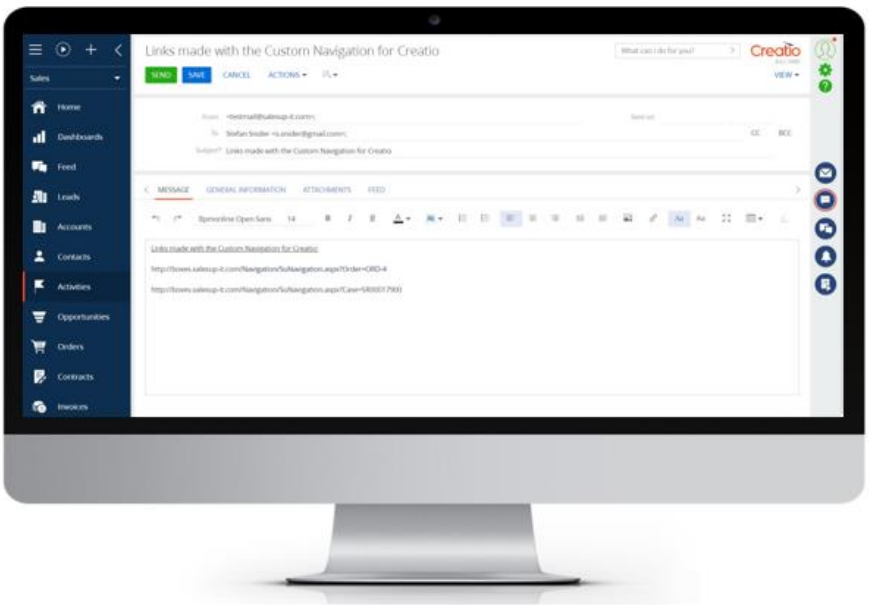
CUSTOM URLs FOR CREATIO

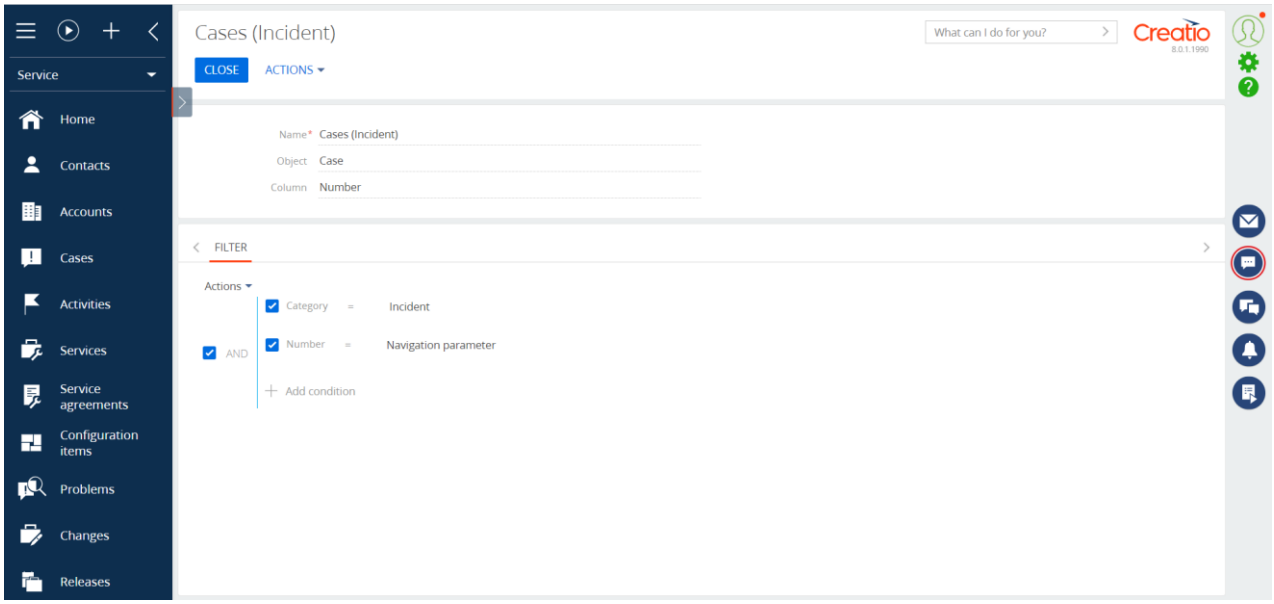


Guide to setup and utilization

23.08.2022

Product description

The **Custom URLs for Creatio** product is a solution that allows you to create good-looking links to records of system objects using no-code without any modifications or involvement of developers. Using this module, you can set up arbitrary user links for navigating the system and sending links through different communication channels. Configuration is performed in a separate convenient setup wizard.



The product can be used by companies in any industry or business area, since it offers universal functionality applicable to any system object.

Use cases

- Formation of a link to an order by number;
- Formation of a link to a request by number;
- Formation of a link to the product by code;

Opportunities

- Adding an unlimited number of settings;
- Display of non-standard links in sections;
- The action of copying the link to the record;
- Configuring record search to open by field or with advanced filtering;

Technical requirements

The product is compatible with all products on the Creatio platform version 7.16.0 and higher.

Product setup and installation

Product installation

To install packages, go to System Designer and select ‘Applications Hub’.

On the ‘Applications Hub’ page, click Choose from Marketplace, enter your booth address, and click Install.

If you are installing a product package from a file, you must request an up-to-date package from Sales’Up support. Next, on the ‘Applications Hub’ page, click "Install from file", specify the path to the archive with the package, and complete the installation.

Product preconfiguration

After installing the application, the system administrator needs to make changes to the site settings. Additional files can be requested by email care@salesup-it.com or download it via link ftp://salesupmarketplace@88.99.204.172

To turn the navigator on, you must:

1. Follow the link https://site-name.creatio.com/Navigation/SuNavigation.aspx?Product=Navigation , specifying the site name instead of "site-name".
2. Add the file SuNavigation.aspx to the folder [Path to the site]\Navigation
3. Put the assembly SalesUp.Navigation.dll in the folder [Path to the site]\bin

After completing the preconfiguration, proceed to the general settings.

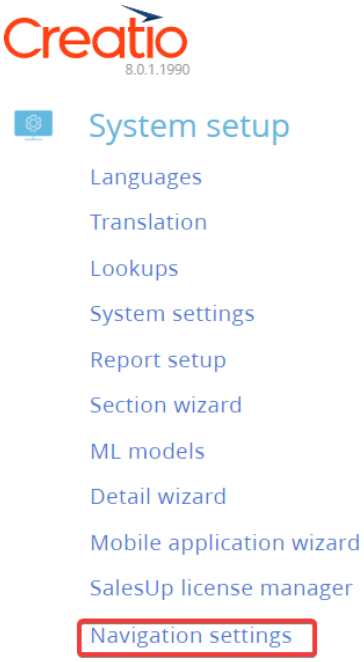
General settings

Creating a new setting

To add a new setting, you must:

Go to the "System Designer" section;

Select "Navigation settings";



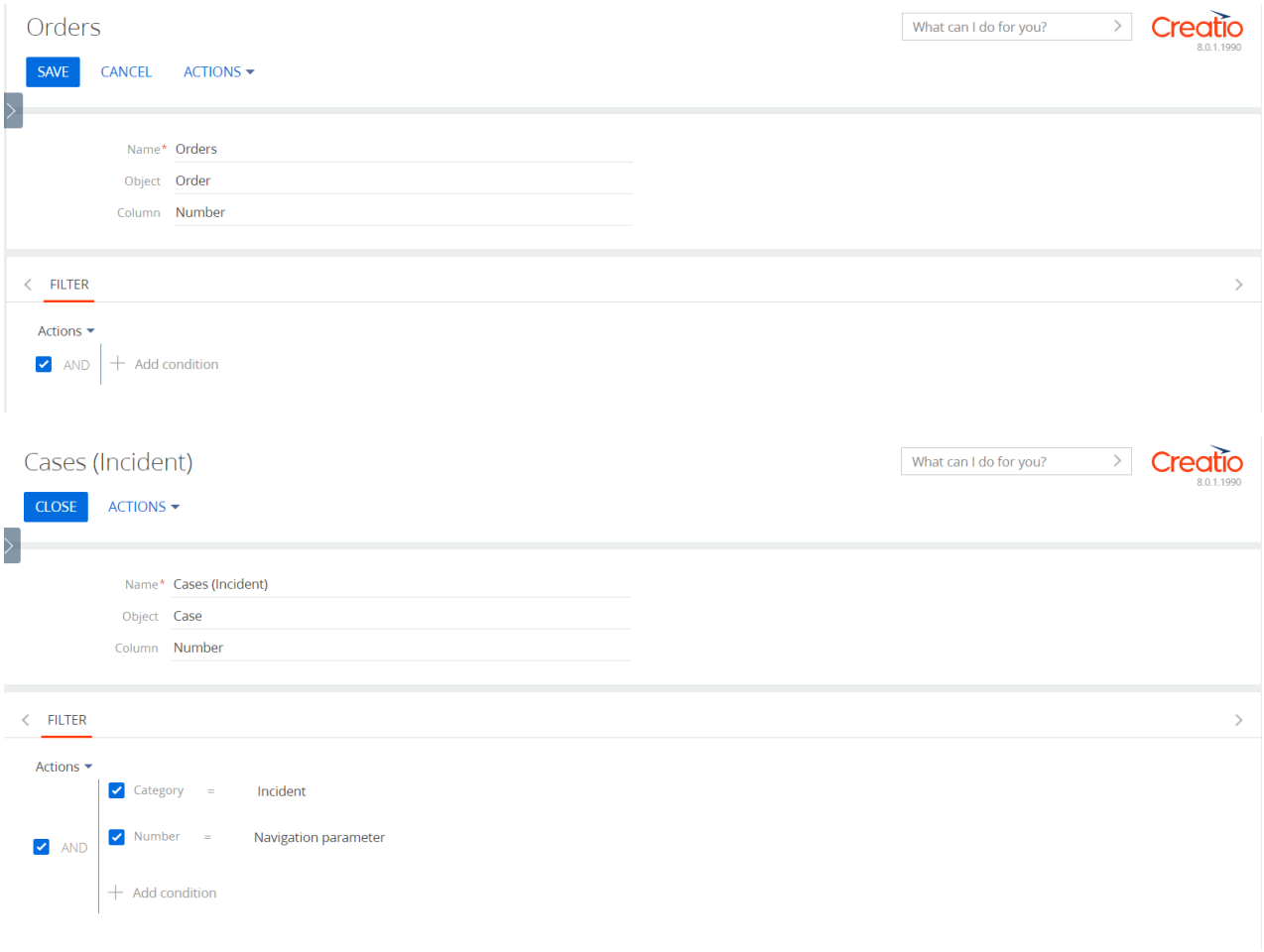
Press the "New" button;

The following fields must be filled in the record card:

- *Name* is a code from which the link will be formed. You must enter a unique name;
- *Object* is an object whose record will be opened when clicking on the link;

Additional settings (you must fill in one of the two):

- Column – object column, the value of which will be substituted into the link;
- Filter – a filter based on which the record will be searched when clicking on the link. In the filter, it is possible to specify a link with a navigation parameter, the value of which is specified in the link;



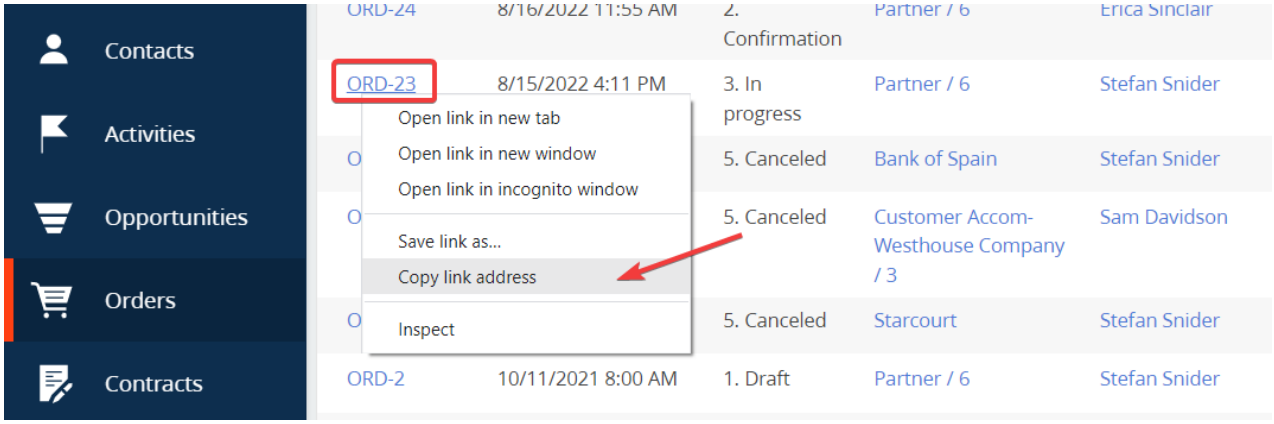
Editing an existing setting

To edit the settings, you must use the standard functionality of editing system objects.

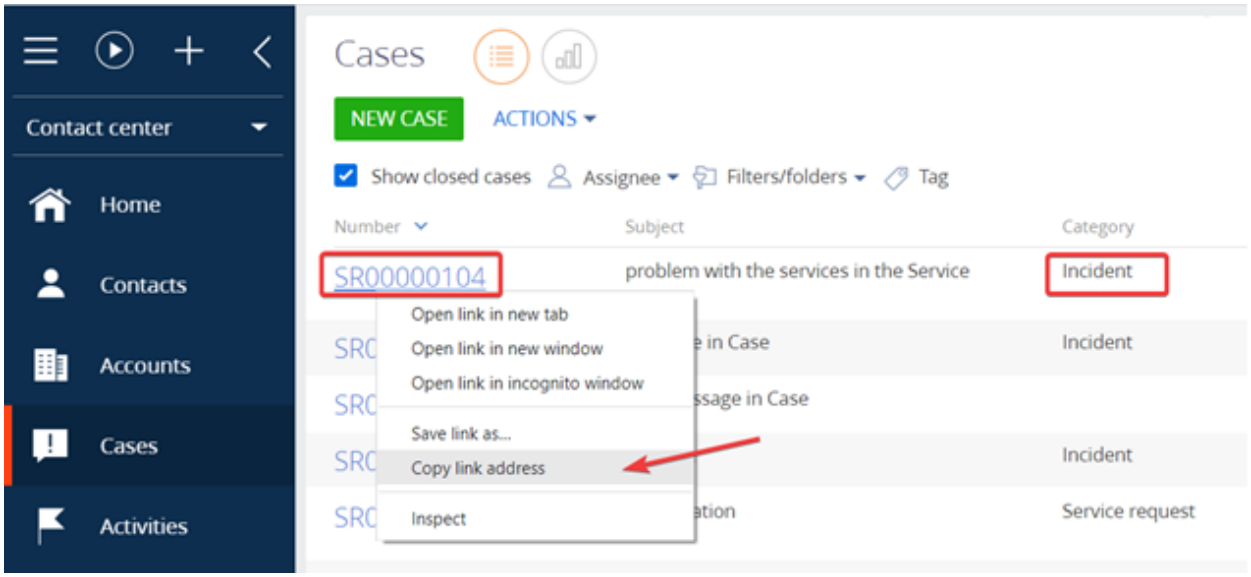
Utilization

After saving the setting, the link to the record of the configured object will not contain the record ID, but the configured value specified in the setting.

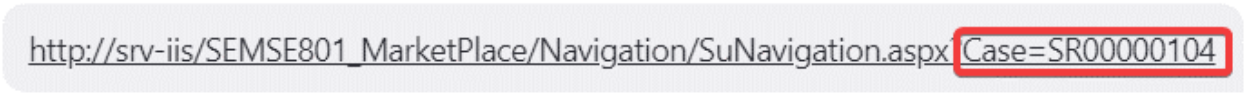
For example, an Order reference must contain an Order number, a Case reference with the Incident category must contain the Case number, and a Product reference must contain a Product Code.

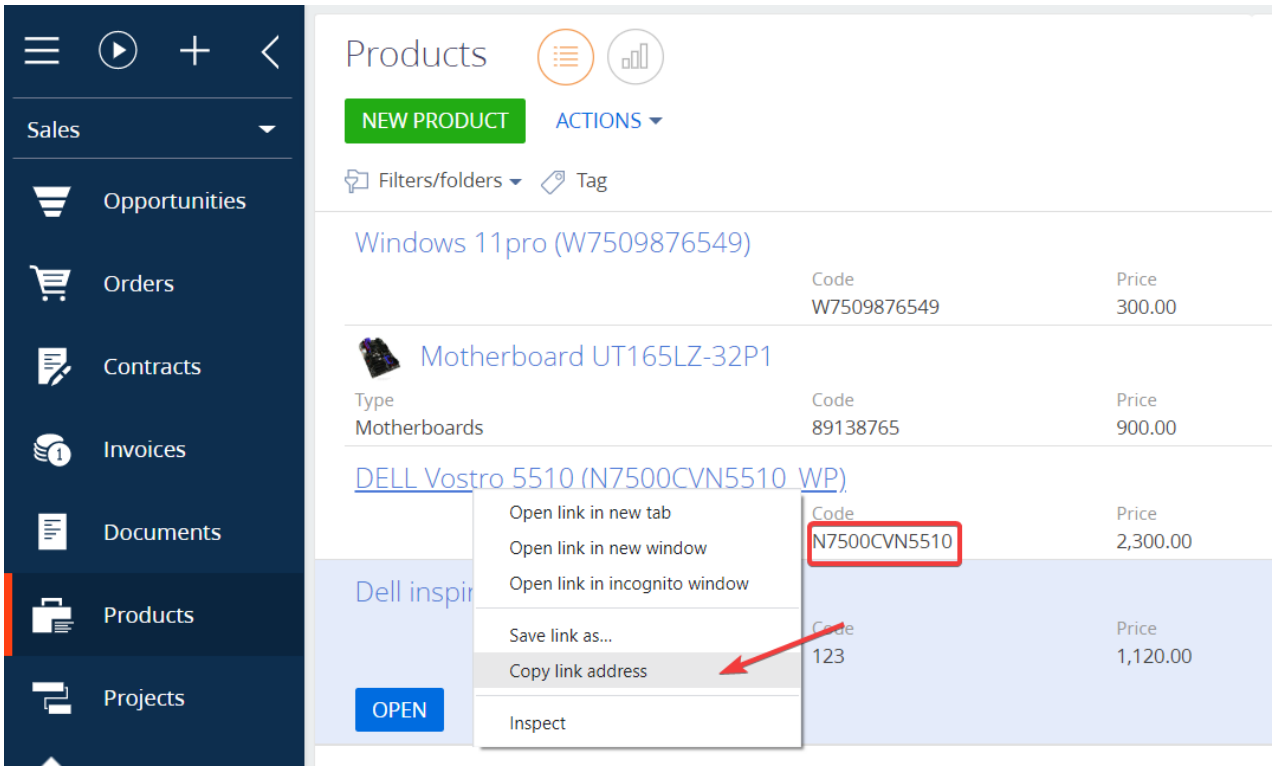


The result:



The result:





The result:

http://srv-iis/SEMSE801_MarketPlace/Navigation/SuNavigation.aspx?Product=N7500CVN5510

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