

# Install Salesloft connector for Creatio

Salesloft connector for Creatio lets you update Salesloft database with Creatio contact and account records manually or automatically to keep Salesloft data up-to-date. The app also lets you add contacts to Cadence directly from Creatio, which streamlines sales associates' workflow drastically.

The app has the following key features:

- Transfer Creatio contact and account data to Salesloft.
- Transfer contact data in bulk.
- Add contacts to Cadence directly from Creatio.
- Map custom fields.
- Update Salesloft records automatically

**This app supports both FreedomUI and ClassicUI**

# Install the app

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

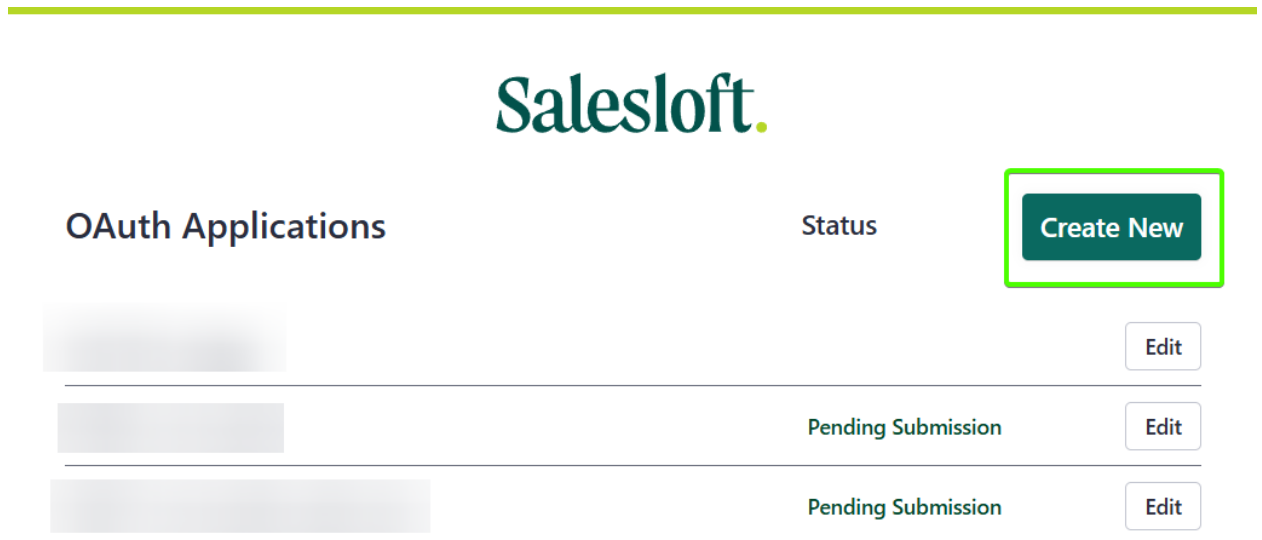
If you use Creatio on-site, make sure that Creatio can access the Internet. To do this:

- Grant access to the <http://package-store.creatio.com/> website.
- Install the Salesloft connector for Creatio app using the following link: <https://marketplace.creatio.com/app/salesloft-connector-creatio>

# Connect the app to Salesloft

## Create Salesloft API keys and add them to Creatio

1. Open Salesloft integration settings:  
<https://accounts.salesloft.com/oauth/applications>
2. Click [ Create New ].



3. Enter an arbitrary name of the integration in the [ *Name* ] field. For example, "Creatio app."
4. Enter the redirect URI of the Salesloft connector in the [ *Redirect URI* ] field. Use the following format: <https://sitename.domain.com/0/rest/SalesloftOAuth/Response>.
5. For [ Application Type ], select "No, this will be a private team application". For [ Grant Type ], select "Authorization Code".

### Application Type

Will this app be published as a public Frontend Integration?

- Yes, this will be a public application
- No, this will be a private team application

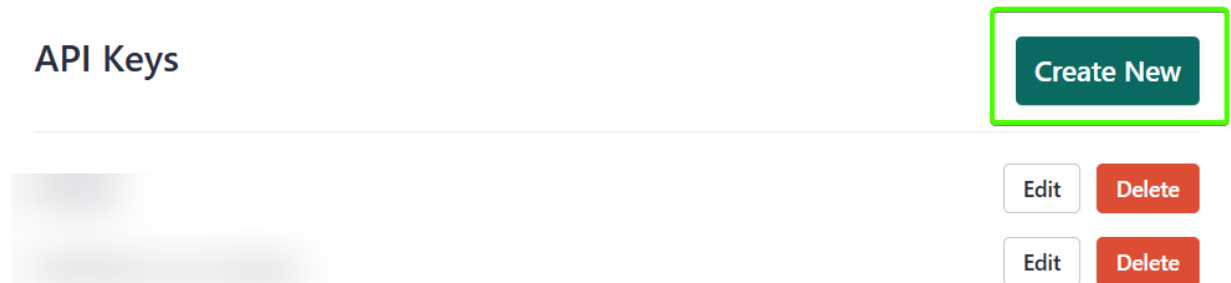
### Grant Type


What grant type will this application be using?

- Authorization Code**  
Recommended for applications that require end users to authorize
- Client Credentials**  
Recommended for automated backend processes or server-to-server communication

6. Go to the "Scopes" block. Use "Select all" option.
7. Click [ *Submit* ]. This opens a new page.

8. Save the "Application Id" and "Secret" values on the page that opens.
9. Follow the instructions in the Creatio documentation: [Set up a new OAuth 2.0 application](#). Fill out the [ Client Id ] and [ Client secret ] fields with the "Application Id" and "Secret" values, respectively.
10. Return to the Salesloft integrations settings and click [ Create New ] in the "API Keys" block:





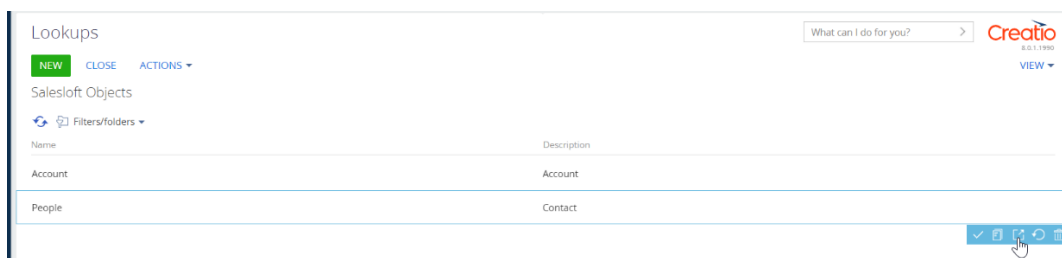
11. Enter an arbitrary name of the integration in the [ Name ] field. For example, "Creatio app."
12. Go to the "Scopes" block. Use "Select all" option.
13. Click [ Save ]. This opens the API key page.
14. Copy the key and specify it in the "Admin Token" ("DlbSalesloftAdminToken" code) [Creatio system setting](#).
15. Click  to open the System Designer.
16. Go to the [ Import and integration ] block → [ Connect to Salesloft ] and follow the instructions.
17. Each Creatio user signs into their own Salesloft account the first time they trigger a Salesloft action.



# Set up field mapping

Salesloft connector for Creatio includes pre-mapped fields. You can map new fields in the [ *Salesloft Objects* ] lookup.

To set up field mapping:

1. Click  to open the System Designer.
2. Go to the [ *System setup* ] block → [ *Lookups* ].
3. Open the [ *Salesloft Objects* ] lookup.
4. Select an object on the lookup content page and click  (Fig. 1). This opens a new page.



5. Expand the [ *Salesloft Mapping* ] detail on the page that opens and click [ + ].
6. Fill out the columns of the new record:
  - a. Specify the Salesloft field in the [ *SalesLoft object field* ] column.
    - For working with basic Salesloft fields read the “*Salesloft field mapping*” paragraph;
    - For working with custom Salesloft filed use the following syntax:  
[custom].[text].test\_text\_field  
, where  
[custom] – custom field index  
[text] - Salesloft filed type (text or date)  
test\_text\_filed – field name in Salesloft
  - b. Specify the Creatio field in the [ *Creatio column* ] column .
7. Click  to save the mapping.

**ATTENTION.** The Owner field is intentionally excluded from the mapping lookup. The connector does not copy Creatio's “*Owner*” to Salesloft — the Salesloft record is owned by the user whose Salesloft account is connected in Creatio and who triggered the action.

**Note.** You can restore all pre-configured mapping rules in “Advance settings” via Data bindings “DlbSalesLoftMapping”.

# Send records to Salesloft and Cadence

The connector pushes Contact and Account records to Salesloft. You can send a single record from its record page, or many records at once from a section list (manually selected or by folder).

**Note.** You can also send Lead records. However, when you do this, Creatio sends the records of contacts connected to the lead to Salesloft (ClassicUI only).

You can specify an individual record from the record page or multiple records from the section list.

Make sure that the selected records follow these conditions:

1. Contact records must have [ *Full name* ] and [ *Email* ] or [ *Full name* ] and [ *Mobile phone* ] fields filled out.
2. Account records must have the [ *Web* ] field filled out.
3. If two or more selected contacts share an email address, the connector keeps the oldest record (by created date) and skips the rest with a sending-log entry.

If a record does follow any condition, the app sends a warning in a dialog when sending a single record and a notification in a communication panel message when sending multiple records.

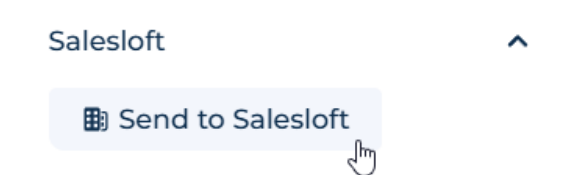
## Send a single record

Open a record page.

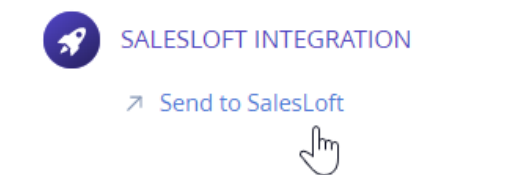
Click [ *Send to Salesloft* ] in the [ *Salesloft integration* ] module.

As a result, Creatio will save the record and send the values of mapped columns to Salesloft.

*FreedomUI*



*ClassicUI*

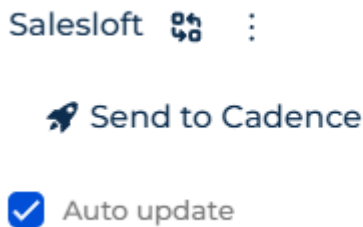


If the [ *Account* ] field in a contact record is filled out, the corresponding Salesloft record is created and linked to the contact. If such a record already exists, Salesloft links it to the contact. Customize this behavior in the "Auto create account for contact" ("DIbAutoCreateAccountForContact" code) system setting.

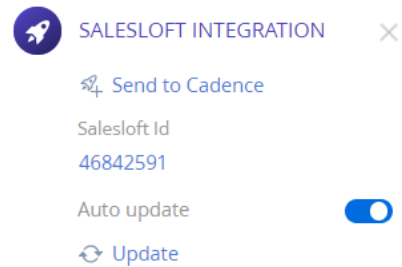
Once Creatio finishes sending the record, the [ *Salesloft Id* ] field will be populated with the record ID from Salesloft.

After you send a record to Salesloft, Creatio will enable the [ *Auto update* ] toggle. You will also be able to update the record manually by clicking [ *Update* ].

#### *FreedomUI*



#### *ClassicUI*



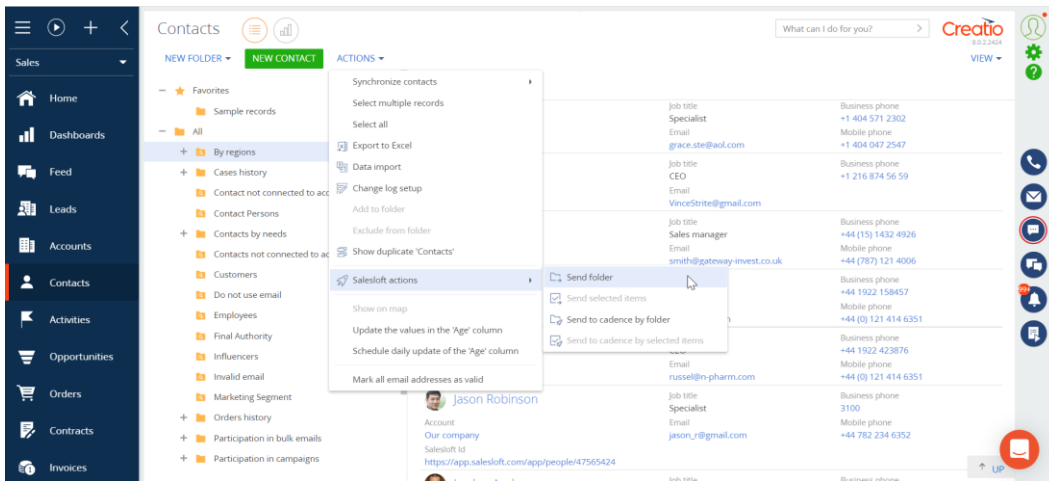
**Note.** You can disable the automatic record updates in the “Auto update record in Salesloft” (“DlbAutoUpdateRecordSL” code) system setting.

## Send records in bulk

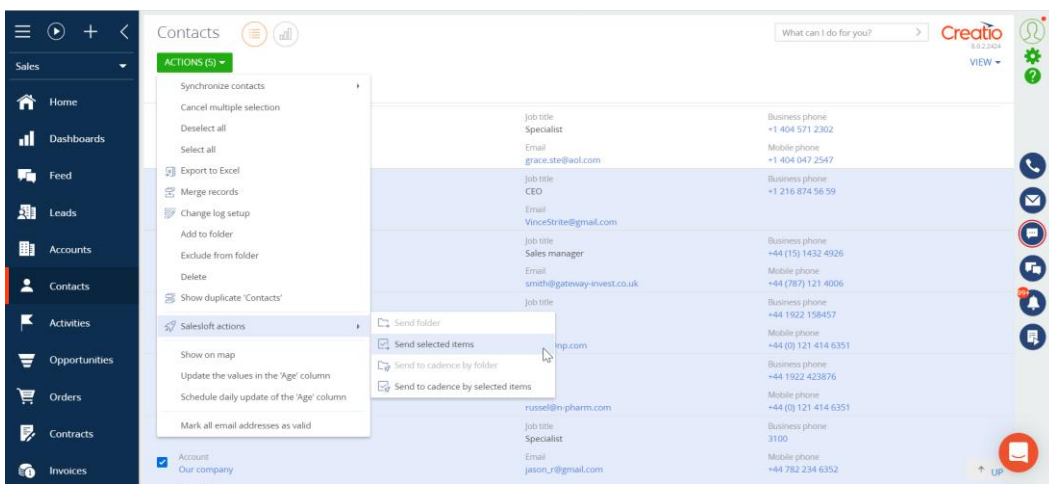
**Note.** This action is available only for the [ *Contacts* ] and [ *Leads* ] (ClassicUI only) objects.

To send records to Salesloft in bulk:

1. Open the section list.
2. Select records to send to Salesloft manually or from a folder.
  - Select records in the list to add them **manually**.
  - Select [ *Show folders* ] in the [ *Filters/folders* ] menu and specify the needed folder to add records **from a folder**. You can filter the folder records using a standard filter. Learn more about managing folders in Creatio documentation: [Folders](#).
3. Point to [ *Salesloft Actions* ] in the [ *Actions* ] button menu. This opens a submenu.
  - Click [ *Send folder* ] in the submenu to add **all records** that match the filter conditions.

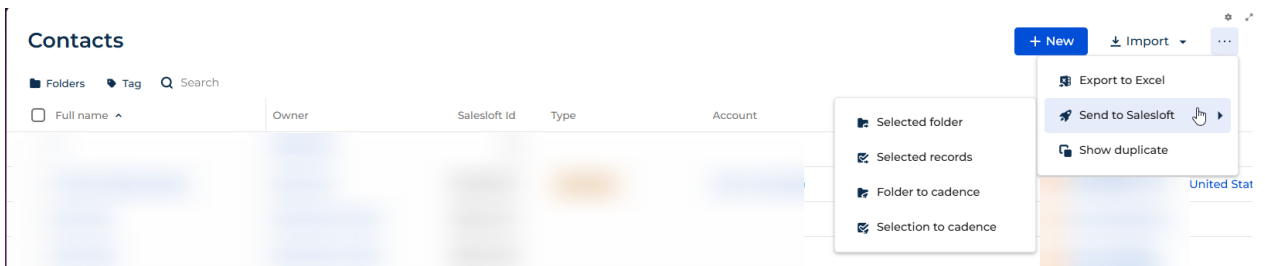


- Click [ *Send selected items* ] in the submenu to add the **records selected manually**.



**Note.** If the specified records have already been sent to Salesloft, the connector updates them.

In FreedomUI, the same actions live in the Actions menu on the right of the section list.



## Add records to Cadence

**Note.** This action is available only for the [ *Contacts* ] and [ *Leads* ] (ClassicUI only) objects.

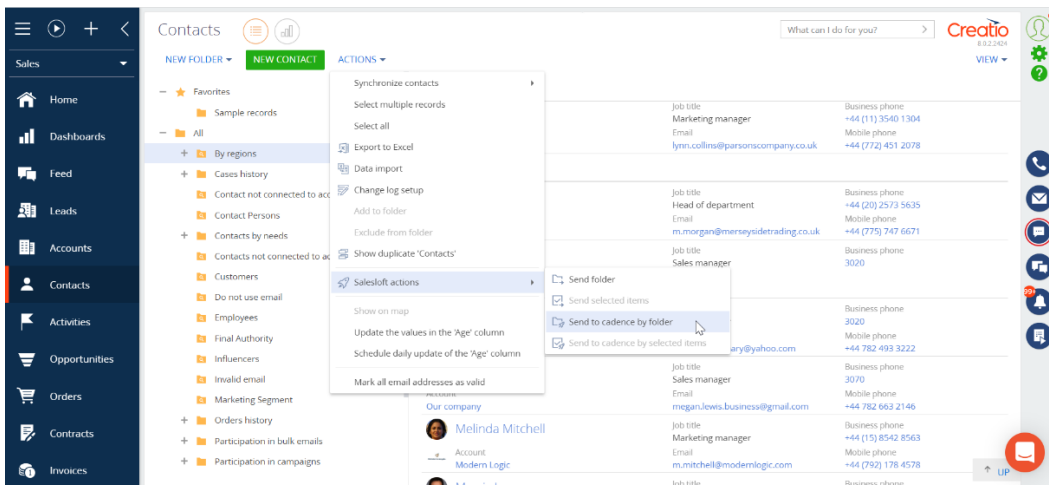
You can add records to Cadence in Salesloft directly from Creatio.

To send an individual record to Cadence:

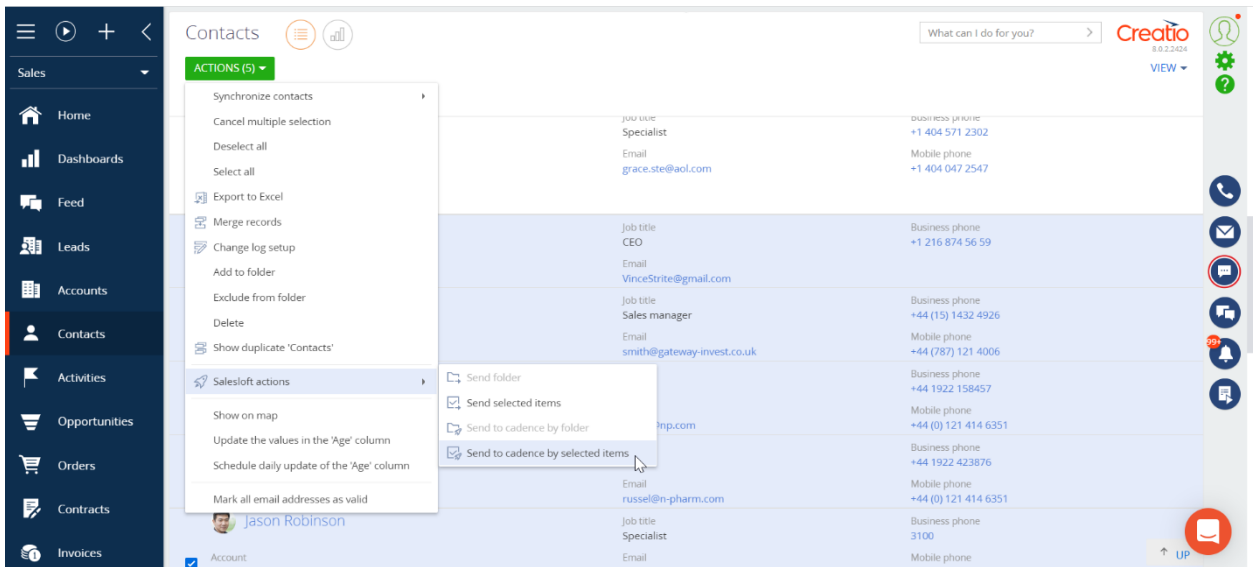
1. Open the record page.
2. Click [ *Send to Cadence* ] in the Salesloft app. This opens a window.
3. Select Cadence in the window that opens. This opens another window.
4. Select the Cadence step in the window that opens.

To send records to Cadence in bulk:

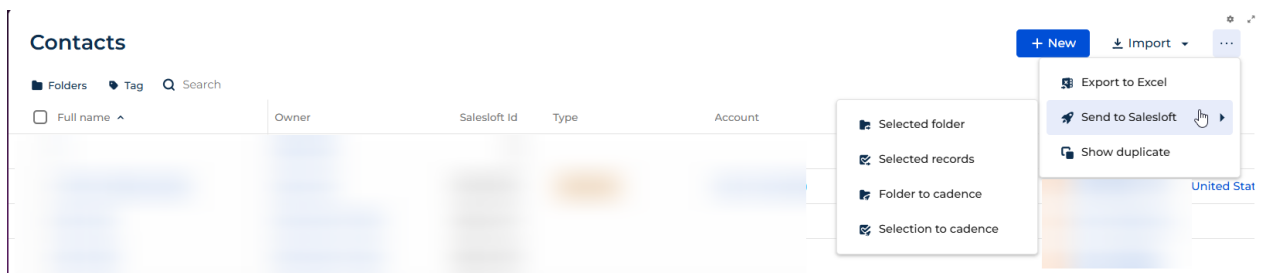
1. Open the section list.
2. Select records to send to Cadence manually or from a folder.
  - o Select records in the list to add them **manually**.
4. Select [ *Show folders* ] in the [ *Filters/folders* ] menu and specify the needed folder to add records **from a folder**. You can filter the folders using a standard filter. Learn more about managing folders in Creatio documentation: [Folders](#). Point to [ *Salesloft Actions* ] in the [ *Actions* ] button menu. This opens a submenu.
  - o Select [ *Send to cadence by folder* ] in the submenu to add **all records** that meet the filter conditions to the email audience.



- o Click [ *Send to Cadence by selected items* ] in the submenu to add the **records selected manually**.



In FreedomUI, the same actions live in the Actions menu on the right of the section list.



**Note.** After you send records in bulk, you can check the results in the Salesloft sendings log. The app will also send a system notification that has the number of sent records.

**Attention.** The “Salesloft. Use initiating user for cadence” (“DlbUseInitiatingUserForCadence” code) system setting controls who the contact is assigned to in Salesloft when added to a cadence:

- On (default). The contact is added under the Salesloft user who initiated Send to Cadence in Creatio.
- Off. The contact is added under the contact Owner in Salesloft.

# Synchronize activities from Salesloft

Salesloft connector for Creatio lets you attain 360-degree contact view much easier.

You can synchronize activities (emails, tasks, and calls) made in Salesloft with Creatio manually or using Cadence.

By default, Creatio synchronizes activities every 30 minutes. You can change the period in the [ *Timer* ] element of the “Salesloft CRM activities sync” business process.

Creatio saves the Salesloft activities to the relevant Creatio object:

Salesloft activities	Creatio object
Call	Call
Email	Activities, - Email type
Task	Activities, - Task type

To disable the synchronization of Salesloft activities, deactivate the “Salesloft CRM activities sync” business process.

Before the first synchronization, you can specify the synchronization start date in the “Salesloft CrmActivity last sync date” (“DlbSalesloftLastSyncDate” code) system setting.

Also, you can view the Salesloft contact statistics in the [ *Salesloft integration* ] module in Creatio (ClassicUI only):

**SALESLOFT INTEGRATION** ×

Send to Cadence

Salesloft Id  
53898512

Auto update

Update

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**7** Calls logged    **3** Email Sent    **0** Opened  
**0** Clicked    **0** Replied