Outlook Connector for Creatio
User Guide
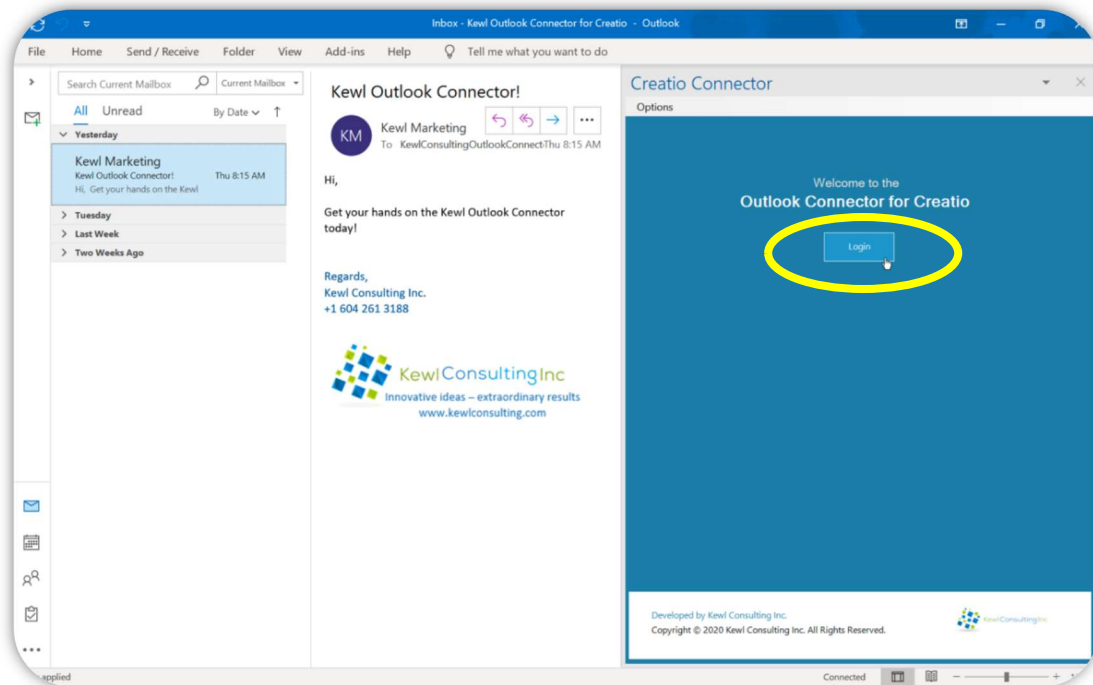
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Getting Started

▪ Signing into the Outlook Connector with Creatio Credentials

You will need to log into Creatio **first**, to validate your credentials. To initiate this process, within Outlook, click the Login button on the Outlook Connector pane.
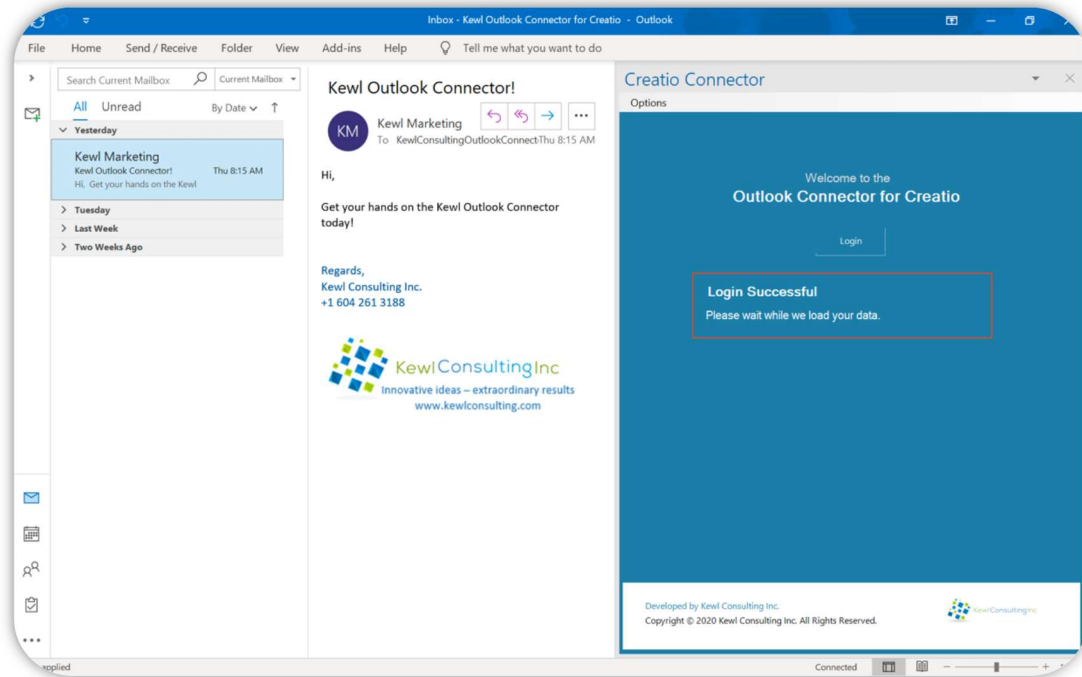

1. Enter only your Creatio site identifier as indicated ([https://**myCreatioSite**.creatio.com](https://myCreatioSite.creatio.com)). In this example you would enter **myCreatioSite** and not the entire URL.
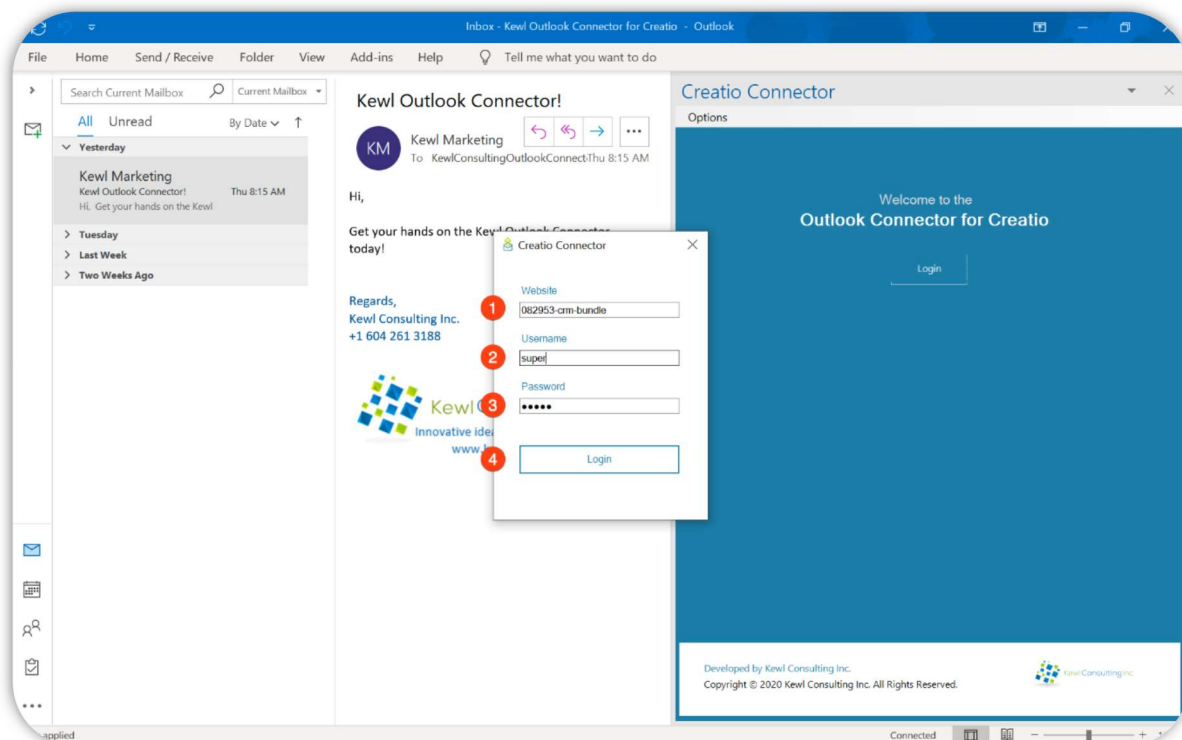
2. Add your Creatio Username just as you would when signing into the Creatio application
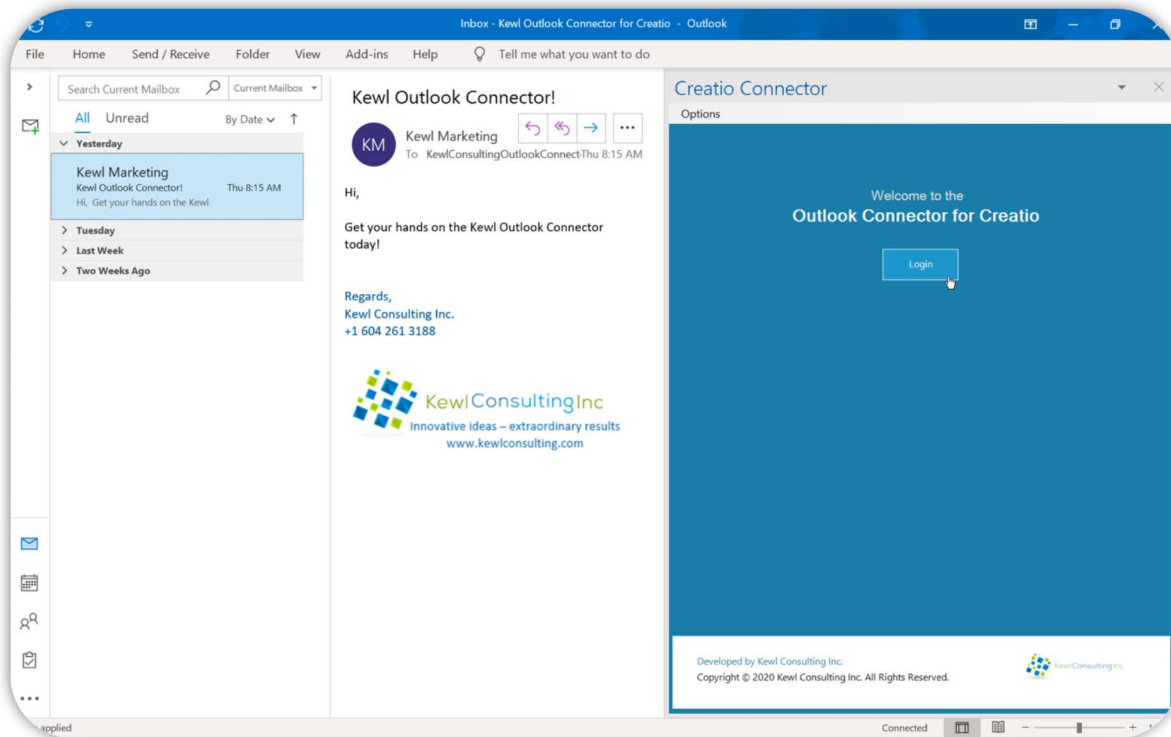3. Enter your Creatio Password
4. Press the Login button

The Connector will display a success message upon successful login, and once the data has been loaded the interface will updated. The Website and Username will be saved automatically and only the Password will be required for future sign in attempts.

▪ Signing into the Outlook Connector with Configured SSO

NOTE: requires the Outlook Connector PLUS Edition

To use one of Creatio's SSO options click the Login button and follow the steps.

1. Enter only your Creatio site identifier as indicated (https://**myCreatioSite**.creatio.com). In this example you would enter **myCreatioSite** and not the entire URL.

Only the Creatio Site is needed when using SSO. Username and Password do not need to be provided as they will not be utilized during the login process.
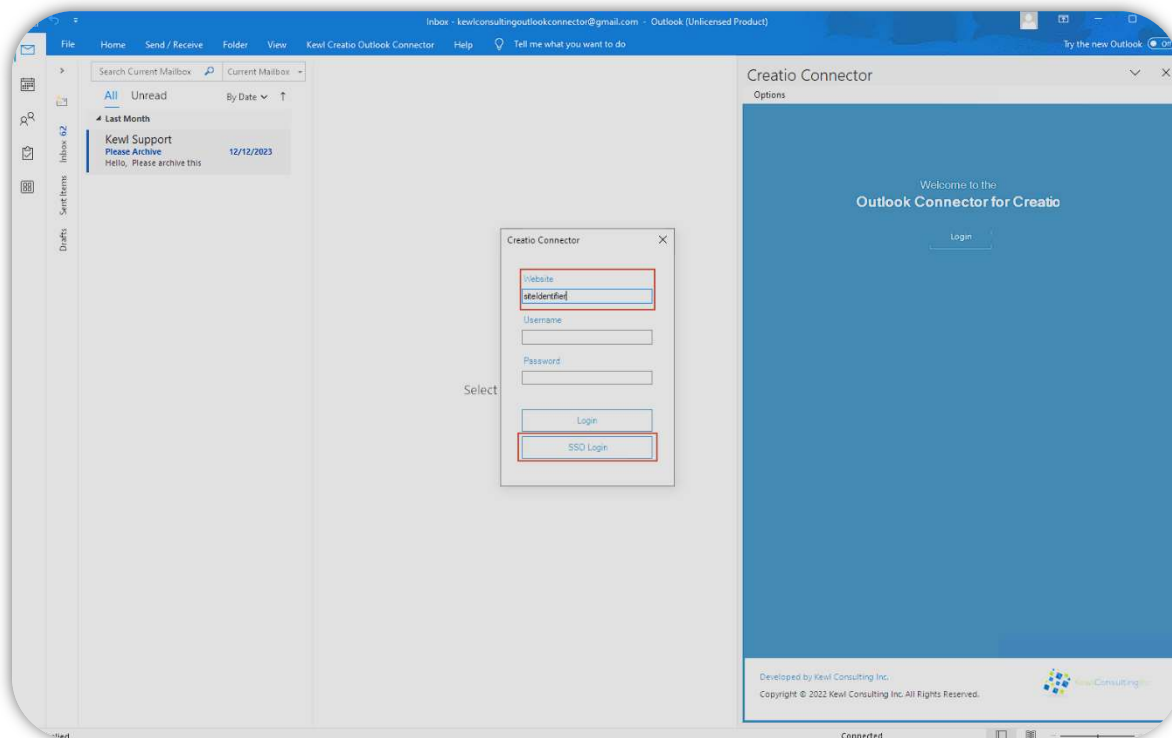
2. Click the **SSO Login** button to launch a window
3. Once the Creatio login page has loaded click the link for your SSO option, this will redirect you to login via the selected Identity Provider
4. Sign in as you normally would and once the process is completed successfully the window will close and the Connector will launch for use

> If you are redirected back to the Creatio login page, click the SSO login URL again to complete the login.

User Interface

Navigating Sections

To view the results of a specific Section, click the respective section button at the top of the panel.
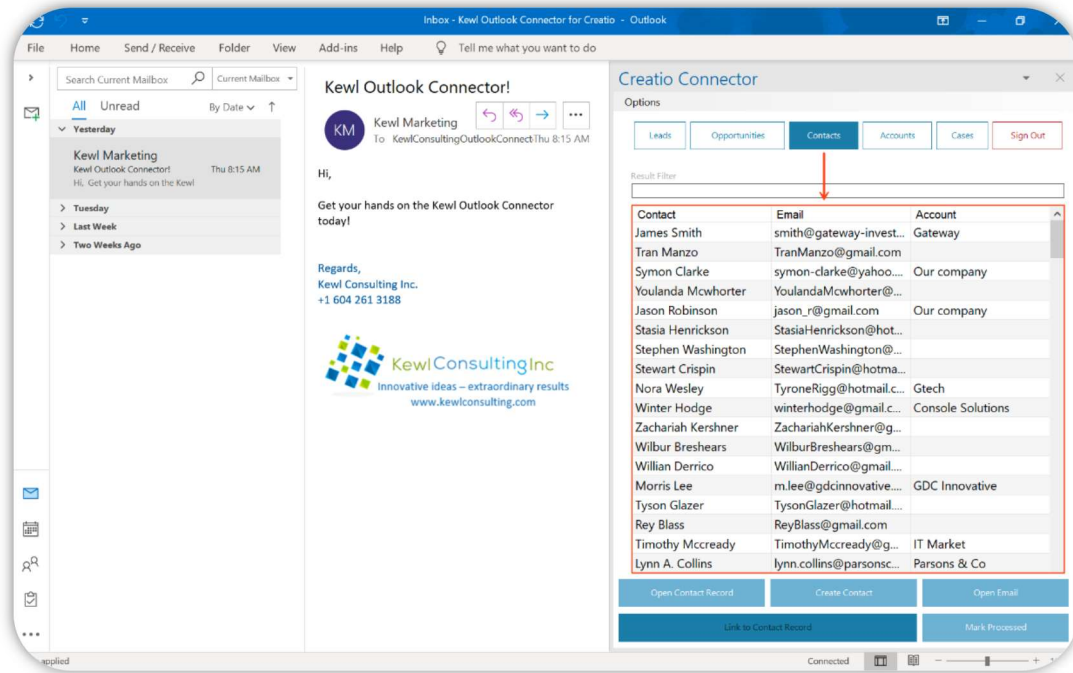
Selecting a section will reload the data in real-time from the Creatio environment. Data for the currently active section can also be refreshed by clicking the section button again.

Filtering Results

The Result filter text box allows for filtering the results in the current view. The filter will actively search as you type, for all columns in the active section.
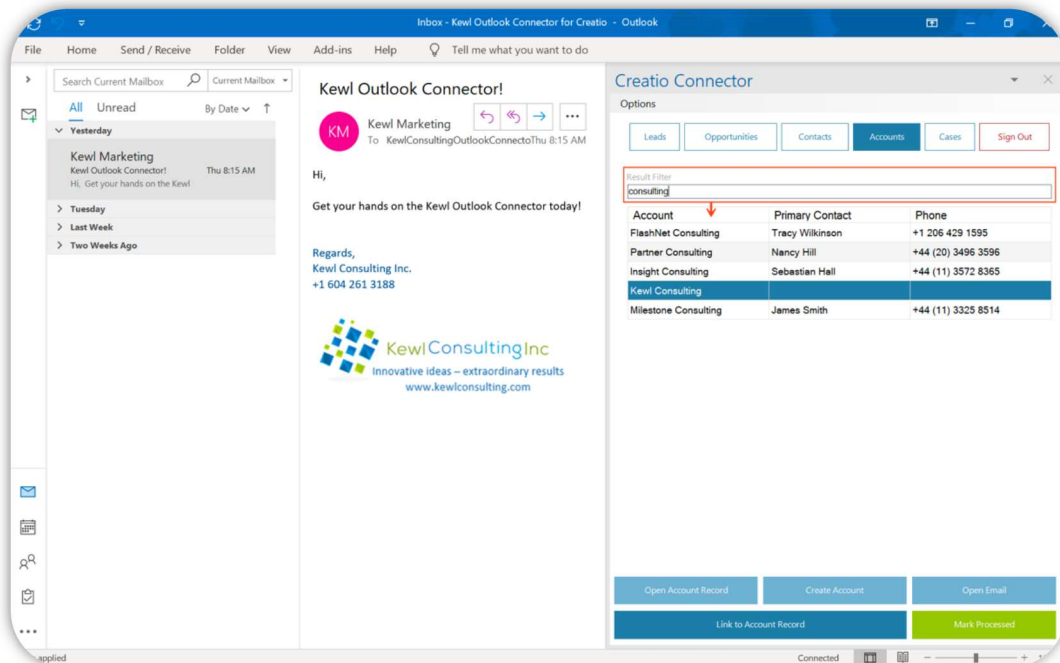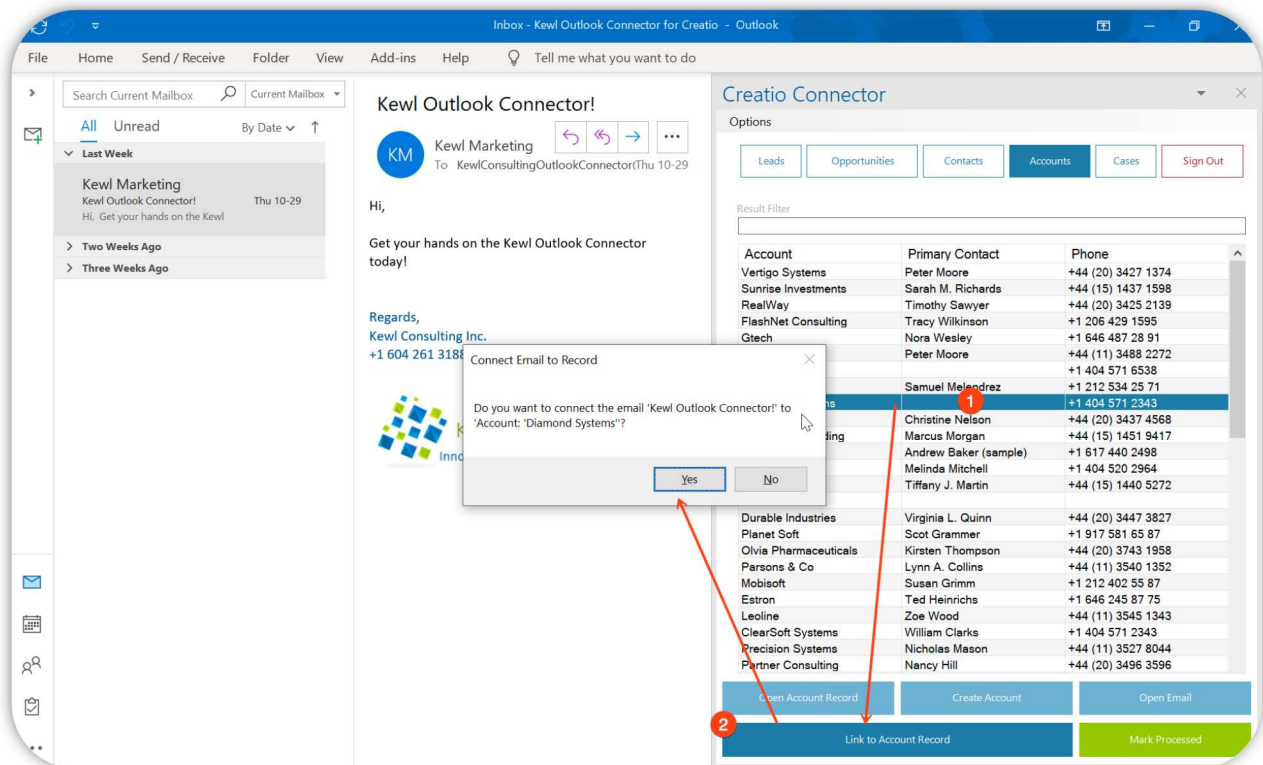
Connecting Records

There are two ways to connect a record to the selected (open) email:

1. Double-click the desired record
2. Select the record from the list and click the Link to Record button

Both methods begin the connection process by providing a prompt to confirm the connection. This prompt displays the **Email Subject** and the **Record Name**.

Clicking the **Yes** button confirms the connection which will then proceed to connect the email to the record. While clicking the **No** button will simply cancel the connection process.

This prompt can be disabled from the Options menu. Care should be taken when disabling this option as double-clicking a record will automatically run the connection process.
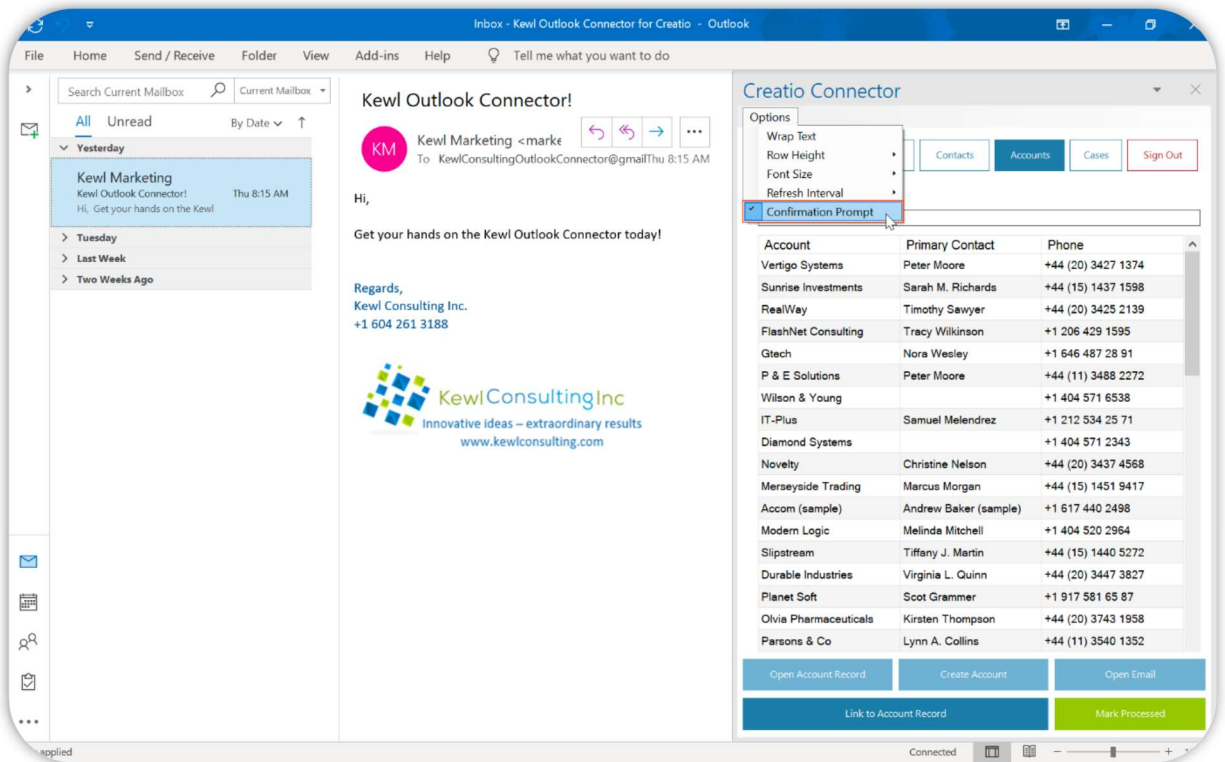
Creating Tasks for Records

Tasks (Creatio Activities) can be quickly created directly from Outlook using the Connector. Tasks are automatically connected to the record for which they are created.

1. Right-click the record to bring up the context menu
2. Select the Create Task option to open the Create Task pop-up form
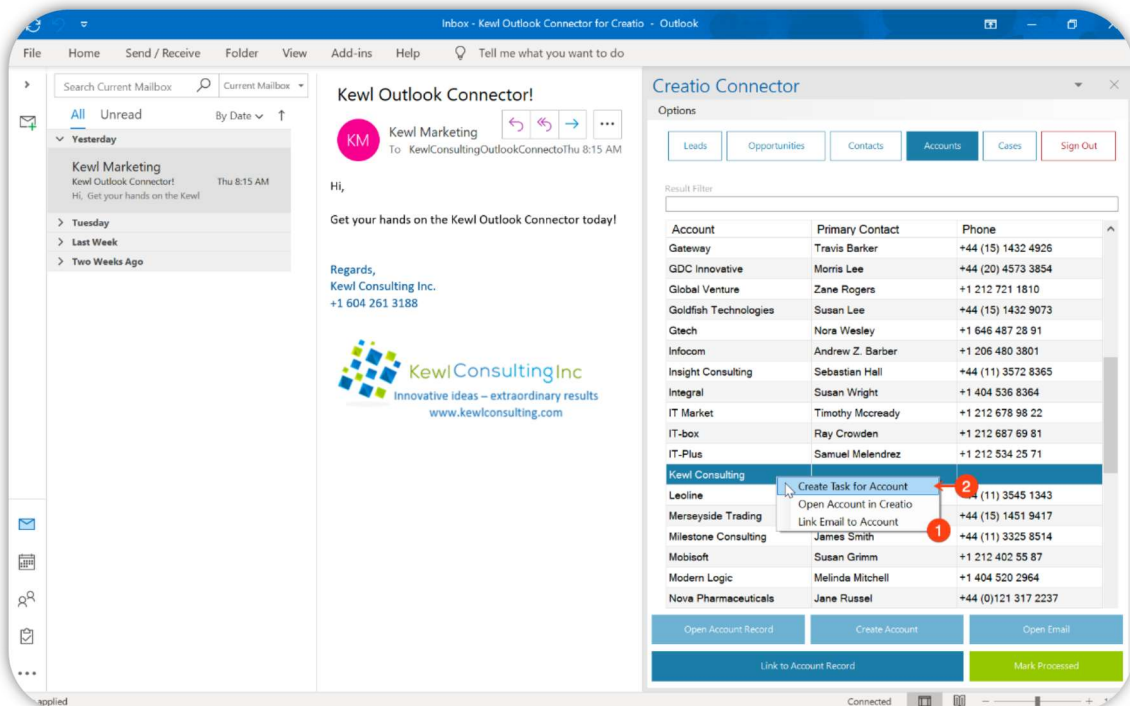
3. When the Create Task form opens fill out the necessary fields
   a. Subject – this is the title or subject of the task
   b. Start Date and Time – the start date and time of the task
   c. Due Date and Time – the due date and time of the task
   d. Show in Calendar – whether or not the task should display in the calendar view of Creatio
   e. Priority – the priority of the task, the values for this lookup are pulled from your Creatio instance
   f. Status – the status of the task, the values of this lookup are pulled from your Creatio instance
   g. Open Task in Creatio – should the task open in Creatio in a new browser window for additional work
   h. Create Task Button – will create the task in Creatio with the configured field values
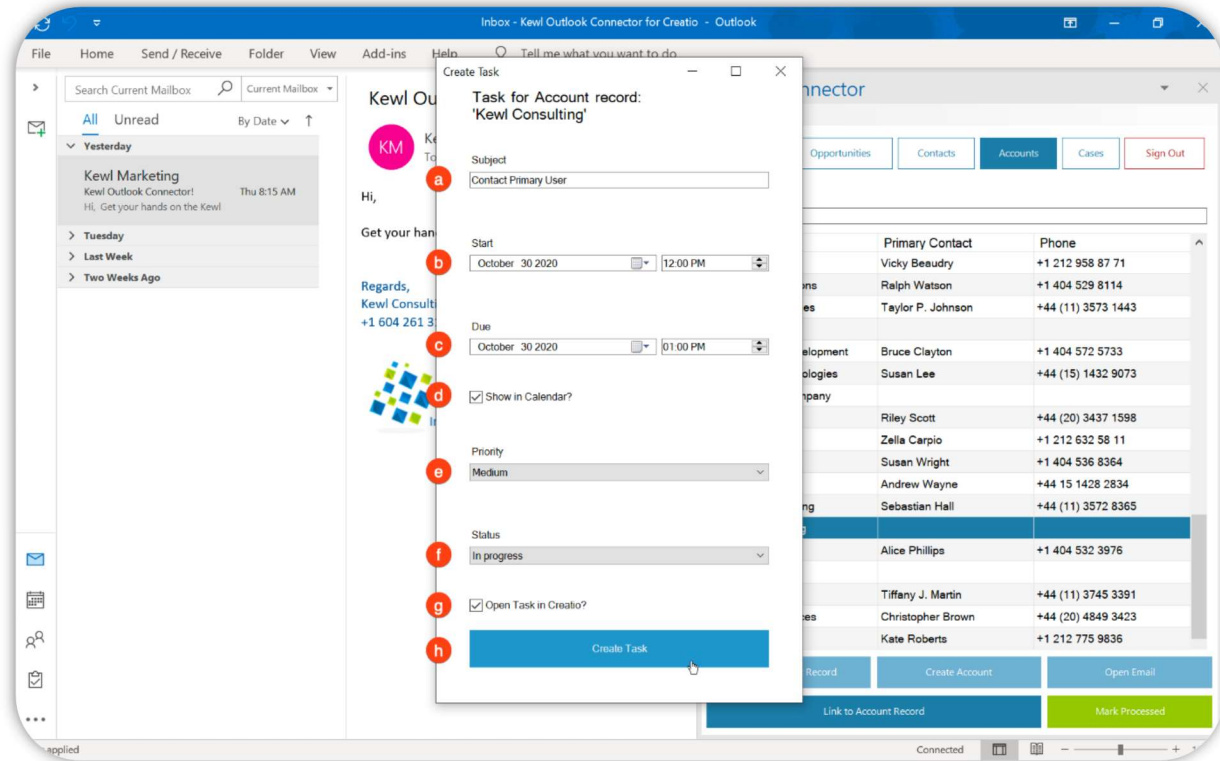
4. Since "Open Task in Creatio" was checked on, a browser window will open to the task in Creatio with the respective fields filled in
5. Additionally, the Task is connected to the Account for which the task was created
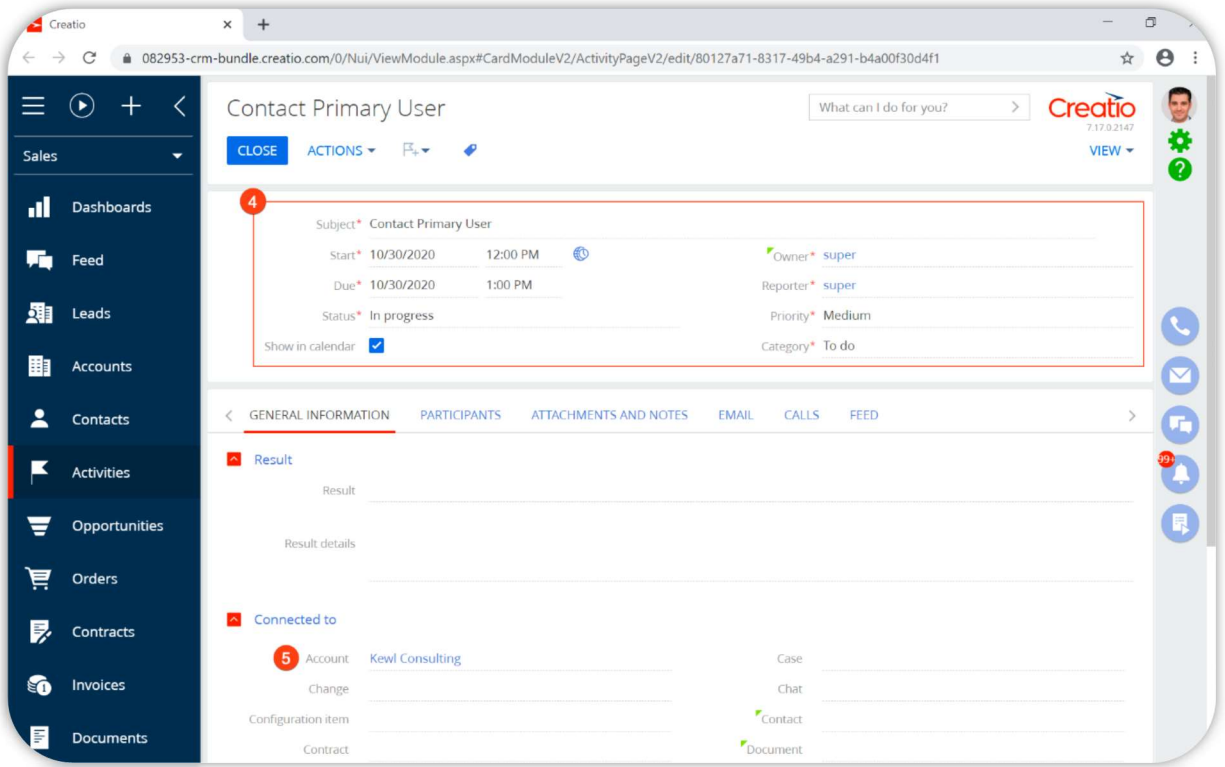
Processing Email from Outlook

Emails can be processed from the Connector in the same way they are processed in Creatio. Select the email (1) and press the Mark Processed button (2). This will mark the email as processed in your Creatio Communication Panel.
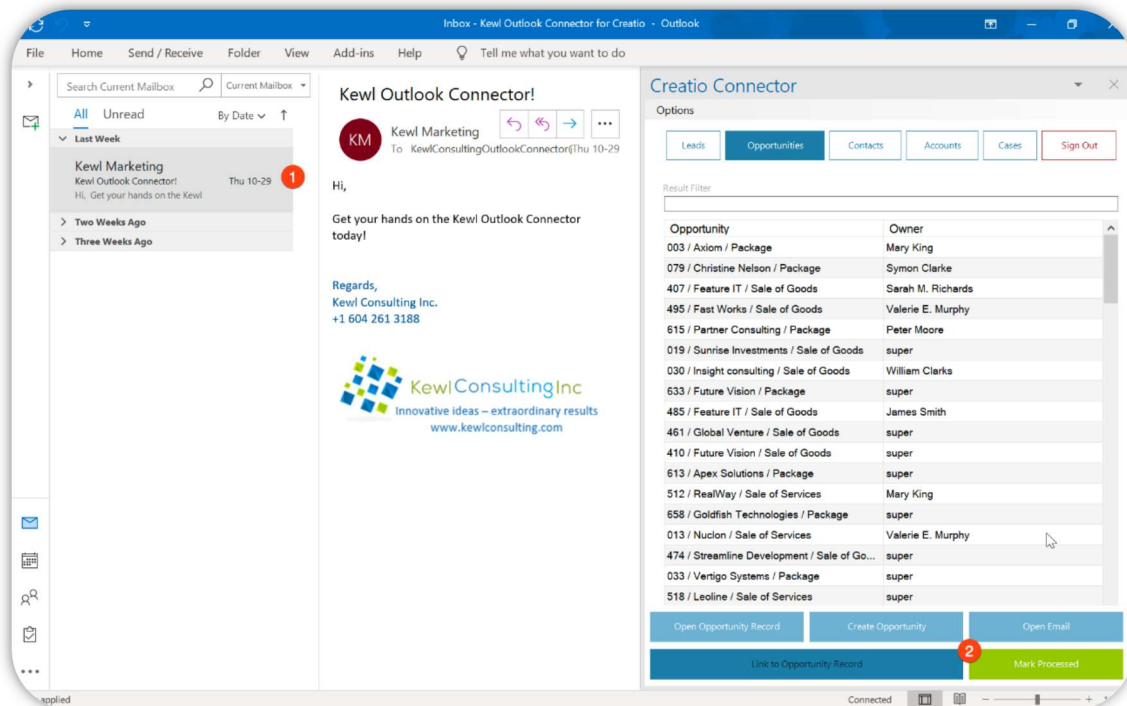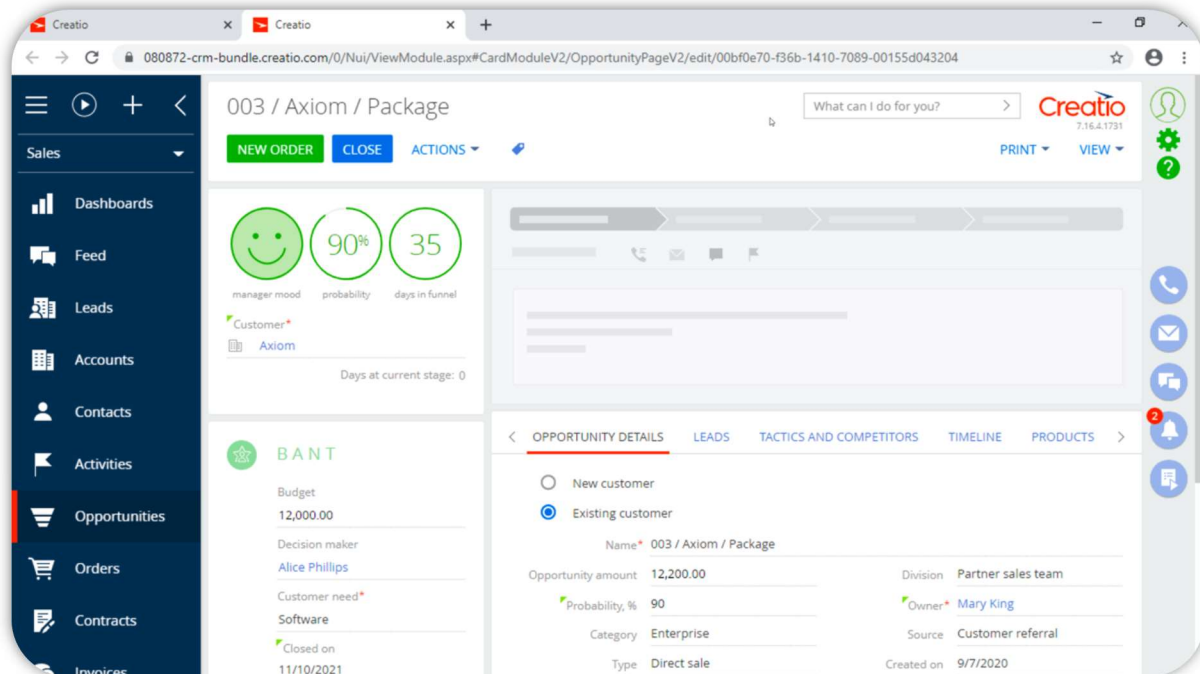
Opening the Selected Record in Creatio

To open the selected record (1) in a Creatio, click the **Open "Section "Record** button (2) and a new browser window will open and load the record page in Creatio.
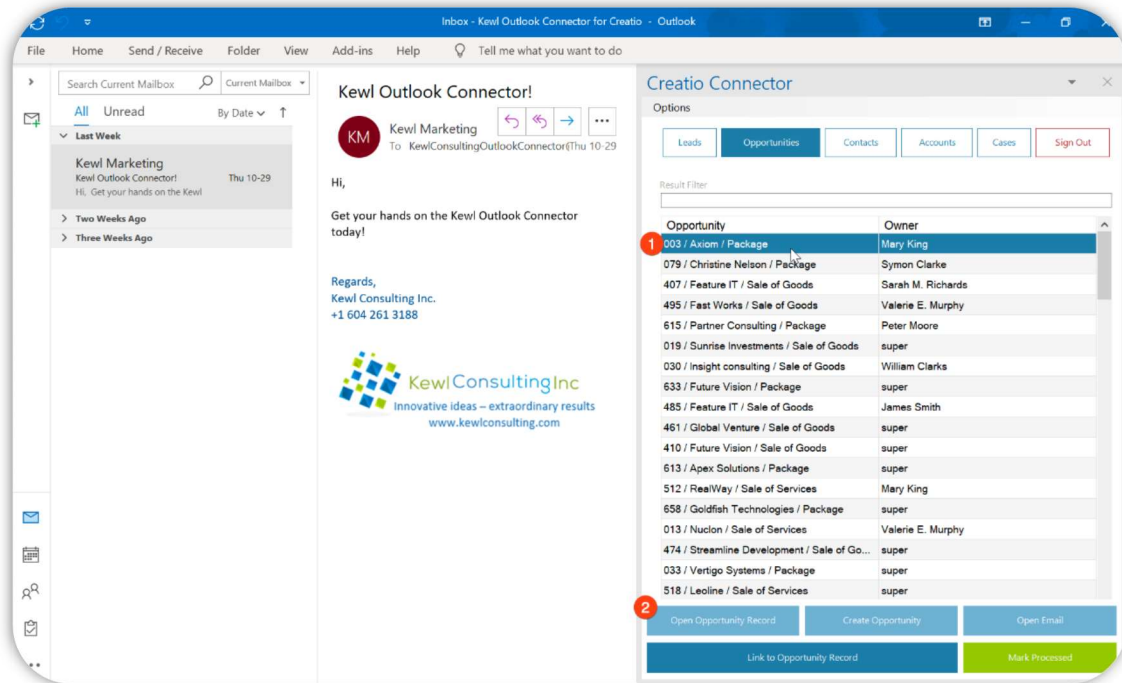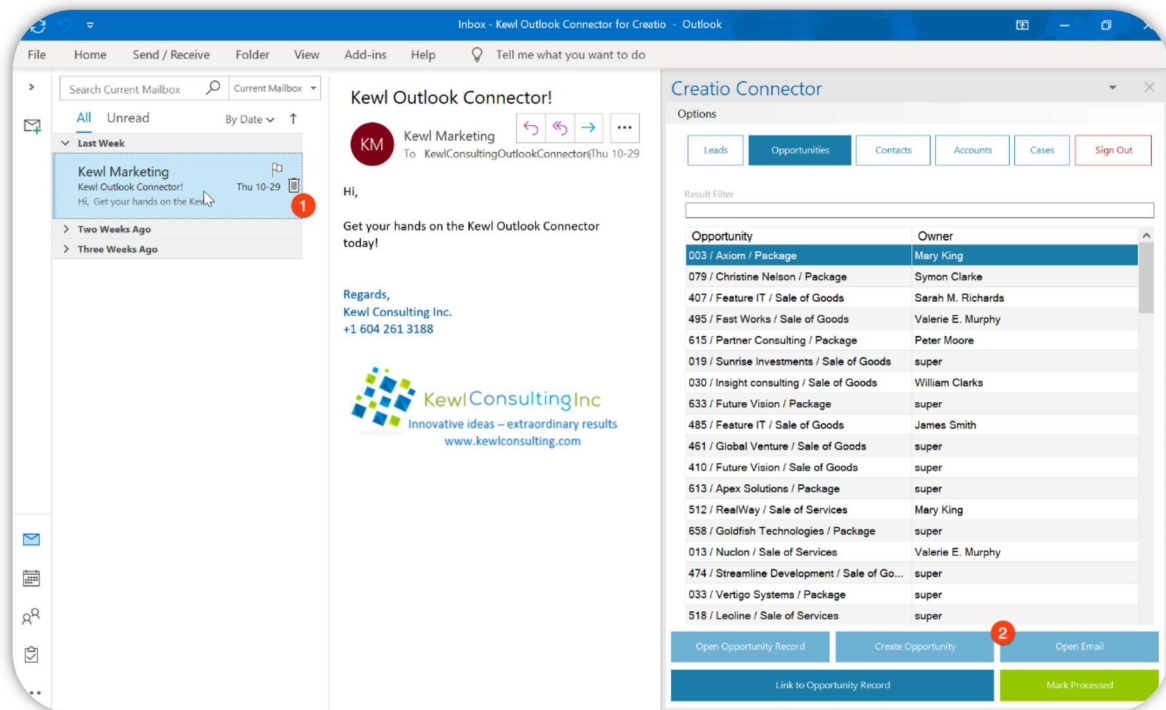

A browser window will open to the selected record in Creatio.

Opening the Selected Email in Creatio

Select the email you would like to open (1) and click the Open Email button (2) to launch a new browser window with the selected email. Note that this function only works for emails that are synced to Creatio with an active email account.
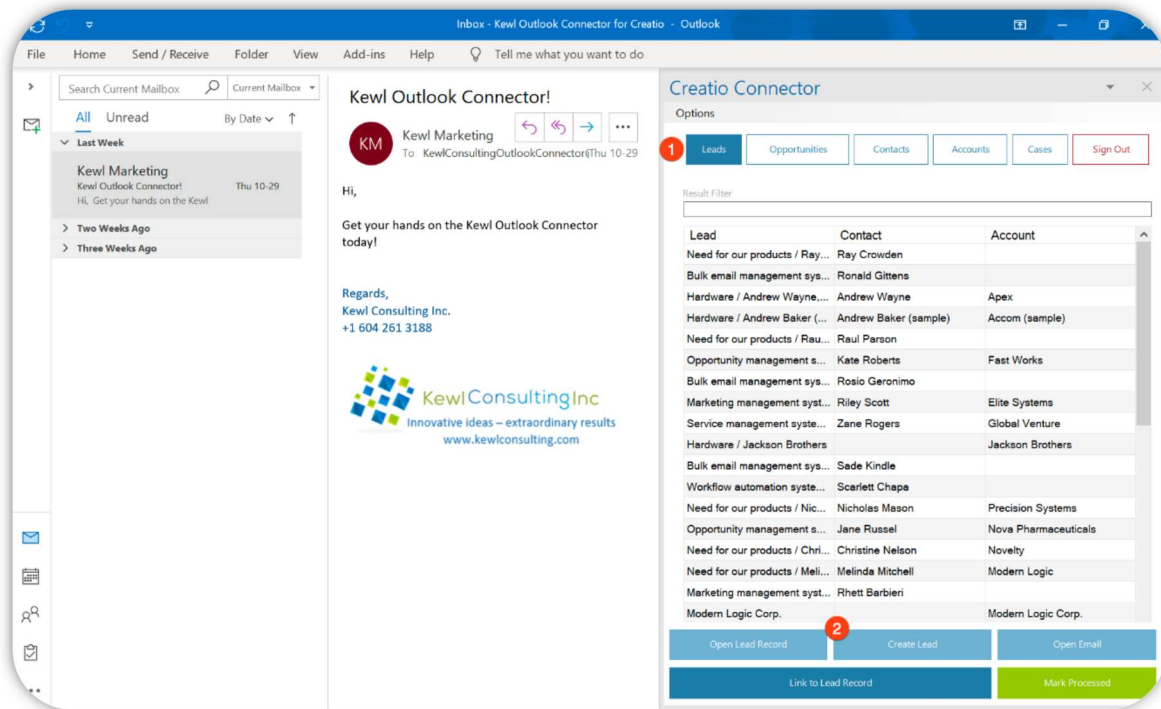

Similar to opening a record, this will open the email activity record in Creatio.
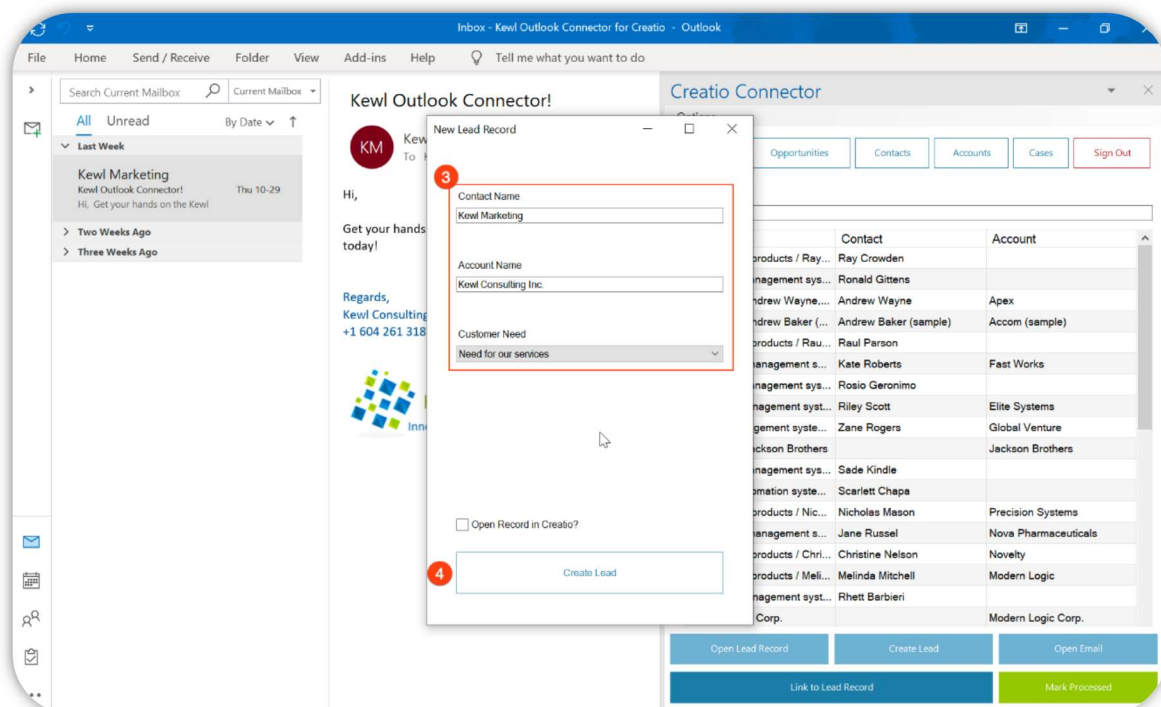
Creating New Records in Creatio

With Kewl's Outlook Connector Sales & Service PLUS you can also create Creatio records directly from within Outlook. For this example, let's create a new Lead.

1. Click the Lead Button
2. Press the Create Lead Button

3. Fill in the Fields
4. Click Create Lead

Optionally you can select the "Open Record in Creatio" checkbox to open the record once it has been created.

## Record Permissions and Security

Access to system records is not managed by the add-on but through Creatio's Permissions. The same permissions that apply within the Creatio application will apply within the Connector. Therefore, if a user does not have access to certain records in Creatio they will not have access in the Connector.

Options

There are some available options to change how data is displayed.

▪ Word Wrap

This setting will enable or disable wrapping of the text within a cell. Enabling this might be useful to see all the information in a cell without having to resize the columns or hover over the cell.
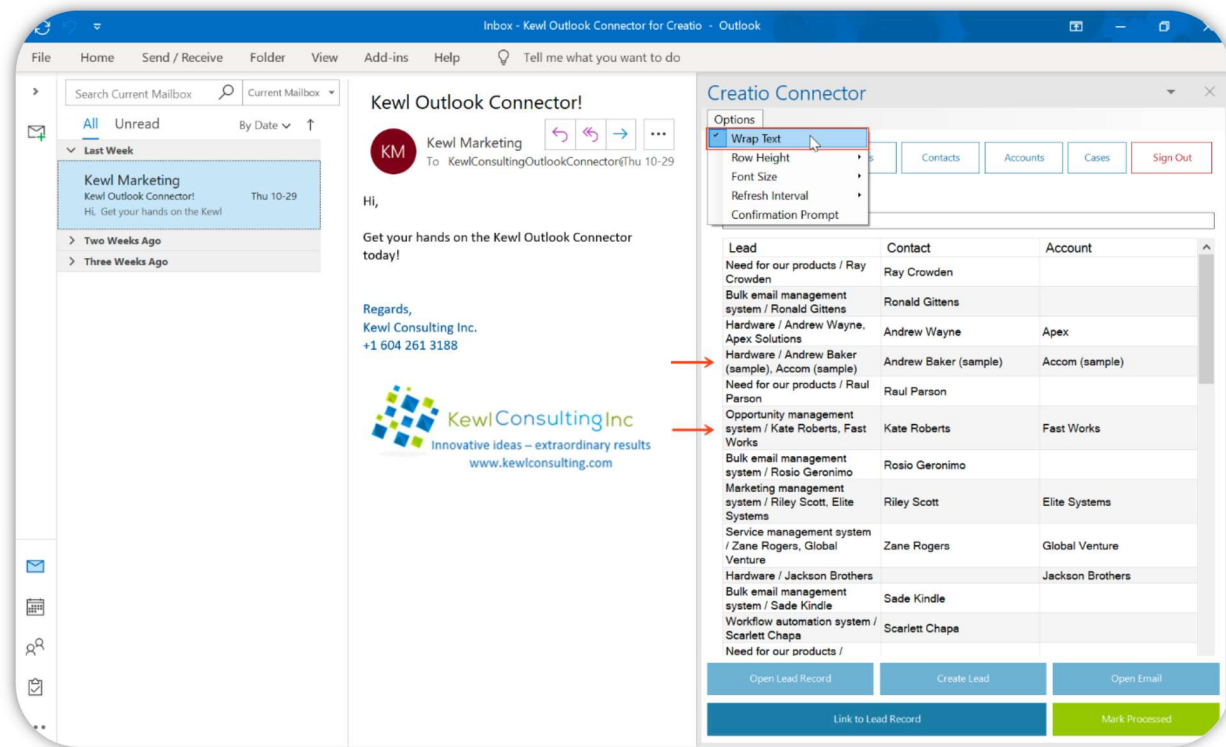
▪ Row Height

This setting allows the height for each row to be set. Options for Small, Normal, and Large row heights are available.

▪ Font Size

For readability there are two font-size settings available. **Normal** is a 9pt font-size and **Large** is an 11pt font-size.

▪ Refresh Interval

This setting allows you to set how frequently the Sections should reload data when they are accessed. Setting this to auto will reload the data for the section whenever the section button is clicked.

- ## Confirmation Prompt

  When connecting an email to a record, a prompt can be displayed to confirm the connection.

Support

Support is available by email at [marketplace@kewlconsulting.com.](mailto:marketplace@kewlconsulting.com)

The Kewl Consulting support team is in the **pacific time zone**, available weekdays between 8:00 am - 5:00 pm.