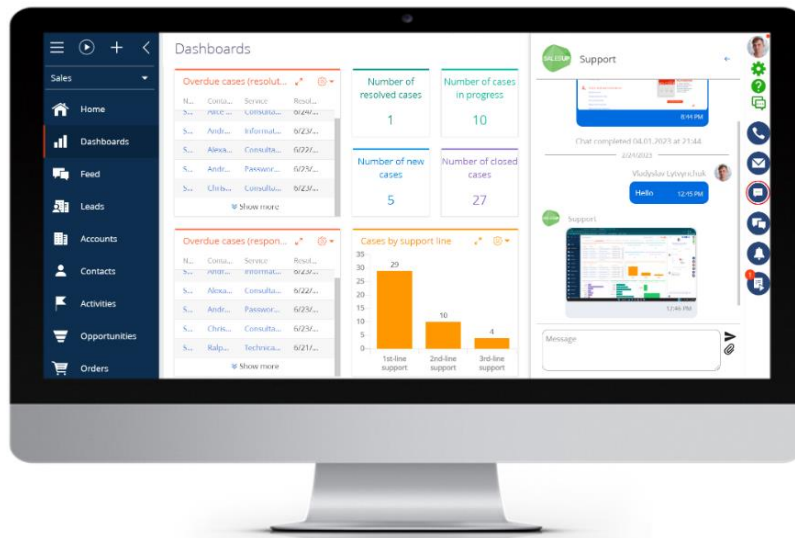




INTERNAL CHATS FOR CREATIO



Guide to setup and utilization

28.02.2023

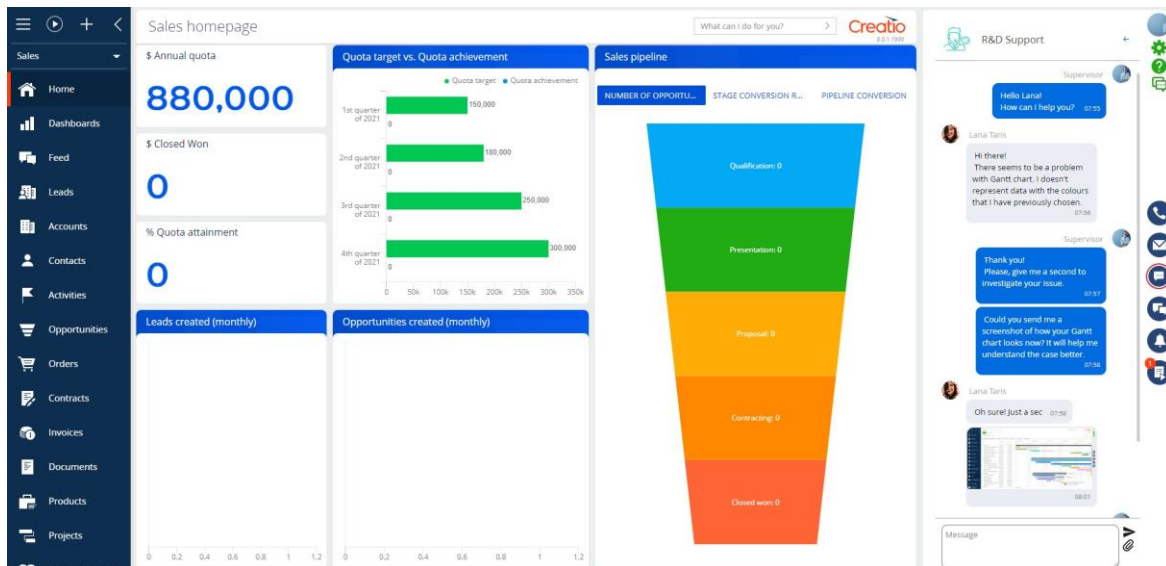
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Product description

The functionality of chats in Creatio allows you to communicate with customers and process requests via communication channels convenient for them in real-time. Employees of the company can write to the client in any communication channel convenient for them from the action bar of any section. And incoming requests are processed by chat operators in the communication panel. During the conversation, the operator can advise clients, share files and launch business processes directly from the Creatio communication panel. The entire interaction history is saved on the contact page. ([Work with chats | Creatio Academy](#))

The **Internal chat for Creatio** product is a solution that allows you to use the chat functionality within the Creatio system. The add-on makes it possible to send requests to users of the main system (employees) and users of the portal. The module simplifies communication between company employees by combining in one system (Creatio), in addition to work, also communication without the usage of additional messengers.



The product can be used by companies in any industry or business area, as it offers a unique setting for chats and their use cases.

Users of the system can choose different channels of communication within the system to send their request. You can exchange text information, files and images.

Use cases

- Work of support and processing of requests within the company;
- Instant communication between different departments of the company;
- Communication with portal users (customers or employees) without using additional channels;
- An additional channel for sending information to users of the system.

Key features

- A separate communication module for portal users and company employees;
- Ability to communicate without using external channels and process requests in real time;
- Ability to communicate with users of the main system and users of the portal in personal and groupchats;
- The ability to link chat to the records of the section;
- Setting up an unlimited number of internal communication channels and chats;
- Transfer by a client or employee of various types of information: text, file, image;
- Processing of incoming internal requests by operators in the communication panel;
- Possibility for the chat operator to write to the client or view the history from the action panel of anysection;
- Display of internal chats in the chronology of related sections;

When working with internal channels, the following standard chat functionality is supported:

- Separate processing of messages from different channels by different operators;
- Setting up messaging processes;
- Various algorithms for accepting a chat into work by an operator;
- Saving the history of interaction with clients in a separate section and on the chat page;
- When communicating with the client again, there is access to past correspondence in the chat, which allows you to better understand the client's request;
- When working with requests, display the correspondence in the process of processing the request;
- Ability to customize response templates for faster response to requests.

Notes and restrictions

The server, on which the site is located, must be able to access the site by name.

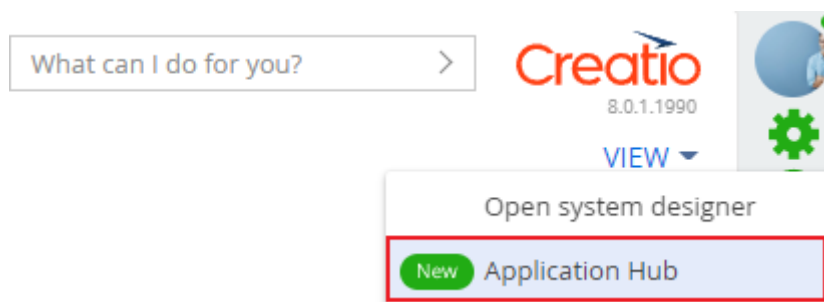
Technical requirements

The product is compatible with all products on the Creatio platform version 7.18.2 and higher.

Product installation and setup

Product installation

To install packages, press this  button and go to «Application Hub».



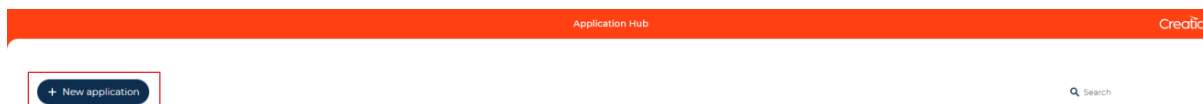
Or go to «System Designer» and select «Application Hub».



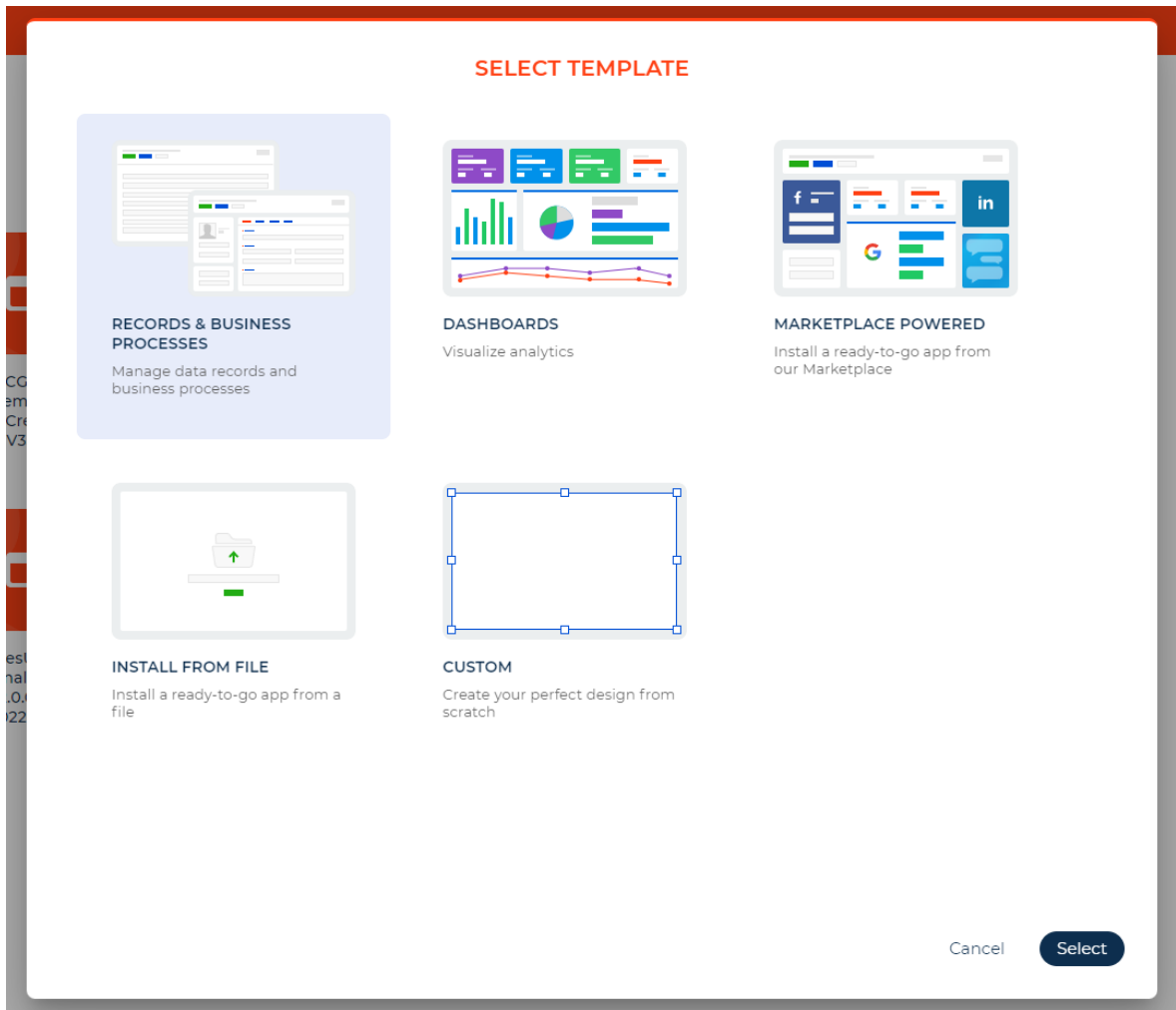
Application management

[Application Hub](#) New

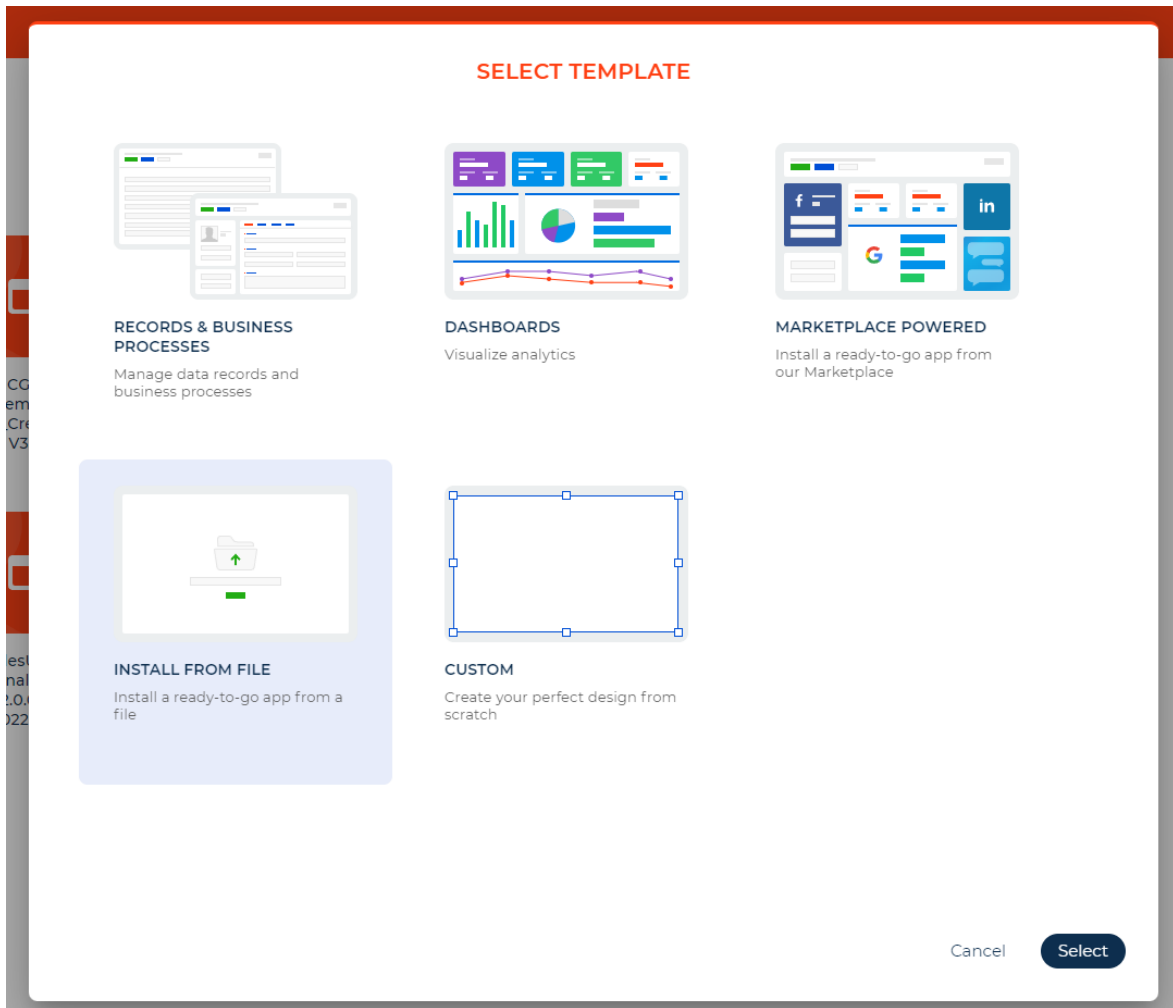
On the «Application Hub» page, click «New App».



Select the «Install from Marketplace» block and click the «Select» button.



If you install a product package from a file, you must request an up-to-date package from Sales'Up support. Next, on the «App Center» page, click «New Application» and select «Install from file», specify the path to the archive with the package and complete the installation.



General settings

The standard setup of chat channels is described at the academy [Creatio Academy | Improve your skills with Creatio Training Courses & Certification.](#)

How to set up chat processing:
[Set up chat | Creatio Academy.](#)

Additional settings

In the «Internal chat default member role» system setting, the user can specify the role that will be automatically assigned to the chat member:

Internal chat default member role What can I do for you? > **Creatio**
8.0.1.1990

CLOSE

Name* Internal chat default member role Code* SulInternalChatDefaultMemberRole

Type* Integer Cached

Default value: 3 Save value for current user

Description: 2 - Admin
3 - Member
4 - Subscriber

Access for reading for internal users ⓘ

Allow for all

Restrict for all

Allow by operation

Access for modification for internal users ⓘ

Allow for all

Restrict for all

Allow by operation

Access for portal users

Allow reading for portal users

In the «Internal chat default member role» system setting, the user can change the sound of the incoming chat message.

Internal chat message notification sound What can I do for you? > **Creatio**
8.0.1.1990

CLOSE

Name* Internal chat message notification sound Code* SulInternalChatMessageNotificationSound

Type* BLOB Cached

CLEAR VALUE Save value for current user

Description

Access for reading for internal users ⓘ

Allow for all

Restrict for all

Allow by operation

Access for modification for internal users ⓘ

Allow for all

Restrict for all

Allow by operation

Access for portal users

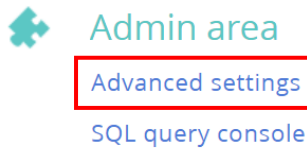
Allow reading for portal users

Linking chats to system sections

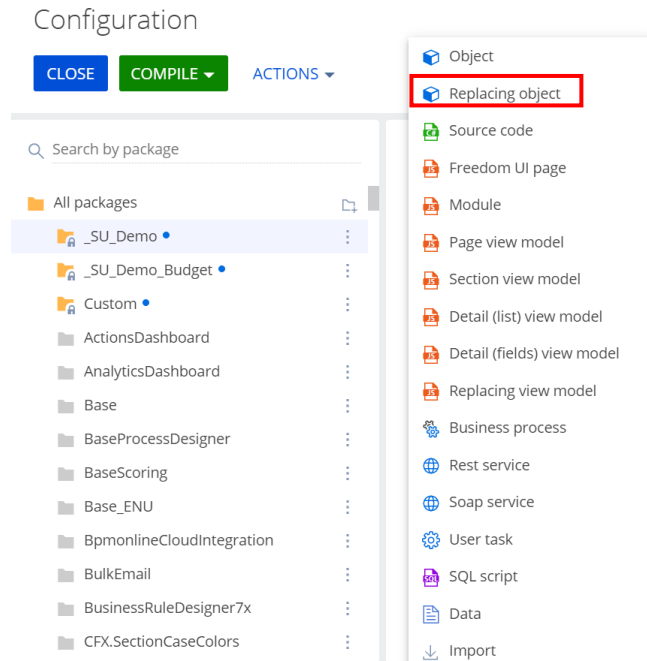
In order to link chats to system's sections, it is necessary to create a replacing object for the SulInternalChat object by adding columns (links) to those objects, which need to be linked to chats.

To create a replacing object:

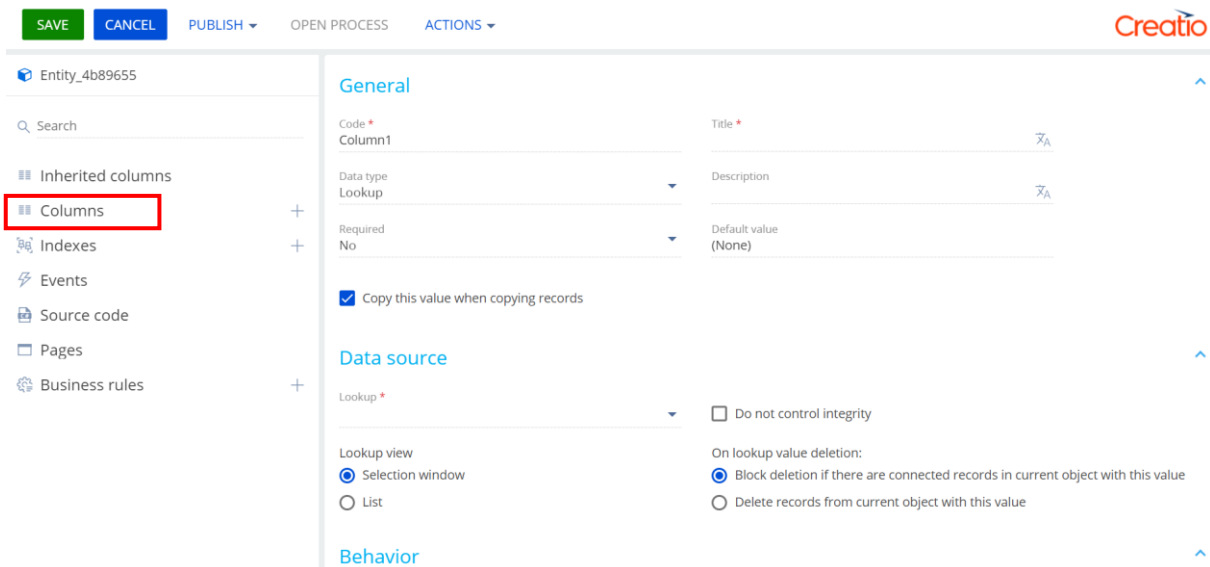
1. Go to advanced settings in the system designer.



2. Choose the package, in which a replacing object is created (e.g. «Custom» package); press the «Add» button and choose the «Replacing object» option;



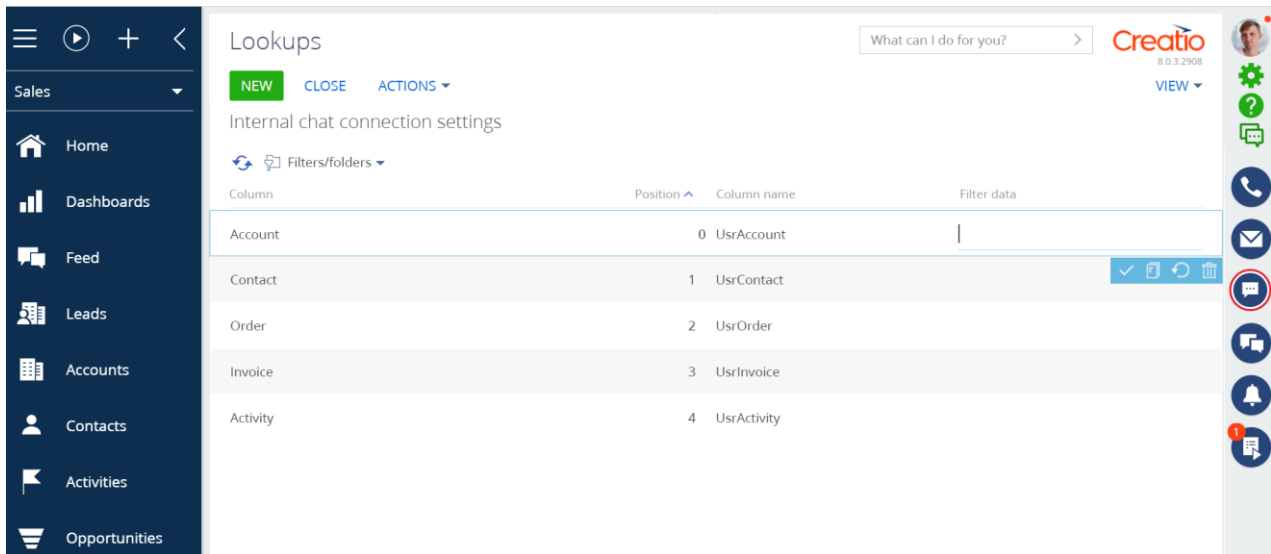
3. In the SulInternalChat object, add columns (links) to those objects, which need to be linked to chats.



After the replacing object is added, it is necessary to set up the link between columns in the «Internal chat connection settings» lookup.

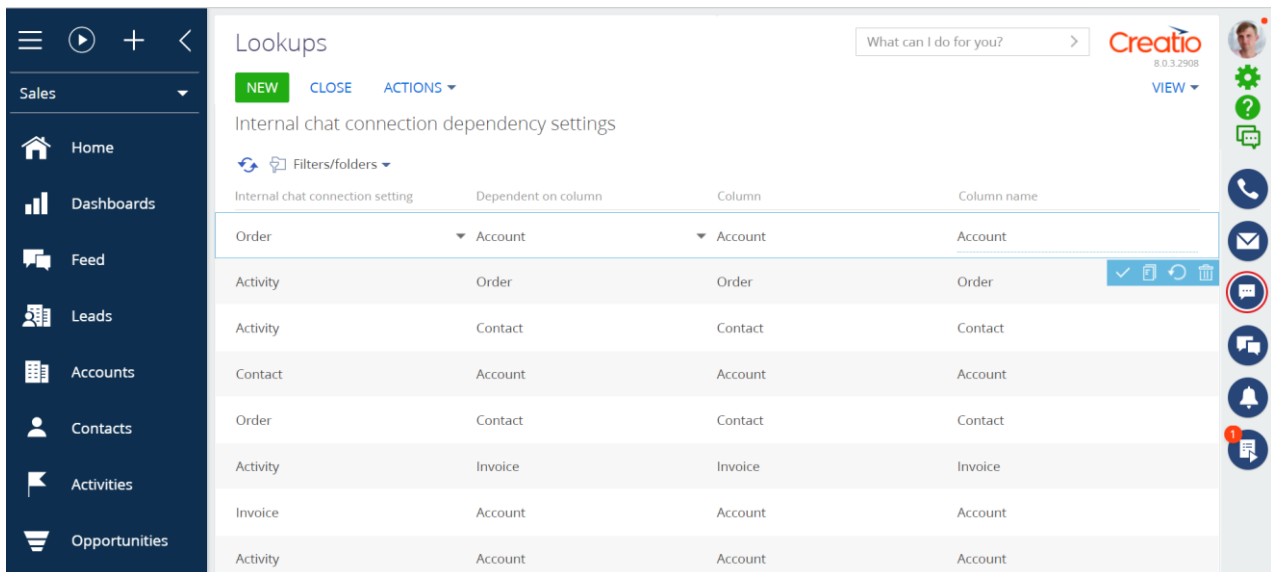
1. Go to the «Lookups» section in the system designer.

- In the «Internal chat connection settings» lookup, add columns' names, which were earlier added to the replacing object.



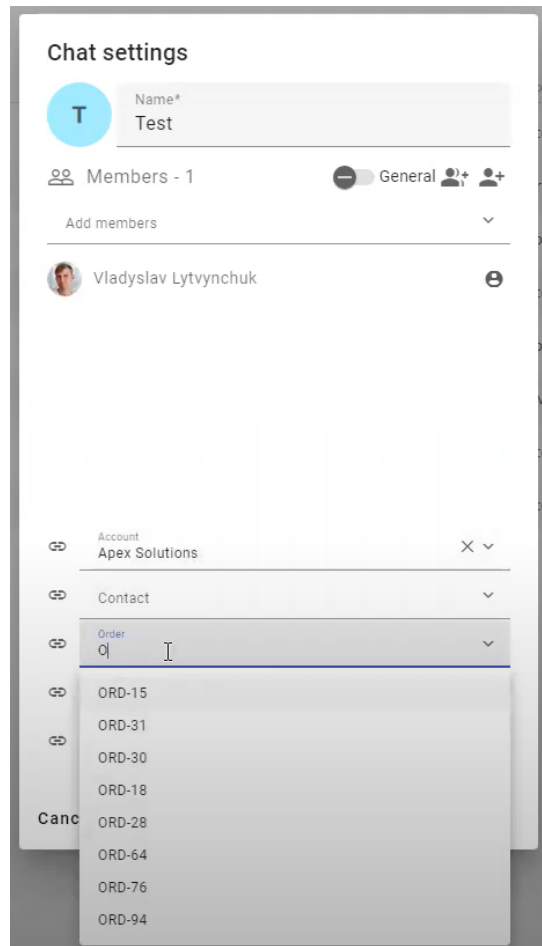
Addition: In the «Position» column, a display order of the connection in a group chat settings is specified. Change the position in this lookup, when it is needed to change a display order of the connection in a group chat settings.

User can set the dependency for connection columns by adding it in the «Internal chat connection dependency settings» lookup.



This way, after the dependency setup, filtration is automatically applied when connection between objects is added.

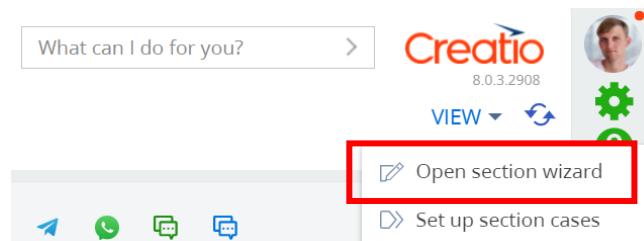
For example: When linking chat to an account and order, after the account selection, there are only those orders available, account of which is account chosen for the connection.



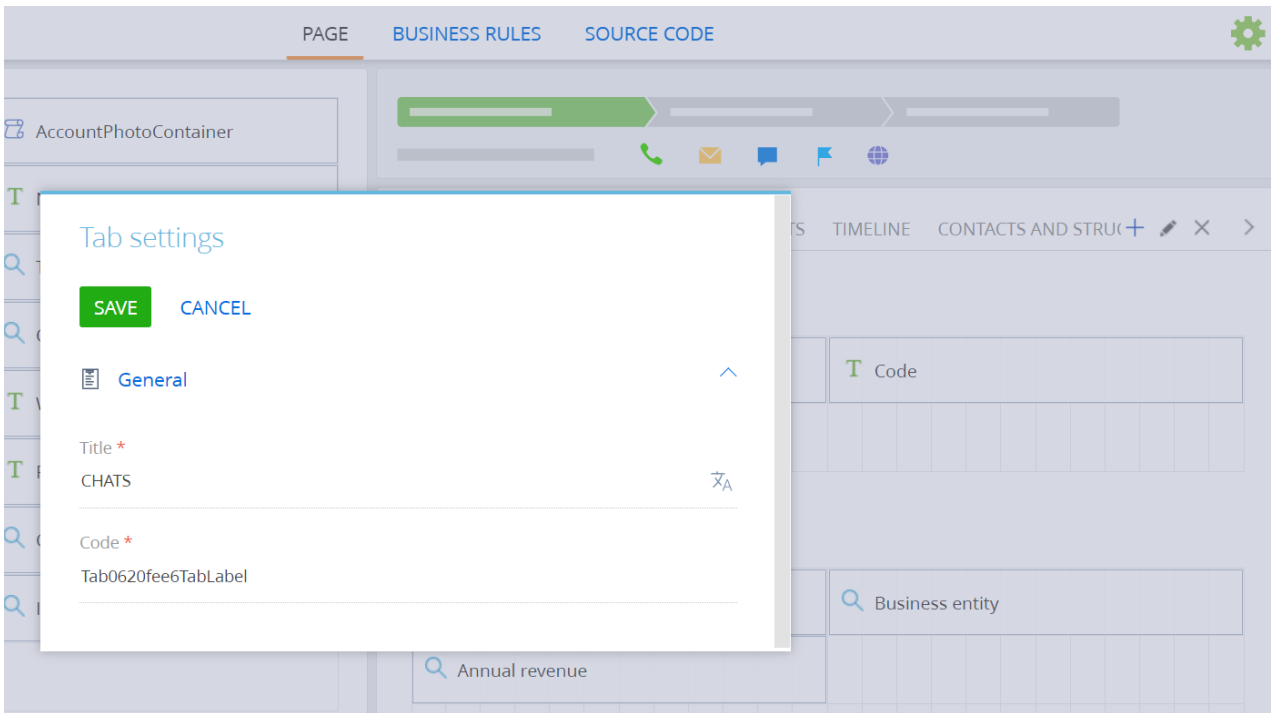
Adding «Internal chats» detail to display chat's linkage to objects

By default, after adding the connection to the object, there is no detail with the connection displayed on the page. For the display of this connection:

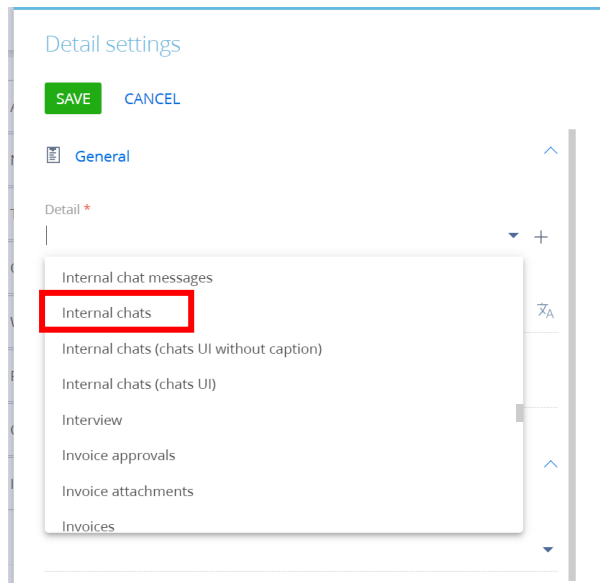
1. Open section wizard on the linked object page;



2. Add the «CHATS» tab;



3. On the «CHATS» tab, add the «Internal chats» detail.



4. Save changes and clear cache.

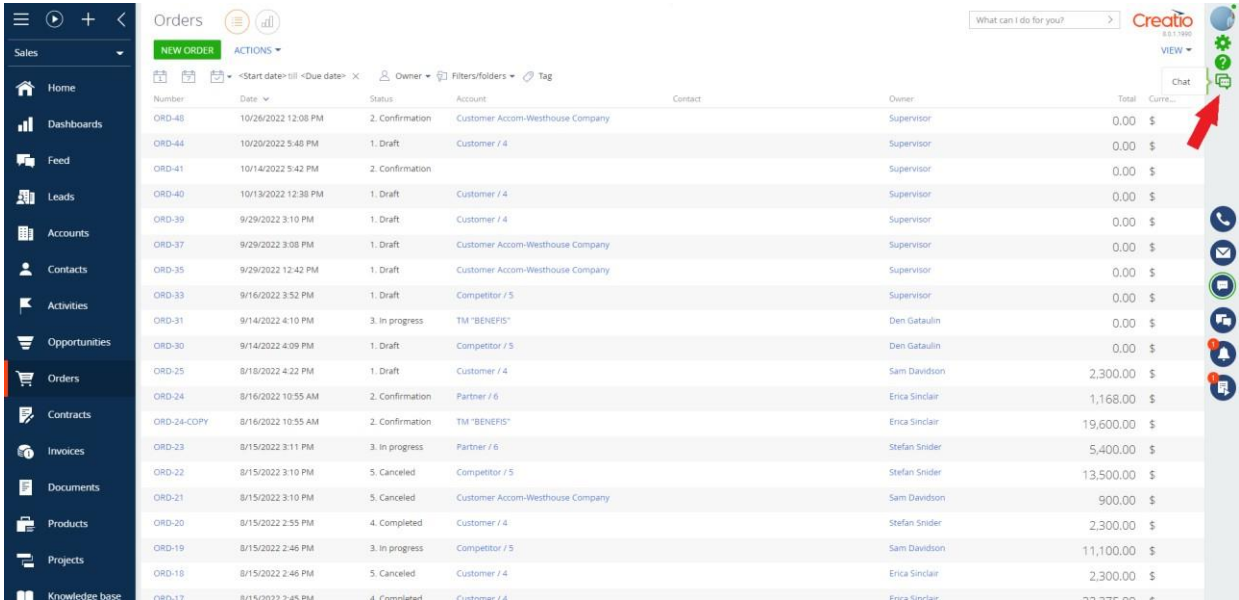
As a result, «Internal chats» detail will be added to the «CHATS» tab of the linked object.



Product utilization

User experience with chats

Users have a new Chat icon, which after clicking on it, opens a chat on the configured channel in the right panel.

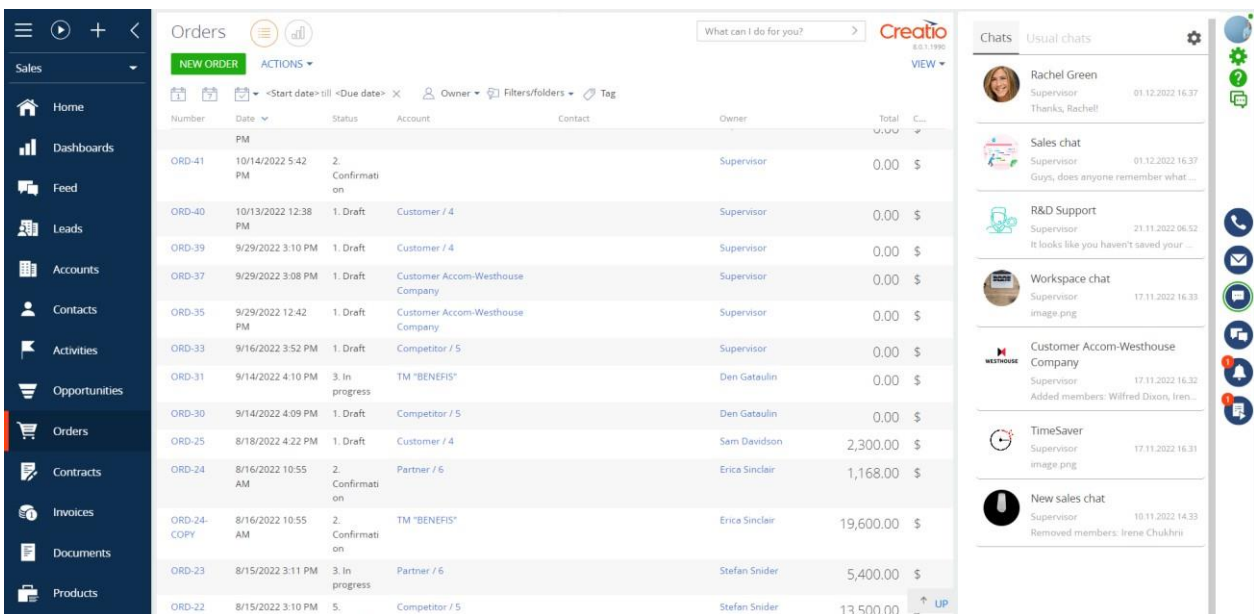



There are «Chats» and «Usual chats» tabs available for the users.

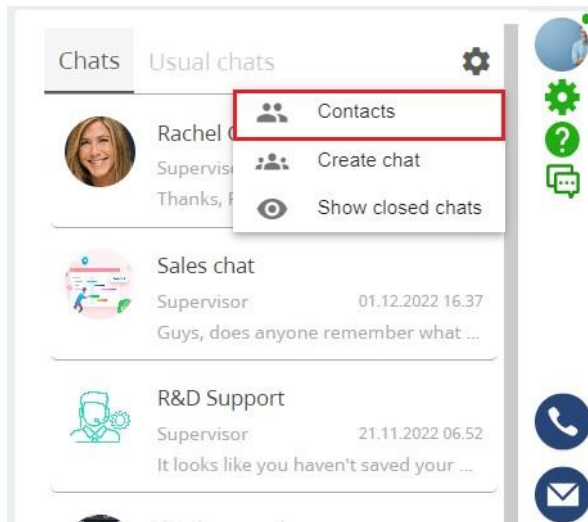
Personal chat setup



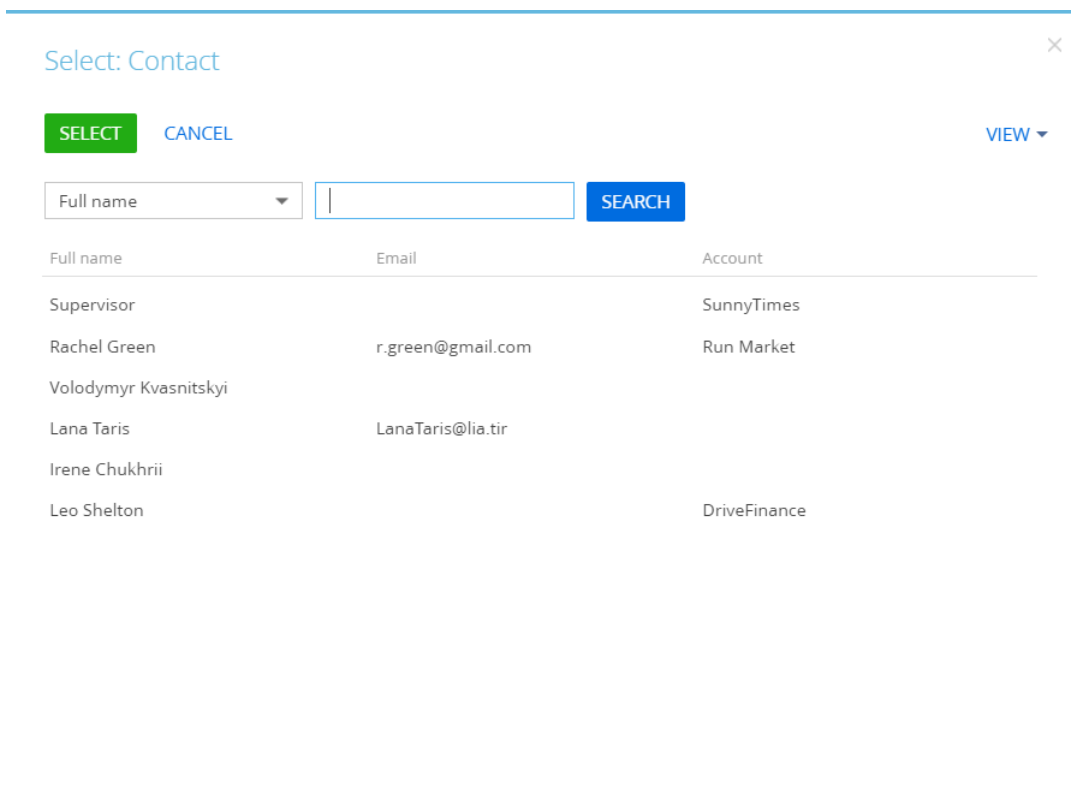
To set up a personal chat for internal communication, text, files and images exchange, go to chats



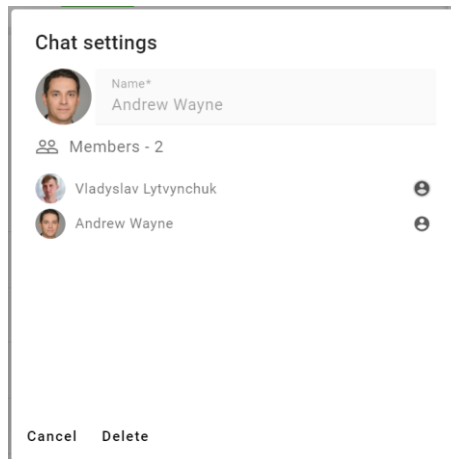
To add a personal chat, click this  button on the «Chats» tab and select the «Contacts» action.



In the list of contacts that opens, contacts with a user in the system (main system and portal) will be available for selection. Select the contact you want to create a private chat with and click the «Select» button.

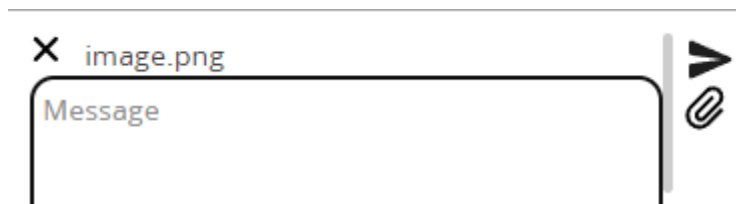


In the modal window that opens, click the «Save» button.



Note!

For the convenience of exchanging files and images (for example, screenshots), the ability to use the key combination «Ctrl + C» and «Ctrl + V» has been added. Thus, the copied screenshot cannot be saved to a separate file, but added using the key combination «Ctrl + V» in the chat text input block.



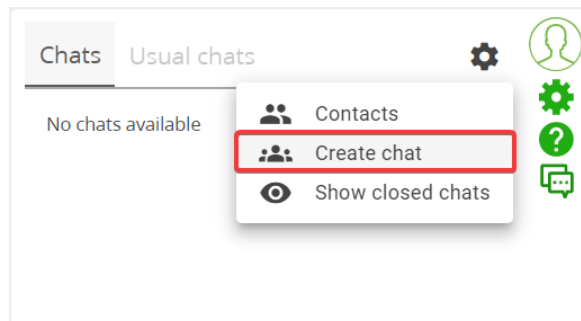
Group chat setup



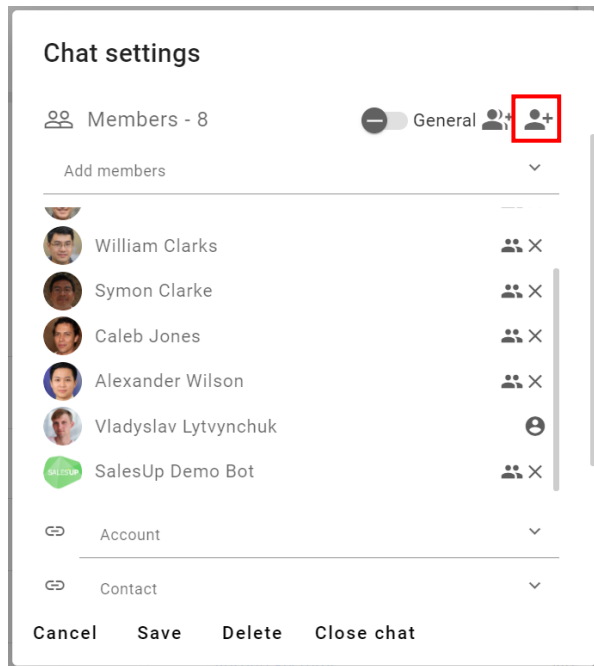
To set up a group chat for internal communication, text messages, files, and image, go to chats



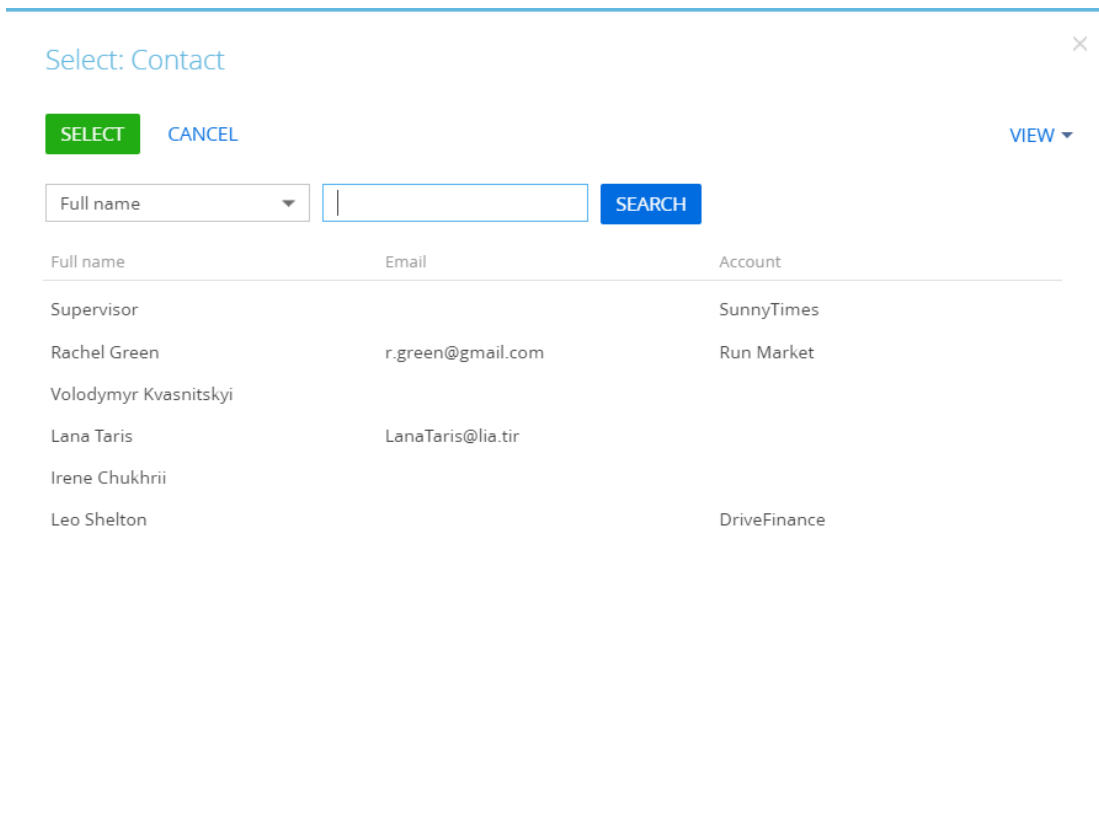
To add a group chat, click the button on the Chats tab and select the Create Chat action.



The user can add a contact or a role (group) to the chat. When adding a contact,

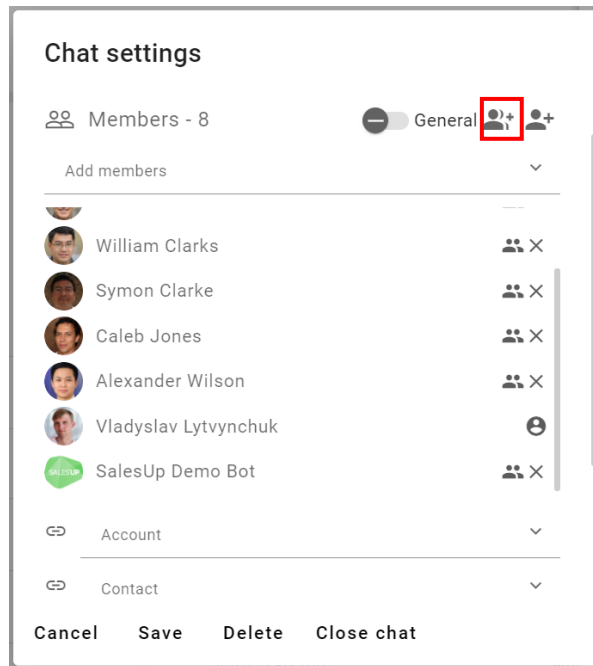


Contacts that have a user in the system (main system and portal) will be available for selection. Select the contact you want to create a private chat with and click the «Select» button.

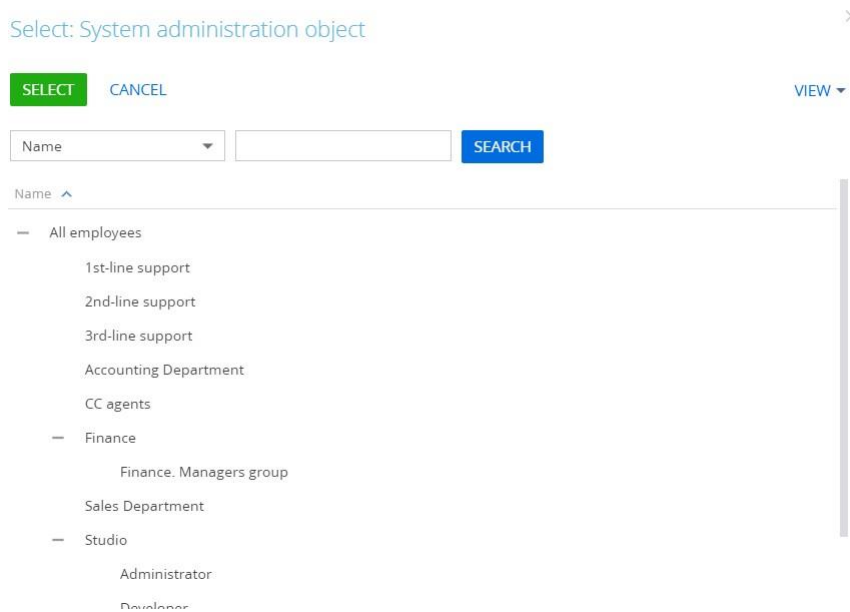


In the modal window that opens, specify the name of the chat and click «Save».

If the user needs to add a group of participants included in the role, after selecting the role, all users included in it will be added to the chat.

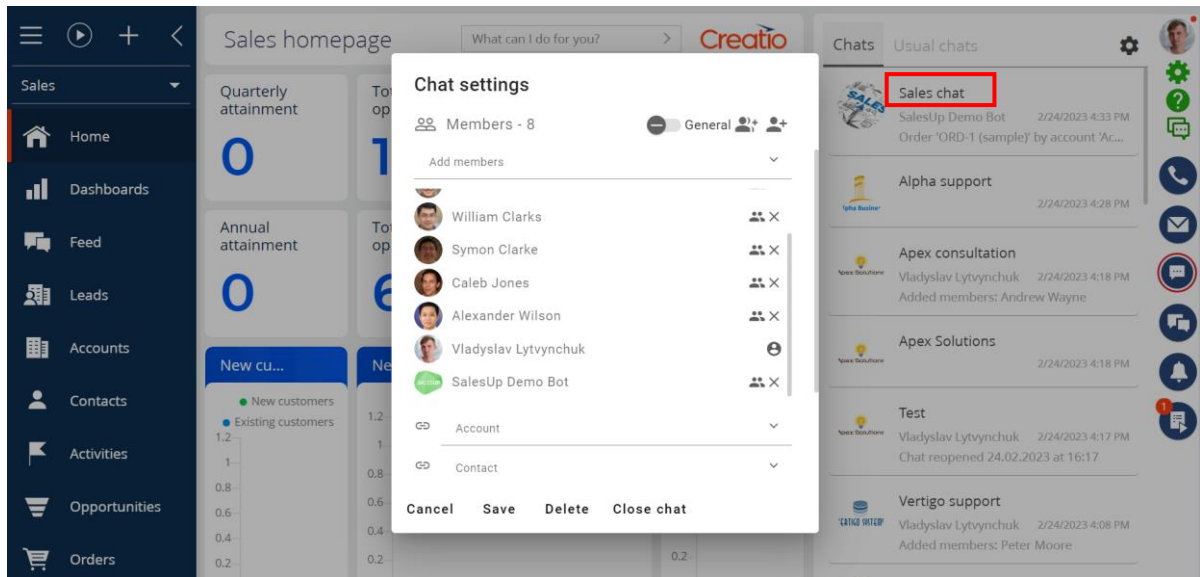


After adding the role, you must click the «Save» button.

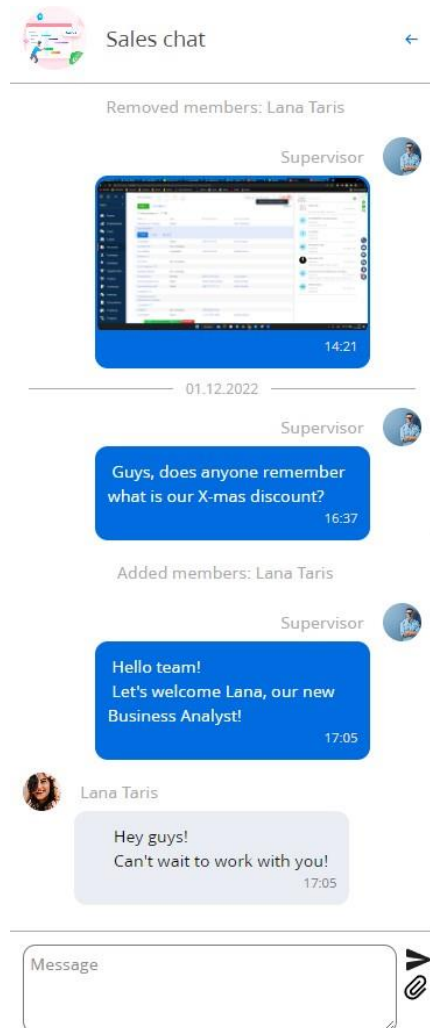


With a single click in the area of the icon or the name of the chat, the chat creator can make changes, namely:

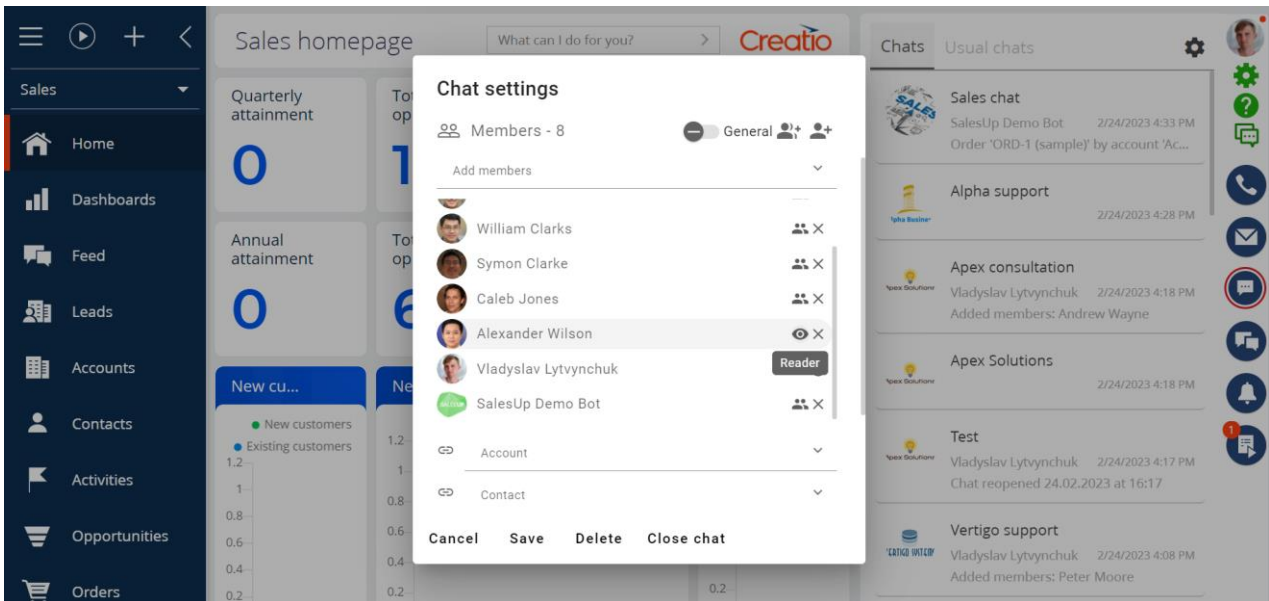
- Change the name of the chat;
- Add and remove chat users;
- Close chat.



After adding or removing a chat participant, other chat participants will be informed about it.



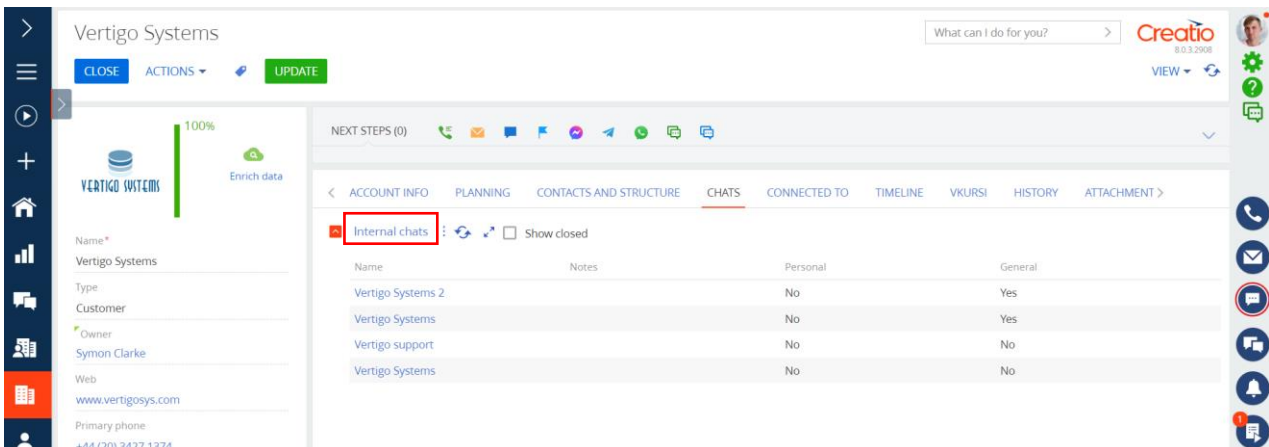
In the chat settings, the administrator can change the participant's role in the chat from «Participant» to «Viewer» or «Administrator».



Access to chats through linked objects

In order to have a quick transition to chats, there is a possibility to go to a chat or view the information on a chat from the linked object.

For example: If a chat is linked to an account, records from all chats related to this account are displayed on the account's page (tab «Chats») on the «Internal chats» detail.



Double-click on the detail's record makes messages from the chat display on the opened page. In addition, users can leave a message from this view, which will be synchronized with the chat in the main view.

Vertigo Systems 2

CLOSE ACTIONS ▾

The screenshot shows a chat window for 'Vertigo Systems 2'. On the left, there is a sidebar with fields: Name (Vertigo Systems 2), Status (Active), Personal (checkbox), General (checkbox), and Last activity (1/4/2023 8:44 PM). The main chat area has a header with 'NEXT STEPS (0)' and various communication icons. Below that, there are tabs for 'MESSAGES', 'ATTACHMENTS AND NOTES', and 'FEED'. The chat content shows a message from 'Vladyslav Lytvynchuk' on 1/4/2023, which is a screenshot of a system interface with a red arrow pointing to a specific element.

Moreover, on the «Timeline» tab all actions and messages of the chat, which is linked to an object, will appear by clicking «Show chat».

The screenshot shows a CRM record for 'Vertigo Systems'. The left sidebar contains a navigation menu and a 'VERTIGO SYSTEMS' card with a 100% progress indicator. The main area has tabs for 'ACCOUNT INFO', 'PLANNING', 'CONTACTS AND STRUCTURE', 'CHATS', 'CONNECTED TO', 'TIMELINE', 'VKURSI', 'HISTORY', and 'ATTACHMENT'. The 'TIMELINE' tab is active and shows a list of chat messages. The first message is from 'Vertigo support' with status 'Active', last activity on Fr 2/24/2023 4:08 PM, and a 'Show chat' link. The second message is from 'Vertigo Systems' with status 'Active', last activity on Fr 2/24/2023 9:48 AM, and a 'Show chat' link. The right sidebar contains a search bar, a 'Creatio 8.0.3.2908' logo, and various utility icons.

Additional features

There are new available icons on the «Next steps» panel of a record to send messages to a user or group from any section.

By clicking the blue icon internal general chat with a contact opens on behalf of the administrator.

William Walker

What can I do for you? **Creatio** 8.0.3.2908

CLOSE ACTIONS

100% 9:38 PM, London

Full name* William Walker
Full job title System Administrator
Mobile phone +44 782 274 8352
Business phone 3250
Email william.walker.work@gmail.com

Account Our company SalesUp Demo
Type Our company

NEXT STEPS (0)

You don't have any tasks yet
Press **+** above to add a task

CONTACT INFO CONNECTED TO MAINTENANCE TIMELINE ENGAGEMENT

Type Employee Owner Megan Lewis
Title Mr. Gender Male
Recipient's name Walker Preferred language
Age 46

Communication options + + +

Business phone 3250 Mobile phone +44 782 274 8352
Email william.walker.work_ Extension phone 103
Do not use SMS

Addresses + : : :

William Walker
Our company SalesUp Demo

Pre-chat summary Show more

William Walker
Hi 04:16 PM

Vladyslav Lytvynchuk
Hello, William Walker! My name is Vladyslav Lytvynchuk. How can I help you? 04:19 PM

Chat completed 12/8/2022 at 05:19 PM

William Walker
Hello there 01:57 PM

Vladyslav Lytvynchuk
What is your the request? 01:58 PM

Chat completed 2/16/2023 at 01:58 PM

William Walker

William Walker

What can I do for you? **Creatio** 8.0.3.2908

CLOSE ACTIONS

100% 9:38 PM, London

Full name* William Walker
Full job title System Administrator
Mobile phone +44 782 274 8352
Business phone 3250
Email william.walker.work@gmail.com

Account Our company SalesUp Demo
Type Our company
Owner

NEXT STEPS (0)

You don't have any tasks yet
Press **+** above to add a task

CONTACT INFO CONNECTED TO MAINTENANCE TIMELINE ENGAGEMENT

Type Employee Owner Megan Lewis
Title Mr. Gender Male
Recipient's name Walker Preferred language
Age 46

Communication options + + +

Business phone 3250 Mobile phone +44 782 274 8352
Email william.walker.work_ Extension phone 103
Do not use SMS

Addresses + : : :

William Walker

Hi! 12:42 PM

Vladyslav Lytvynchuk
Hello! 12:45 PM

What is the status of the ORD-10 order? 12:45 PM

<https://boxes-new.salesup-it.com/Navigation/SuNavigation.aspx?Order=ORD-10> 12:45 PM

William Walker
It has already been completed. But we expect payment from the client. 12:46 PM

Vladyslav Lytvynchuk
I control it. Let me know when there is new information. 12:47 PM

Message

Our company SalesUp Demo

What can I do for you? **Creatio** 8.0.3.2908

CLOSE ACTIONS UPDATE

SALESUP 30% Enrich data

Name* Our company SalesUp Demo
Type Our company
Owner John Best
Web
Primary phone
Category

NEXT STEPS (2)

Work on the case
6/22/2022 | Peter Moore

ACCOUNT INFO CONTACTS AND STRUCTURE CONNECTIONS

Also known as

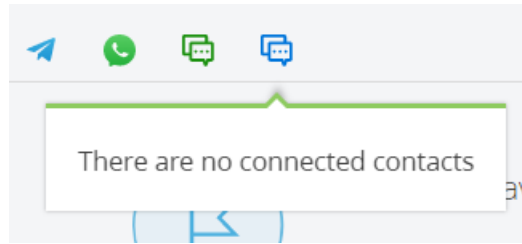
Communication options + + +

Supplier products + : : :

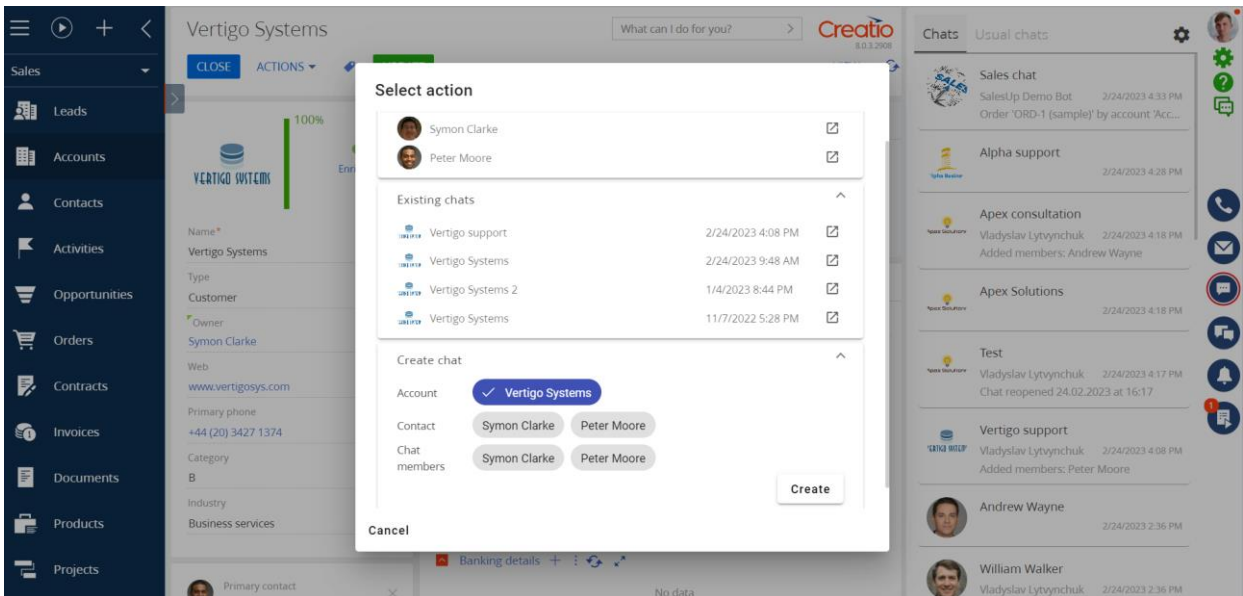
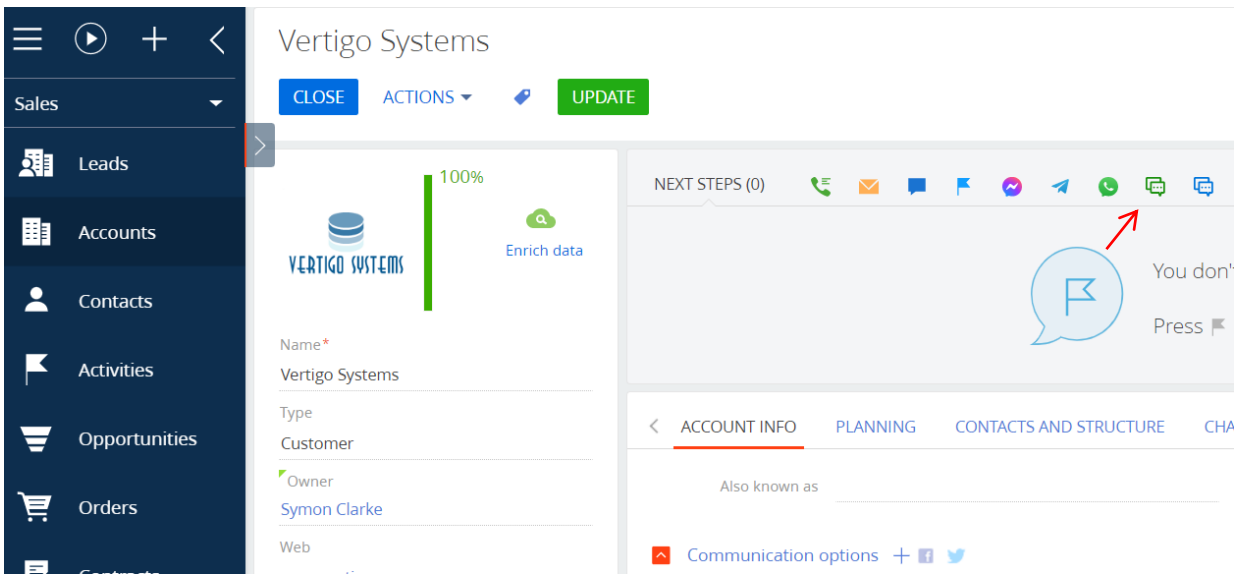
No data

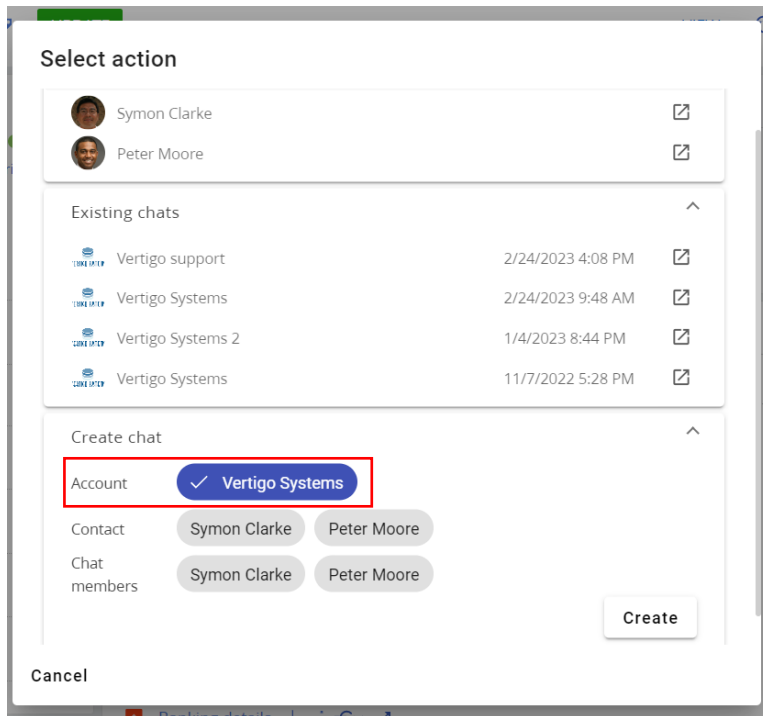
Mary King
MK Mary King
Peter Moore
Jason Robinson
William Walker
John Best
Symon Clarke

Important! If there are no previous messages from this user, the system will notify in case of the try to open a chat:



Click on the green icon opens a modal window, where the connection of the Object to chat is already set with a possibility for future actions available:

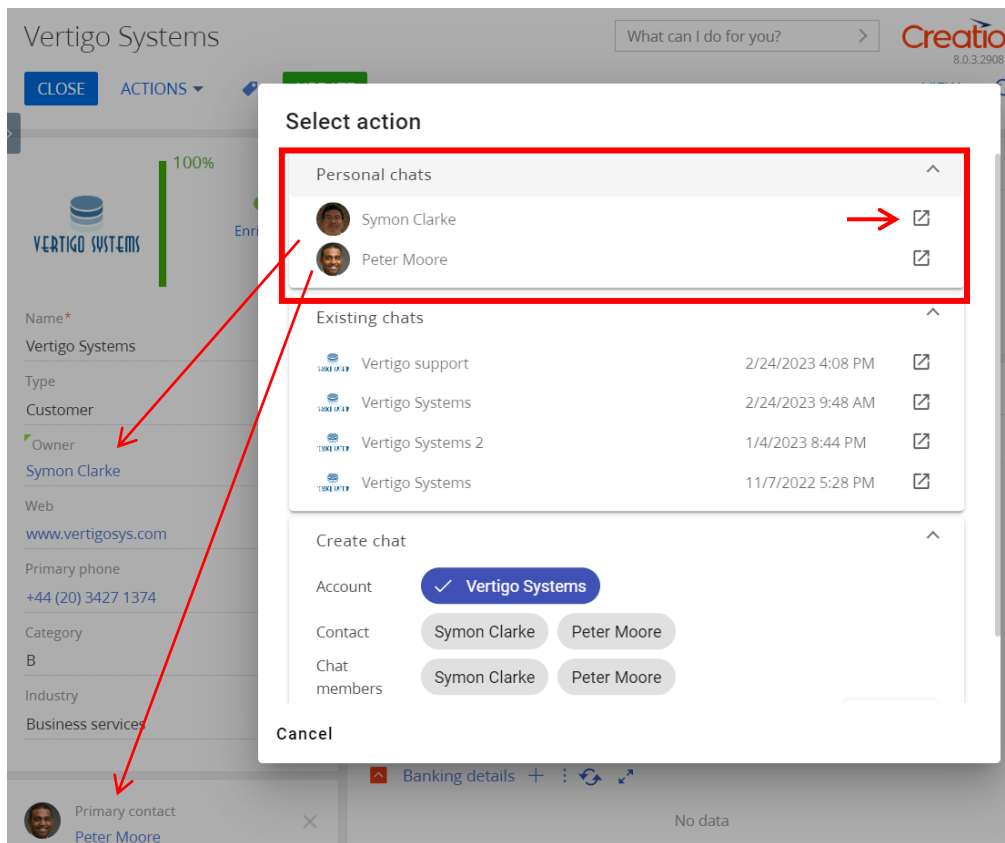




The transition to a new chat linked to an object; transition to existing chats linked to an object; transition to a personal chat with a user.

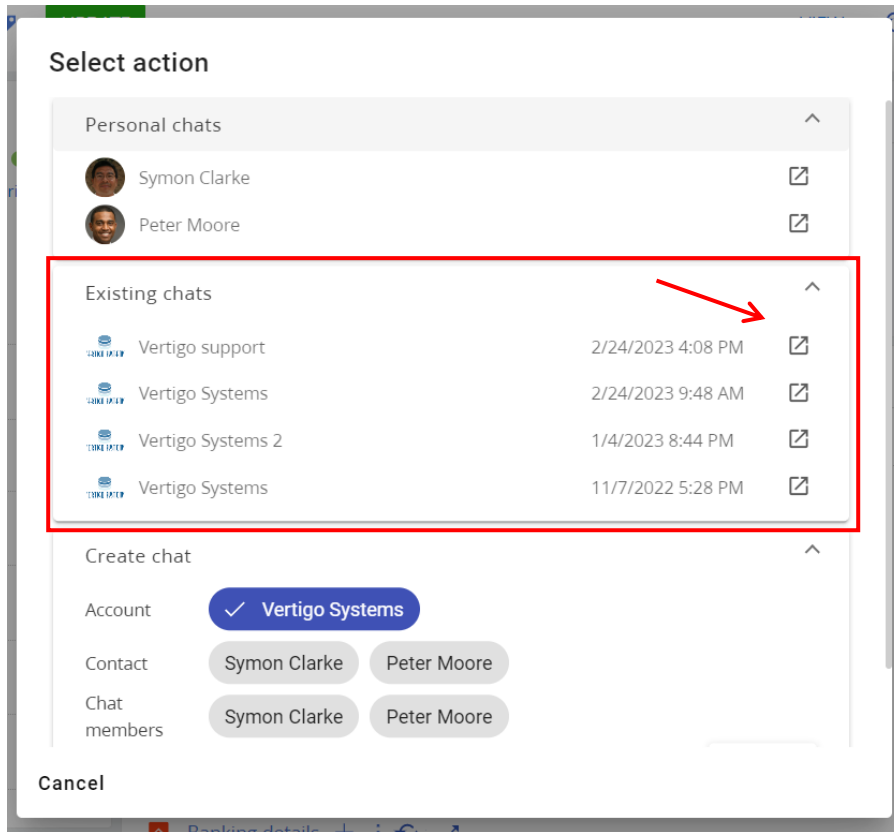
For example: When adding a new chat from the object «Account», in the opened modal window it is possible to quickly move to:

1. Personal chat with a contact, which is linked to an account;



- 2.

3. Existing chat, which is linked to an account;



4. New chat, which is linked to an account.

Internal communication channel setup

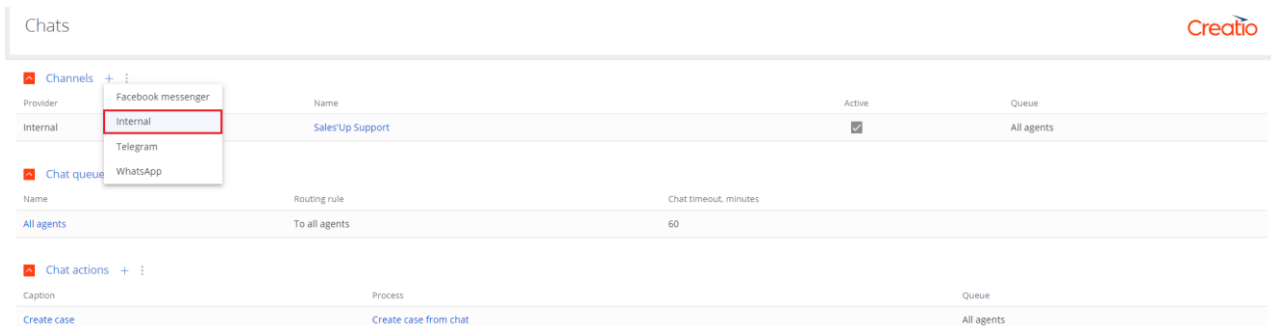
A new channel provider has been added to configure internal communication channels.

The setup is carried out similarly to other standard providers (Telegram, WhatsApp, Facebook).

Adding a channel

To add a new internal communication channel, you have to:

In the chat manager, similar to the standard logic described at the academy, add a channel with the «Internal» type.



On the page for adding/editing an internal communication channel, you must fill in all the required fields:

- *Name* – the title of the chat that will be displayed to users when sending requests and to operators when processing requests.
- *Active* – whether the channel is active or not. Only active channels are available to users.
- *Chat queue* – the queue in which calls received via this channel will be processed.
- *Language* – the language in which quick response templates will be generated when processing calls.
- *Image* – an image of the channel that users will see when they send requests.

Chat

Chat configuration form for 'Sales'Up Support' channel. The form includes the following fields and options:

- Name: Sales'Up Support
- Chat queue: All agents
- Language: English (United States)
- Is active channel:
- Buttons: APPLY, CANCEL

Chat

Chat configuration form with empty fields. The form includes the following fields and options:

- Name: (empty)
- Chat queue: (empty)
- Language: (empty)
- Is active channel:
- Buttons: APPLY, CANCEL

To save the new entry, click the «Apply» button.

Changing an existing channel

To change an existing channel, you have to:

In the chat manager, similar to the standard logic described at the academy, you need to click on the channel name.

Chats Creatio

Channels + :

| Provider | Name | Active | Queue |
|----------|------------------|-------------------------------------|------------|
| Internal | Sales'Up Support | <input checked="" type="checkbox"/> | All agents |

Chat queues + :

| Name | Routing rule | Chat timeout, minutes |
|------------|---------------|-----------------------|
| All agents | To all agents | 60 |

Chat actions + :

| Caption | Process | Queue |
|-------------|-----------------------|------------|
| Create case | Create case from chat | All agents |

Make changes on the record page that opens, apply the changes.

Deleting an existing channel

To delete an existing channel, you have to:

In the chat manager, similar to the standard logic described at the academy, you need to select the desired channel and select the Delete item in the actions.

Chats Creatio

Channels + ⋮

| Provider | Name | Active | Queue |
|----------|-----------------|-------------------------------------|------------|
| Internal | SalesUp Support | <input checked="" type="checkbox"/> | All agents |

Chat queues +

| Name | Routing rule | Chat timeout, minutes |
|------------|---------------|-----------------------|
| All agents | To all agents | 60 |

Chat actions + ⋮

| Caption | Process | Queue |
|-------------|-----------------------|------------|
| Create case | Create case from chat | All agents |

Customizing rights on the channel

To set up personal rights for every communication channel, you have to:

Enable record-based administration for the Chat Channel object.

When access by records is enabled for the Chat channel object, the «Set permissions» button is available on the editing page. It works similarly to the standard write permission setting.

[Object operation permissions | Creatio Academy](#)

Chat object permissions Creatio

APPLY CANCEL ACTIONS ▾

Title: Chat
Name: OmniChat

Note

System operations "Add any data", "View any data", "Edit any data", "Delete any data" granted to roles or users have higher priority than permissions that you configure in this section.

PERMISSIONS **ADVANCED OPERATIONS**

Use operation permissions ⓘ

| Priority | User or role | Create | Read | Edit | Delete |
|----------|-----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| 0 | All employees | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 1 | 1st-line support | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 2 | Accounting Department | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

[+ Add](#)

Use record permissions ⓘ

Grant permissions based on the record author ⓘ

| Record author | User or role who obtains permissions | Read | Edit | Delete |
|---------------|--------------------------------------|-------------------------------------|--------------------------|--------------------------|
| All employees | All portal users | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| All employees | All employees | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

[+ Add](#)

Use column permissions ⓘ

Chat

Name: Sales'Up Support Is active channel

Chat queue: All agents ▾

Language: English (United States) ▾

APPLY CANCEL MANAGE RIGHTS

Access rights: Sales'Up Support

NEW ▾ SAVE CANCEL

| | | |
|--|------------------|------------------------------|
| | Read | |
| | All employees | Granted |
| | All portal users | Granted |
| | Supervisor | Granted/delegation permitted |
| | Edit | |
| | Supervisor | Granted/delegation permitted |
| | Delete | |
| | Supervisor | Granted/delegation permitted |

Channels setup for portal users

For omnichannel communication channels to work for portal users, you have to:

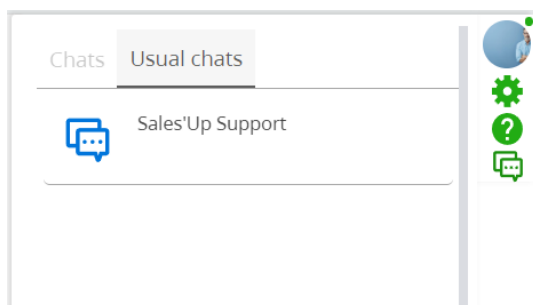
Give portal users access to the Chat Channel object.

You can read more about setting up rights on the portal at the academy:

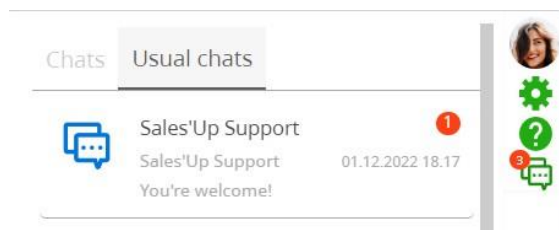
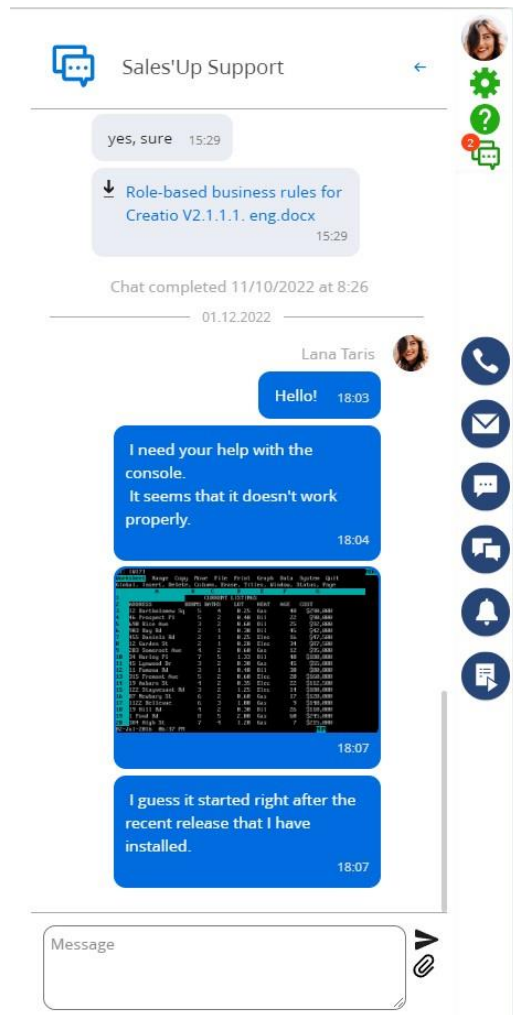
[Portal Creatio overview | Creatio Academy](#)

User experience with internal communication channels

The user can maintain internal communication in the channel (for example, support chat).

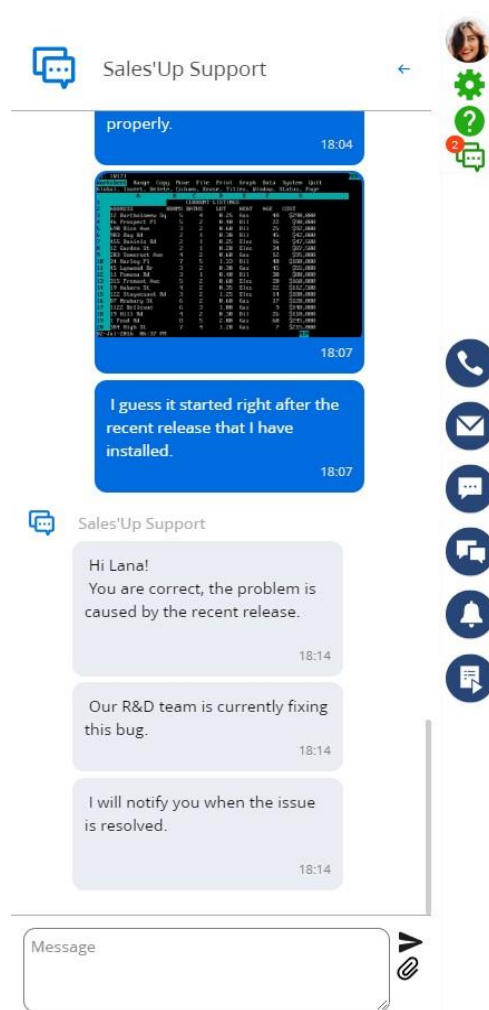


The user can send text messages, images or files. He also sees all the operator's answers in the form of a chat.



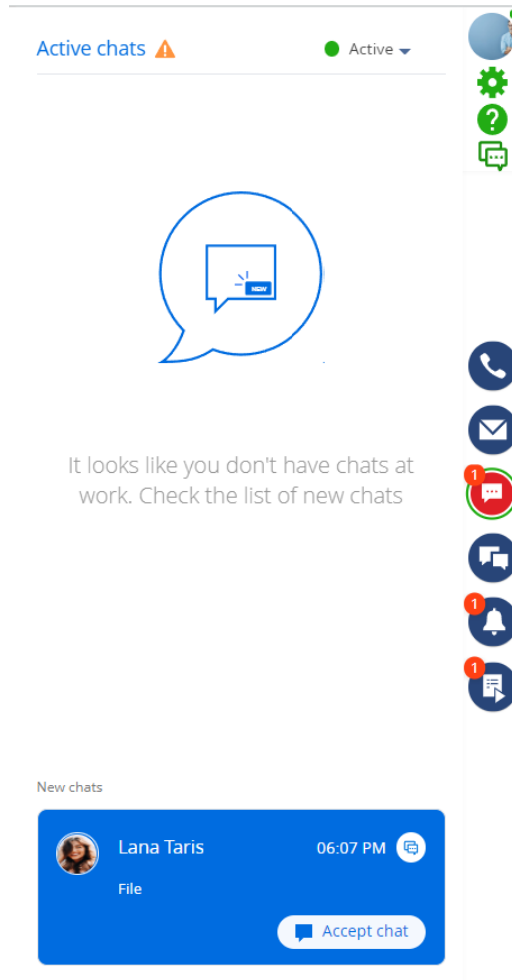
If the user has closed the chat, then the indicator of received messages will be displayed above the icon as the number of unread messages. When the chat list is open, you can see how many unread messages for each channel.

For a user in a chat, the sender of the message will be displayed on behalf of the chat:

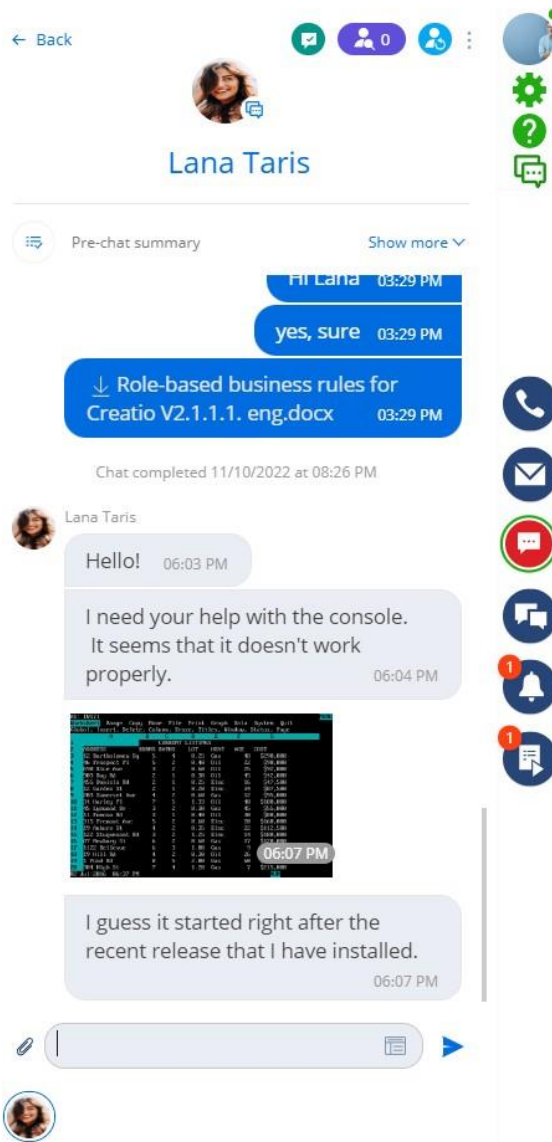


Operator's experience with chats

Standard work with chats is described at the academy. [Work with chats | Creatio Academy](#)

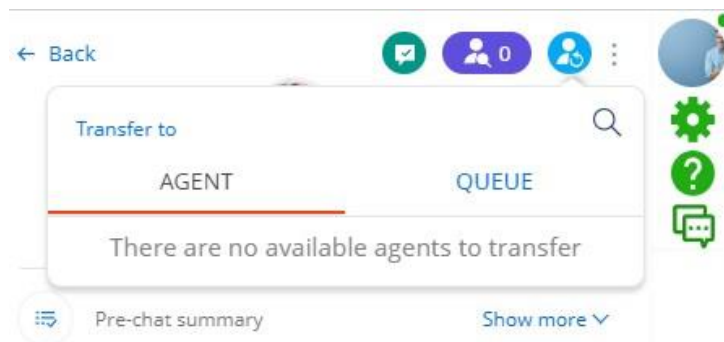


After accepting the chat, the operator has access to the correspondence with the user that was carried out earlier,

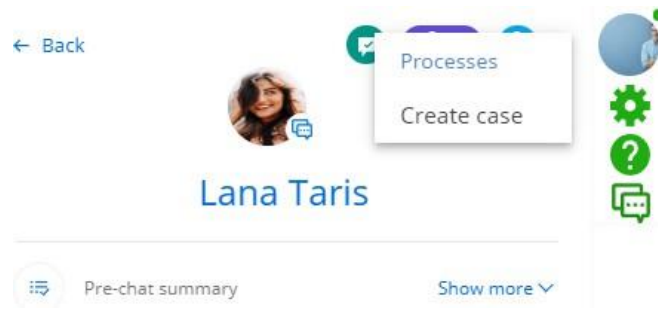


as well as the following actions:

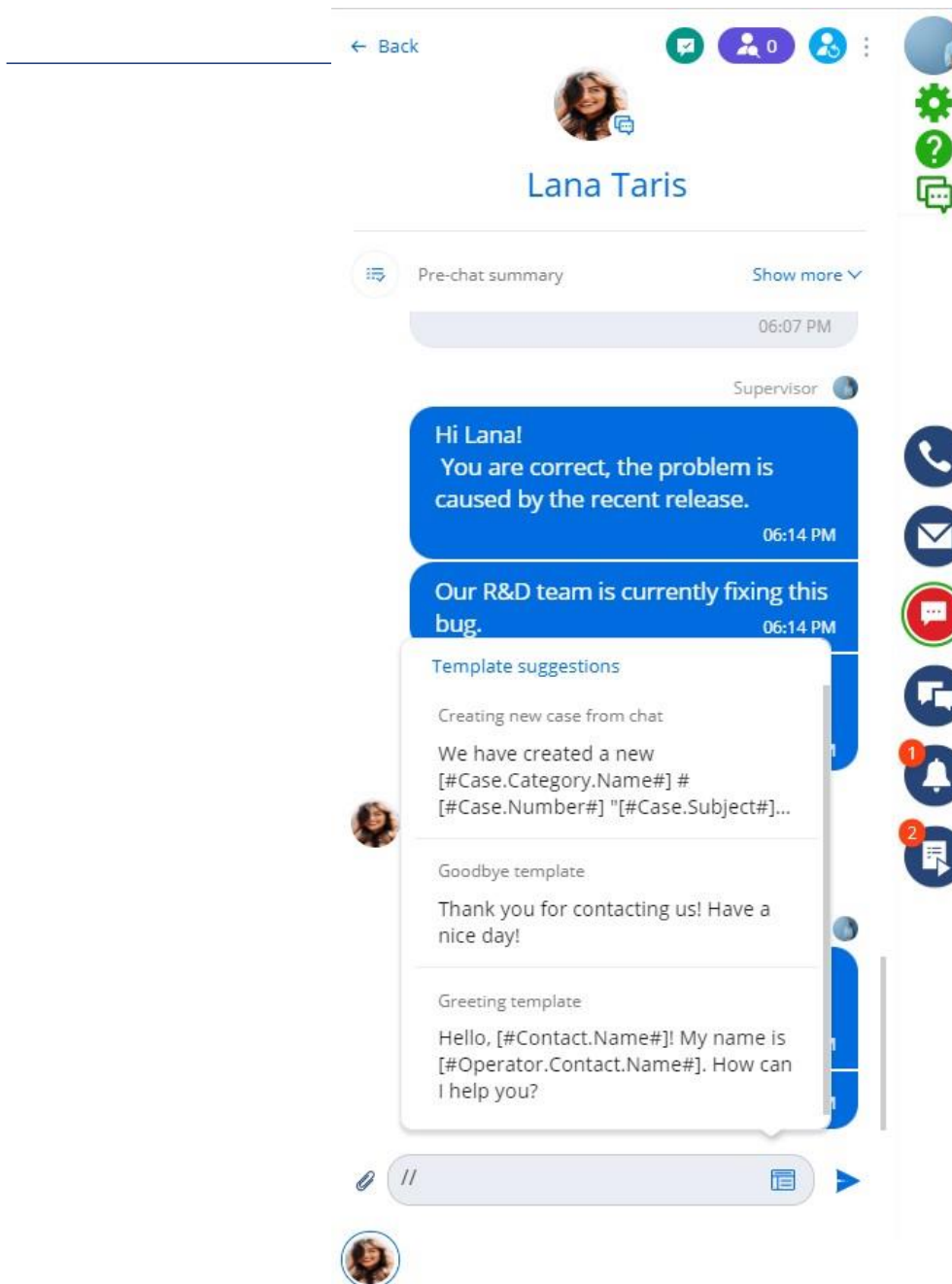
- End chat;
- Check duplicate contacts;
- Transfer chat to operator or queue.



By the action of the chat «Create a call», the operator can create a call from the chat.



The operator can use a template for a quick response.



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