

# Salesroom in Creatio

*Important! The Salesroom connector for Creatio works exclusively:*

*Platform version: 8.2.0 and up*

*Configuration: Creatio Sales*

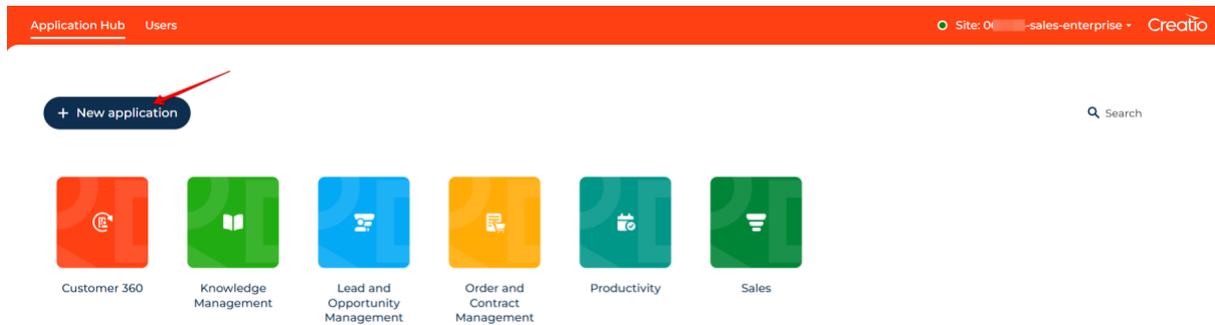
*Interface: Freedom UI*

*Platform: .NET Framework*

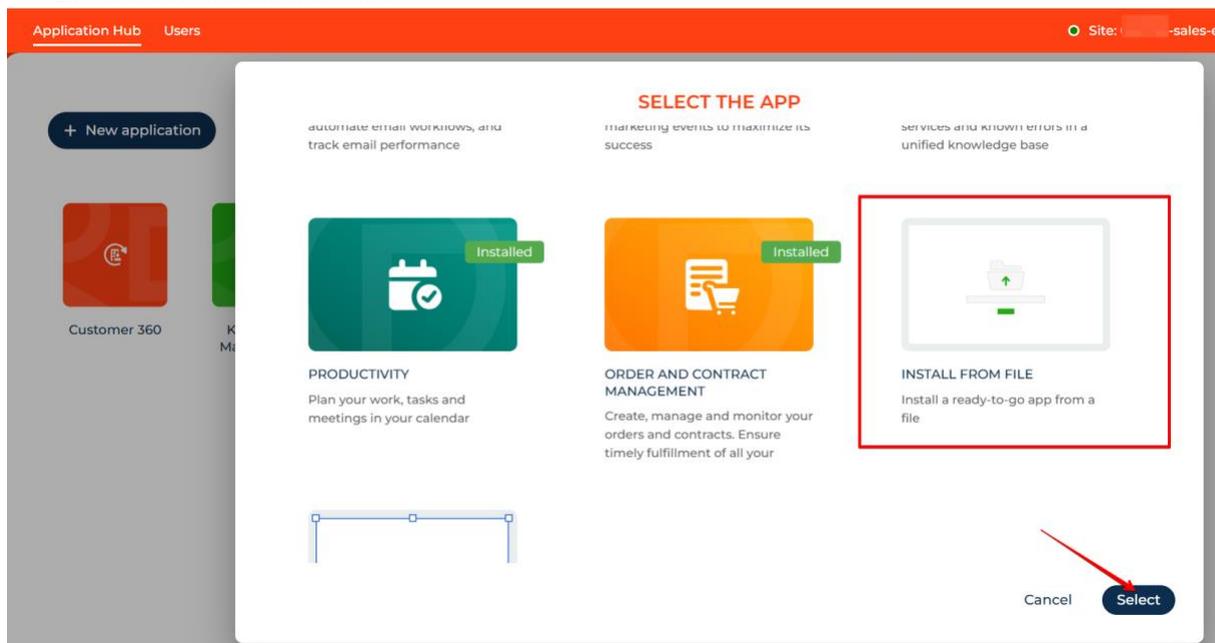
*Deployment: Cloud*

## Installing package and customizing

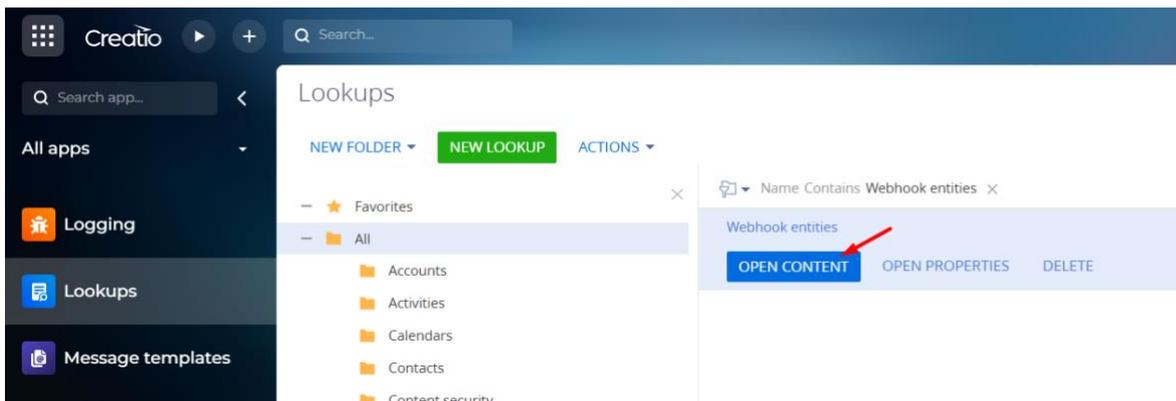
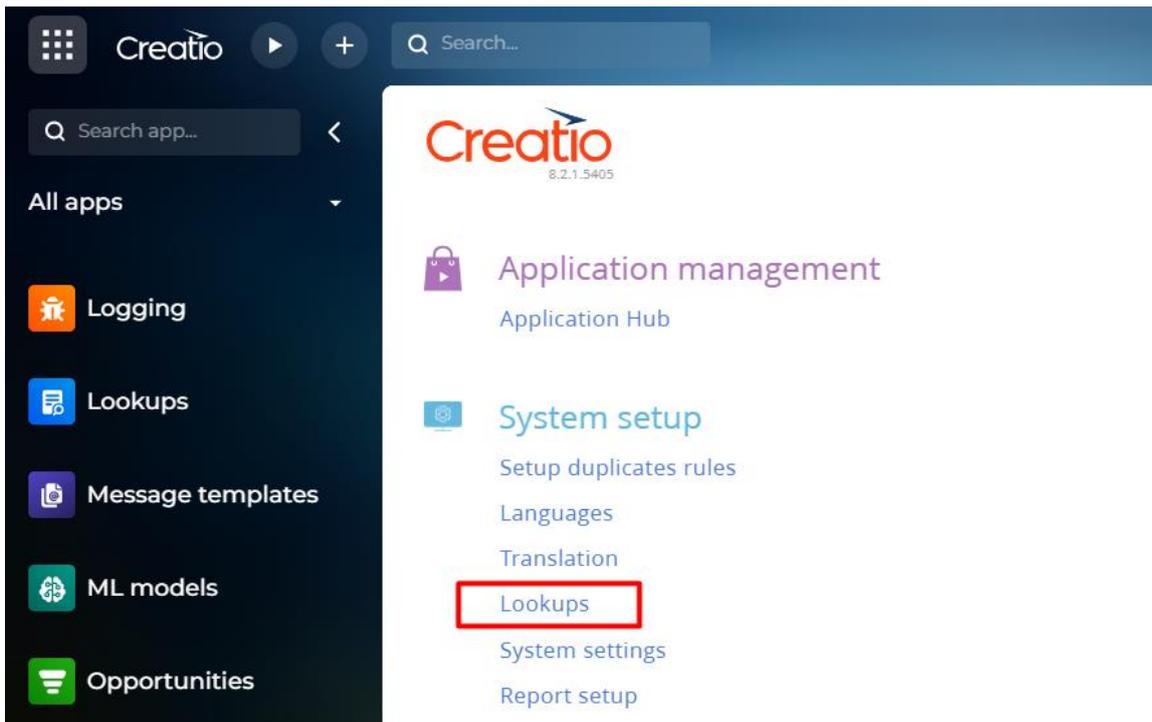
1. Install packages from Marketplace: open the Application Hub and click the New application



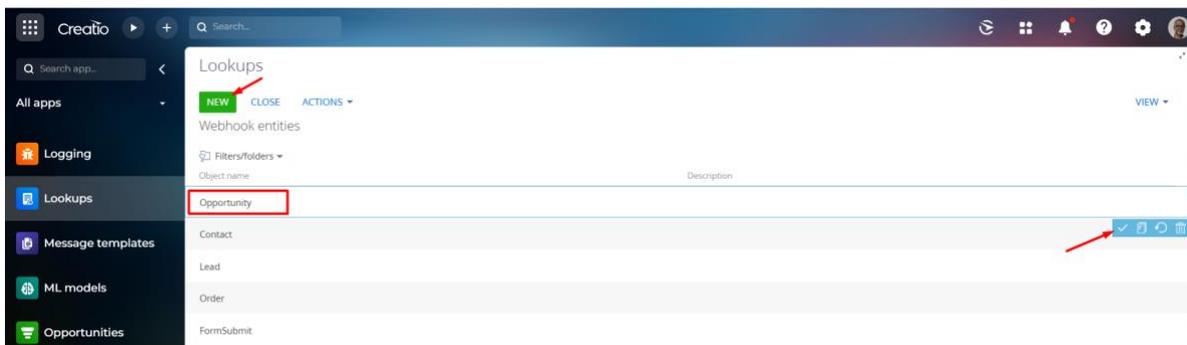
2. Select "Install from file"



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"

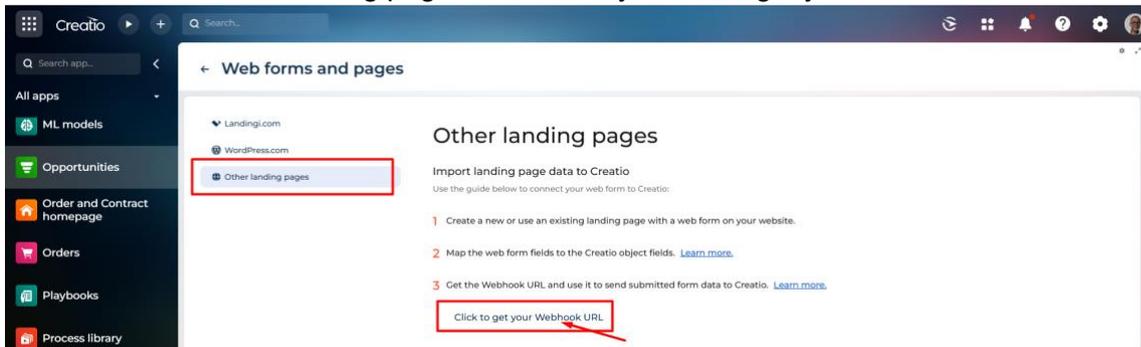


Note: after adding this record, Creatio cache may still block requests for Opportunity creation for up to an hour

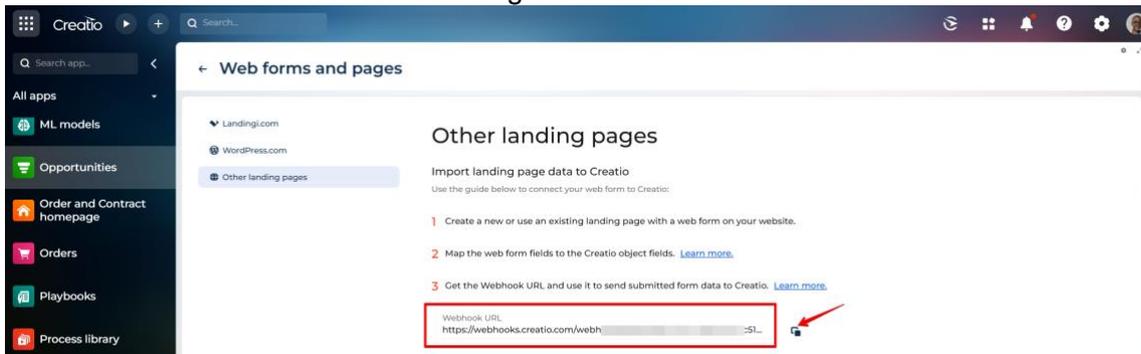
6. Go to the Opportunities section
7. in the "Import: menu, select "Web forms and pages"

Name	Stage	Sales channel	Contact	Account	Value
003 / Axiom / Package	Contracting	Direct sale		Axiom	12,200.00
079 / Christine Nelson / Package	Presentation	Direct sale		Build Technologies	670.00
407 / Feature IT / Sale of Goods	Qualification			Feature IT	87,000.00
495 / Fast Works / Sale of Goods	Closed won			Fast Works	139,900.00
615 / Partner Consulting / Package	Presentation			Partner Consulting	1,500.00
019 / Sunrise Investments / Sale of Goods	Presentation			Sunrise Investments	13,533.60
030 / Insight consulting / Sale of Goods	Qualification	Partner sale		Insight Consulting	9,059.70
633 / Future Vision / Package	Proposal			Future Vision	6,750.00
485 / Feature IT / Sale of Goods	Proposal			Feature IT	167,900.00

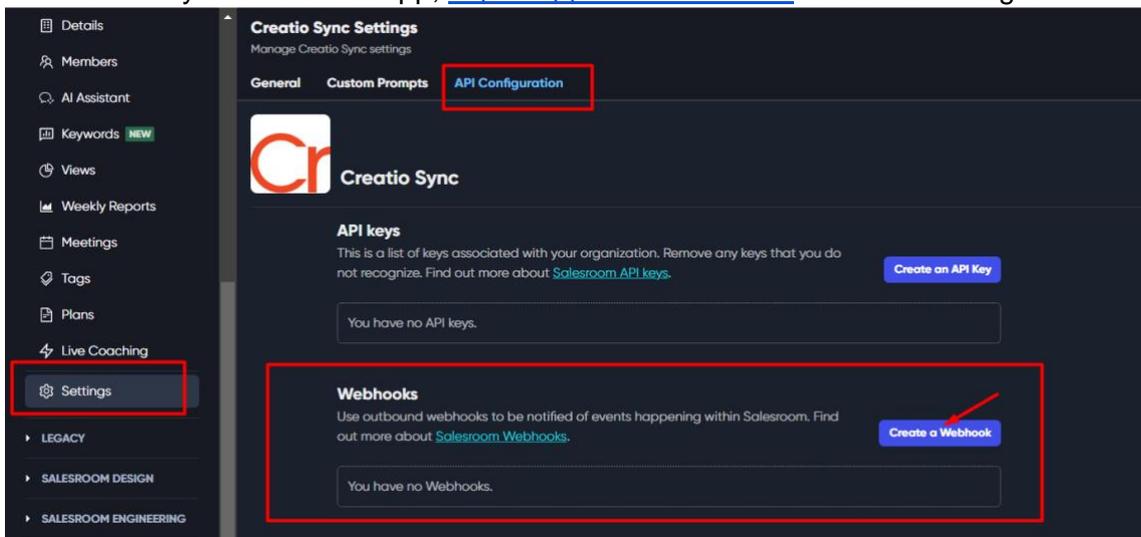
8. Select “Other landing pages” followed by “Click to get your Webhook URL”



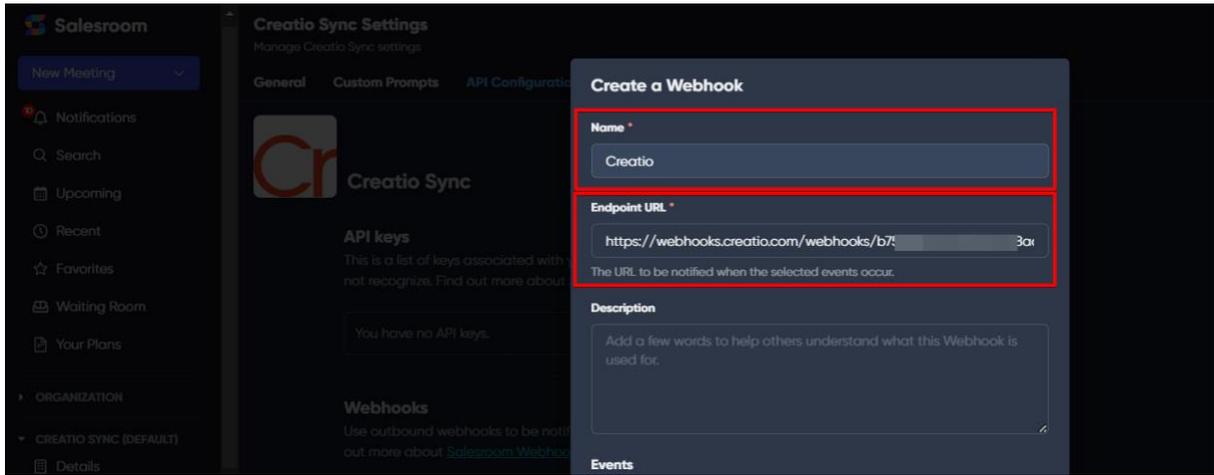
9. Save the URL which has been generated



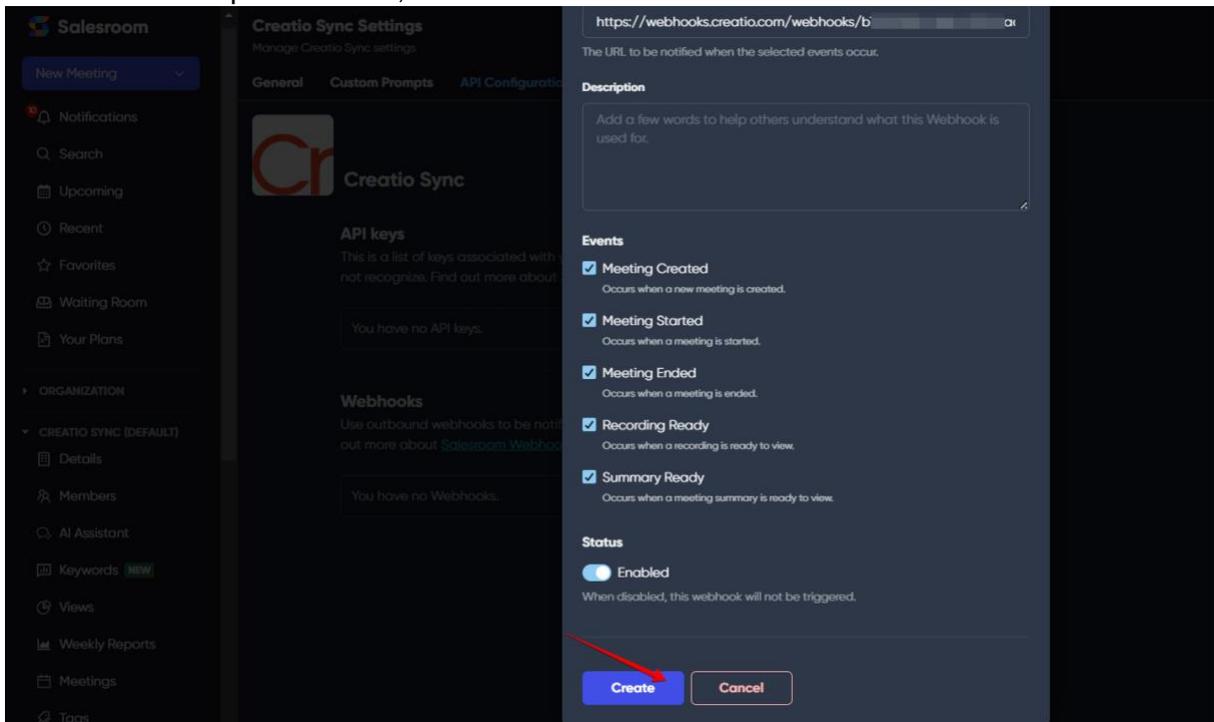
10. Go to your Saleroom app, <https://app.salesroom.com> webhook settings.



11. Add a webhook, set the url to the one saved [in the step 9](#)



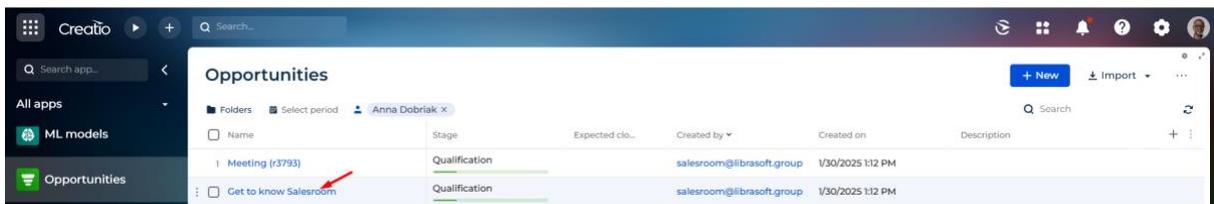
12. Check required events, click Create



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



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

