

# Outlook Connector for Creatio

## User Guide

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# Getting Started

## ■ Requirements

The Creatio Connector requires one of the following versions of Outlook:

- Outlook 2013
- Outlook 2016
- Outlook 2019

The Creatio Connector is not compatible with Outlook in the browser or on mobile.

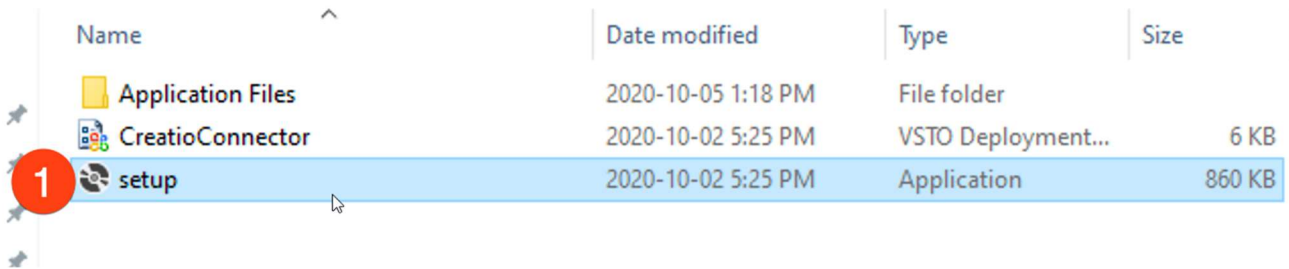
Connecting an Email from Outlook to a Record in Creatio requires the Email Account to be configured and receiving emails in both environments (Outlook and Creatio). Emails received in Creatio are handled as Activity records and it is the Activity that manages the connections created using the Connector.

## ■ Installation

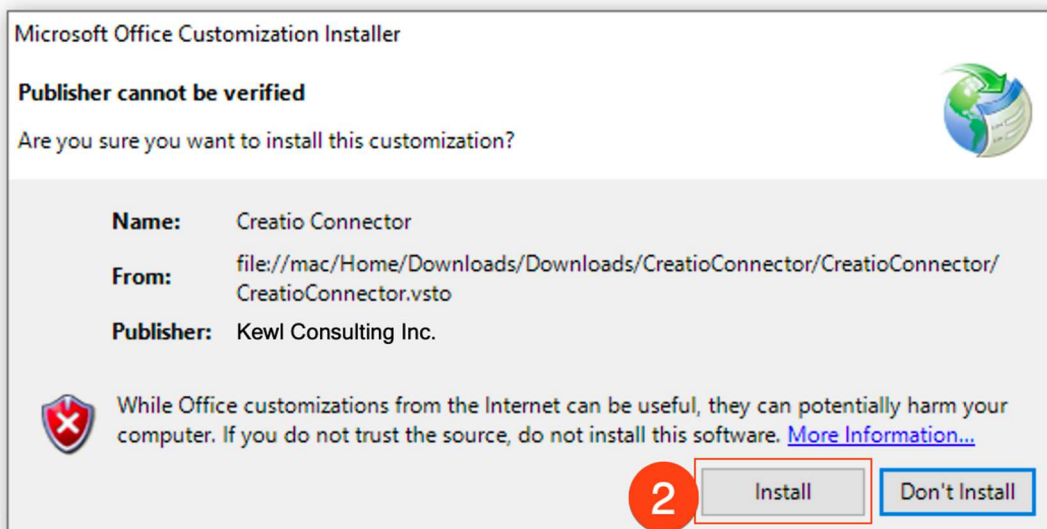
Download the .zip file containing the Outlook Connector from **here**.

Once the file has been downloaded, unarchive the zip file and follow the steps below.

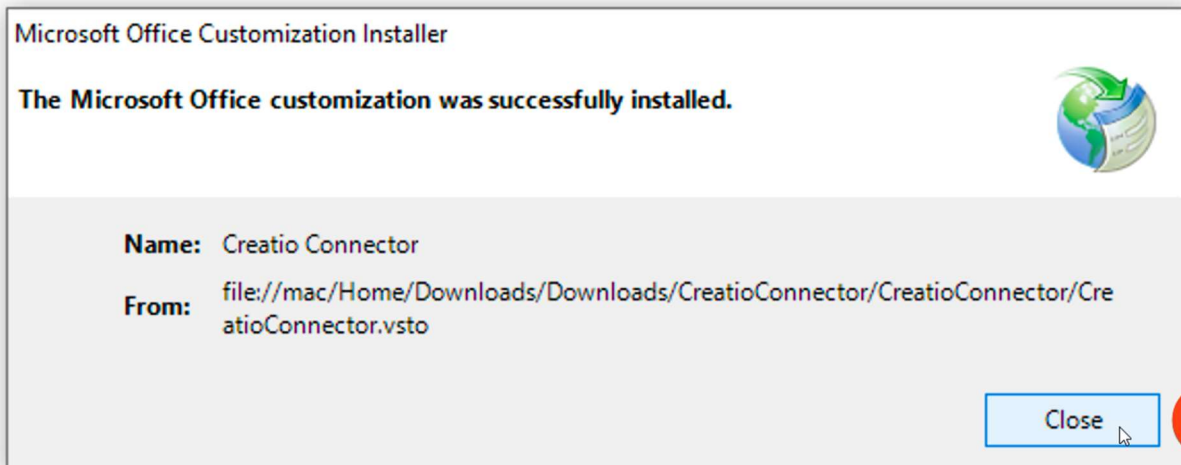
1. Run Setup.exe (1)



2. When prompted regarding the publisher, Kewl Consulting, accept the verification by clicking the Install button (2)

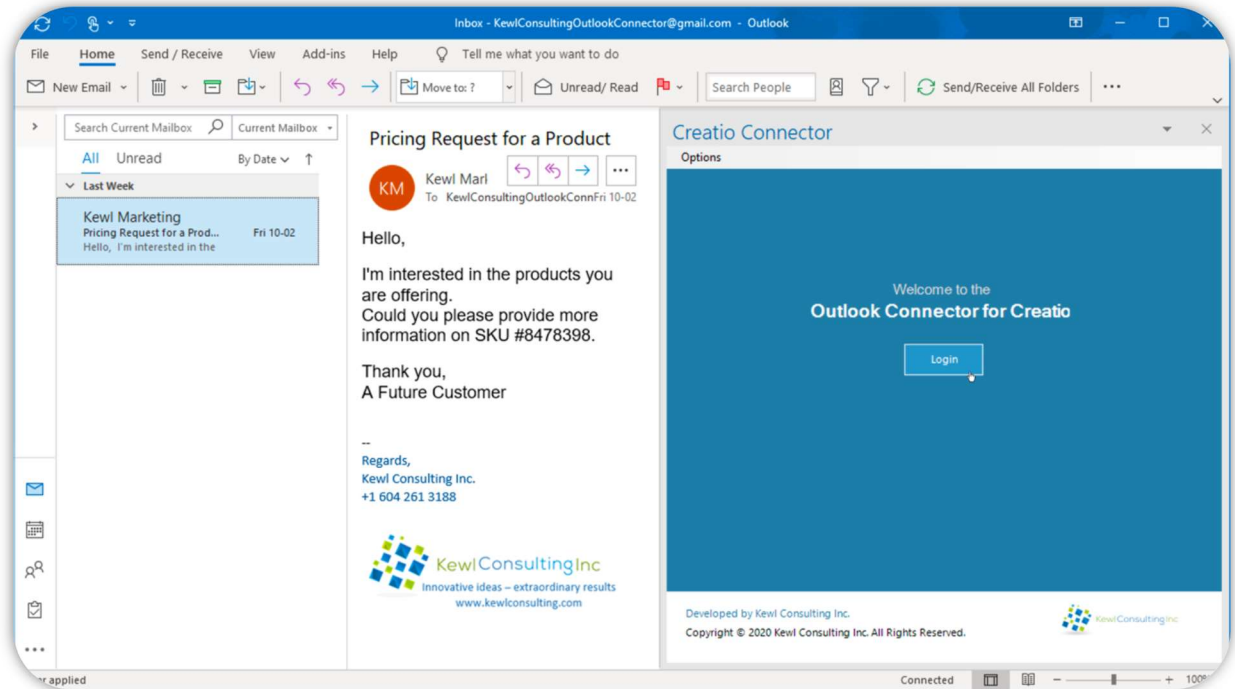


3. The installation will take a few moments, once complete the window can be closed (3)

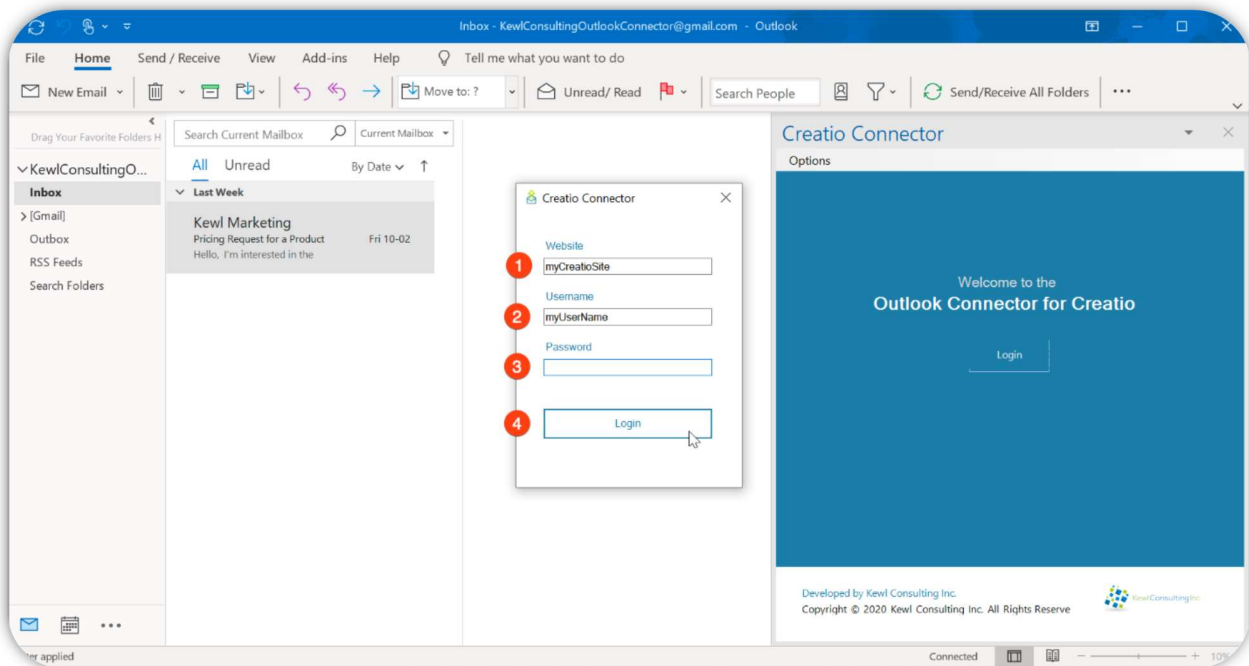


## ■ Signing into the Connector

Once installed, the add-on will be available as a panel on the right side of the Outlook window. The next step is to login to Creatio to validate your credentials. To initiate this process click the Login button.



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.



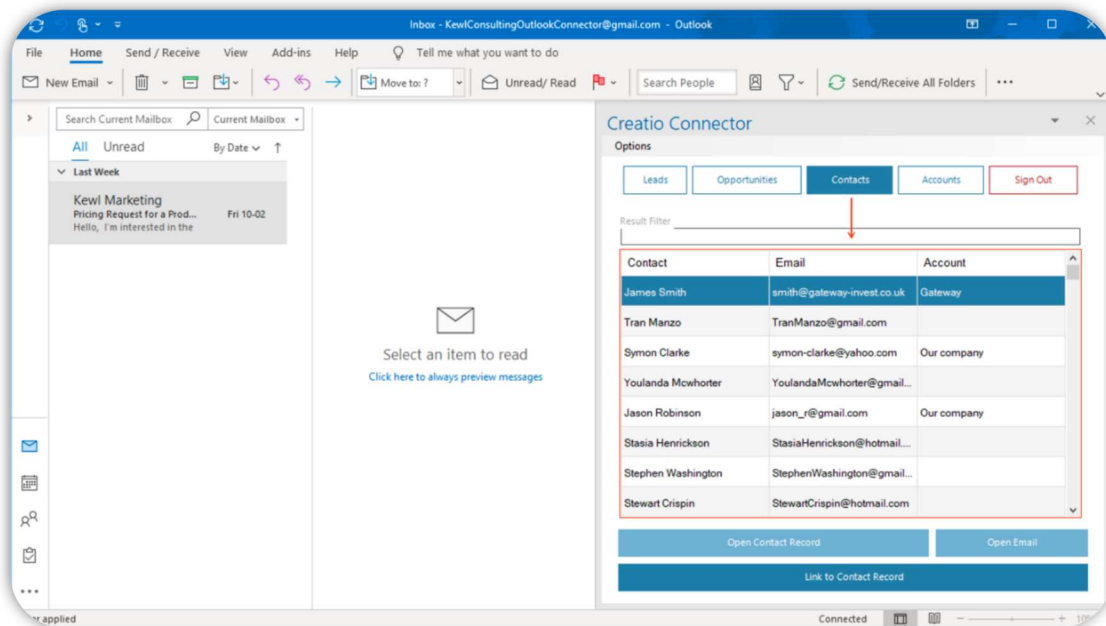
2. Add your Creatio Username just as you would when signing into the Creatio application
3. Enter your Creatio Password
4. Press the Login button

If login is successful, the Website and Username will be saved automatically and only the Password will be required for future sign in attempts.

## User Interface

### ■ Navigating Sections

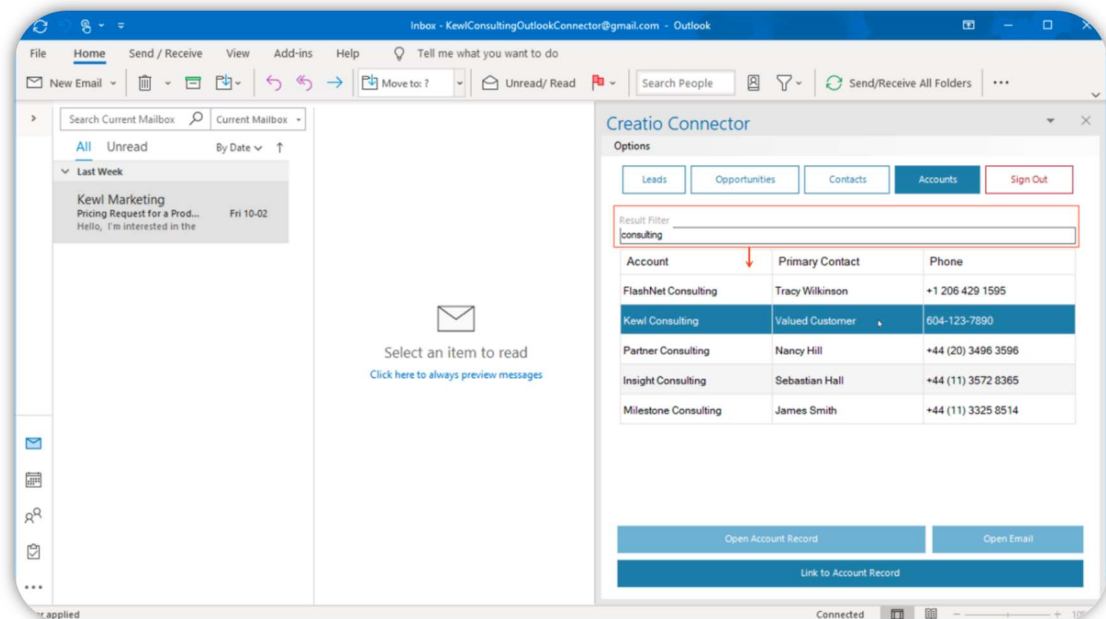
To view the results of a specific Section, click the respective section button at the top of the panel.



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.

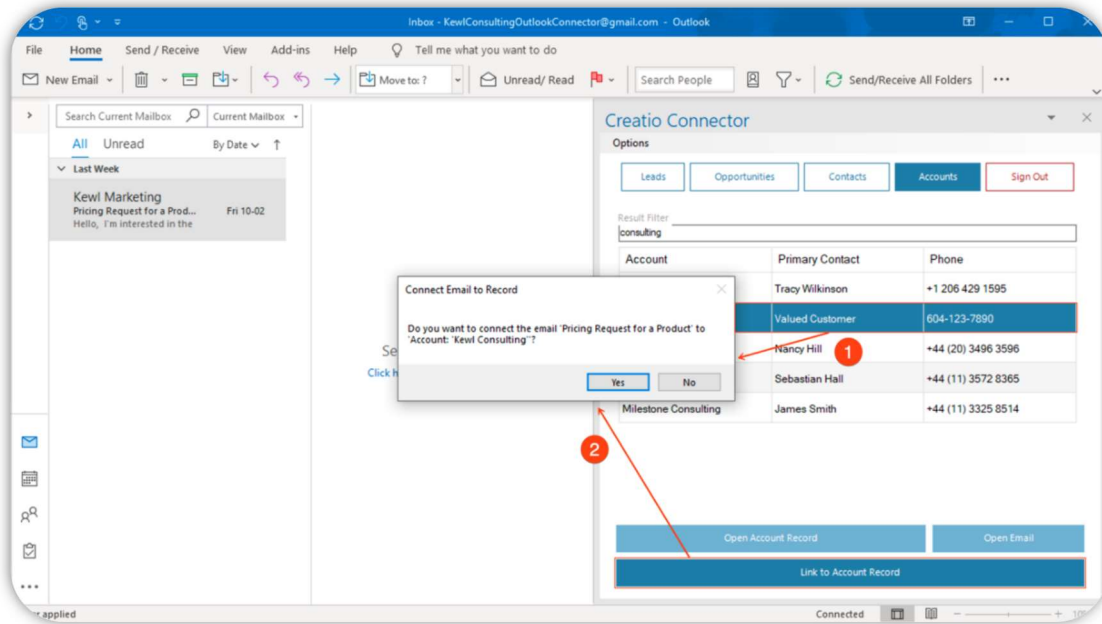


# Connecting Records

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

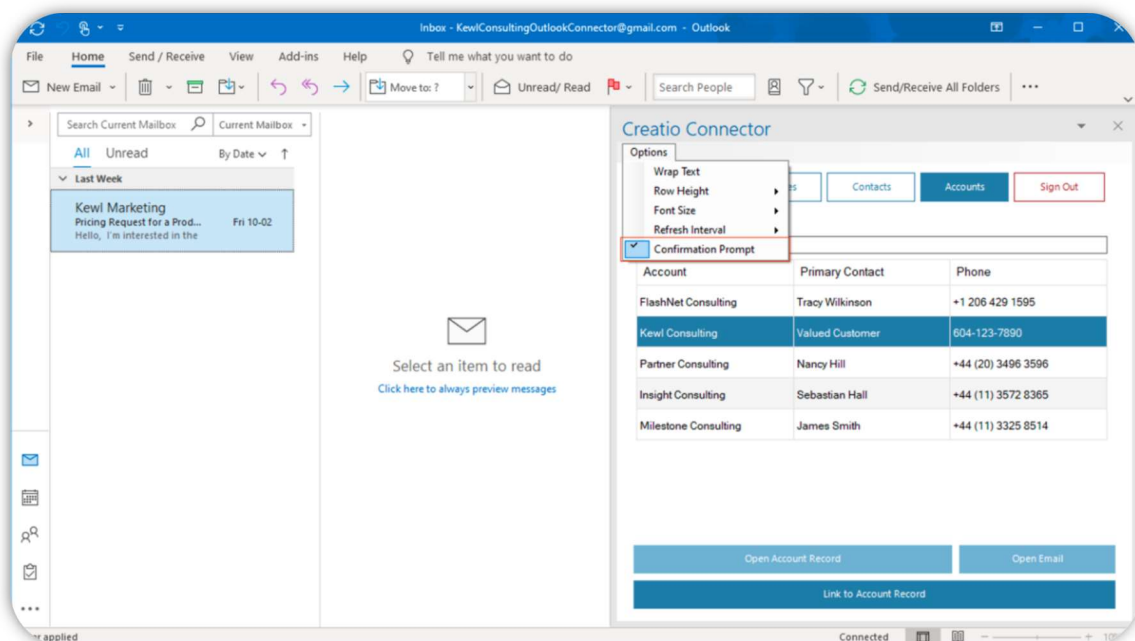
1. Double-click the desired record
2. Select the record from the list and click the Link to Record button

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



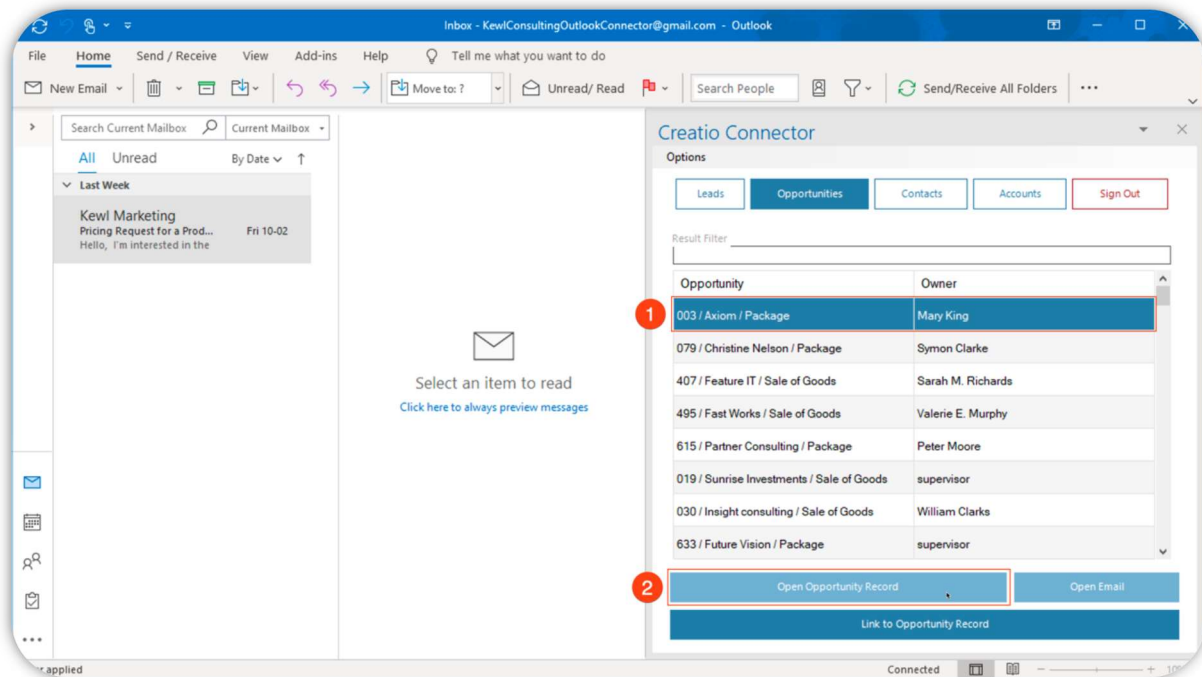
Clicking the **Yes** button confirms the connection which will then proceed to connect the email to the record. While clicking the **No** button will simply cancel the connection process.

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.

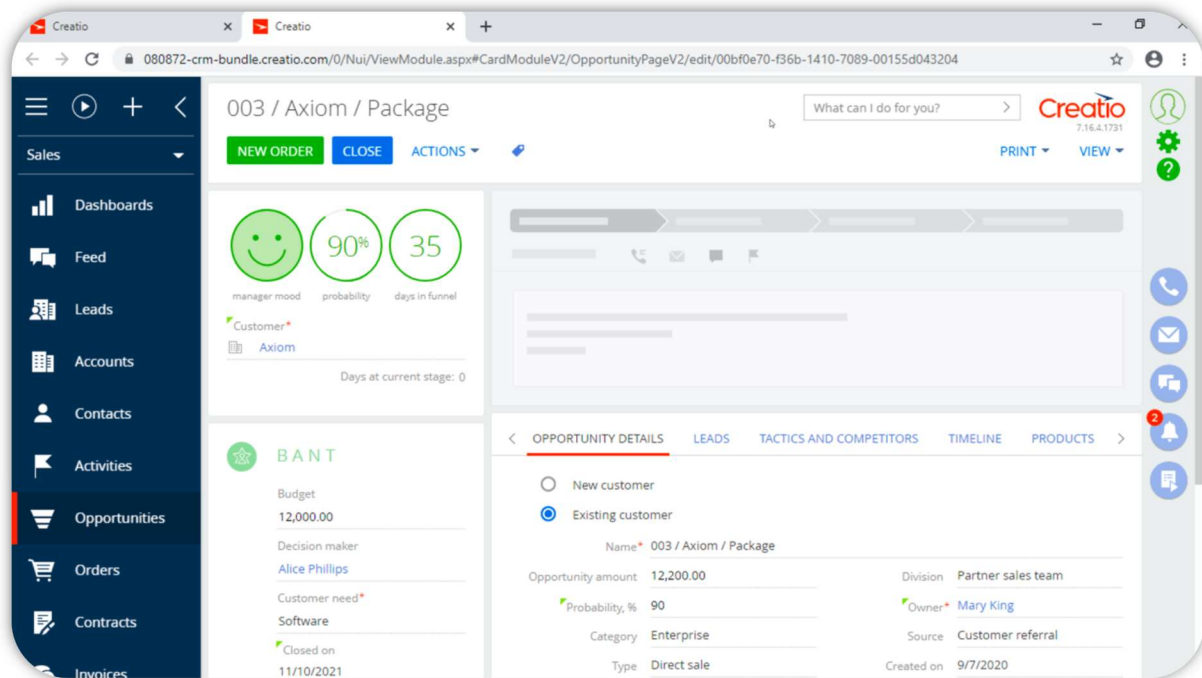


## Opening the Selected Record

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.



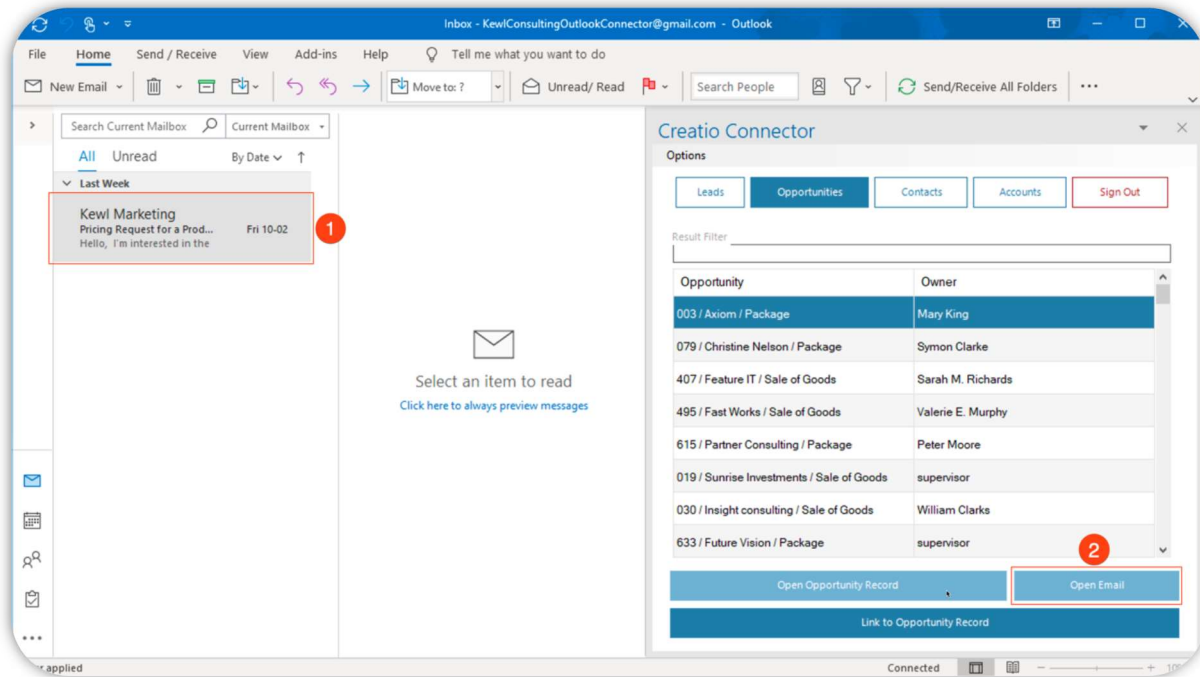
A browser window will open to the selected record in Creatio.



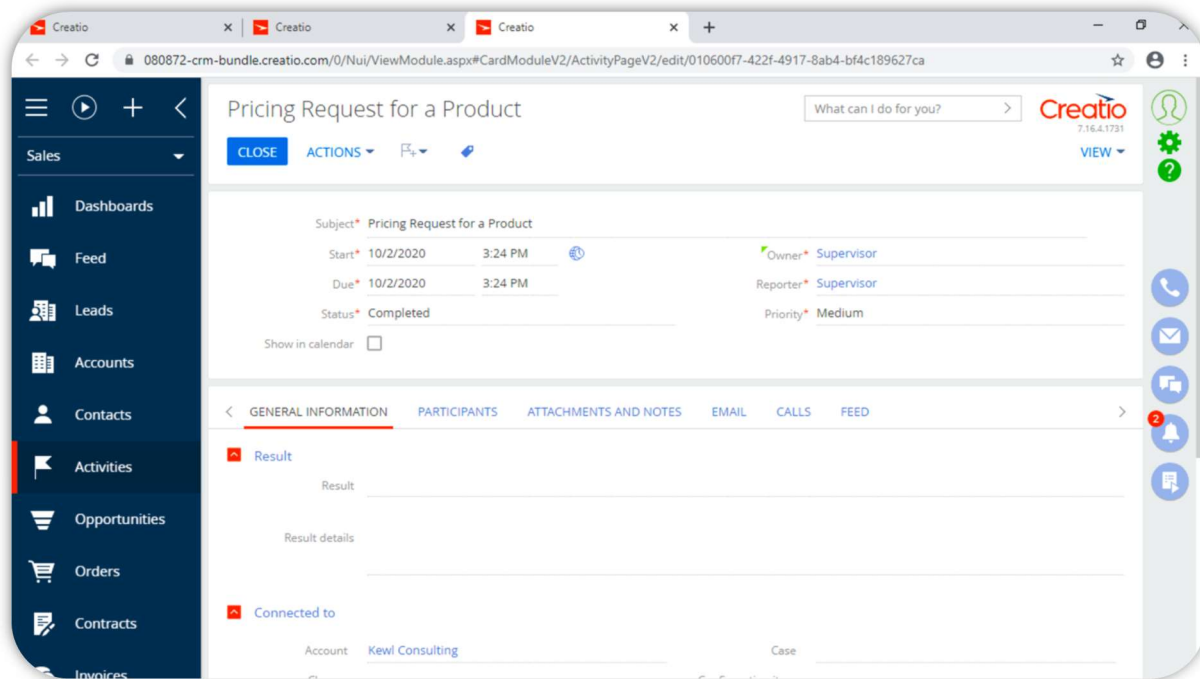


# Opening the Selected Email

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.





# Record Permissions and Security

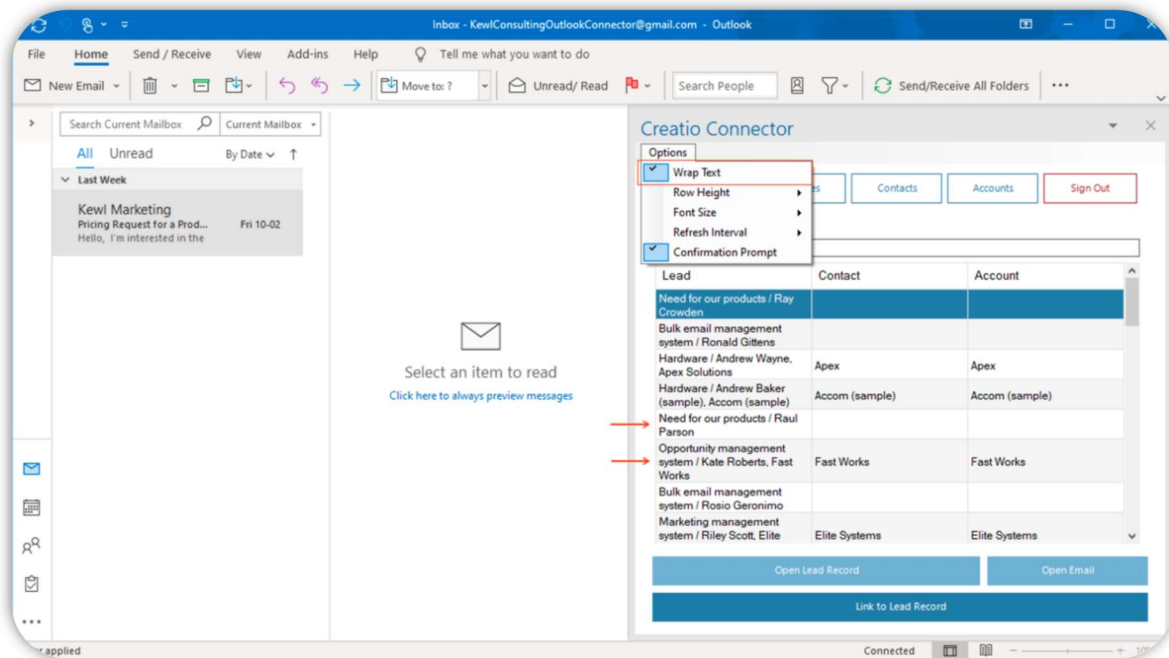
Access to system records is not managed by the add-on but through Creatio's Permissions. The same permissions that apply within the Creatio application will apply within the Connector. Therefore, if a user does not have access to certain records in Creatio they will not have access in the Connector.

## Options

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

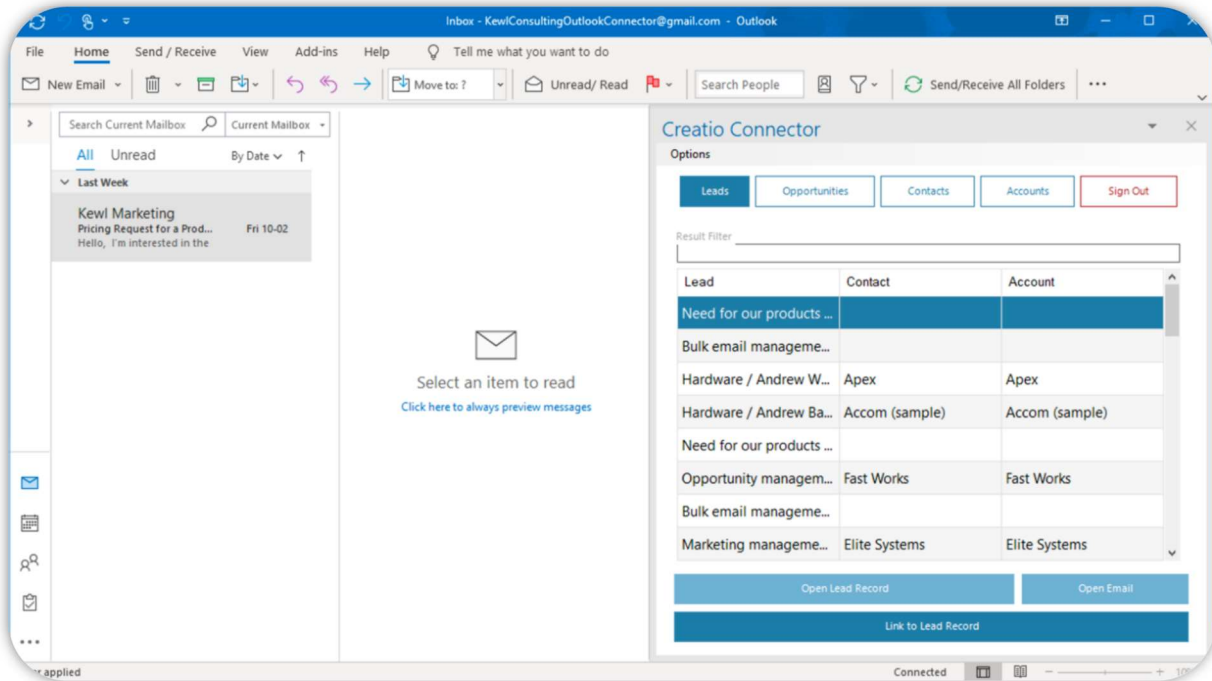
- **Word Wrap**

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.



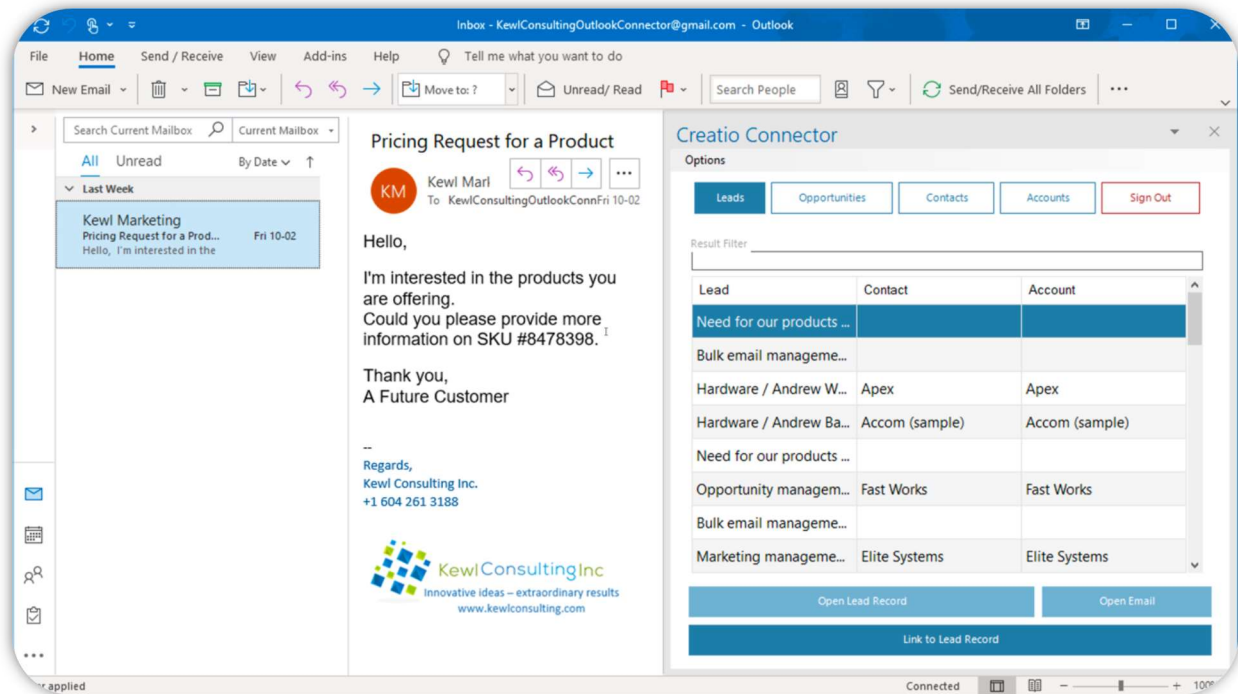
## ■ Row Height

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



## ■ Font Size

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



## Support

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Support is available by email by contacting [support@kewlconsulting.com](mailto:support@kewlconsulting.com).

Email support is available between the hours of 8:00 am and 5:00 pm Pacific time, weekdays with an expected 48-hour response during working hours.