Installation and setup

Installing the Workday Tracker app has a standard procedure:

	Install	Packages	
()	Domain*		
		Install	
	By submitting this your personal data page, the <u>Public Of</u> on the App's page.	form, you confirm that you ag with the App developer speci <u>fer Agreement</u> , and the releva	ree with sharing fied on the App's int T&C published

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

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

Getting started with the Workday Tracker app

For the users:

• At the beginning of the working day after logging in to CRM, click the "Start day" button



• If your workday consists of several segments, you will see the following notification after clicking the Start Day button:

III Creatio 🕨 🕂	Q Search		Start da	:	.	0	٥
All apps 🗸 🗸							
Q Search app	Lalla Cupanyisar						
	Hello, Supervisor						
n Service nomepage	Total opportunity count			-			
Services	100	0	00				
Studio homepage	109		00				
System settings	\$ Plan vs Fact by sales manager, current 1.2-	t que You already have a closed record for this day. Want to create a new one or re-open the old?	e Plan e Fact e Opportunity				
System users		Re-open Create new					
Tasks	0.6 0.4 0.2		-20-				

- When you click on the "Re-open" button, you will continue your previous working time record.
- By clicking on the "Create new" button, you will start a new working day.

• When you click the Start Day button, if your working day does not consist of several segments, you will receive the following notification:

III Creatio 🕨 +	Q Search		End da	y #	.	0	٥
All apps 🗸							
Q Search app_							
	Hello, Supervis	or!					
Service homepage	Total opportunity count	\$ Opportunity amount, current month	# Open leads				
Services	109	0	88				
Studio homepage	\$ Plan vs Fact by sales manager, o	current qu art					
System settings		The day is successfully started!	Plan Fact Opportunity				
System users	0.8-	CLOSE					
Tasks	0.6						
III Management	0.2-0						

• Similarly, when your working day is over, when you click the "End Day" button, you will receive the following notification:

III Creatio 🕨 + 🗅	Search	and the second	Start da	, ::	.	?	٥
All apps 🗸							
Q Search app	Hello, Superviso	r!					
Service homepage	Total opportunity count	\$ Opportunity amount, current month	# Open leads				
Services	109	0	88				
Studio homepage							
System settings	\$ Plan vs Fact by sales manager, cur 1.2 1	rrent quart The day is successfully ended!	Plan 🔹 Fact 🔹 Opportunity				
System users	1	CLOSE					
Tasks	0.4-						
[UI Management	e let ug						

For executives:

• To go to the Workday Tracker section, click on the corresponding section in CRM:

	109	0	00	
	\$ Plan vs Fact by sales m	hanager, current quarter		
Documents	12-		Plan e Fact e Opp	ortunity
Products	0.8-			
Knowledge base	0.6 0.4 0.2			
Forecasts	0			
Copportunities				
Chat				
O Workday tracker				•

• In this section, you will see all the records of your employees' working hours:

III Creatio 🕨 +	Q Search					Start day	::	. 9	٥	S
Sales -	Workday tracker	r					+ New	± Import	.	• 2
Q Search app	🖿 Folders 🛛 🗣 👻 Tag filter						Q Search			г
Orders	Created on	Created by	Start date 👻	Duration,	Due date	Created on			+	1
Olders	09.07.2024 11:12	Supervisor	09.07.2024 11:12	0.93	09.07.2024 11:13	09.07.2024 11:12				
Contracts	09.07.2024 11:10	Supervisor	09.07.2024 11:10	0.06	09.07.2024 11:10	09.07.2024 11:10				
	03.07.2024 11:57	Supervisor	03.07.2024 11:57	131.63	03.07.2024 16:56	03.07.2024 11:57				
moles	03.07.2024 10:10	Supervisor	03.07.2024 10:10	78.75	03.07.2024 11:56	03.07.2024 10:10				
Documents	03.07.2024 9:39	Supervisor	03.07.2024 9:39	0.11	03.07.2024 10:10	03.07.2024 9:39				
	01.07.2024 11:36	Supervisor	01.07.2024 11:36	0.09	01.07.2024 11:36	01.07.2024 11:36				
Products	01.07.2024 10:44	Supervisor	01.07.2024 10:44	0.19	01.07.2024 10:57	01.07.2024 10:44				
🚺 Knowledge base	28.06.2024 15:26	Supervisor	28.06.2024 15:26	1,623.60	29.06.2024 18:30	28.06.2024 15:26				
	28.06.2024 15:12	Supervisor	28.06.2024 15:12	1.76	28.06.2024 15:14	28.06.2024 15:12				
Forecasts	28.06.2024 15:12	Supervisor	28.06.2024 15:12	0.06	28.06.2024 15:12	28.06.2024 15:12				

- To open a single record, click on the 3 dots in the left corner next to the date you selected.
- Select the action you want to take:
 - 1. Open
 - 2. Сору
 - 3. Delete

Sales •	Workday tracker	r					+ New	± Import →	* 2
	🖿 Folders 🛛 🗣 👻 Tag filter						Q Search		2
Orders	Created on	Created by	Start date 👻	Duration,	Due date	Created on			+ :
	; [] 09.07.2024 11:12	Supervisor	09.07.2024 11:12	0.93	09.07.2024 11:13	09.07.2024 11:12			
Contracts	🕑 Open	Supervisor	09.07.2024 11:10	0.06	09.07.2024 11:10	09.07.2024 11:10			
- Invesione	Сору	Supervisor	03.07.2024 11:57	131.63	03.07.2024 16:56	03.07.2024 11:57			
ro invoices	🗂 Delete	Supervisor	03.07.2024 10:10	78.75	03.07.2024 11:56	03.07.2024 10:10			
Documents	03.07.2024 9:39	Supervisor	03.07.2024 9:39	0.11	03.07.2024 10:10	03.07.2024 9:39			
	01.07.2024 11:36	Supervisor	01.07.2024 11:36	0.09	01.07.2024 11:36	01.07.2024 11:36			
Products	01.07.2024 10:44	Supervisor	01.07.2024 10:44	0.19	01.07.2024 10:57	01.07.2024 10:44			
	28.06.2024 15:26	Supervisor	28.06.2024 15:26	1,623.60	29.06.2024 18:30	28.06.2024 15:26			

- When you open the selected record, you will see the page where it is:
 - 1. Contact
 - 2. Status
 - 3. Start and due date
 - 4. Duration, min
 - 5. History

Sales . Q Search app	← Workday trac Add tag	ker					¢. Close 2 🔒
Crders	GENERAL INFORMATION			1	2		
Contracts	Contact * Superv Start date * 09.07.20	sor 124 11:12	3 Due date	09.07.2024 11:13	tus• (Ended) Duration	, min 0.93	4
6 Invoices	► History 2 : Q 5						
B Documents	Parent record	Start date	Due date	Duration, min	Created by	Status	Id + :
	1	09.07.2024 11:12	09.07.2024 11:13	0.93	Supervisor	Ended	b1f381ee-59
Products	2	09.07.2024 11:12	09.07.2024 11:13	0.93	Supervisor	Ended	870af495-21
Knowledge base							

• You can export the time history to Excel:

Creatio + +	Q Search			::: Creatio + +	Q search					
les 🔹	 ← Workday track ■ Addiag 	ker		Sales ← Workday tracker						
	▼ Auto tay				Add tag					
Orders	GENERAL INFORMATION			Grders	GENERAL INFORM	ATION				
Contracts	Contact * Supervis	sor			Contact *	Supervisor				
	Start date * 09.07.20	24 11:12		Contracts		00.07.2027 332				
Invoices	- History 2 : Q				Start date •	09.07.2024 11:12				
Desuments	Parent record	Start date	Due date	fo Invoices	► History 2 :	۹				
Documents	1	09.07.2024 11:12	09.07.2024 11:1:	Documents	Parent rec	🛱 Export to Excel	2 Due date			
Products	2	09.07.2024 11:12	09.07.2024 11:1:		1	09.07.2024 11:12	09.07.20			
Knowledge base				Products	2	09.07.2024 11:12	09.07.20			
Forecasts				Knowledge base						

- If you need to add fields to your time tracking history, do the following:
 - 1. Click the "+" on the left side of the time tracking history table
 - 2. And select the required field from the menu that opens

		Close 🤁 🔒	Select field	
			Workday tracker history	
			Search	
			WORKDAY TRACKER HISTORY FIELDS RELATED OBJECTS	
Status* Ended			Q Contact	
	Duration, min 0.93		Q. Created by	
			挖 Created on	
			茂 Due date	
eated by	Status	+ :	1.2 Duration, min	
			ane IQ	
Ipervisor	Ended		Q Modified by	
Jpervisor	Ended		昆 Modified on	
			Q Parent record	
			挖 Start date	
			-	Cancel

• For example, select the ID field and click Select. The ID field appears in the tracking history.

Оберіть поле			Почати день	÷ ()	•	
Історія трекінгу робочого дня					~	*
Пошук				Закрити	2	8
Едата змінення	*					
Дата створення						
Вавершення						
Q. Змінив		CTatyc • Ended	y			
Q Контакт	ия 28.06.20	24 15:06	Тривалість, хв 0,09			
巷 Початок		•				
Q Статус						
Q. Створив	B	Статус	ld		+ :	
1.2 Тривалість, хв	isor	Ended	4c14f1a4-ea43-45b	5-867d-fe427f0		
June Id	isor	Ended	5b6fbc36-1b7f-44ff-	a7c8-903e0f80.		

- To export/delete all records of the selected employee, follow these steps:
 - 1. Select all records
 - 2. Select the action you want to perform Export/Delete

III Creatio + +	Q Search					Start da	v #	. 9	٥
Sales -	Workday tracker						+ New	± Impo	rt ¥
Q Search app	🖿 Folders 🛛 🗣 👻 Tag filter	1					Q Search		
Grders	Created on	Created by	Start date 👻	Duration,	Due date	Created on			+
	: 💟 09.07.2024 11:12	Supervisor	09.07.2024 11:12	0.93	09.07.2024 11:13	09.07.2024 11:12			
Contracts	09.07.2024 11:10	Supervisor	09.07.2024 11:10	0.06	09.07.2024 11:10	09.07.2024 11:10			
	03.07.2024 11:57	Supervisor	03.07.2024 11:57	131.63	03.07.2024 16:56	03.07.2024 11:57			
ro Involces	03.07.2024 10:10	Supervisor	03.07.2024 10:10	78.75	03.07.2024 11:56	03.07.2024 10:10			
E Documents	03.07.2024 9:39	Supervisor	03.07.2024 9:39	0.11	03.07.2024 10:10	03.07.2024 9:39			
	01.07.2024 11:36	Supervisor	01.07.2024 11:36	0.09	01.07.2024 11:36	01.07.2024 11:36			
Products	01.07.2024 10:44	Supervisor	01.07.2024 10:44	0.19	01.07.2024 10:57	01.07.2024 10:44			
Knowledge base	28.06.2024 15:26	Supervisor	28.06.2024 15:26	1,623.60	29.06.2024 18:30	28.06.2024 15:26			
	28.06.2024 15:12	Supervisor	28.06.2024 15:12	1.76	28.06.2024 15:14	28.06.2024 15:12			
Forecasts	28.06.2024 15:12	Supervisor	28.06.2024 15:12	0.06	28.06.2024 15:12	28.06.2024 15:12			
	28.06.2024 15:06	Supervisor	28.06.2024 15:06	0.09	28.06.2024 15:06	28.06.2024 15:06			
- opportunites	24.06.2024 11:41	Supervisor	24.06.2024 11:41	25.94	24.06.2024 12:53	24.06.2024 11:41			
Chat	24.06.2024 11:30	Supervisor	24.06.2024 11:30	0.04	24.06.2024 11:30 2	24.06.2024 11:30			
	21.06.2024 13:29	Supervisor	21.06.2024	0.05	21.06.2024 13:29 xcel in Delete X	21.06.2024 13:29			
Workday tracker	21.06.2024 12:25	Supervisor	21.06.2024.12:25	0.00		21.06.2024 12:25			

Configure access rights

• To set up access to the section for selected employees/departments, go to the system designer:

III Creatio 🕨 +	Q Search			Start day	🖈	0 🗘	s
Sales 🗸							
Q Search app							
	Hello, Superviso	or!					
Orders	Total opportunity count	\$ Opportunity amount, current month	# Open leads		1		
Contracts	100		00				
	109	0	88				
invoices	\$ Plan vs Fact by sales manager, c	urrent quarter					
Documents	12		• Pla	n 💿 Fact 💿 Opportunity			
Producto	1-						
	0.8-						
🚺 Knowledge base	0.4						
Forecasts	0.2-0-						

• Select Workplace setup:

III Creatio + +	Q Search.	Start day	::	.	•
Sales 🗸	Creatio				
Q Search app					
	Setup duplicates rules				
📜 Orders	Languages				
	Translation				
🛃 Contracts	Lookups				
	System settings				
o Invoices	Report setup				
	Section wizard				
Documents	ML models				
_	Detail wizard				
Products	Mobile application wizard				
-					
Knowledge base	Set up view				
	Workplace setup				
Forecasts	Logo customization				
	Color customization				
- Opportunities	Setup appearance				
Chat					

• Add a General workplace:

III Creatio 🕨 +	Q Search		Start day	::	.	?	٥	s
Sales -	Workplace setup 1							1
Q Search app	NEW USER WORKPLACE +							
Crders	General 2 Portal 2	Type General		Applicati Browser	on client ty	rpe		-
Contracts	Sales Portal	General Portal		Browser Browser				
o Invoices	Senice Markating	General General		Browser				
Documents	Contact center My applications	General General		Browser				
Products	Self-service Studio	Portal General		Browser				
Knowledge base	Digital ads Customer 300	General General		Browser				
Forearts	Case management	General		Browser				

• Enter a name:

::: Creatio	• +	Q Search_	Start day	**	.	0	٥	s
Sales		Workday Tracker						1
Q Search app		CLOSE						¥€¢
Orders		Name* Workday Tracker Home page				+ (3	٦
Contracts		Use only in shell						
lnvoices		< WORKPLACE SETUP						>
Documents		🖀 Sections + : 📀						

- Add a Workday tracker section:
 - 1. Click the + next to the Section field
 - 2. Check the box next to the Workday Tracker section
 - 3. Click Select

Creatio	► +	Q Search	Select: Section 3	
S		Workday Tracker	SELECT CANCEL ACTIONS - Record	ds selected: 1 V
Search app		CLOSE	Services Single Sim On Setting:	
Orders		Name* Workday Tracker	Single Sign On Seture Split tests System settings	
Contracts		Use only in shell	System users Tasks r Translation	
Invoices		< WORKPLACE SETUP	UI Management Webhooks Web services	
Documents		Sections + : 🏠	 Website events ✓ Workday tracker 2 	

- Add a group of users who will have access to the Workday Tracker section:
 - 1. Click the + next to the User group field.
 - 2. Select the checkbox next to the user group you are granting access to. For example, Accounting Department. Head Office
 - 3. Click Select

Creatio + Q Search	Select: System administration object	
Sales Vorkday Tracker	SELECT CANCEL Become control	tool: 1)
Q Search appCLOSE		.eu. I
Orders	Varkday Tracker	
Contracts	1-st line support. Management group	
Invoices WORKPLACE SETUP	2nd-line support 2-nd line support. Management group	
Documents	3rd-line support 3-rd line support. Management group Accurate and accu	
Products	Accounting Department Accounting Department Accounting Department. Head Office Accounting Department. Head Office Accounting Department Accounting De	
Knowledge base	1 All employees All external users	
Forecasts	The second secon	

- Select the home page:
 - 1. Click on the arrow to the right of the Home page name
 - 2. Select Workday Tracker list page

III Creatio 🕨 +	Q Search_	Start day 👫 🙏	0 🗘 🧕
Sales 👻	Workday Tracker		2
Q Search app	SAVE CANCEL		€ ¢
📜 Orders	Name" Workday Tracker Home page	<u> </u>	+ 0
Contracts	Use only in shell	Organization structure form page	
fo Invoices	< WORKPLACE SETUP	Workday tracker form page	>
	Sections + : 🍫	Workday tracker list page	
	Workday tracker	GenTestSection form page	
Products	🗖 User groups 🕂 🗄 🚱	Webhooks log	
🚺 Knowledge base	Accounting Department. Head Office	Webhooks list page	
Forecasts		webnooks form page Base form for Openid provider	
		Web forms and pages	
Opportunities		Tasks form page	
		Tae mini naea	

• Save the changes

III Creatio 🕨 +	Q Search_	Start day	::	*	?	٥
Sales 🔹	Workday Tracker					
Q Search app	SAVE CANCEL					
📜 Orders	Name* Workday Tracker Home page Workday tracker list page			Ŧ	ß	٥
Contracts	Use only in shell					
o Invoices	< WORKPLACE SETUP					
Documents	Sections + : •					
Products	🛛 Usergroups + 🗄 📀					
Knowledge base	Accounting Department. Head Office					

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

• To configure access to the Start/End Day button, go to the system designer:

III Creatio 🕨 + 🕻	Q Search		Start d	an 🕂 🔺 🛛 🗘 📀
Sales 🗸				
Q Search app				
	Hello, Supervis	or!		- the
Crders	Total opportunity count	\$ Opportunity amount, current month	# Open leads	
Contracts	100	0	00	6000
	109	0	00	GAT AND
	\$ Plan vs Fact by sales manager,	current quarter	21	
Documents	12-		Plan Fact Opportunity	
Producto	1-			
Products	0.8-			
🔰 Knowledge base	0.4			
	0.2-			
Forecasts				

Workday Tracker for Creatio

• Go to the Operations permissions section

iii Creatio 🕨 🕂	- Q Search_	F. Beller	Start day	::	.	?	٥
Sales	Creatio						
Q Search app	8.1.0.6827						
	Processes						
Grders	Process library						
	Process log						
🔗 Contracts		Connector to Five9 telephony					
	Levens and administration						
fo Invoices	- System users	Contact center product suite					
	Organizational roles						
Documents	Functional roles						
	Object permissions						
Products	Operation permissions						
	Audit log	Developer's guide to Creatio platform					
Knowledge base	Change log	Developer's guide to Creatio platform					
	External access						
Forecasts	License manager	-gntning tast implementation Getting started					
	Single Sign On configuration	7					

• Select the <u>Can see tracking button</u> option from the list:

III Creatio + +	Q Пошук		Почати день	::	.	?	٥	s
Всі програми 🗸	Доступ до операцій							~
Q Пошук застосунку	ДОДАТИ ОПЕРАЦІЮ					e	игляд	•
GenTestSection	Фільтри/групи Назва ∧	Код	Опис					
Organization	Can see tracking button	GenCanSeeTrackingButton						-
structure	Взможность скинути 2FA	CanReset2FA						
	Видалення будь-яких даних	CanDeleteEverything						
(C) Workday tracker	Виконати генерацію команд	CanStartCommandGeneration						
	Додавання будь-яких даних	CanInsertEverything						
🚺 База знань	Доступ до OData	CanUseODataService						
	Доступ до коментарів	CanEditOrDeleteComment						
Бібліотека процесів	Доступ до модуля налаштування головної сторінки порталу	CanManagePortalMainPage						
	Доступ до налаштування кейсів	CanManageDcm						_
🛯 Веб-сервіси	Доступ до налаштування кольорів панелі розділів	CanManageSectionPanelColorSettings						
	Доступ до налаштування робочих місць	CanManageWorkplaceSettings						

- Select the user or group of users to whom you want to grant access to the Start/End Day button:
 - 1. Click the + next to the Operations permission.
 - 2. Select the checkbox next to the name of the user or group of users you want to grant access to. For example, William Walker.
 - 3. Click Select

🗄 Creatio 🕨	+ Q Search	Select: System administration object	
Sales	Can see tracking button	SELECT CANCEL	Records selected: 1
Q Search app	CLOSE	Name	
👾 Orders	Name* Can see tracking button		
Contracts	Description	test div. Managers group	
nvoices	Operation permission	Test Managers group test org TestOrganization	
Documents	1	TestOrganization-Subsection TestOrganization-Subsection. Група керівників TestOrganization. Група керівників	
Products		test org. Managers group V.Murphy V.Murphy	
Knowledge base		☐ will.clarks@diamondsys.us ✔ William Walker	
Click (Close		
eatio 🕨 + 🤉	Search_	Start	day 🚼 🙏
h app_	Can see tracking button		
ers 🕑	Name* Can see tracking button	Code" GenCanSeeTrackingButton	
tracts	Description		
bices	Operation permission 🦳 🔍 + 🗄 🚱		
	User/role	Access level	

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

Task time-tracking

The button **"Start work"** is visible for created activities and only for participants of this activity in case they have permission for the operation **"Can see tracking button for activities"** (GenCanSeeActivityTrackingButton)

When a user starts working on an activity, the status of the activity changes to "In progress". When it completes, the statuses do not change

Information on who performed is displayed on the Summary tab.

There are two details:

- the first: every time someone starts or ends a work

Once completed, the time (completion - start) in hours is additionally calculated and recorded in both records

- second: total working time for each user

III Creatio 🕨 🛨	Q Search_			+ Start	day 🔛 🙏	0 0 🖗
All apps - Q tasks ×	← Task 1 ♥ Add tag			1	+ Start work	Close 🔒
Tasks	Details Priority • Medium	MAIN INFO SUMMARY Task tracking history +	2 : Q			
	Category * To do	Participant	Status	Time	Hours spent	+ :
	Location	1 Supervisor	In progress	8/12/2024 5:09 PM	0.03	
		2 Supervisor	In progress	8/12/2024 5:56 PM	0.06	
	Show in calendar	3 Supervisor	Finished	8/12/2024 5:11 PM	0.03	
	Executors	4 Supervisor	In progress	8/12/2024 5:12 PM	0.02	
	Owner	Tracking totals + 2	: Q			
	Supervisor	Participant	Total hours spe			+ :
	Role Ist-line support	1 Supervisor	0.12			
	Reporter Supervisor					
	Reminders					

Our contacts:

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