

Install Apollo.io connector for Creatio

Apollo.io Connector for Creatio lets you enrich account and contact records in the Customer360 app quickly and easily with Apollo.io data.

You can also leverage the pre-configured web service methods in the app to set up enrichment processes for other objects.

The app has the following key features:

- Enrich your accounts and contacts with Apollo.io data.
- Specify rules by which to search for matching Creatio contacts: by personId, email, full name.
- Specify whether to overwrite existing Creatio data with Apollo.io data or only populate empty fields.
- Import new contacts from Apollo.io.

Install the app

To install the app, follow the instructions in Creatio documentation: [Install apps from the Marketplace](#).

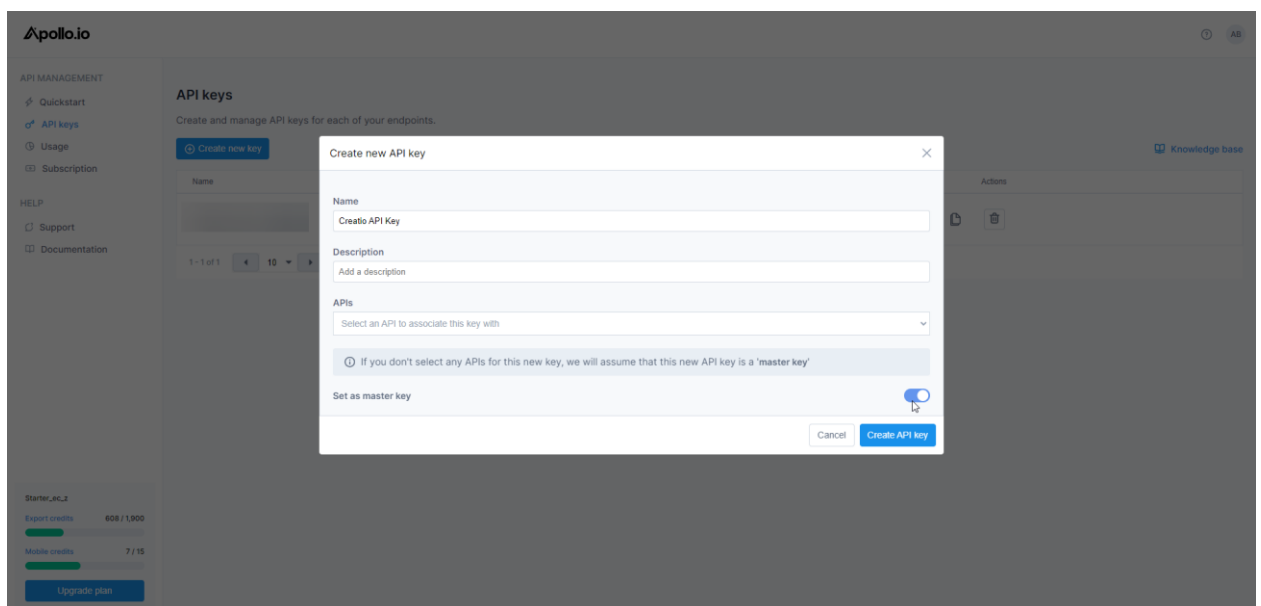
Download the Apollo.io connector for Creatio app via the following link: <https://marketplace.creatio.com/app/apolloio-connector-creatio>

The app is compatible only with FreedomUI. To switch Creatio to Freedom UI, follow the instructions: [Turn on Freedom UI](#).

Set up the app

First, create Apollo.io API key and add them to Creatio.

1. Open the Apollo.io Developer Portal: <https://developer.apollo.io/keys/>
2. Click [Create new key].
3. Enter an arbitrary name of the integration in the [Name] field. For example, "Creatio app."
4. Pose "Set as master key" parameter "On".



5. Copy generated API key.
6. Return to Creatio. Go to the [System setting] and enter value to the "Apollo API key" ("MrktApolloApiKey" code) system setting.

Second, specify how Apollo.io data is going to interact with your existing Creatio records. Manage the procedure in the “Overwrite existing data with data from Apollo.io” (“MrktOverwriteWithDataFromApollo code”) system setting.

This setting specifies whether Apollo.io data replaces existing data or overwrites it:

- When disabled (default), Creatio imports Apollo.io data only if the corresponding field is empty.
- When enabled, Creatio overwrites existing data with Apollo.io data.

Third, configure the app lookups.

Lookups for **accounts**:

- **Apollo industries.** Maps base values of industries from Apollo.io to values in Creatio.
Apollo number of account employees. Maps values of the number of account employees in Apollo.io to values in Creatio. Define the employee number range and map it to the values of the “No. of account employees” lookup. The enrichment process handles values from Apollo.io and compares it to the range in Creatio.
- **Annual revenue.** Maps values of the annual revenue in Apollo.io to values in Creatio. Define the revenue range. The enrichment process handles values from Apollo.io and compares it to the range in Creatio.

Note. If the enrichment process does not find mapped values, Creatio does not populate the corresponding account fields.

Account enrichment

Note. You can enrich an account record only if you connect a Apollo.io account to Creatio.

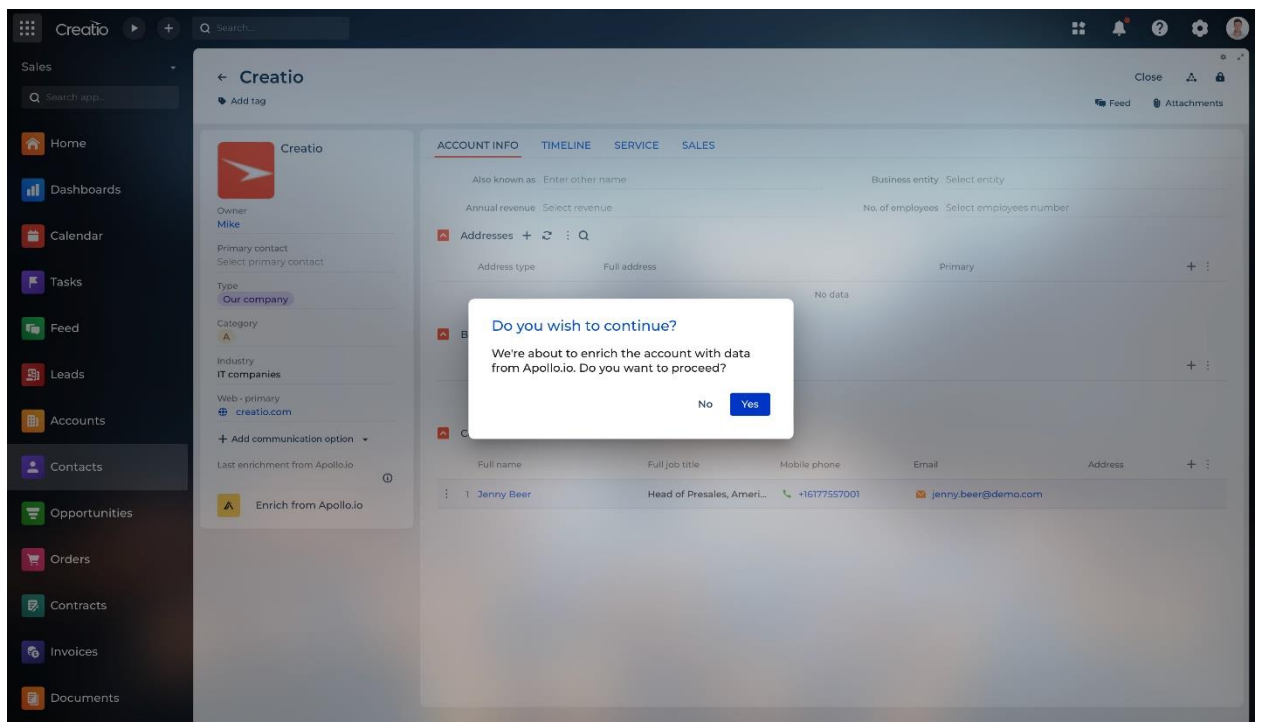
Field mapping between Apollo.io and Creatio is non-editable.

1. **Open** the **Accounts** section.
2. Select an account that has the “Web” or “Last enrichment from Apollo.io” fields populated.

Note. Creatio populates the “Last enrichment from Apollo.io” field after the first successful enrichment.

3. **Click** “Enrich from Apollo.io.”
As a result, Creatio will populate the following fields:
 - “Name”
 - “Industry”
 - “Annual revenue”
 - “No. of employees”

Also, Creatio populates phone, web, and social network links in the **Communication options** component and addresses (Country, State, City, Street, Zip code) in the **Address** expanded list.



Creatio
Search...
Close

Sales

Search app...

- Home
- Dashboards
- Calendar
- Tasks
- Feed
- Leads
- Accounts
- Contacts
- Opportunities
- Orders
- Contracts
- Invoices
- Documents

← Creatio
Close

➤ Add tag
Feed
Attachments

Creatio
1:11 PM - United States

Owner
Mike

Primary contact
Select primary contact

Type
Our company

Category

Industry
IT companies

Web - primary
creatio.com

Phone - primary
+16177657997

Facebook - primary
<https://www.facebook.com/C...>

Twitter - primary
<https://www.twitter.com/Cre...>

LinkedIn - primary
<http://www.linkedin.com/co...>

+ Add communication option

Last enrichment from Apollo.io
1/8/2024

Enrich from Apollo.io

ACCOUNT INFO
TIMELINE
SERVICE
SALES

Also known as Enter other name

Annual revenue **31 million or more**

Business entity Select entity

No. of employees **501-1000**

Addresses + ↻ 🔍

Address type	Full address	Primary
1	02109-2100, United States, Massachusetts, Boston, 53 State St	<input checked="" type="checkbox"/>

Banking details + ↻ 🔍

Name	Banking details
+ New	

Contacts + ↻ 🔍 Import contacts

Full name	Full job title	Mobile phone	Email	Address
1 Jenny Beer	Head of Presales, Ameri...	+16177557001	Jenny.beer@demo.com	

The account has been successfully enriched with data from Apollo.io. ✕

Contact enrichment

Note. You can enrich a contact record only if you connect a Apollo.io account to Creatio.

Field mapping between Apollo.io and Creatio is non-editable.

1. Go to the **Contacts** section → open the relevant record.
2. Click “Enrich from Apollo.io.”

The screenshot shows the Creatio interface for a contact record. The left sidebar contains a navigation menu with options like Home, Dashboards, Calendar, Tasks, Feed, Leads, Accounts, Contacts, Opportunities, Orders, Contracts, Invoices, and Documents. The main content area displays the contact details for Alice Phillips, including her account information (Axiom), job title (Managing Partner), and various contact methods (Email, Mobile phone, Business phone, Extension phone). A yellow button labeled "Enrich from Apollo.io" is visible in the left sidebar, indicating the next step in the process.

The screenshot shows the same contact record for Alice Phillips, but with a confirmation dialog box overlaid in the center. The dialog box contains the text: "Do you wish to continue? We're about to enrich the contact with data from Apollo.io. Do you want to proceed?" and two buttons: "No" and "Yes". The "Yes" button is highlighted in blue, indicating it is the selected option.

As a result, Creatio will populate the following fields:

- "Full name" ("First name" and "Last name")
- "Full job title"
- "Recipient's name"
- "Job function"
- "Department"
- "Management level"

Also, Creatio populates phone, email, and social network links in the **Communication options** component and addresses (Country, State, City, Street, Zip code) in the **Address** expanded list.

Note. Field mapping between Apollo.io and Creatio is non-editable.

The app searches for matching contacts by ApolloPersonId (contact ID from Apollo.io). If ApolloPersonId is not populated, the following rules are used, from higher to lower priority:

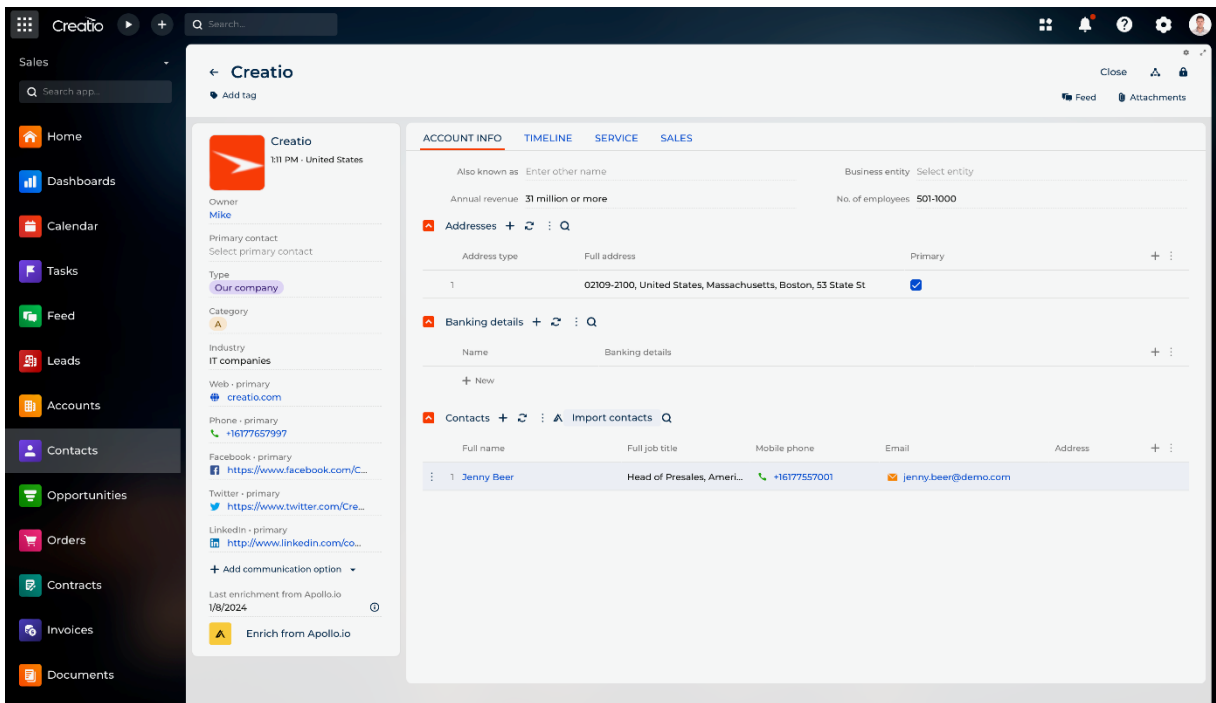
1. by email
2. by full name (first and last name) and CompanyId (account ID from Apollo.io)

Manage the procedure in the "Apollo search rules" lookup.

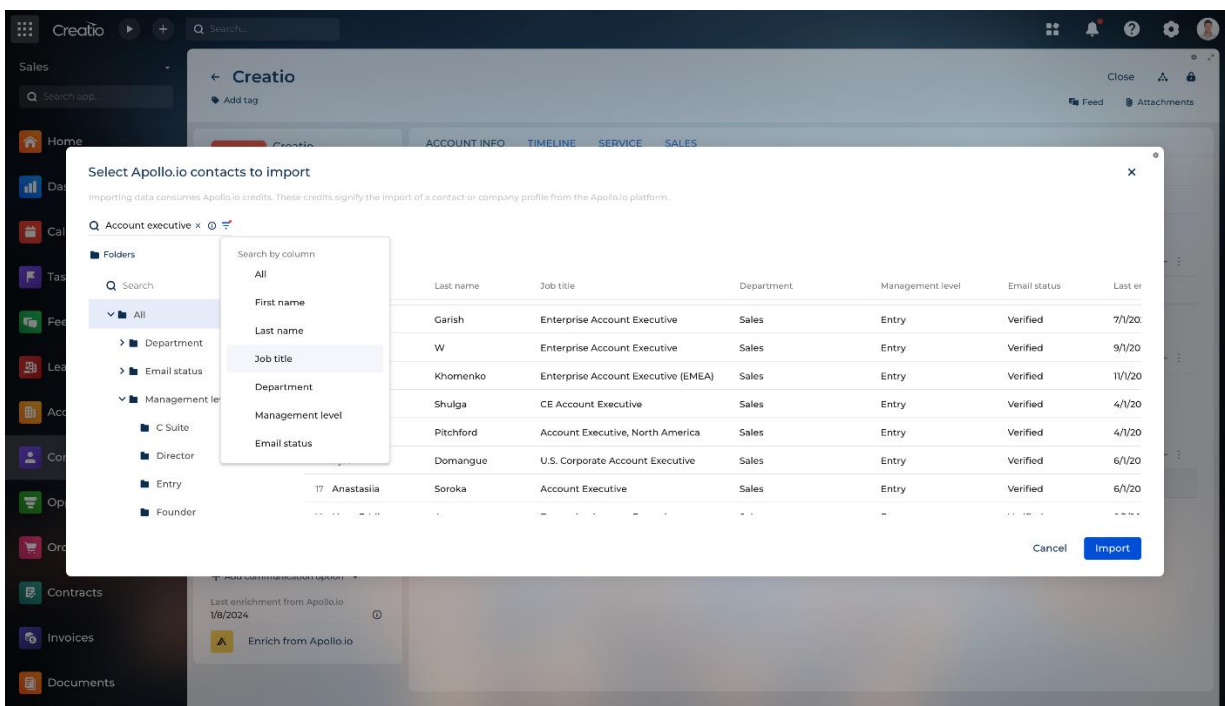
Import contacts from Apollo.io

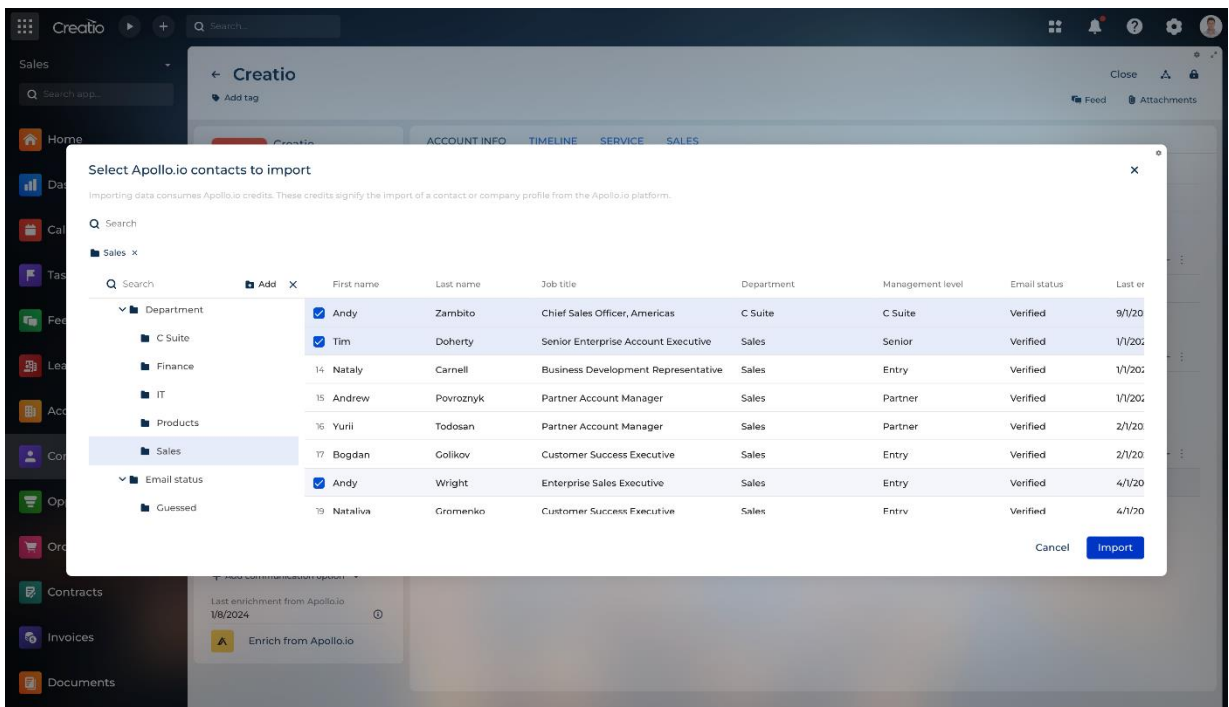
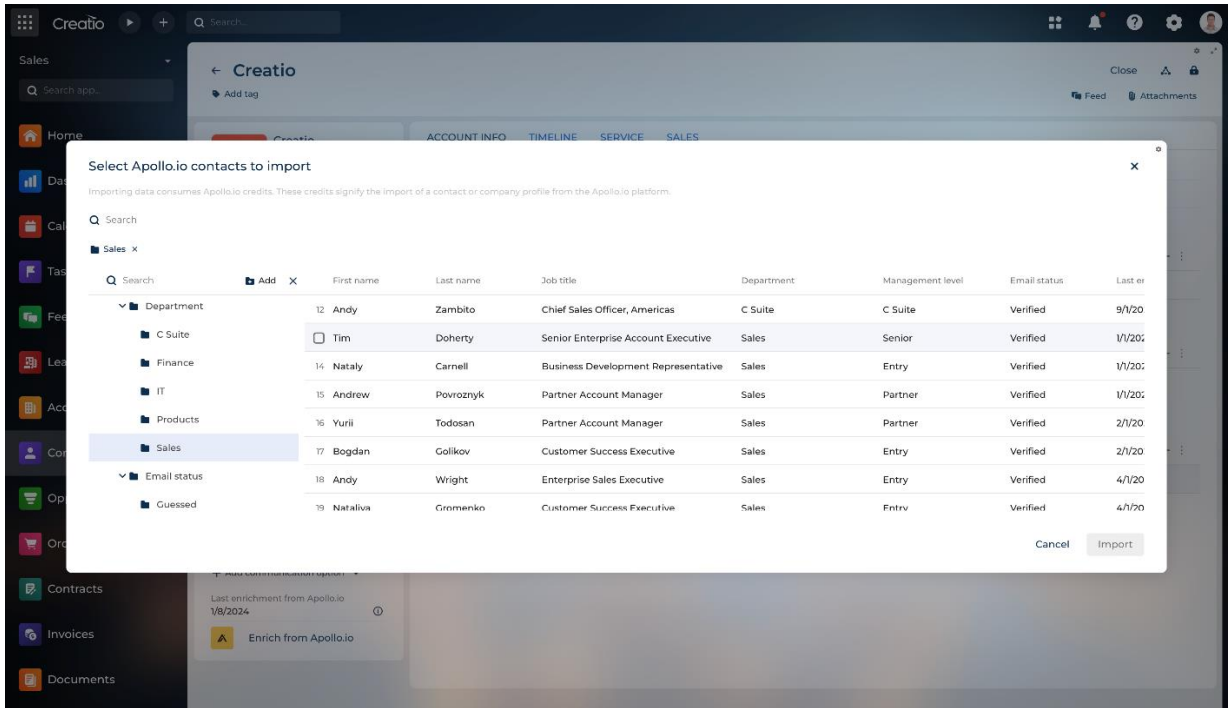
After you enrich an account record, you can import contacts connected to that account to Creatio. To do this:

1. Go to the **Accounts** section → open the relevant record.
2. Click “Import contacts” on the **Contacts** expanded list. This opens a mini page.



3. Select one or more contacts to import → “Import.”





Creatio searches for existing contact records that are similar to imported contacts by Apollo.io PersonId or full name (first name + last name). If one or more such record is found, the oldest found records is enriched based on the procedure set in the "Overwrite existing data with data from Apollo.io" ("MrktOverwriteWithDataFromApollo.io code") system setting. Otherwise, Creatio adds a new record and populates it using Apollo.io data.