SALES'UP CATALOG SELECTION ENHANCEMENTS FOR CREATIO
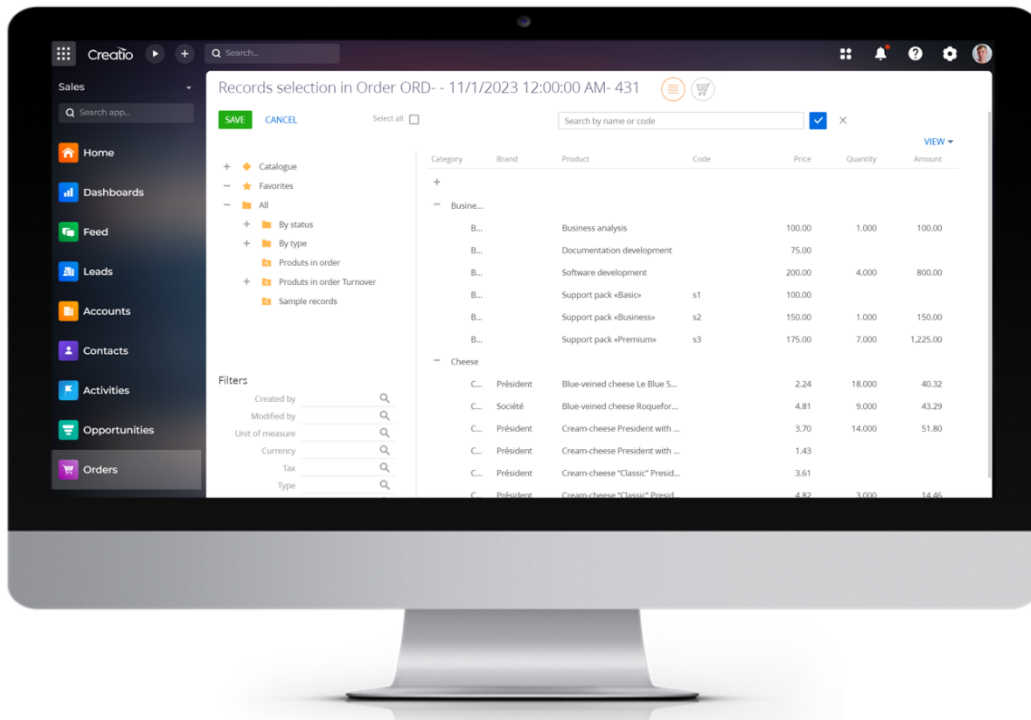

Guide to setup and utilization

16.11.2023

CONTENTS:

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;

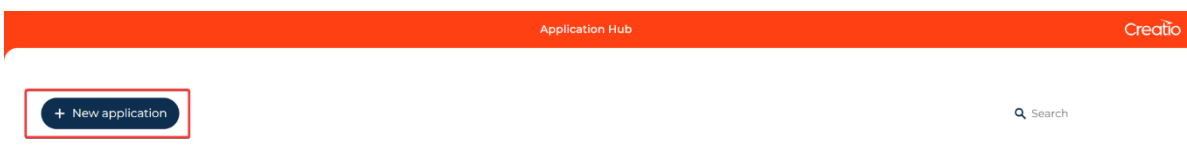- Set up automatic recalculation of the product price, depending on the contract currency;

Product installation

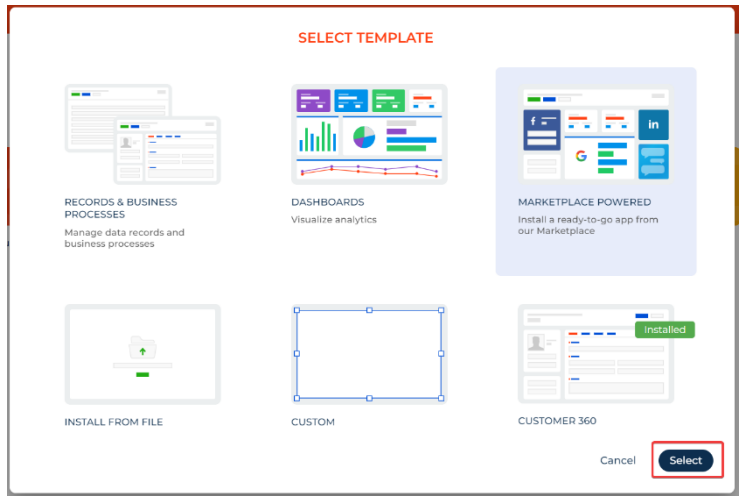To install packages, click the [gear icon] button and go to the "Application Hub".
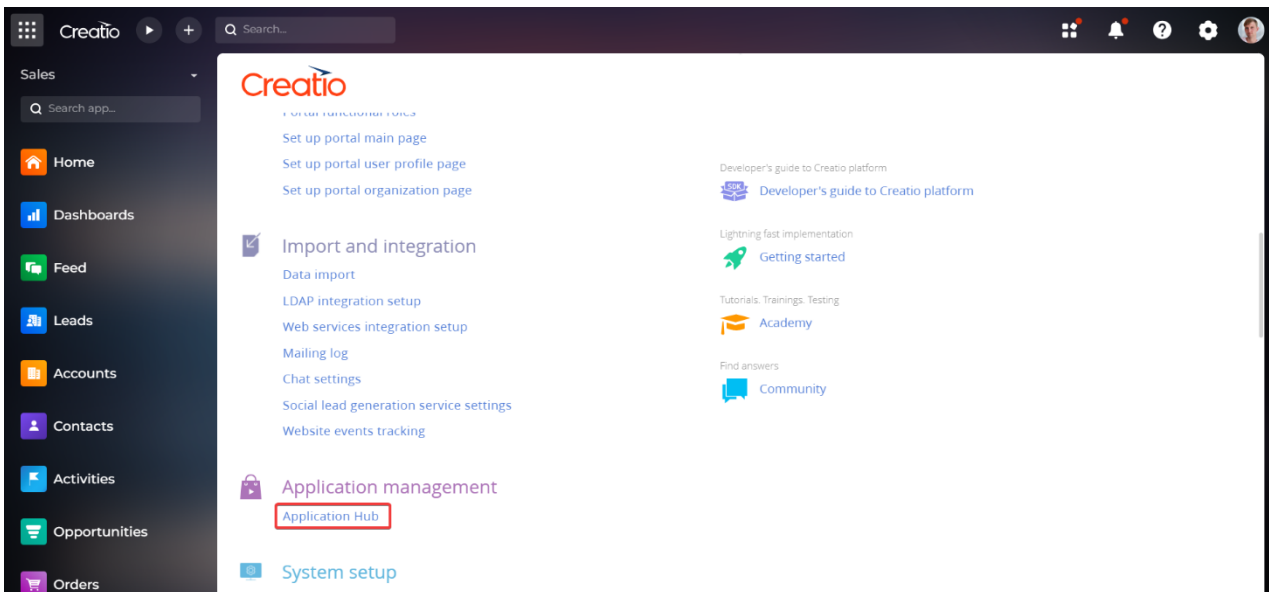
Next, go to the "Application Hub" section.

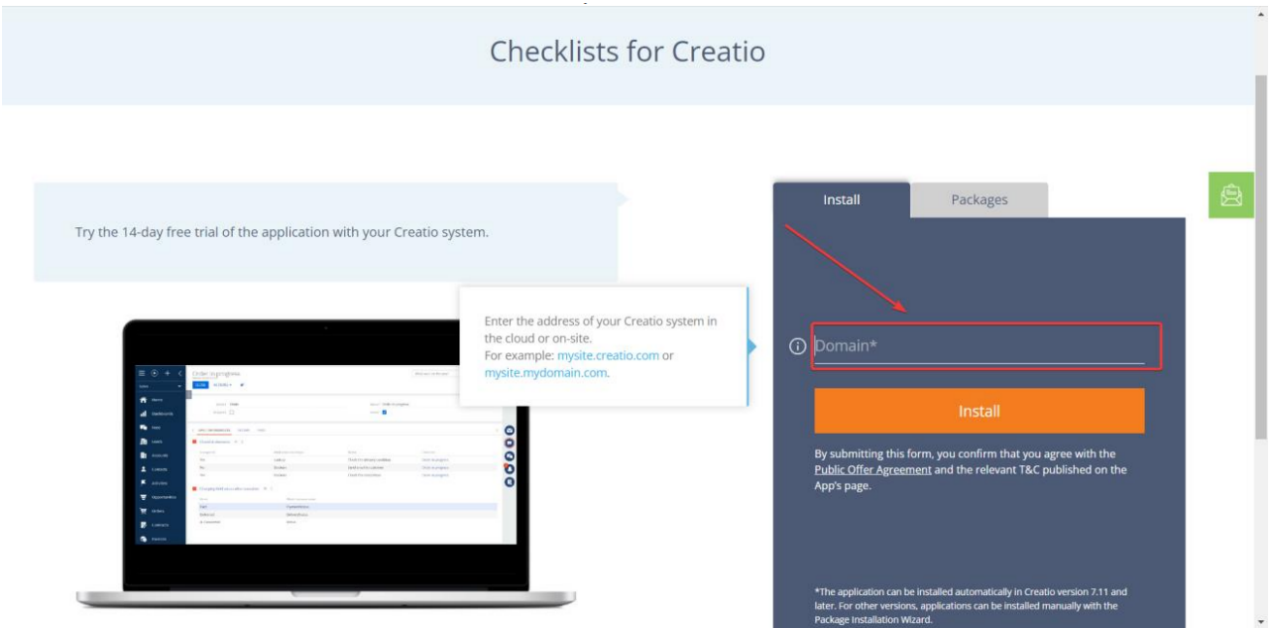On the "Application Hub" page, click "New application",

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.
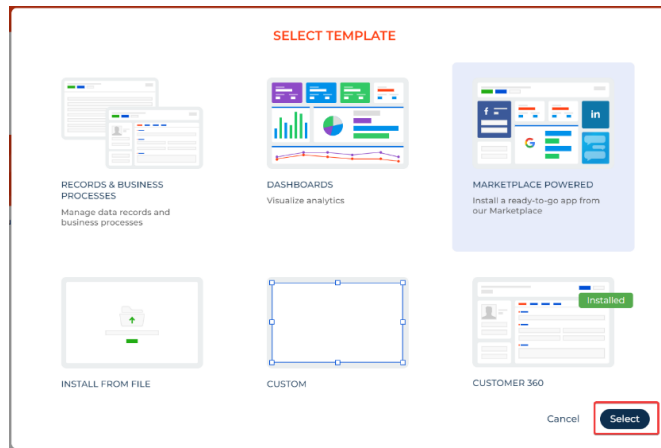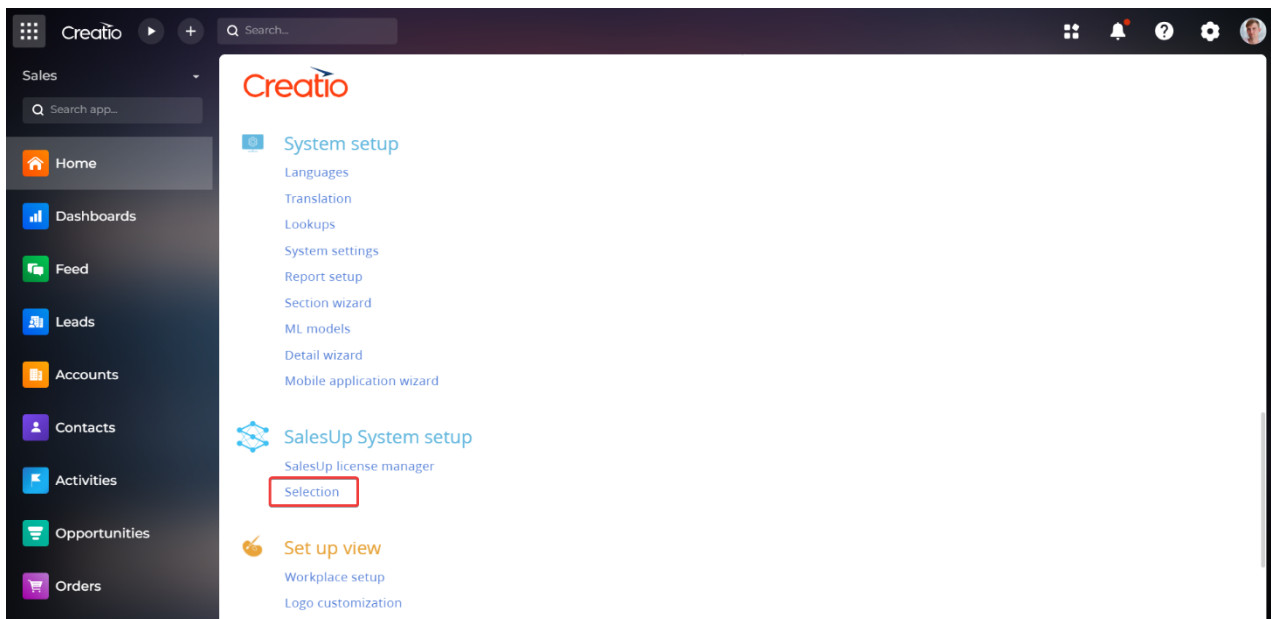
Selection setup
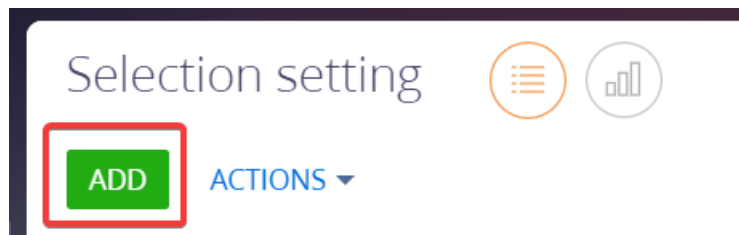
Creation of a new selection setup

After installing the product, go to System designer to create a new selection setup
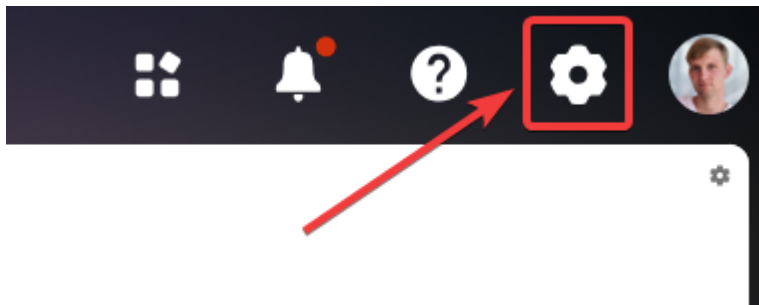
Next, in the "Sales'Up System setup" block, select "Selection":

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;

- 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;

- 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.

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".

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

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:
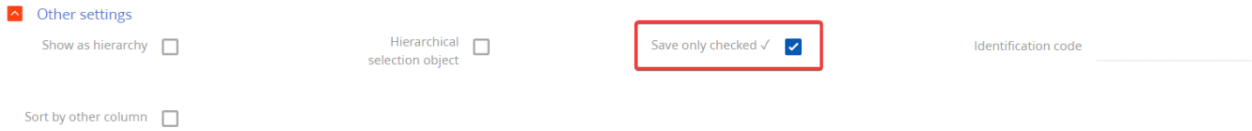
Ways to add records on a detail

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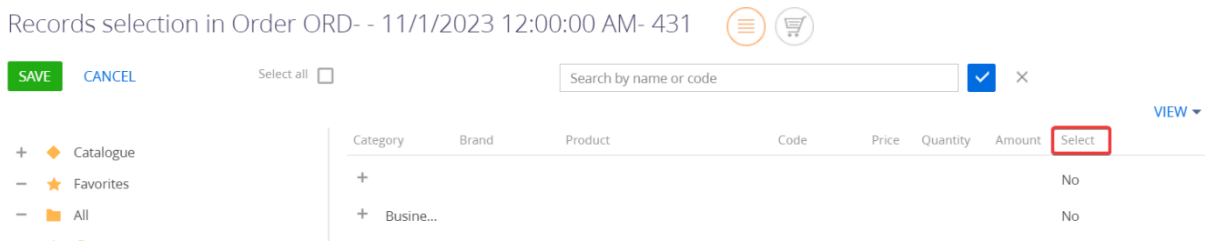
To put a check mark, you need to right-click on the position in the "Select" column. A checkbox will appear, and when moving to another position, the value "Yes" will be displayed instead of the box.
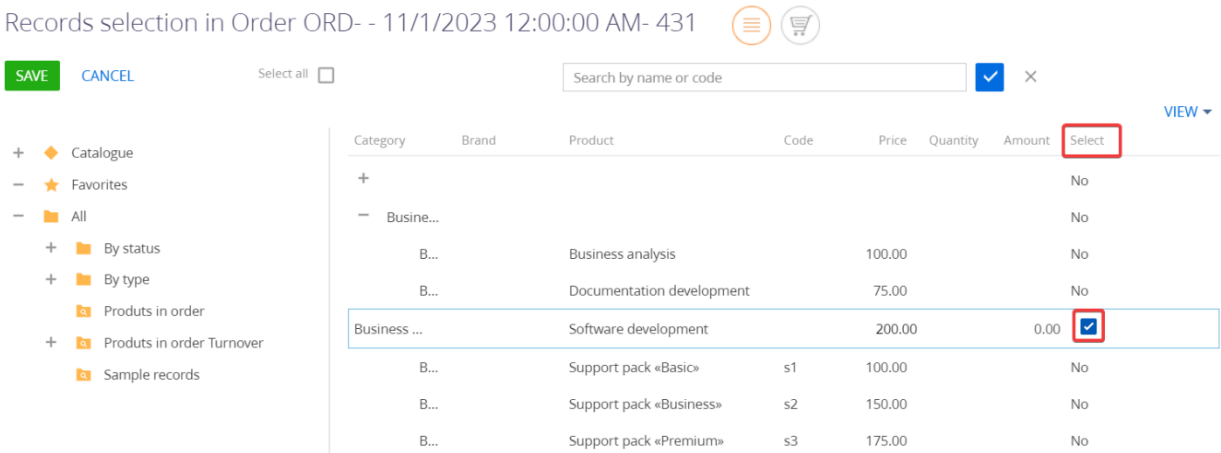
Save edited

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;
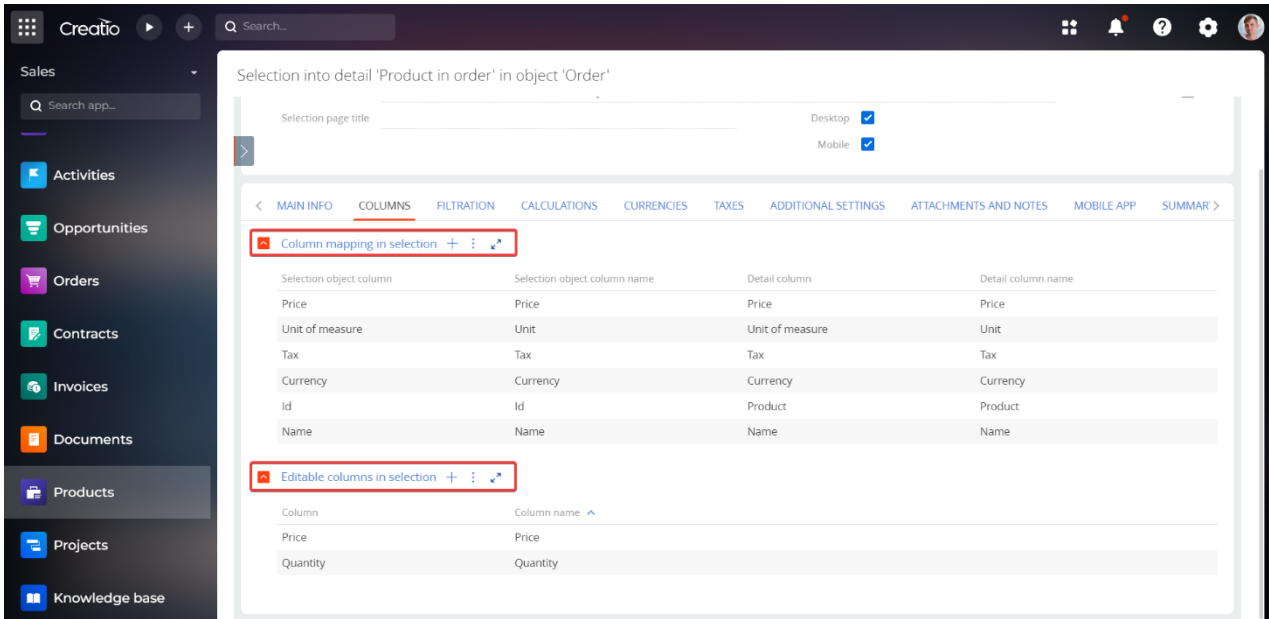

Selection object column	Selection object column name	Detail column	Detail column name
Price	Price	Price	Price
Unit of measure	Unit	Unit of measure	Unit
Tax	Tax	Tax	Tax
Currency	Currency	Currency	Currency
Id	Id	Product	Product
Name	Name	Name	Name

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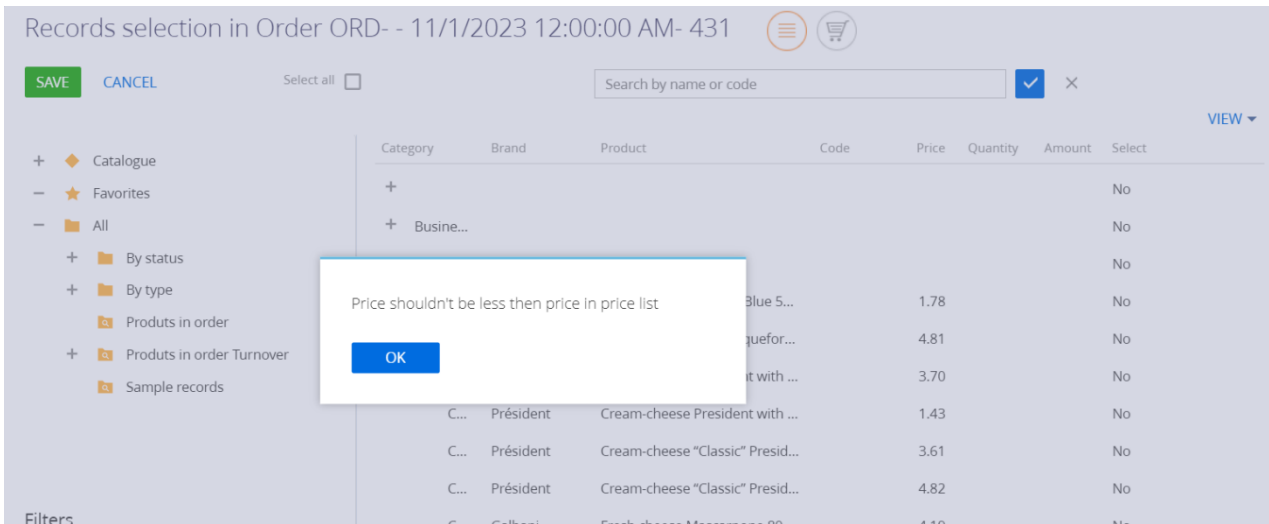

Column	Column name ⌃
Price	Price
Quantity	Quantity

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.

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.
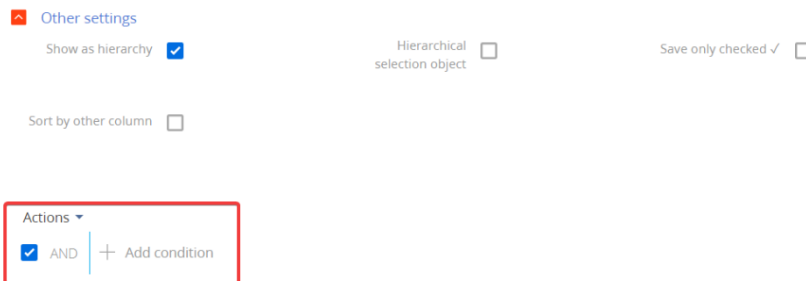

Column	Column name
Quantity	Quantity

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
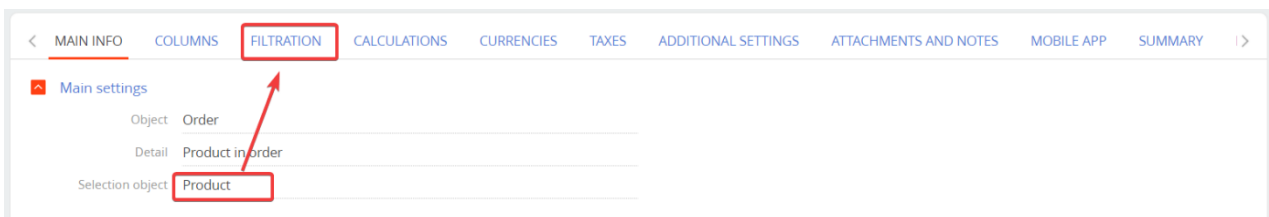
Below you can find an example of setting when the task is to filter records on the Products page, according to the attribute NOT archived.
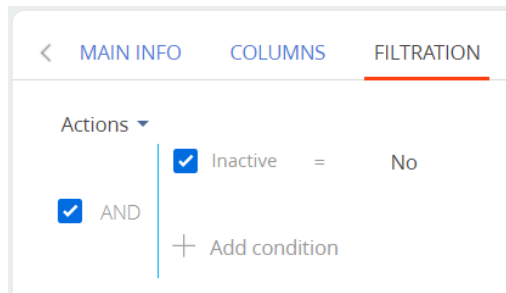
In addition to the standard filter, the tab contains the "Select filter depending on the main object"
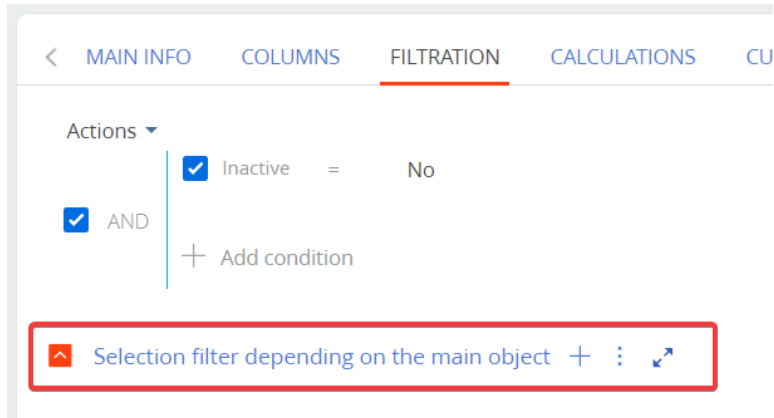
In the window for setting the filter condition, you need to select the comparison columns and type:

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

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:

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

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.

- 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" – 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.
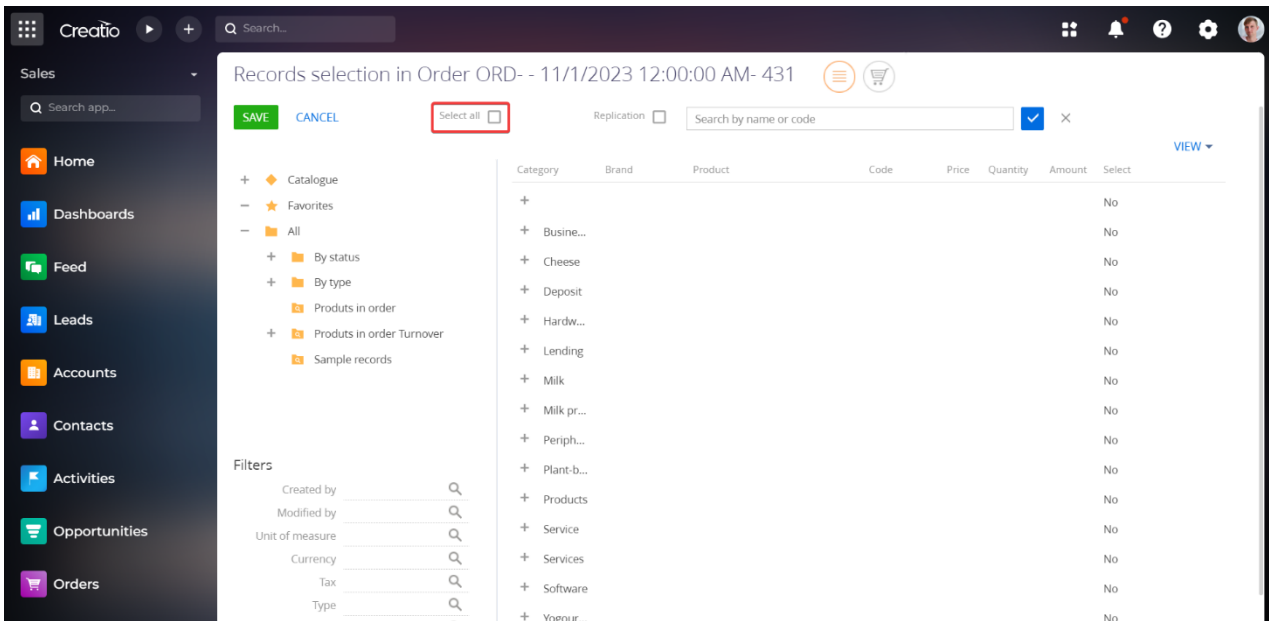
- Use "Replication" – displays the "Replication" function on the selection page, which allows you to copy the largest value to all selection records.
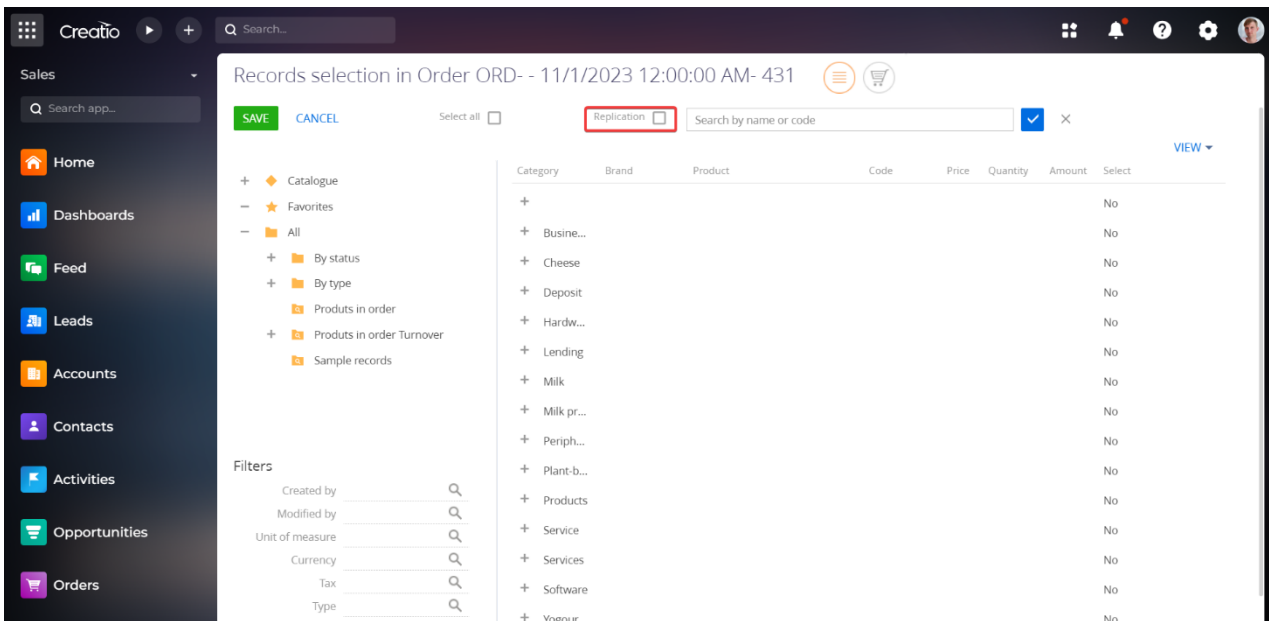
Enter a value in any record in the Quantity column and activate Duplication. The system will display a confirmation request and the value will be copied to the rest of the records.
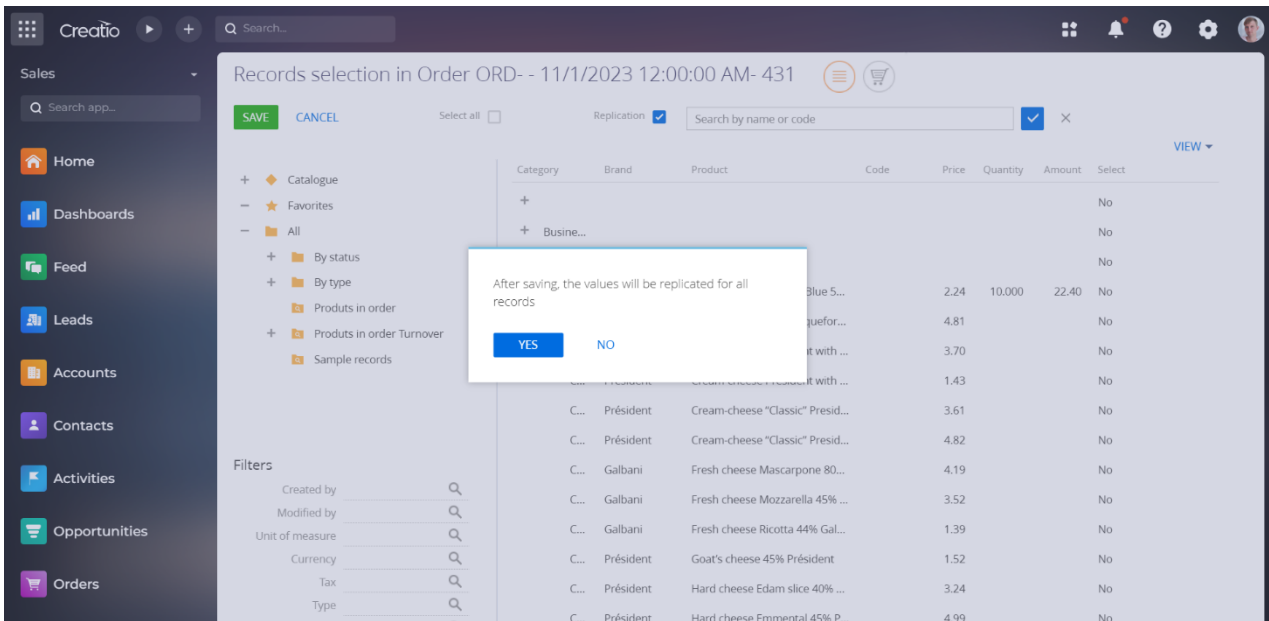
Group settings – allows you to group catalog folders by indicator.
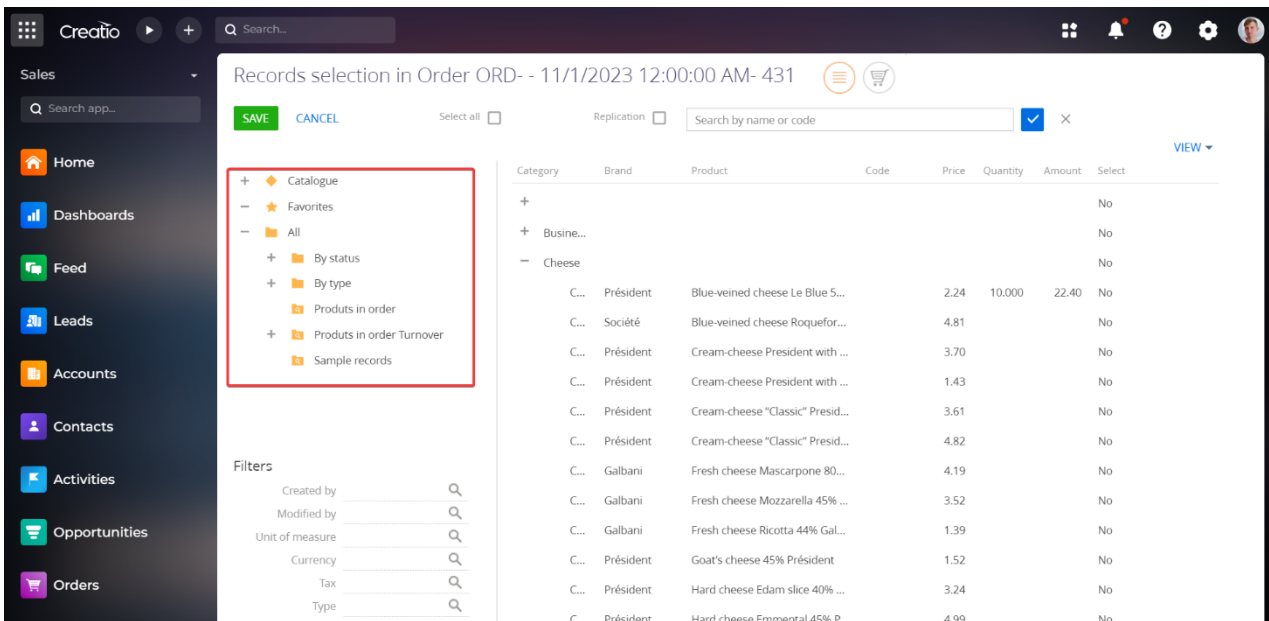
Mobile app

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.

Display vertically ☑

Image column   Image

⌃ Selection columns + ⋮ ↻ ↗

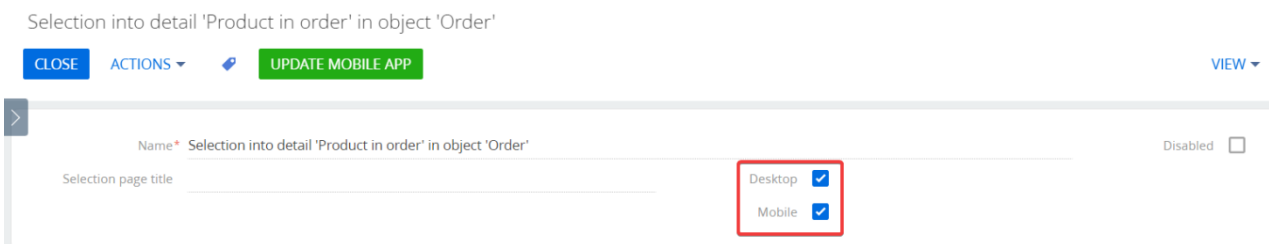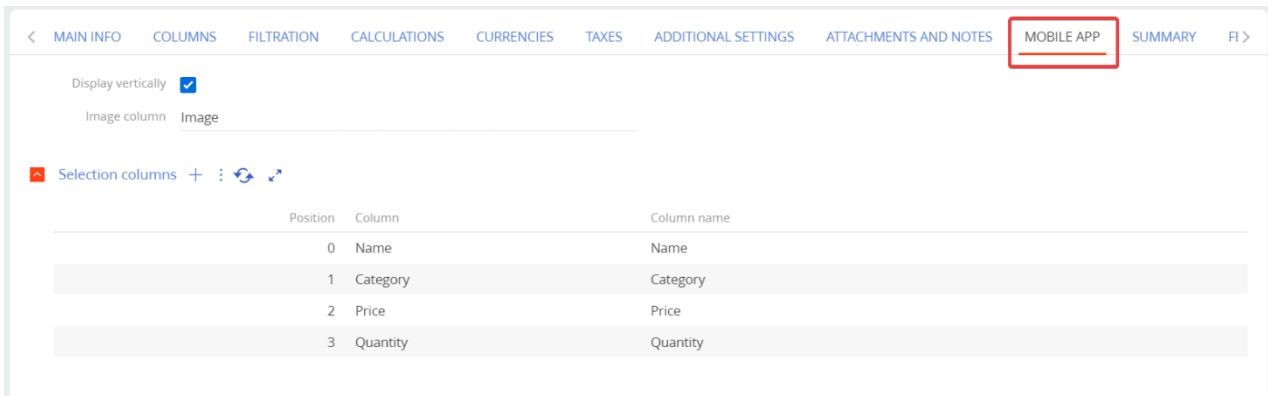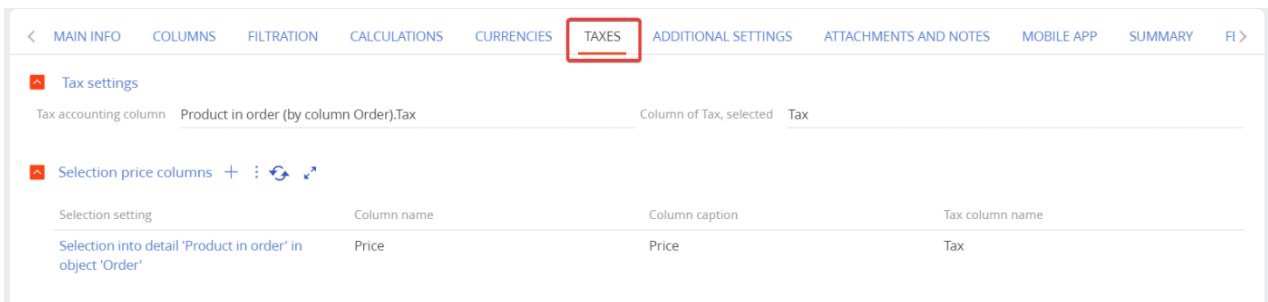| Position	Column	Column name
0	Name	Name
1	Category	Category
2	Price	Price
3	Quantity	Quantity

Taxes

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

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

⌃ Tax settings

Tax accounting column   Product in order (by column Order).Tax   Column of Tax, selected   Tax

⌃ Selection price columns + ⋮ ↻ ↗

Selection setting	Column name	Column caption	Tax column name
Selection into detail 'Product in order' in object 'Order'	Price	Price	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   Product in order

Column caption   Price

Tax column caption   Tax
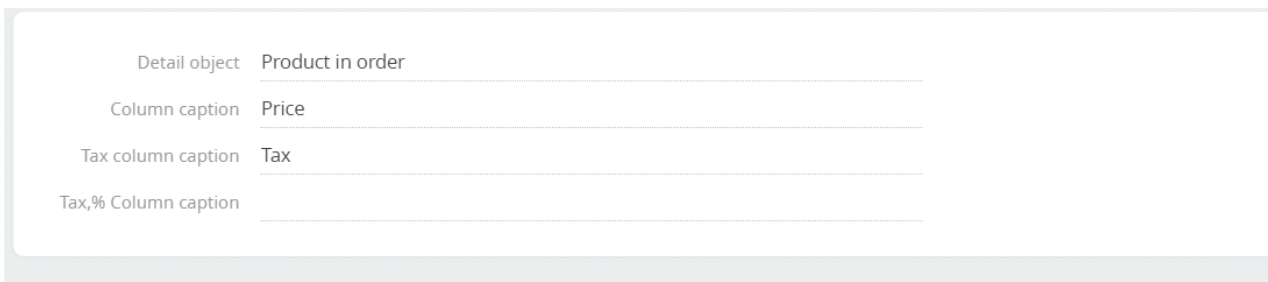
Tax,% Column caption

- 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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