Salesroom in Creatio

Important! The Salesroom connector for Creatio works exclusively: Platform version: 8.2.0 and up Configuration: Creatio Sales Interface: Freedom UI Platform: .NET Framework Deployment: Cloud

Installing package and customizing

1. Install packages from Marketplace: open the Application Hub and click the New application



2. Select "Install from file"



- 3. Select the provided zip archive of the package
- 4. Go to the Lookup section. Open the "Webhook entities" lookup



5. Add a record with Object name "Opportunity" to lookup "Webhook entities"

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Note: after adding this record, Creatio cache may still block requests for Opportunity creation for up to an hour

- 6. Go to the Opportunities section
- 7. in the "Import: menu, select "Web forms and pages"

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Lookups	3 407 / Feature IT / Sale of Goods	Qualification		Feature IT	87,000.00
👩 Message templates	4 495 / Fast Works / Sale of Goods	Closed won		Fast Works	139,900.00
A MI models	5 615 / Partner Consulting / Package	Presentation		Partner Consulting	1,500.00
ML models	6 019 / Sunrise Investments / Sale of Goods	Presentation		Sunrise Investments	13,533.60
😴 Opportunities	7 030 / Insight consulting / Sale of Goods	Qualification	Partner sale	Insight Consulting	9,059.70
	8 633 / Future Vision / Package	Proposal		Future Vision	6,750.00
homepage	9 485 / Feature IT / Sale of Goods	Proposal		Feature IT	167,900.00

8. Select "Other landing pages" followed by "Click to get your Webhook URL"

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Orders	2 Map the web form fields to the Creatio of	oject fields. Learn more,				
Playbooks	3 Get the Webhook URL and use it to send	submitted form data to Creatio. Learn more,				
Process library	Click to get your Webhook URL					

9. Save the URL which has been generated

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	WordPress.com Other landing pages	Import landing page data to Creatio					
Order and Contract homepage		Use the guide below to connect your web form to Creatio: Create a new or use an existing landing page with a web form on your website.					
Grders		2 Map the web form fields to the Creatio object fields. Learn more,					
Playbooks		3 Get the Webhook URL and use it to send submitted form data to Creatio. Learn more.					
Process library		Webhook URL https://webhooks.creatio.com/webh :5L					

10. Go to your Saleroom app, <u>https://app.salesroom.com</u> webhook settings.

▦	Details	Creatio Sy Manage Crea	ync Settings tio Sync settings									
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۵ م	Al Assistant	General	Custom Prompts	API Configuration								
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11. Add a webhook, set the url to the one saved in the step 9

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New Meeting 💫 🗸	General Custom Prompts API Configuratio	Create a Webhook	
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() Recent		https://webhooks.creatio.com/webhooks/b7! 3a	
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12. Check required events, click Create



Once this is done, webhook events that Salesrooms triggers will be sent to Creatio and create or update Opportunity.

View meeting results in Creatio

1. Go to the Opportunities section

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-	1 Meeting (r3793)	Qualification		salesroom@librasoft.group	1/30/2025 1:12 PM						
Opportunities	Cet to know Salesroom	Qualification		salesroom@librasoft.group	1/30/2025 1:12 PM						

The submitted data is displayed: meeting title (to Opportunity title), meeting summary (to Opportunity details), meeting creation date (to Opportunity creation date), and meeting organizer (to Opportunity created by, contact is searched by the email; if no match is found, a new contact is made)



2. Click the Name to open Opportunity page