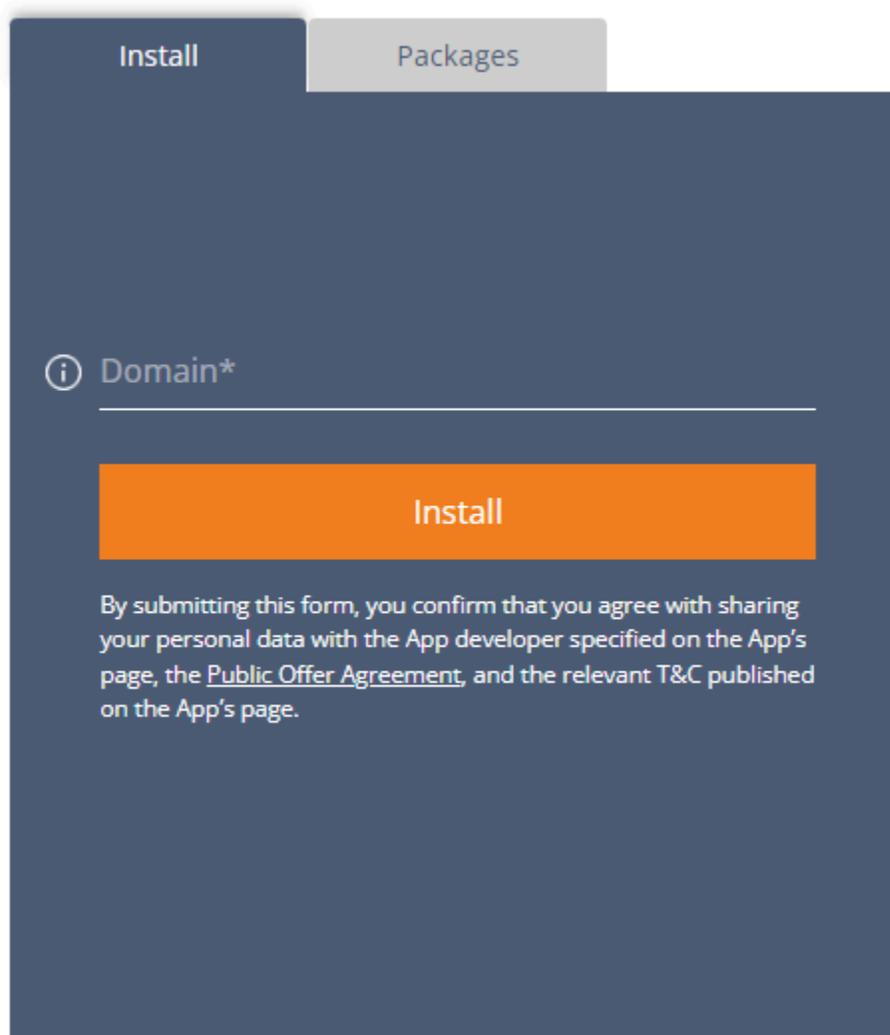


Installation and setup

Installing the application has a standard procedure:



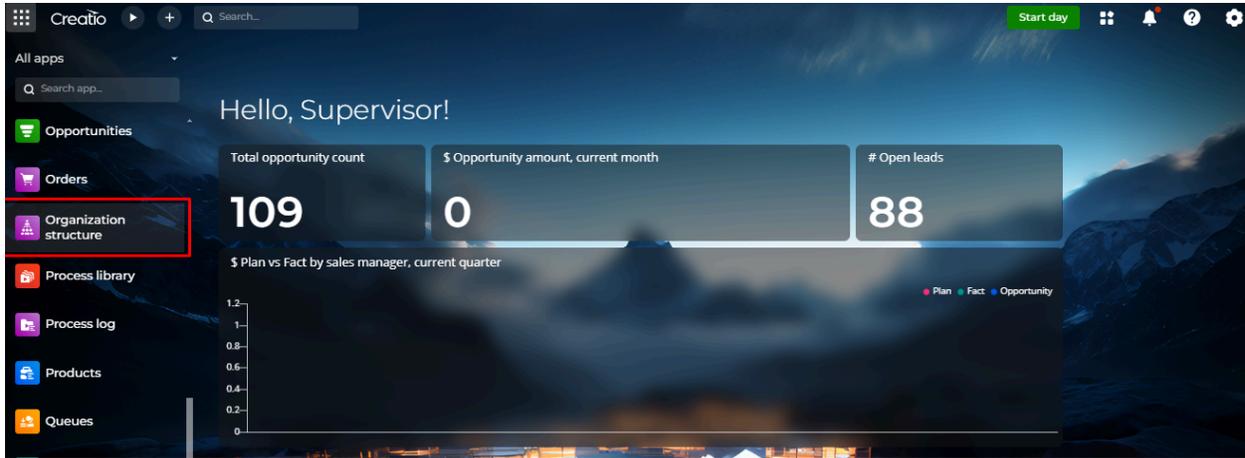
The screenshot shows a dark blue interface with two tabs at the top: 'Install' (active) and 'Packages'. Below the tabs is a form with a label 'Domain*' and an information icon. A large orange button labeled 'Install' is centered below the form. Below the button is a paragraph of text: 'By submitting this form, you confirm that you agree with sharing your personal data with the App developer specified on the App's page, the [Public Offer Agreement](#), and the relevant T&C published on the App's page.'

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.

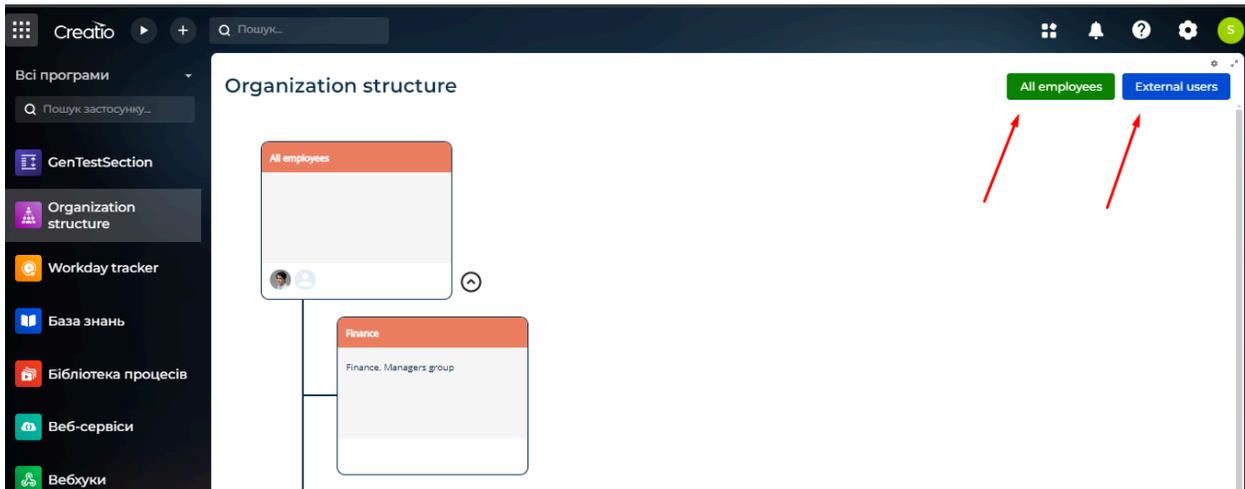
- After logging into CRM, select the 'Organization Structure Visualization' section.



- Go to the section labeled 'Organization Structure':

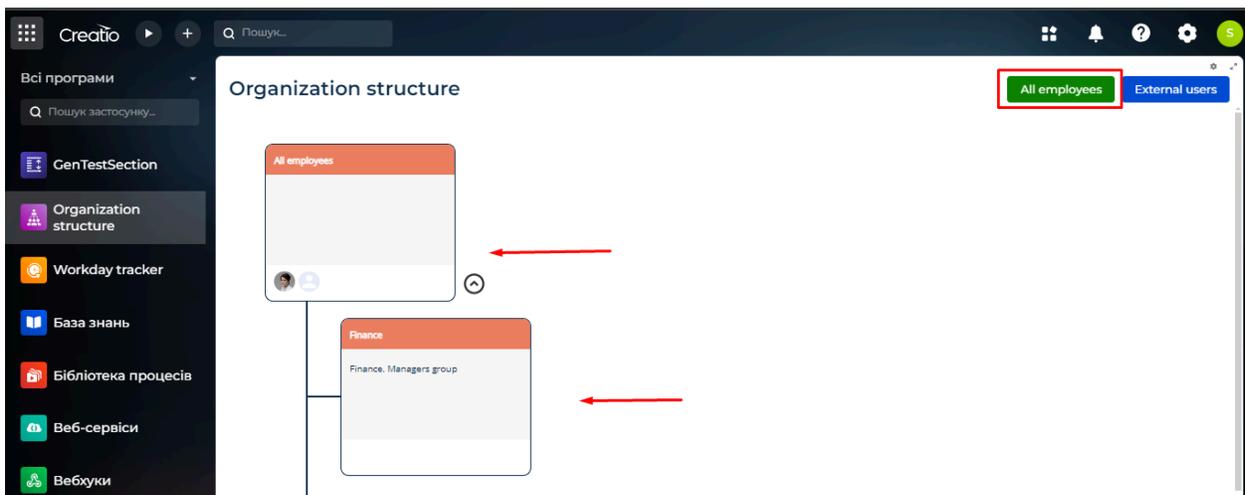


- The section has two buttons "All Employees" and "External Users"

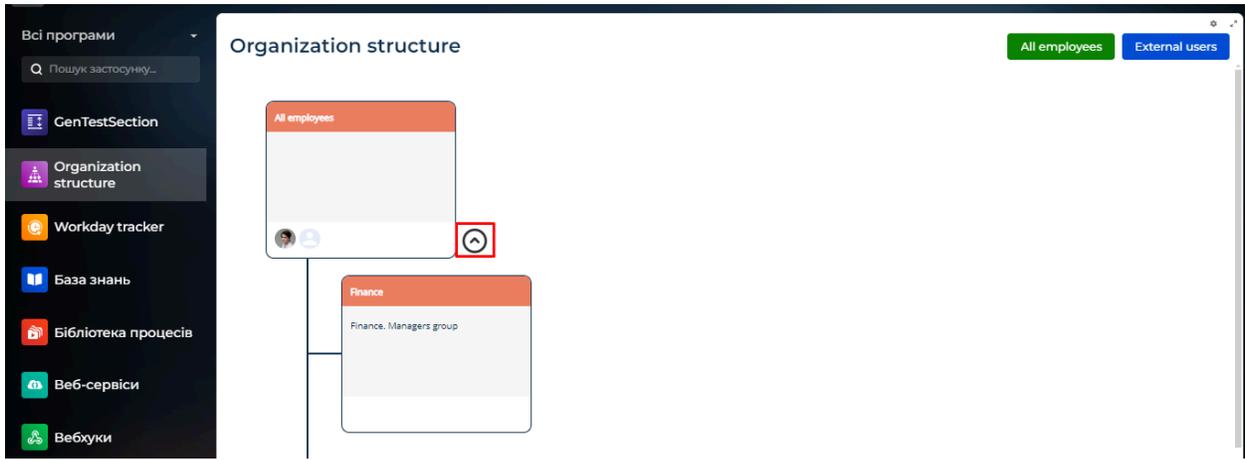


All Employees

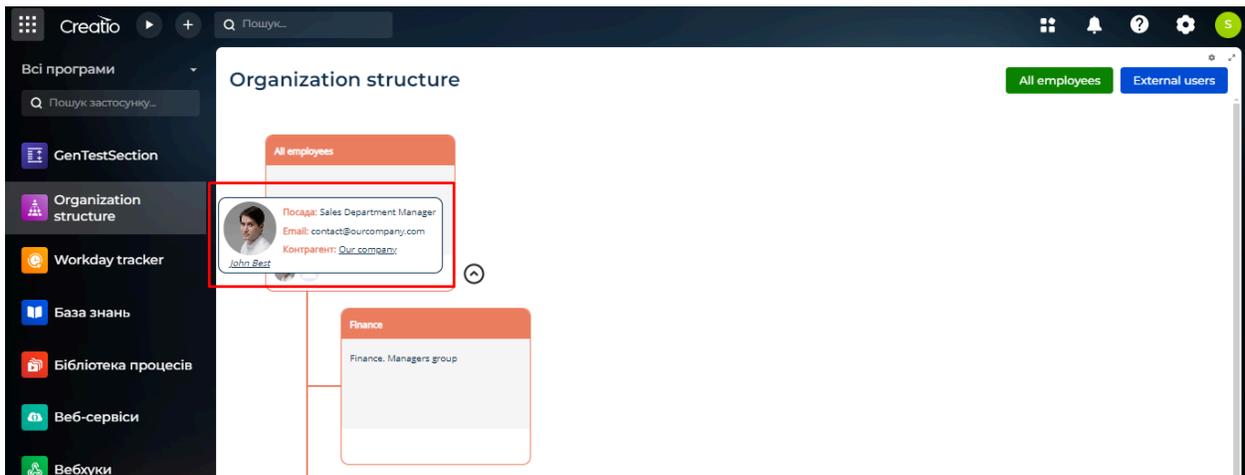
- Clicking on "All Employees" will display the departments and data of all employees of the company who are logged into the Creatio system.



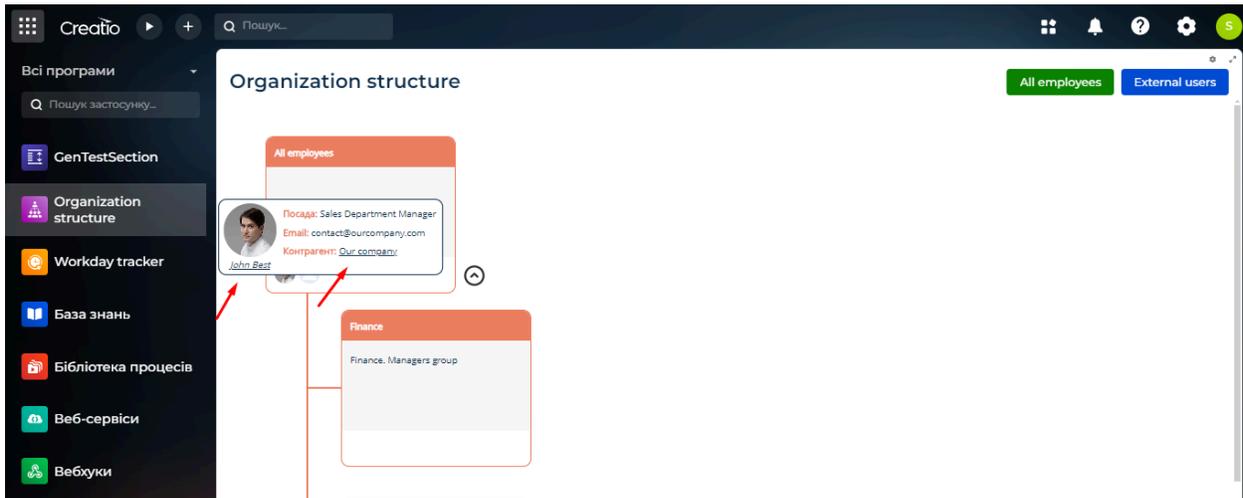
- The 'All Employees' block has an arrow near it. When you click on it, you can collapse/expand the company structure.



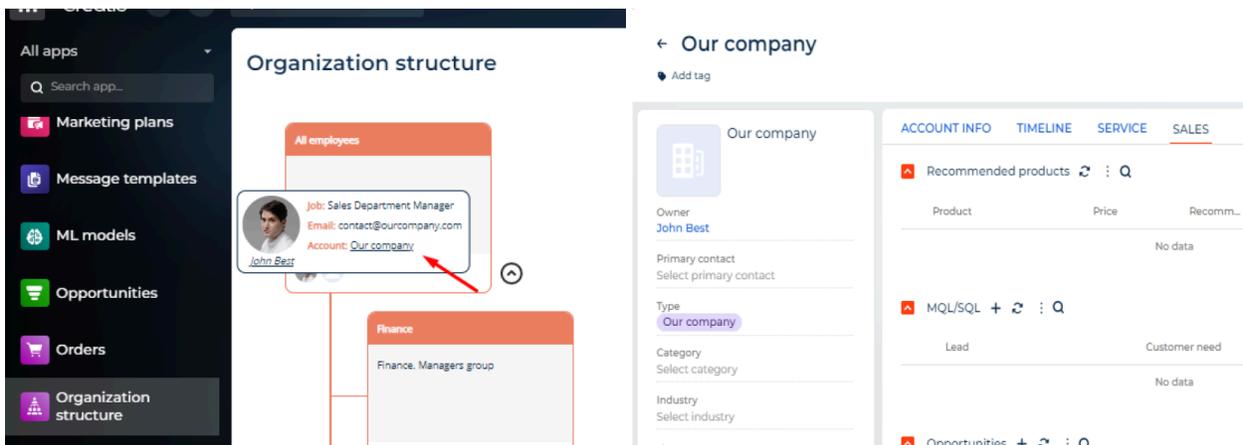
- Hover your mouse over the user icon to obtain detailed information about a specific employee.



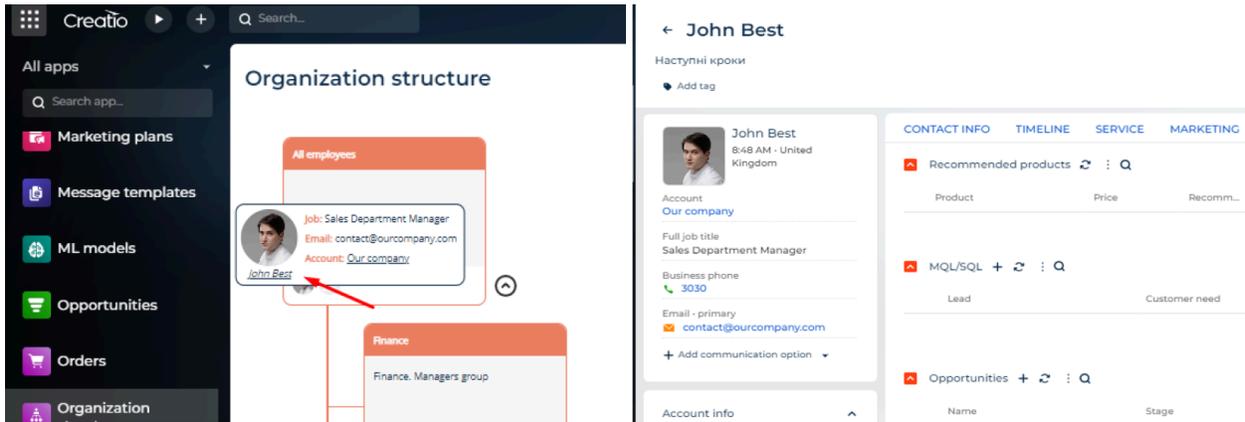
- Click on either the counterparty name or the full name of the employee for more information



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

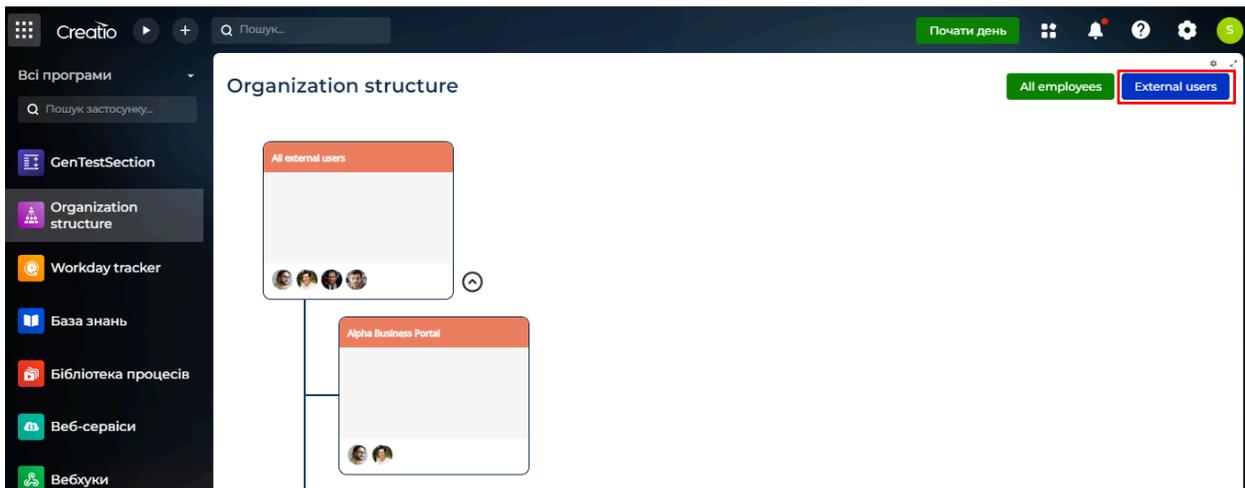


- The contact window opens by clicking on the user's name similarly



External Users

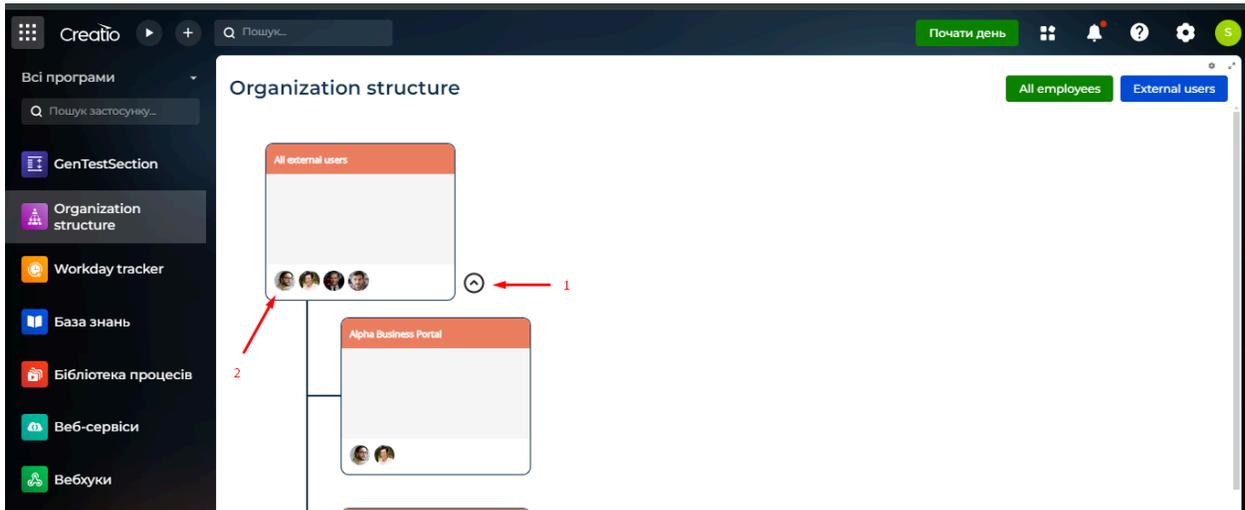
- Select External Users



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



- 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



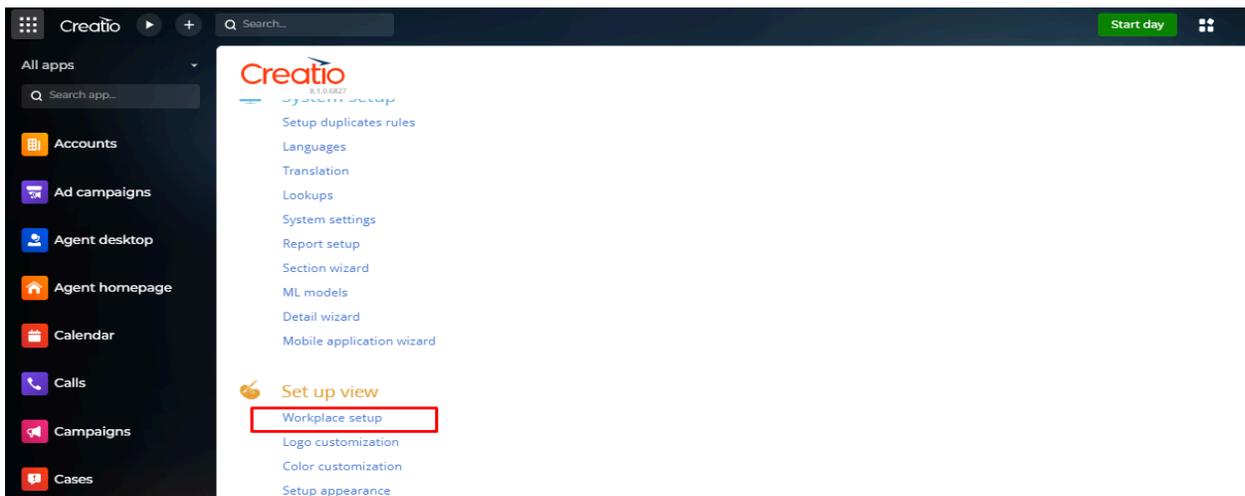
Configure access rights

The application is available to Studio portal administrators by default

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



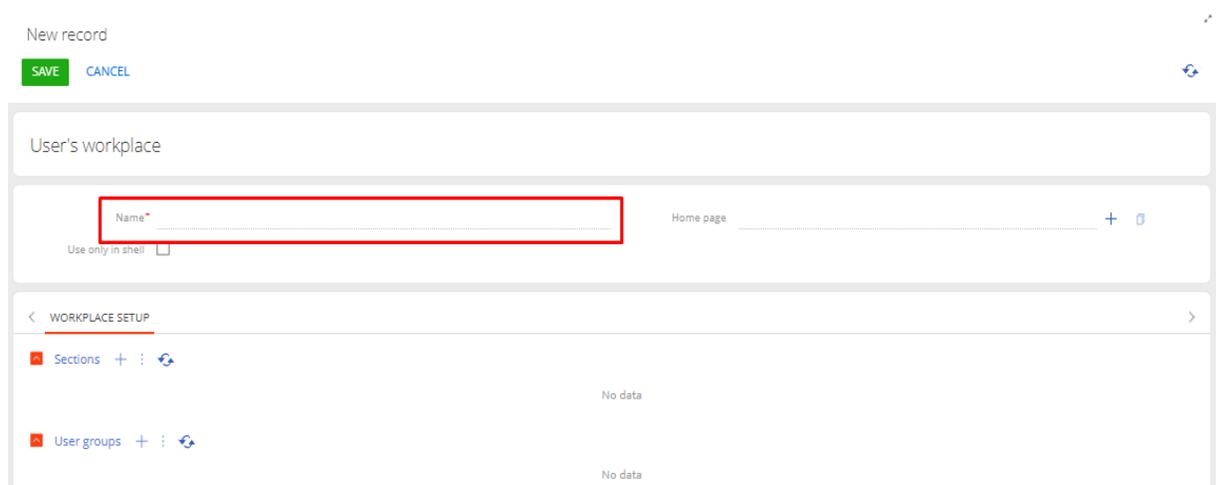
- Select Workplace Settings



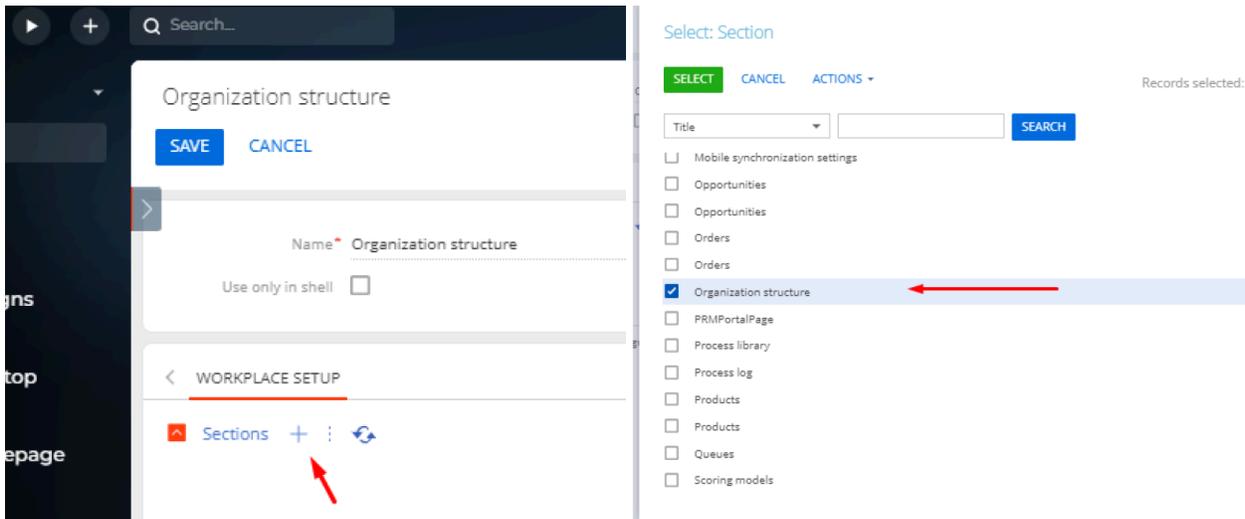
- To share the section with others, click:
 1. Add New User Workplace
 2. Select General



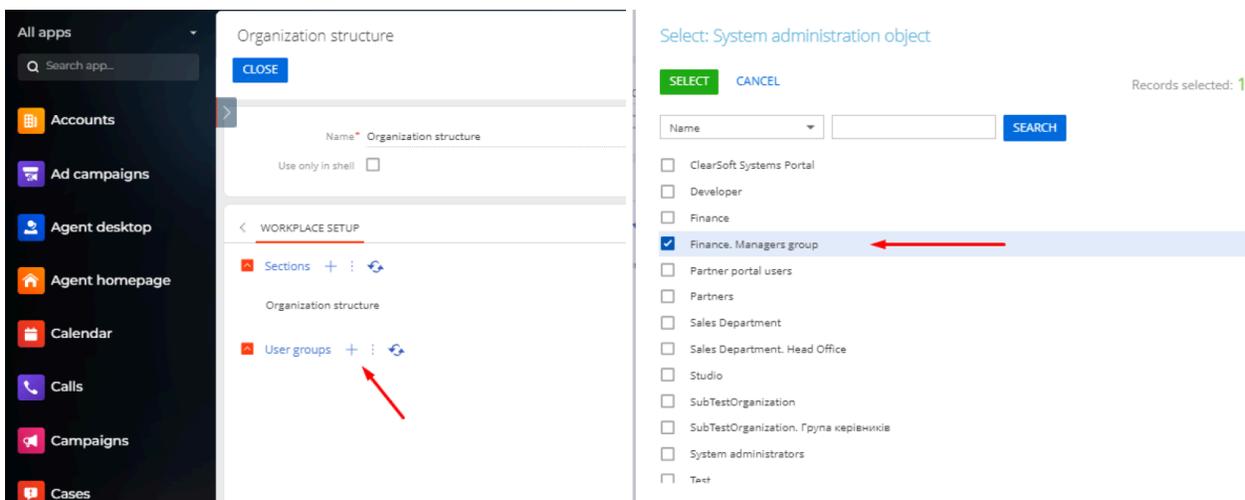
- Enter the name of the workplace



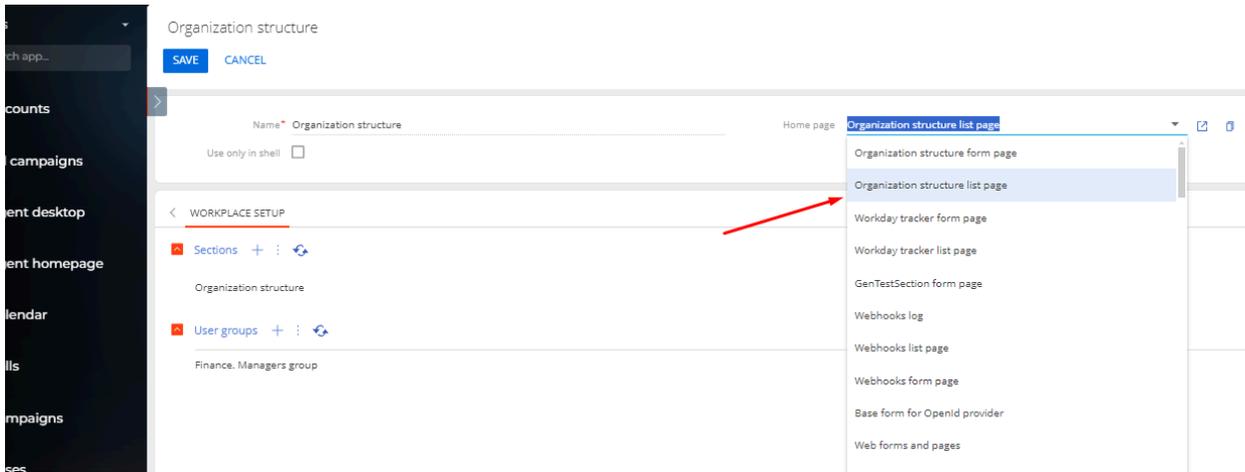
- After that, select the partition that you want.
 1. Add partition via “+”
 2. Select the “Organization Structure” section
 3. Click on the Select button



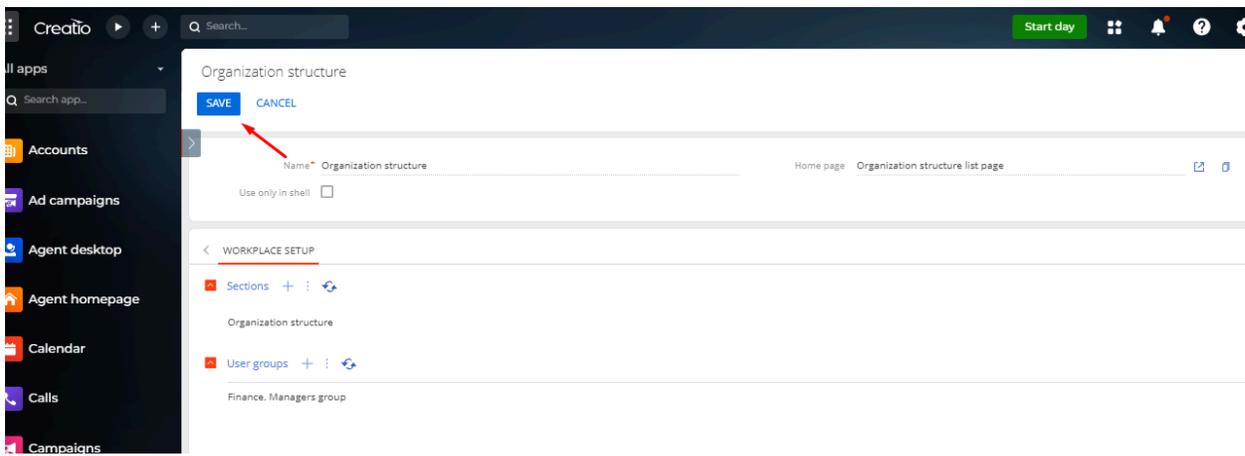
- After that, select which users will have access to the “Organization Structure” section:
 1. Through “+” select user group
 2. In the list, select the users who want to see the section. For example, Finance. Managers group
 3. Click Select



- Select a home page — Organization structure list page



- 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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