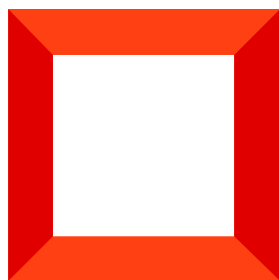
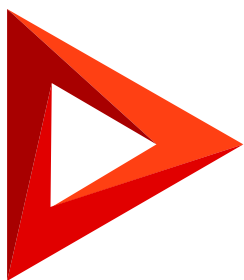


# Base integrations

Version 8.0



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The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

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# Use external files storages

PRODUCTS: ALL CREATIO PRODUCTS

Reduce the size of the database and maintenance by integrating external file storages into Creatio. By default, all files uploaded to Creatio are stored in the database. After connecting to an external file storage, files uploaded to Creatio will be automatically saved to the storage. That includes files uploaded to the [ *Attachments and notes* ] detail via the UI, the mobile app, a business process, files attached to emails, etc. Learn more: [API for file management](#) (developer documentation).

**File storages** that can be integrated:

- S3. A cloud-based object storage REST service. Allows storing data as is with no scalability restrictions. Available for version 7.18.1 and later. Learn more: [Set up S3 file storage integration](#).
- Azure Blob. A cloud-based solution by Microsoft. Available for version 8.0.2 and later. Learn more: [Set up Azure Blob file storage integration](#).

# Set up a secure mailbox connection

PRODUCTS: ALL CREATIO PRODUCTS

Most email providers let third-party apps access the mailbox securely with the help of two-factor authentication and provider-generated passwords. This helps to protect your account and personal data. Email providers rarely block mailbox connection attempts so long as these measures are in place.

As such, we recommend configuring your email for secure third-party app access before connecting the account to Creatio. You need to perform this setup on your email provider's end. The exact steps vary depending on your mailbox.

There should be instructions on setting up third-party app passwords in your email provider's manual. You can find the guidelines for the most popular mailboxes below.

- [AOL](#).
- [Gmail](#).
- [Yahoo](#).
- [Zoho](#).

You will need to enter the **third-party app password** when adding your mailbox to Creatio.

# Add IMAP/SMTP email provider

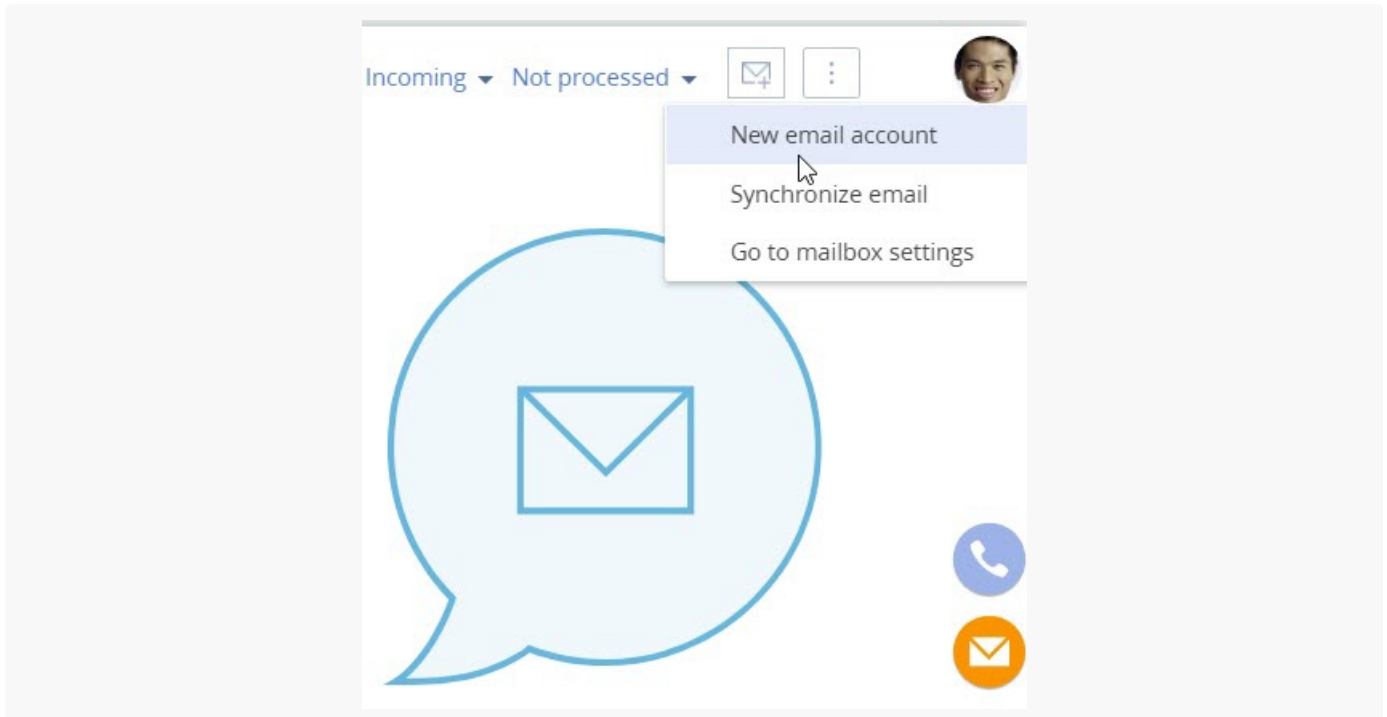
PRODUCTS: ALL CREATIO PRODUCTS


You can add an IMAP/SMTP email service provider using several methods.

## Method 1. Add the IMAP/SMTP provider from the [Email] tab of the communication panel

1. In the communication panel, click  to open the [ *Email* ] tab.
2. Click  and select the [ *New email account* ] action (Fig. 1).

Fig. 1 Adding a new email account



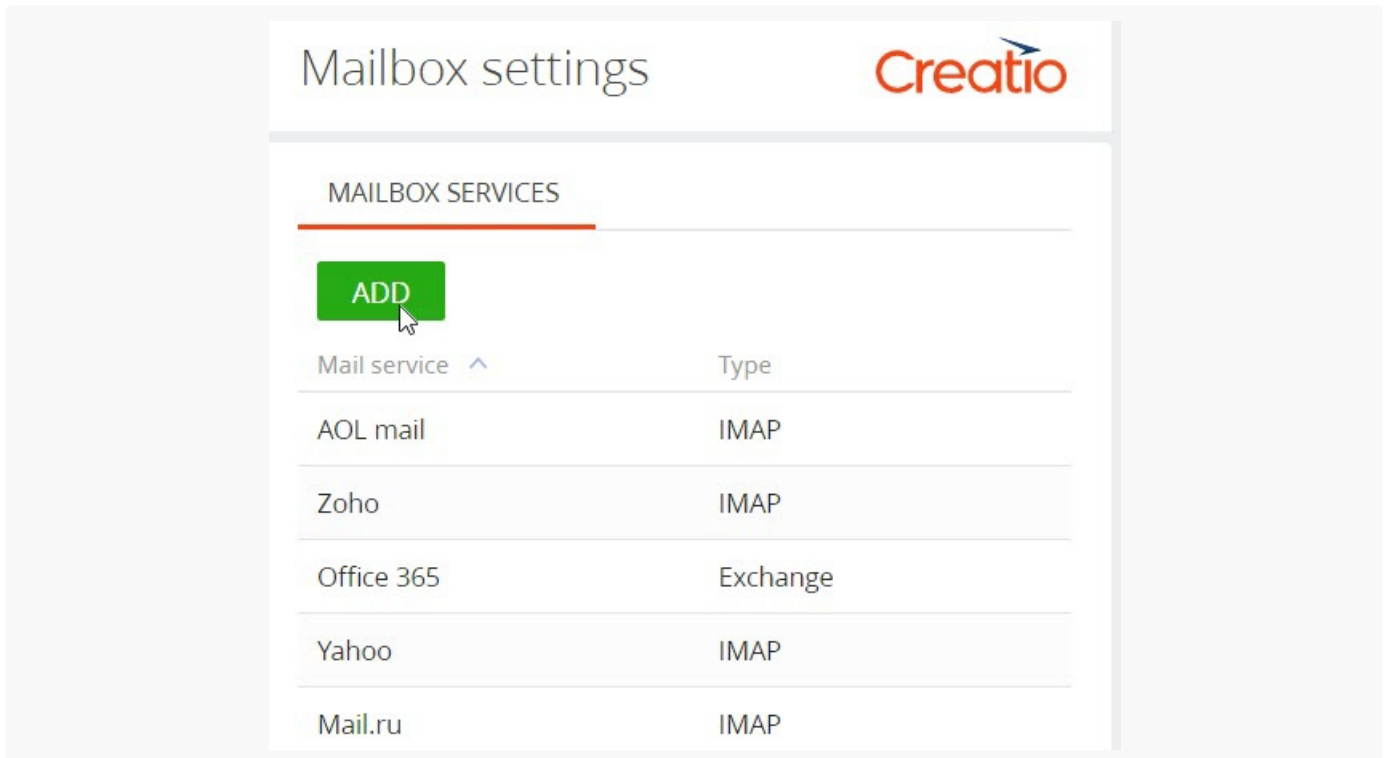
**Note.** You can also add a new email account by selecting [ *Go to mailbox settings actions* ] under  and clicking [ *New* ] on the page that opens.

3. Enter the email address in the displayed [ *New email account* ] window, and click [ *Next* ].
4. Click the **Add New Server** button.

**Note.** Add the domains of a new provider to the [ *Email providers domains* ] lookup to have Creatio automatically identify this email provider in the future. As a result, users will not have to specify the mail provider manually when setting up an email account.

5. On the opened page, click [ *Add* ] (Fig. 2).

Fig. 2 Adding a new email provider



6. On the page that opens, select "IMAP" in the [ *Service type* ] field.
7. Enter two required parameters: the "Inbound mail server (IMAP)" in the "imap@domain.com" format and the "Outgoing mail server (SMTP)" in the smtp@domain.com format (Fig. 3).

Fig. 3 Setting up the IMAP/SMTP email service provider

## Add service

APPLY
CANCEL

---

### Service settings

Service type  
IMAP ▼

---

Inbound mail server (IMAP)  
Email service settings for receiving emails. Specify mail server address, port and security settings

Server address \*  
imap@domain.com

---

Port  
993 ▼

---

Security  
SSL/TLS ▼

---

Outgoing mail server (SMTP)  
Email service settings for sending emails. Specify mail server address, port and security settings

Server address \*  
smtp@domain.com

---

Port  
465 ▼

---

Security  
SSL/TLS ▼

---

[Additional settings](#) ▼

8. The rest of the IMAP/SMTP server settings will be populated automatically. You can change them by selecting the needed option from the drop-down list to configure the mail server port and the security parameters.

**Set the inbound mail server port:**

- a. Select “**143**” to use the port without encryption.
- b. Select “**993**” to use the port for a secure connection.

**Set the security parameters of the inbound mail server:**

- a. Select “**SSL/TLS**” to use the standard data security protocol.
- b. Select “**STARTTLS**” to use the common protocol extension.

- c. Select “**None**” to disable the inbound mail data security.

**Set the outgoing mail server port:**

- a. Select “**587**” to use the port without encryption.
- b. Select “**455**” to use the port for a secure connection.

**Set the security parameters of the outgoing mail server:**

- a. Select “**SSL/TLS**” to use the standard data security protocol.
- b. Select “**None**” to disable the outgoing mail data security.

- 9. Specify additional settings.

**Set up the mailbox login format:**

- a. Select the [ *Use manual entry* ] option if users enter their email address and username.
- b. Select the [ *Use email address* ] option if the full email address is used as a login (for instance, “example@google.com”).
- c. Select the [ *Use mailbox name* ] option if the part of the email address before “@” is used as a username. For example, the “test” will be a login for “test@google.com” email address.

**Set up the authentication method:**

- a. Select “Basic” for the basic authentication using the user name and password with Base64 encryption.
- b. Select “OAuth 2.0” to restrict the service access to protected user resources without the need to pass the login and password. Populate the [ *Application (client) ID* ] and [ *Client secret* ] required fields. [ *Application (client) ID* ] is generated by the authentication server of the mail service. The documentation and API may refer to the application ID as “Product ID.” [ *Client secret* ] - a secret key generated by the authentication server. The documentation and API may refer to the client secret as “Product key.”

- 10. Save the settings by clicking [ *Apply* ].

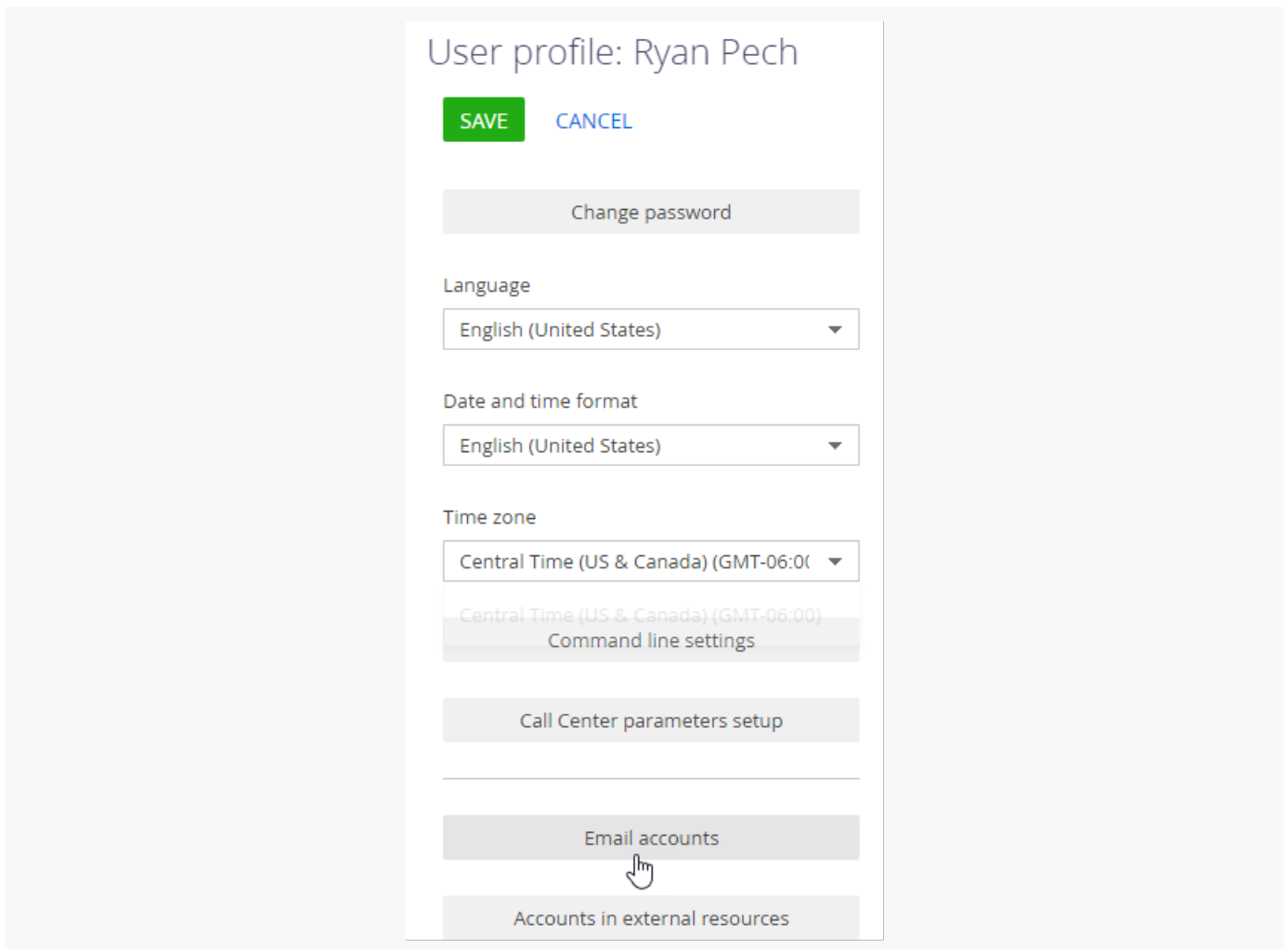
As a result, system users will be able to use the mailboxes of this provider to send and receive email messages.

## Method 2. Add the IMAP/SMTP provider from the user profile

- 1. Open the user profile page by clicking the [ *Profile* ] image button on the main page of the application.
- 2. Click [ *Email accounts* ] (Fig. 1).

Fig. 1 Opening the email accounts





3. Click [ *New* ] in the opened window.
4. To complete the setup, **perform steps 3-10**, described above in **Method 1**.

**Note.** To delete a mail server, delete all its mailboxes (email accounts) first.

## Set up S3 file storage integration

PRODUCTS: ALL CREATIO PRODUCTS

You set up file storage integration in Creatio version 7.18.1 or later.

**S3 file storage.** A cloud based object storage REST service. Allows storing data as is with no scalability restrictions.

**S3 (Simple Storage Service).** A data transfer protocol developed by Amazon. We recommend using Amazon S3 storage. Read more in the [vendor's official documentation](#).

**Note.** You can only connect one S3 storage to Creatio.

To integrate an S3 file storage to a **cloud Creatio instance**, contact the support team. To integrate an S3 file storage to an **on-site Creatio instance**, your Creatio administrator must use this instruction.

In general, the following **steps** are required to set up S3 file storage integration:

1. Settings on the S3 side. [Learn more >>>](#)
2. Settings on the Creatio side. [Learn more >>>](#)

## Settings on the S3 side

1. Create an account with an S3-capable storage service.
2. Generate a “ServiceUrl” parameter to enable Creatio to access the storage.
3. Generate the “AccessKey” and “SecretKey” parameters to enable authorized requests to the storage.
4. Create “ObjectBucketName” and “RecycleBucketName” buckets with unique names.
  - “ObjectBucketName” is a bucket for storing files. The files are stored indefinitely.
  - “RecycleBucketName” is a bucket for storing deleted files. They are kept for database backups. Working with the buckets is based on the soft deletion principle: a file deleted from the “ObjectBucketName” bucket is moved to the “RecycleBucketName” bucket. The storage time for deleted files is controlled by the bucket settings of the service. For example, a file can be stored in the bucket for 90 days, then deleted automatically. In Creatio, the storage time for deleted files is the same as the storage time for database backups.

Learn more in the [vendor’s official documentation](#).

## Settings on the Creatio side

To save new files uploaded to the [ *Attachments and notes* ] detail or email attachments in the S3 storage rather than the database, make the following adjustments on the Creatio side:

1. Set up a connection to the S3 storage. To do this, add an S3 storage connection string to the `connectionString` parameter of the ConnectionStrings.config configuration file:

```
<connectionStrings>
  ...
  <add name="s3Connection" connectionString="ServiceUrl=SOME_SERVICE_URL; AccessKey=SOME_AC
</connectionStrings>
```

where

- `ServiceUrl` is the endpoint for accessing the S3 storage.
- `AccessKey` is the account access key for making an authorized request to the S3 storage.

- `SecretKey` is the account key for making an authorized request to the S3 storage.
  - `ObjectBucketName` is the name of the container for storing files.
  - `RecycleBucketName` is the name of the container for storing deleted files. They are kept for database backups.
2. To ensure that connected files are also moved to “RecycleBucketName” when a section record is deleted, go to the Feature toggle page and enable the “UseBaseEntityFileDeleteListener” functionality. Learn more: [Feature Toggle mechanism](#) (developer documentation).
  3. Set the S3 storage as the active file storage. To do this, open the “Active file content storage” system setting (code `ActiveFileContentStorage`). Select “S3 storage” in the [ *Default value* ] field.

As a result, all files added to Creatio after connecting the S3 storage will be uploaded there. Files previously added to Creatio will remain in the original storage.

# Set up Facebook Messenger integration

PRODUCTS: [ALL CREATIO PRODUCTS](#)

Set up Facebook Messenger integration to let contact center agents process messages sent via your Facebook Page chat in Creatio.

1. Set up chat processing in Creatio. [Read more >>>](#)
2. Add the Facebook Messenger channel. [Read more >>>](#)  
Before you start setting up the Facebook messenger channel, make sure the “Identity server Url” (“IdentityServerUrl” code), “Identity server client id” (“IdentityServerClientId” code), and “Identity server client secret” (“IdentityServerClientSecret” code) system settings are populated. If the values of these system settings are not populated, contact Creatio support.
3. Set up a third-party chatbot for message processing (optional). [Read more >>>](#)

## Step 1. Add Facebook Messenger channel

Add the channel to let Creatio send and receive messages on behalf of your Facebook Page. Perform the setup in the [ *Chat settings* ] section of the System Designer.



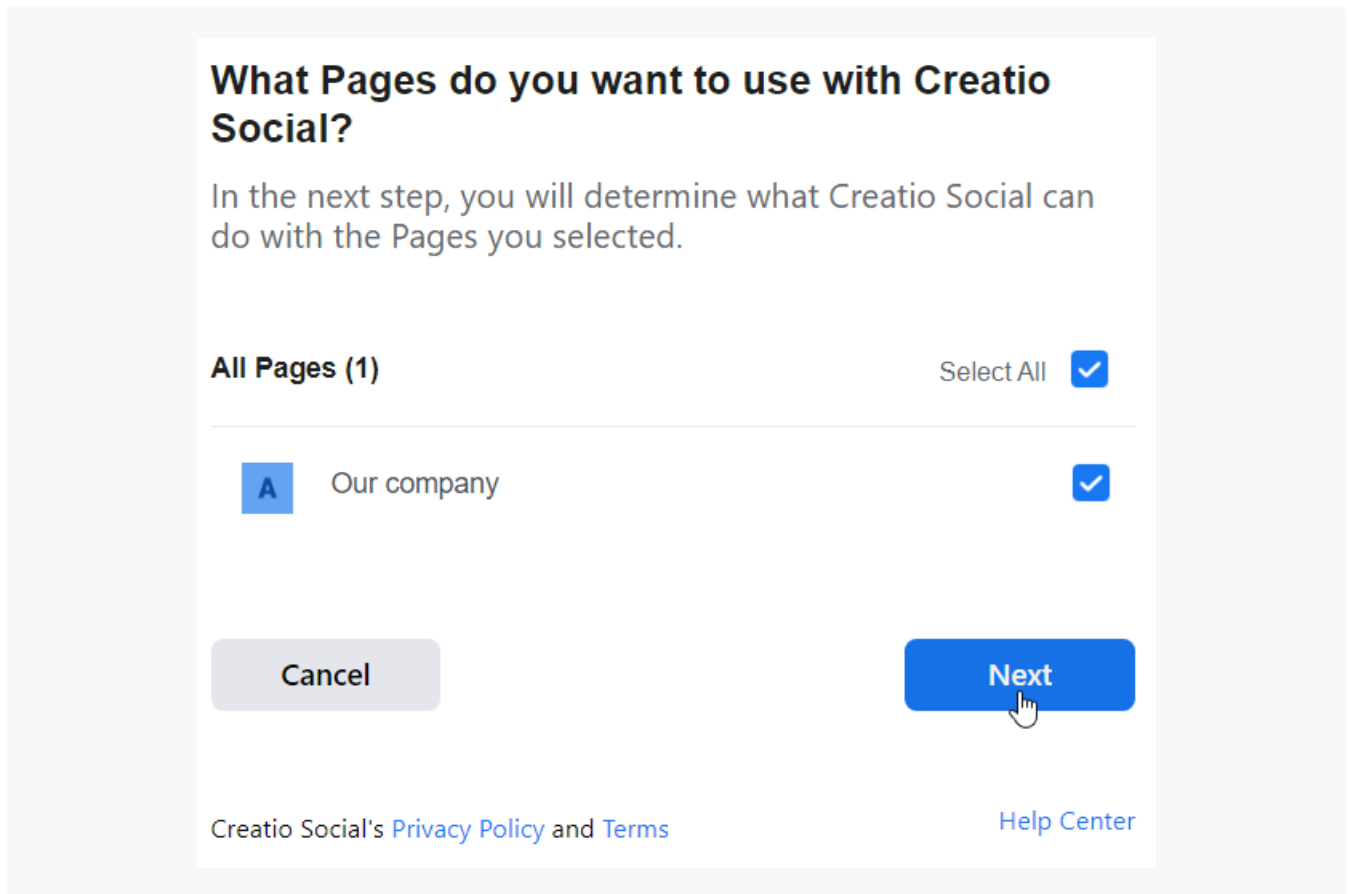
1. Click the  button to open the **System Designer**.
2. Click [ *Chat settings* ].
3. Click the  button in the [ *Channels* ] area. Select “Facebook messenger” in the pop-up menu. This will open the Facebook login window.
4. In the opened Facebook window:
  - a. Log in to Facebook.
  - b. Select the checkboxes for the pages you would like to synchronize with Creatio. Note that you can only set up synchronization for Facebook Pages and not for personal profiles.
  - c. Click [ *Next* ].

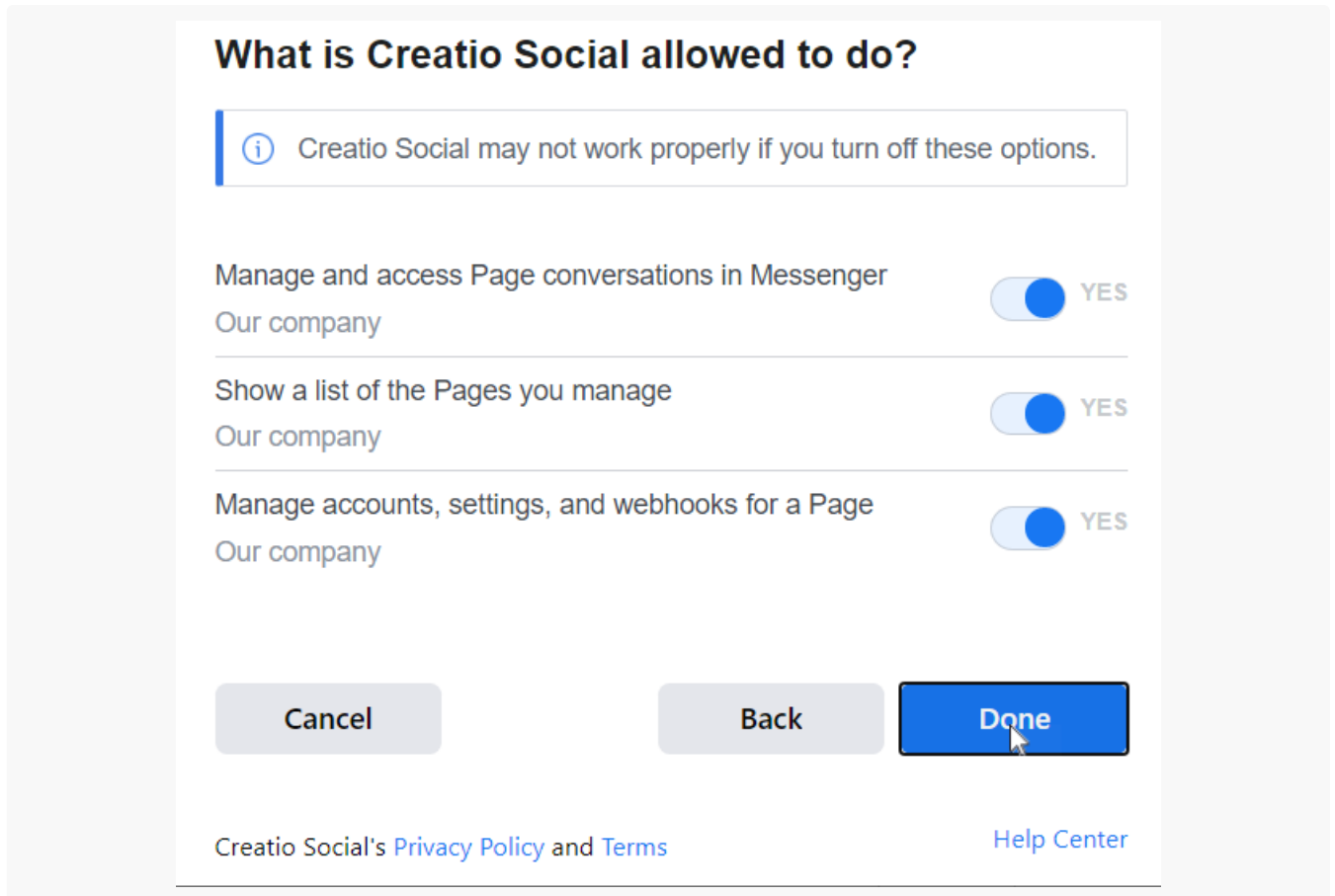
Fig. 1 Selecting a Facebook Page to synchronize with Creatio



- d. Allow Creatio to manage your Facebook Page. This will let Creatio send and receive messages using the Facebook Messenger channel on behalf of your brand. If you restrict Creatio from managing the page, the chat functionality may not work properly.
- e. Click [ *Done* ].

Creatio will add a separate channel for each of the selected pages. The channel name will match the name of the corresponding Facebook page.

Fig. 2 Setting up access to page management



5. To process messages from the new channel in the communication panel, activate the channel and link it to a queue.
  - a. Click the channel name in the [ *Channels* ] detail list.
  - b. In the mini page that opens:
    - Set the switch to “**Active**.”
    - Select the **chat queue** that will process the messages that come via this channel.
    - Select the expected channel message **language**. This will let the agents use quick reply templates in the customer language.
    - Click [ *Apply* ].
6. Repeat step 5 for all other channels if needed.

**Note.** Keep in mind that you can only connect a single Facebook page to a single Creatio application. If you add the channel to several applications, e. g., development, testing, and production environments, only the last integrated instance will receive messages.

## Step 2. Set up third-party chatbot integration (optional)

Creatio allows you to integrate third-party chatbots that will process common user requests, reducing the load on the agents. This option is only available for Facebook Messenger chats. The chatbot setup and Facebook

integration procedure depend on the bot platform. These instructions are usually available in the bot platform's vendor documentation.

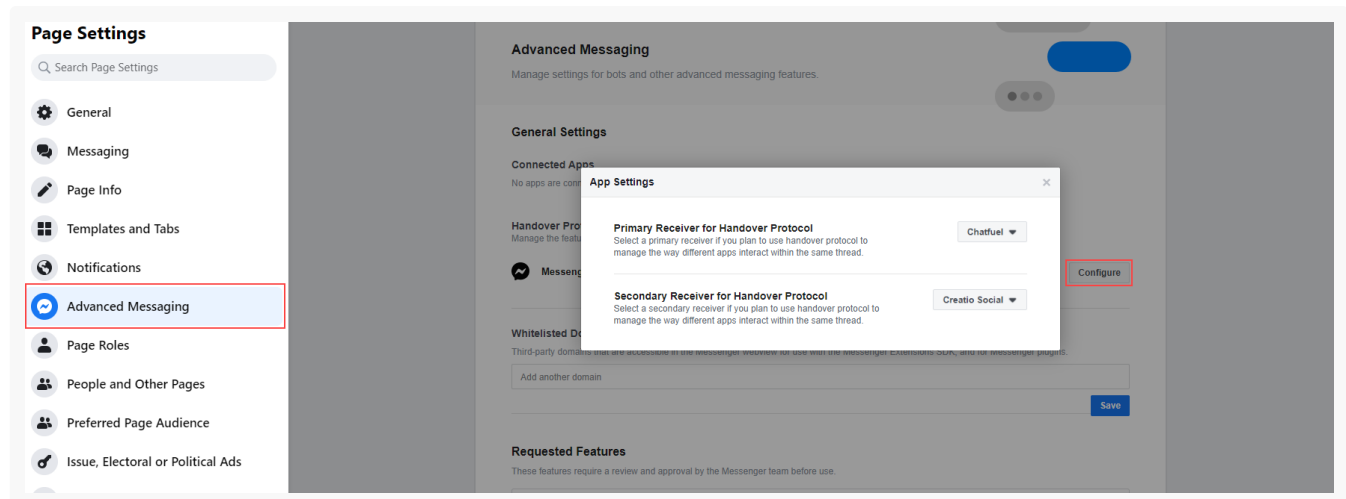
This functionality requires:

- A Facebook Page.
- A working Creatio [Facebook Messenger channel](#).
- A third-party bot platform that supports the [Handover Protocol](#) and is integrated with your Facebook Page.

To integrate Creatio with the chatbot:

1. Go to the “Settings” section of your Facebook page → “Advanced Messaging.”
2. Configure the “Messenger receiver” parameters in the “Connected Apps” block:
  - Primary Receiver for Handover Protocol – your bot platform
  - Secondary Receiver for Handover Protocol – Creatio Social application

Fig. 3 Configuring the Messenger receiver



As a result, the chatbot will process messages sent to your Facebook Page. Creatio will display them in the [ Chats ] section. The [ Agent ] field will be left empty for bot-processed chats.

## Set up a personal mailbox

PRODUCTS: [ALL CREATIO PRODUCTS](#)

Each Creatio user can set up an integration with one or more mailboxes and use them to send and receive emails. Creatio uses the emails to enrich contact data and links the emails to existing objects: accounts, contacts, etc.

### Set up an email account of a preconfigured provider

You need an email provider integration to add an email account. By default, Creatio is integrated with AOL, Gmail, Yahoo and other email providers. To add an account to Creatio, configure secure access for external apps. Perform the setup in your mailbox. The settings depend on the provider. Learn more in a separate article: [Set up](#)

[a secure mailbox connection](#).

If you use a different provider, set up the synchronization by the [IMAP/SMTP](#) or [Exchange](#) protocol. The setup is performed by a system administrator.

To set up an email account of a preconfigured provider:


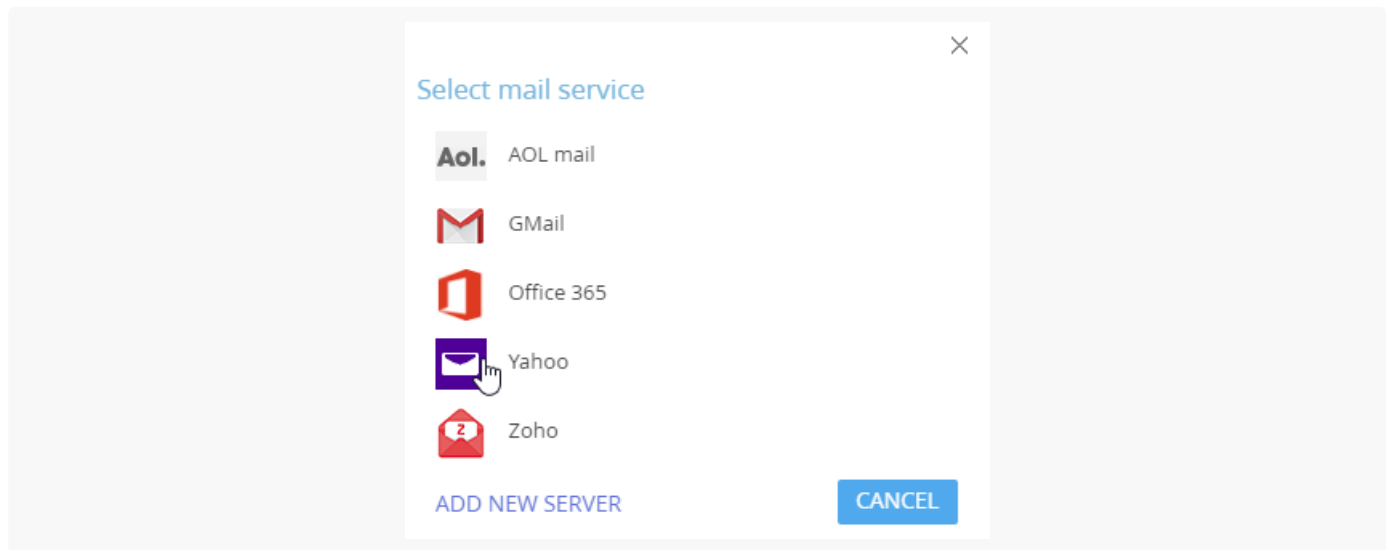
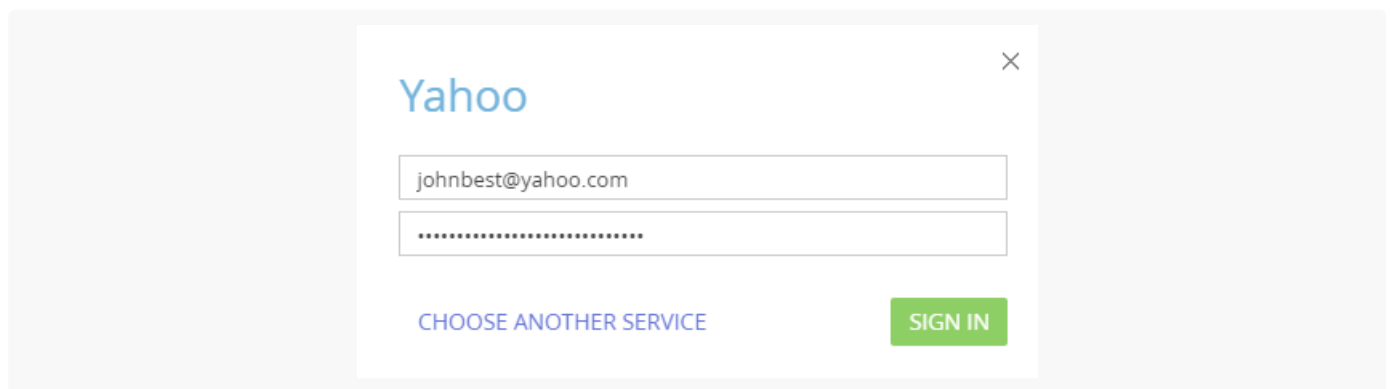
1. Open the [ *Email* ] tab on the communication panel →  → [ *New email account* ]. This opens the account authentication window.
2. Enter the email address and click [ *Next* ]. Creatio identifies the email provider according to the domain name.
3. If Creatio cannot identify the provider automatically, a window opens. Specify the provider manually in the window (Fig. 1). As a result, the connection parameters of the new email provider will appear in the [ *Email providers domains* ] lookup. Creatio will recognize the provider by the domain name when you set up new email accounts.

Fig. 1 Select an email provider for synchronization



4. Enter the email address and click [ *Next* ]. Creatio will request the password to log in to your account.
5. Enter the password for external app access generated by the provider and click [ *Sign in* ] (Fig. 2).

Fig. 2 Sign in to an email account




As a result, Creatio will add an email account with default parameters. You will receive a notification from which you can proceed to upload emails to Creatio or perform [additional account setup](#), for example, add a signature or change the email upload period.

## Set up an email account on a corporate domain

If you use a corporate email domain, set up integration with the corporate email provider by the [IMAP/SMTP](#) or [Exchange](#) protocol and match domain names to the corresponding email providers. The setup is performed by a system administrator.

**Note.** Gmail supports authentication without providing the login and password (OAuth connection). Before you set this up, register Creatio in Google Workspace. Learn more in a separate article: [Register Creatio application in Google Workspace](#).

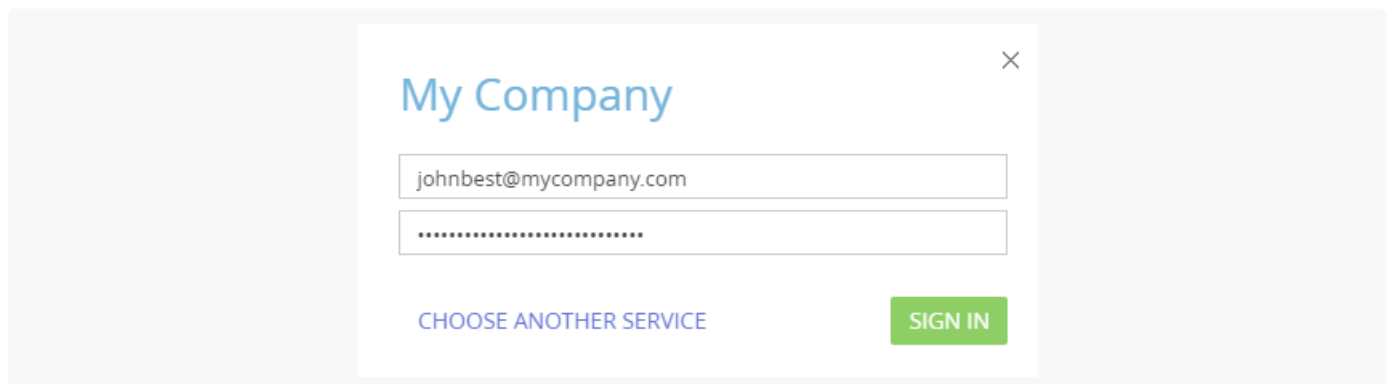
To set up an email account on a corporate domain:

1. Open the [ *Email* ] tab on the communication panel →  → [ *New email account* ]. This opens the account authentication window. This method of adding the account does not depend on the availability of configured accounts.
2. Enter the email address and click [ *Next* ]. Creatio identifies the email provider according to the domain name.
3. If Creatio cannot identify the provider automatically, a window opens. Specify the provider manually in the window. As a result, the connection parameters of the new email provider will appear in the [ *Email providers domains* ] lookup. Creatio will recognize the provider by the domain name when you set up new email accounts.

**Note.** A popular email provider, such as Yahoo or Gmail, can service a mailbox with a corporate domain address. If you do not know which email provider to choose, verify this with your system administrator. To log in to Gmail mailbox without providing the login and password (OAuth connection), register Creatio in Google Workspace first. Learn more in a separate article: [Register Creatio application in Google Workspace](#).

4. Enter the mailbox password in the field that appears and click [ *Sign in* ] (Fig. 3).

Fig. 3 Sign in to an email account of a corporate provider



The screenshot shows a sign-in window titled "My Company" with a close button (X) in the top right corner. Below the title, there are two input fields: the first contains the email address "johnbest@mycompany.com" and the second contains a masked password represented by a series of dots. At the bottom of the window, there are two buttons: "CHOOSE ANOTHER SERVICE" in blue text and "SIGN IN" in white text on a green background.

As a result, Creatio will add an email account with default parameters. You will receive a notification from which you can proceed to upload emails to Creatio or perform [additional account setup](#), for example, add a signature or change the email upload period.

## Configure a shared mailbox



PRODUCTS: **ALL CREATIO PRODUCTS**

Shared email account enables managing shared access to the mailbox: set the access permissions to read emails for different groups of users, enable processing of incoming emails and sending emails from one address for different users or groups of users.

Shared mailboxes are commonly used:

- For case registration, sending notifications and emailing between the customers and the service team in the process of case resolution or for processing requests about company products.
- For processing information requests about company products. For example, you can create a shared sales department mailbox and grant access to the advertising department employees for sending newsletters and special offers.

**Note.** All incoming and outgoing emails from the shared mailbox, will only be visible in the communication panel, timeline and history to the user who registered this mailbox in Creatio and to the users which get the access permission to work with emails.

**Attention.** To set up a shared mailbox, you need permission to perform the [ *Access to shared account setup* ] and [ *Shared mailbox synchronization setup* ] system operations. [Managing access to system operations](#) is covered in a separate article.

Shared mailbox setup is similar to personal mailbox setup, but it also requires the following actions:

The following options can be used for managing access to the mailbox:

1. Select the [ *Allow shared access* ] option on the email settings page.
2. Click the **+** button to add employees who will use the shared mailbox. Click the **Q** button in the displayed field and specify system user or role to grant access to a group of users. Click the [ *Save* ] button. If you want to grant access to the mailbox for a number of users or groups, repeat the previous step for each user or group.
3. Configure access permissions for the shared mailbox (access emails, sending emails or setting up mailbox) for the added users. For this, select the checkbox in the corresponding column ([Fig. 1](#)).

Fig. 1 Example of configuring permissions to a shared mailbox

User / Role	Access emails	Send emails	Setup mailbox
Client service department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>


- a. "Access email" – enables to display emails received on this mailbox in the system sections, for example, on the [ *Timeline* ] tab. At the same time, the emails from the shared mailbox will not be displayed in the communication panel of the user with granted access to emails. This option is used if several employees process emails from one mailbox. For example, for cases registered via email.
- b. "Send emails" – enables to select this mailbox in the [ *From* ] field when sending emails, setting up business processes and display incoming emails at the communication panel.
- c. "Setup mailbox" – enables modification of the mailbox settings by several administrators.

#### 4. Save the changes

# Synchronize calendar with Microsoft Exchange and Microsoft 365

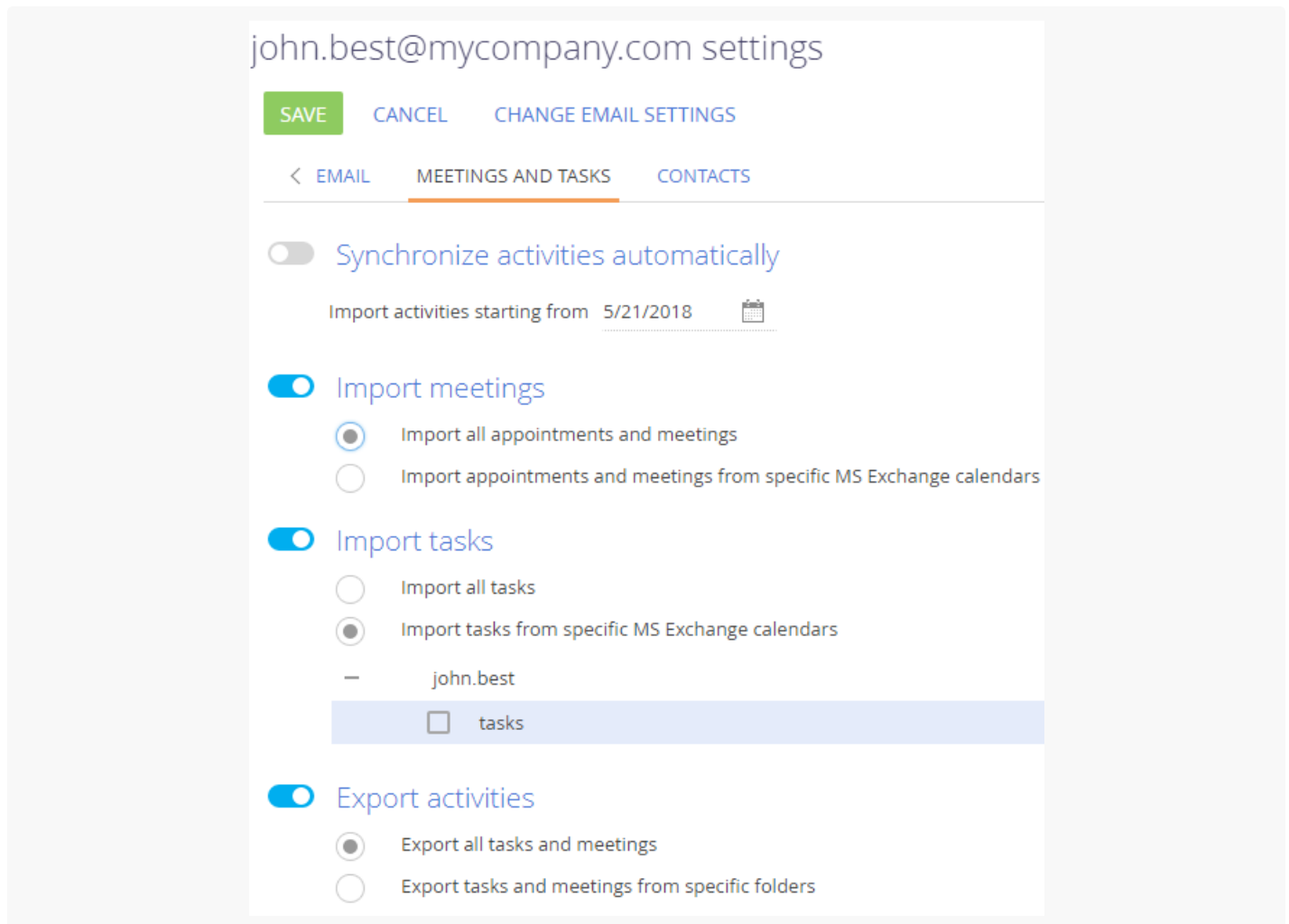
PRODUCTS: [ALL CREATIO PRODUCTS](#)

Use the mailbox synchronization setup page to set up the synchronization of Creatio activities with Microsoft Exchange or Microsoft 365 tasks and meetings (Fig. 1). You can open the page in several ways:

- Click  → [ *Edit email accounts* ] in the communication panel.
- Select [ *Actions* ] → [ *Synchronize activities* ] → [ *Set up...* ] in the [ *Activities* ] section.

The command contains the name of the account, for example, [ *Set up john.best@mycompany.com* ].

Fig. 1 Set up the synchronization of Creatio activities with Microsoft Exchange calendar



Creatio uses only the main Exchange calendar (default calendar) for synchronization. The records of additional calendars are not imported. Learn more about setting up the default calendar in [Microsoft documentation](#).

## Set up the import of activities into Creatio

To set up the import of Microsoft Exchange or Microsoft 365 **meetings** into Creatio:

1. Go to the [ *Meetings and tasks* ] tab and enable the [ *Import meetings* ] toggle.
2. Select [ *Import all appointments and meetings* ] to import all records from Microsoft Exchange or Microsoft 365 calendars.

If you only want to import records from the selected calendars, select [ *Import appointments and meetings from specific MS Exchange calendars* ]. Expand the index of calendars and select the calendars to import.

3. Select the [ *Import tasks* ] checkbox and if necessary, select folders whose tasks to import.
4. Click [ *Save* ] on the mailbox synchronization setup page.

As a result, Creatio will add the calendar tasks. In this case, only the tasks owned by the current Creatio user will be imported. Set up the import of **tasks** similar to the import of meetings.

## Set up the export of activities from Creatio

To set up the export of Creatio activities to Microsoft Exchange or Microsoft 365:

1. Go to the [ *Meetings and tasks* ] tab and enable the [ *Export activities* ] toggle.
2. Select [ *Export all tasks and meetings* ] to export all activities to which you have access.

If you only want to export activities from specific folders, select [ *Export tasks and meetings from specific folders* ]. The index of folders corresponds to the folders configured in the [ *Activities* ] section.

3. Click [ *Save* ] on the mailbox synchronization setup page.

As a result, when exporting tasks that have the [ *Display in calendar* ] checkbox selected, Microsoft Exchange or Microsoft 365 will create activities of the “Appointment” type. When exporting tasks that have the [ *Display in calendar* ] checkbox cleared, Microsoft Exchange or Microsoft 365 will create activities of the “Task” type.

## Synchronize activities with Microsoft Exchange and Microsoft 365

Creatio can synchronize activities with the Exchange server automatically. To enable automatic synchronization, open the mailbox synchronization setup page, enable the [ *Synchronize activities automatically* ] toggle, and select the date in the [ *Import activities starting from* ] field. To perform the synchronization immediately, open the [ *Activities* ] section, click [ *Actions* ] → [ *Synchronize activities* ] → [ *Synchronize now* ].

## Delete your Google account from Creatio

PRODUCTS: [ALL CREATIO PRODUCTS](#)

To delete a Google account, do the following:

1. Open the user profile page. Click the [ *Profile* ] button on the home page.
2. Click the [ *Accounts in external resources* ] button.
3. Select the Google account and click [ *Actions* ] → [ *Delete* ]. Click [ *Yes* ].

## Set up WhatsApp integration

PRODUCTS: [ALL CREATIO PRODUCTS](#)

WhatsApp is a Facebook product. Due to this, you need the following to integrate this messenger:

- A **Facebook Business Manager** account. If you have not signed up yet, follow the [Facebook instructions](#).
- Integration with a Facebook partner platform that provides access to WhatsApp Business API. You can use **Twilio**.

You can sign up for a trial account with limited functionality to **get acquainted** with the WhatsApp integration features. **Verify your accounts** to take full advantage of WhatsApp integration. This will help you secure your and your customers' data. In general, the WhatsApp integration setup consists of the following steps:

1. Set up a Twilio free trial account to get acquainted with the integration (optional). [Read more >>>](#)
2. Set up a Twilio business account. [Read more >>>](#)

3. Set up a WhatsApp chat channel in Creatio. [Read more >>>](#)

File transfer in WhatsApp channel is **limited** to:

- **Receiving files.** At the moment, Creatio only works with incoming files, sending files is not available.
- **File size** up to 16 Mb.
- **File formats:**
  - Images: \*.jpg, \*.jpeg, \*.png.
  - Audio files: \*.mp3, \*.ogg, \*.amr.
  - Documents: \*.pdf.
  - Videos: \*.mp4.

Learn more about supported file formats in [Twilio documentation](#).

**Note.** Twilio is partnered with telecom service providers in a limited number of countries. View the country list in [Twilio documentation](#). Besides the specified providers, Twilio has no restrictions on US phone numbers. If your number is not eligible, follow [Twilio instructions](#).

## Step 1. Set up a trial account (optional)

You can set up a Twilio free trial account without verification and subscription to paid platform services. This will let you test Creatio WhatsApp integration, including messaging and file transfer. To set up the test integration:

1. Set up a Twilio free trial account. [Read more >>>](#)
2. Set up a WhatsApp chat channel in Creatio [Read more >>>](#)

### Set up a Twilio free trial account

1. Sign up on <https://www.twilio.com/try-twilio>. You will be able to set up a test integration after the signup. Twilio will grant you limited virtual funds to help you review the functionality.

**Note.** Should you decide to convert the account to a full-fledged business account, the trial features and virtual funds will become unavailable. We recommend using separate accounts for working and testing purposes.

2. Specify the endpoint URL for transferring chats to Creatio. To do this, navigate to the sandbox settings in Twilio:
 


[Twilio Console](#) → Programmable Messaging → Settings → WhatsApp Sandbox Settings → Sandbox Configuration and enter the “<https://sm-receiver.creatio.com/api/webhook/LeadGen/whatsapp>” value in the [ *WHEN A MESSAGE COMES IN* ] field.
3. Set up the Twilio sandbox: [Twilio Console](#) → Programmable Messaging → Try it out → Send a WhatsApp message.
4. Twilio will generate a code. Send the code from your phone number to your trial account number using

WhatsApp. Twilio will notify you upon success. As a result, Twilio will add your number to Sandbox Participants.

5. If you would like to use several test numbers, repeat step 3 for each of them. To review the test numbers in the Sandbox Participants list, go to Twilio Console → Programmable Messaging → Settings → WhatsApp Sandbox Settings → Sandbox Participants. After that your trial account number will be able to receive messages from the numbers you added in the previous step.

## Set up a test WhatsApp channel in Creatio

Before you start setting up the WhatsApp channel, make sure the “Identity server Url” (“IdentityServerUrl” code), “Identity server client id” (“IdentityServerClientId” code), and “Identity server client secret” (“IdentityServerClientSecret” code) system settings are populated. If the values of these system settings are not populated, contact Creatio support.

1. Click the  button to open the **System Designer**.
2. Click [ *Chat settings* ].
3. Click + button in the [ *Channels* ] area. Select “WhatsApp” in the pop-up menu. This will open a mini page with the channel parameters.
4. Fill out the **channel parameters**:
  - a. [ *Phone number* ] – your Twilio free trial account phone number.
  - b. [ *Verification phone number* ] – a phone number included in the Sandbox Participants list in Twilio.
  - c. [ *Application Id* ] – the Twilio free trial account SID specified in the [ *ACCOUNT SID* ] field of the Twilio Console.
  - d. [ *Token* ] – the token Twilio generates for the trial account. Specified in the [ *AUTH TOKEN* ] field of the Twilio Console.
5. Click [ *Connect* ].
6. Activate the chat channel. In the mini page that opens:
  - a. Set the switch to [ *Active* ].
  - b. Select the **chat queue** that will process the messages that come via this channel.
  - c. Click [ *Apply* ].

As a result, Creatio will connect a test WhatsApp channel. You will be able to receive and process test messages and files.

## Step 2. Set up a business account

Sign up for Twilio and complete the verification to take advantage of all Twilio business features. Learn more in [Twilio documentation](#).

The general setup procedure is as follows:

1. Sign up for [Facebook Business Manager](#).
  - a. If your company **already has an account**, proceed to step 2.

- b. If your company **does not have an account yet**, follow the instructions in [Facebook documentation](#).
2. Sign up for [Twilio](#).
3. Specify the endpoint URL for transferring chats to Creatio. To do this, navigate to the sandbox settings in Twilio:  
[Twilio Console](#) → Programmable Messaging → Settings → WhatsApp Sandbox Settings → Sandbox Configuration and enter the “https://sm-receiver.creatio.com/api/webhook/LeadGen/whatsapp” value in the [ *WHEN A MESSAGE COMES IN* ] field.
4. Verify your Twilio number with WhatsApp.
  - a. [Request WhatsApp](#) to enable your Twilio number. Select “**No**” in the [ *Are you working with an ISV, SI, or third party* ] field. After you send the request, Twilio will send an initial confirmation email describing your further steps to the email address specified in the form.
  - b. Add the **phone number**:  
Go to Twilio Console → Programmable Messaging → Senders → WhatsApp Senders and click the [ *New WhatsApp Sender* ] button.  
You can use [your own phone number](#) or buy a [Twilio number](#).


**Note.** Follow WhatsApp [display name guidelines](#) when filling out your profile.

- c. Allow Twilio to **send messages** on your behalf. To do so, go to Facebook Business Manager and approve Twilio's request to send messages on your company's behalf. To approve the request:
  - Go to business.facebook.com → Settings → Business Settings → Requests
  - Follow the link in the initial phone number confirmation email
- f. **Verify the company** with Facebook Business Manager. If you have already verified your company, proceed to the next step. To verify your company:  
Go to Facebook Business Manager → Settings → Business Settings → Security Center and click the [ *Start verification* ] or [ *Continue* ] button in the [ *Business Verification* ] section.  
Learn more about verifying the business in [Facebook documentation](#).
- g. Follow the link in the email from Twilio to confirm the registration.

As a result, you will be able to communicate with customers using WhatsApp via the registered number within 24 hours after the verification.

## Step 3. Add a WhatsApp channel to Creatio

Before you start setting up the WhatsApp channel, make sure the “Identity server Url” (“IdentityServerUrl” code), “Identity server client id” (“IdentityServerClientId” code), and “Identity server client secret” (“IdentityServerClientSecret” code) system settings are populated. If the values of these system settings are not populated, contact Creatio support.

1. Click the  button to open the **System Designer**.
2. Click [ *Chat settings* ].

3. Click the **+** button in the [ *Channels* ] area. Select “WhatsApp” in the pop-up menu. This will open a mini page with channel parameters.
4. Fill out the **channel parameters**:
  - a. [ *Phone number* ] - the phone number connected to and verified with Twilio.
  - b. [ *Verification phone number* ] - the phone number to which Creatio will send the channel verification message.
  - c. [ *Application Id* ] - the Twilio account SID specified in the [ *ACCOUNT SID* ] field of the Twilio Console.
  - d. [ *Token* ] - the token Twilio generated for your account. Specified in the [ *AUTH TOKEN* ] field of the Twilio Console.
5. Click [ *Connect* ].

Fig. 1 Setting up a WhatsApp channel

The screenshot shows a form for setting up a WhatsApp channel. It has four input fields, each with a red asterisk indicating it is required. The first field is 'Phone number \*' with a '+' sign and a greyed-out input area. The second is 'Verification phone number \*' with a '+' sign and a greyed-out input area. The third is 'Application Id \*' with the text 'AC99' and 'b4eff' visible. The fourth is 'Token \*' with the text 'bf58' and '25f6' visible. At the bottom of the form, there are two buttons: a blue 'CONNECT' button with a mouse cursor pointing to it, and a grey 'CANCEL' button.

6. If the channel is verified successfully, Creatio will open a channel edit mini-page. To process messages from the new channel in the communication panel, activate the channel and link it to a queue. To do so:
  - a. Set the switch to [ *Active* ].
  - b. Select the **chat queue** that will process the messages that come via this channel.
  - c. Select the expected channel message **language**. This will let the agents use quick reply templates in the client language.
  - d. Click [ *Apply* ].

This will connect a WhatsApp channel to Creatio. Contact center agents will be able to process messages received via this channel in the communication panel and view the chat history in the [ *Chats* ] section.

**Note.** Keep in mind that you can only connect a single WhatsApp number to a single Creatio application. If you add the number to several applications, e. g., development, testing, and production environments, only the last integrated instance will receive messages.



# Email account individual settings

PRODUCTS: [ALL CREATIO PRODUCTS](#)

Email accounts are added with default parameters. For each added email account, you can configure:

- email downloading parameters;
- email sending parameters;
- email signatures.

**Note.** If you have configured the synchronization with the MX Exchange mailbox, the [ *Meetings and tasks* ] and [ *Contacts* ] tabs will be displayed at the email account settings page. Here you can configure parameters of synchronization of MS Exchange calendar and contacts. [Read more >>>](#)


You can go to the mailbox settings directly from the mailbox registration notification or by selecting the account in the [ *Edit email accounts* ] menu of the  button.

Fig. 1 Edit page of the email account settings

john.best.business@gmail.com settings What can I do for you? >

CLOSE [CHANGE EMAIL SETTINGS](#)

< EMAIL >

---

**Download emails to Creatio**

Select emails to download. Downloaded emails would be saved to Creatio and linked to customer records

Sync existing emails for the following period 1 week ▼

Automatically download new emails

Download all emails from mailbox

Download emails from customized folders

**Send emails from Creatio**

Setup singnature and default mailbox for sending emails from Creatio

Message language ▼

Set custom display name \_\_\_\_\_

Use "john.best.business@gmail.com" as default mailbox when sending emails

Add signatures to outbound emails

**Allow shared access**

Allow other users to send emails using this mailbox or access emails downloaded from this mailbox

Which access rights to add? +

User / Role	Access emails	Send emails	Setup mailbox
No data			

## Receive emails in Creatio

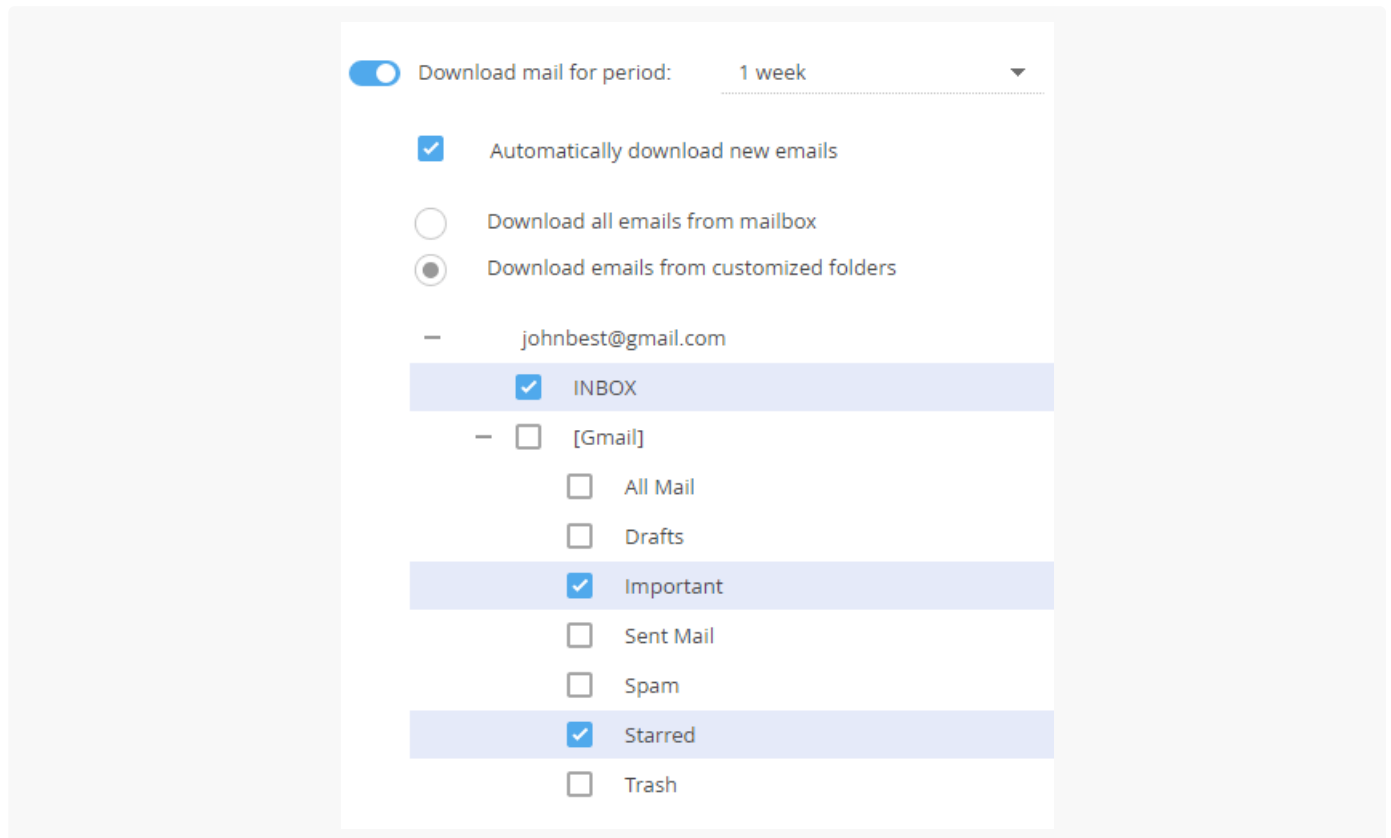
1. To receive emails from the mailbox, toggle on the [ *Download mail for period* ] switch and specify the time interval (for example, day, week, month) for which emails will be downloaded to the system at the first synchronization.

You can change how often Creatio will synchronize the mailbox in the “Mailbox synchronization interval” (“MailboxSyncInterval” code) [system setting](#).

2. Select the [ *Automatically download new emails* ] checkbox to download incoming emails automatically.
3. Select the [ *Download all emails from mailbox* ] option to download all messages from the mailbox or the [ *Download emails from customized folders* ] option to download messages from specific folders only.

- To download emails from specific folders only, select the [ *Download emails from customized folders option* ], click the [ + ] button to display the folders of the specified account and select folders from which you need to receive emails (Fig. 2).

Fig. 2 Specifying synchronization folders



- Save the changes.

**Note.** If you only select a parent folder for downloading emails, the messages from the nested folders will not be downloaded to Creatio. Select the nested folders to download emails from them.

## Send emails from Creatio

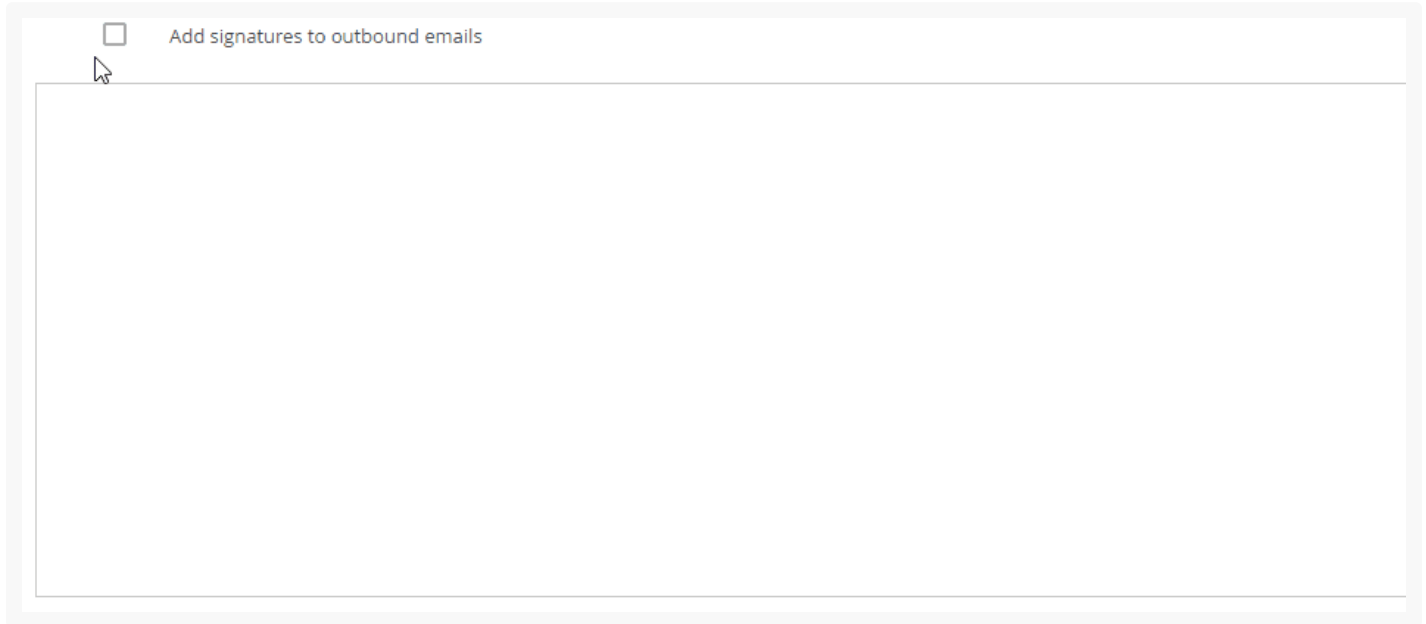
To reply to emails directly from Creatio, set up email sending parameters. To do this:

- Toggle on the [ *Send emails using this mailbox* ] switch to use the mailbox for sending the emails. If the switch is disabled, the mailbox will not be available for selection on the email edit page, as well as in the corresponding business process and case elements.
- Select the [ *Set "email address" as default sender address* ] checkbox to use the mailbox by default. The mailbox address will be specified by default in the [ *From* ] field for new emails.
- Save the changes.

## Configure an email signature

To add a signature to outgoing emails, select the [ *Add signatures to outbound emails* ] checkbox and add the signature text in the input area below (Fig. 3). Save the changes.

Fig. 3 Adding signatures to outgoing emails

The image shows a user interface element for adding signatures. At the top left, there is a small square checkbox followed by the text 'Add signatures to outbound emails'. Below this, there is a large, empty rectangular text input area with a thin border. A mouse cursor is visible at the top left corner of the text area.

**Note.** You can copy a signature from your mail client and paste it to the text area. In some browsers, only one image can be copied to the signature template at a time from the clipboard. If your signature contains several images, the remaining images must be added one by one.

# Set up automatic lead registration from LinkedIn

PRODUCTS: **MARKETING**

This feature is available in beta version in Creatio version 7.18.5. We appreciate your feedback.

Connect the forms from your LinkedIn lead generation campaigns to Creatio to automate lead import.

Before you start the integration, make sure you meet the following **prerequisites** on LinkedIn's end:

- You have an ad account with lead forms. Set up the ad account in the [LinkedIn Campaign Manager](#). Learn more about how to set up the ad account and lead generation forms in the official LinkedIn documentation: [Create an Ad Account](#), [Create Lead Gen Forms](#).
- Your user account has access to the ad account.
- Your user account has a “Super admin” or “Lead gen forms manager” role on the company page connected to the ad account.

Also, make sure that the values of the following Creatio [system settings](#) are populated:

- “Identity server Url” (“IdentityServerUrl” code)
- “Identity server client id” (“IdentityServerClientId” code)
- “Identity server client secret” (“IdentityServerClientSecret” code)

If the values of these settings are empty, contact Creatio support.

**Attention.** If you use Safari, make sure to allow pop-up windows for your Creatio instance.

## Set up a LinkedIn ad account integration

You can integrate as many LinkedIn user accounts as necessary. Each LinkedIn user account can be connected to any number of ad accounts. Add a separate Creatio integration record per ad account.

After you add the integration record, map the LinkedIn form fields to Creatio columns to ensure LinkedIn passes the data correctly. You can also use the mapping feature to specify constant values for Creatio columns with “String,” “Decimal,” “Boolean,” “Date,” “Date/Time,” and “Lookup” data types. This will help you filter the imported records easier. For example, specify “CRM Days” in the [ *Event* ] lookup field.

There are several mapping options:

- **Default mapping** applies to all forms in your ad account. This option supports fields from the “Profile information” group in the “Lead details & custom questions” section of your LinkedIn form. The data type of these fields can be “String” or “Date.”
- **Custom mapping** applies to a specific form. It supports fields from the entire “Lead details & custom questions” section, as well as “Custom checkboxes” and “Hidden fields” sections of your LinkedIn form. The data type of these fields can be “String,” “Date,” or “Boolean.”

If you specify custom mappings, Creatio will ignore the default mappings for the corresponding form.

Learn more about the LinkedIn form fields in the official LinkedIn documentation: [Create Lead Gen Forms](#), [Lead Gen Form Fields](#).

By default, both mapping options map the [ *Notes* ] column to “**not\_mapped\_fields**” macro that passes the data of the entire form submission as a string. This macro is required. If necessary, map the macro to a different string column, preferably with unlimited text length.


After you create the integration record and map the form fields, Creatio will register all newly-captured leads with unique LinkedIn lead IDs from the ad account automatically.

In general, the ad account integration procedure is as follows:

1. Create a new ad account integration. [Read more >>>](#)
2. Set up default mapping. [Read more >>>](#)
3. Set up custom mapping (optional). [Read more >>>](#)

### Step 1. Create a new LinkedIn ad account integration

To create a new integration record:

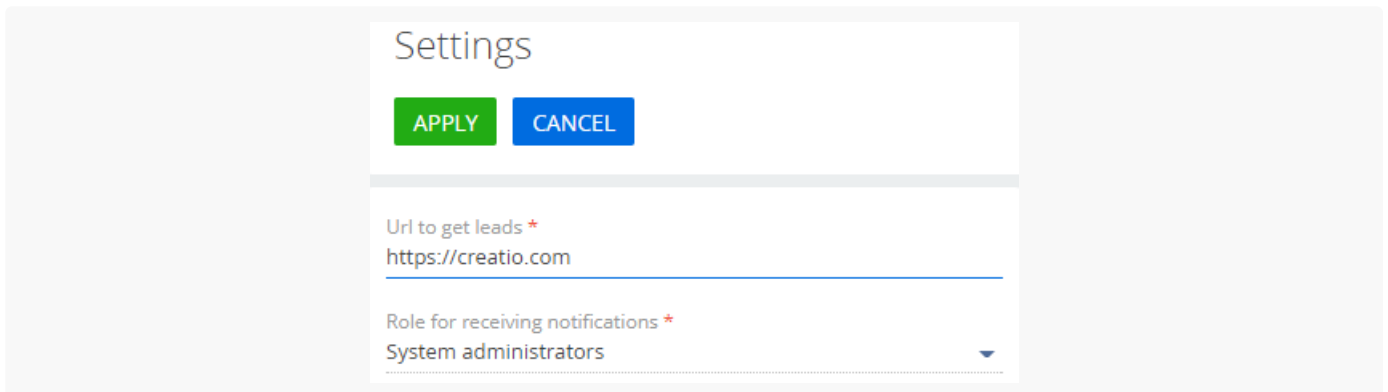
1. Click the  button to open the System Designer.

2. Go to the “Import and integration” block → “Social lead generation service settings.” The [ *Settings* ] page will open automatically.
3. Enter the URL of Creatio instance where you want to register leads in the [ *Url to get leads* ] field (Fig. 1) on the [ *Settings* ] page. By default, Creatio will populate the field with the URL from the browser tab.

**Note.** The URL has to be accessible worldwide for the integration to work correctly. If your Creatio instance must be located in a private network, contact Creatio support to receive the list of IP addresses to whitelist.

4. Select the role that will receive the lead generation related [system messages](#) in the [ *Role for receiving notifications* ] field (Fig. 1).
5. Click [ *Apply* ].

Fig. 1 The [ *Url to get leads* ] field



6. Click [ *New* ] in the [ *Social leadgen integrations* ] section list. This will open a dialog box.
7. Specify the ad account to integrate in the box:
  - a. Select “LinkedIn” → [ *Next* ].
  - b. Sign in to the LinkedIn user account that meets the prerequisites and grant permissions to Creatio → [ *Next* ].  
You only need to grant permissions once per LinkedIn user account.
  - c. Select the checkboxes next to the ad accounts grant Creatio access to them → [ *Next* ].  
You only need to perform this step once per LinkedIn user account.
  - d. Select the ad account for this integration in the dropdown list → [ *Next* ].
8. Enter the custom integration name in the [ *Name* ] field in the left area (optional).
9. Repeat steps 6-8 for the other relevant ad accounts (optional).

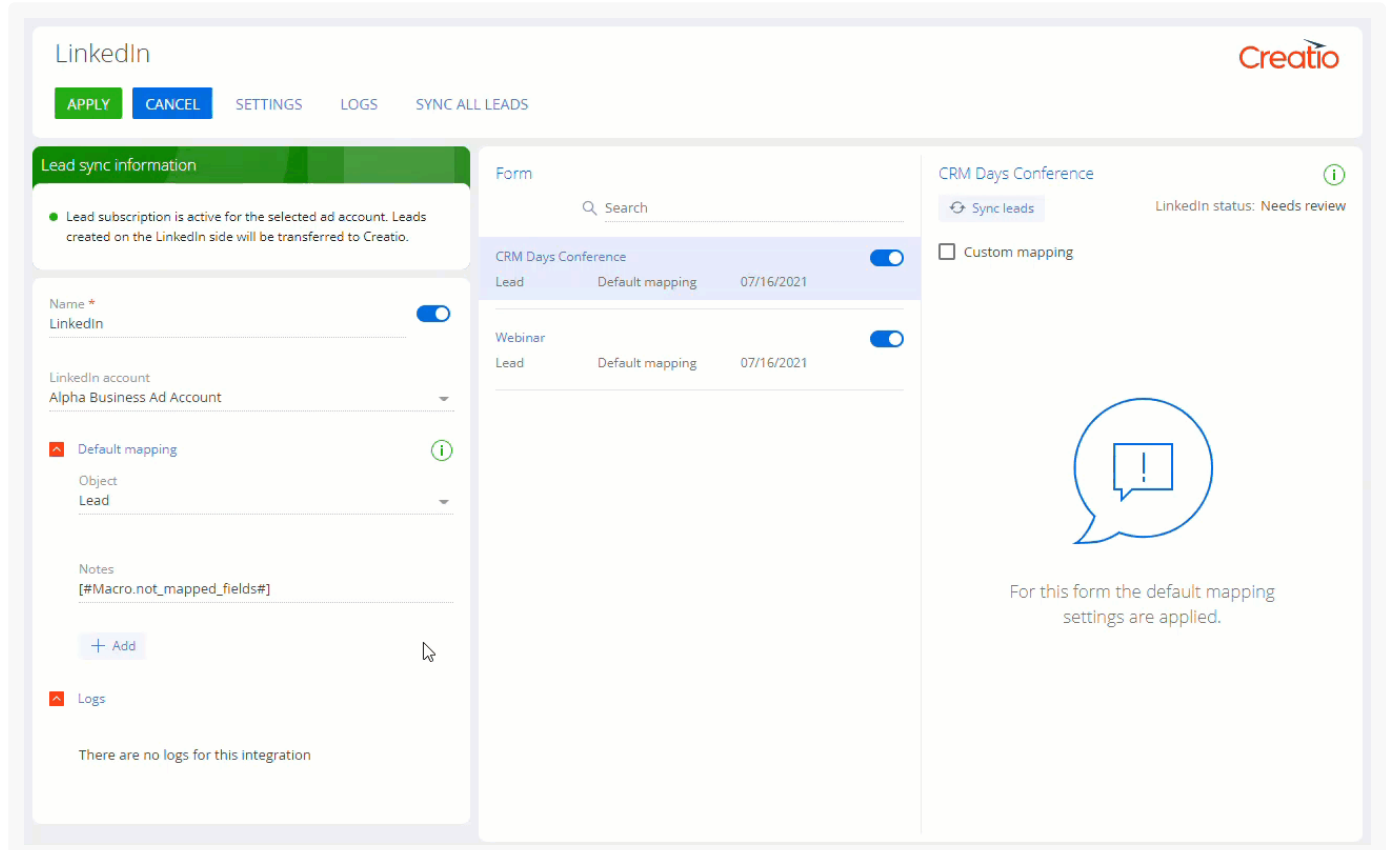
As a result, Creatio will add a new LinkedIn ad account integration.

## Step 2. Set up default mapping

Creatio automatically imports data of ad campaign, ad banner, and lead generation form that are connected to the lead to the [ *Extended lead information* ] detail on the lead page. To ensure Creatio populates new leads using the profile data of LinkedIn users who fill out the lead generation form, map the default fields. To do this:

1. Go to the [ *Default mapping* ] detail in the left area → [ *Add* ].
2. Select the columns of the [ *Lead* ] object to map → [ *Select* ].
3. Hover over the relevant column → the ⚡ button → fill out the field (Fig. 2) in one of the following ways:

Fig. 2 Mapping a form field to Creatio column



- Click [ *Form field* ] and select a LinkedIn form field. Creatio will populate this column with the values leads enter in the corresponding field.
  - Click [ *Text value* ] and enter a constant value. Creatio will populate the column with this value for all registered leads.
  - Click [ *Boolean value* ] and specify a “true” or “false” value. Creatio will populate the column with this value for all registered leads (for boolean fields).
  - Click [ *Lookup value* ] and select a lookup value. Creatio will populate the column with this value for all registered leads (for lookup fields).
  - If there is no column mapped to the “**not\_mapped\_fields**” macro, click [ *Other* ] → [ *Unmapped form fields* ] to map a column to the macro. Creatio will populate this column with the data of the entire form submission (for string fields).
4. Repeat step 3 for all needed fields. We recommend mapping all form fields to Creatio columns to ensure you receive all the relevant data.
  5. Click [ *Apply* ].

### Step 3. Set up custom mapping (optional)

Set up custom mapping to map the fields of the “Lead details & custom questions”, “Custom checkboxes”, and “Hidden fields” sections of a specific LinkedIn form to Creatio columns or specify constant values in Creatio columns. To do this:

1. Select one of your LinkedIn ad account forms in the [ *Form* ] list.
2. Go to the setup area to the right of the list → select the [ *Custom mapping* ] checkbox.
3. Click [ *Add* ].
4. Fill out the fields similarly to default mapping.
5. Click [ *Apply* ].

As a result, Creatio will register the future leads with unique LinkedIn IDs captured by your LinkedIn forms. For test forms LinkedIn creates only one lead per user per day. If you submit the same form multiple times during a day, LinkedIn updates the existing lead. When you launch an ad campaign this limit is removed automatically.

The existing duplicate search rules apply to the registered leads as well. Learn more in separate articles: [Lead duplicate search](#), [Find and merge duplicates](#).

## Synchronize leads captured prior to the integration

Creatio will register only the leads captured after you set up the integration automatically. To register the previously captured leads:


1. Click the  button to open the System Designer.
2. Go to the “Import and integration” block → “Social lead generation service settings.”
3. Open the relevant integration record.
4. Click [ *Sync all leads* ] on the toolbar to register leads from the entire account. Alternatively, click [ *Sync leads* ] in the setup area of the needed form to register leads captured by a specific form (Fig. 3).

Fig. 3 The lead synchronization buttons



The screenshot displays the LinkedIn integration settings in Creatio. At the top, there are buttons for 'CLOSE', 'SETTINGS', 'LOGS', and 'SYNC ALL LEADS'. Below this is a 'Lead sync information' section with a green header and a status indicator. The main area is divided into three columns: 'Form' (containing a table of forms), 'CRM Days Conference' (form configuration), and 'CRM Days Conference' (field mapping). The 'Sync leads' button in the 'CRM Days Conference' section is highlighted with a red box.

Form	Lead	Custom mapping	07/16/2021	Toggle
CRM Days Conference	Lead	Custom mapping	07/16/2021	On
Webinar	Lead	Default mapping	07/16/2021	On

5. Specify the lead capture period within the last 90 days in the box that opens. Creatio will calculate the period using calendar dates regardless of the integration status at the time.

6. Click [ *Sync* ].

As a result, Creatio will register leads with unique LinkedIn lead IDs for the corresponding period.

## Synchronize changes in an active lead generation form


If you add new fields to your LinkedIn form, update the mapping in Creatio. Otherwise, Creatio will import data of new form fields only using the “**not\_mapped\_fields**” macro.

When you rename a form in LinkedIn, the form name in Creatio remains unchanged. You can update the name manually in the [ *Lead forms* ] (“LeadGenLeadForms” code) lookup.

## Disable the LinkedIn lead generation integration

There are several ways to disable the integration that accommodate for different needs and security requirements. For example, toggle off the integration on Creatio's end while keeping your LinkedIn user and ad account tokens or the tokens themselves.

### Toggle off lead registration from the form or the account

1. Click the  button to open the System Designer.
2. Go to the “Import and integration” block → “Social lead generation service settings.”

3. Open the integration record.
4. Toggle off the switch next to the form in the [ *Form* ] list or the [ *Name* ] field in the left area, respectively (Fig. 4).

Fig. 4 The lead registration toggles

5. Click [ *Apply* ].

As a result, Creatio will stop registering leads captured by the form or the account. Toggle the corresponding switch back on to resume lead registration.

## Revoke your LinkedIn user account token








1. Click the  button to open the System Designer.
2. Go to the “Import and integration” block → “Social lead generation service settings.”
3. Click [ *Settings* ].
4. Click the  button next to your LinkedIn user account in the [ *LinkedIn ad accounts* ] detail → [ *Delete* ] → confirm the deletion (Fig. 5).

Fig. 5 Revoke a LinkedIn token

LinkedIn ad accounts				
Account name	Link	Connection status	Expiration date	
 Alpha Business Ad Account	<a href="https://www.linkedin.com/campaignmanager/accounts/123456789">https://www.linkedin.com/campaignmanager/accounts/123456789</a>	Active	08/18/2022	⋮
Network user	Token status	Expiration date	Provides access to account	
John Best	Active	08/18/2022	Yes	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">           Delete             Reconnect         </div>

As a result, Creatio will no longer use your LinkedIn user account to access the LinkedIn ad account. If your token is the only one that provides access to the ad account, revoking it will disable lead registration from the account.

## Disconnect the LinkedIn ad account

1. Click the  button to open the System Designer.
2. Go to the "Import and integration" block → "Social lead generation service settings."
3. Click the  button next to the integration that uses the corresponding ad account → [ *Delete* ] → confirm the deletion.
4. Click [ *Settings* ].
5. Click the  button next to the ad account in the [ *LinkedIn ad accounts* ] detail → [ *Delete* ] → confirm the deletion.

As a result, Creatio will lose access to your LinkedIn ad account and will be unable to register new leads.