User guide

for

WordPress plugin
Creatio Connector

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PRODUCT DESCRIPTION

Word Press plugin Creatio is developed to enable easy and smooth connection of WordPress website web forms to Creatio. It allows to integrate all 4 types of landing pages with Creatio:

- Lead registration

- Order registration

- Case registration

- Event participant registration

Use cases for each type of a landing page are described further in this document.

Field mapping between web forms and Creatio objects can be set up easily and without coding through a user-friendly WordPress wizard.

Should you have any questions or suggestions regarding this application please email us support@flexentric.eu – we are happy to help!

INSTALLATION GUIDE

These are general steps to install the plugin and setup connection with Creatio:

1. You will receive a license key by email.

2. Install plugin.

    a. Download form marketplace.

    b. Go to Plugins > Add New > Upload plugin > Choose file

    c. Activate

3. Connect WP to Creatio

    a. Go to Contact > Go to Creatio integration setup

    b. Fill in Creatio url, Creatio login, Creatio password, License key

    c. Attention: Credentials of a user with system administrator access rights must be used in order to connect WordPress plugin to Creatio.

    d. Press Save

4. Create a landing page on the website

    a. Create a web page

    b. Create a Contact form

    c. Add contact form to the web page

5. Create a landing page in Creatio

    a. Go to Landing pages and web forms

    b. Create a new Landing page

    c. Fill in Website URL

    d. Set up parameters and default values

6. Connect the website landing page to the Creatio landing page

    a. Go to Contact > Go to Contact forms

    b. Open Contact form in edit mode

    c. Go to tab Creatio fields mapping

    d. Select landing page type

    e. Select landing page

    f. Select a corresponding field from Creatio for each field from the Contact form g. Press Save

h. Connection completed

If you need to connect an extra landing page to Creatio simply repeat steps 3 to 5.

USE CASES

LANDING PAGE: LEAD REGISTRATION FORM

Case description: On your website you can create a page with a preview of an eBook. To download this eBook website user needs to submit a web form which will generate a lead in Creatio.

Other cases with Lead registration form: Contact us, Subscription for newsletter, Request for products or services, etc.

Suggested fields mapping

Contact Form 7	Data type	Mandatory	Creatio (object Lead)
Full name	Text	Optional	Contact
Business E-mail	Text	Optional	Email
Job Role	Lookup	Optional	Job
Country	Lookup	Optional	Country
Phone	Text	Optional	MobilePhone
Company	Text	Optional	Account
Employees	Lookup	Optional	EmployeesNumber
	Lookup	Mandatory	Default: Customer need = eBook This can be defined in default values of the landing page in Creatio

Contact Form 7 preview
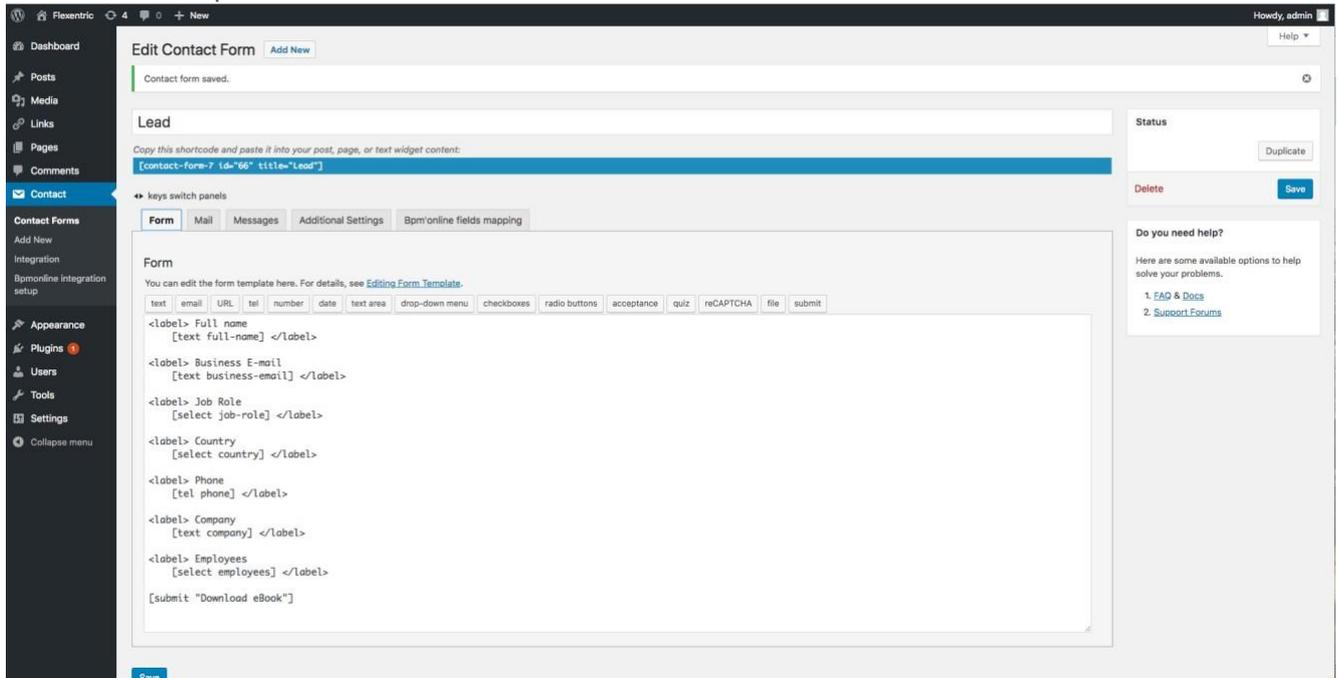
Contact Form 7 fields mapping
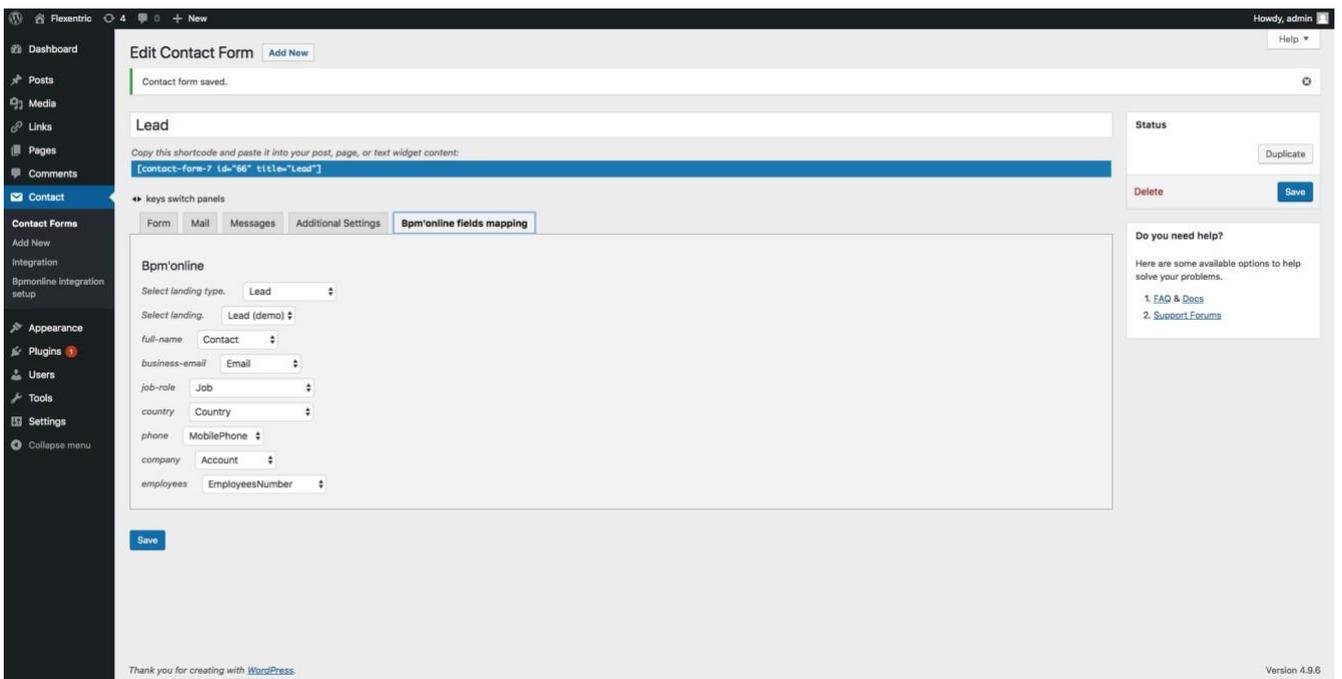
LANDING PAGE:

Case description:

ORDER REGISTRATION FORM

On your website you can create a page with a request for product or service. This page is targeted on existing customers (already existing Contacts in Creatio). Product or service request from new customers can be better handled through a Lead registration form.

Suggested fields mapping

Contact Form 7	Data type	Mandatory	Creatio (object Order)
Recipient's name	Text	Optional	ReceiverName
Phone	Text	Optional	ContatNumber
Delivery address	Text	Optional	DeliveryAddress
Notes	Text	Optional	Comment
	Lookup	Optional	Default: Order channel = Website

Contact Form 7 preview

Contact Form 7 fields mapping

CASE REGISTRATION FORM

LANDING PAGE:

Case description:

On your website you can create a page to register support / customer service tickets. Your customers can choose request category and provide you with request details.

Suggested fields mapping

Contact Form 7	Data type	Mandatory	Creatio (object Case)
Name	Text	Mandatory	Name
Phone	Text	Mandatory	Phone
Email	Text	Mandatory	Email
Category	Lookup	Optional	Category
Subject	Text	Mandatory	Subject
Description	Text	Mandatory	Symptoms
	Lookup	Optional	Default: Source = Site

Without fields Name, Phone, Email and Subject this connection won't work. Values of Name, Phone and Email are used to match a new case to an existing Contact in Creatio.

Contact Form 7 preview

Contact Form 7 fields mapping

LANDING PAGE:

Case description:

EVENT PARTICIPANT REGISTRATION FORM

On your website you can create a page to register support / customer service tickets. Your customers can choose request category and provide you with request details.

Suggested fields mapping

Contact Form 7	Data type	Mandatory	Creatio (object Case)
Contact	Text	Mandatory	Contact
Job title	Text	Mandatory	Contact.JobTitle
Mobile	Text	Optional	Contact.Mobile
Email	Text	Mandatory	Contact.Email
		Mandatory	Default: Event=[]
		Mandatory	Default: Response=Participation confirmed

It's recommended to set event by default in Creatio Landing page and not let the user to select Event from the list of all events, because the list will show both past and future events.

Contact Form 7 preview

Contact Form 7 fields mapping

FAQ

Q: WHICH TYPES OF WORDPRESS WEB FORMS ARE SUPPORTED?

A: Currently Contact Form 7. More web forms will be added in upcoming releases.

Q: WHICH TYPES OF LANDING PAGES CAN BE CONNECTED TO CREATIO?

A: All 4 standard types Event participant registration form, Order registration form, Lead registration form, Case registration form.

Q: WHICH TYPES OF CONTACT FORM FIELDS ARE SUPPORTED?

A: All types of Contact form fields are listed below with mapping to Creatio field types.

Contact form tag	Supported	Creatio type
Text	YES	Text
Email	YES	Text
URL	YES	Text
Tel	YES	Text
Number	YES	Integer, Decimal
Date	YES	Date
Text area	YES	Text
Drop-down menu	YES	Lookup
Acceptance	YES	Boolean
File	NO	
Checkboxes	NO	
Radio buttons	NO	
Quiz	NO	
ReCAPTCHA	NO	
Sumbit	NO	

Q: IS IT POSSIBLE TO MAP CREATIO LOOKUP FIELDS?

A: Yes.

Q: IS IT POSSIBLE TO MAP CREATIO CUSTOM FIELDS?

A: Yes.

Q: Is it possible to map CREATIO date time field?

A: No, only date type is supported by Contact Form 7.

Q: Is it possible to map CREATIO decimal field?

A: Yes, both Integer and Decimal Creatio fields can be mapped to Number field in Contact Form 7.