

Product description

Proposal Builder for Creatio is a tool that helps to create deals\contracts\proposals with the loyalty programs having suitable conditions for a particular customer. You can set the programs with their conditions in Creatio and add them to your contracts with the help of a business process.

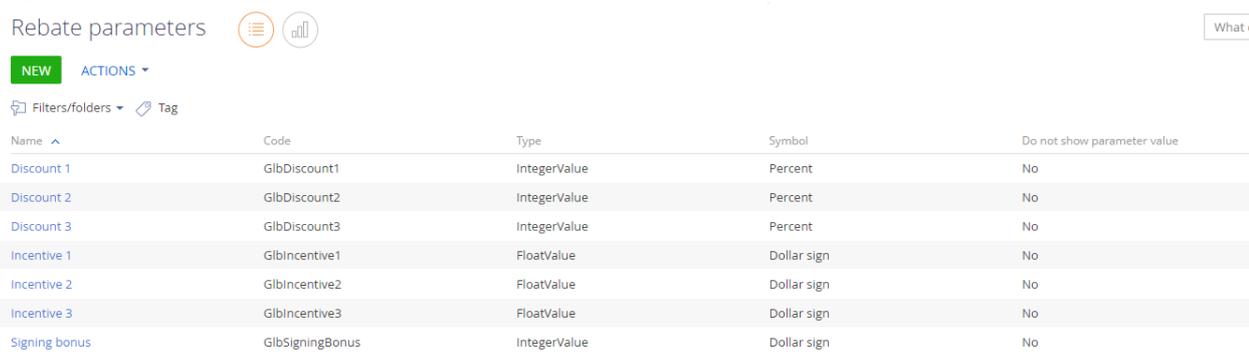
Key features:

- Custom sections, lookups, system settings and scripts that enable the users to configure programs, their parameters, discounts, approvers and allow system administrators to manage non-structural changes with no-code tools
- Business process program selection page
- Business process user task that maps the program conditions into your contract page

Setup guide

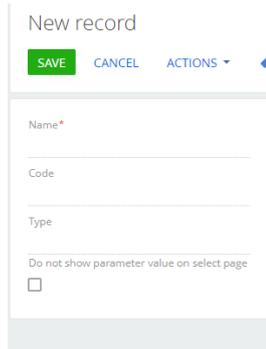
1. Set the rebates proposal sections with settings visible for your user role.
Go to Workplace setup -> Rebates -> User groups -> add the role -> re-login to the system
2. Go to Rebate parameters section and create your program parameters.

E.g.



Name	Code	Type	Symbol	Do not show parameter value
Discount 1	GlbDiscount1	IntegerValue	Percent	No
Discount 2	GlbDiscount2	IntegerValue	Percent	No
Discount 3	GlbDiscount3	IntegerValue	Percent	No
Incentive 1	GlbIncentive1	FloatValue	Dollar sign	No
Incentive 2	GlbIncentive2	FloatValue	Dollar sign	No
Incentive 3	GlbIncentive3	FloatValue	Dollar sign	No
Signing bonus	GlbSigningBonus	IntegerValue	Dollar sign	No

Fields description:



New record

SAVE CANCEL ACTIONS

Name*

Code

Type

Do not show parameter value on select page

Name – name of the parameter that will be visible on the process page

Code – code of the parameter. It will be used in the next settings later in this setup

Type – field type (integer, decimal, text, etc.)

Do not show the parameter – if true, a particular parameter value will not be visible on the process page. E.g.:

Program 1	Program 2	Program 3
Product launch Signing bonus \$1000 Growth incentives Incentive 1 \$2000 Conditional discounts Discount 1 Discount 2 3%	Product launch Signing bonus \$2500 Growth incentives Incentive 1 \$2000 Incentive 2 \$3000 Conditional discounts Discount 1 Discount 2 5%	Product launch Signing bonus \$5000 Growth incentives Incentive 1 \$2000 Incentive 3 \$3000 Incentive 2 \$5000 Conditional discounts Discount 1 Discount 2 5% Discount 3 7%
SELECT	SELECT	SELECT

3. Go to Rebate parameter groups section and create the groups for your parameters. The groups hold particular set of parameters described above.

Fields description:

Name – group name

Do not show parameter values on select page – if true, values of the entire set of parameters will not be visible. E.g.:

Program 1	Program 2	Program 3
Product launch Signing bonus \$1000 Growth incentives Incentive 1 Conditional discounts Discount 1 2% Discount 2 3%	Product launch Signing bonus \$2500 Growth incentives Incentive 1 Incentive 2 Conditional discounts Discount 1 3% Discount 2 5%	Product launch Signing bonus \$5000 Growth incentives Incentive 1 Incentive 3 Incentive 2 Conditional discounts Discount 1 3% Discount 2 5% Discount 3 7%
SELECT	SELECT	SELECT

Show message instead of group parameters – if true – you can choose some specific text instead of parameter values visible for the users. E.g.:

Program 1	Program 2	Program 3
Product launch Signing bonus \$1000 Growth incentives Some text instead of the parameters values Conditional discounts Discount 1 2% Discount 2 3%	Product launch Signing bonus \$2500 Growth incentives Some text instead of the parameters values Conditional discounts Discount 1 3% Discount 2 5%	Product launch Signing bonus \$5000 Growth incentives Some text instead of the parameters values Conditional discounts Discount 1 3% Discount 2 5% Discount 3 7%
SELECT	SELECT	SELECT

4. Go to Rebate programs section and create all your programs

5. Add the groups created above in the *Parameter group in program* detail

The screenshot shows two views of a program configuration. On the left, the 'Program 3' detail page shows fields for Name, Start date (9/12/2023), and End date (9/30/2023). Below these fields, a 'Parameter group in program' section is visible, with a dropdown menu currently set to 'Product launch'. On the right, a 'Program 3' configuration page shows a 'Name' field with 'Program 3', 'Start date' (9/12/2023), and 'End date' (9/30/2023). Below this, a 'Parameter group in program' field is highlighted with a red box, showing a plus sign and a colon icon. To the right of this field, a list of parameter groups is visible, including 'Product launch', 'Growth incentives', and 'Conditional discounts'.

6. Single click on the added group. You can move the group up and down to choose its order on the process page:

7. Double click on the program group to get into the parameters values settings. Here you can select the required group parameters and define their values as well as the order on the page.

Program 1		Program 2		Program 3	
Product launch		Product launch		Growth incentives	
Signing bonus	\$1000	Signing bonus	\$2500	Incentive 1	\$2000
				Incentive 3	\$3000
				Incentive 2	\$5000
Growth incentives		Growth incentives		Product launch	
Incentive 1	\$2000	Incentive 1	\$2000	Signing bonus	\$5000
Incentive 2	\$3000	Incentive 2	\$3000		
Conditional discounts		Conditional discounts		Conditional discounts	
Discount 1	2%	Discount 1	3%	Discount 1	3%
Discount 2	3%	Discount 2	5%	Discount 2	5%
				Discount 3	7%

Program 3 / Parameter group in program

Program* Program 3 Group* Growth incentives

PARAMETER IN GROUP

Parameters			
Incentive 1	2,000.00	DELETE	↑ ↓
Incentive 3	3,000.00	DELETE	↑ ↓
Incentive 2	5,000.00	DELETE	↑ ↓

The programs settings are finished.

Final step – set the process user task mapping to migrate the parameter values from programs to contract.

8. Go to Lookups -> Program to entity mapping and create the new mapping.

-Give it any relevant name.

-Choose Contract object in the Schema.

9. Add mappings in *Program to entity mapping items* detail.

- Select fields from the contract page which you want to populate from program.

- Program parameter code – the code of created parameter in step 2 above.

Rebate parameters

NEW ACTIONS

Filters/folders Tag

Name	Code
Discount 1	GlbDiscount1
Discount 2	GlbDiscount2
Discount 3	GlbDiscount3
Incentive 1	GlbIncentive1
Incentive 2	GlbIncentive2
Incentive 3	GlbIncentive3
Signing bonus	GlbSigningBonus

Result

Program to contract mapping

CLOSE

Name* Program to contract mapping	Schema* Contract
Program to entity mapping items + :	Contract page columns
Program parameter code Parameters codes	Schema column name
GlbDiscount3	UsrDiscount3
GlbIncentive2	UsrIncentive2
GlbSigningBonus	UsrSigningBonus
GlbDiscount1	UsrDiscount1
GlbIncentive3	UsrIncentive3
GlbDiscount2	UsrDiscount2
GlbIncentive1	UsrIncentive1

Business process example

The sample process creates the new contract. After creation, a user gets the program selection page. Once selected, the user task will map all program data into the correspondent fields on the contract.



Add data

Create contract

Which object to add data to?
Contract

What is the data adding mode?
Add one record

Which column values to set?
Our company
[#Lookup.Account.Our company.e308b781-3c5b-4ecb-89ef-5
Account
[#Lookup.Account.Accom (sample).405947d0-2ffb-4ded-867-5
+ Add field

Read data

Get created contract data

Which data read mode to use?
Read the first record in the selection

Which object to read data from?
Contract

How to filter records?
Actions ▾
 AND Id = Create contract.Created record Id
+ Add condition

How to sort records?
Number Ascending
+ Add

What record data should the process read?
Read data from selected columns only
Account
Id
+ Add column

Read data

Read program to entity mapping lookup

Which data read mode to use?
Read the first record in the selection

Which object to read data from?
Program to entity mapping

How to filter records?
Actions ▾
 AND Name = Program to contract mapping
+ Add condition

How to sort records?
Name Ascending
+ Add

What record data should the process read?
Read data from all columns

Pre-configured page ⋮ ? ×

Choose the program

Which page to open?

Create your proposal - Step 2 | GIBClientUnit_ff902d6 ↗

Who performs the task?

User

Contact

[#System variable.Current user contact#]

Show page automatically

Recommendations for filling out the page

User hints

Which record to connect the page to?

Connected object

Record of connected object

Page parameters

🔍 Account

🔗 [#Get created contract data.First item of resulting colle...

0.5 Estimated spend

🔗 Select value

🔍 Program

🔗 Select value

Run following elements in the background

Log activity

User task ⋮ ? ×

Program to entity mapper (user task)

Which user task to perform?

Program to entity mapper (user task) ↗

Process element parameters

Id Entity record ID*

🔗 [#Create contract.Created record Id#]

🔍 Mapping*

🔗 [#Read program to entity mapping lookup.First item of...

🔍 Program*

🔗 [#S.Program#]

Run current and the following elements in the background

Result:

1. A user selects program #3

Create your proposal - Step 2 Whi

NEXT BACK

Account Accom (sample) Estimated spend 0.00

Program Program 3

Program 1	Program 2	Program 3
Product launch	Product launch	Product launch
Signing bonus \$1000	Signing bonus \$2500	Signing bonus \$5000
Growth incentives	Growth incentives	Growth incentives
Incentive 1 \$2000	Incentive 1 \$2000	Incentive 1 \$2000
	Incentive 2 \$3000	Incentive 3 \$3000
		Incentive 2 \$5000
Conditional discounts	Conditional discounts	Conditional discounts
Discount 1 2%	Discount 1 3%	Discount 1 3%
Discount 2 3%	Discount 2 5%	Discount 2 5%
		Discount 3 7%
SELECT	SELECT	SELECT

2. The program data is moved to the created contract

4

CLOSE ACTIONS 

Number 4

Type* Contract

Start date* 9/12/2023

< GENERAL INFORMATION CONTRACT DETAILS **LOYALTY PROGRAM** HISTORY APPR

 **Product launch**

Signing bonus 5,000

 **Growth incentives**

Incentive 1 2,000.00

Incentive 2 5,000.00

Incentive 3 3,000.00

 **Conditional discounts**

Discount 1 3

Discount 2 5

Discount 3 7