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.
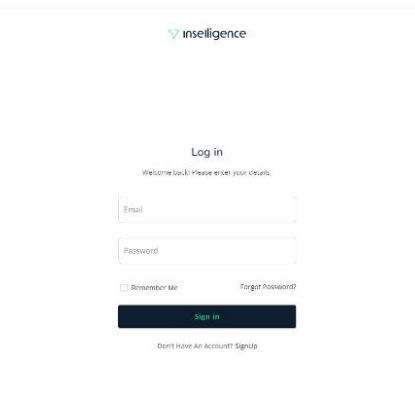- Modeling sales requirements to accomplish desired forecast.

Install the app

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

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.
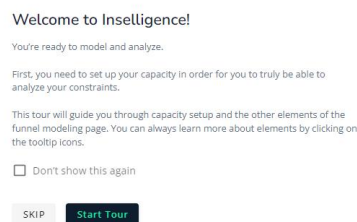
3. **Welcome to Inselligence**

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

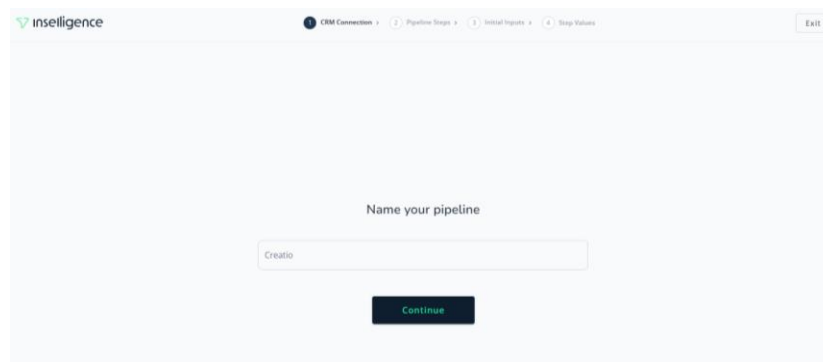## 4. Import your pipeline

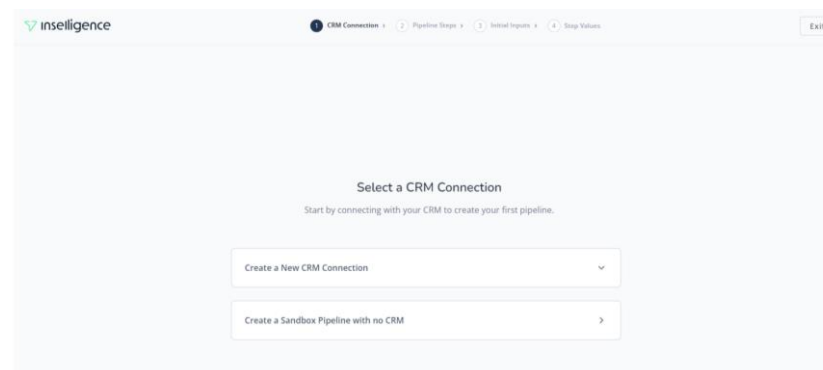Select in the main menu, pipelines option and click on New Pipeline
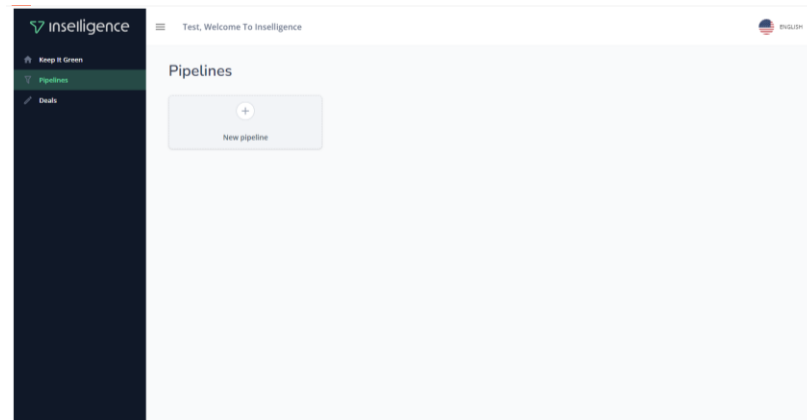
5. Follow CRM connection wizard

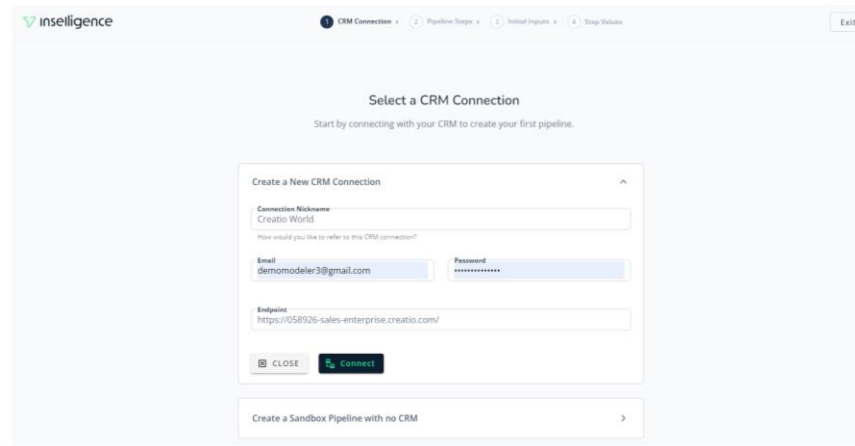Please name your CRM connection according to your business.

6. Create a CRM connection

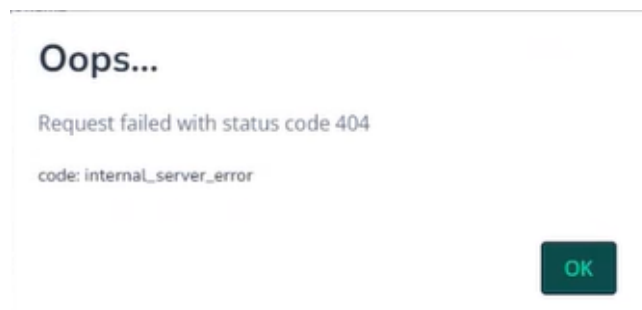Please choose the option "Select CRM from list" and Select Creatio

7. Create a new CRM connection

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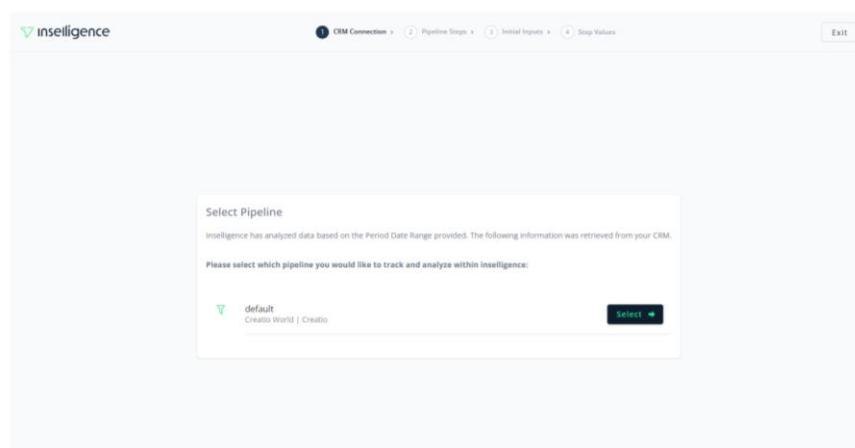

*If an error with Code 404 is thrown, refer to the installation *note 1*.

8. Select Pipeline
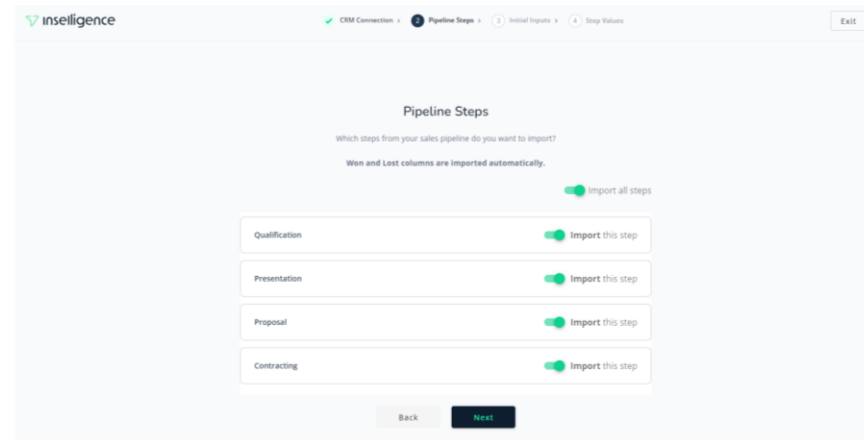
Select the pipeline that you want to import.

9. Select Pipeline Steps
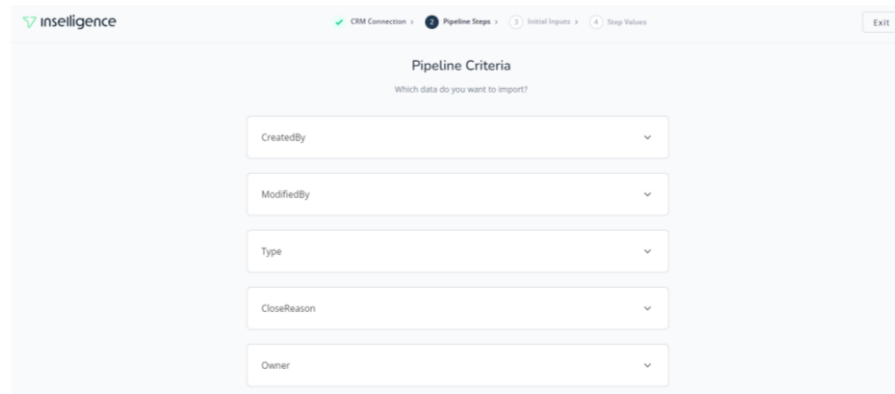
Select which steps of your pipeline you want to import.

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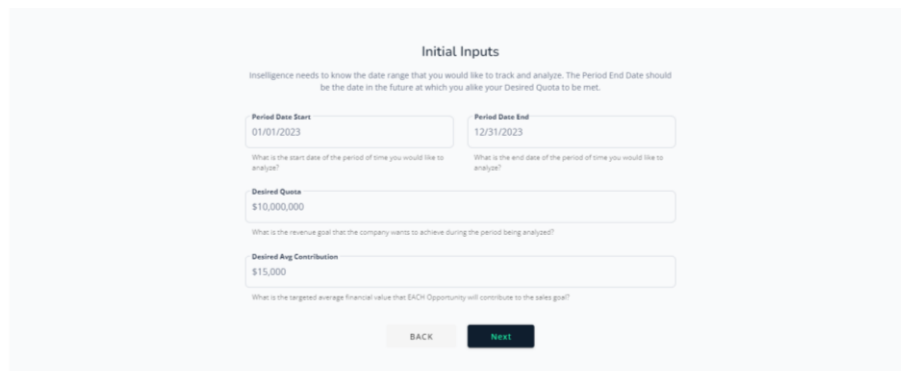
Select the criteria that want to have with more detailed in your sales flow.

11. Complete initial inputs

Complete initial inputs according with your business parameters.

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.
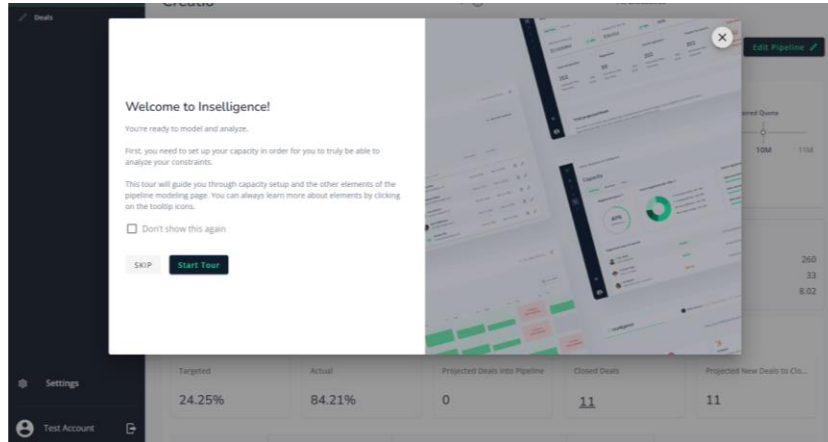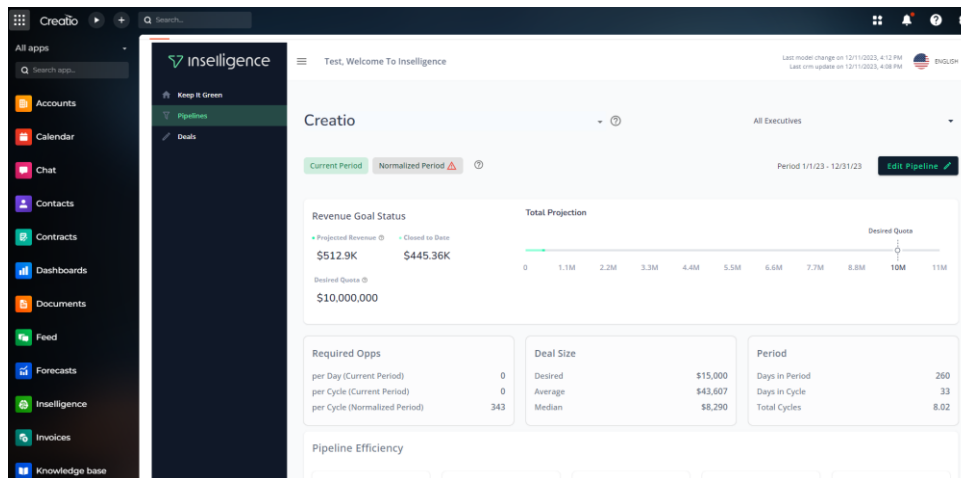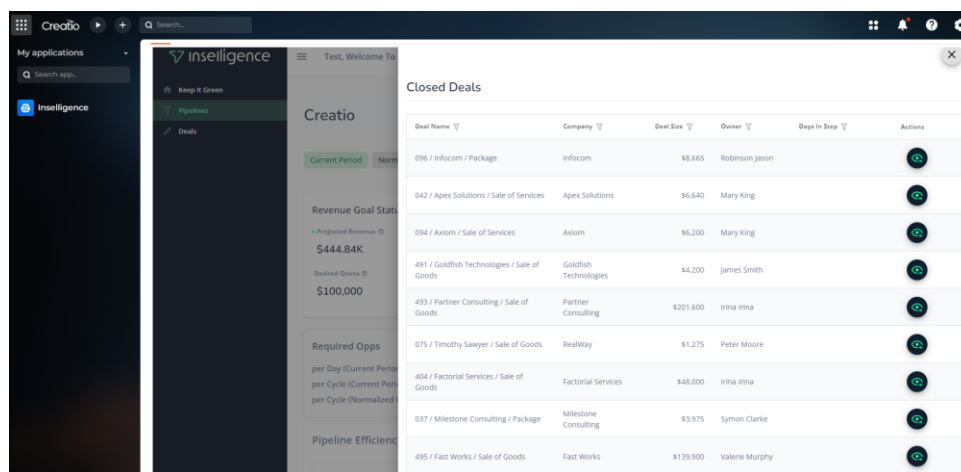

13. Creatio pipeline in Inselligence

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.
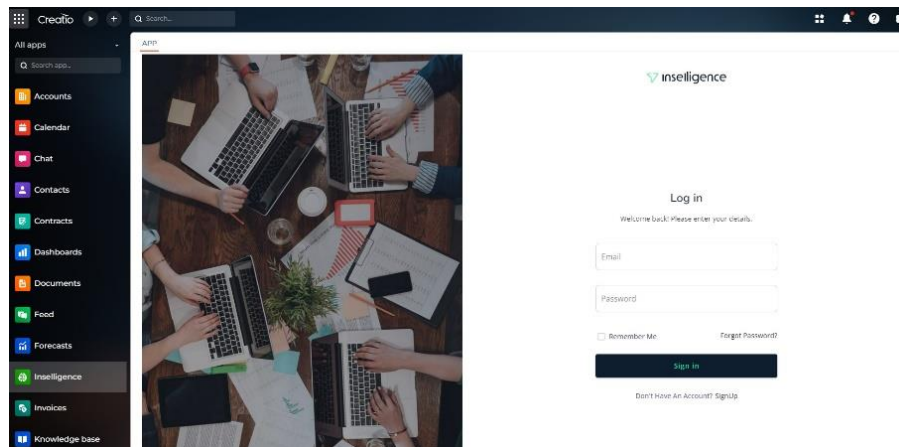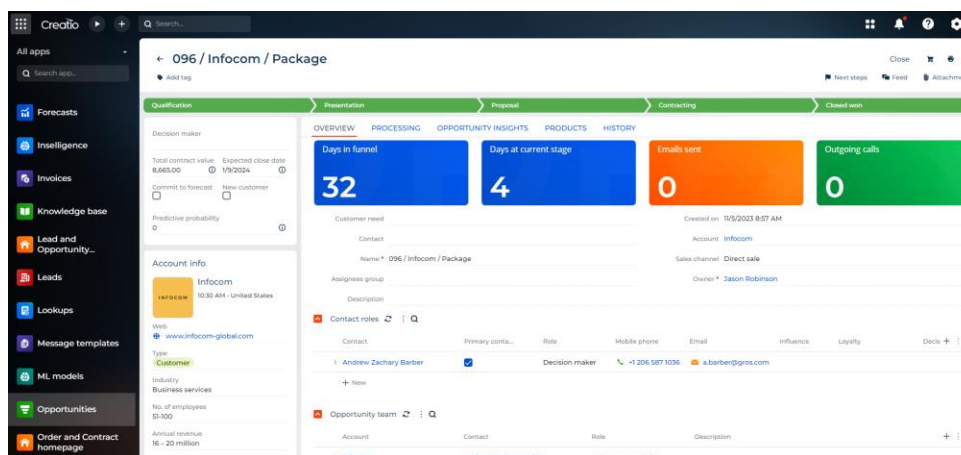

In the home page of Inselligence you can review/model this information in the Pipeline Detail page.

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

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

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 differents KPIs that helps to the user to understand the real health of their sales pipeline.

14. Keep it Green

IIn 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.
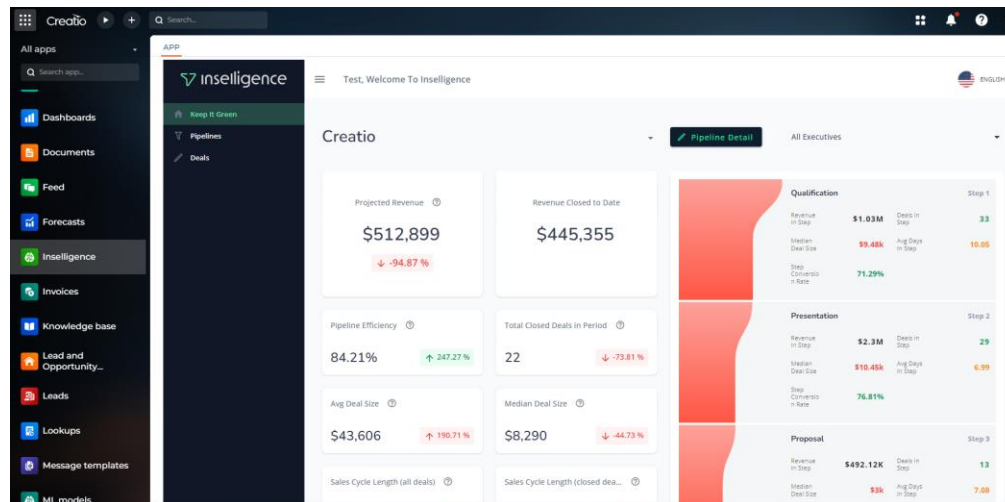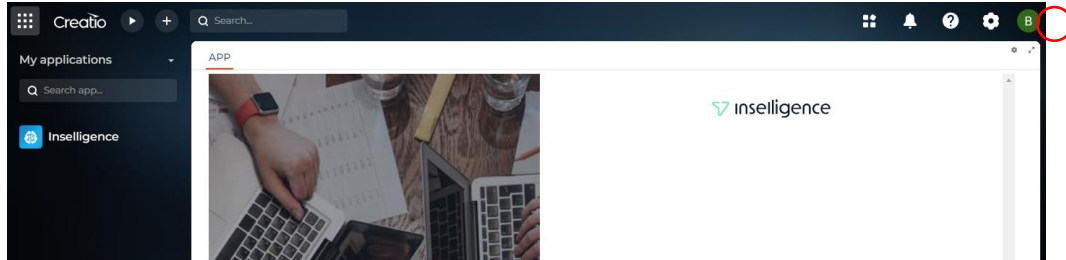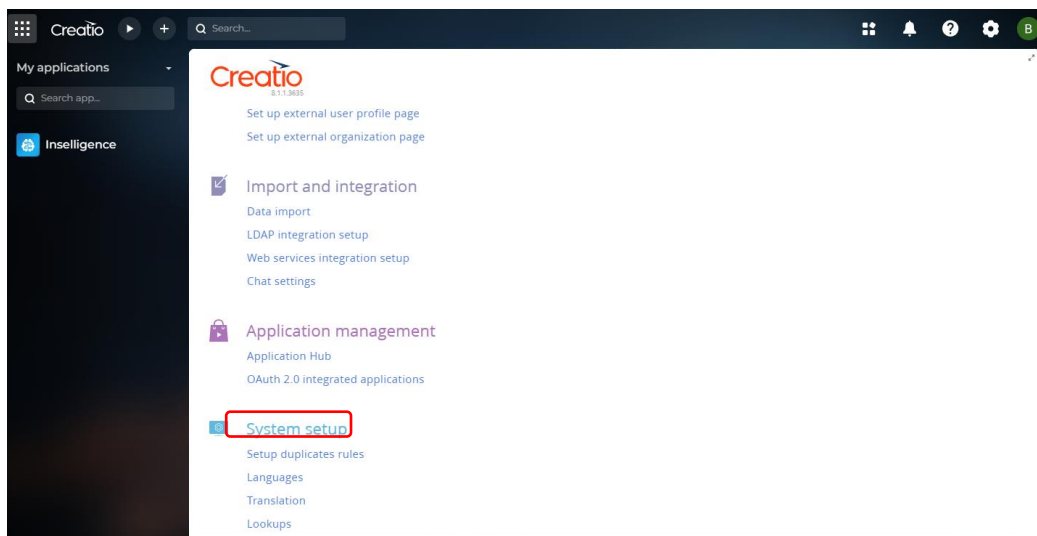

Note 1:

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:"
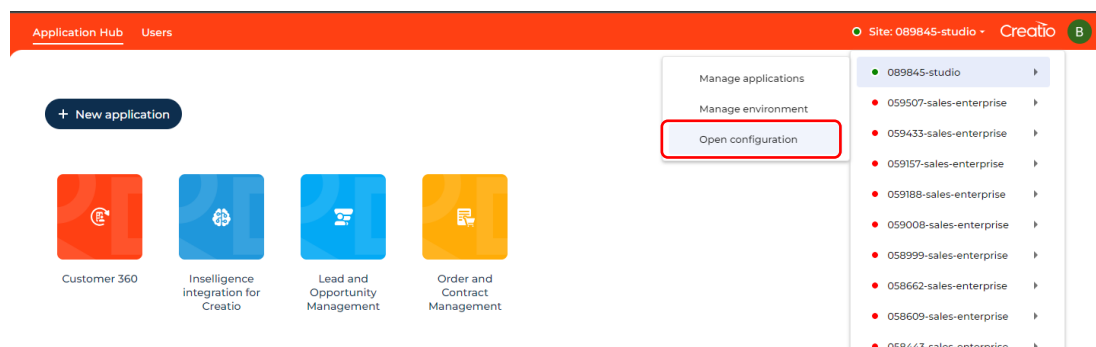
1. Access Settings on Creatio.

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.

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

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

7. Wait for the packages to be compiled.

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

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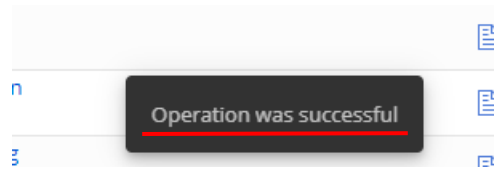
9. Proceed to continue with the configuration of the Pipeline in Inselligence.