

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.

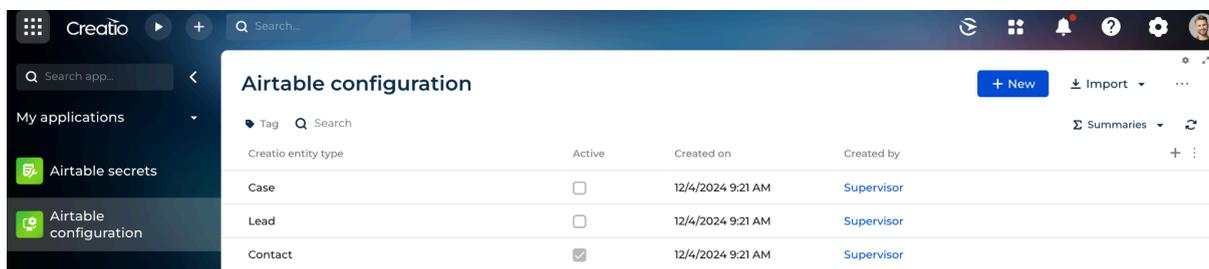
Once set up, the integration runs smoothly in the background, automatically updating your Airtable base whenever a record is added or modified in Creatio. The connector can even create the necessary columns in Airtable for your chosen objects, saving you time and effort.

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

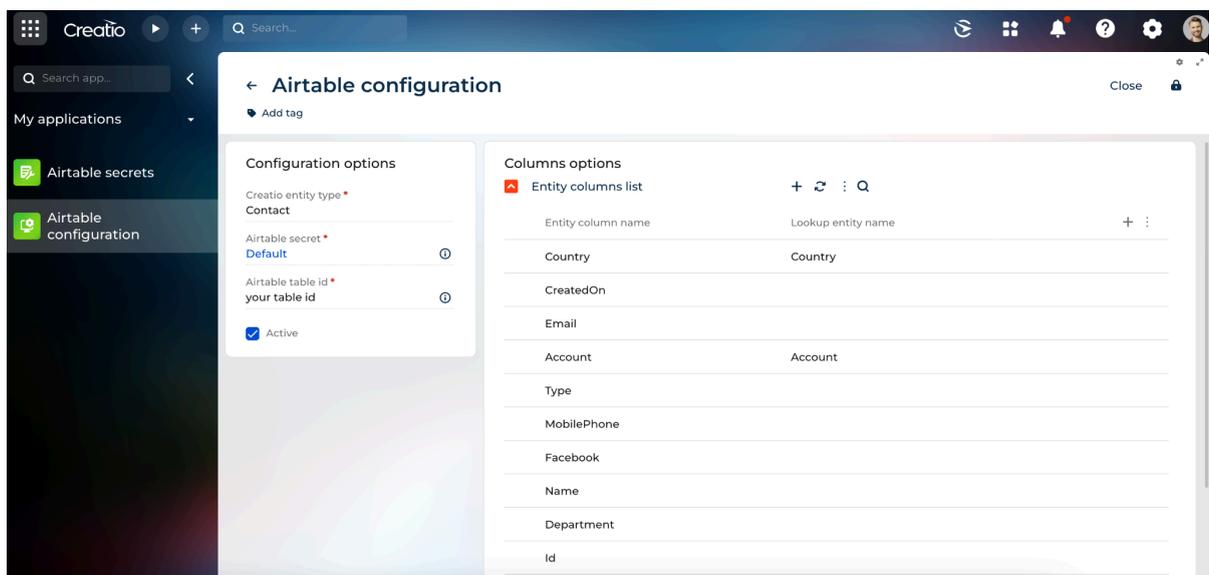
Administration

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:.



Tag	Search	Created on	Created by
Case		12/4/2024 9:21 AM	Supervisor
Lead		12/4/2024 9:21 AM	Supervisor
Contact		12/4/2024 9:21 AM	Supervisor



Configuration options

Creatio entity type *
Contact

Airtable secret *
Default

Airtable table id *
your table id

Active

Columns options

Entity columns list

Entity column name	Lookup entity name
Country	Country
CreatedOn	
Email	
Account	Account
Type	
MobilePhone	
Facebook	
Name	
Department	
Id	

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

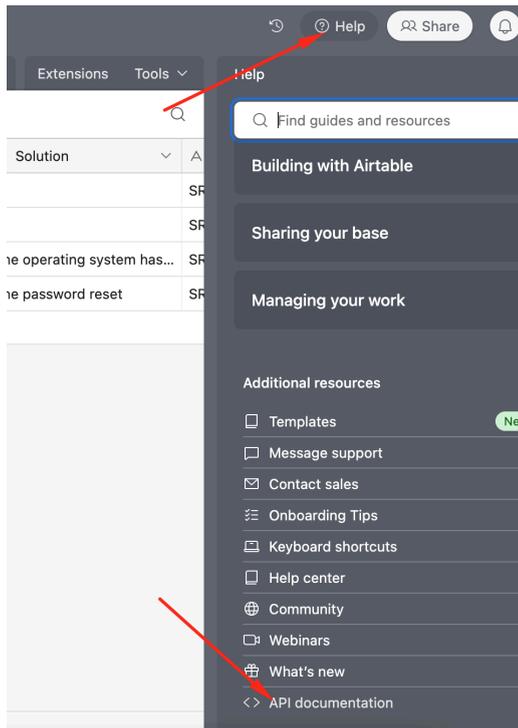
schema.bases:read

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

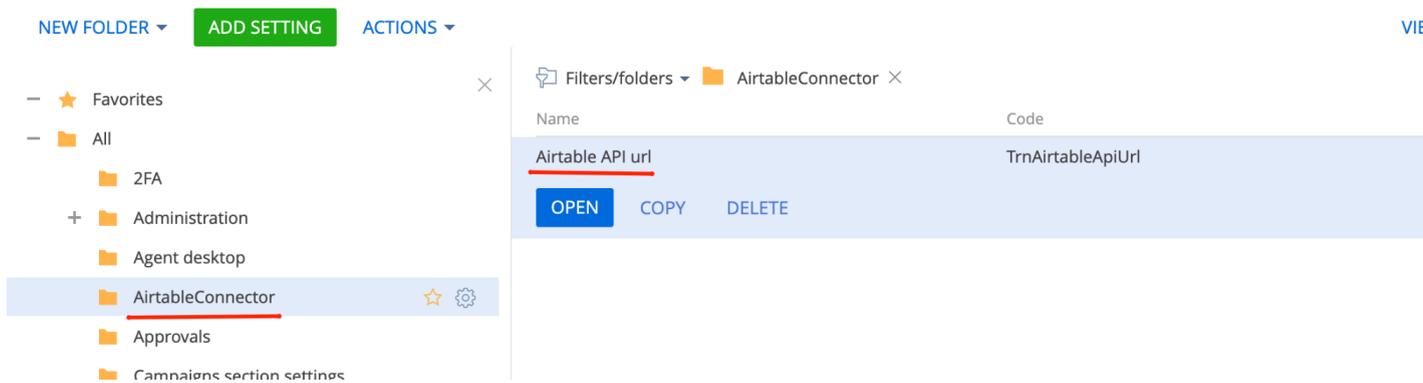
Other secrets can be discovered using Airtable API documentation::



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**.

System settings



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.



The screenshot shows a sidebar with navigation options: Process library, Process log (highlighted with a red arrow), Web services, and Webhooks. The main area displays a table of process steps:

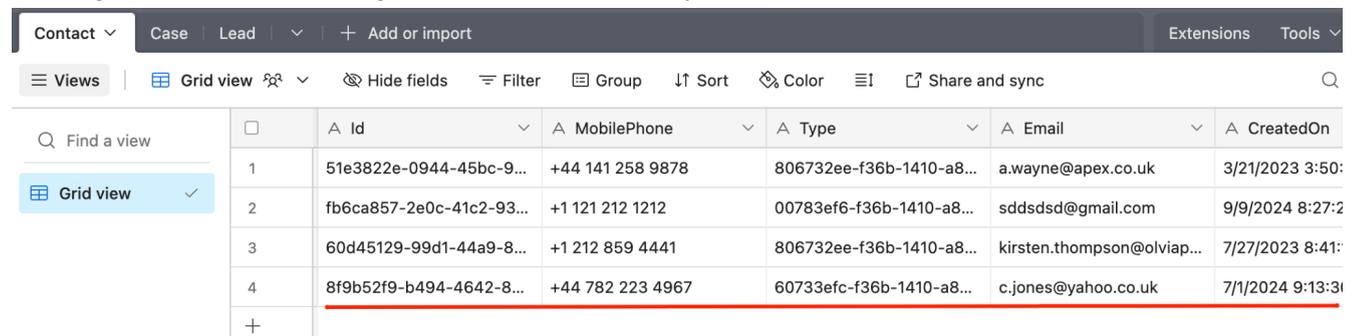
Step Name	Connector	Count	Status	Completion
Create column in Airtable	TrnAirtableConnect or	0	Maintainer	Compl
Upsert airtable record for Case	TrnAirtableConnect or	0	Maintainer	Compl
Create columns in Airtable	TrnAirtableConnect or	0	Maintainer	Compl
Upsert airtable record for Contact	TrnAirtableConnect or	1	Maintainer	Compl

Below the table are navigation buttons: OPEN, PROCESS DESIGNER, and EXECUTION DIAGRAM (underlined).

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.



The screenshot shows the Creatio CRM interface with a grid view of contacts. The table has the following columns: Id, MobilePhone, Type, Email, and CreatedOn.

	A Id	A MobilePhone	A Type	A Email	A CreatedOn
1	51e3822e-0944-45bc-9...	+44 141 258 9878	806732ee-f36b-1410-a8...	a.wayne@apex.co.uk	3/21/2023 3:50:
2	fb6ca857-2e0c-41c2-93...	+1 121 212 1212	00783ef6-f36b-1410-a8...	sddsdsd@gmail.com	9/9/2024 8:27:2
3	60d45129-99d1-44a9-8...	+1 212 859 4441	806732ee-f36b-1410-a8...	kirsten.thompson@olviap...	7/27/2023 8:41:
4	8f9b52f9-b494-4642-8...	+44 782 223 4967	60733efc-f36b-1410-a8...	c.jones@yahoo.co.uk	7/1/2024 9:13:31
+					

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>