

Installation

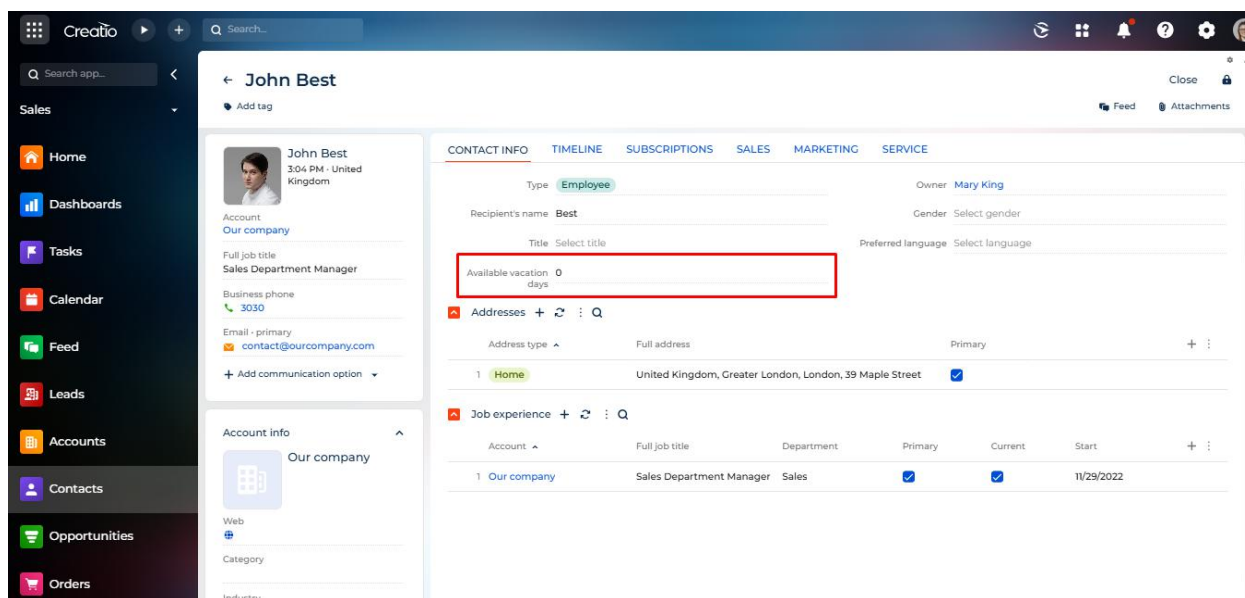
Installation of the application has a standard procedure.

To install the app, go to the Creatio marketplace [documentation](#).

Vacation days accrual

- After installation of the application, the Available vacation days field will appear in the Contact page

The business process of accruing vacation days starts every day at 1:00 am UTC.



The screenshot shows the Creatio CRM interface. On the left is a sidebar with navigation options: Home, Dashboards, Tasks, Calendar, Feed, Leads, Accounts, Contacts, Opportunities, and Orders. The main area displays the contact profile for 'John Best'. The profile includes a header with the name and a photo, followed by account information: 'Our company', 'Sales Department Manager', and 'Business phone 3030'. Below this is the 'Account info' section with fields for 'Web', 'Category', and 'Industry'. The right side of the profile shows the 'CONTACT INFO' tab, which includes fields for 'Type' (Employee), 'Owner' (Mary King), 'Recipient's name' (Best), 'Gender' (Select gender), 'Title' (Select title), and 'Preferred language' (Select language). A red box highlights the 'Available vacation' field, which currently shows '0 days'. Below this are sections for 'Addresses' and 'Job experience'.

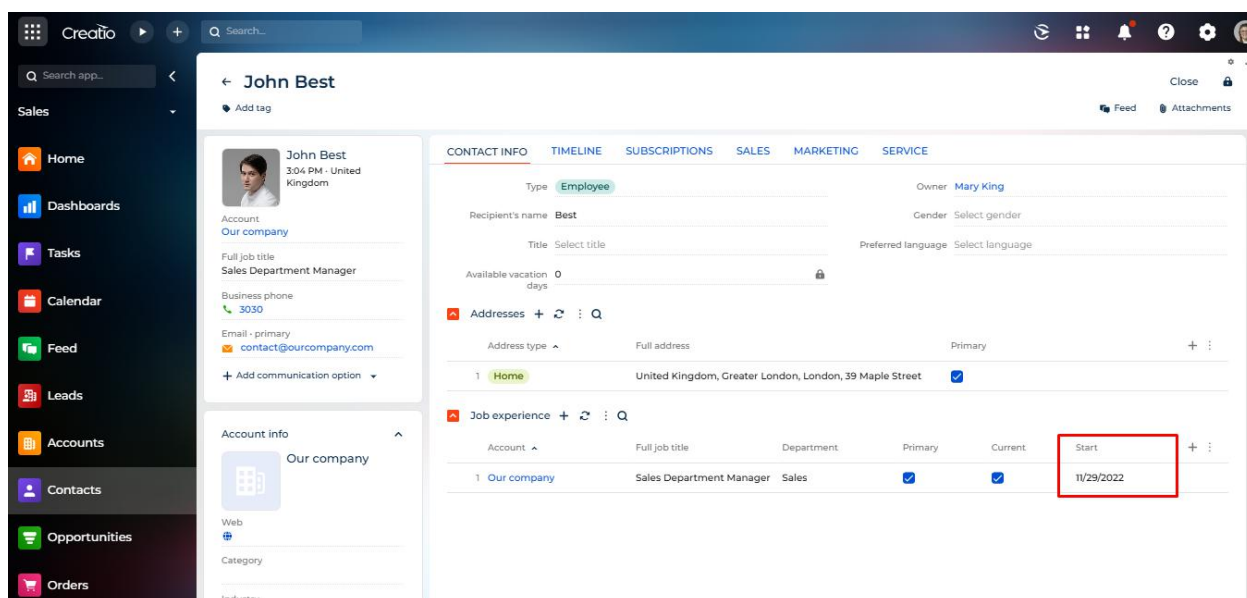
Address type	Full address	Primary
1 Home	United Kingdom, Greater London, London, 39 Maple Street	<input checked="" type="checkbox"/>

Account	Full job title	Department	Primary	Current	Start
1 Our company	Sales Department Manager	Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11/29/2022

- Only contacts with the Employee type gain vacation days.

- An employee receives new vacation days every time a full calendar month passes since the date of hire. The date of hiring is the date in the Start column in the Job experience detail, for which the Primary checkbox is checked. By default, a contact can have only one such record.

For example, in the case of the employee on the screenshot, vacation days will be accrued on the 30th of each month.

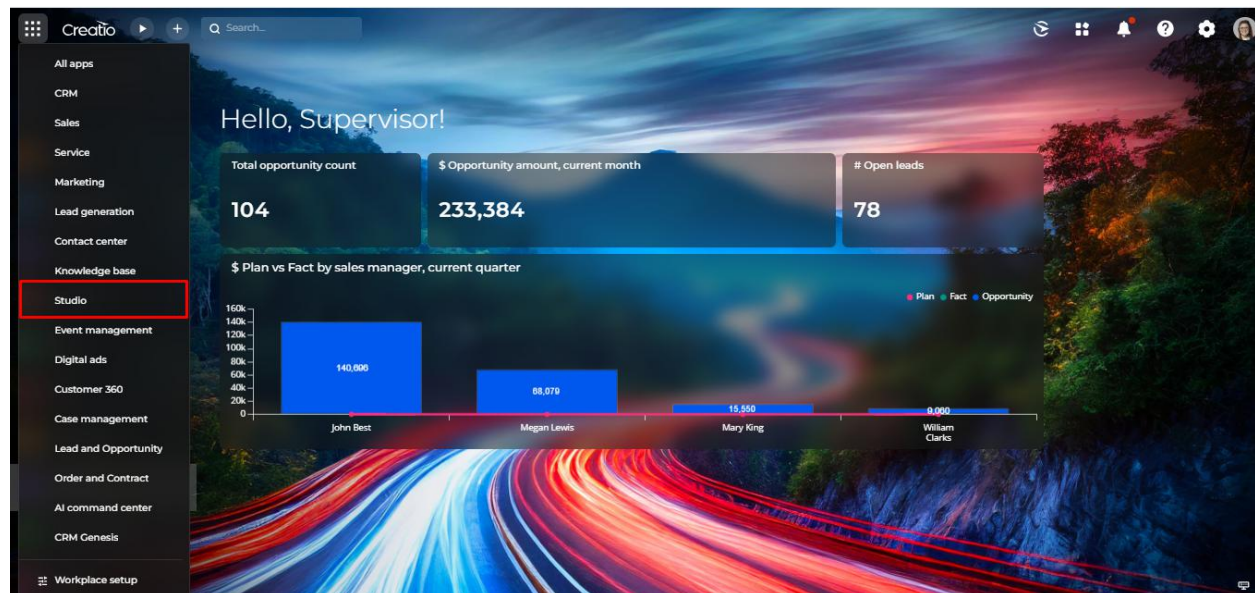


The screenshot displays the CRM interface for a contact named John Best. The left sidebar shows navigation options like Home, Dashboards, Tasks, Calendar, Feed, Leads, Accounts, Contacts, Opportunities, and Orders. The main content area shows the contact's profile and details. The 'Job experience' section is highlighted with a red box, showing a record for 'Our company' as 'Sales Department Manager' in the 'Sales' department, with a 'Start' date of '11/29/2022'.

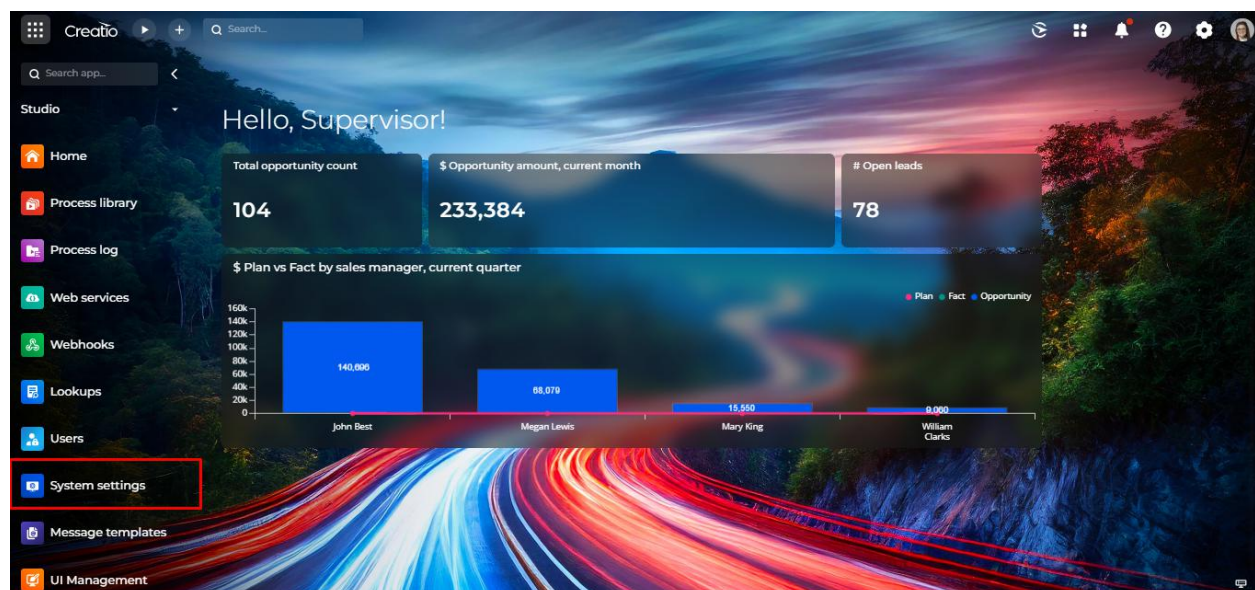
Account	Full job title	Department	Primary	Current	Start
1 Our company	Sales Department Manager	Sales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	11/29/2022

You can change the number of vacation days to accrual per month in the system settings.

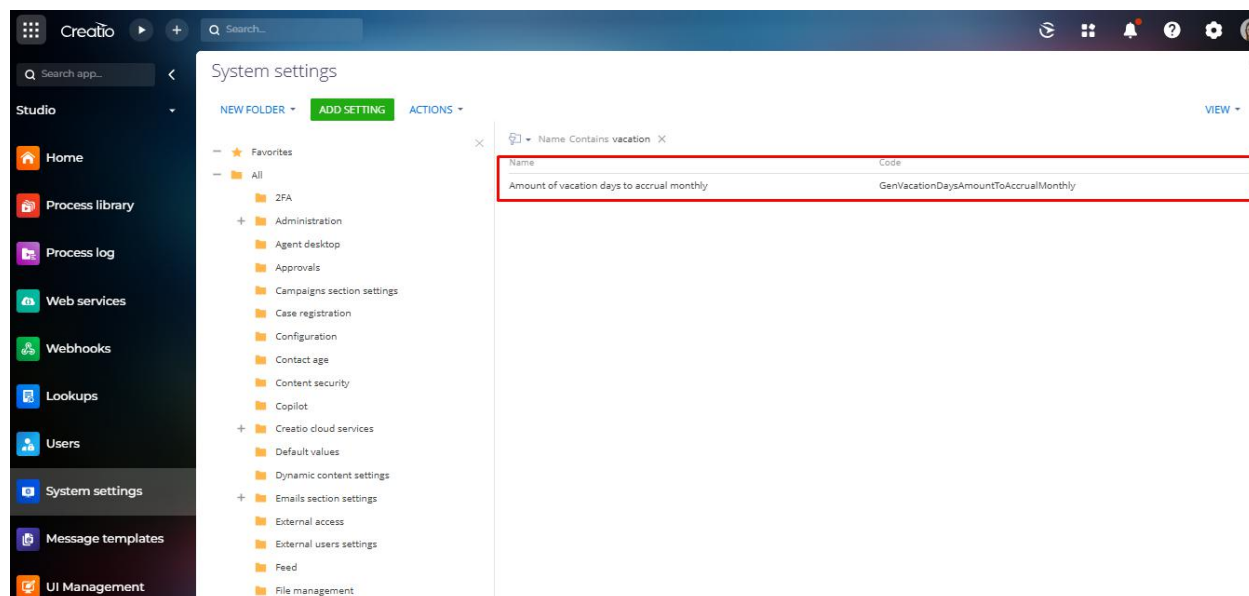
- Go to the Studio workspace



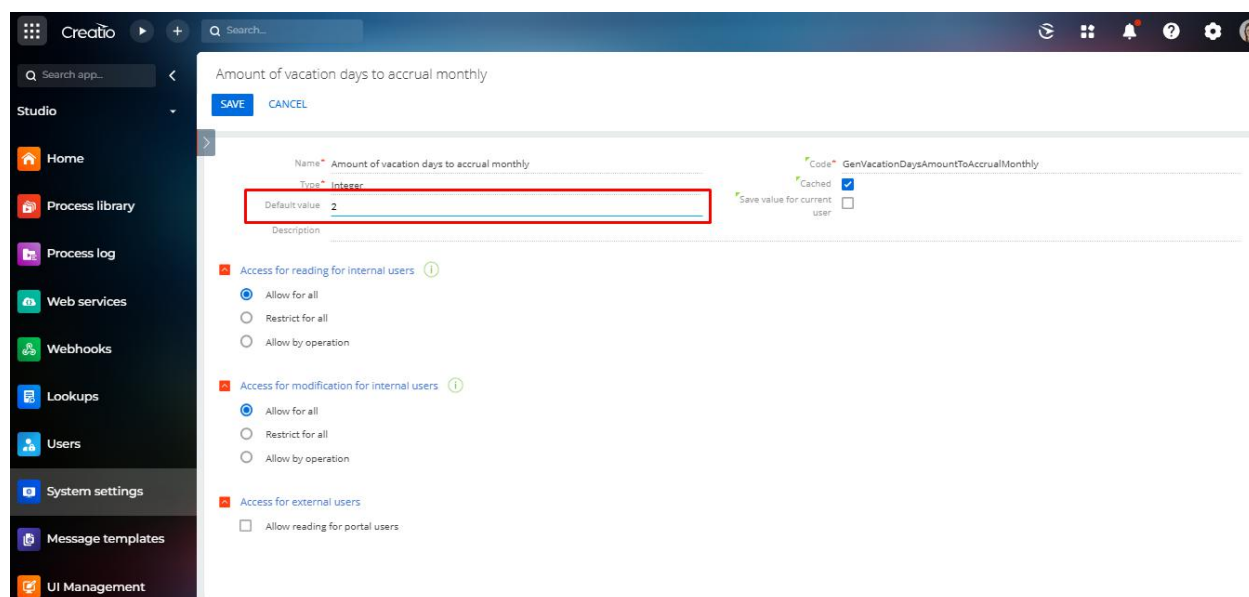
- Select the System settings section



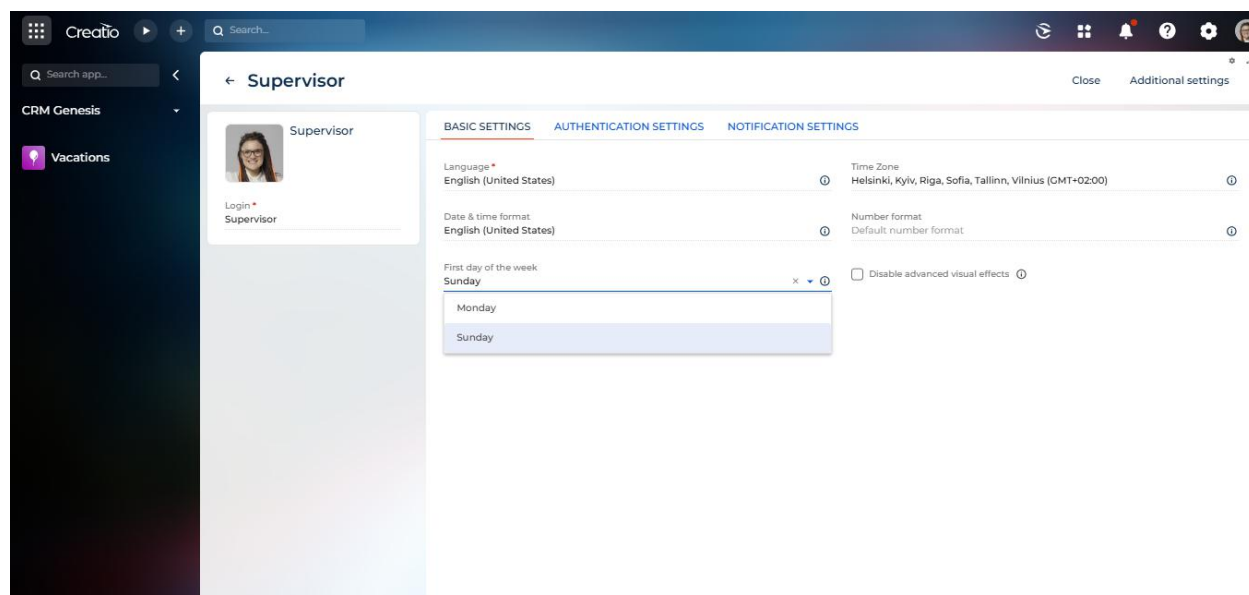
- Find the Amount of vacation days to accrual monthly and open this setting



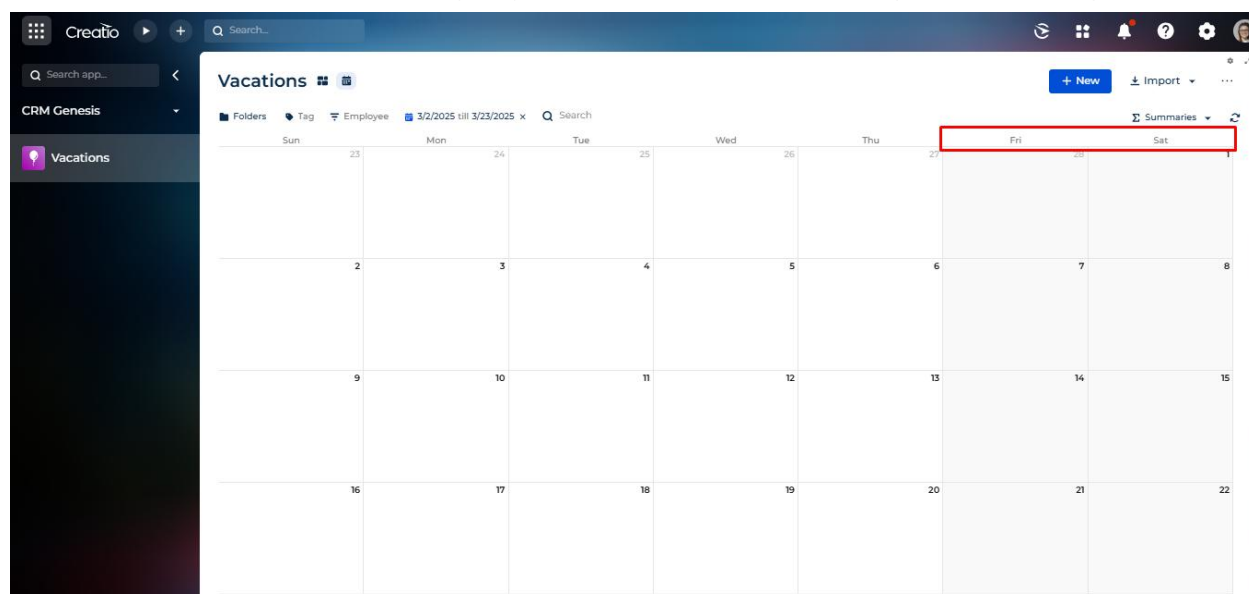
- Enter the number of vacation days that will be accrued to employees each month



- You can change the first day of the week in the system.

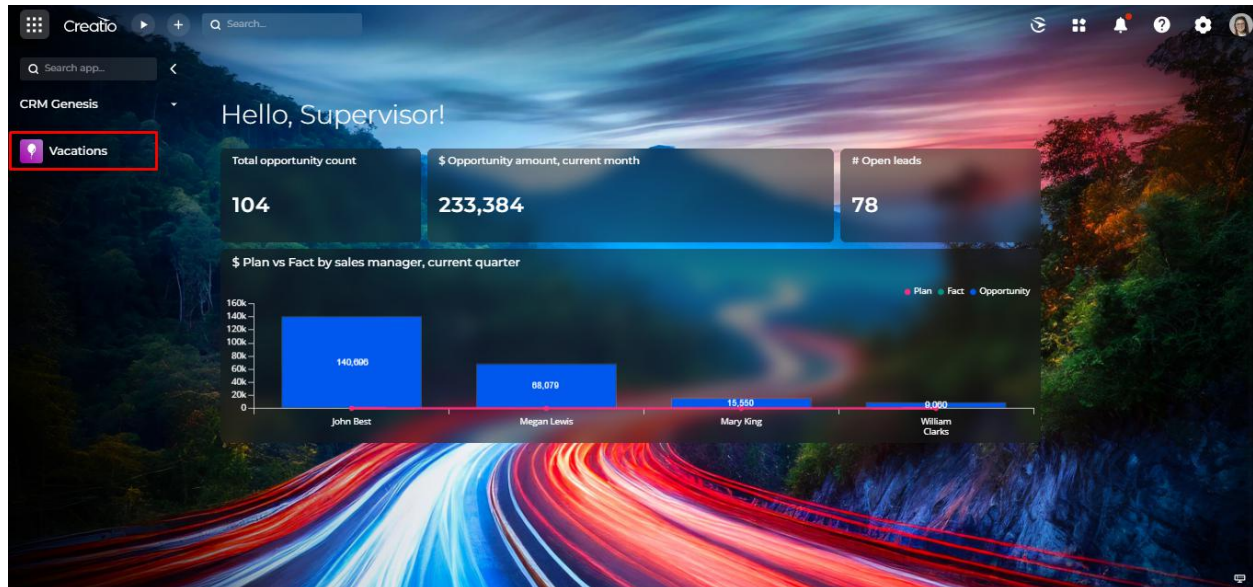


- Calendar will automatically adjust the weekends according to this setting.

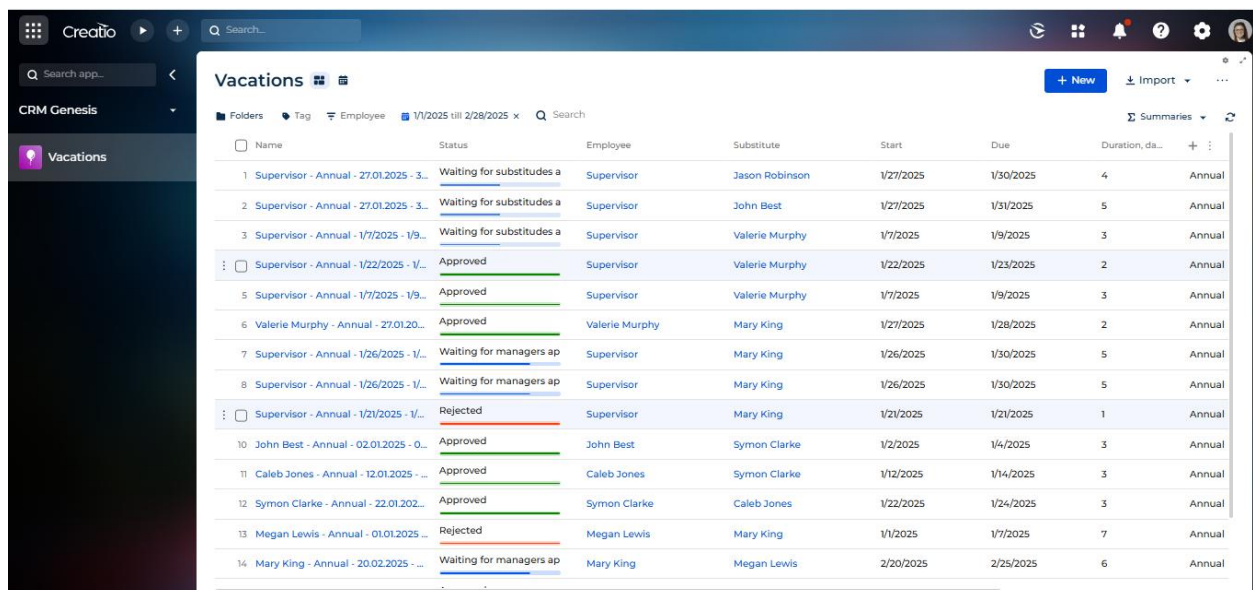


Creating a vacation

- After installation, the application will add a separate section called Vacations



- To create a vacation, click on the Vacations section.

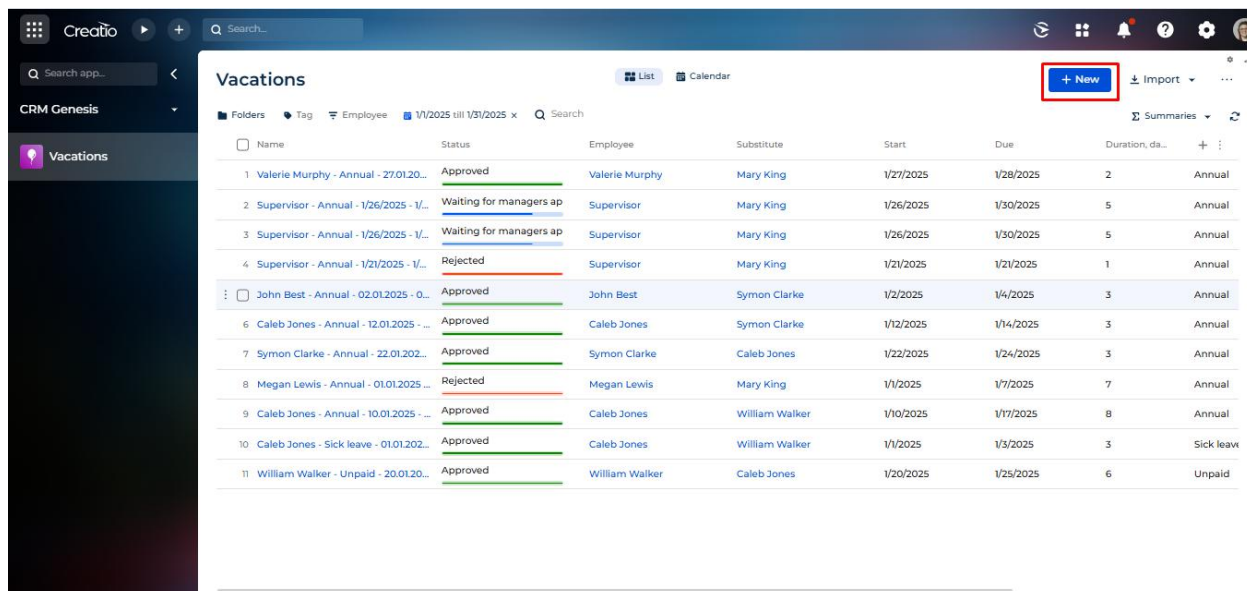


Vacations Section Overview:

- Buttons:** + New, Import
- Filters:** Folders, Tag, Employee, 1/1/2025 till 2/28/2025 x, Search
- Table:**

Name	Status	Employee	Substitute	Start	Due	Duration, da...	
1 Supervisor - Annual - 27.01.2025 - 3...	Waiting for substitutes a	Supervisor	Jason Robinson	1/27/2025	1/30/2025	4	Annual
2 Supervisor - Annual - 27.01.2025 - 3...	Waiting for substitutes a	Supervisor	John Best	1/27/2025	1/31/2025	5	Annual
3 Supervisor - Annual - 1/7/2025 - 1/9...	Waiting for substitutes a	Supervisor	Valerie Murphy	1/7/2025	1/9/2025	3	Annual
4 Supervisor - Annual - 1/22/2025 - 1/...	Approved	Supervisor	Valerie Murphy	1/22/2025	1/23/2025	2	Annual
5 Supervisor - Annual - 1/7/2025 - 1/9...	Approved	Supervisor	Valerie Murphy	1/7/2025	1/9/2025	3	Annual
6 Valerie Murphy - Annual - 27.01.20...	Approved	Valerie Murphy	Mary King	1/27/2025	1/28/2025	2	Annual
7 Supervisor - Annual - 1/26/2025 - 1/...	Waiting for managers ap	Supervisor	Mary King	1/26/2025	1/30/2025	5	Annual
8 Supervisor - Annual - 1/26/2025 - 1/...	Waiting for managers ap	Supervisor	Mary King	1/26/2025	1/30/2025	5	Annual
9 Supervisor - Annual - 1/21/2025 - 1/...	Rejected	Supervisor	Mary King	1/21/2025	1/21/2025	1	Annual
10 John Best - Annual - 02.01.2025 - 0...	Approved	John Best	Symon Clarke	1/2/2025	1/4/2025	3	Annual
11 Caleb Jones - Annual - 12.01.2025 - ...	Approved	Caleb Jones	Symon Clarke	1/12/2025	1/14/2025	3	Annual
12 Symon Clarke - Annual - 22.01.202...	Approved	Symon Clarke	Caleb Jones	1/22/2025	1/24/2025	3	Annual
13 Megan Lewis - Annual - 01.01.2025 ...	Rejected	Megan Lewis	Mary King	1/1/2025	1/7/2025	7	Annual
14 Mary King - Annual - 20.02.2025 - ...	Waiting for managers ap	Mary King	Megan Lewis	2/20/2025	2/25/2025	6	Annual

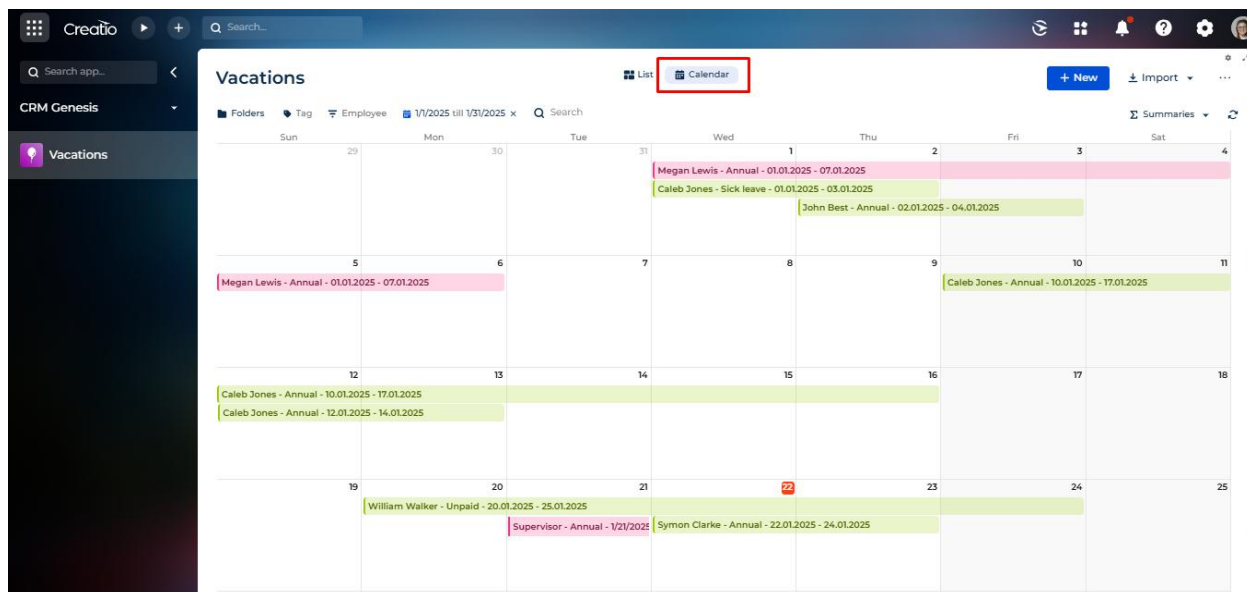
- Then click the New button



Vacations | List | Calendar | + New | Import | Summaries

Name	Status	Employee	Substitute	Start	Due	Duration, da...	
1 Valerie Murphy - Annual - 27.01.20...	Approved	Valerie Murphy	Mary King	1/27/2025	1/28/2025	2	Annual
2 Supervisor - Annual - 1/26/2025 - 1/...	Waiting for managers ap	Supervisor	Mary King	1/26/2025	1/30/2025	5	Annual
3 Supervisor - Annual - 1/26/2025 - 1/...	Waiting for managers ap	Supervisor	Mary King	1/26/2025	1/30/2025	5	Annual
4 Supervisor - Annual - 1/21/2025 - 1/...	Rejected	Supervisor	Mary King	1/21/2025	1/21/2025	1	Annual
5 John Best - Annual - 02.01.2025 - 0...	Approved	John Best	Symon Clarke	1/2/2025	1/4/2025	3	Annual
6 Caleb Jones - Annual - 12.01.2025 - ...	Approved	Caleb Jones	Symon Clarke	1/12/2025	1/14/2025	3	Annual
7 Symon Clarke - Annual - 22.01.202...	Approved	Symon Clarke	Caleb Jones	1/22/2025	1/24/2025	3	Annual
8 Megan Lewis - Annual - 01.01.2025 ...	Rejected	Megan Lewis	Mary King	1/1/2025	1/7/2025	7	Annual
9 Caleb Jones - Annual - 10.01.2025 - ...	Approved	Caleb Jones	William Walker	1/10/2025	1/17/2025	8	Annual
10 Caleb Jones - Sick leave - 01.01.202...	Approved	Caleb Jones	William Walker	1/1/2025	1/3/2025	3	Sick leav
11 William Walker - Unpaid - 20.01.20...	Approved	William Walker	Caleb Jones	1/20/2025	1/25/2025	6	Unpaid

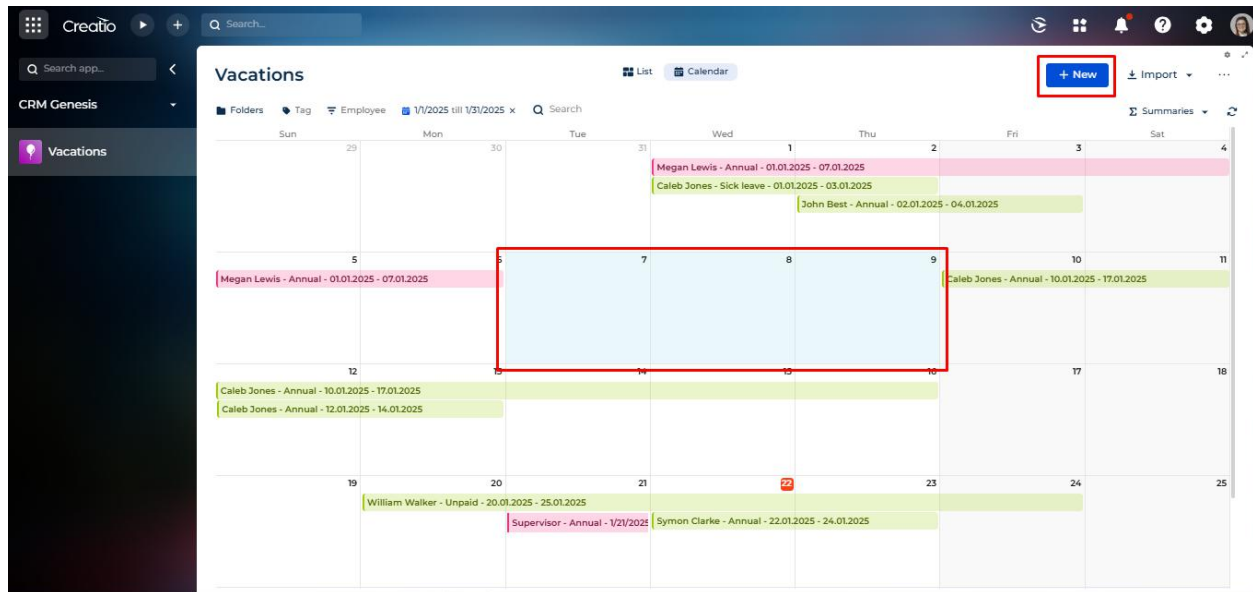
- You can also add a vacation via the calendar



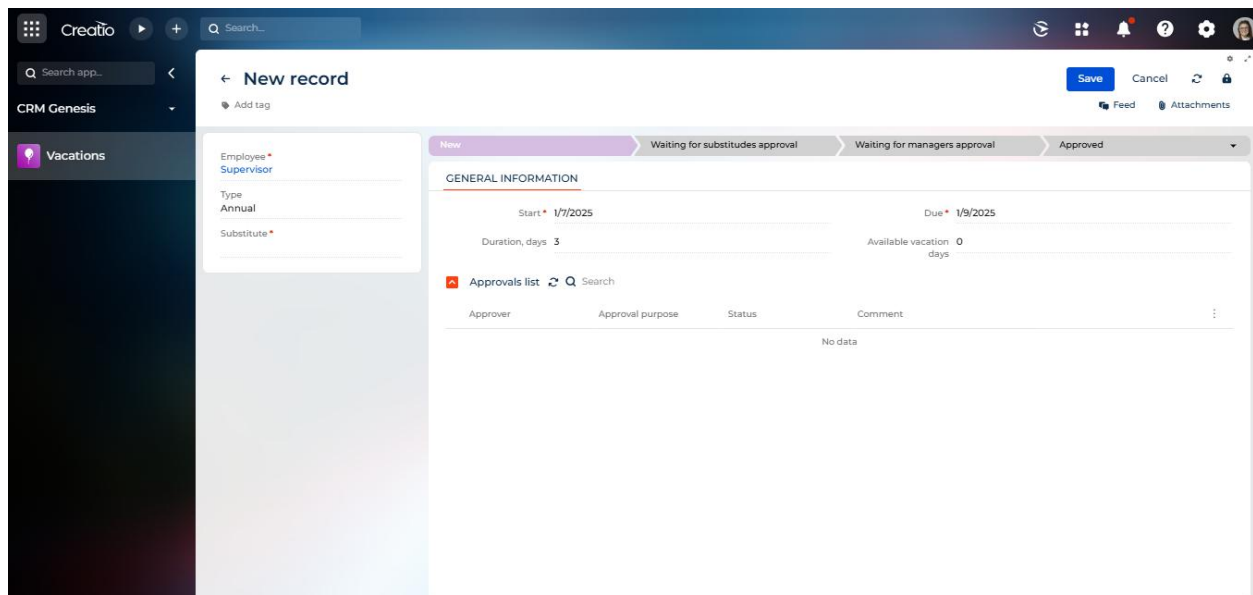
Vacations | List | Calendar | + New | Import | Summaries

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
			Megan Lewis - Annual - 01.01.2025 - 07.01.2025	Caleb Jones - Sick leave - 01.01.2025 - 03.01.2025	John Best - Annual - 02.01.2025 - 04.01.2025	
5	6	7	8	9	10	11
Megan Lewis - Annual - 01.01.2025 - 07.01.2025					Caleb Jones - Annual - 10.01.2025 - 17.01.2025	
12	13	14	15	16	17	18
Caleb Jones - Annual - 10.01.2025 - 17.01.2025	Caleb Jones - Annual - 12.01.2025 - 14.01.2025					
19	20	21	22	23	24	25
	William Walker - Unpaid - 20.01.2025 - 25.01.2025	Supervisor - Annual - 1/21/2025	Symon Clarke - Annual - 22.01.2025 - 24.01.2025			

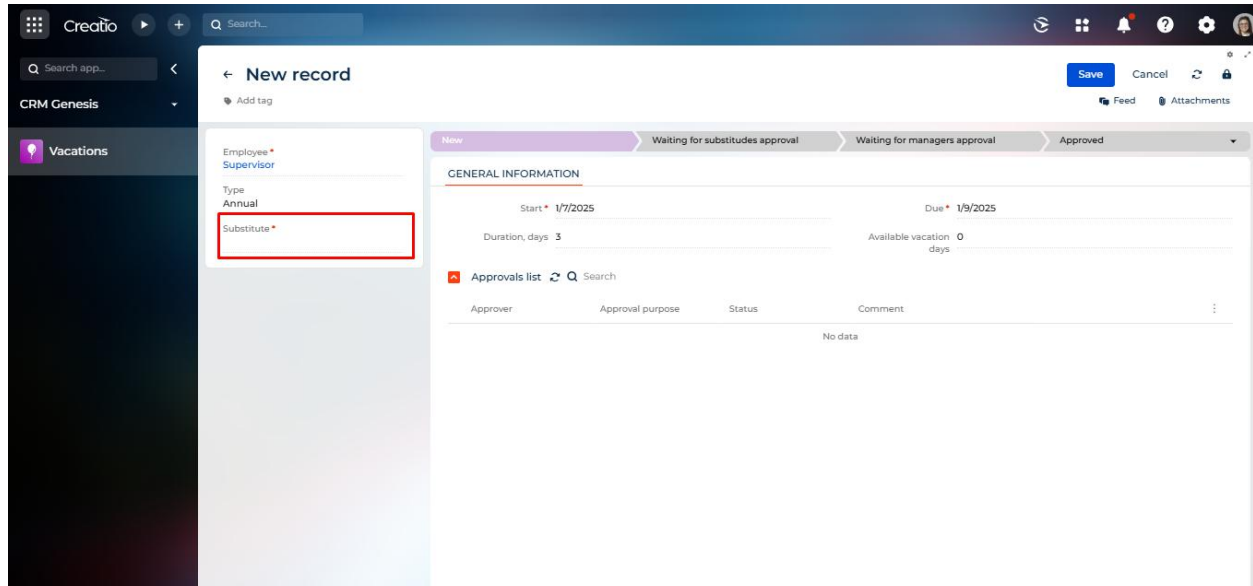
- Select a range of vacation dates and click New



- After that, you will see the vacation creation page

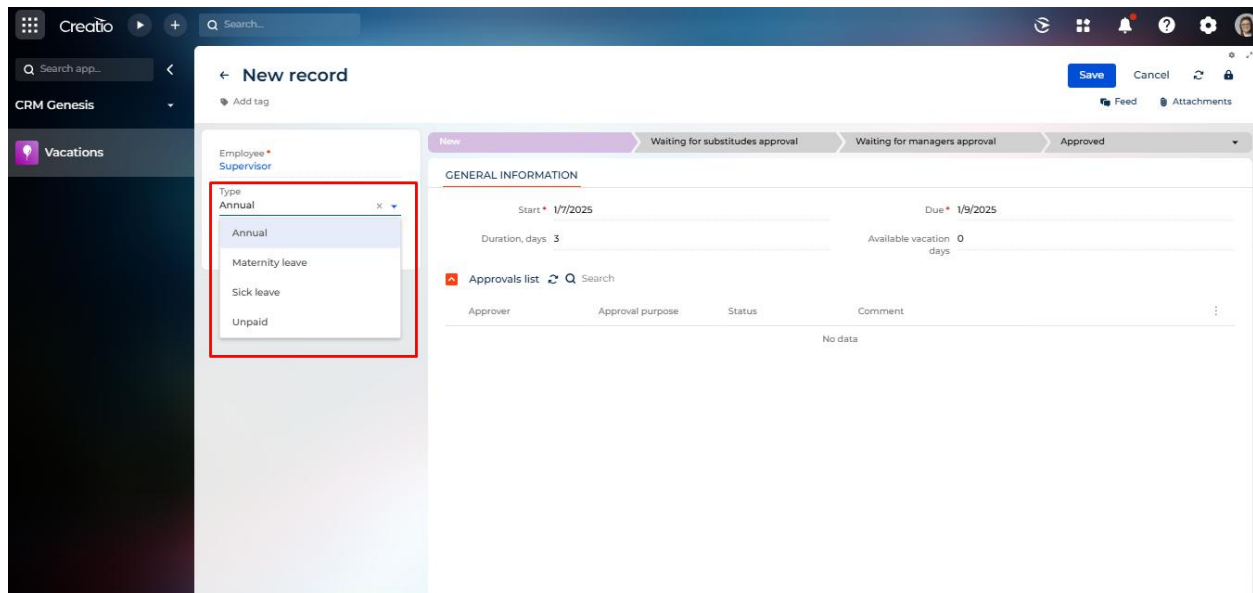


- Select a Substitute who will perform your tasks during the vacation period



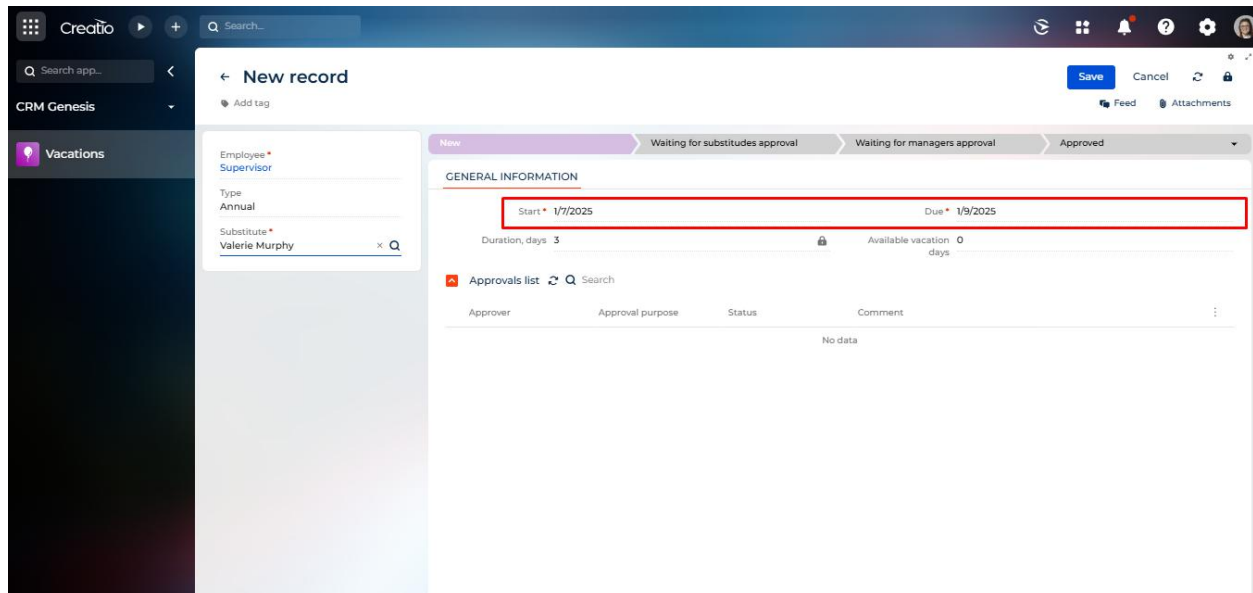
The screenshot shows the 'New record' form for 'Vacations' in CRM Genesis. The form is titled 'New record' and has a 'Save' button. The left sidebar shows the 'Vacations' section. The main form area has a 'GENERAL INFORMATION' section with fields for 'Start' (1/7/2025), 'Due' (1/9/2025), 'Duration, days' (3), and 'Available vacation days' (0). Below this is an 'Approvals list' table with columns for 'Approver', 'Approval purpose', 'Status', and 'Comment'. The 'Substitute' field is highlighted with a red box.

- Select the type of vacation



The screenshot shows the 'New record' form for 'Vacations' in CRM Genesis. The form is titled 'New record' and has a 'Save' button. The left sidebar shows the 'Vacations' section. The main form area has a 'GENERAL INFORMATION' section with fields for 'Start' (1/7/2025), 'Due' (1/9/2025), 'Duration, days' (3), and 'Available vacation days' (0). Below this is an 'Approvals list' table with columns for 'Approver', 'Approval purpose', 'Status', and 'Comment'. The 'Type' dropdown menu is open, showing options: 'Annual', 'Maternity leave', 'Sick leave', and 'Unpaid'. The 'Annual' option is selected.

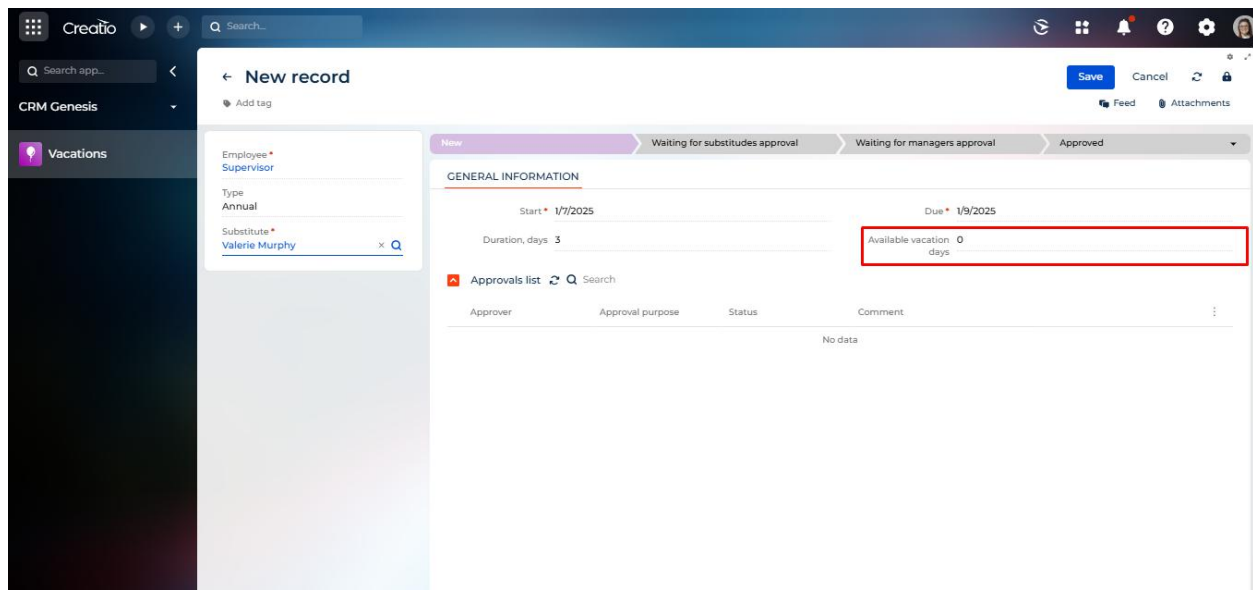
- Select Vacation Start and End dates



The screenshot shows the 'New record' form for 'Vacations' in the CRM Genesis application. The form is divided into several sections:

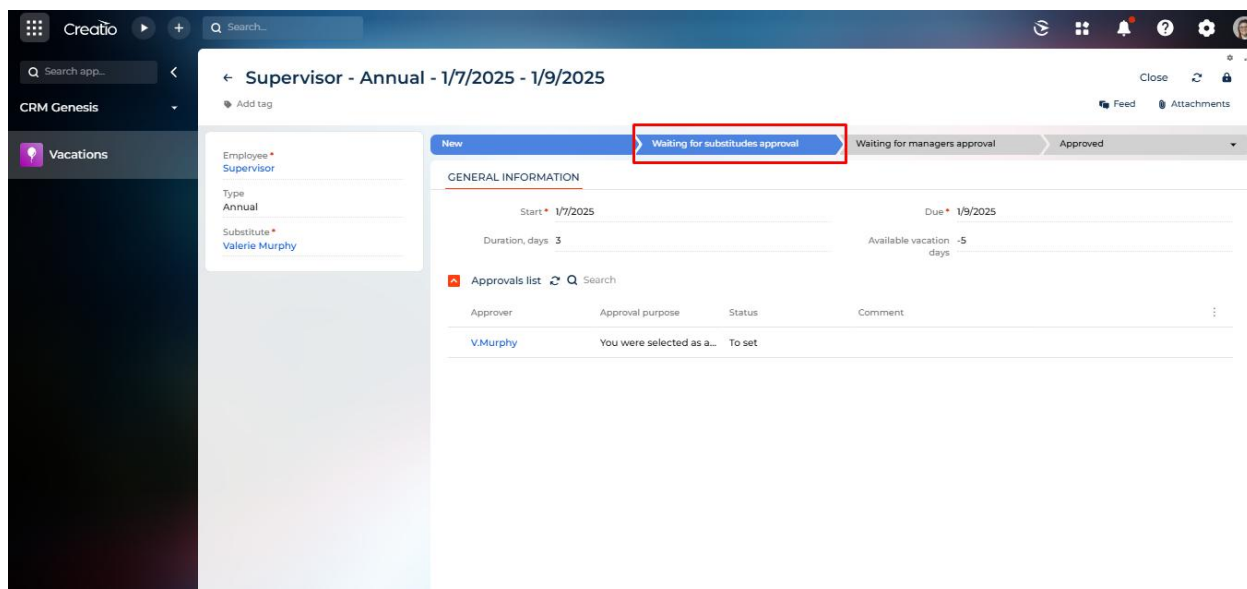
- Employee:** Supervisor
- Type:** Annual
- Substitute:** Valerie Murphy
- GENERAL INFORMATION:**
 - Start:** 1/7/2025
 - Due:** 1/9/2025
 - Duration, days:** 3
 - Available vacation:** 0 days
- Approvals list:** A table with columns for Approver, Approval purpose, Status, and Comment. It currently shows 'No data'.

- You also can see the number of available vacation days when creating a new vacation



This screenshot is similar to the one above, but it highlights the 'Available vacation' field in the GENERAL INFORMATION section, which shows 0 days. The form structure and other fields remain the same.

- Send a vacation to a substitute for confirmation



CRM Genesis

Vacations

Supervisor - Annual - 1/7/2025 - 1/9/2025

Employee * Supervisor

Type Annual

Substitute * Valerie Murphy

Start * 1/7/2025

Due * 1/9/2025

Duration, days 3

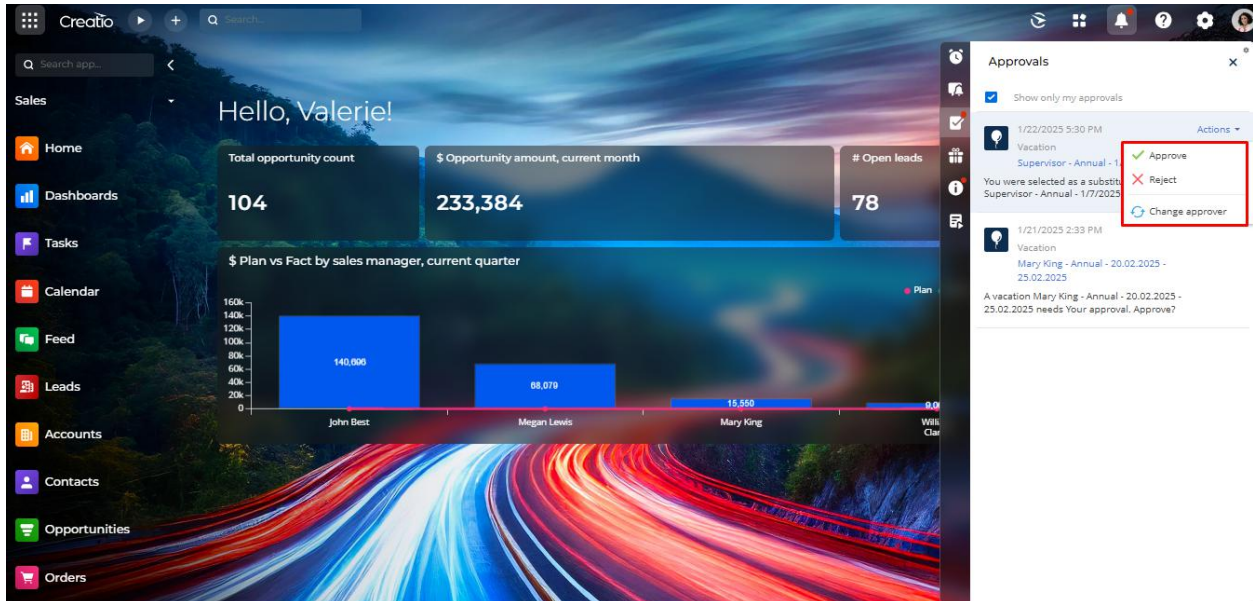
Available vacation -5 days

Approvals list

Approver	Approval purpose	Status	Comment
V.Murphy	You were selected as a...	To set	

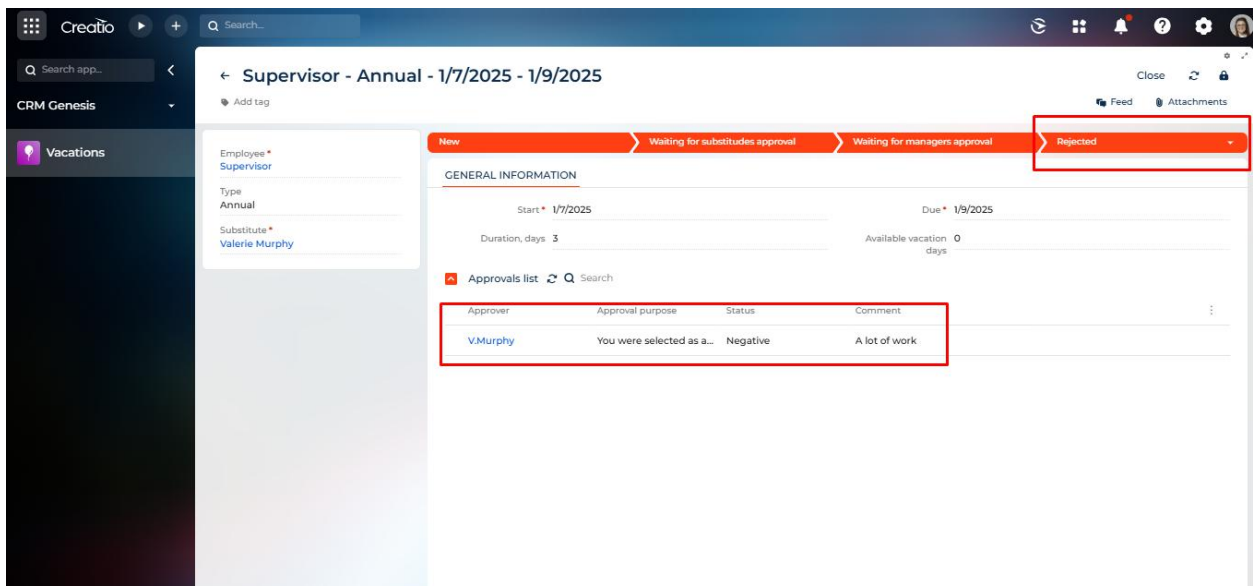
Confirmation of vacation by a substitute

- The substitute receives a visa for approval, where he has two options: Approve or Reject.



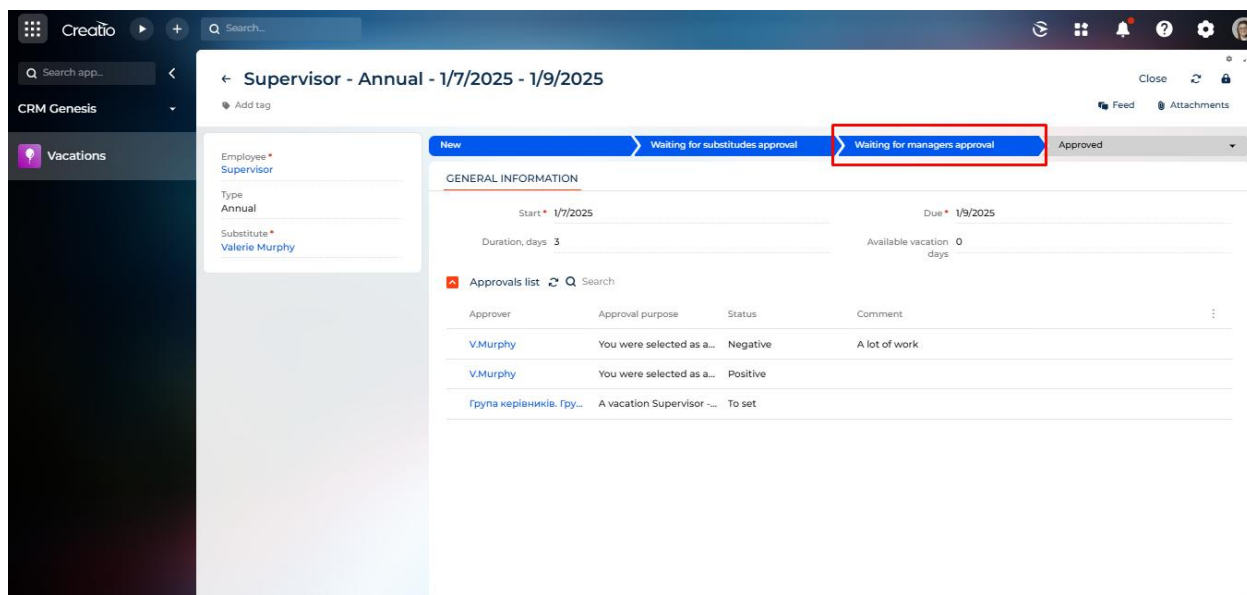
The screenshot shows the CRM Genesis dashboard with a sidebar on the left containing navigation links: Home, Dashboards, Tasks, Calendar, Feed, Leads, Accounts, Contacts, Opportunities, and Orders. The main area displays a greeting 'Hello, Valerie!' and three key metrics: Total opportunity count (104), \$ Opportunity amount, current month (233,384), and # Open leads (78). Below these is a bar chart titled '\$ Plan vs Fact by sales manager, current quarter' showing data for John Best (140,000), Megan Lewis (98,070), and Mary King (15,550). On the right, an 'Approvals' panel is open, showing a notification for a vacation approval. The notification includes the date '1/22/2025 5:30 PM', the subject 'Vacation Supervisor - Annual - 1/7/2025', and the message 'You were selected as a substitute Supervisor - Annual - 1/7/2025'. Below the message, there are two buttons: 'Approve' (with a green checkmark icon) and 'Reject' (with a red X icon). A red box highlights these two buttons.

- If the substitute rejects the visa, the vacation will go to a Rejected stage.



The screenshot shows the 'Supervisor - Annual - 1/7/2025 - 1/9/2025' record in the CRM Genesis system. The record is displayed in a form with a sidebar on the left containing navigation links: Home, Dashboards, Tasks, Calendar, Feed, Leads, Accounts, Contacts, Opportunities, and Orders. The main area shows the record details, including the employee name 'Valerie Murphy', the type 'Annual', and the duration '3 days'. The status is 'Rejected', which is highlighted by a red box. Below the status, there is a table titled 'Approvals list' with columns: Approver, Approval purpose, Status, and Comment. The table contains one row with the following data: Approver 'V.Murphy', Approval purpose 'You were selected as a...', Status 'Negative', and Comment 'A lot of work'. A red box highlights this row.

- If the substitute confirms the visa, the vacation approval will move to the Waiting for manager approval stage



Supervisor - Annual - 1/7/2025 - 1/9/2025

Employee *
Supervisor

Type
Annual

Substitute *
Valerie Murphy

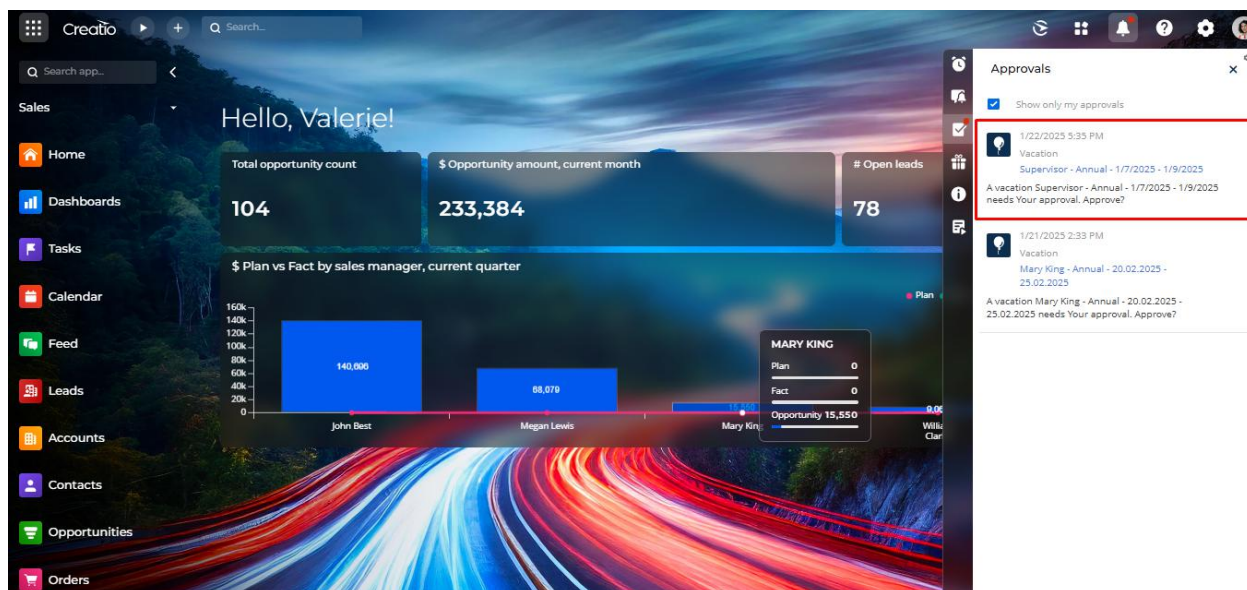
Start * 1/7/2025 Due * 1/9/2025

Duration, days 3 Available vacation 0 days

Approvals list

Approver	Approval purpose	Status	Comment
V.Murphy	You were selected as a...	Negative	A lot of work.
V.Murphy	You were selected as a...	Positive	
Група керівників. Гр...	A vacation Supervisor ~...	To set	

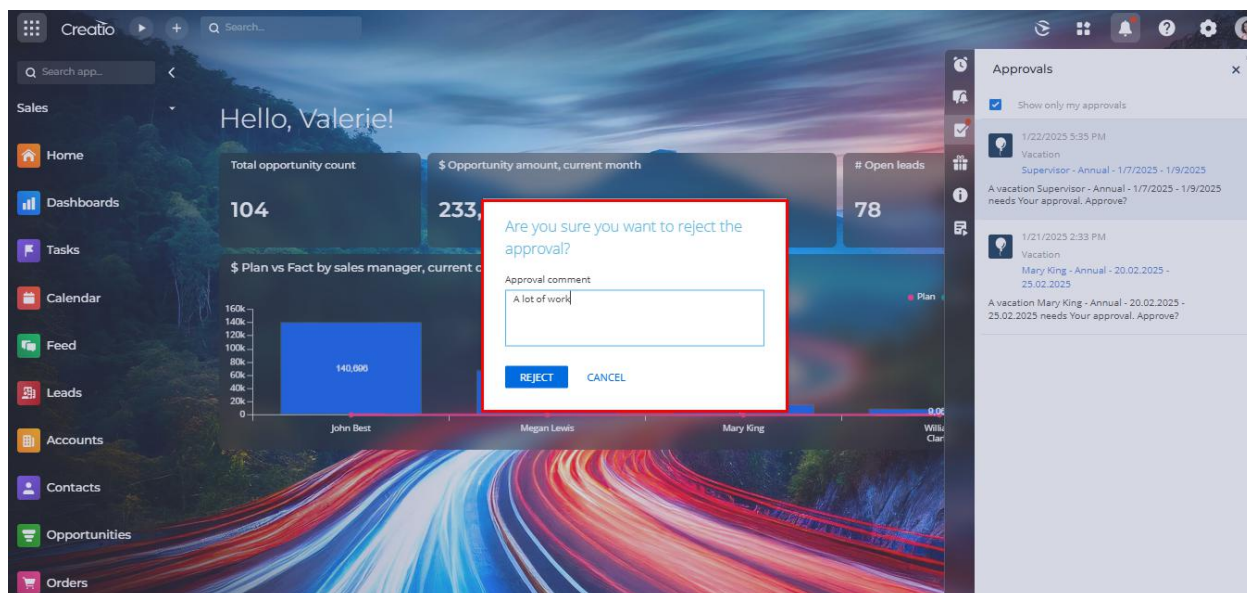
- A vacation confirmation visa will be sent to a manager role.



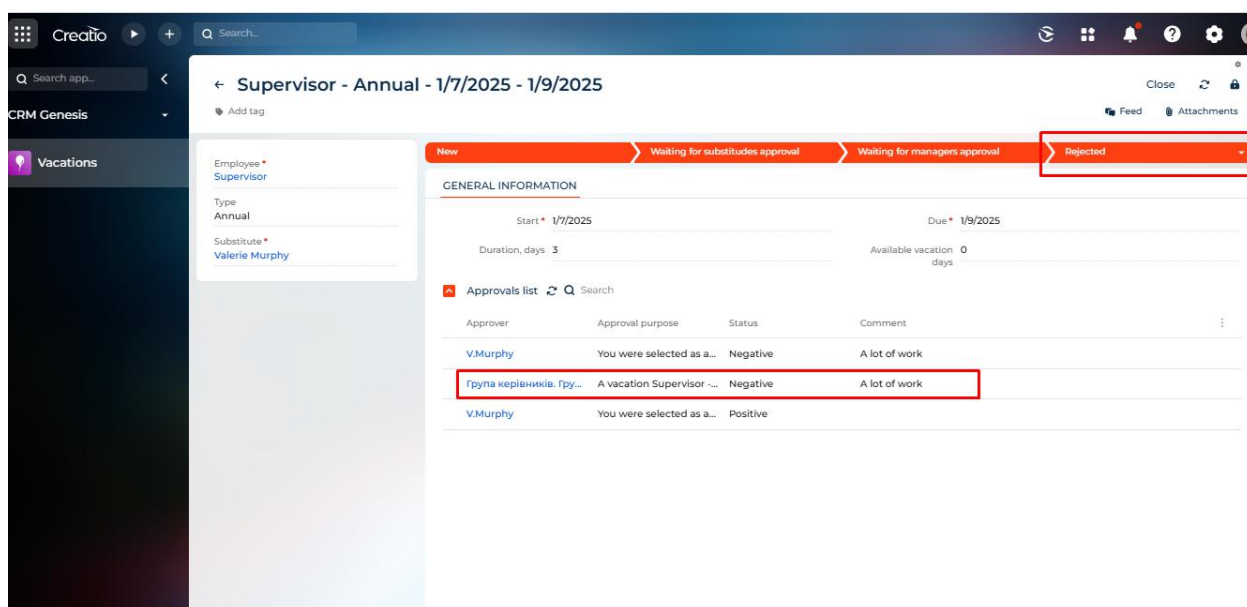
Approvals

- 1/22/2025 5:35 PM
Vacation
Supervisor - Annual - 1/7/2025 - 1/9/2025
A vacation Supervisor - Annual - 1/7/2025 - 1/9/2025 needs Your approval. Approve?
- 1/21/2025 2:33 PM
Vacation
Mary King - Annual - 20.02.2025 - 25.02.2025
A vacation Mary King - Annual - 20.02.2025 - 25.02.2025 needs Your approval. Approve?

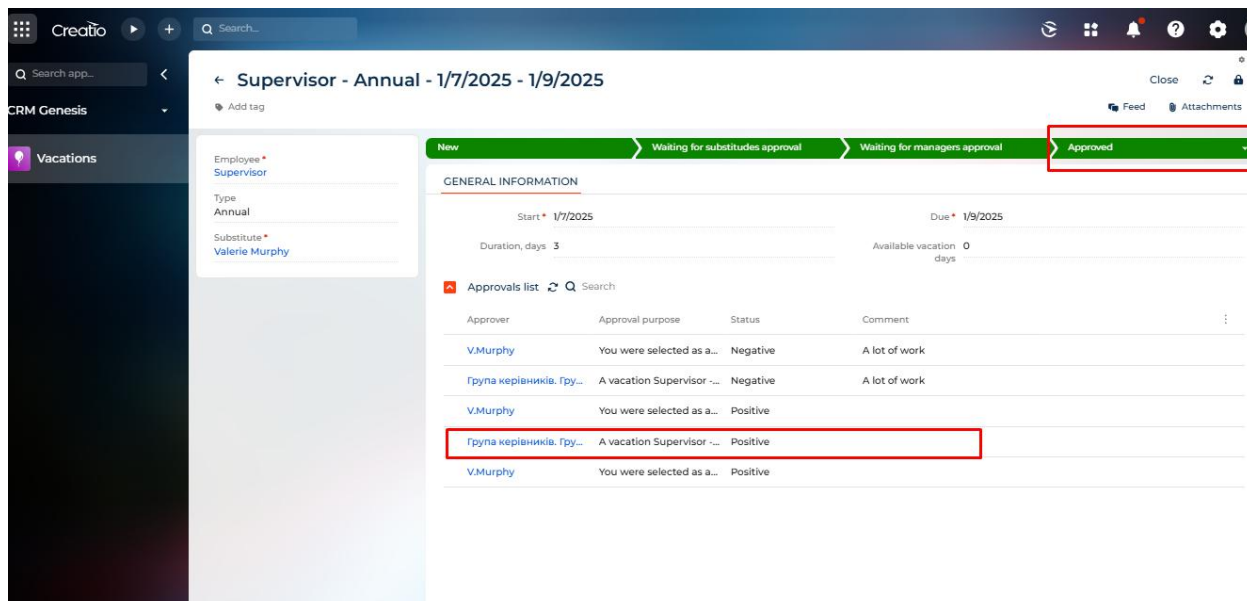
- If the manager rejects it



- The vacation will go to the Rejected stage



- If the manager confirms it, the vacation will go to the Approved stage



Supervisor - Annual - 1/7/2025 - 1/9/2025

Employee: **Supervisor**

Type: **Annual**

Substitute: **Valerie Murphy**

Duration, days: **3**

Available vacation days: **0**

Start: **1/7/2025**

Due: **1/9/2025**

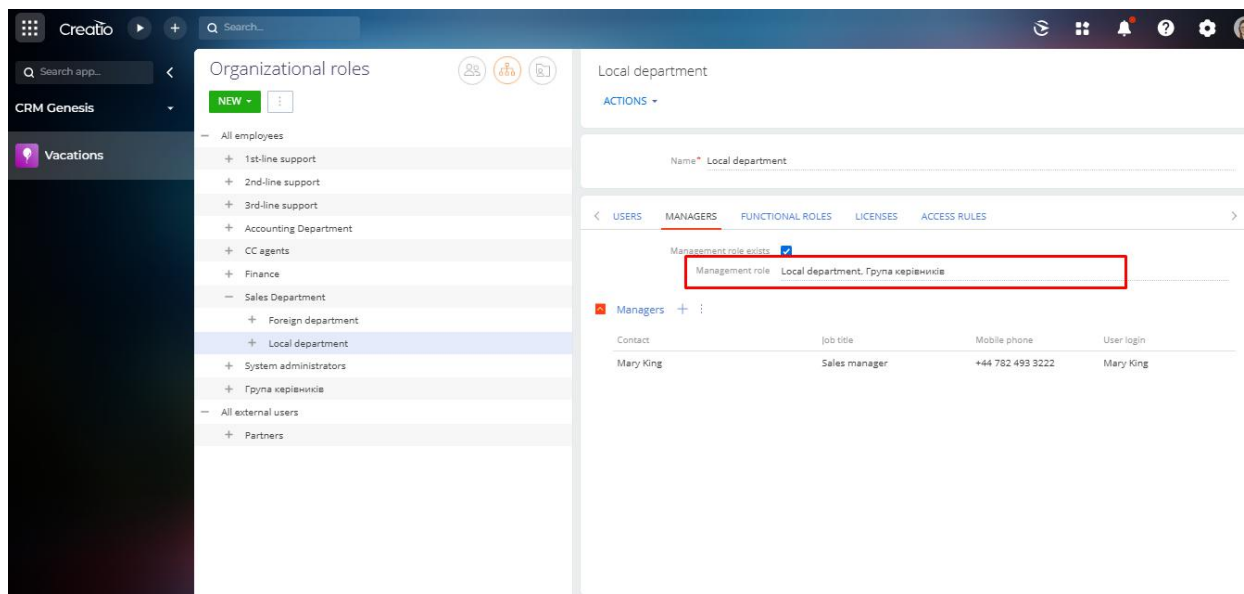
Approvals list

Approver	Approval purpose	Status	Comment
V.Murphy	You were selected as a...	Negative	A lot of work
Група керівників, Гр...	A vacation Supervisor ...	Negative	A lot of work
V.Murphy	You were selected as a...	Positive	
Група керівників, Гр...	A vacation Supervisor ...	Positive	
V.Murphy	You were selected as a...	Positive	

If vacation was rejected, you can set it only to a Waiting for substitute approval stage to start the confirmation process from the beginning.

The logic of choosing a manager role for an approval

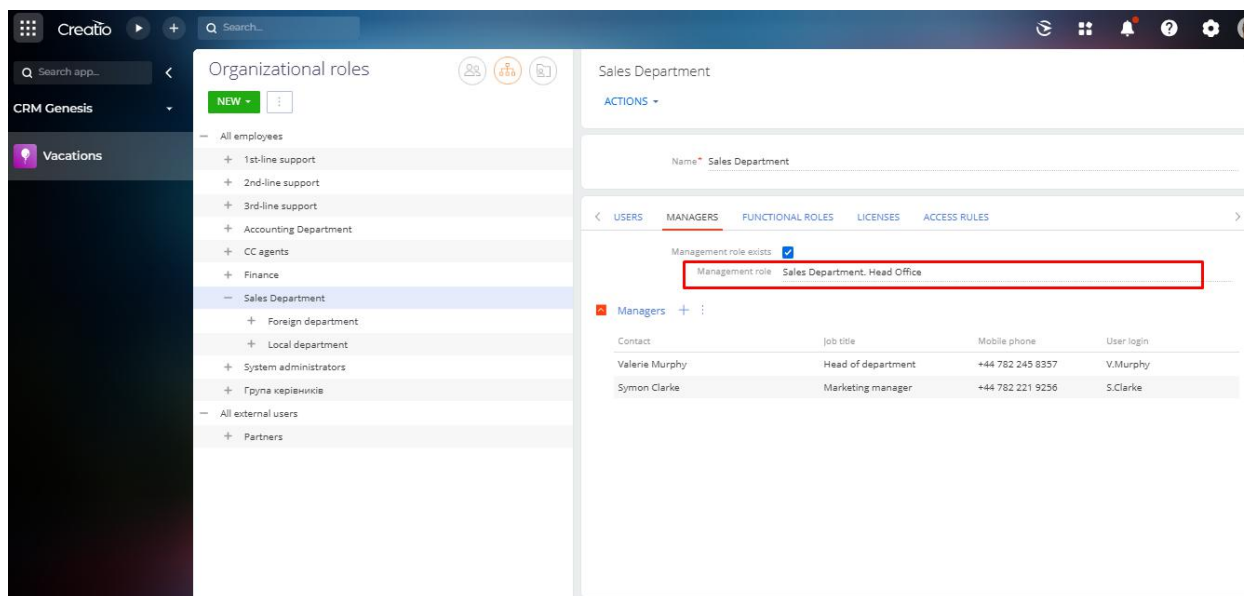
- For employees, who are participants in a certain role, management role will receive a vacation approval visa



The screenshot shows the 'Organizational roles' section in the CRM Genesis interface. The 'Local department' role is selected. The 'Management role' is set to 'Local department. Група керівників'.

Contact	Job title	Mobile phone	User login
Mary King	Sales manager	+44 782 493 3222	Mary King

- For employees, who are participants in a certain management role, a management role from the previous level in the branch will receive a vacation approval visa



The screenshot shows the 'Organizational roles' section in the CRM Genesis interface. The 'Sales Department' role is selected. The 'Management role' is set to 'Sales Department. Head Office'.

Contact	Job title	Mobile phone	User login
Valerie Murphy	Head of department	+44 782 245 8357	V.Murphy
Symon Clarke	Marketing manager	+44 782 221 9256	S.Clarke

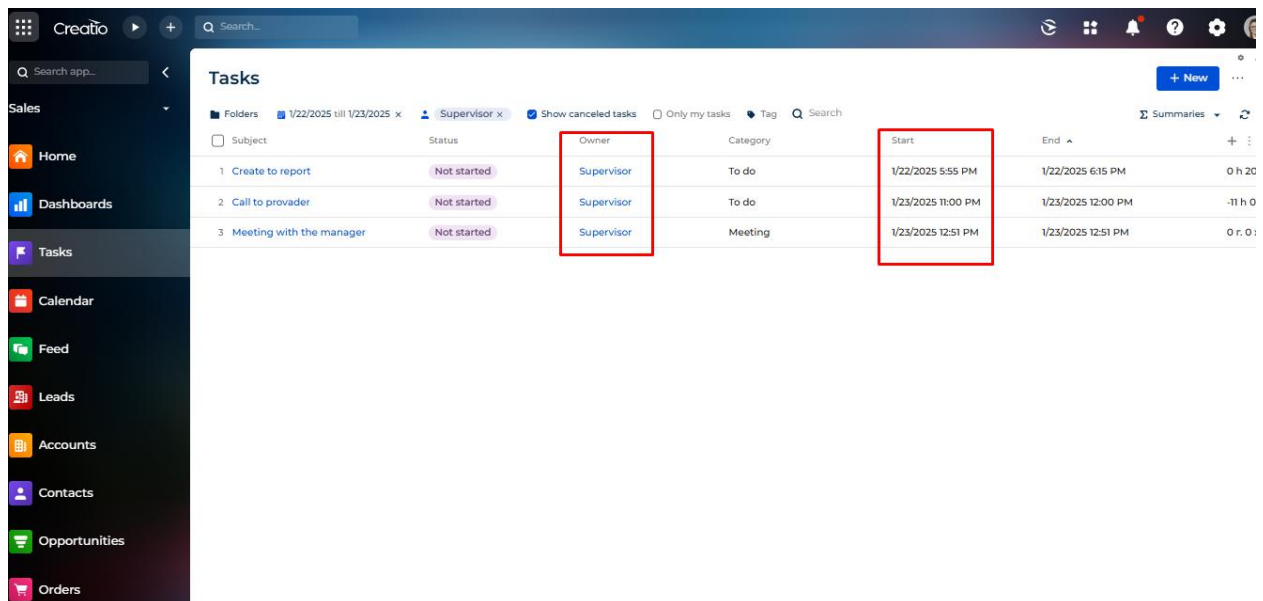
If an employee is included in several roles, the manager will be selected randomly.

Replacement of a activity owner after approval of the vacation

After the vacation was approved, in all activities where the employee is an owner, a substitute will become a new owner.

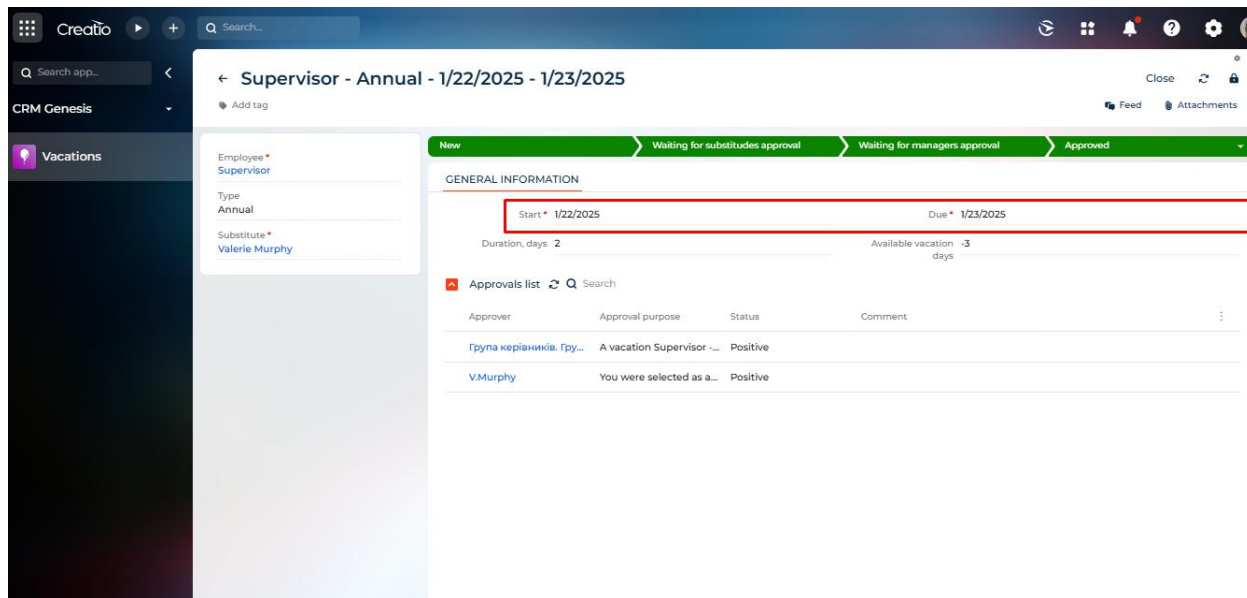
The changes will be applied only to the activities where the start and/or end date matches the vacation period.

- For example, an employee has activities for several days



Subject	Status	Owner	Category	Start	End	Duration
1 Create to report	Not started	Supervisor	To do	1/22/2025 5:55 PM	1/22/2025 6:15 PM	0 h 20
2 Call to provader	Not started	Supervisor	To do	1/23/2025 11:00 PM	1/23/2025 12:00 PM	-11 h 0
3 Meeting with the manager	Not started	Supervisor	Meeting	1/23/2025 12:51 PM	1/23/2025 12:51 PM	0 r. 0:

- He created a vacation for two days (22th and 23th of January)



CRM Genesis

Vacations

Supervisor - Annual - 1/22/2025 - 1/23/2025

Employee * Supervisor

Type Annual

Substitute * Valerie Murphy

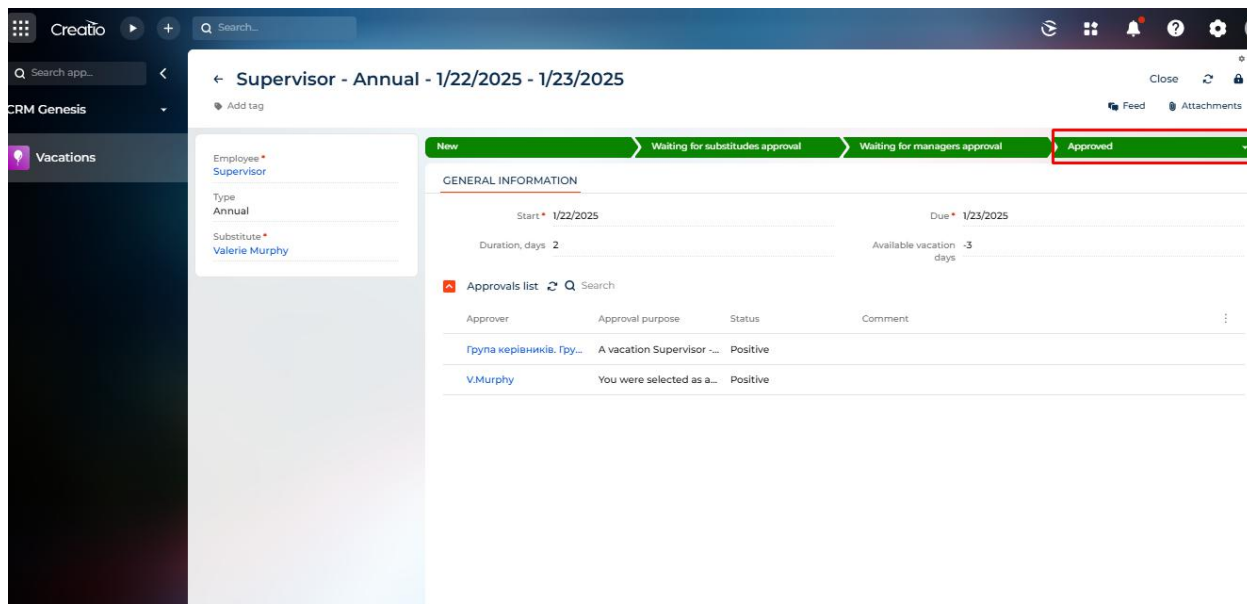
Start * 1/22/2025 Due * 1/23/2025

Duration, days 2 Available vacation days -3

Approvals list

Approver	Approval purpose	Status	Comment
Група керівників, гру...	A vacation Supervisor ~...	Positive	
V.Murphy	You were selected as a...	Positive	

- Vacation has been approved



CRM Genesis

Vacations

Supervisor - Annual - 1/22/2025 - 1/23/2025

Employee * Supervisor

Type Annual

Substitute * Valerie Murphy

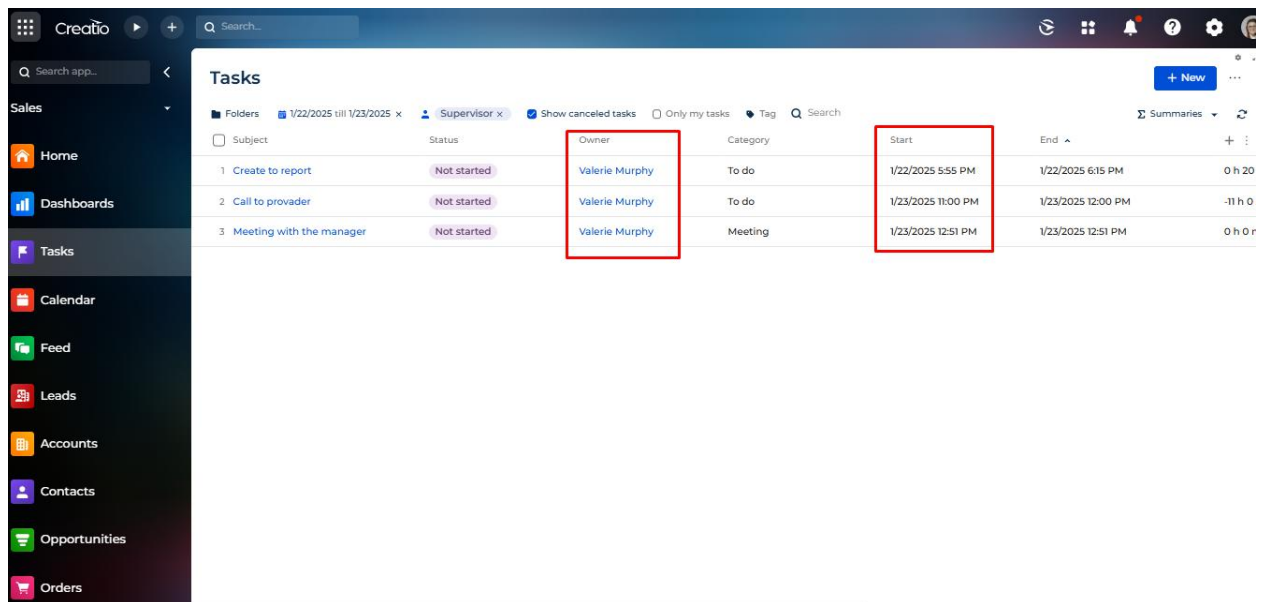
Start * 1/22/2025 Due * 1/23/2025

Duration, days 2 Available vacation days -3

Approvals list

Approver	Approval purpose	Status	Comment
Група керівників, гру...	A vacation Supervisor ~...	Positive	
V.Murphy	You were selected as a...	Positive	

- The owner was changed to a substitute for activities that will take place during employee's vacation

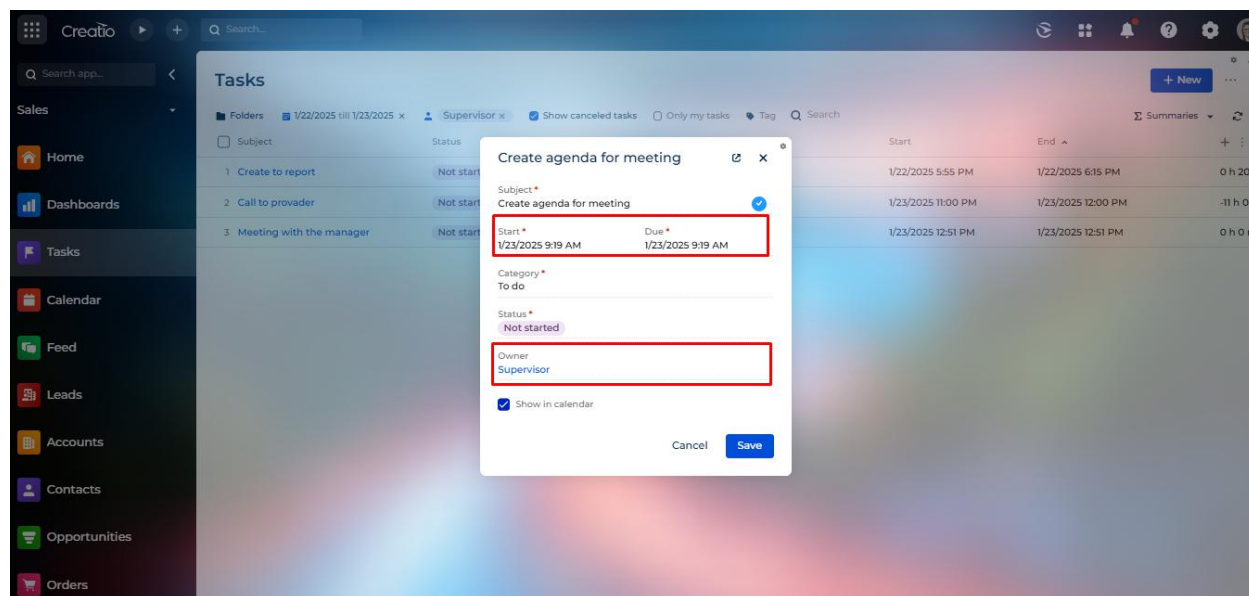


Subject	Status	Owner	Category	Start	End	Duration
1 Create to report	Not started	Valerie Murphy	To do	1/22/2025 5:55 PM	1/22/2025 6:15 PM	0 h 20
2 Call to provader	Not started	Valerie Murphy	To do	1/23/2025 11:00 PM	1/23/2025 12:00 PM	-11 h 0
3 Meeting with the manager	Not started	Valerie Murphy	Meeting	1/23/2025 12:51 PM	1/23/2025 12:51 PM	0 h 0 r

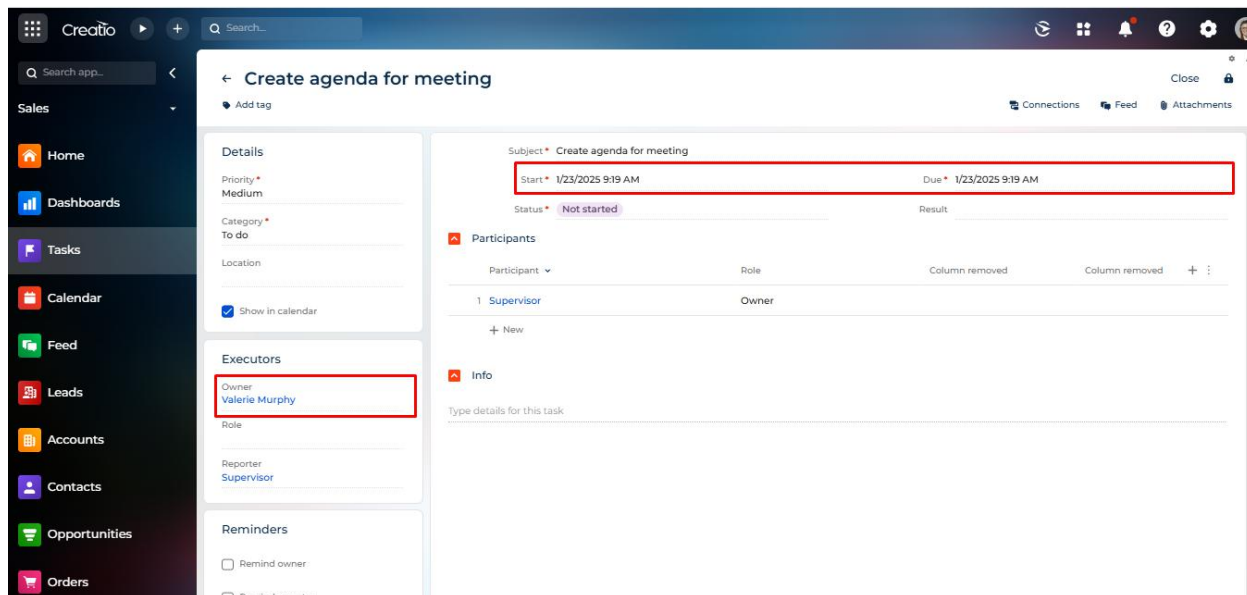
Replacing the owner when creating an activity when there is an approved vacation

When the activity is being saved, the system performs a check to see if the owner currently has an approved vacation for the time of the activity. If he has, the owner will be replaced by a substitute.

- If you create an activity for the time when an employee has an approved vacation



- The owner will be automatically replaced by a substitute



Create agenda for meeting

Subject * Create agenda for meeting

Start * 1/23/2025 9:19 AM Due * 1/23/2025 9:19 AM

Status * Not started Result

Participants

Participant	Role	Column removed	Column removed	+	:
1 Supervisor	Owner				

+ New

Info

Type details for this task

Details

Priority * Medium

Category * To do

Location

☒ Show in calendar

Executors

Owner Valerie Murphy

Role

Reporter Supervisor

Reminders

☐ Remind owner

☐ Remind reporter

Our contacts: +38 (044) 200-04-22 ceo@crmgenesis.com <https://crmgenesis.com>