USER GUIDE

Airtable Connector For Creatio

v.1.0

Application Summary:

Airtable is a cloud platform, trusted by Marketing and Product teams worldwide. The Creatio Airtable Connector offers a flexible, real-time data integration solution for Creatio objects (such as Contacts, Leads, or Cases) by syncing them effortlessly with Airtable.

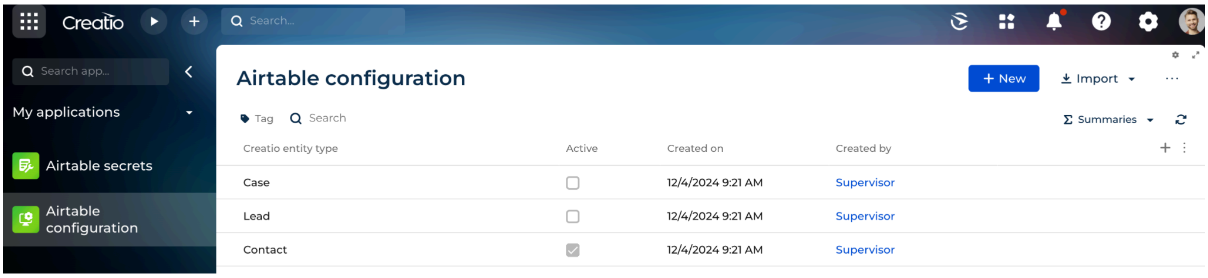
Once set up, the integration runs smoothly in the background, automatically updating your Airtable base whenever a record is added or modified in Creatio. The connector can even create the necessary columns in Airtable for your chosen objects, saving you time and effort.

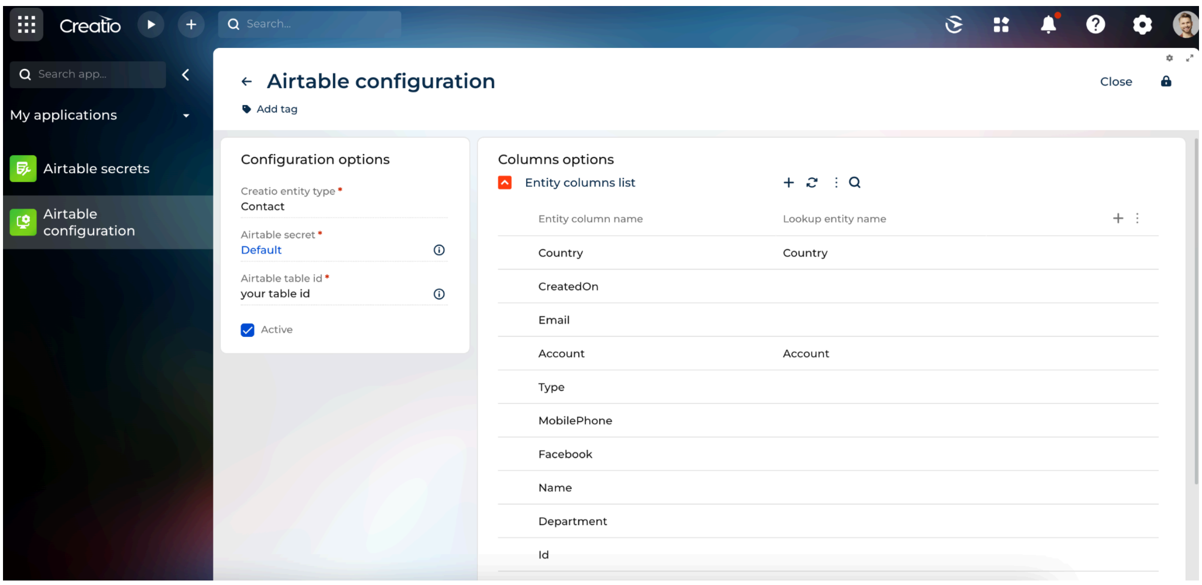
Stay in control with the detailed integration log, which provides administrators with comprehensive insights and updates on every sync.

Administration

Configuring the application

1. Admin users can use the Airtable Configuration section to access the pre-defined configuration records.. Fill in the fields and activate configuration records for required objects:.





Field hints provide the in-page guidance..
Airtable Token can be acquired here: https://airtable.com/create/tokens

Ensure that acquired token has the following scopes:

*Scopes

With this token, you will be able to:

`data.records:read`
See the data in records

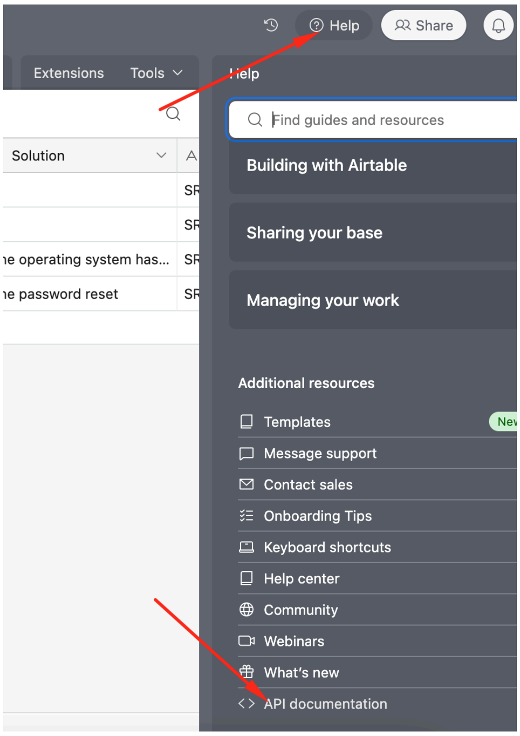
`data.records:write`
Create, edit, and delete records

`data.recordComments:read`
See comments in records

`schema.bases:read`
See the structure of a base, like table names or field types

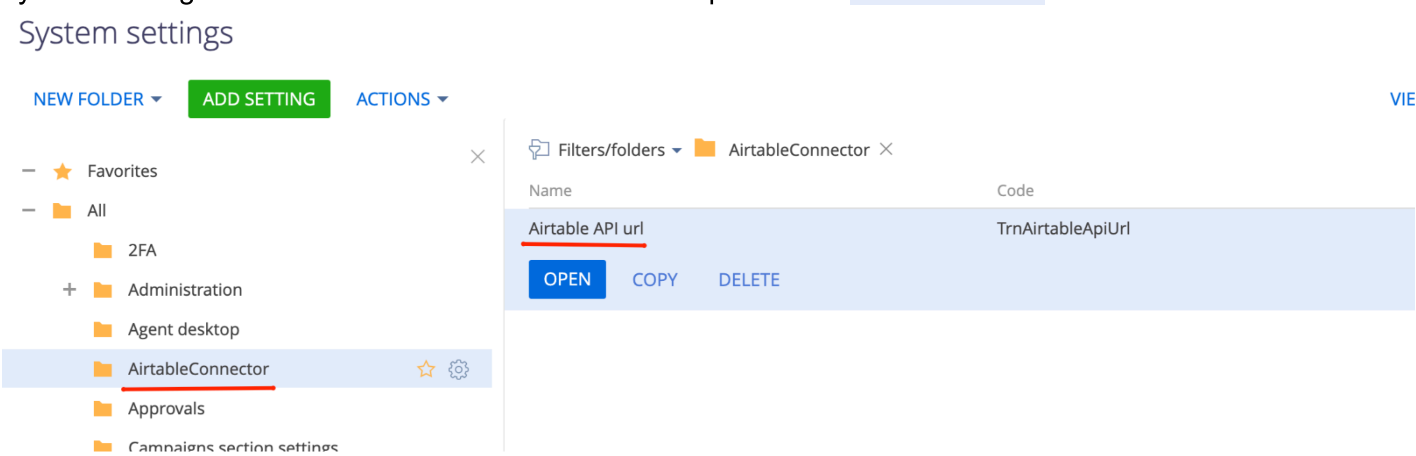
`schema.bases:write`
Edit the structure of a base, like adding new fields or tables

Other secrets can be discovered using Airtable API documentation::



2. Shall you need extended Airtable capabilities, ensure that you have a corresponding Airtable plan enabled: https://airtable.com/pricing

3. System Settings folder AirtableConnector contains the parameter Airtable API url.



4. Entity Columns Mappings — contains the configuration of fields and sequence of synchronization with Airtable. You can add any additional fields you need or remove those you don't. If a field is of the Lookup type, you need to specify its Lookup Entity Name in the Lookup Entity Name column. For

example, for the "Type" field, you should add "ContactType." If you don't do this, Airtable will send the field's GUID instead of the contact type name.

When adding new fields, they will automatically be created in the Airtable table. However, automatic field deletion in Airtable when removing them in the settings is not yet supported. Unnecessary fields can be manually deleted in Airtable, allowing you to double-check that you're not removing any important and needed data.

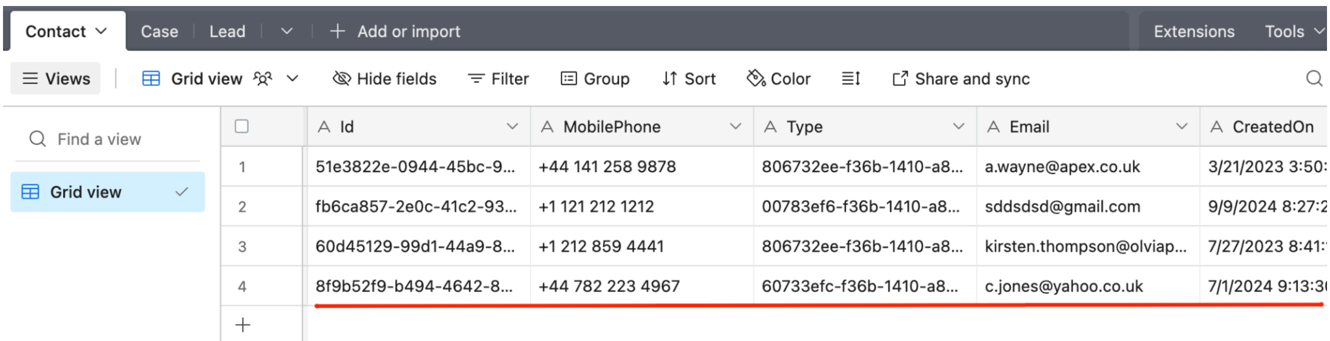
Troubleshooting

If something doesn't work as described above, you need to check the Process Log to understand how exactly the business process is being executed (whether its execution is interrupted at any step). If there's an error during execution, review the specific error details.

If you couldn't figure it out on your own, contact the application developer.

Using the connector

Suppose you have set up the integration for the Contact entity. To check how it works, go to the Contacts section in Creatio CRM and try adding a new contact or updating a couple of fields in an existing Contact. After saving the record, a new entry will appear in Airtable.



Next, you can similarly configure the Case and Lead entities and ensure that they are sent to Airtable when added or updated.

Application developer:

https://treran.com