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

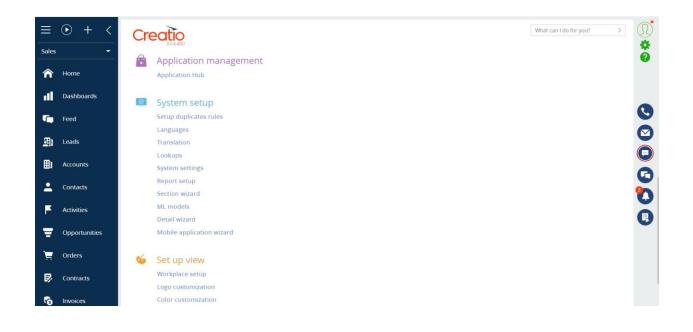
Browser File Viewer for Creatio is an add-on to preview attachments like .pdf, .png, .mp4, and more browser-supportable files in the browser that you normally wouldn't be able to view from Creatio.

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"

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- 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.

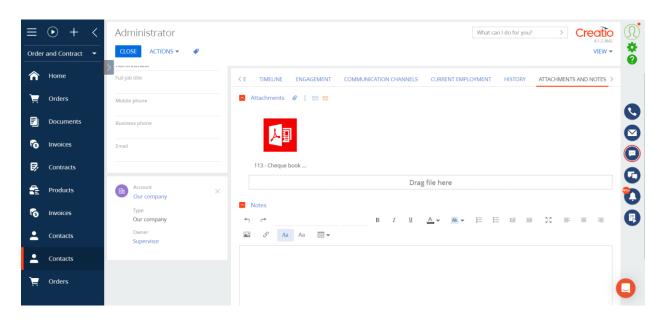
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Contacts		🔼 Contacts + 2 : Q		

- 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"

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

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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.

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Ä	Orders	 Dynamic content settings External access 				
₽	Contracts	Feed				
6	Invoices	File management				

- 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

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