

Microsoft Forms Connector - Creatio

Installation Guide

AgilizTech support@agiliztech.com







Contents

Overview
Outline2
Business use case
Solution2
Benefits2
Guide For Using the Connector2
Steps to Install Microsoft Forms Connector
Automated Microsoft Cloud flow procedure4
Step 1: Microsoft Forms Creation
Step 2: Setting up Landing page6
Step 3: Create Automated Microsoft Flow to capture a Lead into Creatio.
Step 4: Setting Up automated process flow to insert the record into Creatio8
Step 5: Lead creation







Overview

Outline

This Connector is used to create a lead automatically when a Microsoft Form is submitted.

Business use case

A lead has to be created through various sales funnel right after identifying the target audience.

Using Microsoft Forms Connector, a lead is created in Creatio by an automatic process without any interruption from Microsoft Form submission. A lead can be nurtured then and converted into a successful sale.

Solution

Any business organization (owns Creatio Marketing, Creatio Service – Customer Center, Service Enterprise) who is seeking for a lead creation through landing page & web forms.

Benefits

- Any business organization can significantly reduce the time take to generate a lead.
- Ability to create a Lead, Events registration and other web forms enable you to transfer the form responses to any Creatio system objects (Ex. Lead, Event objects).
- Ability to create a record for custom objects of Creatio.

Guide For Using the Connector



CreatioSolution

We will provide Microsoft Forms Connector in a ZIP (CreatioSolution.zip) package

Steps to Install Microsoft Forms Connector.

- 1. Kindly go to the following link <u>https://flow.microsoft.com/</u> and select Power Automate.
- 2. Select the solutions options in the left panel (Menu item).







3. Click import as depicted below,

-											
=			+ N	lew solution ← Import 📋 Open AppSource	📑 Publish a	Il customizations □"	Switch to classic 🗧	See history		\equiv All $\scriptstyle{\vee}$	✓ Search
ŵ	Home			Project		msdyn_ProjectServic	2/14/2021	1.0.11.162	A		Checked by publ
Ċ	Action items	\sim		Project		msdyn_ProjectServic	2/14/2021	1.0.0.87	۵		Checked by publ
₀⁄¤	My flows			Unified Resource Scheduling Upgrade Scripts		UnifiedResourceSche	2/14/2021	1.0.4.3033	A		Checked by publ
+	Create			Universal Resource Scheduling		MicrosoftDynamicsS	2/14/2021	4.0.36.20	۵		Checked by publ
ත්	Templates			Universal Resource Scheduling		MicrosoftDynamicsS	2/14/2021	4.0.0.40	۵		Checked by publ
ц ^о	Connectors			Scheduling Patch		msdynce_Scheduling	2/14/2021	9.0.5.0	A		Checked by Micr
٥	Data	~		Scheduling		msdynce_Scheduling	2/14/2021	9.0.0.0	۵		Checked by Micr
	Monitor	~	\bigcirc	Portfolio Service Solution		PortfolioService_Anc	2/14/2021	0.8.7.69	A		Checked by Micr
ංයු	Al Builder	~		Portfolio Service		PortfolioService_Patc	2/14/2021	0.8.7.69	A		Checked by Micr
(<u>f</u>)	Process advisor	~		Portfolio Service		PortfolioService	2/14/2021	0.8.5.0	A		Checked by Micr
	Solutions			Power Apps Checker Base		msdyn_PowerAppsC	2/14/2021	1.2.0.34	A		Checked by publ
Û	Learn			Power Apps Checker		msdyn_PowerAppsC	2/14/2021	1.2.0.34	A		Checked by publ
				Contextual Help Base		msdyn_ContextualH	2/14/2021	1.0.0.22	A		Checked by publ
				Contextual Help		msdyn_ContextualH	2/14/2021	1.0.0.22	A		Checked by publ
				c proceptions					<u>^</u>		

4. Select Browse and select the provided zip package.

=			+ N	ew solution 🔶 Import 📋 Open AppSource 🗖	Publish al	Il customizations	□" Switch to clas	Import a solution ×
ŵ	Home			Project		msdyn_ProjectServic	2/14/202	Environment agilitetch.com (default) Close
Ĉ	Action items	\sim		Project		msdyn_ProjectServic	2/14/202	Select a file
o⁄°	My flows			Unified Resource Scheduling Upgrade Scripts		UnifiedResourceSch	e 2/14/202	Browse for the solution file to import.
+	Create			Universal Resource Scheduling		MicrosoftDynamicsS	2/14/202	Browse No file chosen
ත්	Templates			Universal Resource Scheduling		MicrosoftDynamicsS	2/14/202	
¢0	Connectors			Scheduling Patch		msdynce_Scheduling	g 2/14/202	
٥	Data	~		Scheduling		msdynce_Scheduling	2/14/202	
	Monitor	~		Portfolio Service Solution		PortfolioService_And	2/14/202	
ଂପ୍ତ	Al Builder	~		Portfolio Service		PortfolioService_Pate	2/14/202	
(<u>‡</u> ,)	Process advisor	~		Portfolio Service		PortfolioService	2/14/202	
	Solutions			Power Apps Checker Base		msdyn_PowerAppsC	2/14/202	
	Learn			Power Apps Checker		msdyn_PowerAppsC	2/14/202	
				Contextual Help Base		msdyn_ContextualH	2/14/202	
				Contextual Help		msdyn_ContextualH	2/14/202	Next Cancel
				Common Data Constant Dafasik Collision		0.70460	244/202	

Then, click on import button once you selected the provided CreztioSolution.zip package.







5. The solution gets installed successfully and you can consume our Microsoft Forms connector for Creatio. On successful installation it is seen that Creatio solution is added in the list as below.

=			+ New solution ← Import 🖞 Open AppSource 🗖	Publish a	all customizations 📑 Sw	vitch to classic 🕚 See hi	story	\equiv All $\scriptstyle{\vee}$	✓ Search
命	Home		Solutions						
Ď	Action items	\sim							
₀⁄¤	My flows		Display name		Name	Created \downarrow	Version	Managed externally?	Solution check
+	Create		Creatio Solution		CreatioSolution	6/30/2021	1.0.0.0	a	Results as of 4:08
යයි	Templates		Project		msdyn_ProjectServic	2/14/2021	1.0.11.162	8	Checked by publ
¢0	Connectors		Project		msdyn_ProjectServic	2/14/2021	1.0.11.162	A	Checked by publ
0	Data	\sim	Project		msdyn_ProjectServic	2/14/2021	1.0.0.87	A	Checked by publ
	Monitor	~	Unified Resource Scheduling Upgrade Scripts		UnifiedResourceSche	2/14/2021	1.0.4.3033	A	Checked by publ
۰Ĝ	Al Builder	\sim	Universal Resource Scheduling		MicrosoftDynamicsS	2/14/2021	4.0.36.20	A	Checked by publ
$(\underline{\hat{I}}_{a})$	Process advisor	\sim	Universal Resource Scheduling		MicrosoftDynamicsS	2/14/2021	4.0.0.40	A	Checked by publ
	Solutions		Scheduling Patch		msdynce_Scheduling	2/14/2021	9.0.5.0	A	Checked by Micr
	Learn		Scheduling		msdynce_Scheduling	2/14/2021	9.0.0.0	A	Checked by Micr
			Portfolio Service Solution		PortfolioService_Anc	2/14/2021	0.8.7.69	A	Checked by Micr
			Portfolio Service		PortfolioService_Patc	2/14/2021	0.8.7.69	A	Checked by Micr
			Portfolio Service		PortfolioService	2/14/2021	0.8.5.0	A	Checked by Micr

Automated Microsoft Cloud flow procedure

Step 1: Microsoft Forms Creation

1. Go to the following link <u>https://flow.microsoft.com/</u> and select Forms to create a customized Microsoft Forms pertaining to the business need.

A form can be created with the following fields,

- •Text (line)
- •Text (Paragraph)
- •Date/Time
- •Number
- •Email
- •Drop-down List,

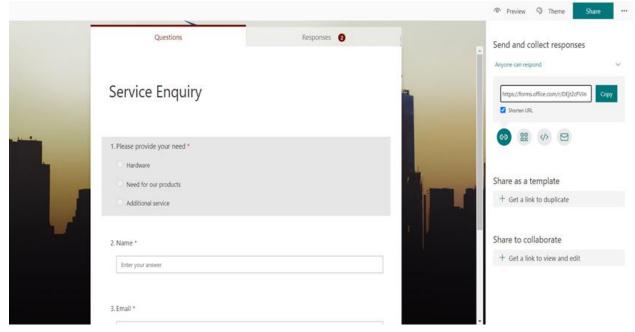




Microsoft Form creation,

	Forms		𝒫 Search			r > ©	?	BP
â		+ New Form						^
\oplus		+ New Form						
w		Recent Pinned Shared with me			Type to filter list			
x								
•			Q	2				
0								
•			No shared form	s or quizzes				
a .			You don't have any form	s shared with you.	All My Forms $ ightarrow$			
4								
цi								
5		My groups						
B		izTech - Service Delivery Team	Total 0 forms	AgilizTech - All	Total 0 forms	📮 Feed	back	.

2. Shorten the URL and Copy the URL which routes to the Created Microsoft form.







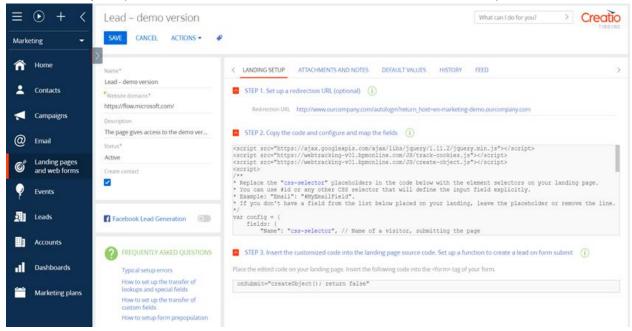


Step 2: Setting up Landing page.

•Open the service or Marketing Workspace in the Creatio and choose the Landing Pages and Web Forms section.

- •Click on New and select Lead registration form.
- Provide the new landing page name for Lead registration.

•Set the value of Website Domain as https://flow.microsoft.com/ Since Creatio system should know the root of the request (the source from where the API call is made for Authentication)



Note: The Create Contact checkbox can be activated to create a contact automatically when the Microsoft form is submitted. (The checkbox is disabled by default).

Step 3: Create Automated Microsoft Flow to capture a Lead into Creatio.

1.Go to the following link https://flow.microsoft.com/ and select Power Automate to create flows. 2.Select My flows in the left panel.

- 3.Click on New flow and select Automated cloud flow.
- 4. Provide a name for the custom created flow.

5.*Select your Flows trigger. Kindly choose the values as "When a new response is submitted".6.Click on create.





a) Flow creation, O Search = + New flow ~ Start from a template Install \sim 2 Template D Action items usiness process flows Shared with me 😨 Visio template o/^d My flows Build your own from blank + Create .. a Automated cloud flow 2 Templates S Instant cloud flow o^g Connectors Scheduled cloud flow 🖯 Data Desktop flow R Business process flow Monitor ୍ଟ Al Builder You don't have any desktop flows Desktop Rows automate business processes on your desktop environment via Power Automate Desktop. Select + New desktop flow to get started. <u>Learn more</u> (i) Process advisor Solutions + New desktop flow Learn

b) Building an automated cloud flow,

			+ New flow	~			,P Search	
ŵ	Home		Flows	Build an automated cloud flow		×	Install Y	
Ċ	Action items	\sim	Cloud flows		Flow name		î l	
~	My flows			× ~	Creatio Lead Capture			
+	Create				Choose your flow's trigger * ()			
න්	Templates							
ъq	Connectors				 When a new response is submitted Microsoft Forms 	0		
8	Data	×			When an item is created SharePoint	0		
	Monitor	~		Free yourself from repetitive work just by connecting the apps you already use—automate alerts, reports, and other tasks.	When an item is created or modified SharePoint	0		
ŝ	Al Builder	Ň		Examples: • Automatically collect and store data in business solutions	When a file is created in a folder SharePoint	Ū		
(£)	Process advisor			Generate reports via custom queries on your SQL database	When a file is created	~		
	Solutions				CneDrive for Business	0		
۵	Learn				When a task is assigned to me	0		
					Skip Create	Cancel		







Step 4: Setting Up automated process flow to insert the record into Creatio.

1.Select the Form Response you wanted to capture form the dropdown that you have created in Step 1 & 2.

=			creatio service enquiry				层 Save	😵 Flow checker	👗 Test
ŵ	Home			When a new r	esponse is submitted	Show options			
D	Action items	~		*Form Id	Service Enquiry				
₀∕0	My flows				and a start of the	~			
+	Create								
43	Templates				+ New step Save				
ø	Connectors								
0	Data	~							
-									

2. Click on New Step,

Search for Forms and select the Forms in the result and select the Get response details to receive the response details of the submitted form.

=		creatio service enquiry			🗟 Save 🔮 Flow checker 👗 Test
ŵ	Home		When a new response is submitted	····	
D	Action items $\qquad \qquad \qquad$				
o∕°	My flows		Microsoft Forms	οx	
$^+$	Create				
ත්	Templates		Search connectors and actions		
69	Connectors		Triggers Actions	See more	
0	Data \lor		Get response details Microsoft Forms	0	
	Monitor ~		Don't see what you need?		
۰đ	Al Builder $\qquad \checkmark$		Help us decide which connectors and triggers to add next with User/Voice		
(<u>f.</u>)	Process advisor \sim				
	Solutions				
	Learn				







3.Select the Form id as the form that you have created and the provide the response Id selected from the dynamic content. Then, Click on Next Step.

=			creatio service enquiry				🗟 Save 😵 Flow checker 👗 Test
ŵ	Home		6	When a new re	esponse is submitted	····	í
ß	Action items	~		2	(†)		
o/0	My flows		¢.	Get response of	dotaile	····	
+	Create						
43	Templates			orm ld esponse ld	Service Enquiry	~	
69	Connectors		-	esponse io	Unique identifier of the response	Add dynamic content	Barris Canada
8	Data	~					Dynamic content Expression
	Monitor	~			+ New step Save		P Search dynamic content
•3	Al Builder	<u> </u>			- Hen step - Sure		When a new response is submitted
(L)	Process advisor						Response Id Unique identifier of the response. Use with 'Get response
5	Solutions						
۵	Learn						

4. Select the Creatio connector from the custom tab and select Creatio in the Action tab too.

≡			creatio service enquiry				🗟 Save 战 Flow checker 👗 Test
ඛ	Home		E	When a new re	sponse is submitted	···· (5)	
Ċ	Action items	\sim	_				
₀⁄¤	My flows		ŧ.		V	···· ⑦	
+	Create		4	Get response d	letaiis	0	
ත්	Templates				\checkmark	_	
ø	Connectors			cotio Creatio		···· ③	
0	Data	\sim		instance_name			
	Monitor	\sim		formFieldsData name -	formld		
ଂଓ	Al Builder	\sim		name		đ	
$(\widehat{\underline{I}_{n}})$	Process advisor	\sim		formFieldsData value - 1 value	1		
	Solutions			+ Add new item			
	Learn						
					+ New step Save		

A Custom Creatio connector is added to the automated flow.

Note:

1.Instance_Name: Domain name of the source Creatio site.2.formid: ID of the New landing page created in Creatio (Step 2).ID, can be found here (Step 2)





Ξ	• + <	Lead - demo version	What can I do for you? > Creatio
Servic	e 👻	SAVE CANCEL ACTIONS -	P
2	Configuration items	Description The page gives access to the demo ver	STEP 2. Copy the code and configure and map the fields 1
R	Problems	Status* Active	"City": "css-selector", // City "Country": "css-selector", // Country "Comentary": "css-selector" // Notes
7	Changes	Create contact), landingId: " <mark>GC240564-a00cc4165-a8669-19045197A156</mark> ", serviceUz1: "http://localhost.88///ServiceModel/GeneratedObjectWebFormService.svc/SaveWebFormObjectData",
6	Releases		redirectDrl: "http://www.ourcompany.com/autologin?return_hostwen-marketing-demo.ourcompany.com" /** * The function below creates a object from the submitted data.
	Knowledge base	Facebook Lead Generation	* Bid this function below treates a ubject item the summittee data. * Bid this function call to the "onsikumit" event of the form or any other elements events. * Example: <form class="mainForm" name="landingForm" onsukmit="createObject(); return false"> */</form>
12	Queues	PREQUENTLY ASKED QUESTIONS	STEP 3. Insert the customized code into the landing page source code. Set up a function to create a lead on form submit ①
12	Queues settings	Typical setup errors How to set up the transfer of lookups and special fields	Place the edited code on your landing page. Insert the following code into the -dorms-tag of your form. onSubmit="createObject(); return false"
Ċ	Landing pages and web forms	How to set up the transfer of	

5.Bind the form response to the Fields of the Creatio Object and click on save.

=			creatio service enquiry				🔚 Save 😗 Flow checker 🛕 Test
ŵ	Home			Creatio Creatio		٢	•
0	Action items			*instance_name	099744-crm-bundle		
U	Action items			formid	f9da26a5+184d+4821+b373+9dtd36r68999		
0,0	My flows			formFieldsData name		. 1	'n
+	Create			Contact			
42	Templates			formFieldsData value	Add dynamic content	5	Dynamic content Expression
60	Connectors			Name x			
0	Data	~		formFieldsData name 2	•		Get response details
	Monitor	~		MobilePhone			
		~		formFieldsData value			Answer to the question above
eg.	Al Builder				CALCONFORM.		Answer to the question above
(E)	Process advisor	×.		formFieldsData name 3	*:		Contact Number Answer to the question above
63	Solutions			Email			
Ω	Learn			formFieldsData value	**3		Answer to the question above
144	(COMPT)			formFieldsData name			Responders' Email Email address of responder who submitted the form
				4 LeadType			Submission time Timestamp when a new response is submitted
				formFieldsData value			When a new response is submitted

NOTE: The Creatio object field name should be provided in formFieldsData name and dynamic response is given to corresponding formFieldsData value to map the field values of Microsoft forms to the field of Creatio object.

Step 5: Lead creation.

- 1. The target audience/user submits the Microsoft Form.
- 2. Automated flow process is triggered in Power Automate.

3. Collect the response from the submitted form and then Creatio connector is executed which insert data into Creatio Object.





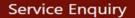
Form Submission,

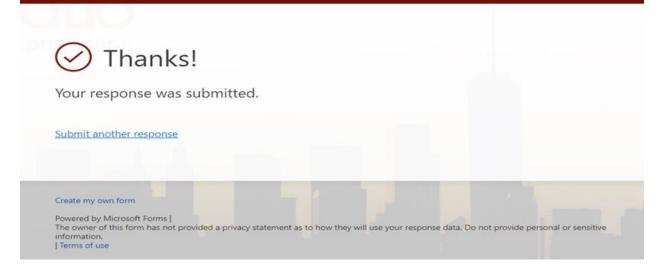
	Service Enquiry	
Creatio formerly bpm'online	* Regined 1. Resse provide you'n reed *	
	2. Nome * Broodsain Palanivelu 3. Small * 4. Contact Number * 8005004 Submit For give at pur passed: Report duae	
	This content is unable by the same of the form, The side you submit will be user to the form source Monsult in not responsible for the intervent of the formation of the same in the same formation of the form source (or any programmer). The neuron of the formation of provided a privacy softwarent acts to how they will car prox response data. Do net provide provide or venalitie advanced of the formation of provided a privacy softwarent acts to how they will car prox response data. Do net provide provide or venalities advanced of the formation of provided a privacy softwarent acts to how they will car prox response data. Do net provide provide or venalities (intervent).	

Note: Form fields are entered corresponding to the field type.









Microsoft Automated Cloud flow execution,

When a new response is submitted	Os
↓	
Get response details	0s
↓	
Creatio Creatio	17s

Lead Created in Creatio CRM

≡ ⊙ + <	Leads 🔳 🗐				What can I do	for you? Creatio		
Sales 👻	NEW LEAD ACTIONS					VIEW *		
A Home	A ▼ ፼ Filters/folders ▼	S + I Filters/folders + Ø Tag						
ff Home	Need type	Lead stage	Need maturity	Contact	Account	Mobile phone		
Dashboards	Hardware	Qualification	Suspected	Bhoobalan Palanivelu	AgilizTech	88005500		
Feed	OPEN COPY DELE							
	Software	Satisfied	Sales-ready	Alice Phillips	Axiom	+1 404 389 0476		
Leads	Opportunity management	Qualification	Suspected	Kelly Parker	Workflow Industries			

