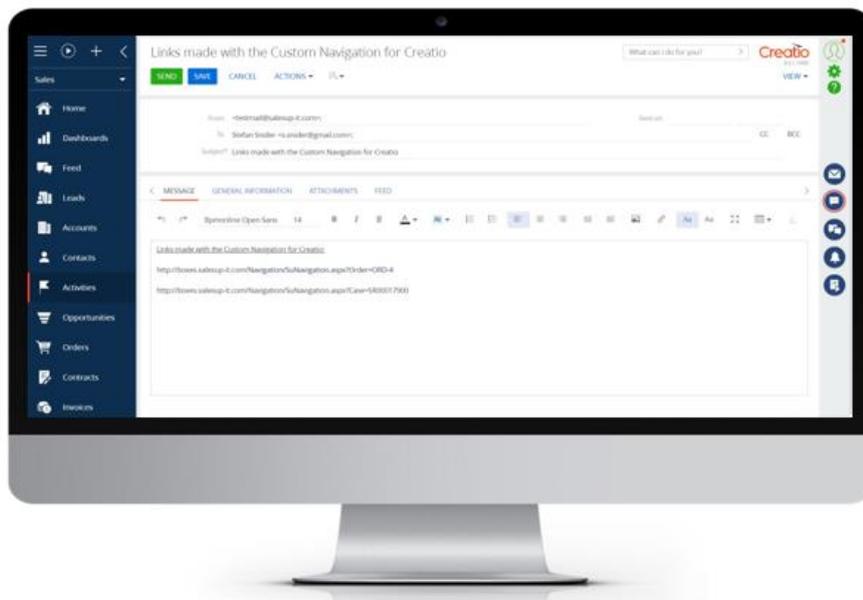




# CUSTOM URLS FOR CREATIO

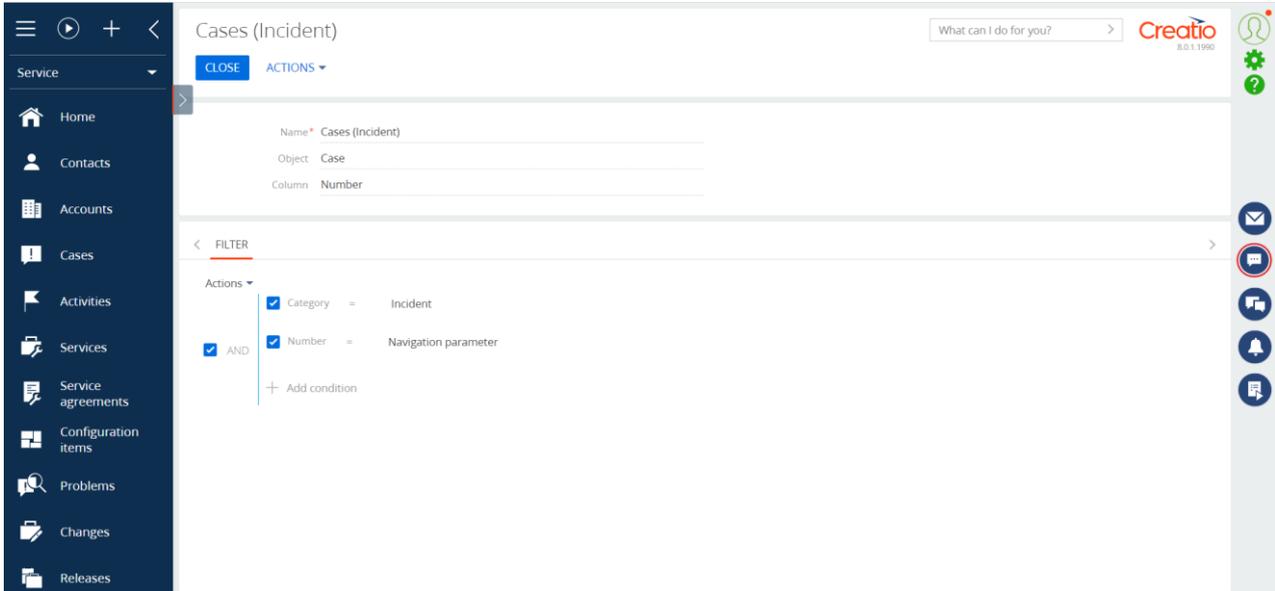


Guide to setup and utilization

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](mailto: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 title 'Orders' and a search bar 'What can I do for you?'. Below the title 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 dropdown menu for 'Actions' set to 'AND' and a '+ Add condition' button. The bottom screenshot is for the 'Cases (Incident)' record card. It has a title 'Cases (Incident)' and the same search bar. Below the title 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 dropdown menu for 'Actions' set to 'AND'. It shows two conditions: 'Category = Incident' and 'Number = Navigation parameter', with a '+ Add condition' button.

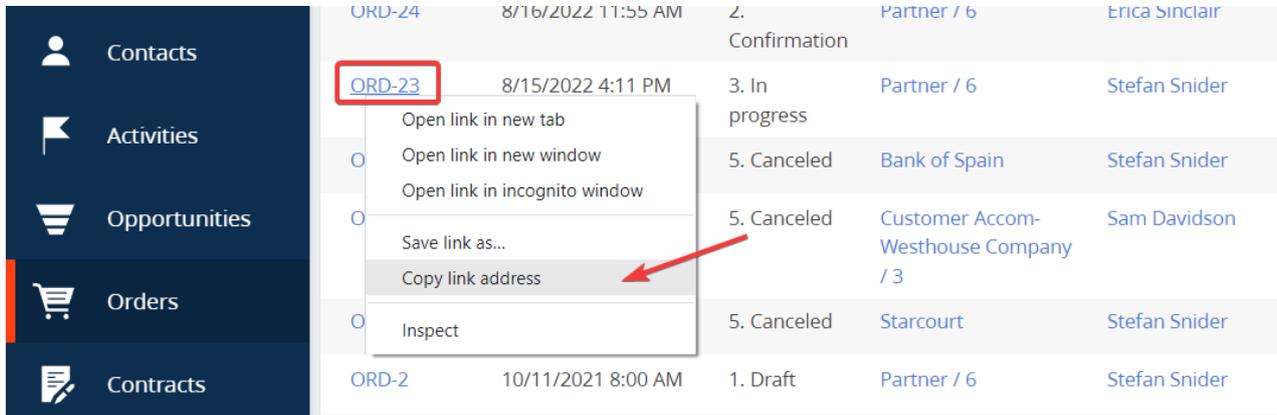
## Editing an existing setting

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.

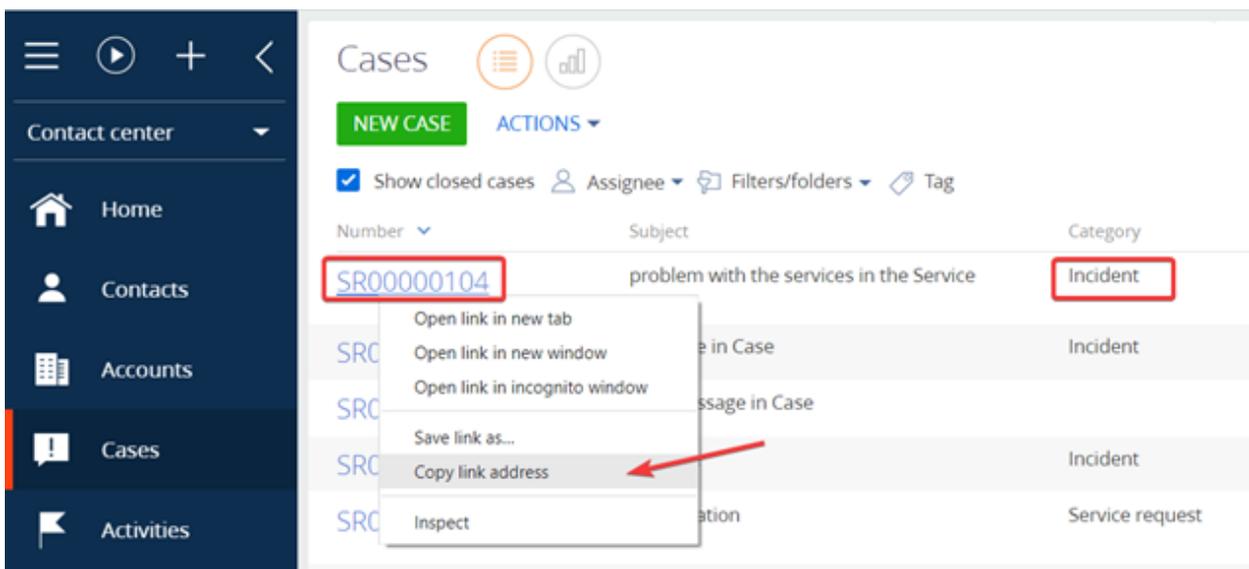
For example, an Order reference must contain an Order number, a Case reference with the Incident category must contain the Case number, and a Product reference must contain a Product Code.



Order ID	Date/Time	Status	Partner	Assigned To
ORD-24	8/16/2022 11:55 AM	2. Confirmation	Partner / 6	Erica Sinclair
<b>ORD-23</b>	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](http://srv-iis/SEMSE801_MarketPlace/Navigation/SuNavigation.aspx?Order=ORD-23)



Case Number	Subject	Category
<b>SR00000104</b>	problem with the services in the Service	<b>Incident</b>
SRC	e in Case	Incident
SRC	essage in Case	Incident
SRC		Incident
SRC	ation	Service request

The result:

[http://srv-iis/SEMSE801\\_MarketPlace/Navigation/SuNavigation.aspx?Case=SR00000104](http://srv-iis/SEMSE801_MarketPlace/Navigation/SuNavigation.aspx?Case=SR00000104)

Products  

**NEW PRODUCT** ACTIONS ▾

Filters/folders ▾ Tag

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Windows 11pro (W7509876549)

	Code	Price
	W7509876549	300.00

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 **Motherboard UT165LZ-32P1**

Type	Code	Price
Motherboards	89138765	900.00

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DELL Vostro 5510 (N7500CVN5510 WP)

	Code	Price
	<b>N7500CVN5510</b>	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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