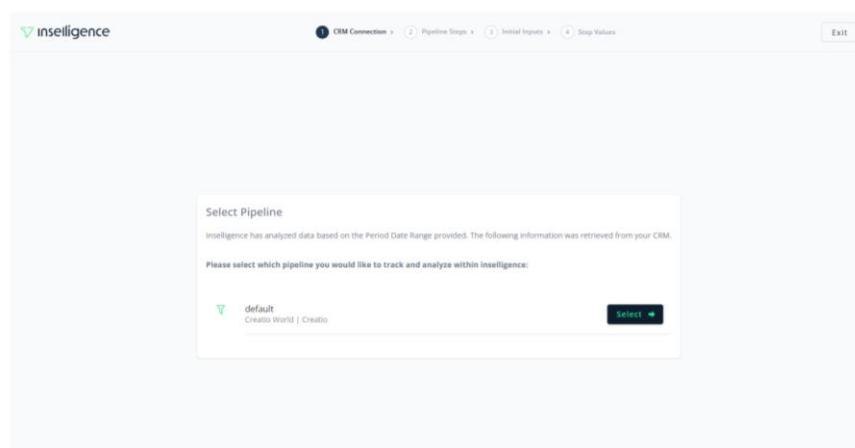
The screenshot shows the 'inselligence' interface with a breadcrumb trail: CRM Connection > Pipeline Steps > Initial Inputs > Step Values. An 'EXIT' button is in the top right. The main heading is 'Select a CRM Connection' with the subtext 'Start by connecting with your CRM to create your first pipeline.' Below this is a 'Create a New CRM Connection' dialog box. It contains a 'Connection Nickname' field with 'Creatio World', a note 'How would you like to refer to this CRM connection?', an 'Email' field with 'demomodeler3@gmail.com', a 'Password' field with masked characters, and an 'Endpoint' field with 'https://058926-sales-enterprise.creatio.com/'. At the bottom of the dialog are 'CLOSE' and 'CONNECT' buttons. Below the dialog is a link: 'Create a Sandbox Pipeline with no CRM' with a right-pointing arrow.

**\*If an error with Code 404 is thrown, refer to the installation *note 1*.**



## 8. Select Pipeline

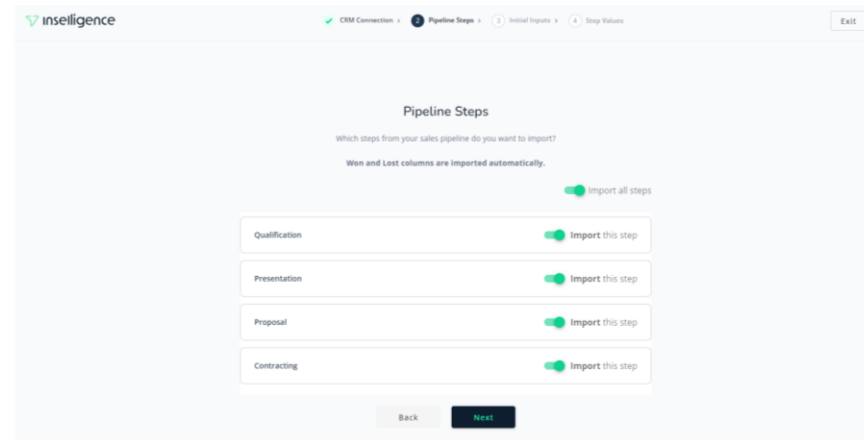
Select the pipeline that you want to import.



The screenshot shows the 'inselligence' interface with the same breadcrumb trail and 'EXIT' button. The main heading is 'Select Pipeline' with the subtext 'inselligence has analyzed data based on the Period Date Range provided. The following information was retrieved from your CRM.' Below this is the instruction 'Please select which pipeline you would like to track and analyze within inselligence:'. A list shows a single pipeline: 'default' with subtext 'Creatio World | Creatio'. A 'Select' button with a right-pointing arrow is to the right of the list.

## 9. Select Pipeline Steps

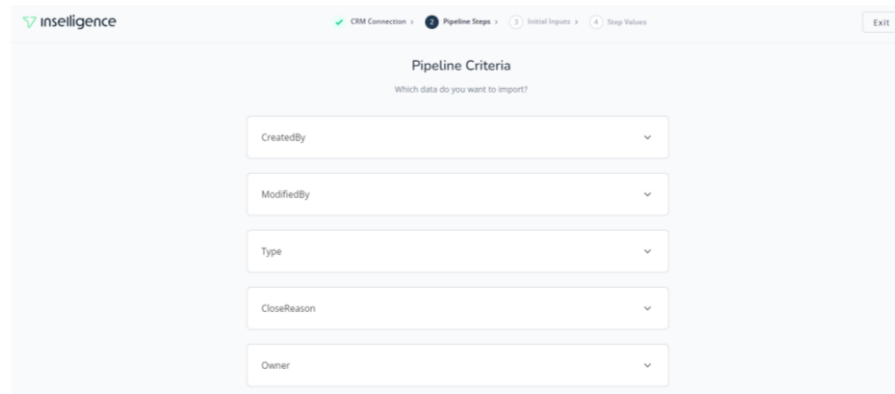
Select which steps of your pipeline you want to import.



The screenshot shows the 'Pipeline Steps' configuration screen. At the top, there is a breadcrumb trail: 'CRM Connection > Pipeline Steps > Initial Inputs > Step Values'. Below this, the title 'Pipeline Steps' is centered, followed by the question 'Which steps from your sales pipeline do you want to import?' and a note: 'Won and Lost columns are imported automatically.' There is a toggle switch for 'Import all steps' which is currently turned on. Below this, there are four rows, each representing a pipeline step: 'Qualification', 'Presentation', 'Proposal', and 'Contracting'. Each row has a toggle switch and the text 'Import this step', all of which are currently turned on. At the bottom, there are 'Back' and 'Next' buttons.

## 10. Select Pipeline Criteria

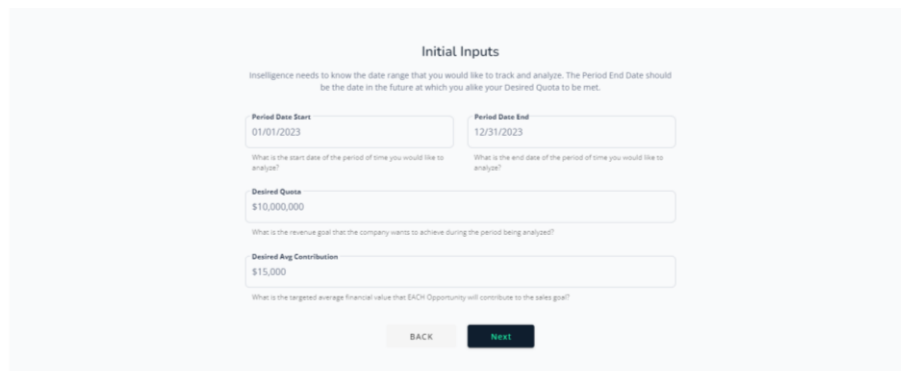
Select the criteria that want to have with more detailed in your sales flow.



The screenshot shows the 'Pipeline Criteria' configuration screen. At the top, there is a breadcrumb trail: 'CRM Connection > Pipeline Steps > Initial Inputs > Step Values'. Below this, the title 'Pipeline Criteria' is centered, followed by the question 'Which data do you want to import?'. There are five dropdown menus for selecting criteria: 'CreatedBy', 'ModifiedBy', 'Type', 'CloseReason', and 'Owner'. At the bottom, there are 'Back' and 'Next' buttons.

## 11. Complete initial inputs

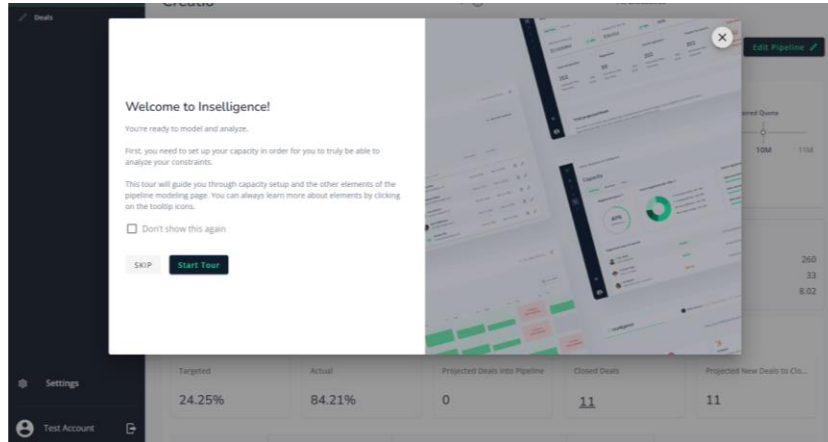
Complete initial inputs according with your business parameters.



The screenshot shows the 'Initial Inputs' configuration screen. At the top, there is a title 'Initial Inputs' and a paragraph: 'inselligence needs to know the date range that you would like to track and analyze. The Period End Date should be the date in the future at which you alike your Desired Quota to be met.' Below this, there are four input fields: 'Period Data Start' (01/01/2023), 'Period Data End' (12/31/2023), 'Desired Quota' (\$10,000,000), and 'Desired Avg Contribution' (\$15,000). Each field has a small text prompt below it: 'What is the start date of the period of time you would like to analyze?', 'What is the end date of the period of time you would like to analyze?', 'What is the revenue goal that the company wants to achieve during the period being analyzed?', and 'What is the targeted average financial value that EACH Opportunity will contribute to the sales goal?'. At the bottom, there are 'BACK' and 'Next' buttons.

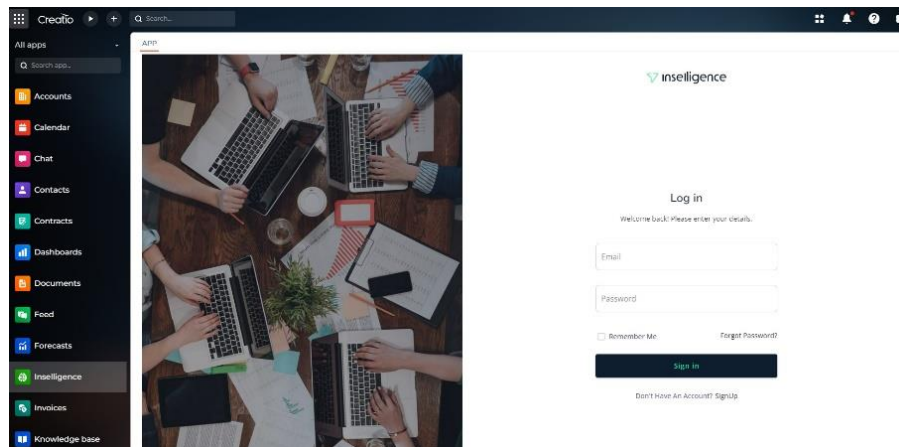
## 12. Welcome to Inselligence

This tour will guide you through capacity setup and the other elements of the pipeline modeling page. You can always learn more about elements by clicking on the tooltip icons.

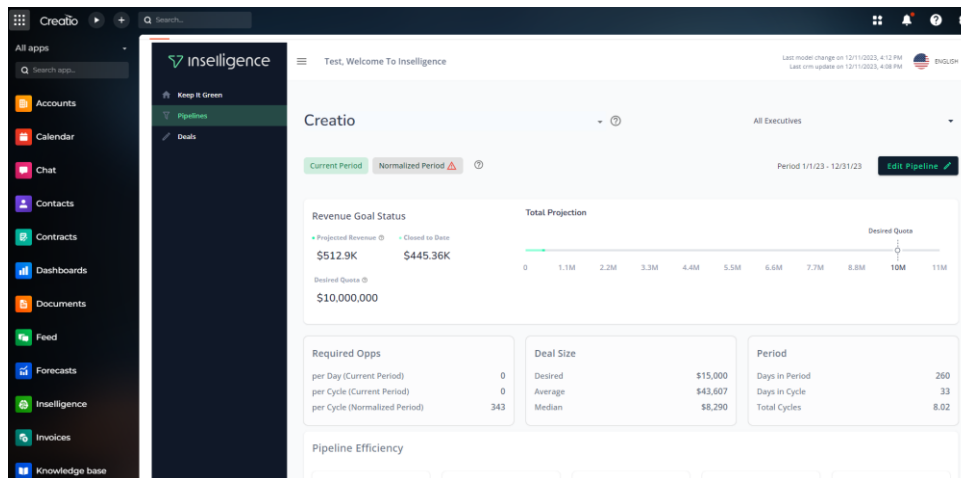


## 13. Creatio pipeline in Inselligence

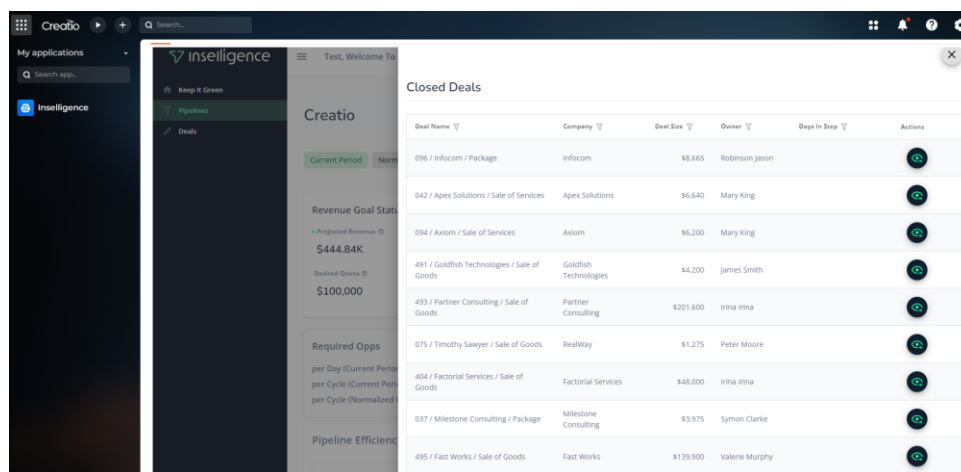
When you connect your Creatio CRM to Inselligence you can access to CRM information. To login to Inselligence into Creatio, please search Inselligence in the app section, click on Inselligence app and Login.



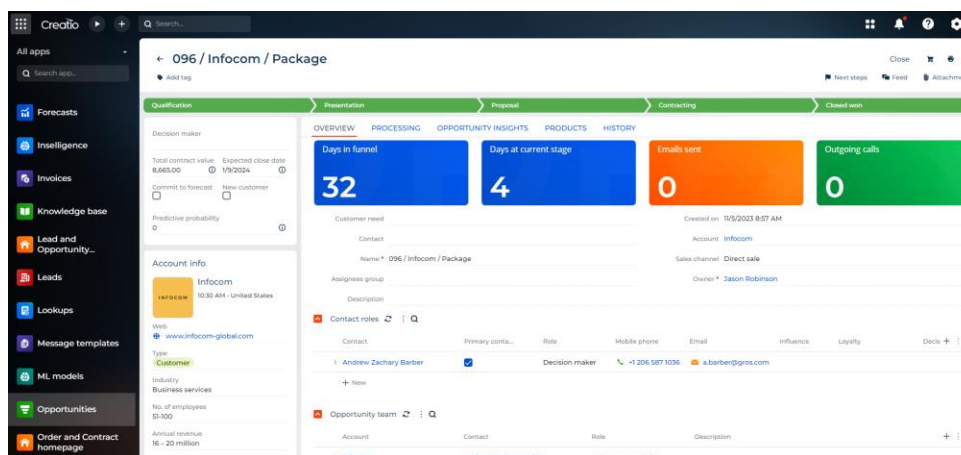
In the home page of Inselligence you can review/model this information in the Pipeline Detail page.



If you want to review the details of the opportunities, you can click on green eye to go to Creatio and check the information.



Deal Name	Company	Deal Size	Owner	Days in Step	Actions
096 / Infocom / Package	Infocom	\$8,865	Robinson Jason		
042 / Apex Solutions / Sale of Services	Apex Solutions	\$6,640	Mary King		
034 / Axion / Sale of Services	Axion	\$6,200	Mary King		
491 / Goldfish Technologies / Sale of Goods	Goldfish Technologies	\$4,200	James Smith		
493 / Partner Consulting / Sale of Goods	Partner Consulting	\$201,600	Irina Irina		
075 / Timothy Sawyer / Sale of Goods	RealWay	\$1,275	Peter Moore		
404 / Factorial Services / Sale of Goods	Factorial Services	\$48,000	Irina Irina		
037 / Milestone Consulting / Package	Milestone Consulting	\$3,975	Symon Clarke		
405 / Fast Works / Sale of Goods	Fast Works	\$139,900	Valerie Murphy		



**096 / Infocom / Package**

Progress: Qualification → Presentation → Proposal → Contracting → Closed won

- Days in funnel: 32
- Days at current stage: 4
- Emails sent: 0
- Outgoing calls: 0

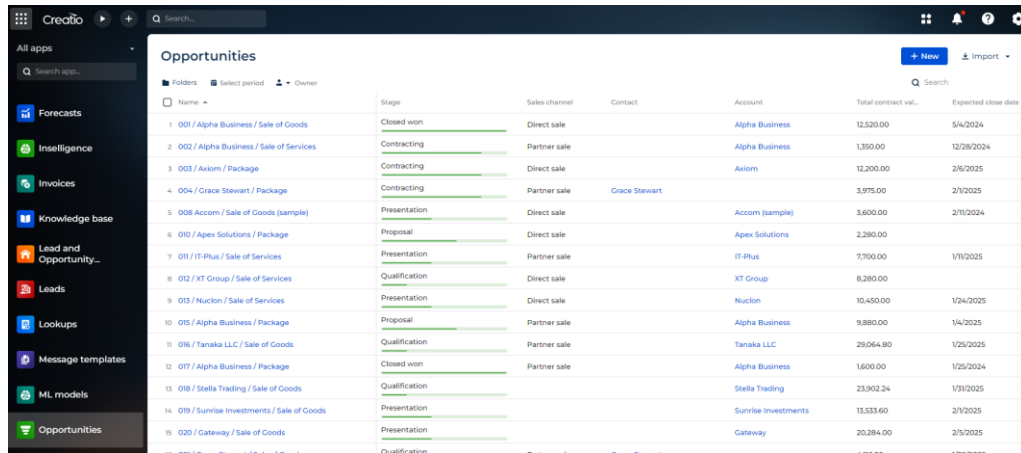
**Account Info: Infocom**

- Total contract value: \$8,865.00
- Expected close date: 1/9/2024
- Commit to forecast:  New customer:
- Predictive probability:
- Website: www.infocom-global.com
- Type: Customer
- Industry: Business services
- No. of employees: 50,300
- Annual revenue: 16 - 20 million

**Details:**

- Created on: 11/5/2023 8:57 AM
- Account: Infocom
- Sales channel: Direct sale
- Owner: Jason Robinson
- Assignees group: Andrew Zachary Barber (Decision maker)
- Contact roles: Andrew Zachary Barber (Sales representative)

All the information (steps, amounts and owners) that you change in Creatio will be update online in Inselligence.

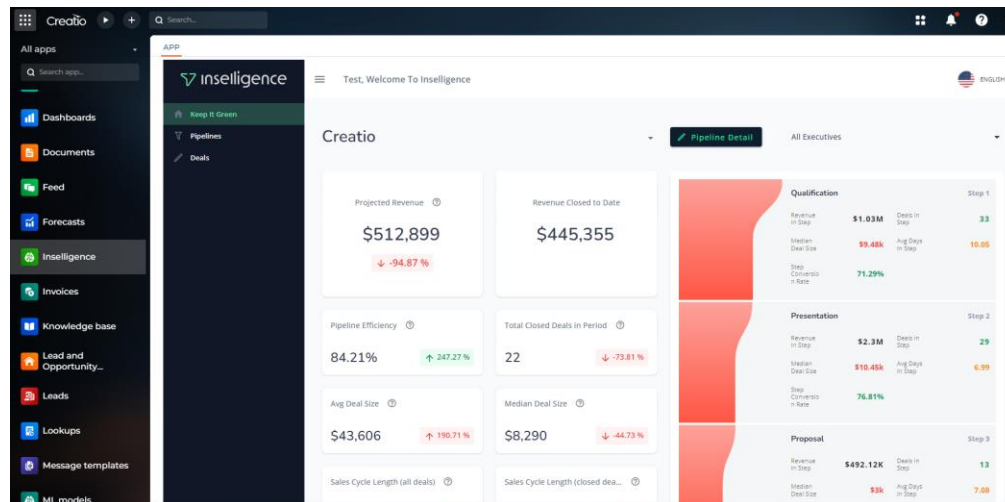


Name	Stage	Sales channel	Contact	Account	Total contract val.	Expected close date
001 / Alpha Business / Sale of Goods	Closed won	Direct sale		Alpha Business	12,520.00	5/4/2024
002 / Alpha Business / Sale of Services	Contracting	Partner sale		Alpha Business	1,350.00	12/28/2024
003 / Axiom / Package	Contracting	Direct sale		Axiom	12,200.00	2/6/2025
004 / Grace Stewart / Package	Contracting	Partner sale	Grace Stewart		3,975.00	2/7/2025
008 Accom / Sale of Goods (sample)	Presentation	Direct sale		Accom (sample)	3,600.00	2/7/2024
010 / Apex Solutions / Package	Proposal	Direct sale		Apex Solutions	2,280.00	
011 / IT-Plus / Sale of Services	Presentation	Partner sale		IT-Plus	7,700.00	1/7/2025
012 / XT Group / Sale of Services	Qualification	Direct sale		XT Group	8,280.00	
013 / Nuclon / Sale of Services	Presentation	Direct sale		Nuclon	10,450.00	1/24/2025
015 / Alpha Business / Package	Proposal	Partner sale		Alpha Business	9,880.00	1/4/2025
016 / Tanaka LLC / Sale of Goods	Qualification	Partner sale		Tanaka LLC	29,064.80	1/25/2025
017 / Alpha Business / Package	Closed won	Partner sale		Alpha Business	1,600.00	1/25/2024
018 / Stella Trading / Sale of Goods	Qualification			Stella Trading	23,902.24	1/31/2025
019 / Sunrise Investments / Sale of Goods	Presentation			Sunrise Investments	13,533.60	2/7/2025
020 / Gateway / Sale of Goods	Presentation			Gateway	20,284.00	2/5/2025
021 / Grace Stewart / Sale of Goods	Qualification			Grace Stewart	2,100.00	1/28/2025

Inselligence take the information and show to the user in a sophisticated dashboard the evolution of their business and thus effectively monitor the daily activity of their sales team through different KPIs that helps to the user to understand the real health of their sales pipeline.

## 14. Keep it Green

In the KIG screen, you can monitor your daily activities by analyzing specific process variables to create the visibility needed to know where the organization is in relation to its goal.

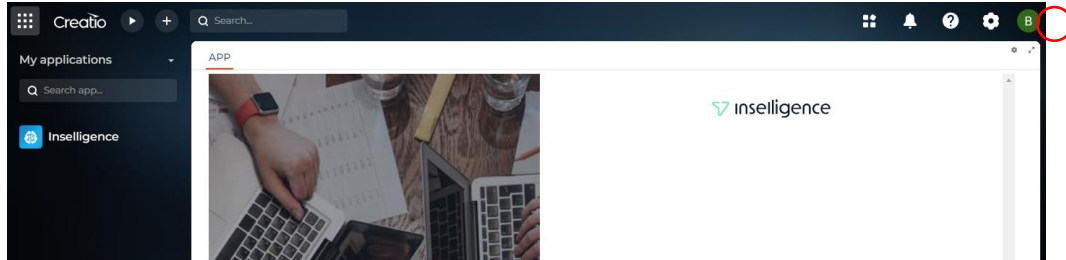


### Note 1:

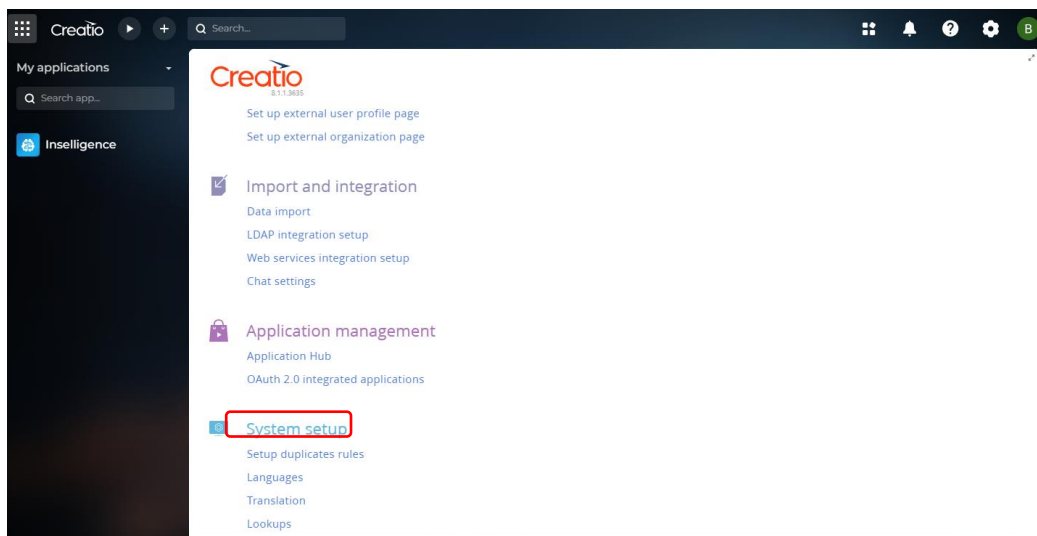
If error 404 is generated, it is most pertinent to recompile the intelligence packages of the Creatio workspace. To do this, follow the next steps:"



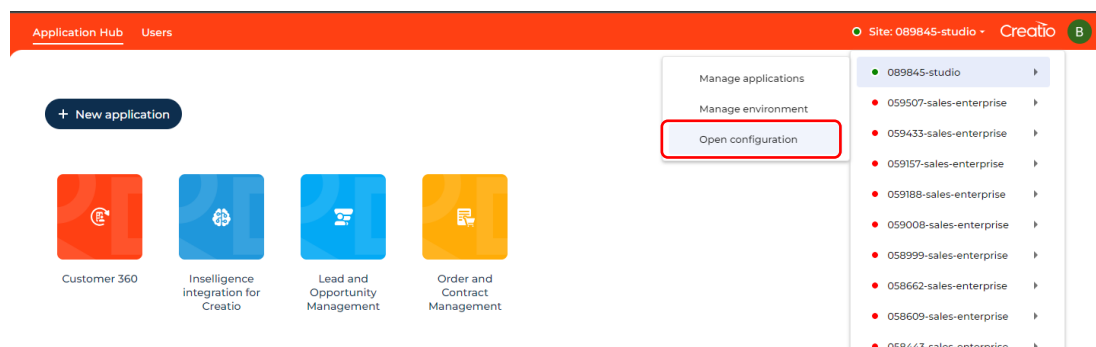
## 1. Access Settings on Creatio.



## 2. Select the 'Application Hub' option.



## 3. Open configuration in the workspace where Inselligence was installed.



## 4. Search and select the Inselligence package from the list of packages.

Configuration Creatio

CLOSE COMPILE ACTIONS

Search by package

Name	Title	Status	Type	Object	Modified on	Package
insilframe	inselligenceframe		Client module		12/19/2023, 10:58:17 AM	insintelligence
insintelligence	inselligence		Object		11/1/2021, 6:24:13 AM	insintelligence
insintelligence_HomePage	inselligence		Client module		12/19/2023, 11:00:25 AM	insintelligence
insinsertSysSettingsPostgre	Sql		SQL script		12/21/2023, 10:55:11 AM	insintelligence
insiprocess_c82b2c9	Send webhooks		Business-process		12/21/2023, 11:14:55 AM	insintelligence
insiservice_2bb3d0e	Webhook 1		Web service		12/19/2023, 10:13:03 AM	insintelligence
insiservice_479e30d	Webhook 3		Web service		12/19/2023, 10:23:16 AM	insintelligence
insiservice_Bd14e1a	Webhook 4		Web service		12/19/2023, 10:27:02 AM	insintelligence
insiservice_c95bf25	Webhook 2		Web service		12/19/2023, 10:17:23 AM	insintelligence
sysAdminUnitinWorkplace_MyApps			Data	SysAdminUnitinW orkplace	9/24/2021, 6:30:37 AM	insintelligence
sysDetail_insintelligence			Data	SysDetail	11/1/2021, 5:38:28 AM	insintelligence
sysimage_Sectionicon_insil intelligence			Data	Sysimage	12/7/2021, 10:37:06 AM	insintelligence
sysModuleEntity_insintelligence			Data	SysModuleEntity	11/1/2021, 5:35:04 ...	insintelligence

5. Compile the package. You can also compile all packages if necessary.

Configuration

CLOSE COMPILE ACTIONS

Compile all

Search by package

Finesse

6. Accept the package compilation process or all selected packages accordingly.

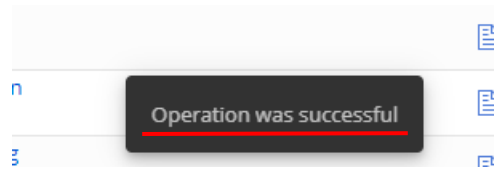
The workspace will be recompiled. Do you wish to proceed?

NO YES

7. Wait for the packages to be compiled.

nePage	Inselligence	Client module
;Postgre		SQL script
	Send webhooks	Business-process
	Webhook 1	Web service
	Webhook 3	Web service

8. Once the loading symbol finishes, the message 'Operation was successful' will appear.



9. Proceed to continue with the configuration of the Pipeline in Inselligence.