



BROWSER FILE VIEWER ADD-ON User Guide

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Browser File Viewer add-on

Creatio

Creatio is a low-code software-as-a-service solution for process management and CRM. The Creatio solution stack included Studio Creatio, a low-code platform, Sales Creatio, a sales force automation program, Marketing Creatio, and Service Creatio. It can be utilized to automate company processes, implement rules, and create third-party connectors. The framework was built in .NET, and customizations and scripts are built either in C# (server-side code) or JavaScript (client-side code).

The Creatio Partner Network is a global network of more than 700 businesses located in 110 nations. Recently, Creatio launched the No-Code Magic Campaign to Promote the Power of No code. Creatio is a next-generation CRM that can be the ideal instrument to help businesses become customer-centric enterprises by giving customers a seamless, consistent experience as they transition from leads to loyalty.

Browser File Viewer add-on

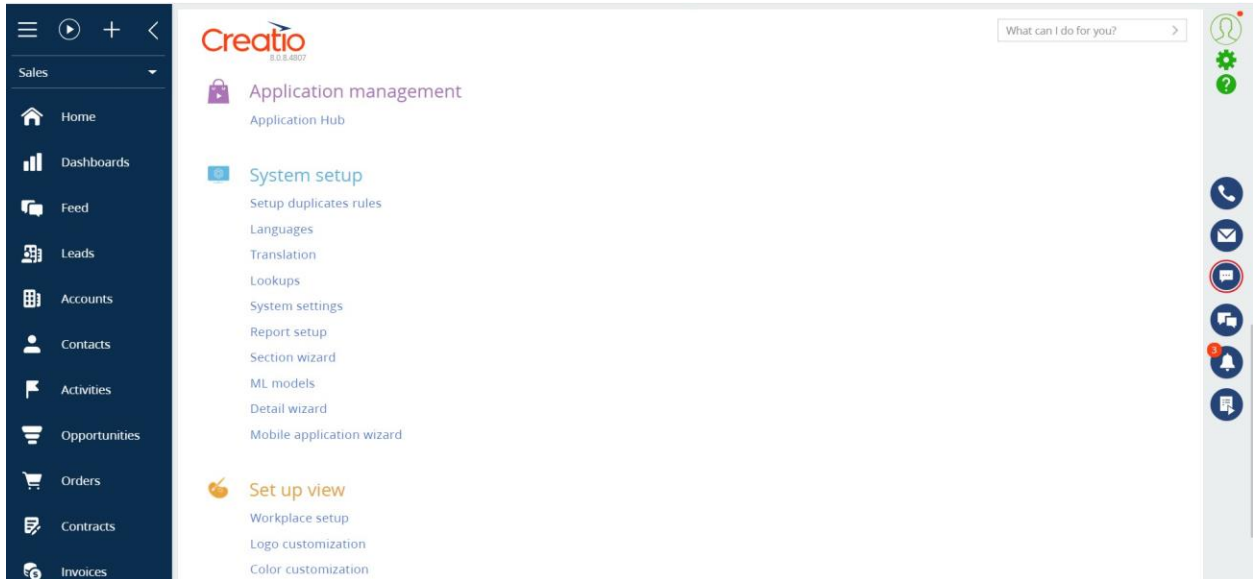
Browser File Viewer for Creatio is an add-on to preview attachments like .pdf, .png, .mp4, and more browser-supportable files in the browser that you normally wouldn't be able to view from Creatio.

Note: The Browser File Viewer add-on also supports .docx files with Word to PDF conversion using the Aspose PDF service.

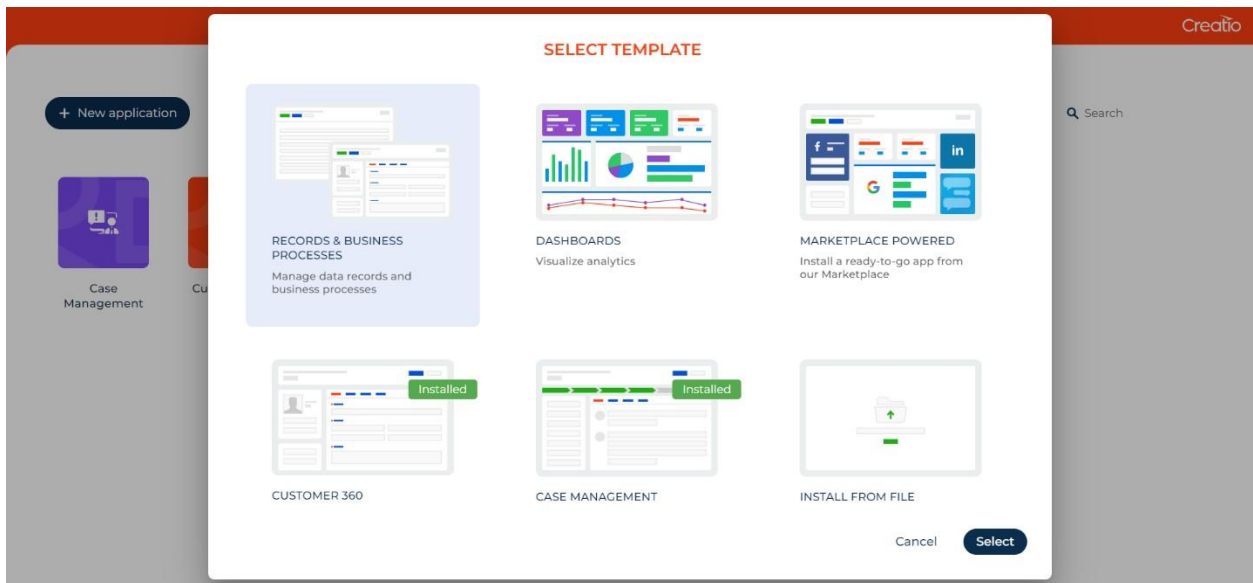
Setting up the add-on

To start off with setting up the add-on in your instance, please follow the below steps.

- First, go to the Application HUB and Install the add-on through the Marketplace.
 - o Go to the Application HUB.

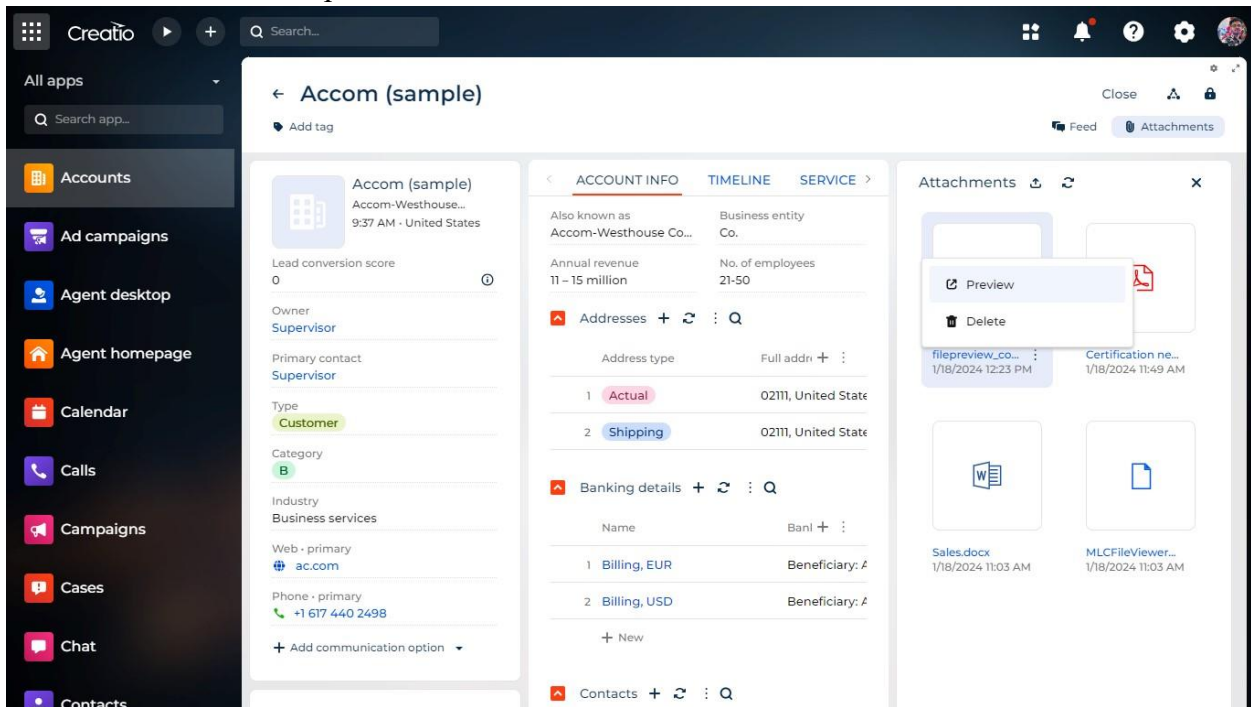


- o Click “New Application”
- o Select “Marketplace Powered”

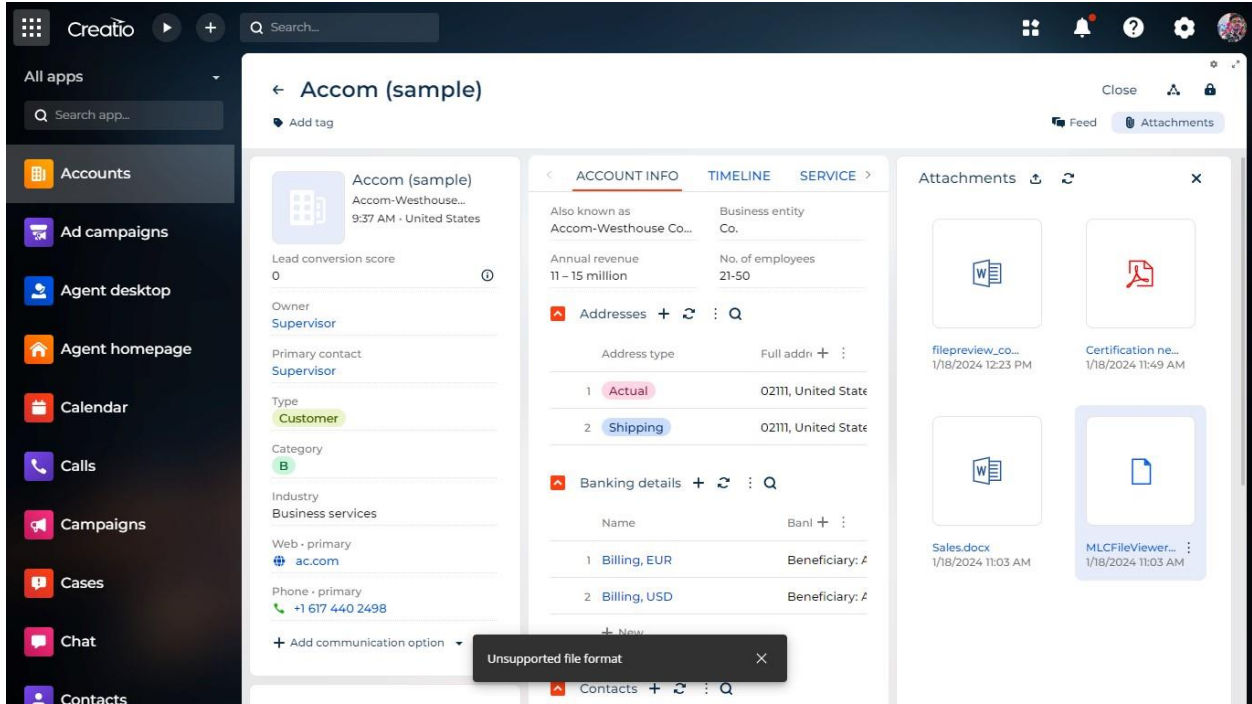


- Then Search for "Browser File Viewer add-on" from Mitra Innovation and click "Install".
- Then the preview button will be available for all the out-of-the-box attachment details. Also supports custom attachment details if we have more than one attachment detail in the same section.

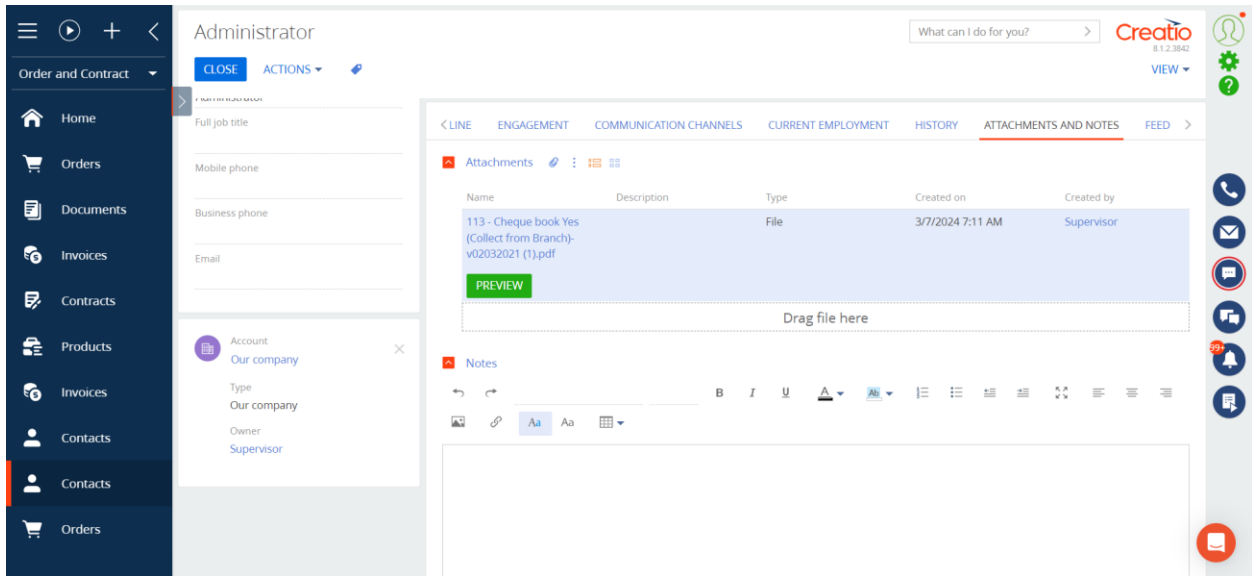
- In the **Freedom UI** sections, locate the preview option positioned above the delete option within the more options menu associated with each attachment.



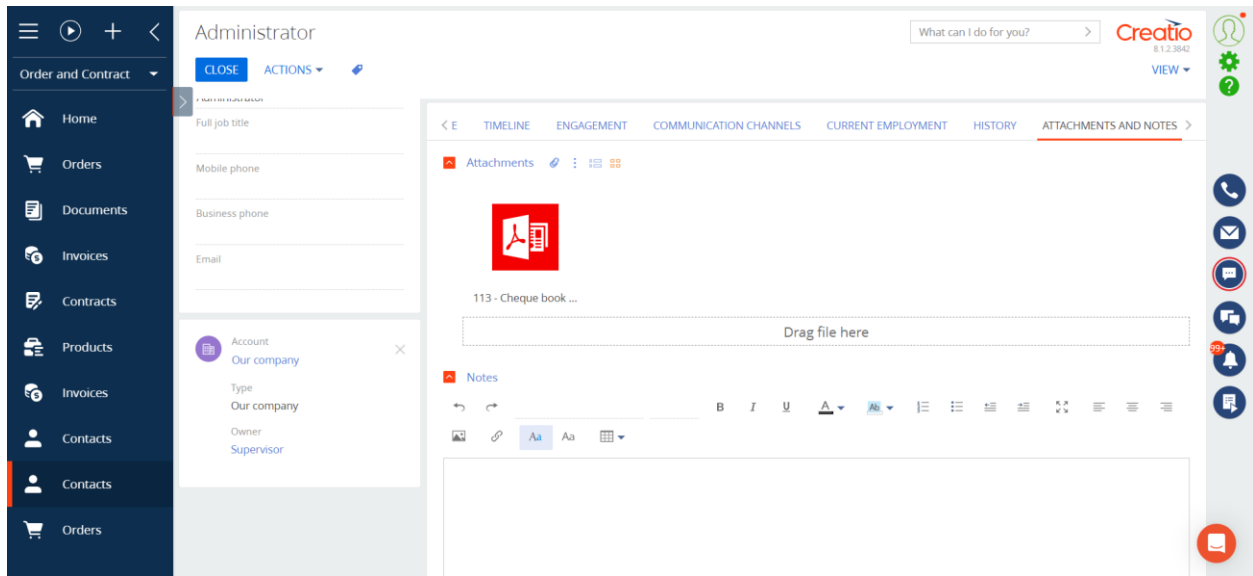
- If the attached file is in one of the supported formats, clicking "Preview" will open the file in a new tab.
- In case the format of the attached file is not supported, such as with zip files, clicking on "Preview" will trigger a toast notification indicating "Unsupported file format"



- In the **Classic UI** sections' attachments segment, select one record to see the preview button.

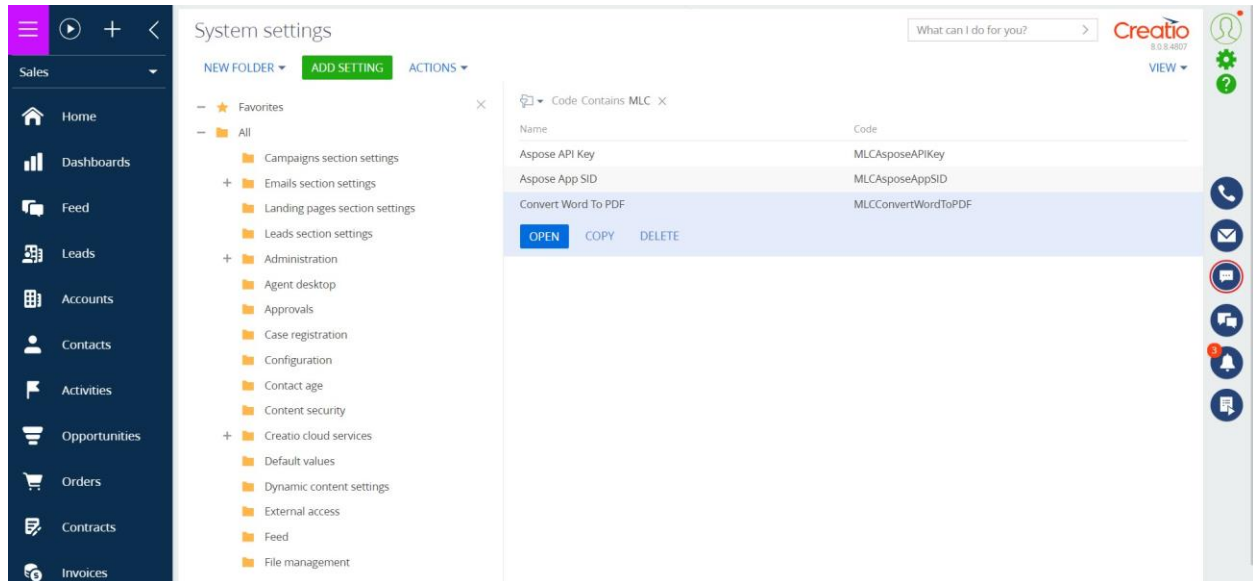


Note: In the classic UI, the Preview button will not be available for the tile view.



Add-on Related System Setting

- After Installation has succeeded, if you wish to preview .docx files, go to the system settings. Then Search for the below-mentioned system settings.



- The “Convert Word To PDF” system setting is true, only fill the remaining system settings values default value set to false.
- Register for the Aspose PDF service (<https://products.aspose.cloud/pdf/net>), add an application (My Apps> Add an App), and get access keys (Client Secret, Client ID).
- Fill in the system settings "Aspose API Key" (Client ID) and "Aspose App SID" (Client Secret) with the data from the above item, respectively.

Contact Us

For more details, please contact us.

Mitra Innovation
innovate@mitrai.com
+44 (0) 203 908 1977
www.mitrai.com

