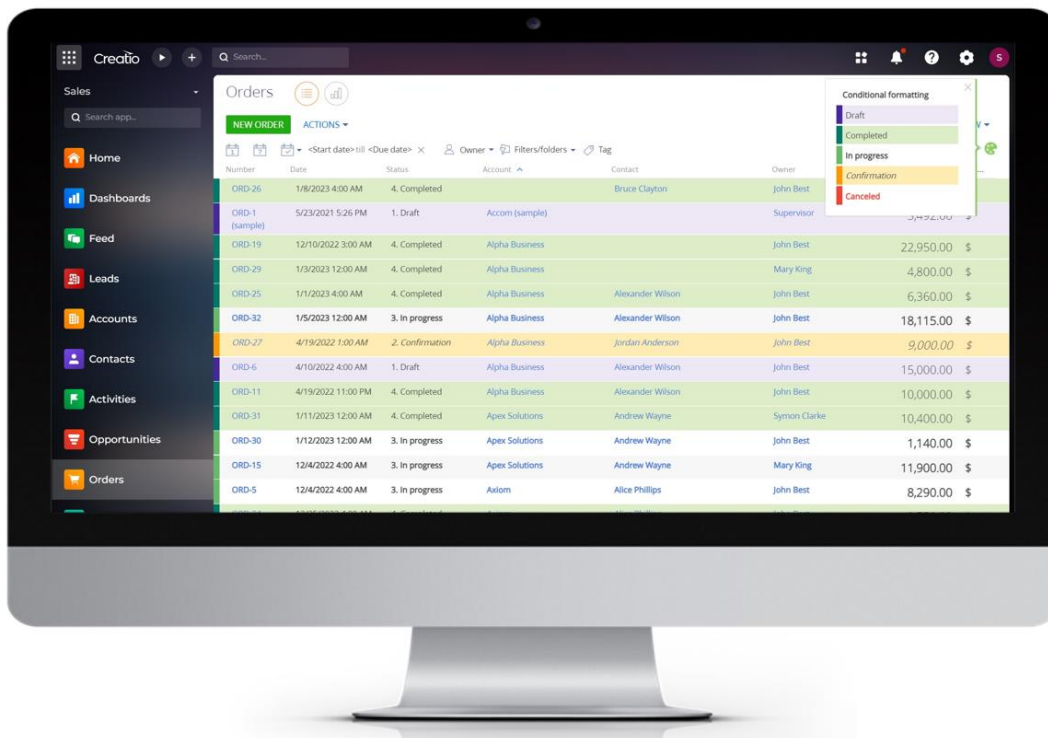




CONDITIONAL RECORDS FORMATTING FOR CREATIO



Guide to setup and utilization

11.05.2023

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Product description

Sales'Up Conditional Records Formatting for Creatio product – a tool, which allows setting the conditions for a visual display of any records in a section's registry or detail depending on customized filters.

The product provides the possibility to partially or fully change a visual display of registry records – from border color of a record to its text color or format.

Use cases

The product functionality is versatile and can be used by companies of any industry.

While working with requests, a user can change the color of a registry record in accordance with its requirement status, or highlight only those registry records, to which a user is assigned as Responsible.

While working with orders, there is an opportunity to change the record's border color depending on the Account; make text bold for those records, where the payment is overdue; change the record's background and text color for those orders, where there is a product with a specified category and a number of such products is higher than a set figure.

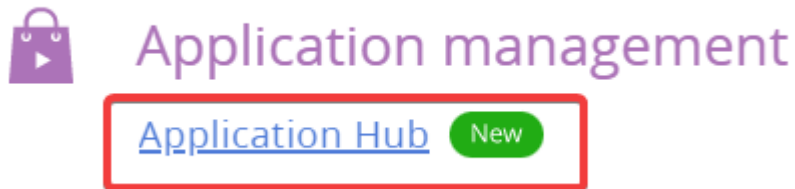
Key features

- The set-up wizard is convenient and intuitive;
- 6 elements of registry records formatting, which enables users to change colors of border, text, background, and to make text bold, italics, change its size;
- Possibility to add an unlimited number of conditions for one registry;
- Automatic generation of a hint in the registry with customized formatting conditions after saving the settings;
- Configuration of filtration of any complexity for formatting;
- Preview of the future setting to conveniently make changes and edits.

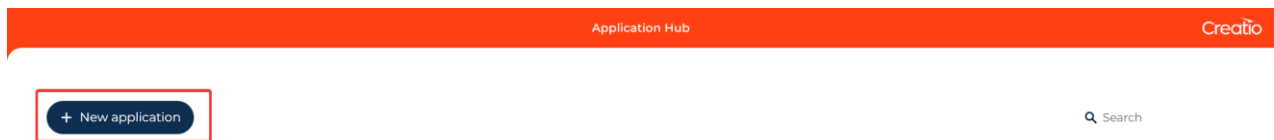
Product installation

To install packages click the button  and go to the «System designer».

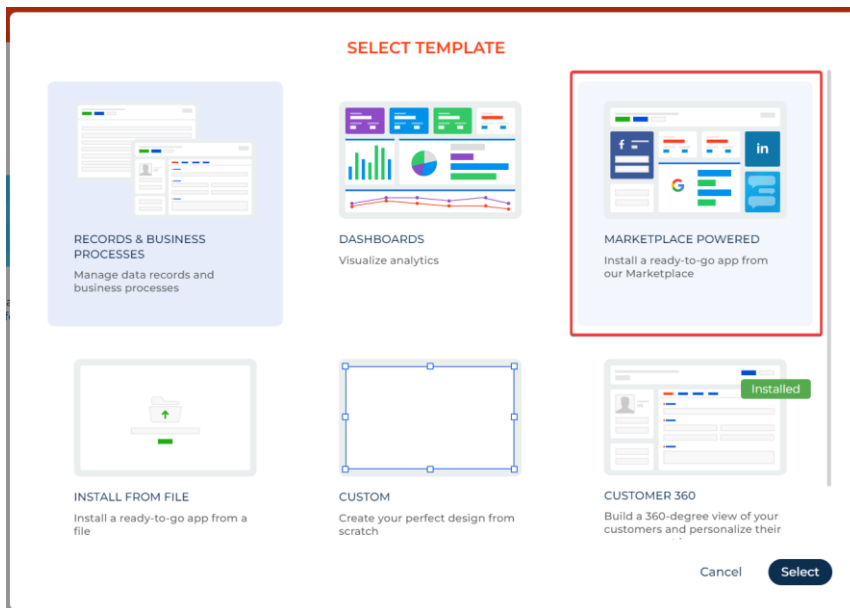
In the «Application management» section go to the «Application Hub».



On the «Application Hub» page, click the «New application»,



Select the «Marketplace powered» block and press the «Select» button.



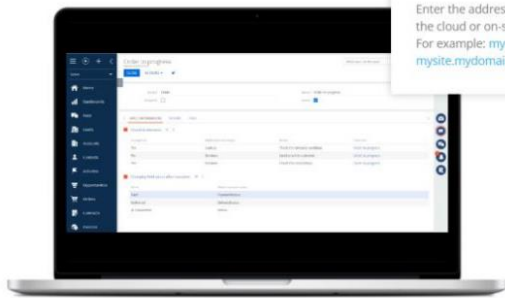
Click «Install» on a product's page.



Enter the address of the Creatio website which the product is supposed to be installed on.

Checklists for Creatio

Try the 14-day free trial of the application with your Creatio system.

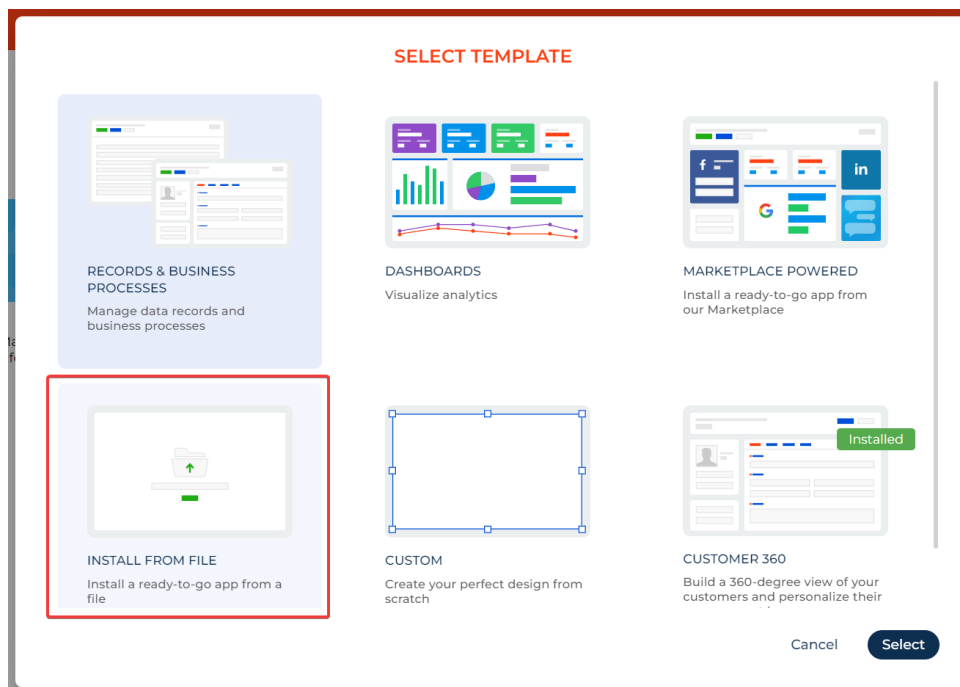


Enter the address of your Creatio system in the cloud or on-site.
For example: `mysite.creatio.com` or `mysite.mydomain.com`.

A screenshot of the 'Install' wizard in Creatio. It features a 'Domain*' input field with a red border and a red arrow pointing to it. Below the field is an orange 'Install' button. A disclaimer at the bottom states: 'By submitting this form, you confirm that you agree with the Public Offer Agreement and the relevant T&C published on the App's page.' A small note at the very bottom reads: '*The application can be installed automatically in Creatio version 7.11 and later. For other versions, applications can be installed manually with the Package Installation Wizard.'

Once an installation is completed, the log-in page pops up.

In case a product's package is installed from file, it is necessary to 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.

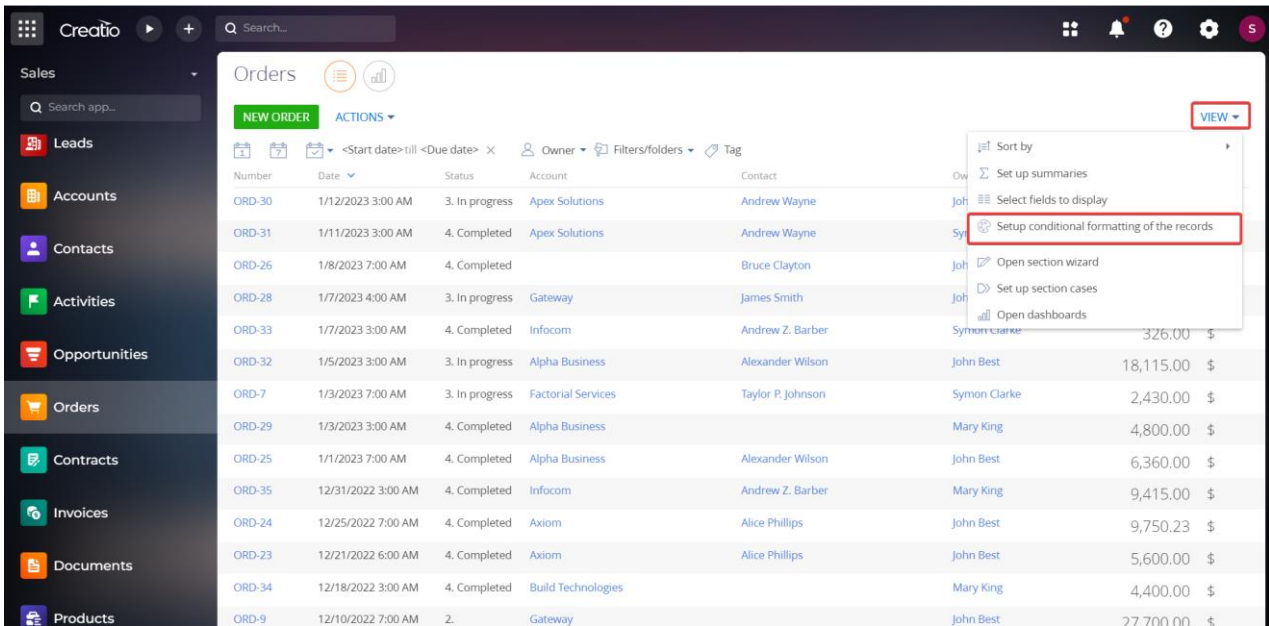


Set up conditional formatting of the records in the section registry

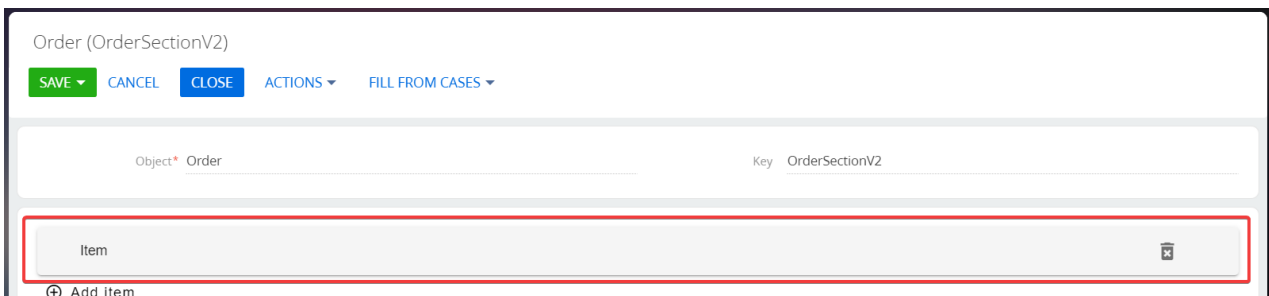
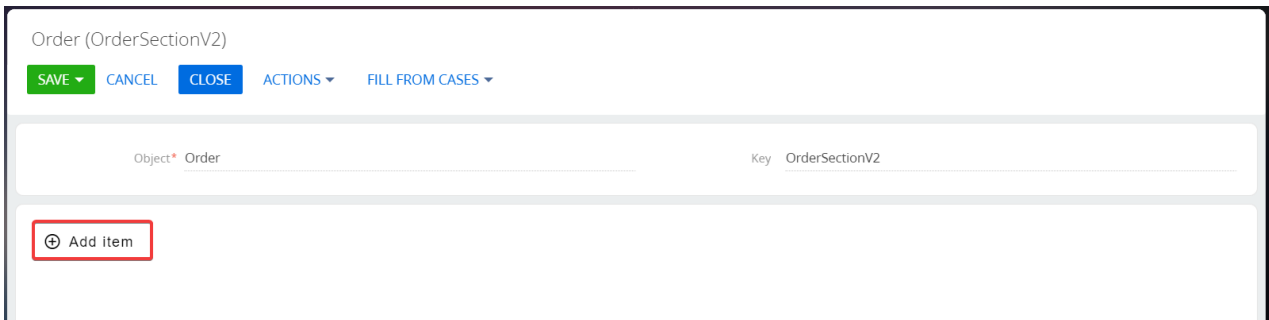
Add settings

To set up conditional formatting of records in the section registry:

1. Go to the section, which you need to customize records' formatting for;
2. Press the «View» button and select the «Setup conditional formatting of the records» option.

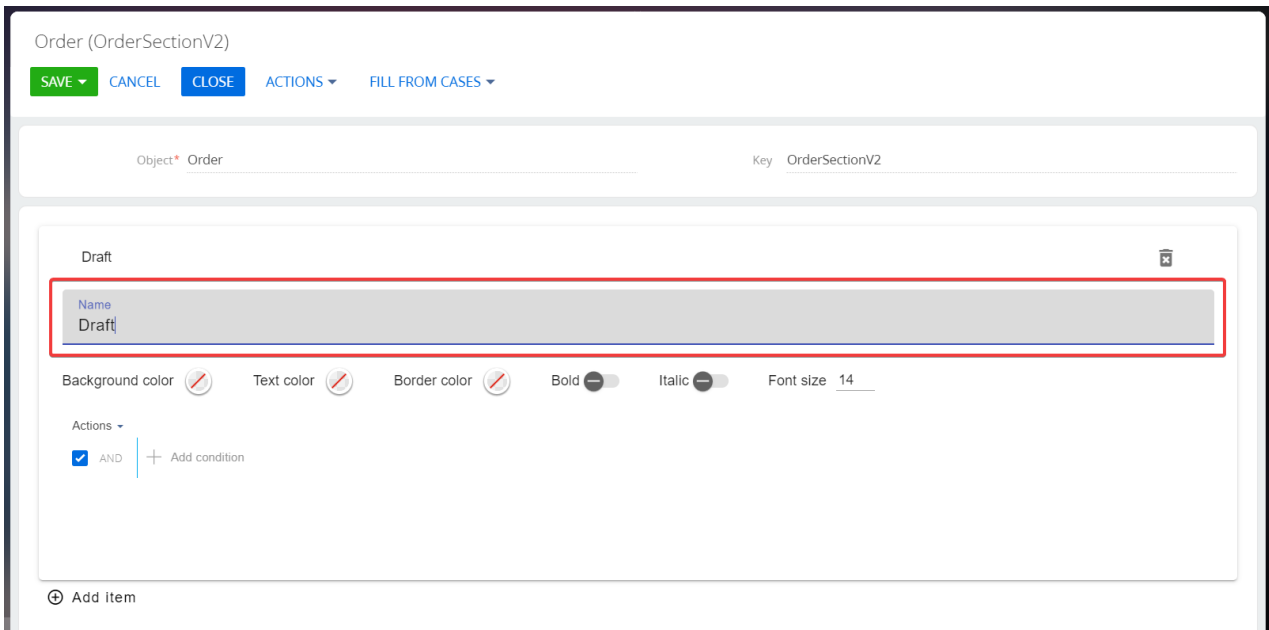


3. On the setup wizard page, press the «Add item» button,



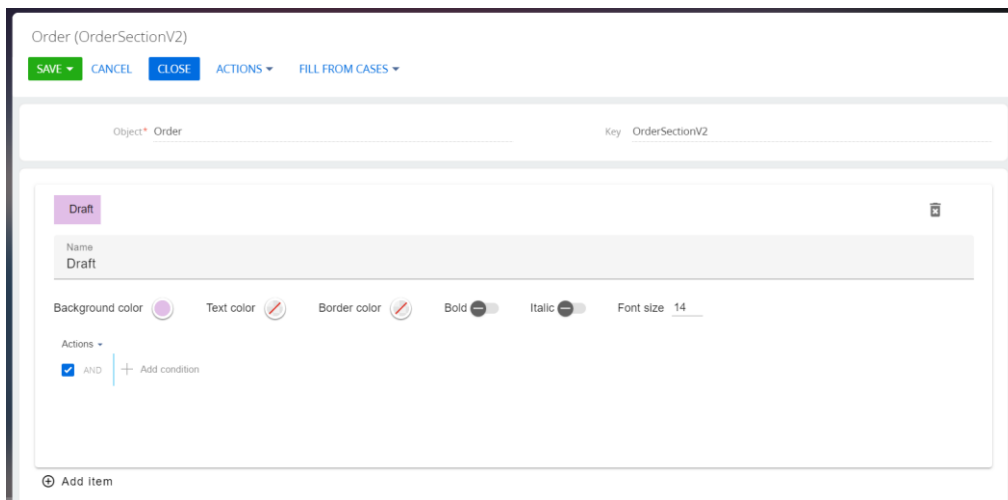
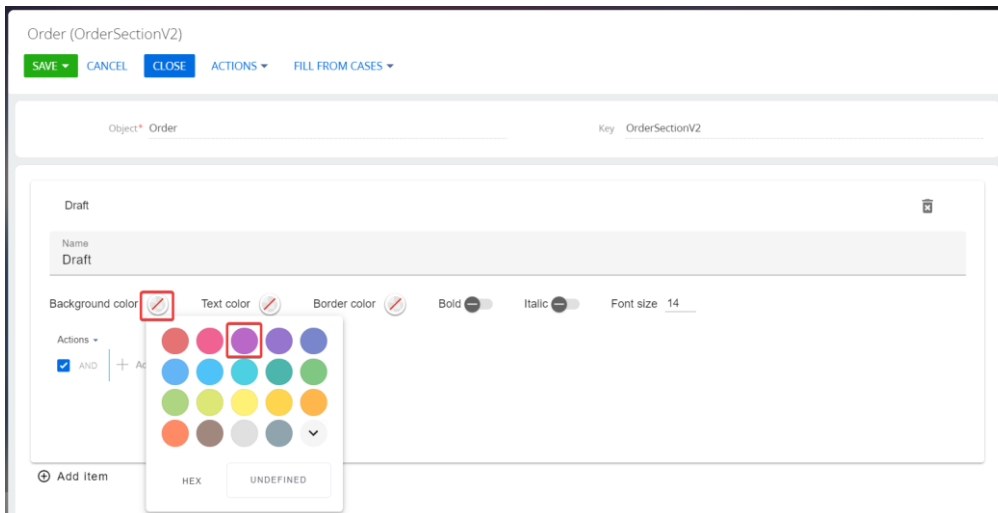
And add conditions for the formatting of records:

1. «Name» - specify a name of a configuration item, which will be displayed as a hint in a section registry after settings are saved;

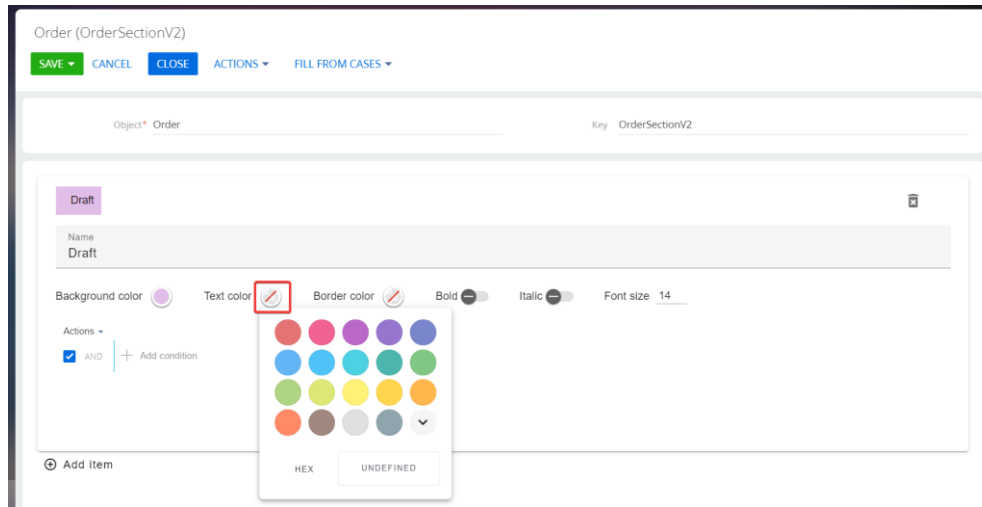


2. Add all necessary functions for the records' conditional formatting:

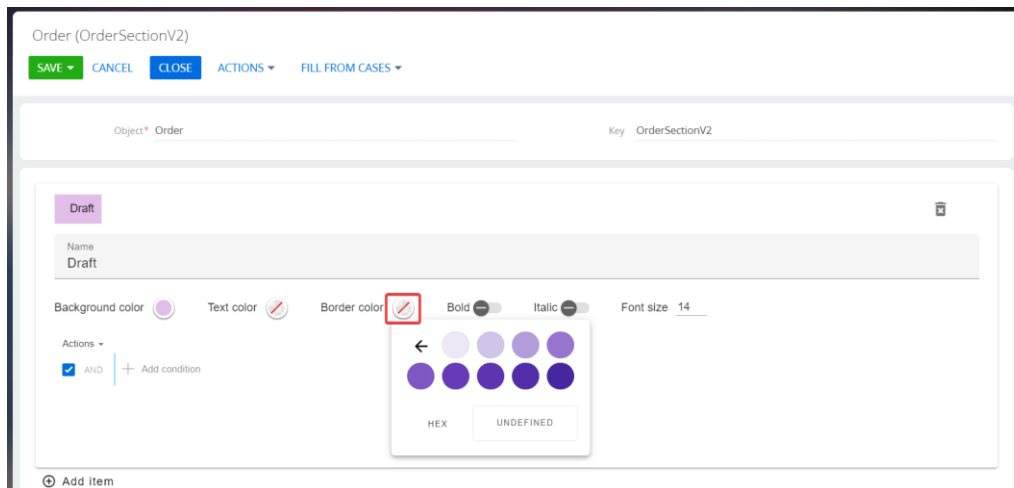
2.1 If applicable, choose the background color by pressing one on the color panel in the «Background color» field;




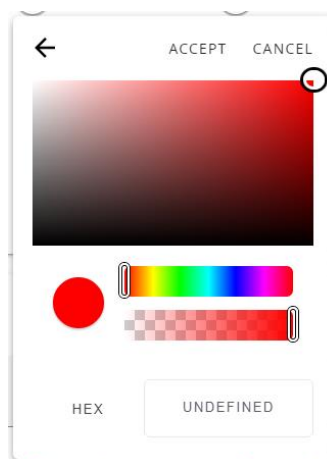
2.2 If applicable, choose the text color by pressing one on the color panel in the «Text color» field;



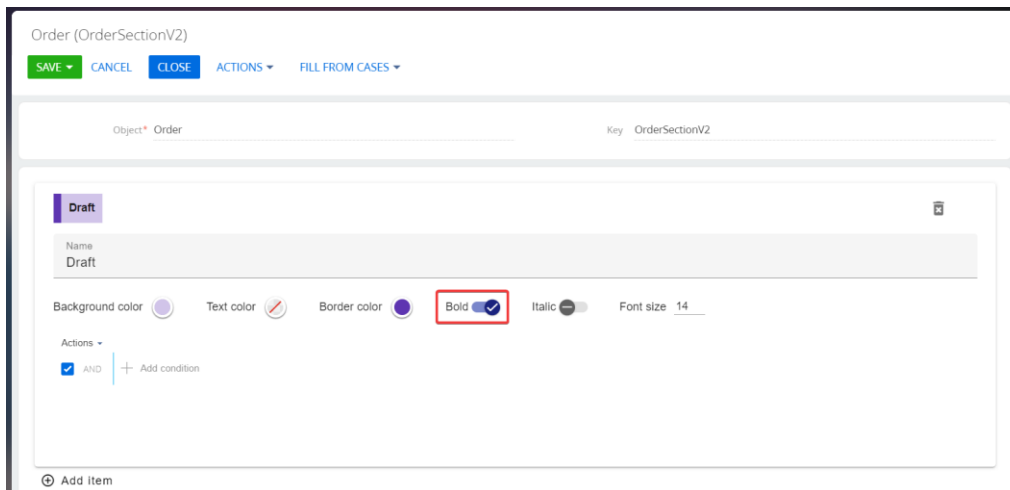
2.3 If applicable, choose the border color by pressing one on the color panel in the «Border color» field;



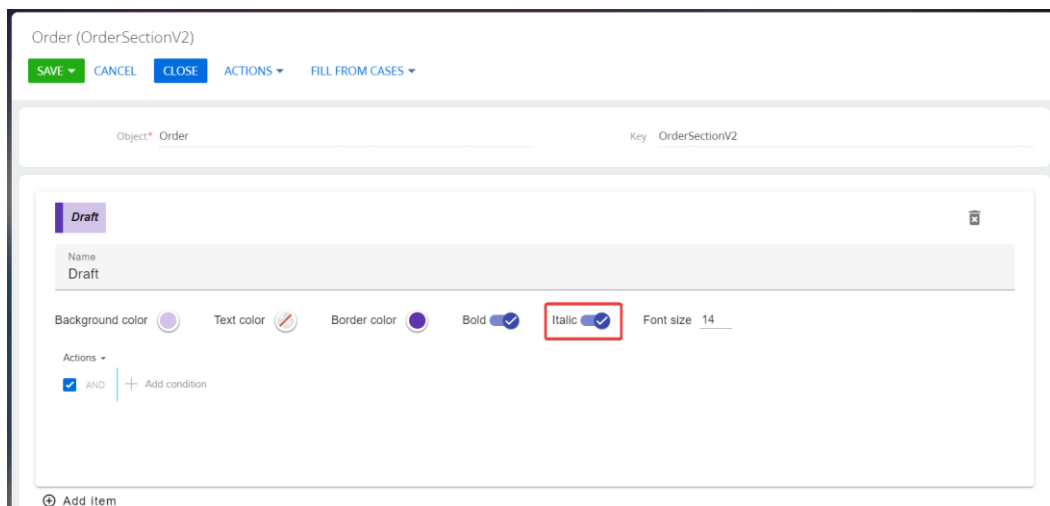
Note! User can choose and customize any desired shade of color by clicking this  icon on the color panel.



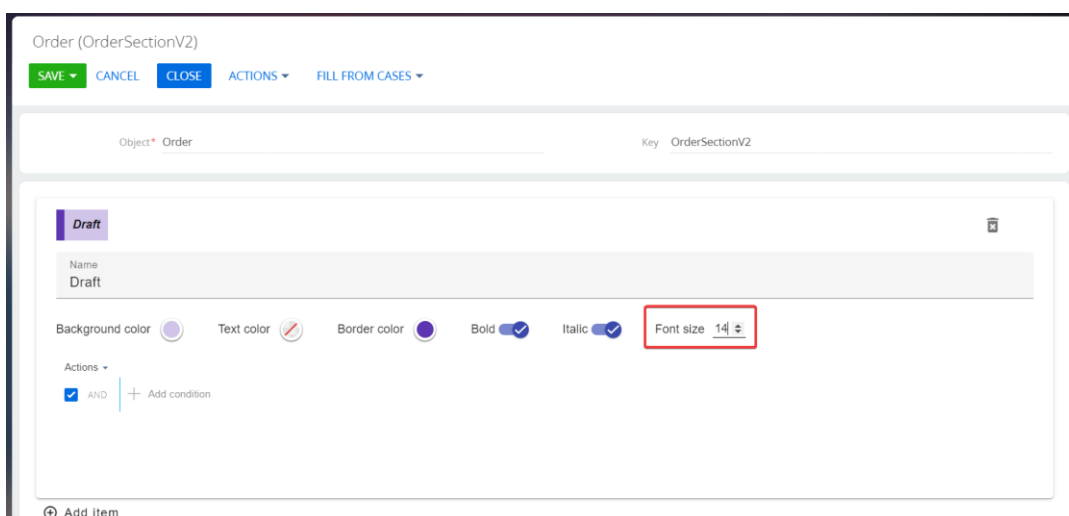
2.4 Activate the «Bold» check-box, if you need to make text bold;



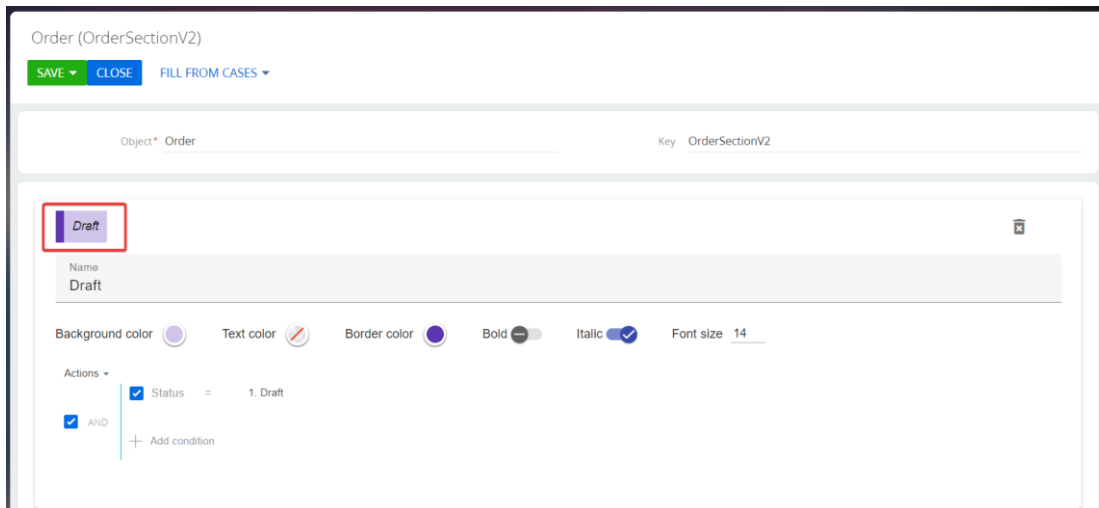
2.5 Activate the «Italic» check-box, if you need to make text italics;



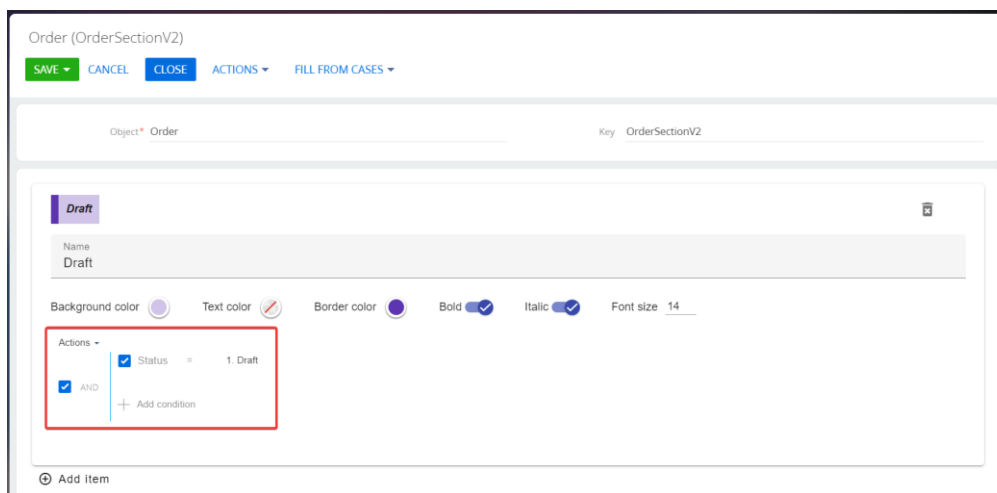
2.6 Enter the font size, or change it in the «Font size» field by clicking the up and down arrows.



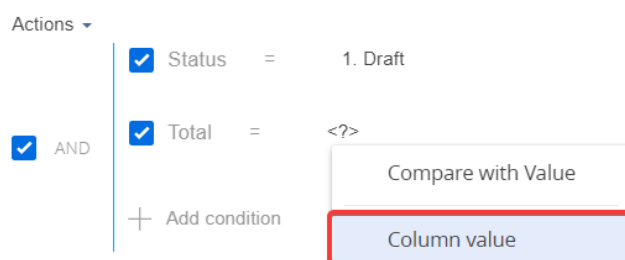
For every configuration item, there is a preview, which dynamically changes and displays the view of future row's conditional formatting in the registry.



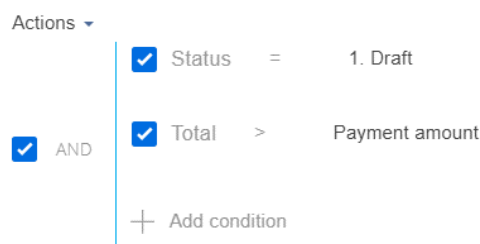
3. Configure records' filtration, which the formatting must be applied for;



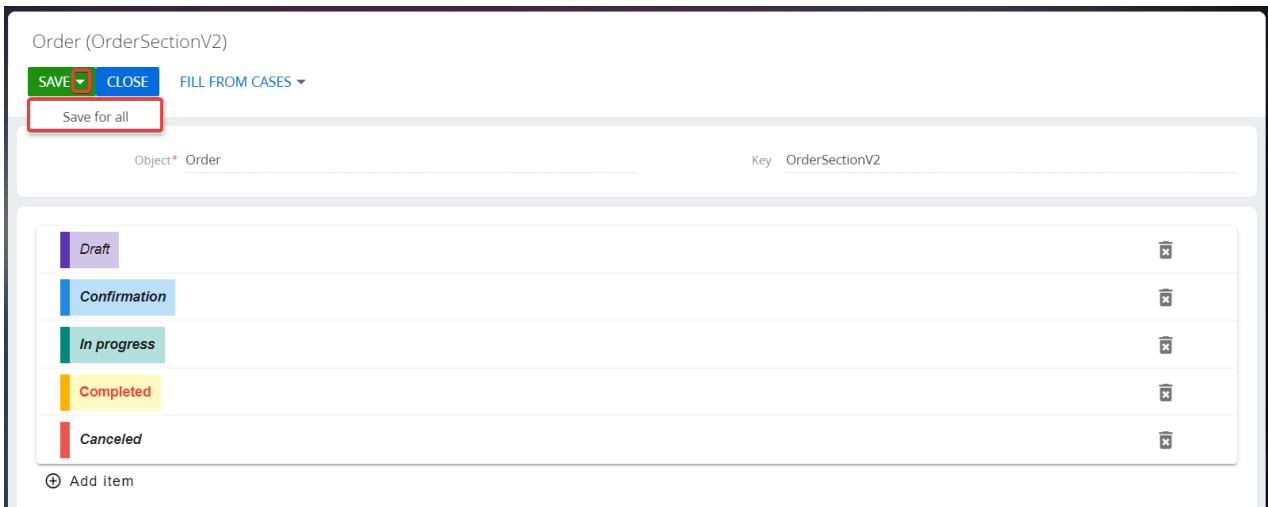
Note! All functions of the extended filter are available for users. It is also possible to set a filter condition with a comparison of columns.



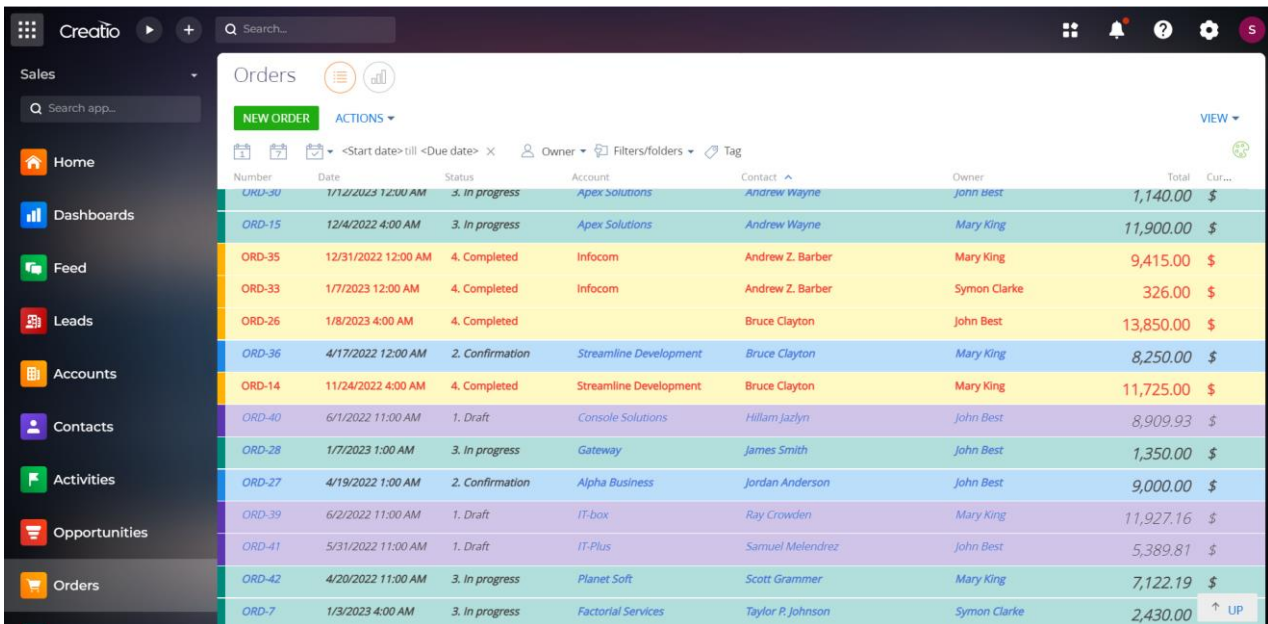
For instance, set up a filter for orders with a «Draft» status, where a total sum of an order > payment amount.



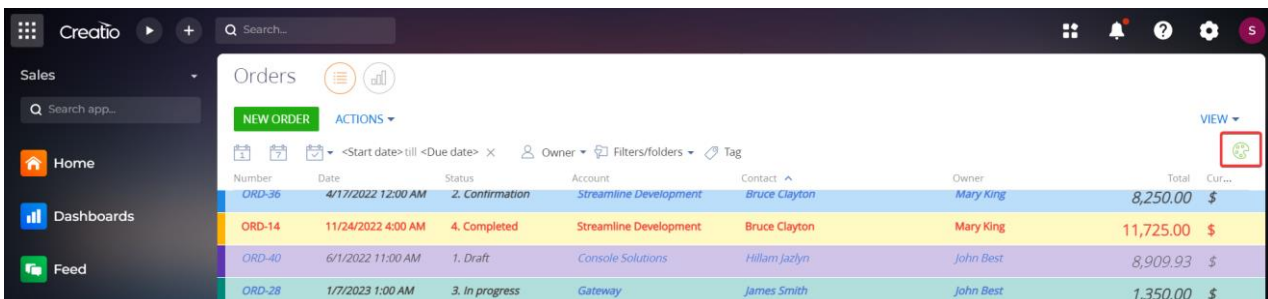
Once all items of conditional formatting are configured, press the «Save» button. User with the administrator rights can apply these settings for all other users.



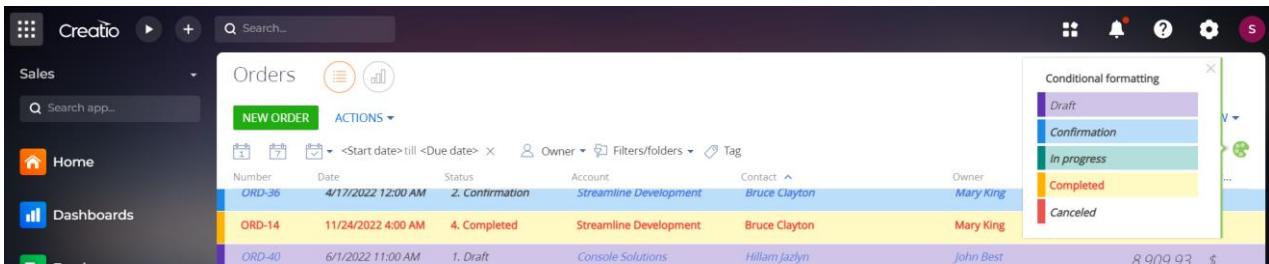
Upon saving the settings, records' conditional formatting will be applied to the section records.



After that, a button in the form of a palette will be displayed in a relevant section.



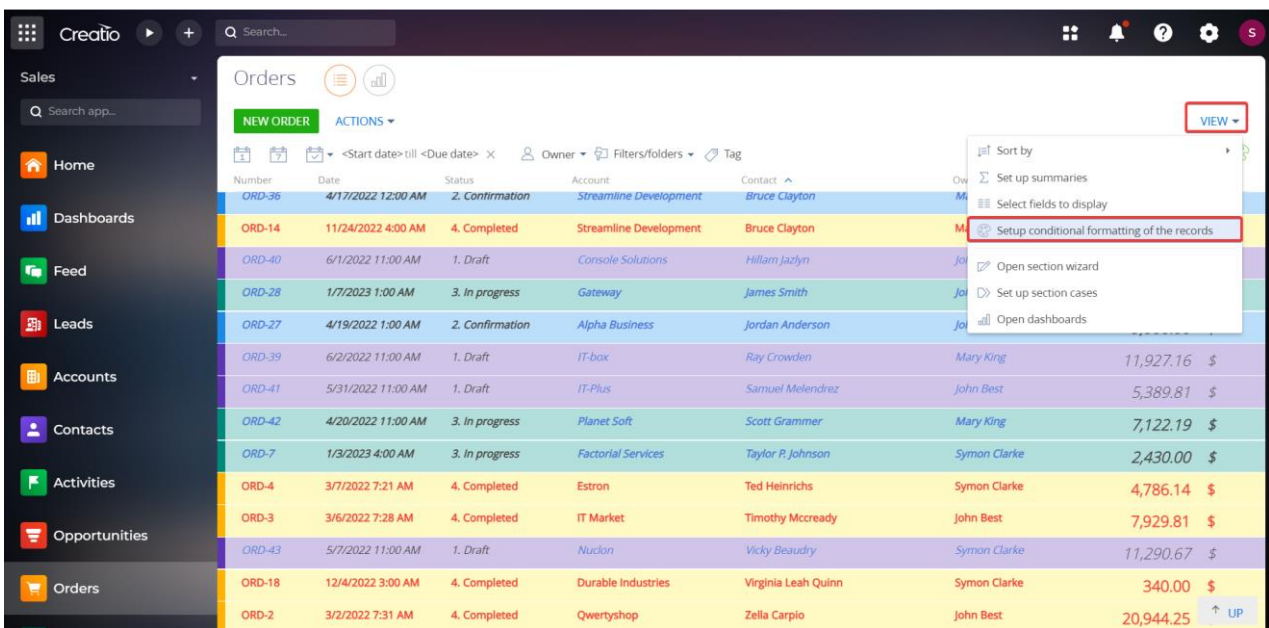
When you hover over the button, a hint pops up in a section for each item of records' conditional formatting.



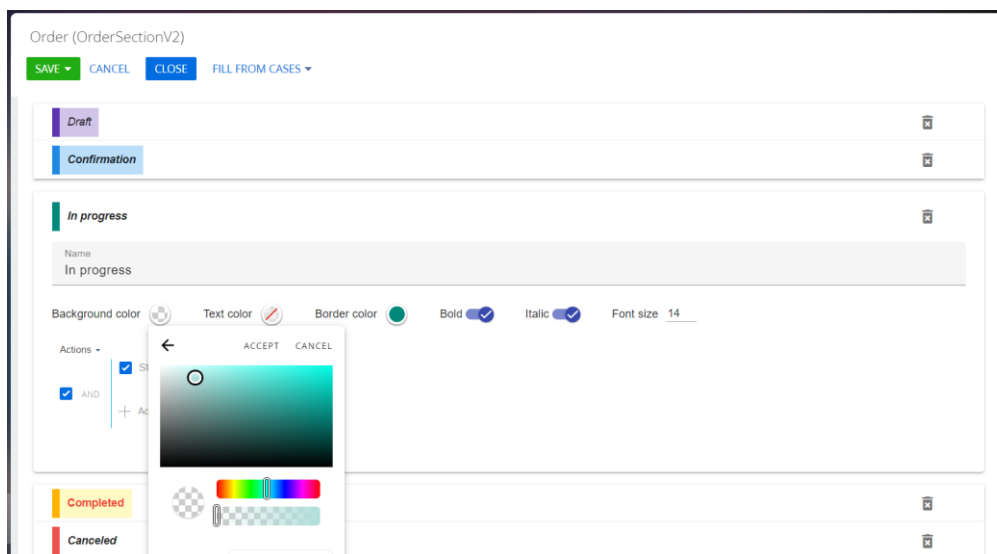
Edit settings

To edit the existing setting of records' conditional formatting:

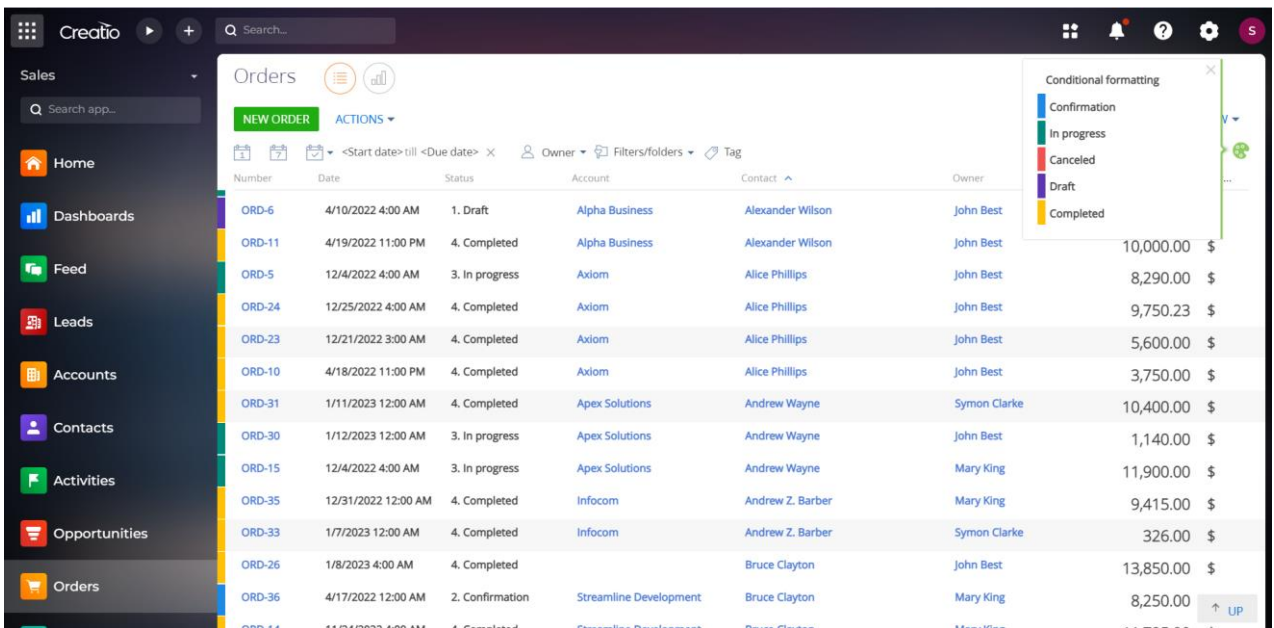
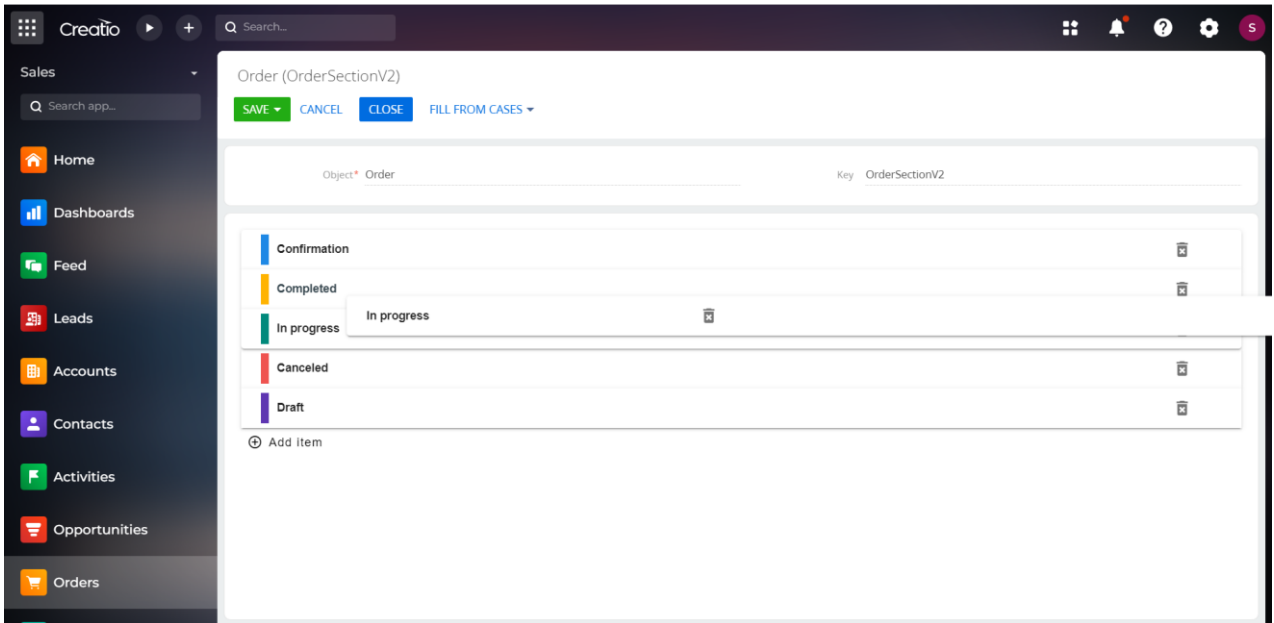
1. Go to the relevant system section which it is needed to customize conditional formatting for;
2. Press the «View» button and select the «Setup conditional formatting of the records» option.



3. Select an item, which needs to be changed and edit it. All changes will immediately be displayed in a preview.

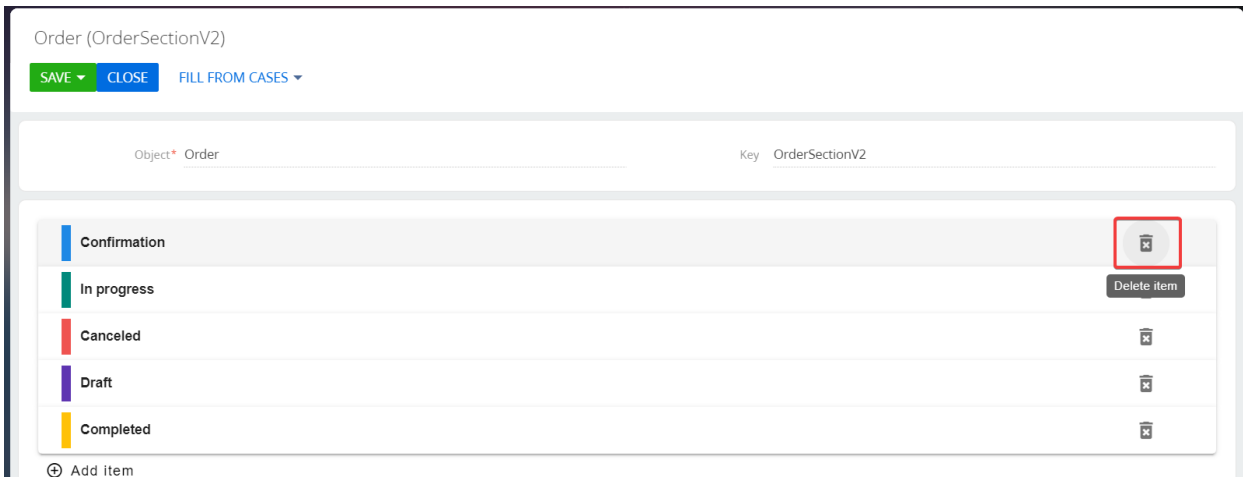


User is also able to change the items display order in a hint by dragging the item to a needed level on the setup wizard page.

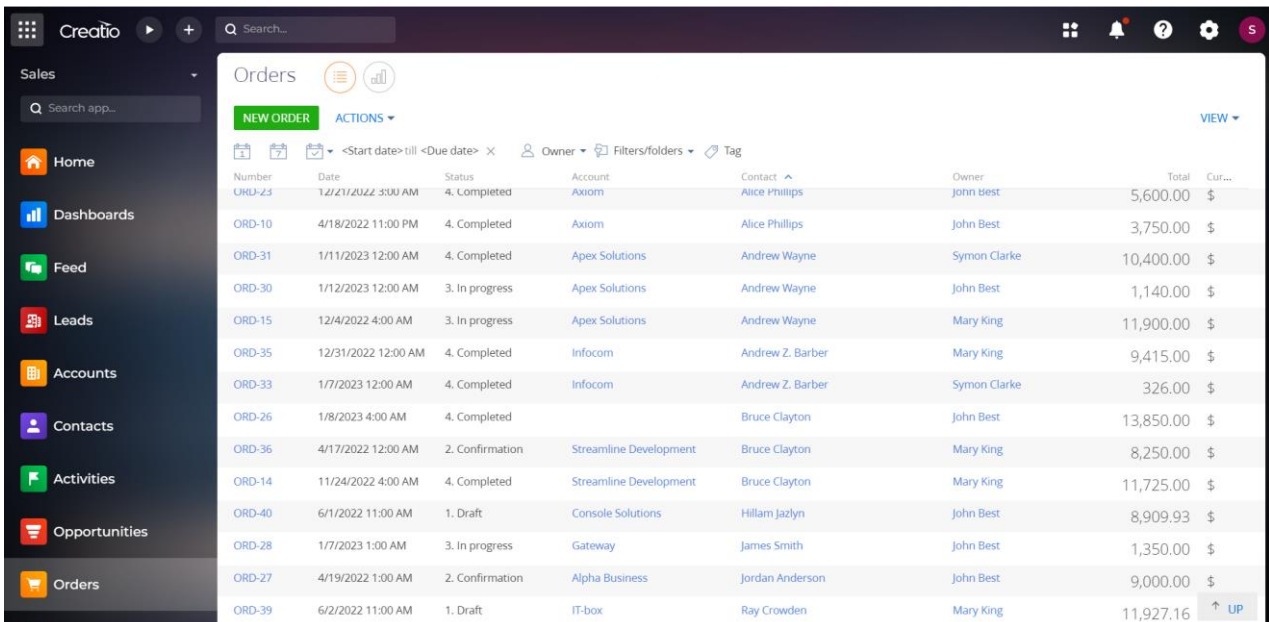


Delete settings

To delete settings go to the setup wizard of records' conditional formatting and press the «Delete item» button on the corresponding configuration item.

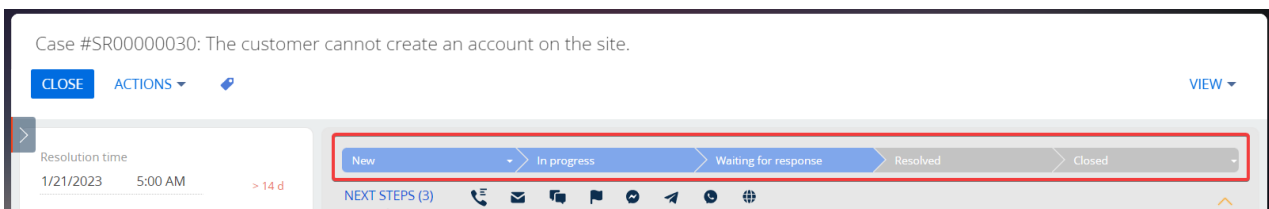


After all configuration elements are deleted, a palette button will not be displayed and all records in a registry will be of a standard view for this section.



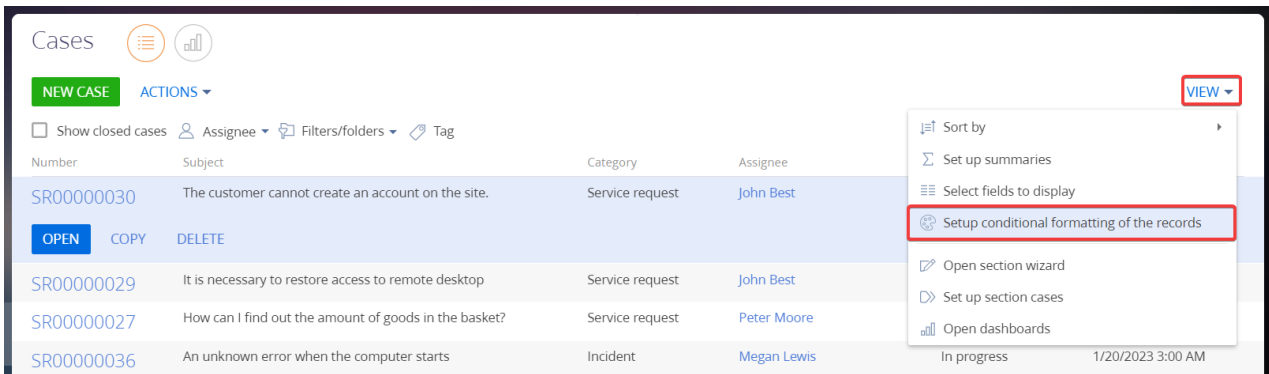
Add elements of conditional formatting from the section's DCM panel

In case colors are setup for stages on the section's DCM panel, a user can quickly apply these settings to records' conditional formatting of this section.

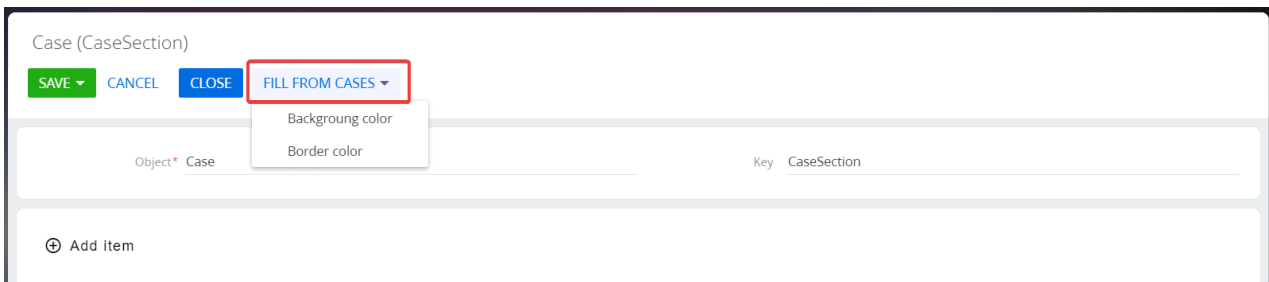


To do that:

1. Go to the section which records' conditional formatting needs to be applied to;
2. Press the «View» button and go to the setup wizard of conditional formatting of the records;

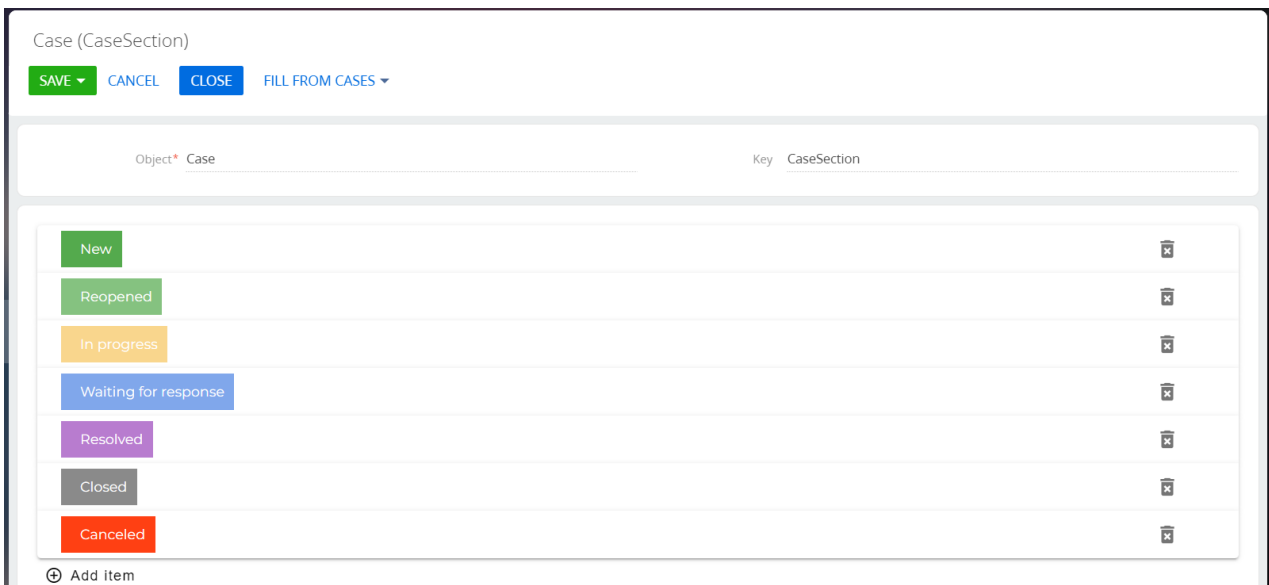


3. On the setup wizard page trigger the «Fill from cases» action.



There are 2 actions available for a user to apply case's settings to records' conditional formatting:

- Background color.



Upon the completion of an action, the item for each stage will be created automatically. The background color will be applied in accordance with the stage color.

Number	Subject	Category	Assignee	Status	Resolution time
SR0000030	The customer cannot create an account on the site.	Service request	John Best	Waiting for response	1/21/2023 5:00 AM
SR0000029	It is necessary to restore access to remote desktop	Service request	John Best	In progress	1/21/2023 2:00 AM
SR0000027	How can I find out the amount of goods in the basket?	Service request	Peter Moore	New	1/20/2023 1:00 PM
SR0000036	An unknown error when the computer starts	Incident	Megan Lewis	In progress	1/20/2023 3:00 AM
SR0000048	Consultation on functionality	Service request	John Best	Waiting for response	1/19/2023 10:00 PM
SR0000046	What's your e-mail address?	Service request	Jason Robinson	New	1/19/2023 3:00 PM
SR0000044	Recovering password to login to the system	Service request	John Best	In progress	1/19/2023 1:14 AM
SR0000038	Color laserjet pro CP1025nw - printing issues	Service request	John Best	In progress	1/18/2023 12:21 PM
SR0000037	Consultation on settings	Service request	John Best	Waiting for response	1/17/2023 10:00 PM
SR0000041	Missing data on hard drive	Service request	John Best	In progress	1/17/2023 1:00 AM
SR0000025	The USB port on the laptop does not detect the device.	Incident	William Walker	In progress	1/2/2023 8:00 PM
SR0000020	Emails come without a return address and title.	Service request	Megan Lewis	In progress	12/23/2022 8:00 PM

- Border color.

Case (CaseSection)

SAVE CANCEL CLOSE FILL FROM CASES

Object* Case Key CaseSection

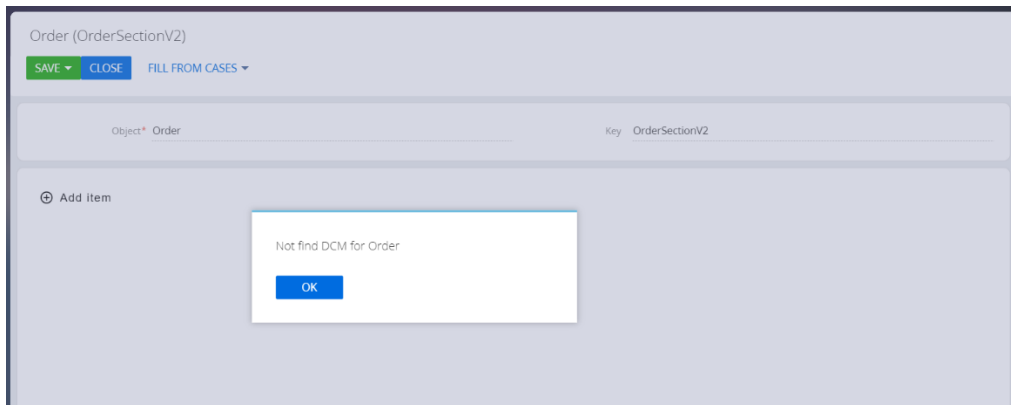
New	
Reopened	
In progress	
Waiting for response	
Resolved	
Closed	
Canceled	

+ Add Item

Number	Subject	Category	Assignee	Status	Resolution time
SR0000030	The customer cannot create an account on the site.	Service request	John Best	Waiting for response	1/21/2023 5:00 AM
SR0000029	It is necessary to restore access to remote desktop	Service request	John Best	In progress	1/21/2023 2:00 AM
SR0000027	How can I find out the amount of goods in the basket?	Service request	Peter Moore	New	1/20/2023 1:00 PM
SR0000036	An unknown error when the computer starts	Incident	Megan Lewis	In progress	1/20/2023 3:00 AM
SR0000048	Consultation on functionality	Service request	John Best	Waiting for response	1/19/2023 10:00 PM
SR0000046	What's your e-mail address?	Service request	Jason Robinson	New	1/19/2023 3:00 PM
SR0000044	Recovering password to login to the system	Service request	John Best	In progress	1/19/2023 1:14 AM
SR0000038	Color laserjet pro CP1025nw - printing issues	Service request	John Best	In progress	1/18/2023 12:21 PM
SR0000037	Consultation on settings	Service request	John Best	Waiting for response	1/17/2023 10:00 PM
SR0000041	Missing data on hard drive	Service request	John Best	In progress	1/17/2023 1:00 AM
SR0000025	The USB port on the laptop does not detect the device.	Incident	William Walker	In progress	1/2/2023 8:00 PM
SR0000020	Emails come without a return address and title.	Service request	Megan Lewis	In progress	12/23/2022 8:00 PM

If it is necessary, a user is able to make any changes in configuration items upon records' conditional formatting from a case.

Limitations! If there are no DCM panel cases setup for the section, a pop-up with a «Not find DCM for Order» message will appear when attempting to apply case's settings to records' conditional formatting of the section.

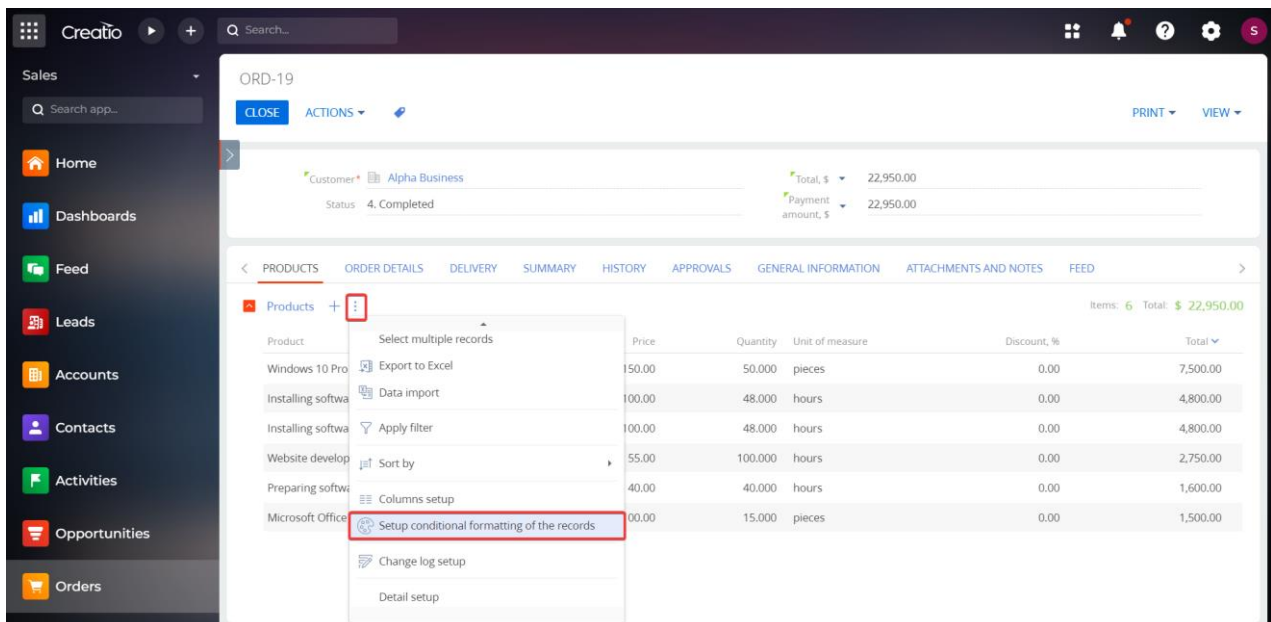


Set up conditional formatting of the records in the detail registry

Add settings

To set up records' conditional formatting in a detail registry:

1. Click the 3-dotted menu on the detail, which records' conditional formatting must be applied to; and go to the setup wizard of records' conditional formatting.



Note! All subsequent settings of records' conditional formatting on the detail are similar to the [settings of records' conditional formatting in a registry](#).

Once everything is setup on the detail, a hint button with configuration items will be displayed on this detail.

Creatio

ORD-19

Customer: Alpha Business

Status: 4. Completed

Total, \$: 22,950.00

Payment amount, \$: 22,950.00

PRODUCTS ORDER DETAILS DELIVERY SUMMARY HISTORY APPROVALS GENERAL INFORMATION ATTACHMENTS AND NOTES FEED

Products + Items: 6 Total: \$ 22,950.00

Pro	Price	Quantity	Unit of measure	Discount, %	Total
W	150.00	50.000	pieces	0.00	7,500.00
Inf	100.00	48.000	hours	0.00	4,800.00
Installing software	100.00	48.000	hours	0.00	4,800.00
Website development	55.00	100.000	hours	0.00	2,750.00
Preparing software documentation	40.00	40.000	hours	0.00	1,600.00
Microsoft Office English	100.00	15.000	pieces	0.00	1,500.00

Conditional formatting: Price > 100

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