# **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.

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

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- 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.

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#### 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.

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1. Enter only your Creatio site identifier as indicated (<u>https://myCreatioSite.creatio.com</u>). 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.

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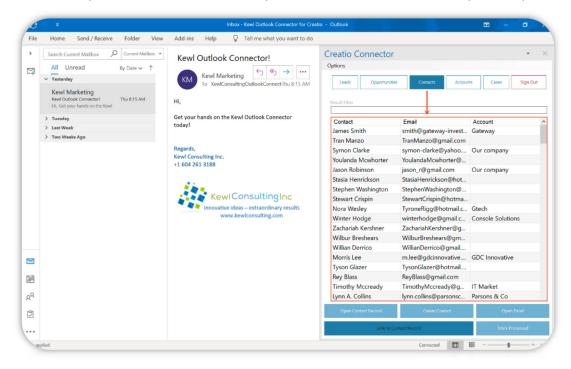
- 2. Click the **SSO Login** button to launch a window
- 3. Once the Creatio login page has loaded click the link for your SSO option, this will redirect you to login via the selected Identity Provider
- 4. Sign in as you normally would and once the process is completed successfully the window will close 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

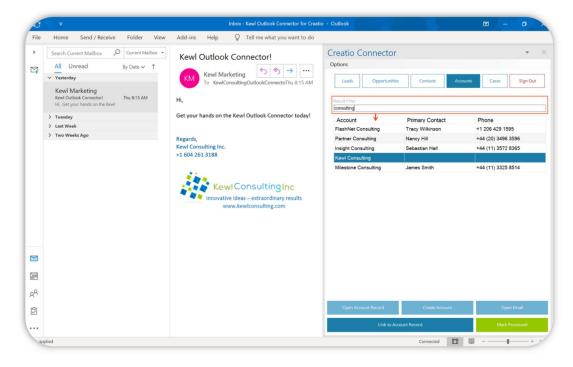
To view the results of a specific Section, click the respective section button at the top of the panel.



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.



#### Page **6** of **15**

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# **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**.

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			Sunrise Investments	Sarah M. Richards	+44 (15) 1437 1598
		P	RealWay	Timothy Sawyer	+44 (20) 3425 2139
		Regards,	FlashNet Consulting	Tracy Wilkinson	+1 206 429 1595
		Kewl Consulting Inc.	Gtech	Nora Wesley	+1 646 487 28 91
		+1 604 261 3188 Connect Email to Record	×	Peter Moore	+44 (11) 3488 2272
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		Account: 'Diamond Systems''?	w .	Christine Nelson	+44 (20) 3437 4568
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		· · · · · · · · · · · · · · · · · · ·	Durable Industries	Virginia L. Quinn	+44 (20) 3447 3827
			Planet Soft	Scot Grammer	+1 917 581 65 87
			Olvia Pharmaceuticals	Kirsten Thompson	+44 (20) 3743 1958
			Parsons & Co	Lynn A. Collins	+44 (11) 3540 1352
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			ClearSoft Systems	William Clarks	+1 404 571 2343
			Precision Systems	Nicholas Mason	+44 (11) 3527 8044
Rq			Partner Consulting	Nancy Hill	+44 (20) 3496 3596
Ć			C pen Account Record	Create Account	Open Email
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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.

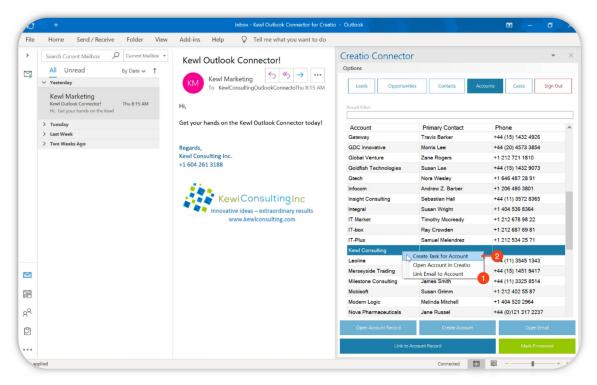
This prompt can be disabled from the Options menu. Care should be taken when disabling this option as double-clicking a record will automatically run the connection process.

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## 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

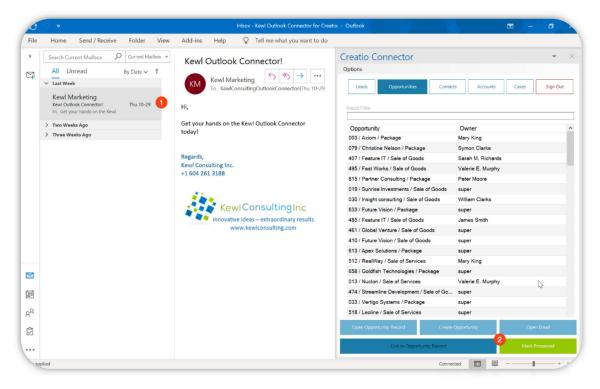
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- 4. Since "Open Task in Creatio" was checked on, a browser window will open to the task in Creatio with the respective fields filled in
- 5. Additionally, the Task is connected to the Account for which the task was created

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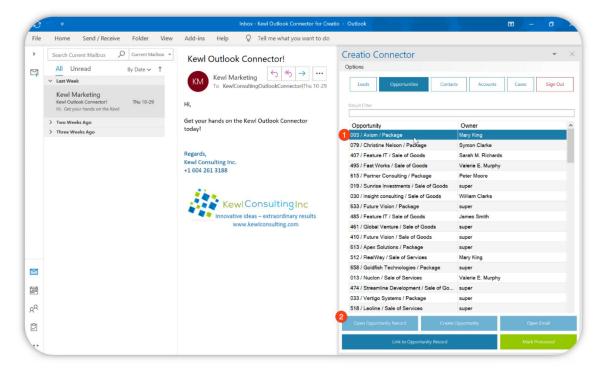
## Processing Email from Outlook

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.

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## 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.

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File >			Creatio Connector Options Leads Opportunities Correct Presult Filter Opportunity 003 / Aviann / Package 073 / Christine Nelson / Package 073 / Christine Nelson / Package 073 / Christine Nilson / Package 073 / Fast Works / Sale of Goods 615 / Partner Consulting / Package 019 / Sunvise Investments / Sale of Goods 033 / Future Vision / Package 485 / Feature IT / Sale of Goods 461 / Global Venture / Sale of Goods 461 / Global Venture / Sale of Goods 461 / Global Venture / Sale of Goods 461 / Javes Solutions / Package 512 / RealWay / Sale of Services	s Accounts Cases Sign Out
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Ì			Open Opportunity Record Create 0	Opportunity Copen Email
			Link to Opportunity Record	Mark Processed

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

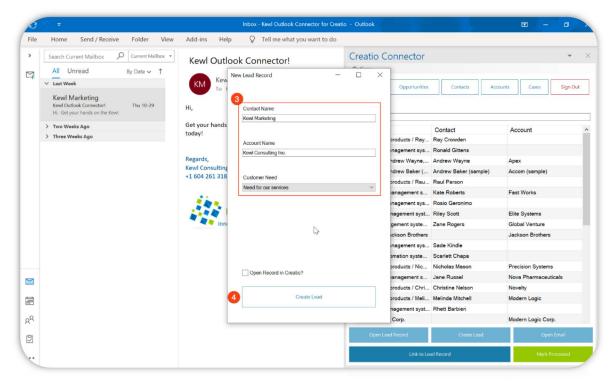
## Creating New Records in Creatio

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

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			Bulk email management sys Ronald Gi	ttens	
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		Kewl Consulting Inc. +1 604 261 3188	Hardware / Andrew Baker ( Andrew B	aker (sample) Accom (sample)	
		+1 604 261 3188	Need for our products / Rau Raul Pars	on	
			Opportunity management s Kate Robe	erts Fast Works	
			Bulk email management sys Rosio Ger	onimo	
		KewlConsultingInc	Marketing management syst Riley Scot	t Elite Systems	
		Innovative ideas – extraordinary results	Service management syste Zane Rog	ers Global Venture	
		www.kewlconsulting.com	Hardware / Jackson Brothers	Jackson Brothers	
			Bulk email management sys Sade Kind	lle	
			Workflow automation syste Scarlett C	hapa	
			Need for our products / Nic Nicholas	Mason Precision Systems	
M			Opportunity management s Jane Russ	sel Nova Pharmaceuticals	
-			Need for our products / Chri Christine I		
			Need for our products / Meli Melinda M		
			Marketing management syst Rhett Bar		
RR			Modern Logic Corp.	Modern Logic Corp.	
Ì				Create Lead Open Email	
			Link to Lead Record	Mark Processed	

- 3. Fill in the Fields
- 4. Click Create Lead



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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.

0	9 v	Inbox - Kewl Outlook Connector for Creatio	- Outlook		<b>E</b> - <b>C</b>
File	Home Send / Receive Folder View	Add-ins Help 🛛 🖓 Tell me what you want to do			
> []	Search Current Mailbox       Current Mailbox         All Unread       By Date > ↑         < Last Week       Marketing         Kewl Outlook Connector!       Thu 10-29         Hi, Get your hands on the Kewl       Hi,         > Two Weeks Ago       Get your hands on the Kewl Outlook Connector (Thu 10-29)         Hi, Get your hands on the Kewl Outlook Connector       Hi,         Get your hands on the Kewl Outlook Connector       Hi,         Hid Consulting Context       Thu 10-29         Kewl Consulting Inc.       +1 604 261 3188         State Consulting Inc.       +1 604 261 3188	Creatio Connector Options May Text Row Height Font Size Rom Height Font Size Rom Height Constructure Constructure Constructure Read Need for our products / Ray Crowden Bulk email management system / Kee Roberts, Fast Works Bulk email management system / Rosio Geronimo Markeing management Sutem Real Read Sutem Read Read Read Seconimo Read	Raul Parson	Cases Sign Out	
			Service management system / Zane Rogers, Global Venture	Zane Rogers	Global Venture
			Hardware / Jackson Brothers Bulk email management	s Sade Kindle	Jackson Brothers
			system / Sade Kindle Workflow automation system		
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Î			Open Lead Record	Create Lead	Open Email
			Link to L	ead Record	Mark Processed

#### 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.

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#### 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 <u>marketplace@kewlconsulting.com.</u>

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