Wiza LinkedIn Integration

To install the app, follow the instructions in Creatio documentation: <u>Install apps</u> <u>from the Marketplace.</u>

Download the Wiza connector for Creatio app via the following link: <u>https://marketplace.creatio.com/app/wiza-linkedin-integration</u>

Set up the app

First, create Wiza API key and add them to Creatio.

- 1. Connect the webhook service to Creatio.
 - 1.1 Open the needed section. For example, **Contacts**.
 - 2.1 Click **Data import** \rightarrow **Web forms and pages** in the top right.
 - 3.1 Get the Webhook URL. To do this, click Wiza \rightarrow Click to get your Webhook URL

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WordPress.com	S WIZA
🏩 Wiza	Use Wiza to import accounts and contacts from Linkedin Sales Navigator
Other landing pages	Use the guide below to connect Wiza to Creatio:
	ិLog in into Wiza. 🕐
	2 Install Wiza extention for Google Chrome.
	3 Get the Webhook URL and use it to connect Wiza to Creatio.
	Click to get your Webhook Up
	4 Open LinkedIn Sales Navigator. 🙂

← Web forms and pages

Webhook URL is copied automatically.

- 2. Open the Wiza API settings: https://wiza.co/app/settings/api
- 3. Paste copied value into "Webhook URL" field.
- 4. Click [Save].
- 5. Copy API Key.
- 6. Return to **Web forms and pages** in Creatio. Paste API Key into "Wiza API Key" filed.
- 7. Click [Save].

8. Also, Wiza API Key can be populated in "Wiza API Key" ("WizaApiToken" code) system setting.

Second, specify how Wiza data is going to interact with your existing Creatio records. Manage the procedure in the "Overwrite existing data with data from Wiza" ("WizalsOverrideData" code) system setting.

This setting specifies whether Wiza data replaces existing data or overwrites it:

- When disabled (default), Creatio imports Wiza data only if the corresponding field is empty.
- When enabled, Creatio overwrites existing data with Wiza data.

Third, configure the app lookups.

Lookups for **accounts**:

• **Wiza industries**. Maps base values of industries from Wiza to values in Creatio.

Wiza number of account employees. Maps values of the number of account employees in Wiza to values in Creatio. Define the employee number range and map it to the values of the "No. of account employees" lookup. The import process handles values from Wiza and compares it to the range in Creatio.

• **Wiza revenue**. Maps values of the annual revenue in Wiza to values in Creatio. Define the revenue range. The import process handles values from Wiza and compares it to the range in Creatio.

Note. If the import process does not find mapped values, Creatio does not populate the corresponding account fields.

Account import

Note. You can import an account record only if you connect a Wiza account to Creatio.

Field mapping between Wiza and Creatio is non-editable.

- 1. Open the LinkedIn Sales Navigator.
- 2. Search accounts utilizing internal filters.
- 3. Once search is done, click on [Export accounts with Wiza].

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4. Following the steps in Wiza, start the scraping.

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	Skip duplicates ①		Next step >	

- 5. Once data processing is finished, Wiza sends the Webhook to Creatio.
- 6. As a result, Creatio will populate the following fields:
 - "Name"
 - "Industry"
 - "Annual revenue"
 - "No. of employees"

Also, Creatio populates phone, web, and social network links in the **Communication options** component and addresses (Country, State, City, Street) in the **Address** expanded list.

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Contact import

Note. You can import a contact record only if you connect a Wiza account to Creatio.

Field mapping between Wiza and Creatio is non-editable.

- 1. Open the LinkedIn Sales Navigator.
- 2. Search contacts utilizing internal filters.
- 3. Once search is done, click on [Export leads with Wiza].



4. Following the steps in Wiza, start the scraping.

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× Mobile number	× Mobile number	 Mobile number 	
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	View detailed list	View detailed list	

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5. Once data processing is finished, Wiza sends the Webhook to Creatio.

As a result, Creatio will populate the following fields:

- "Full name" ("First name" and "Last name")
- "Full job title"

Also, Creatio populates phone, email, and social network links in the **Communication options** component and addresses (Country, State, City) in the **Address** expanded list.

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T Opportunities	+ Add communication option +									

As a result of importing contacts, each entry will be marked with a tag that displays the status of the email address.

You can learn more about the meaning of statuses in this <u>article</u>.