

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

Install the app

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

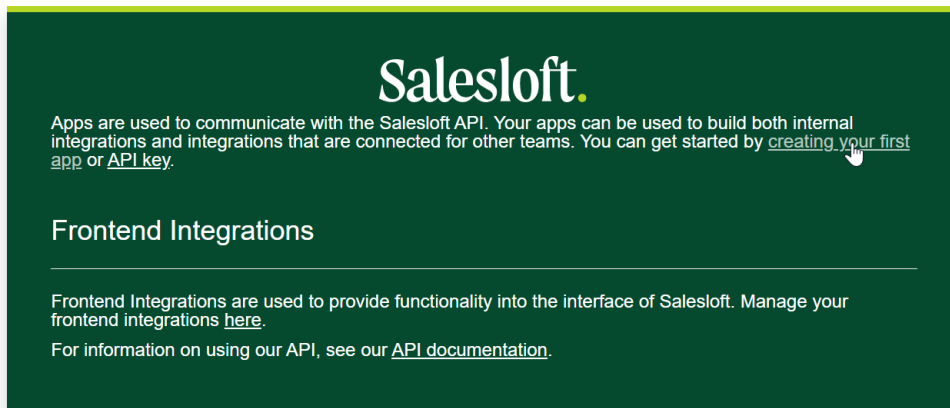
If you use Creatio on-site, make sure that Creatio can access the Internet. To do this:

- 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>

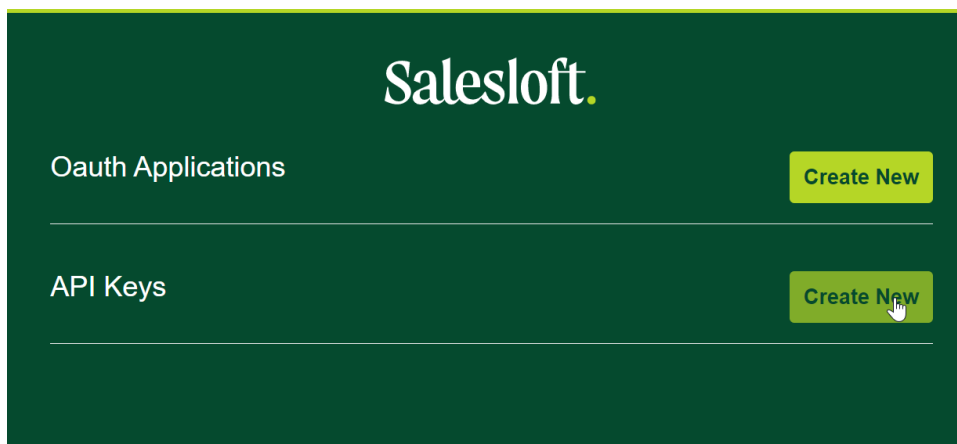
Connect the app to Salesloft

Create Salesloft API keys and add them to Creatio


1. Open Salesloft integration settings: <https://accounts.salesloft.com/oauth/applications>
2. Click [*Creating your first app*].



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. Click [*Submit*]. This opens a new page.
6. Save the "Application Id" and "Secret" values on the page that opens.
7. 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.
8. Return to the to the Salesloft integrations settings and click [*Create New*] in the "API Keys" block:



9. Enter an arbitrary name of the integration in the [*Name*] field. For example, "Creatio app."
10. Click [*Submit*]. This opens the API key page.

11. Copy the key and specify it in the "Admin Token" ("DlbSalesloftAdminToken" code) [Creatio system setting](#).
12. Click  to open the System Designer.
13. Go to the [*Import and integration*] block → [*Connect to Salesloft*] and follow the instructions.

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:



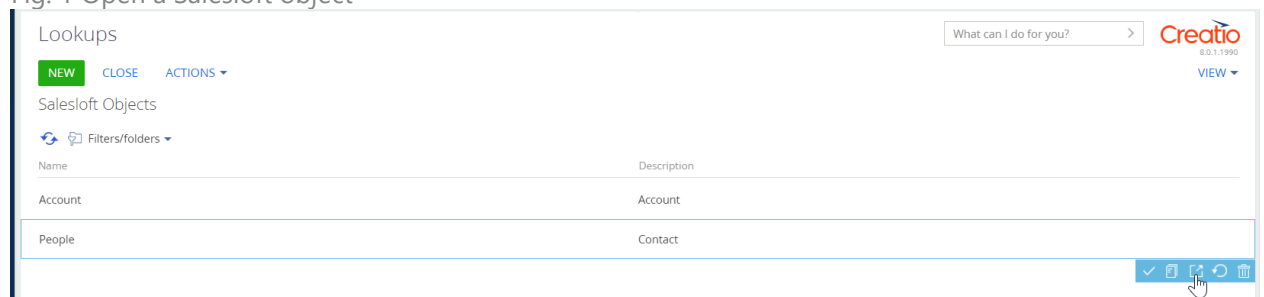


1. Click  to open the System Designer.
2. Go to the [*System setup*] block → [*Lookups*].
3. Open the [*Salesloft Objects*] lookup.
4. Select an object on the lookup content page and click  (Fig. 1). This opens a new page.

Fig. 1 Open a Salesloft object



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 lookup does not include the [*Owner*] column. However, the app still sends the column to Salesloft by default.

Send records to Salesloft and Cadence

The app can send contact and account data to Salesloft.

Note. You can also send lead records. However, when you do this, Creatio sends the records of contacts connected to the lead to Salesloft.

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. The records must not have duplicates.

If a record does follow any condition, the app sends a warning in a dialog when sending a single record and warning 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.



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➤ [Send to SalesLoft](#)



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" ("DlbAutoCreateAccountForContact" code) system setting.

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

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*].



Send to Cadence

Salesloft Id

46842591

Auto update



Update

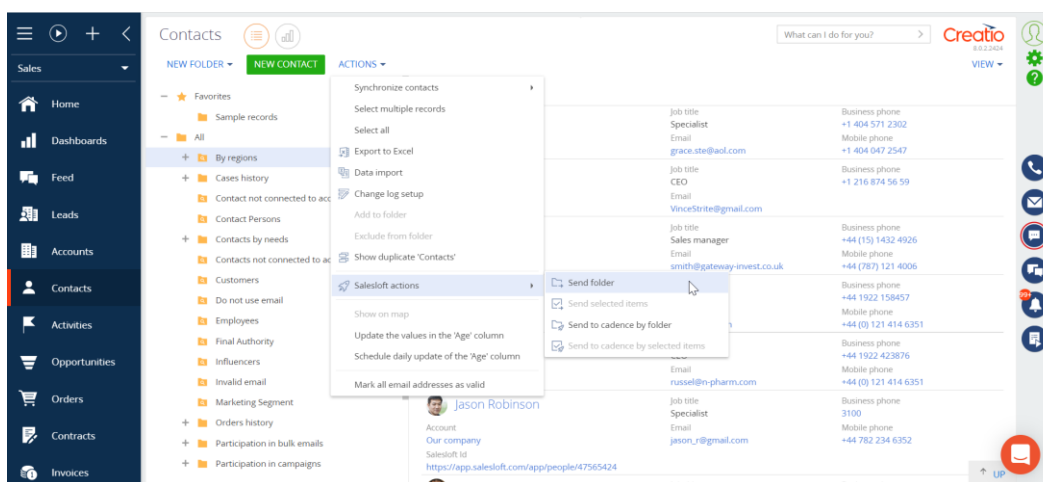
You can disable the automatic record updates in the “Auto update record in Salesloft” (“DlbAutoUpdateRecordSL” code) system setting.

Send records in bulk

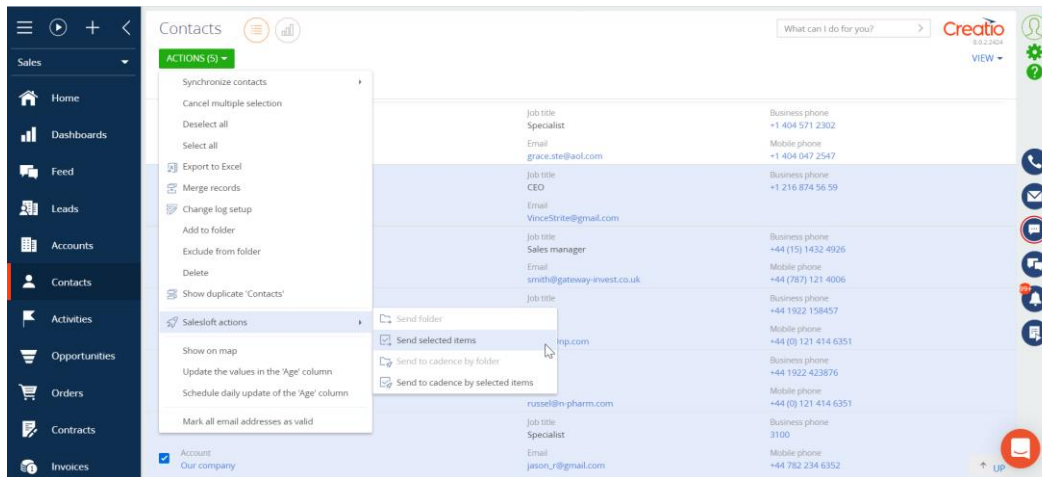
Note. This action is available only for the [*Contacts*] and [*Leads*] objects.

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, Salesloft updates them.

Add records to Cadence

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

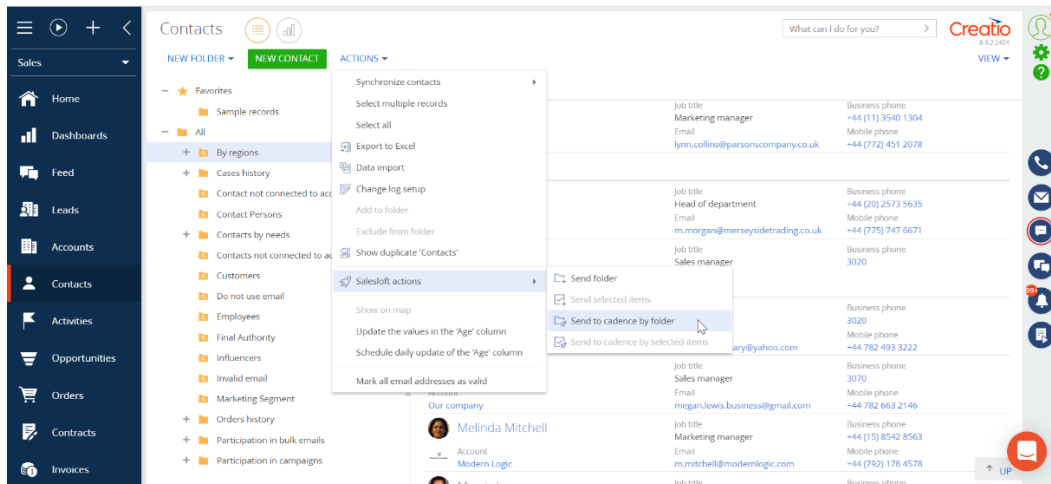
You can add records to Cadence in Salesloft directly from Creatio.

To send an individual record to Cadence:

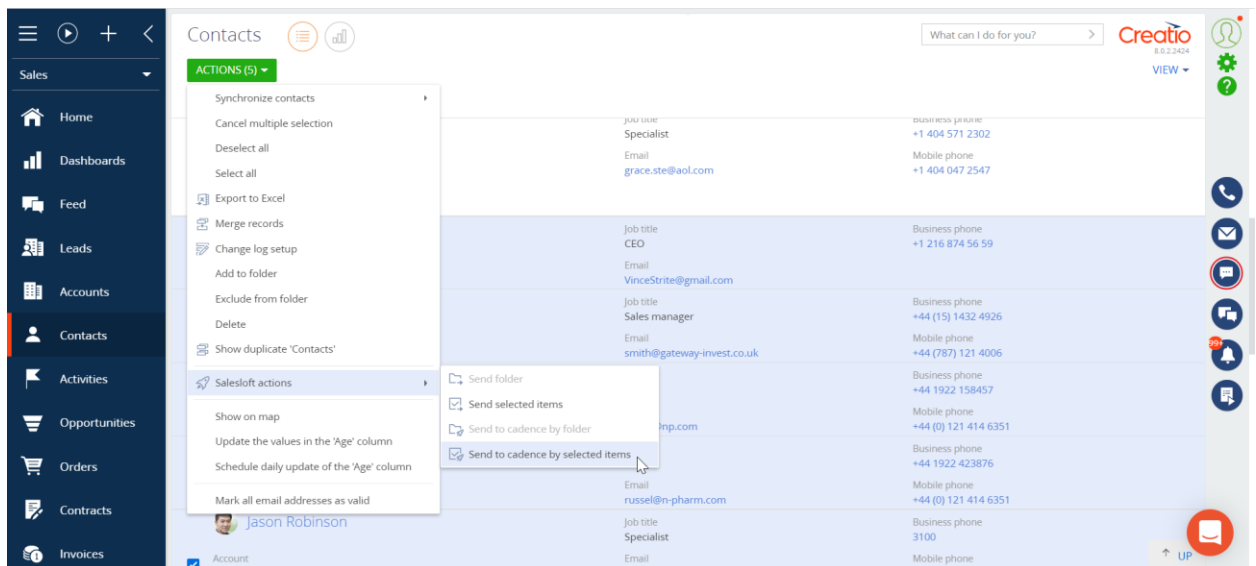
1. Open the record page.
2. Click [*Send to Cadence*] in the Salesloft app. This opens a window.
3. Select Cadence in the window that opens. This opens another window.
4. Select the Cadence step in the window that opens.

To send records to Cadence in bulk:

1. Open the section list.
2. Select records to send to Cadence manually or from a folder.
 - 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.
 - Select [*Send to cadence by folder*] in the submenu to add **all records** that meet the filter conditions to the email audience.



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



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.

Salesloft field mapping

Make sure you match the Salesloft fields to the corresponding Creatio fields. View the corresponding fields for Contact and Account objects below.

Contact object

Salesloft	Creatio
id	Id
created_at	CreatedAt
updated_at	UpdatedAt
last_contacted_at	LastContactedAt
last_replied_at	LastRepliedAt
first_name	FirstName
last_name	LastName
display_name	DisplayName
email_address	EmailAddress
full_email_address	FullEmailAddress
secondary_email_address	SecondaryEmailAddress
personal_email_address	PersonalEmailAddress
phone	Phone
phone_extension	PhoneExtension
home_phone	HomePhone
mobile_phone	MobilePhone
linkedin_url	LinkedinUrl
title	Title
city	City
state	State
country	Country
work_city	WorkCity
work_state	WorkState
work_country	WorkCountry
crm_url	CrmUrl
crm_id	CrmId
crm_object_type	CrmObjectType
owner_crm_id	OwnerCrmId
person_company_name	PersonCompanyName
person_company_website	PersonCompanyWebsite
person_company_industry	PersonCompanyIndustry
do_not_contact	DoNotContact
bouncing	Bouncing
locale	Locale
eu_resident	EuResident
personal_website	PersonalWebsite
twitter_handle	TwitterHandle

last_contacted_type	LastContactedType
job_seniority	JobSeniority
custom_fields	CustomFields
tags	Tags
contact_restrictions	ContactRestrictions
counts	Counts
account	Account
last_contacted_by	LastContactedBy
import	Import
person_stage	PersonStage
most_recent_cadence	MostRecentCadence
last_completed_step_cadence	LastCompletedStepCadence
last_completed_step	LastCompletedStep
account_id	AccountId

Account object

Salesloft	Creatio
id	Id
created_at	CreatedAt
updated_at	UpdatedAt
archived_at	ArchivedAt
name	Name
domain	Domain
conversational_name	ConversationalName
description	Description
phone	Phone
website	Website
linkedin_url	LinkedinUrl
twitter_handle	TwitterHandle
street	Street
city	City
state	State
postal_code	PostalCode
country	Country
locale	Locale
industry	Industry
company_type	CompanyType
founded	Founded
revenue_range	RevenueRange
size	Size
crm_id	CrmlId
crm_url	CrmUrl
crm_object_type	CrmObjectType

owner_crm_id	OwnerCrmlId
last_contacted_at	LastContactedAt
last_contacted_type	LastContactedType
do_not_contact	DoNotContact
custom_fields	CustomFields
tags	Tags
counts	Counts
owner	Owner
creator	Creator
last_contacted_by	LastContactedBy
last_contacted_person	LastContactedPerson
company_stage	CompanyStage
account_tier	AccountTier
account_tier_id	AccountTierId

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 stats in the [*Salesloft integration*] module in Creatio:

 SALESLOFT INTEGRATION ×

 Send to Cadence

Salesloft Id
53898512

Auto update

 Update

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