Installation and setup

Installing the application has a standard procedure:

Install	Packages	
Domain*		
	Install	
	IIIstali	
By submitting this your personal data page, the <u>Public Of</u> on the App's page.	form, you confirm that you a with the App developer spe <u>fer Agreement</u> , and the rele	agree with sharing cified on the App's vant T&C published

To install the application, paste your link to the website and click Install.

After installing the application, it is advisable to run the full generation and compilation.

Getting started with visualizing organizational structures.

• After logging into CRM, select the <u>'Organization Structure Visualization' section</u>.



• Go to the section labeled 'Organization Structure':

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Organization structure						
📀 Workday tracker						
🔰 База знань	Rounce					
🛅 Бібліотека процесів	Finance, Managers group					
Ф Веб-сервіси						
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• The section has two buttons "All Employees" and "External Users"

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👸 Бібліотека процесів	Finance. Managers group					
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All Employees

• Clicking on "All Employees" will display the departments and data of all employees of the company who are logged into the Creatio system.

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Organization structure	
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Бібліотека процесів Finance. Managers group	
Б Веб-сервіси	
Вебхуки	

• The 'All Employees' block has an arrow near it. When you click on it, you can collapse/expand the company structure.

Всі програми 👻	Organization structure External users
Q Пошук застосунку	
GenTestSection	All employees
Organization structure	
📀 Workday tracker	
🚺 База знань	Prance
Бібліотека процесів	Finance. Managers group
Веб-сервіси	
🚴 Вебхуки	

• Hover your mouse over the user icon to obtain detailed information about a specific employee.

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Всі програми - Q Пошук застосунку	Organization structure All employees	Exte	'nal use	¢2
GenTestSection	All employees			
Organization structure	Rocque: Sales Department Manager Email: contact@euroompany.com			
Orkday tracker	Korrparent: Qur company			
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🛅 Бібліотека процесів	Finance. Managers group			
🙆 Веб-сервіси				
🚴 Вебхуки				

• Click on either the counterparty name or the full name of the employee for more information



• Clicking on the counterparty's name will redirect you to the Counterparty's card



• The contact window opens by clicking on the user's name similarly



External Users

• Select External Users



• Clicking on the "External Users" button opens the organizational structure of external users (partners, customers, etc.)

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- The possibilities are the same as those in All Employees' organizational structure.
 - 1 ability to collapse/expand the organizational structure

2— the ability to select the desired user with reference to the counterparty/contact card

	Почати день	::	.	?	٥	s
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Configure access rights

The application is available to Studio portal administrators by default

• Access can be granted to other users by visiting the system designer.



• Select Workplace Settings



- To share the section with others, click:
- 1. Add New User Workplace
- 2. Select General

::: Creatio 🕨 +	Q Search_	Start day	# 4 6
All apps 🔹 👻	Workplace setup		
Q Search app	NEW USER WORKPLACE +		
Accounts	General	Туре	Application client type
	Portal	General	Browser
	Sales	General	Browser
Ad campaigns	Portal	Portal	Browser
Agent desisten	Service	General	Browser
Agent desktop	Marketing	General	Browser
	Contact center	General	Browser
Agent homepage	My applications	General	Browser
	Self-service	Portal	Browser
📋 Calendar	Studio	General	Browser
	Digital ads	General	Browser
Calls	Customer 360	General	Browser

• Enter the name of the workplace

New record SAVE CANCEL		2 19
User's workplace		
Name*Use only in shell	Home page	• o
< WORKPLACE SETUP		>
🛛 Sections + i 🚱		
	No data	
🗖 Usergroups 🕂 : 🚱	No data	

- After that, select the partition that you want.
- 1. Add partition via "+"
- 2. Select the "Organization Structure" section
- 3. Click on the Select button

+ Q Search	Select: Section
Organization structure SAVE CANCEL	SELECT CANCEL ACTIONS ~ Records selected: Title SEARCH Mobile synchronization settings Opportunities
Name [•] Organization structure Use only in shell	Copportunities Crders Corders Corders Corders PRMPortalPage
top < WORKPLACE SETUP epage Sections + : 🍫	Process library Process log Products Products Queues Scoring models

- After that, select which users will have access to the "Organization Structure" section:
- 1. Through "+" select user group
- 2. In the list, select the users who want to see the section. For example, Finance. Managers group
- 3. Click Select



• Select a home page — Organization structure list page

•	Organization structure	
ch app	SAVE CANCEL	
counts	Name [®] Organization structure Home page	Organization structure list page 🗾 🖸 👩
campaigns	Use only in shell	Organization structure form page
		Organization structure list page
ent desktop	< WORKPLACE SETUP	Workday tracker form page
ent homepage	🛛 Sections + : 📀	Workday tracker list page
	Organization structure	GenTestSection form page
lendar	🛛 User groups + 🗄 🚱	Webhooks log
lls	Finance. Managers group	Webhooks list page
		Webhooks form page
mpaigns		Base form for OpenId provider
ses		Web forms and pages

• In the last step, save your changes.



After making changes in the settings, it is necessary to re-authorize the system for those users for whom the changes were made.

Thus, the departments you choose will see a section of the organizational structure of your company.

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