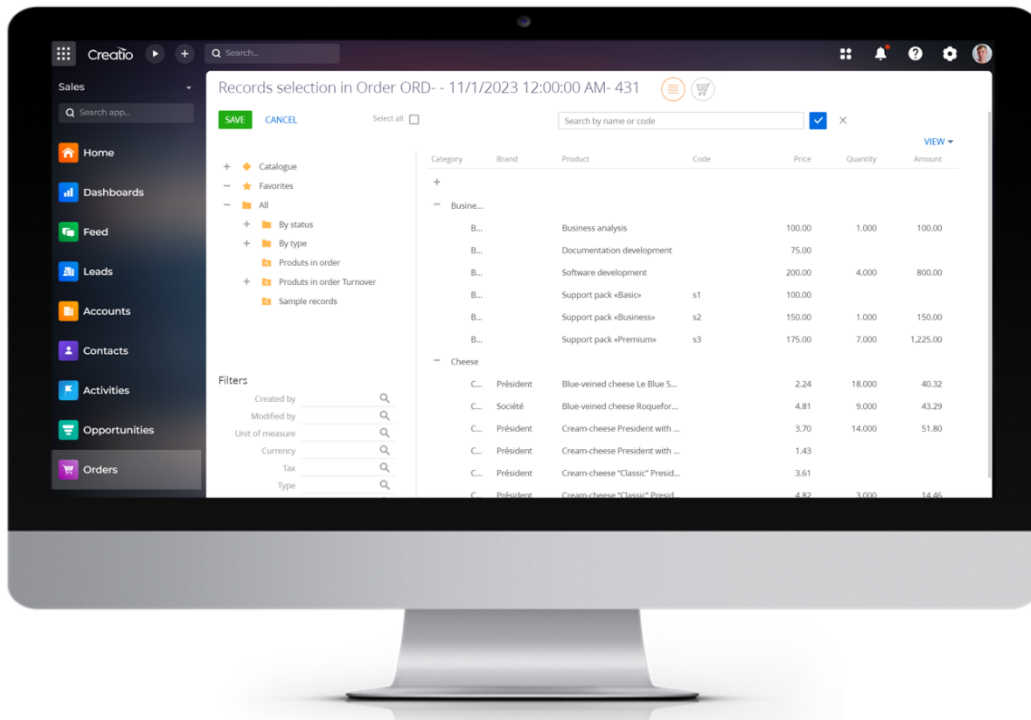




SALES'UP CATALOG SELECTION ENHANCEMENTS FOR CREATIO



Guide to setup and utilization

16.11.2023

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Product description

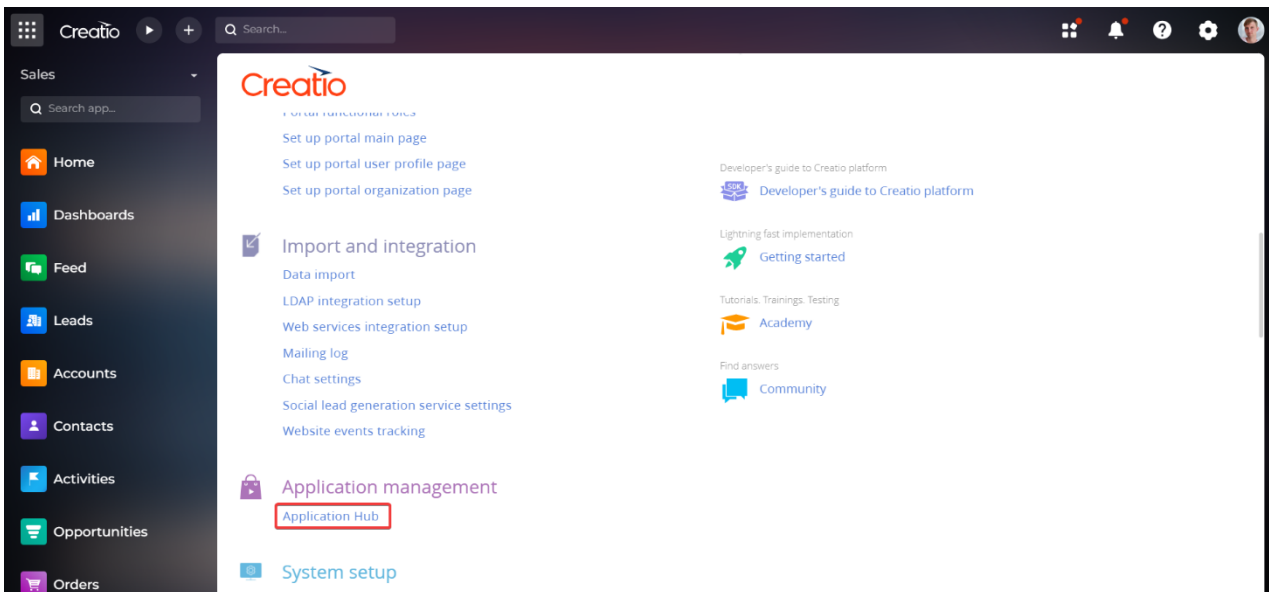
The **Catalog selection enhancements for Creatio** product is designed to simplify the work with catalogues in the system. It helps to automatically filter the necessary records, set up a selection hierarchy, conveniently and quickly add the necessary records to the detail.

Use cases

- Automatically filter the products in the assortment according to the terms of the contract, the client and their needs, so that the selection page does not display all the products in the system, but only those that meet the filter criteria;
- Organize the list into a tree-like scheme and add all positions with one click;
- Offer two ways of a product selection from the selection page to the part;
- Sort products on the selection page by column;
- Configure filtering not only for object records, but also for the list of products;
- Set up price history filtering for parts depending on the conditions on the main object, contract;
- Specify quick-search columns;
- Set up automatic recalculation of the product price, depending on the contract currency;

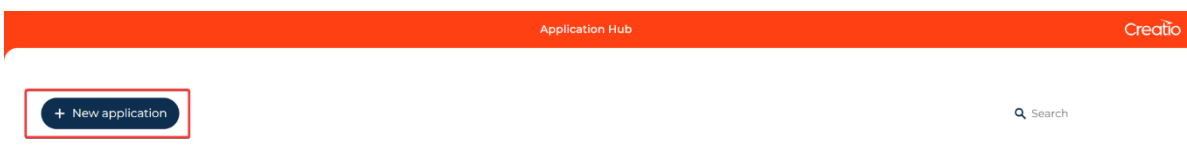
Product installation

To install packages, click the  button and go to the "Application Hub".

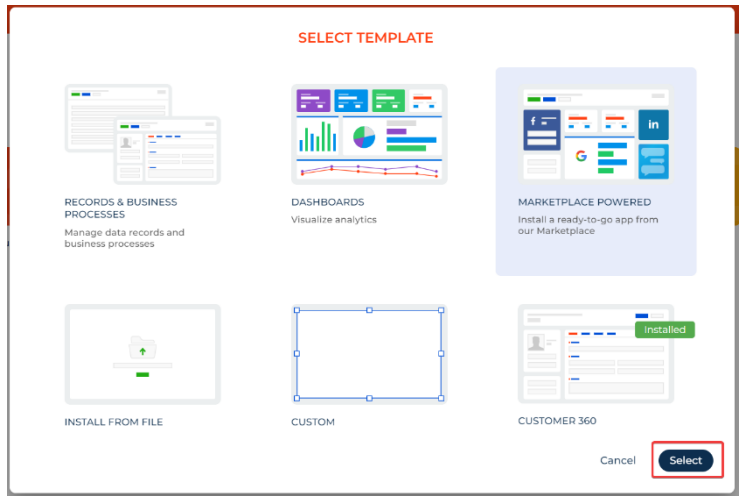


Next, go to the "Application Hub" section.

On the "Application Hub" page, click "New application",



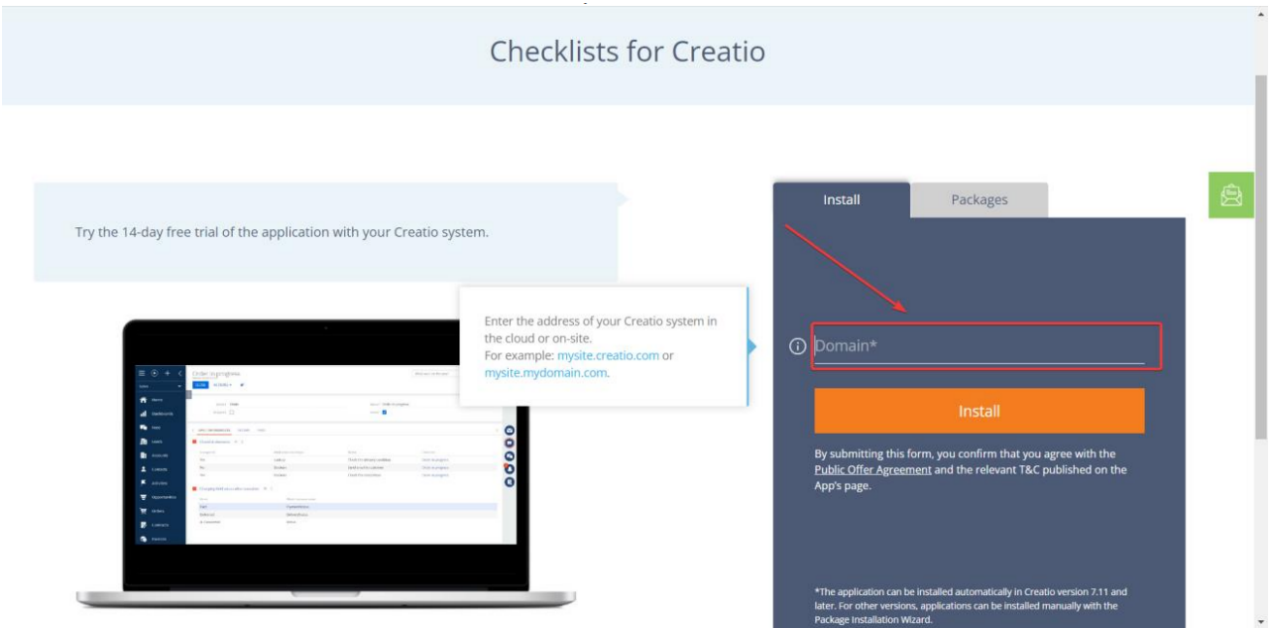
Select the "Marketplace powered" block and click the "Select" button.



Click the "Install" button on the product page.

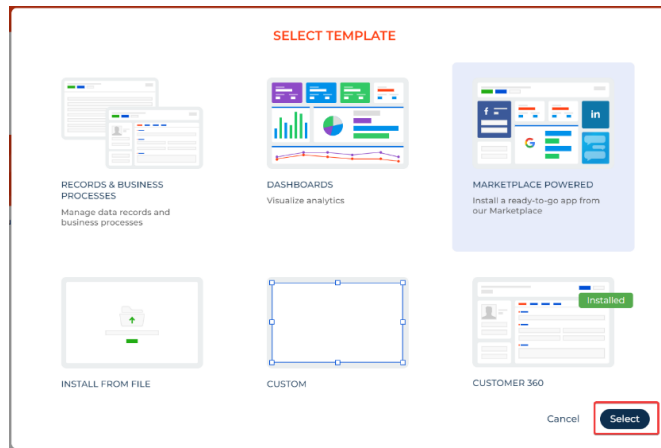


Enter the address of the Creatio website where you want to install the product.



After the installation is complete, the Creatio website login page will open.

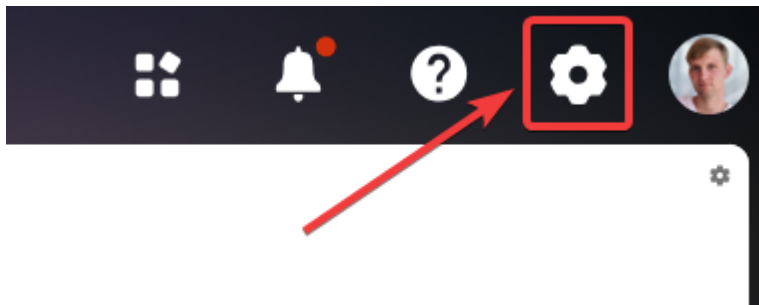
If you are installing a product package from a file, you need to make sure that the file installs the current solution package or request the latest package from Sales'Up support. Next, on the "Application Hub" page, click "New Application" and select "Install from file", specify the path to the archive with the package and install it.



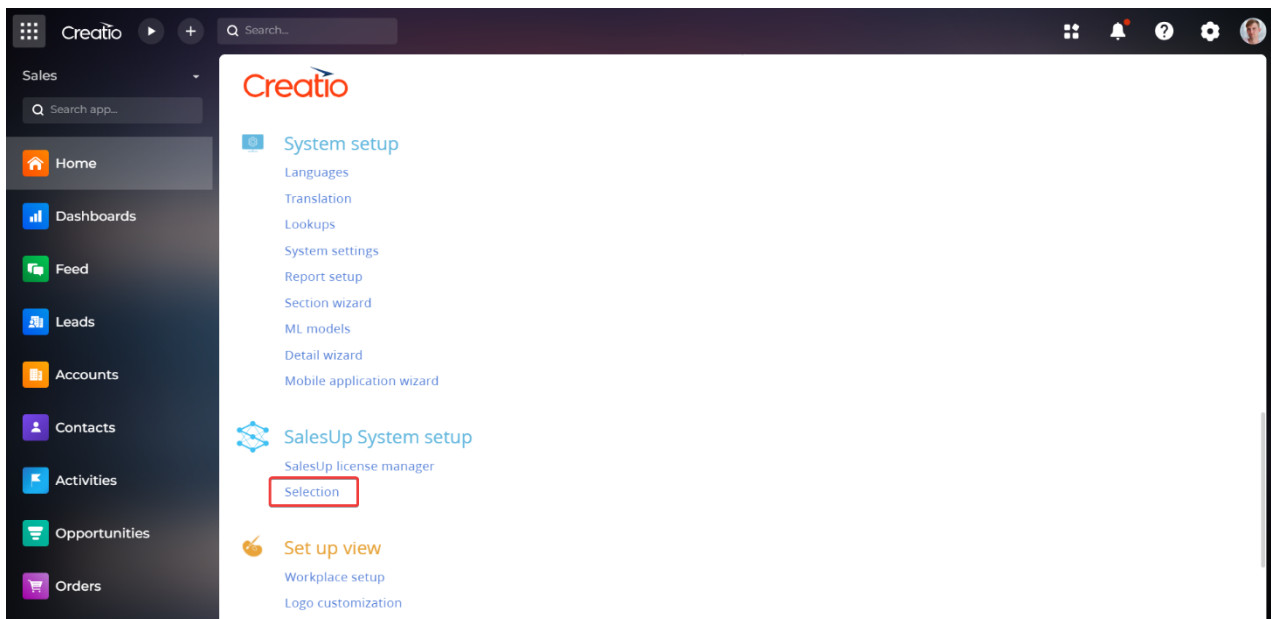
Selection setup

Creation of a new selection setup

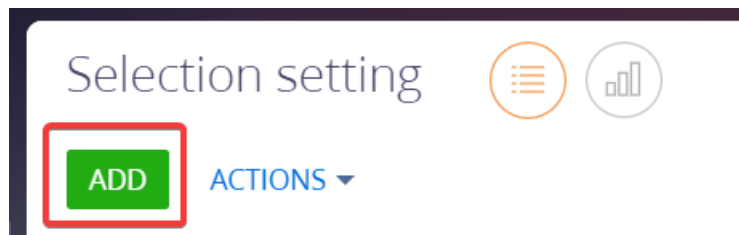
After installing the product, go to System designer to create a new selection setup



Next, in the "Sales'Up System setup" block, select "Selection":



In the section registry, click the "Add" button:



Filling in a page profile

On the setting page, there are following fields:

- Name – filled in automatically based on the basic settings;
- Selection page title – a text field, the value of which will be displayed on the selection page. In the example below, in the "Selection page title" field, the value "Selection of products in TM Activity {0}" is specified, where "Selection of products in TM Activity" is the printed text, and {0} is the name of the object record, in our example - the name of TM Activity. If the name of TM Activity is "Novelty - 4/6/2023", the selection page will be named accordingly;

Product	Category	Brand	Price list price	Planned qua...	Planned Income
Aerted dessert 3,4% Cherry fu...	Yogourts & desserts	Dolce	5.00		
Asus R9280X-DC2T-3GD5	Hardware	Asus	450.00		
Auto Loan	Lending		0.00		
Battery Back-up System APC ...	Peripherals	APC	196.95		
Battery Back-up System APC ...	Peripherals	APC	440.79		
Battery Back-up System APC ...	Peripherals	APC	885.24		
Blue-veined cheese Le Blue 5...	Cheese	Président	2.24	2,500.00	5,600.00
Blue-veined cheese Roquefor...	Cheese	Société	4.81		
Business Loan	Lending		0.00		
Business analysis	Business services		100.00		
CRM bundle			0.00		

- Disabled – deactivation of the setting. If the value = TRUE - the setting is disabled;
- Desktop – if the value = TRUE – the setting will be applied to the desktop version of Creatio;
- Mobile – if the value = TRUE – the setting will be applied to the mobile version of Creatio;

Main settings

Object

Detail

Selection object

- Object – lookup field, select the object on which the setting is being created;
- Detail – lookup field, select a detail on the object on which selection will be applied;
- Selection object – lookup field, select the selection object that will be configured.

In our example, the object on which the setting is created is Order. The setting is applied to the details of the Products, on the Product selection page.

Product	Quantity	Unit of mea...	Price	Discount, %	Total	Amount
Certificate of Deposit	13.000		0.00	0.00	13.00	13.00
Mobile Banking	13.000		0.00	0.00	13.00	13.00
Online Banking	6.000		0.00	0.00	6.00	6.00
Personal Loan	1.000		0.00	0.00	1.00	1.00
Savings Account	1.000		0.00	0.00	1.00	1.00

To configure the display of the selection list as a hierarchy, you must specify the desired hierarchy on the "Selection hierarchy columns" detail. Be sure to add the "Id" column last. After that, activate the box "Show as hierarchy".

Position	Selection setting	Column name	Column caption
0	Selection into detail 'Product in order' in object 'Order'	Category	Category
1	Selection into detail 'Product in order' in object 'Order'	Id	Id

Other settings

Show as hierarchy

Hierarchical selection object

Save only checked ✓

Sort by other column

Identification code

Separately, for a hierarchical object in the group of fields "Other settings" the hierarchical display is set up:

Other settings

Show as hierarchy

Hierarchical selection object

Save only checked ✓

Parent column in hierarchy

Only first level enabled

Only last level enabled

Sort by other column

Identification code

Together with the selection of the "Hierarchical selection object" setting, you can limit the selection of records to only the first or last levels of the hierarchy:

Other settings

Show as hierarchy

Hierarchical selection object

Save only checked ✓

Parent column in hierarchy

Only first level enabled

Only last level enabled

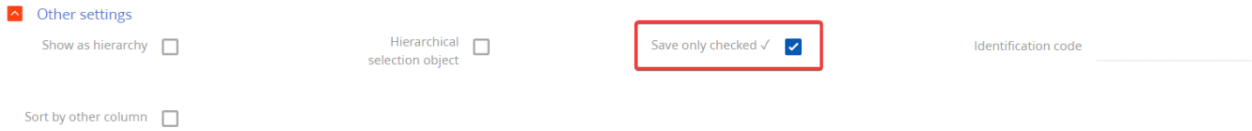
Sort by other column

Identification code

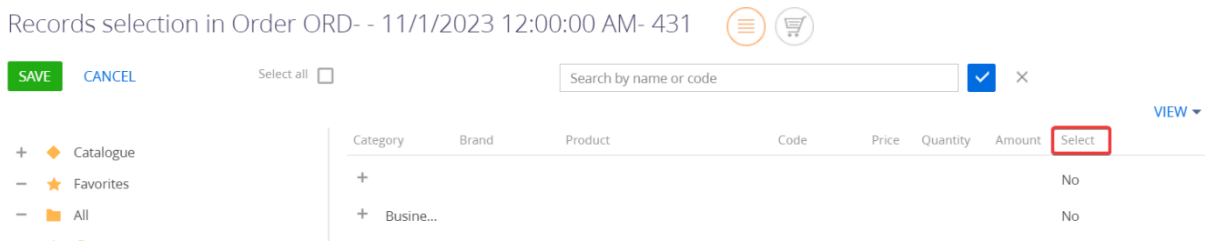
Ways to add records on a detail

Save only checked

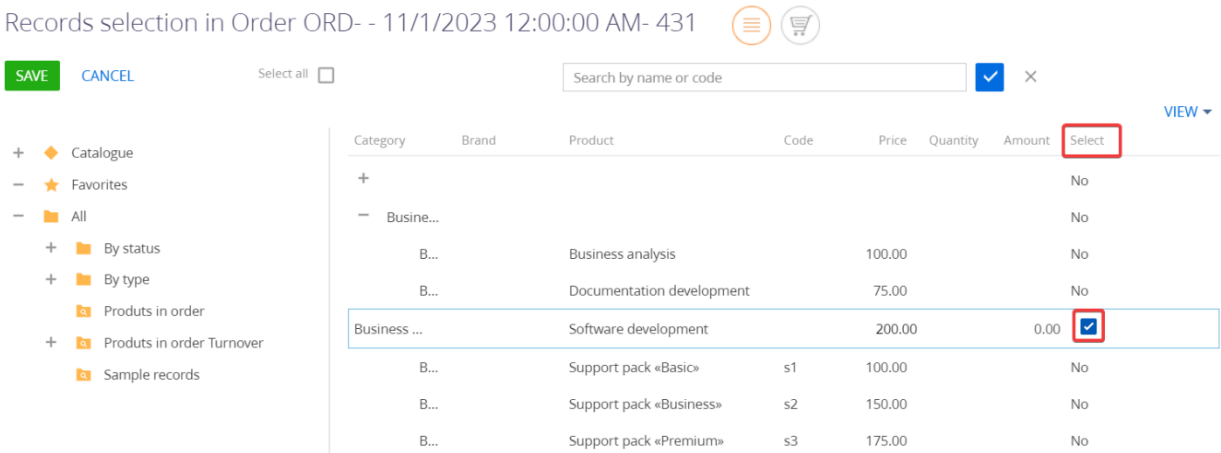
The «Save only checked ✓» function allows you to add the positions to the detail using the checkbox on the selection page.



Using this function, you can add to a part of those positions that have a check mark in the box opposite, regardless of whether the position has a quantity or not. On the selection page, the "Select" column will appear.

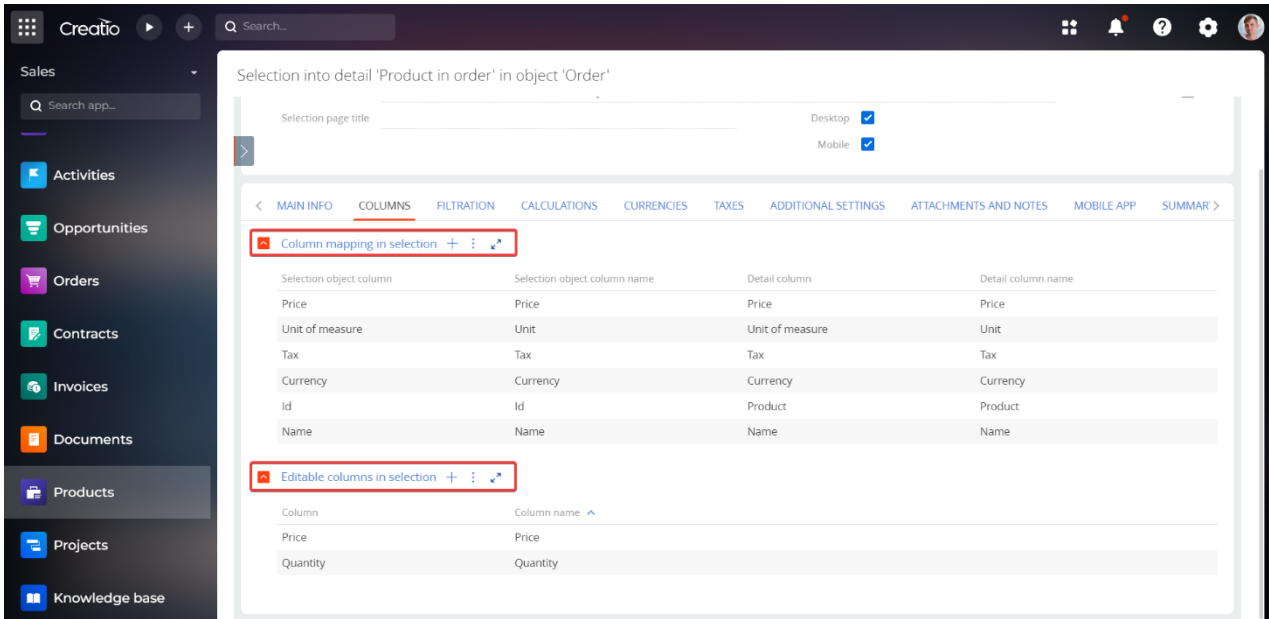


To put a check mark, you need to right-click on the position in the "Select" column. A checkbox will appear, and when moving to another position, the value "Yes" will be displayed instead of the box.



Save edited

On the COLUMNS tab, adding a position to a part is setup by editing a column



- Columns mapping in the selection – a detail in which the correspondence of the columns of the object of selection and the detail for which the selection is configured;

Column mapping in selection + : ↗

Selection object column	Selection object column name	Detail column	Detail column name
Price	Price	Price	Price
Unit of measure	Unit	Unit of measure	Unit
Tax	Tax	Tax	Tax
Currency	Currency	Currency	Currency
Id	Id	Product	Product
Name	Name	Name	Name

- Editable columns in selection – a detail showing the list of columns on which editing is available;

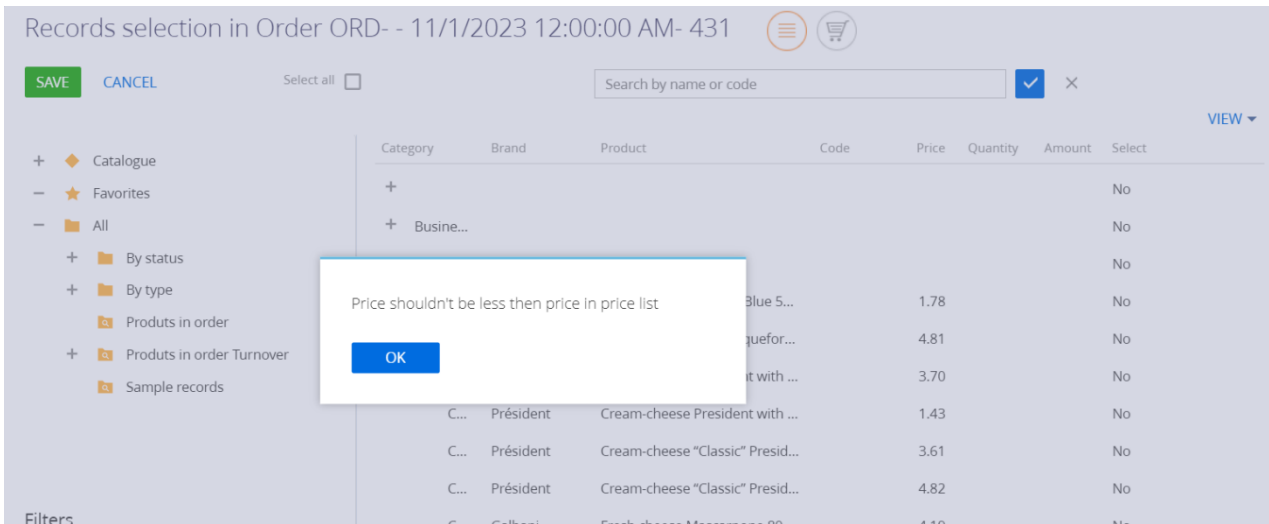
Editable columns in selection + : ↗

Column	Column name
Price	Price
Quantity	Quantity

Value validation function is available for columns of this part. For example, it is necessary that the price set by the manager is not less than the price. Then, for the Price column, set the validation for the Product Price column and fill in the “Validation error message” so that the user understands why the value is incorrect.

Column	Price	Validation column	Price
Validation comparison type	More or equal		
Validation error message	Price shouldn't be less then price in price list		
Required	<input type="checkbox"/>		

Under this condition, if an attempt is made to insert a price lower than the product price, the user will see a message and the selection will not be saved until the price is corrected.



- Columns in the selection for record saving – a detail on which a list of columns is indicated, after editing which the position is added to the detail.

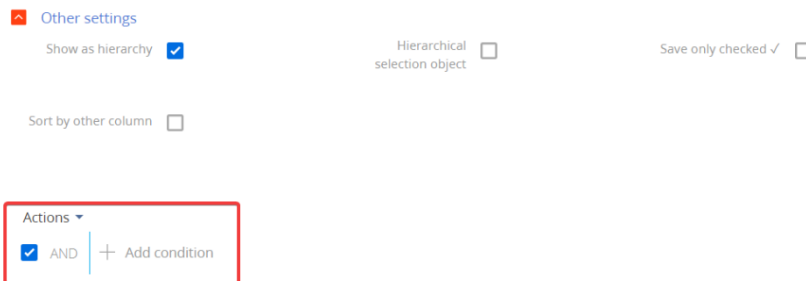
Column in selection for record saving + : ↕

Column	Column name
Quantity	Quantity

Filters

Object settings records filter

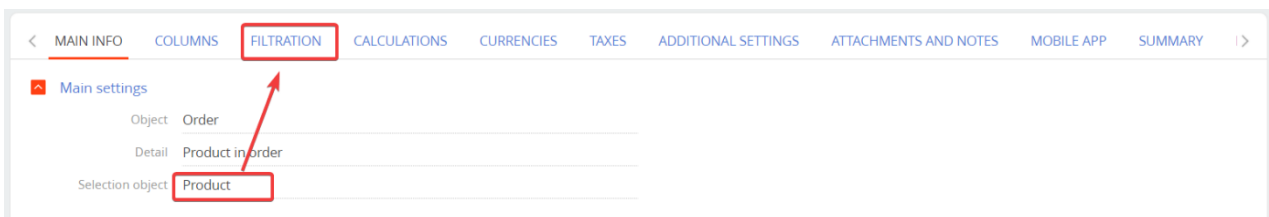
This filter selects records of the object to which the setting will be applied.



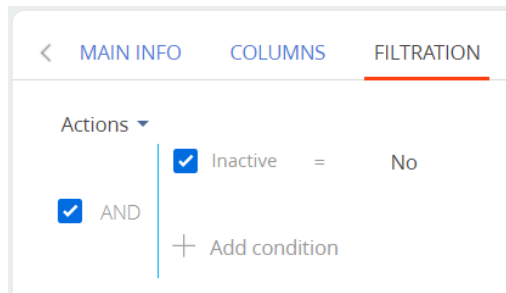
The filter setting is located on the GENERAL INFORMATION tab at the bottom of the page.

Selection object record filter

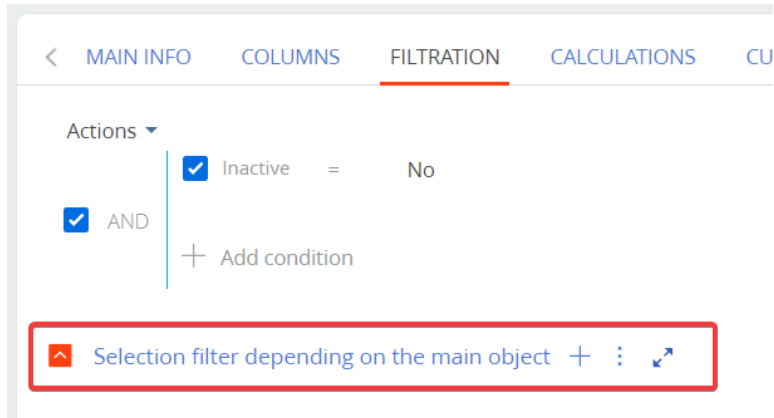
This filter is designed to filter the records of the selection object, this is the "Product". This filter is located on the FILTERATION tab



Below you can find an example of setting when the task is to filter records on the Products page, according to the attribute NOT archived.



In addition to the standard filter, the tab contains the “Select filter depending on the main object”



In the window for setting the filter condition, you need to select the comparison columns and type:

Selection into detail 'Product in order' in object 'Order' / Selection filter depending on the main object

SAVE CANCEL ACTIONS ▾

Master column path	Currency	Add Null filter if value is Null	<input type="checkbox"/>
Comparison type	Equal		
Selection column path	Currency	Or value is Null	<input type="checkbox"/>

In addition to setting the selection object filter, there is a quick search setting on the FILTERATION tab:

Quick search columns in the selection + ⋮ ↻

Column	Column name	Comparison type
Name	Name	Contains (terms)
Code	Code	Contains (terms)

The "Quick search columns in the selection" detail specifies the columns by which the user will be able to search. In the "Quick Search Field" you need to specify these search columns from the detail so that other users understand what parameters they can search by. The inscription in this field is displayed in the search field on the selection page:

Records selection in Order ORD- - 11/1/2023 12:00:00 AM- 431

SAVE CANCEL

Select all

Search by name or code ×

VIEW ▾

	Category	Brand	Product	Code	Price	Quantity	Amount	Select
+ ◆	Catalogue							No
- ★	Favorites							No
- 📁	All							No
+ 📁	By status							No
+ 📁	By type							No
📁	Produits in order							No
								No
								No
								No
								No
								No

Additional selection object filtering by fields

In the lower left corner of the selection page, under the catalog, there is a filtering module, which displays all the columns of the selected object, for example, the Product.

All fields are lookup fields, with the possibility of multi-selection and the comparison type Equal

Records selection in Order ORD- - 11/1/2023 12:00:00 AM- 431  

+  Catalogue

-  Favorites

+  All

— Cheese VIEW ▾

...	Président	Blue-veined cheese Le Blue 5...	1.78	No
...	Société	Blue-veined cheese Roquefor...	4.81	No
...	Président	Cream-cheese President with ...	3.70	No
...	Président	Cream-cheese President with ...	1.43	No
...	Président	Cream-cheese "Classic" Presid...	3.61	No
...	Président	Cream-cheese "Classic" Presid...	4.82	No
...	Galbani	Fresh cheese Mascarpone 80...	4.19	No
...	Galbani	Fresh cheese Mozzarella 45% ...	3.52	No
...	Galbani	Fresh cheese Ricotta 44% Gal...	1.39	No
...	Président	Goat's cheese 45% Président	1.52	No
...	Président	Hard cheese Edam slice 40% ...	3.24	No
...	Président	Hard cheese Emmental 45% P...	4.99	No
...	Président	Hard cheese Gauda slice 48% ...	3.42	No
...	Galbani	Hard cheese Gran Gusto grat...	1.31	No
...	Galbani	Hard cheese Grana Padano 3...	2.96	No
...	Président	Hard cheese Maasdam slice 4...	2.46	No

Filters

Created by 

Modified by 

Unit of measure 

Currency 

Tax 

Type 

Owner 

Calculations

On the CALCULATIONS tab, the detail "Calculated columns in the selection" has been added. This setting allows you to apply formulas on the selection page.

Selection into detail 'Product in order' in object 'Order'

CLOSE ACTIONS ▾ UPDATE MOBILE APP VIEW ▾

Name * Selection into detail 'Product in order' in object 'Order' Disabled

Selection page title Desktop

Mobile

<
MAIN INFO
COLUMNS
FILTRATION
CALCULATIONS
CURRENCIES
TAXES
ADDITIONAL SETTINGS
ATTACHMENTS AND NOTES
MOBILE APP
SUMMARY
FI >

✖ Selection calculated columns + ⋮ ↕

Column	Column name	Formula
Amount	Amount	price * quantity
Total	TotalAmount	amount - (amount / 100 * discount)

- Column – indicates the name of the column in which the result will be displayed;

- Formula – the formula by which the result in the column will be calculated. After filling in the formula, the variables will appear on the “Calculation column variables in selection” detail. For calculation, the numerical columns of the part object are selected in the formula.

Selection into detail 'Product in order' in object 'Order' / Selection calculated column

CLOSE ACTIONS ▾

Column Amount

Formula price * quantity

< VARIABLES

Calculation column variables in selection ⋮ ↕

Name	Column	Column name
quantity	Quantity	Quantity
price	Price	Price

On the selection page, when changing the columns involved in the variable, the system recalculates the value of the calculated column.

Currencies

On the CURRENCIES tab, you can set up multi-currency calculations for product prices

< MAIN INFO COLUMNS FILTRATION CALCULATIONS **CURRENCIES** TAXES ADDITIONAL SETTINGS ATTACHMENTS AND NOTES MOBILE APP SUMMARY FI >

☰ Currencies settings

Main object currency column Currency Main object currency rate column Exchange rate

☰ Currency columns in the selection + ⋮ ↕

Column	Column name	Currency column	Currency column name	Currency rate column	Currency rate column name
Price	Price	Currency	Currency	Exchange rate	CurrencyRate

- Main object currency column – select the column where the main object currency is located;
- Main object currency rate column – select the column containing the exchange rate of the main object;
- Currency columns in the selection - columns in the selection, which should be recalculated at the exchange rate. The following page opens in order to set up column settings:

Selection into detail 'Product in order' in object 'Order' / Currency columns in the selection

CLOSE ACTIONS ▾

Detail object	Product in order
Column title	Price
Currency column title	Currency
Currency rate column title	Exchange rate

Here you need to choose:

- Column title – select the column that should be recalculated according to the exchange rate;
- Currency column title – select the selection currency column;
- Currency rate title – select the column of the selection currency rate.

Thanks to this setting, if the currency of the contract changes, the price of the product for the parts will be automatically recalculated.

Additional settings

The ADDITIONAL SETTINGS tab contains:

Use "Add all"	<input checked="" type="checkbox"/>	Default "Add all"	<input type="checkbox"/>
Use "Replication"	<input type="checkbox"/>	Default "Replication"	<input type="checkbox"/>

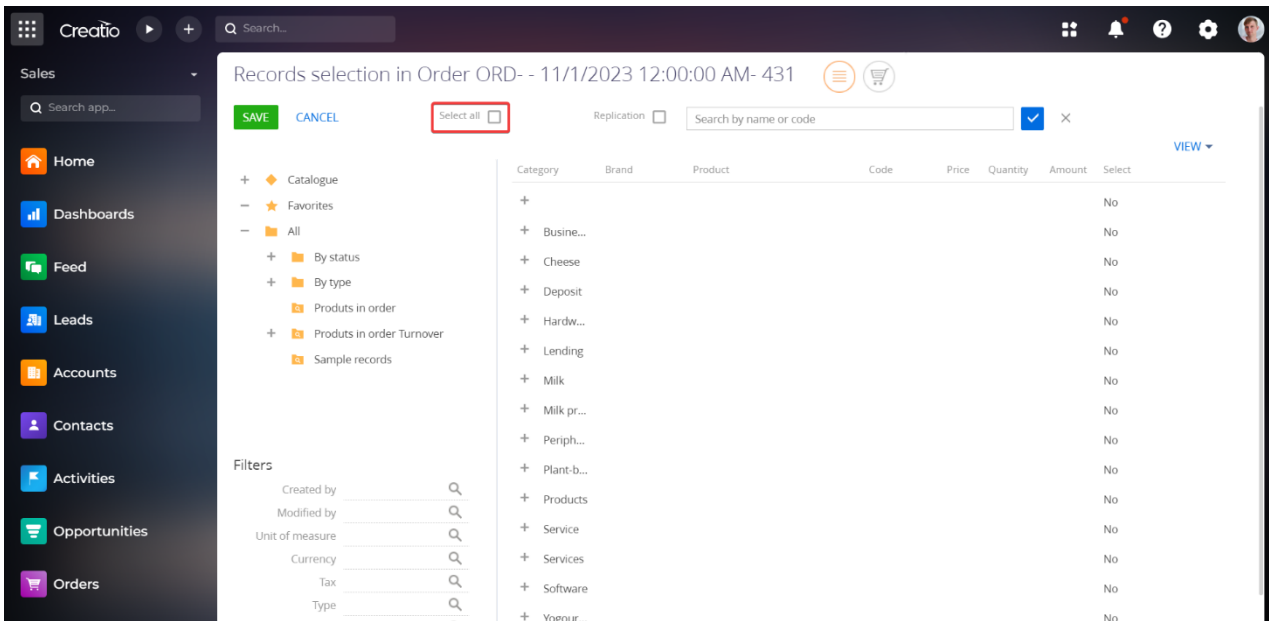
CalcEngine
Disable CalcEngine on add by filter

Folders settings
Catalogue column Id

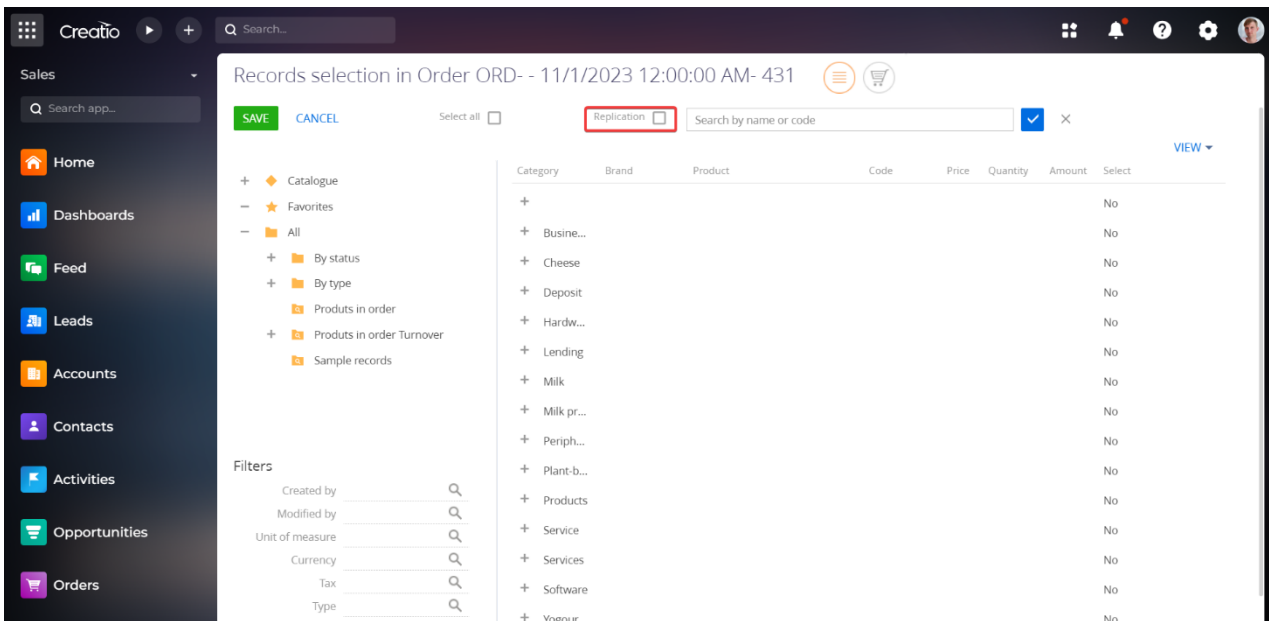
Catalogue column (Name)	Id
Catalogue column object	Product

- Use "Add all" – it displays the "Select all" function on the selection page, which allows you to add all records that match the current filter

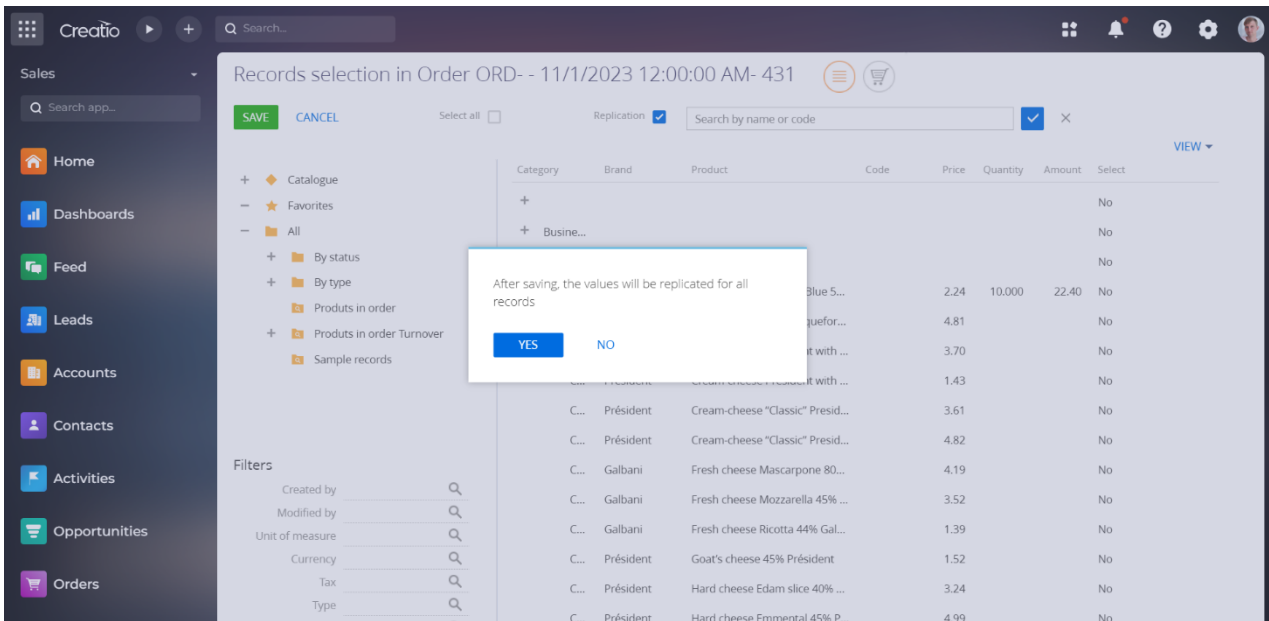
Default "Add All" - will keep this setting active by default.



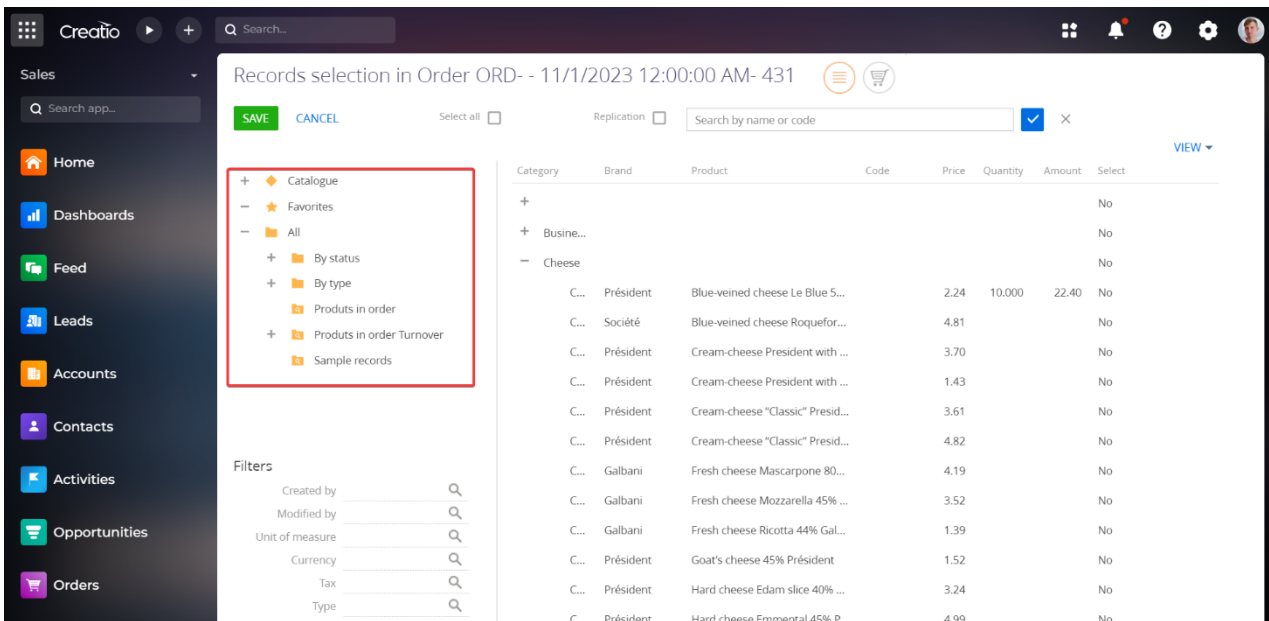
- Use “Replication” – displays the “Replication” function on the selection page, which allows you to copy the largest value to all selection records.



Enter a value in any record in the Quantity column and activate Duplication. The system will display a confirmation request and the value will be copied to the rest of the records.

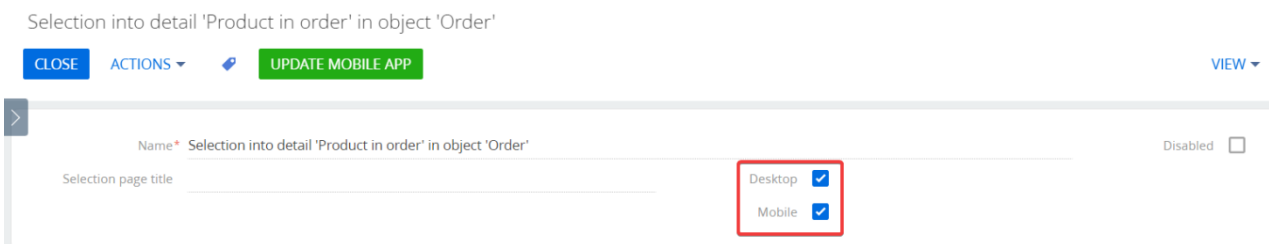


Group settings – allows you to group catalog folders by indicator.



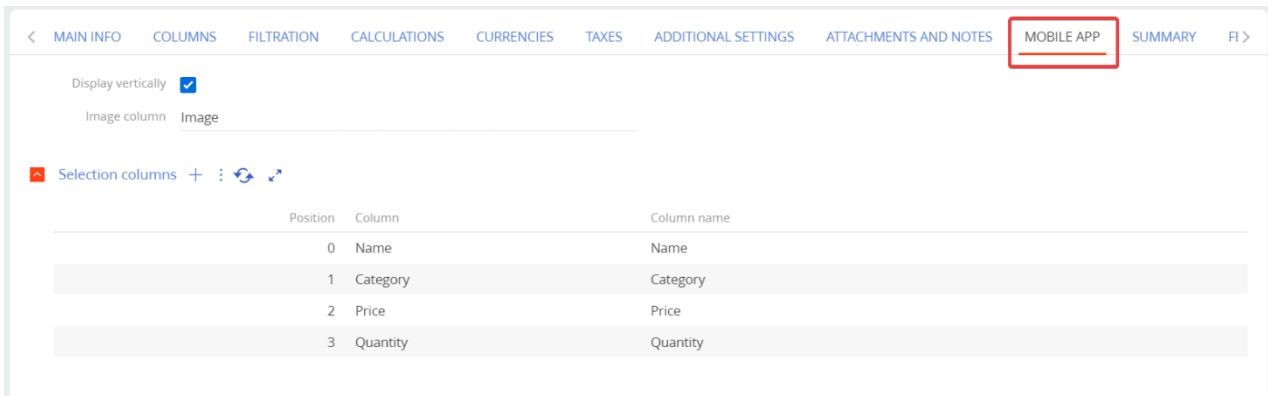
Mobile app

In the selection edit menu, you can choose which type of devices it will be used on.



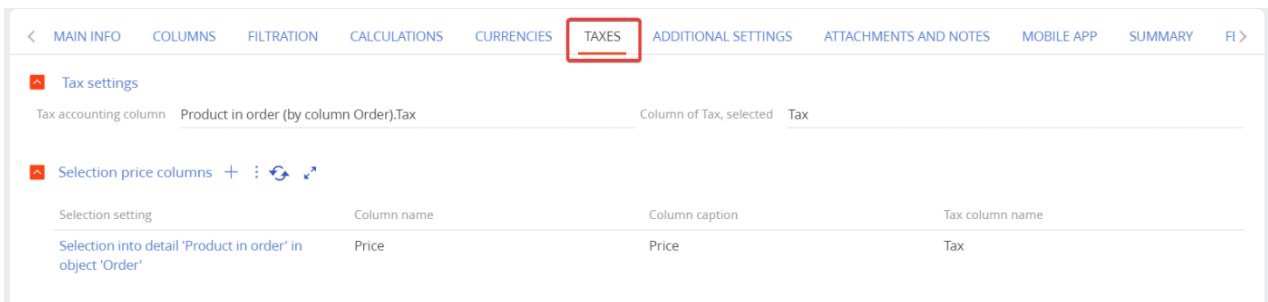
All functionality is available in the mobile application.

The columns displayed in the mobile application can be configured in the Mobile app tab.



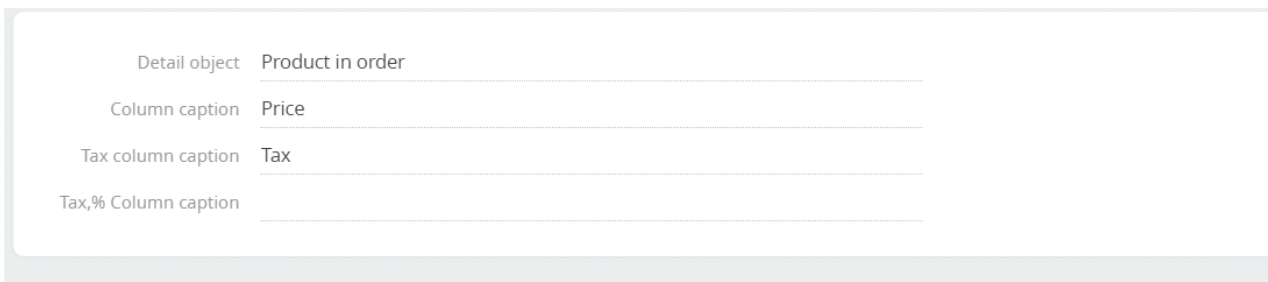
Taxes

On the TAXES tab, you can set up product price calculations that include tax.



- Tax accounting column – selection of the column in which the tax is taken into account
- Column of Tax, selected – selection of the column from which the tax type will be taken.

Detail of the price column in the selection



- Detail object - column for selecting an object.
- Column caption – the column in which the final price will be written.
- Tax column caption – the column from which the tax type will be extracted.
- Tax, % column caption – a column that will show the % of the selected tax.

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