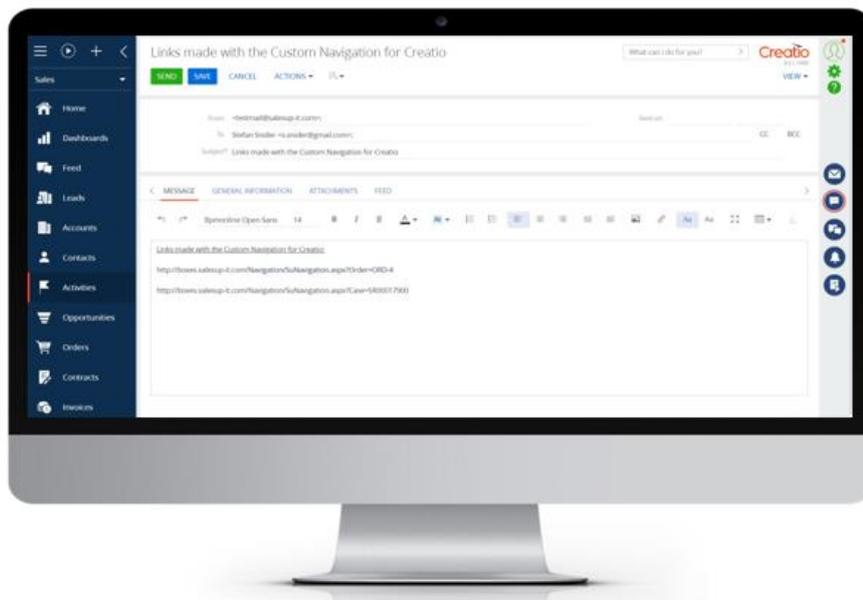




CUSTOM URLS FOR CREATIO

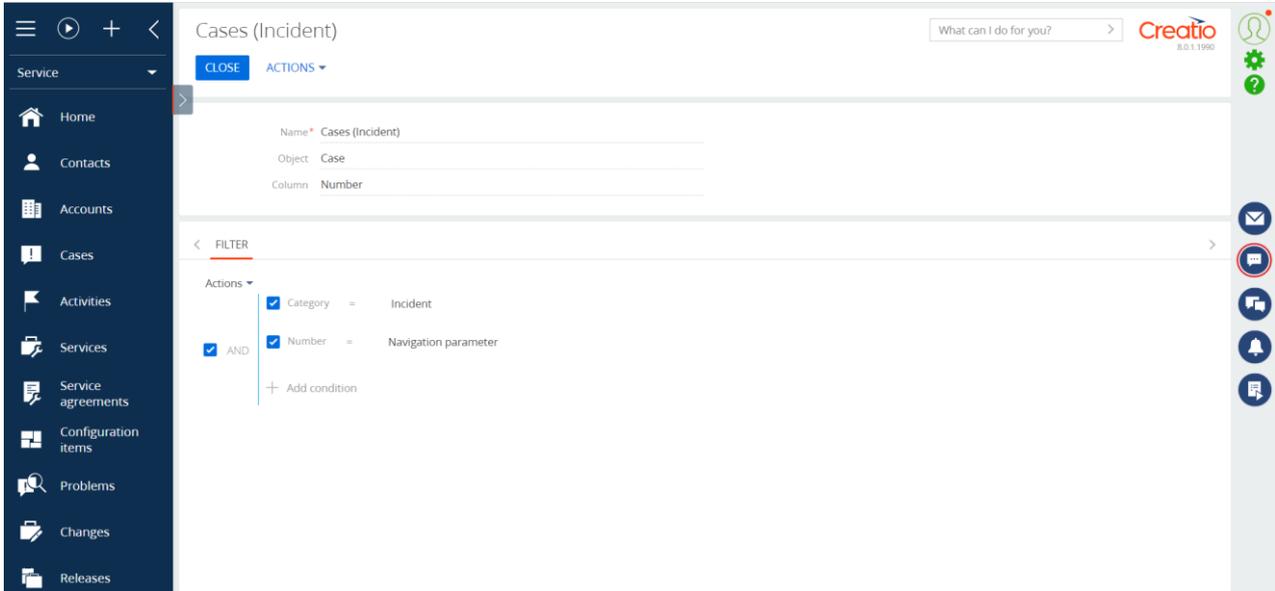


Guide to setup and utilization

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";



-  System setup
 - Languages
 - Translation
 - Lookups
 - System settings
 - Report setup
 - Section wizard
 - ML models
 - Detail wizard
 - Mobile application wizard
 - SalesUp license manager
 - Navigation settings**

Press the "New" button;

Navigation settings What can I do for you? >  8.0.1.1990 VIEW ▾

NEW ACTIONS ▾

 Filters/folders ▾

| Name | Object | Column |
|----------------------|----------|---------|
| Completed activities | Activity | Subject |
| Cases (Incident) | Case | Number |
| Orders | Order | Number |
| Incident Cases | Case | Number |
| Products code | Product | Code |

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;

The image shows two screenshots of the Creatio system interface. The top screenshot is for the 'Orders' record card. It has a header with 'Orders' on the left, a search bar 'What can I do for you?' in the middle, and the 'Creatio 8.0.1.1990' logo on the right. Below the header are buttons for 'SAVE', 'CANCEL', and 'ACTIONS'. The main area contains three input fields: 'Name*' with the value 'Orders', 'Object' with the value 'Order', and 'Column' with the value 'Number'. Below this is a 'FILTER' section with a left arrow, the word 'FILTER', and a right arrow. Under 'Actions', there is a checked 'AND' button and a '+ Add condition' link. The bottom screenshot is for the 'Cases (Incident)' record card. It has a header with 'Cases (Incident)' on the left, a search bar 'What can I do for you?' in the middle, and the 'Creatio 8.0.1.1990' logo on the right. Below the header are buttons for 'CLOSE' and 'ACTIONS'. The main area contains three input fields: 'Name*' with the value 'Cases (Incident)', 'Object' with the value 'Case', and 'Column' with the value 'Number'. Below this is a 'FILTER' section with a left arrow, the word 'FILTER', and a right arrow. Under 'Actions', there are two checked conditions: 'Category = Incident' and 'Number = Navigation parameter'. There is also a checked 'AND' button and a '+ Add condition' link.

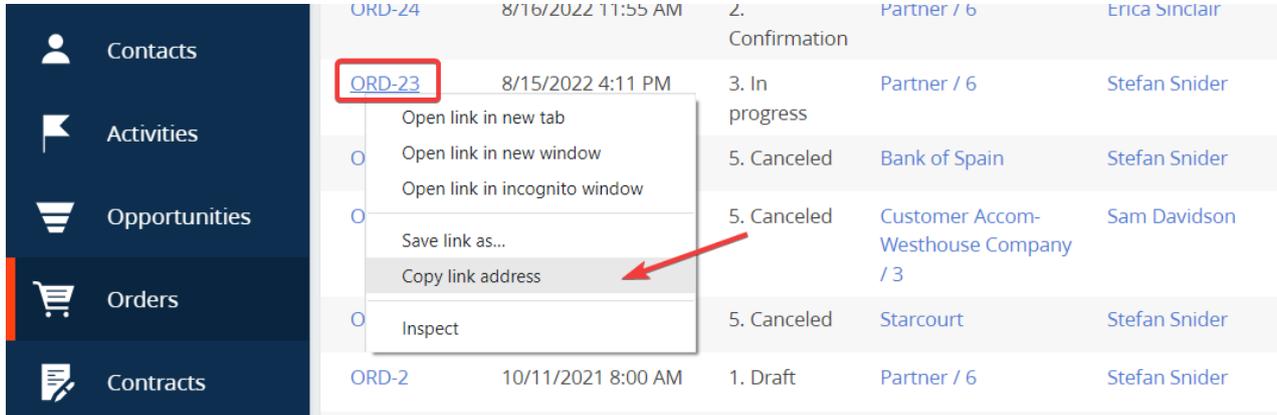
Editing an existing setting

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.

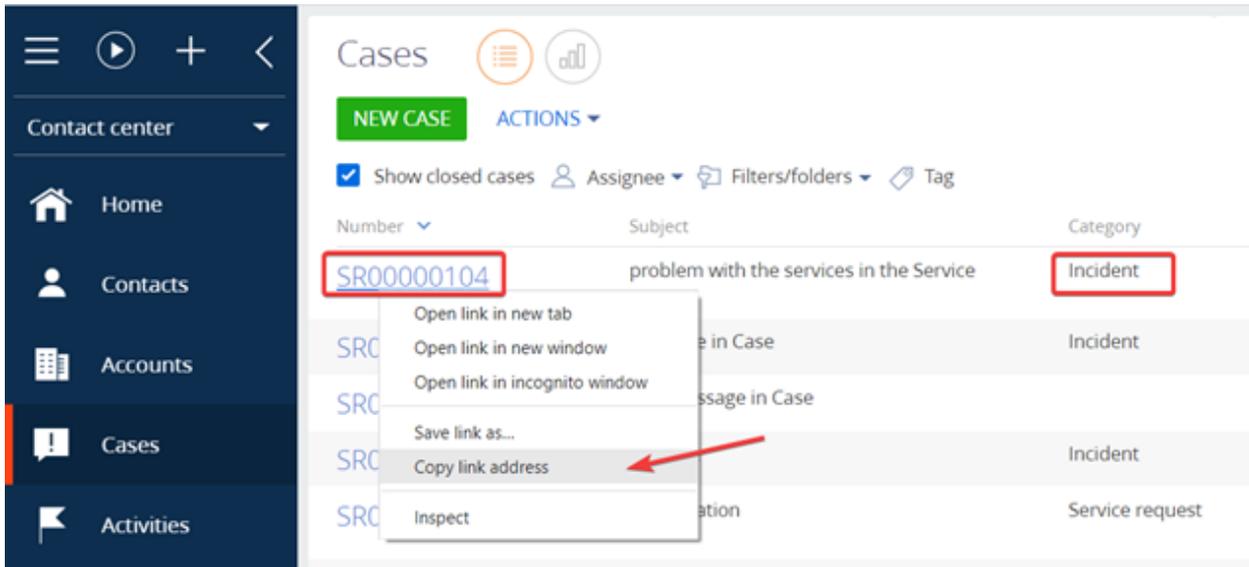
For example, an Order reference must contain an Order number, a Case reference with the Incident category must contain the Case number, and a Product reference must contain a Product Code.



| Order ID | Date/Time | Status | Partner | Assigned To |
|---------------|--------------------|-----------------|--|----------------|
| ORD-24 | 8/16/2022 11:55 AM | 2. Confirmation | Partner / 6 | Erica Sinclair |
| ORD-23 | 8/15/2022 4:11 PM | 3. In progress | Partner / 6 | Stefan Snider |
| O | | 5. Canceled | Bank of Spain | Stefan Snider |
| O | | 5. Canceled | Customer Accom- Westhouse Company / 3 | Sam Davidson |
| O | | 5. Canceled | Starcourt | Stefan Snider |
| ORD-2 | 10/11/2021 8:00 AM | 1. Draft | Partner / 6 | Stefan Snider |

The result:

http://srv-iis/SEMSE801_MarketPlace/Navigation/SuNavigation.aspx?Order=ORD-23



| Case Number | Subject | Category |
|-------------------|--|-----------------|
| SR00000104 | problem with the services in the Service | Incident |
| SRC | e in Case | Incident |
| SRC | essage in Case | Incident |
| SRC | ation | Service request |

The result:

http://srv-iis/SEMSE801_MarketPlace/Navigation/SuNavigation.aspx?Case=SR00000104

Products  

NEW PRODUCT ACTIONS ▾

Filters/folders ▾ Tag

Windows 11pro (W7509876549)

| | Code | Price |
|--|-------------|--------|
| | W7509876549 | 300.00 |

 **Motherboard UT165LZ-32P1**

| Type | Code | Price |
|--------------|----------|--------|
| Motherboards | 89138765 | 900.00 |

DELL Vostro 5510 (N7500CVN5510 WP)

| | Code | Price |
|--|---------------------|----------|
| | N7500CVN5510 | 2,300.00 |
| | 123 | 1,120.00 |

Context menu options: Open link in new tab, Open link in new window, Open link in incognito window, Save link as..., Copy link address (highlighted with red arrow), Inspect

OPEN

The result:

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

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