USER GUIDE

Calendly Add-In for

Creatio

Index

Introduction

This add-in features a connector to Calendly, a meeting scheduling service, with Creatio.

Functionality

Combine Creatio's versatility with Calendly's meeting scheduling service.

Every new meeting created or canceled by your contacts in your Calendly account will synchronize with your Activities, Contacts and Leads in your Creatio instance.

When a new call is scheduled in Calendly it will create a new activity in Creatio, assigned to the corresponding user. If the contact´s email is not found in Creatio, a new contact will be created and linked to the activity.
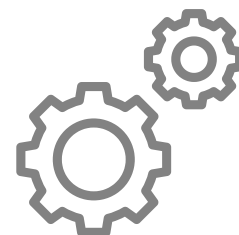
For every new scheduled call, a Lead record is also added in Creatio, making it easier to identify leads in Creatio.

In addition, if the contact already exists, the event will simply be added to the existing record without duplicating your contacts.

Furthermore, if your Calendly and your Creatio instance are both synchronizing with your Gmail or Outlook Calendar, then activities scheduled or updated in Creatio will update Calendly available slots.

Enjoy your Calendly connector for Creatio!

Installation

Step by Step

- 1. Request the corresponding licenses.

- 2. Install the package.

- 3. Request support to enable anonymous authentication follow the instructions in Additional Resources Enable HTTP/S support for a custom web service that uses anonymous authentication.

- 4. Manage the licenses for each Creatio/Calendly User and assign the free license for the System connection user.

- 5. Calendly Client Secret into Creatio per each user in your Profile ⟶ Calendly (Please refer to: https://developer.calendly.com/how-to-authenticate-with-personal-access-tokens to know how to obtain a token).

- 6. Fields mapping: (optional)

  a. Configure all Calendly Question in Creatio, including "Please share anything that will help prepare for our meeting." Into the lookup "Calendly Question".

  b. Configure the Fields mapping between Calendly questions and Creatio fields into the lookup "List of schemas Calendly".

- 7. Use it!

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