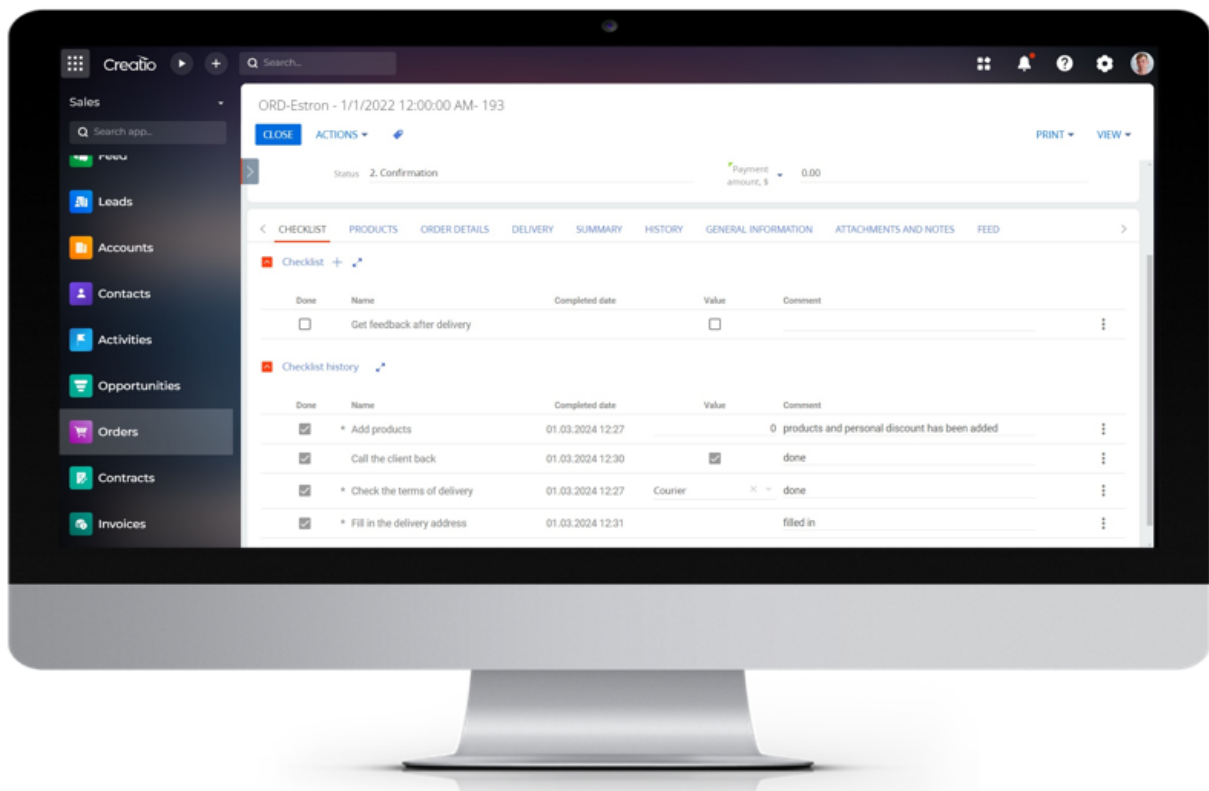




SALES'UP CHECKLISTS FOR CREATIO



Guide to setup and utilization

01.03.2024

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Product description

Sales'Up Checklists for Creatio helps to systematize routine operations within the framework of the ongoing workflows.

The user can define the sequence, mandatory, and follow-up tasks at each step of any workflow facility in the 'Checklist settings' wizard. The product optimizes employee task storage by clearing the schedule from repetitive activities.

Use cases

The app is helpful for companies to make a list of documentation from the customer at any stage:

- Sale conducting
- Ordering
- Marketing activities
- Case processing

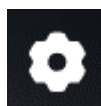
Checklists allow maintaining a list of tasks without being bound to a chronology: to send products that we need to agree with the carrier, prepare documents, notify production, etc.

Key features

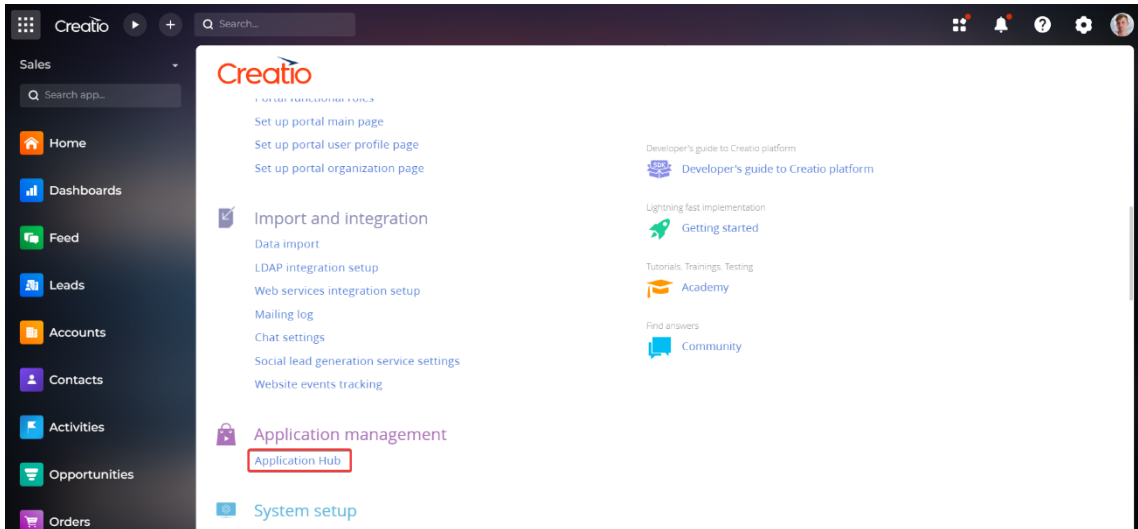
- Setting up checklists for any object;
- Setting up the mandatory for each one from the item list;
- Storing files related to each item;
- Keeping track of each item's due date;
- Storing checklist history;
- Changing the status of an object upon a checklist completion.

Installation and setup of the product

Product installation

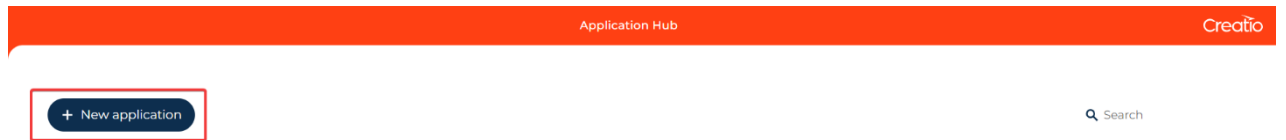


To install packages, click the  button and go to the "Application Management" .

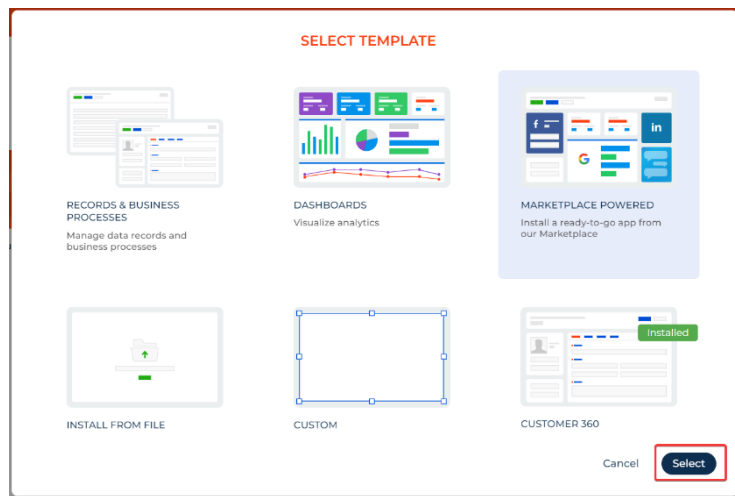


Next, go to the "Application Hub" section.

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



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

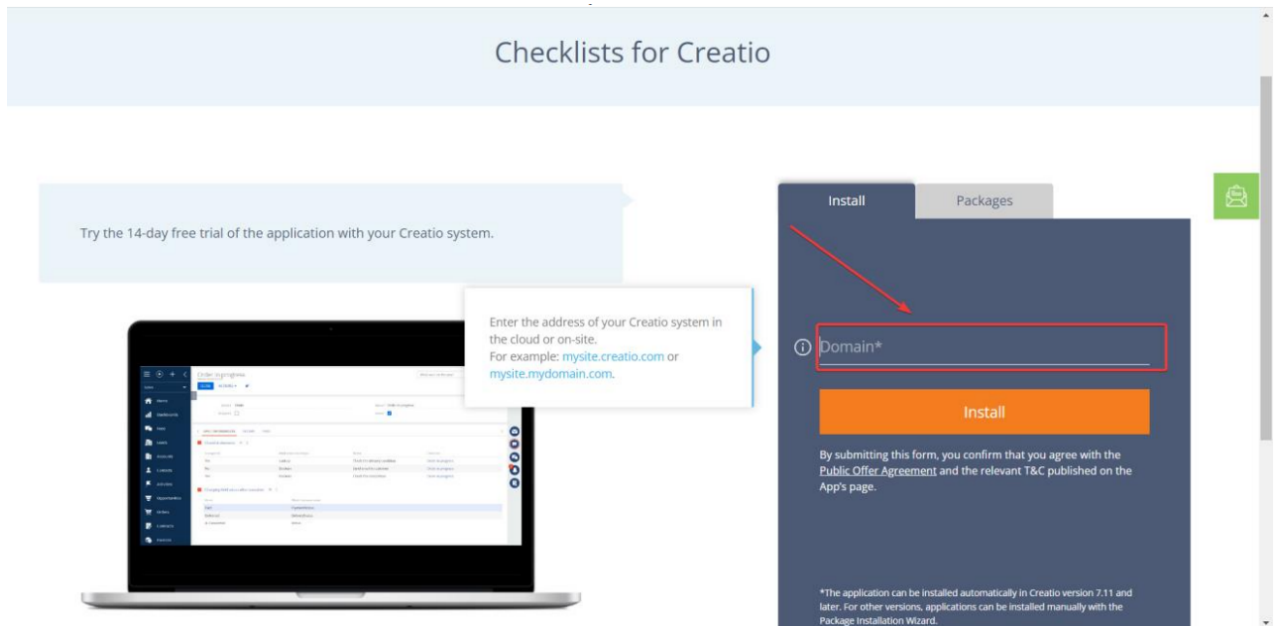


Click the "Install" button on the product page.



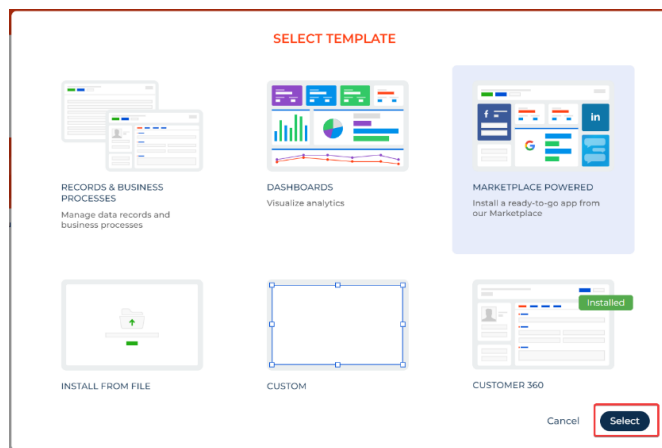
Enter the address of the Creatio website where you want to install the product.

Checklists for Creatio



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 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.



General settings

For editing previously created settings, click on the link of the name "Checklist" or go to the section for the required record (the record will be highlighted in a different color), click "OPEN".

After creating a new one or when proceeding to edit a previously created record, the following fields are available for making settings:

Section – select the name of the section where the checklist will be applied. After the first saving, the "CHECK-LIST" tab will be added to all records in the section

Required – If the option is selected, the checklist will be mandatory.

Name – fill in the name by which system users will identify the current checklist. It is recommended to enter a unique name.

Active – activation/deactivation of the setting. If the box is checked, the checklist is activated.

Adding elements of the checklist

Name	Is required	Additional result type	Lookup value
Add products	Yes	Integer	
Call the client back	No	Boolean	
Check the terms of delivery	Yes	Lookup	Delivery type
Fill in the delivery address	Yes		

Object column name	Object field	Object column type	Number value
Status	Status	10	0.00

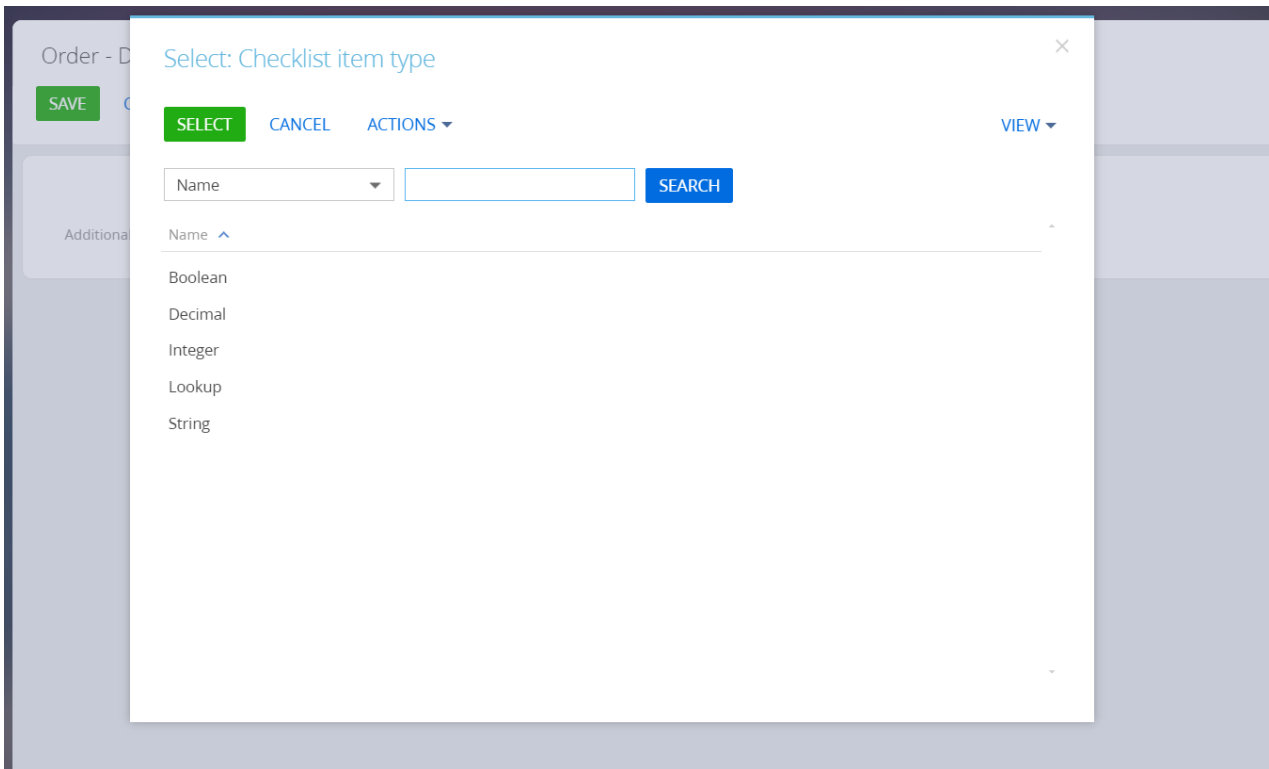
To add and edit a checklist element, go to the “BASIC INFORMATION” tab, to the “Elements of the Checklist” detail and click + to create a new record or select a detail record to edit from the list.

On the element settings page, fill in:

Name – enter a description of the step, object action, or user action with data from the object

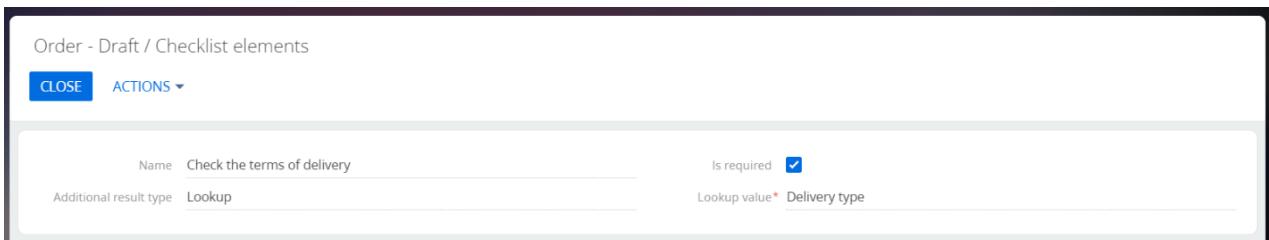
Additional result type – select from the list the type (format) of the additional field for this checklist step. The following types are available:

- *Lookup*
- *Fractional – a field for entering numbers with a fractional part*
- *Boolean – boolean field (checkbox)*
- *String – a field for entering text*
- *Integer – a field for entering integer numbers*



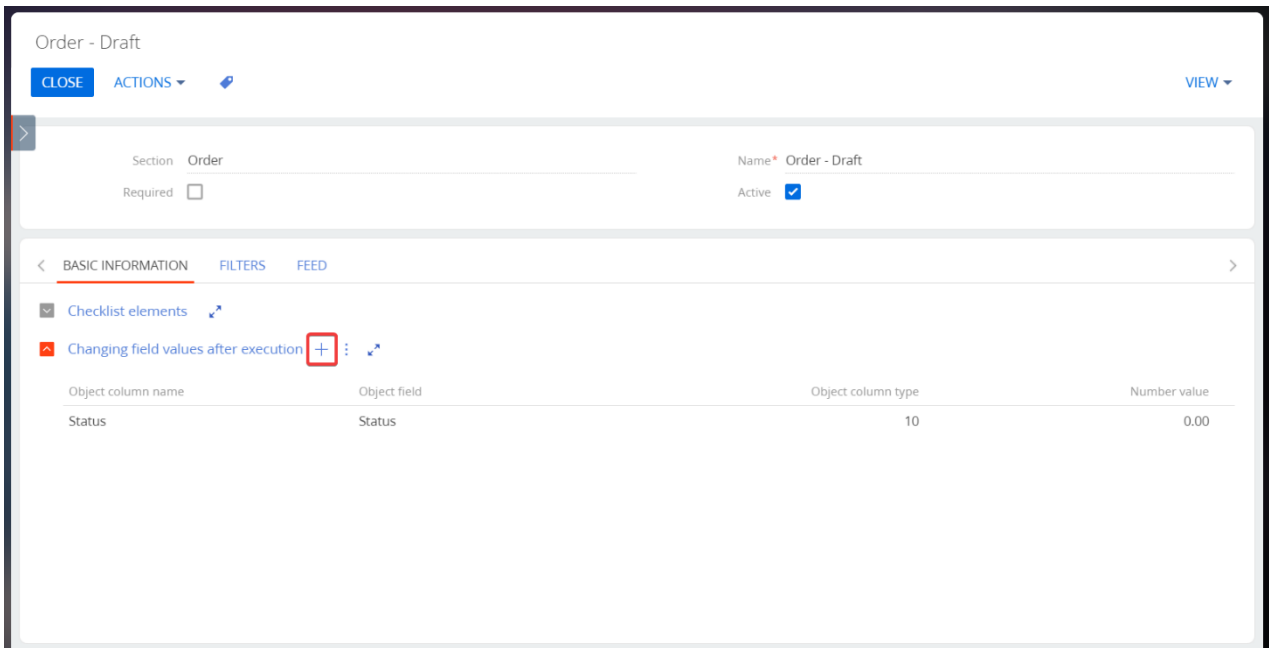
- Is required - select the option if you want to make the step mandatory before proceeding to the next step.

Lookup value – select from the list the object in which the values are filled. Values from the lookup will be available to the user for selection when performing this step in the checklist. Only available for element type "Lookup". It is required.



Configuration of the object field values after checklist completion

The functionality provides for changing the value of the selected field after completing all the required steps of the checklist.

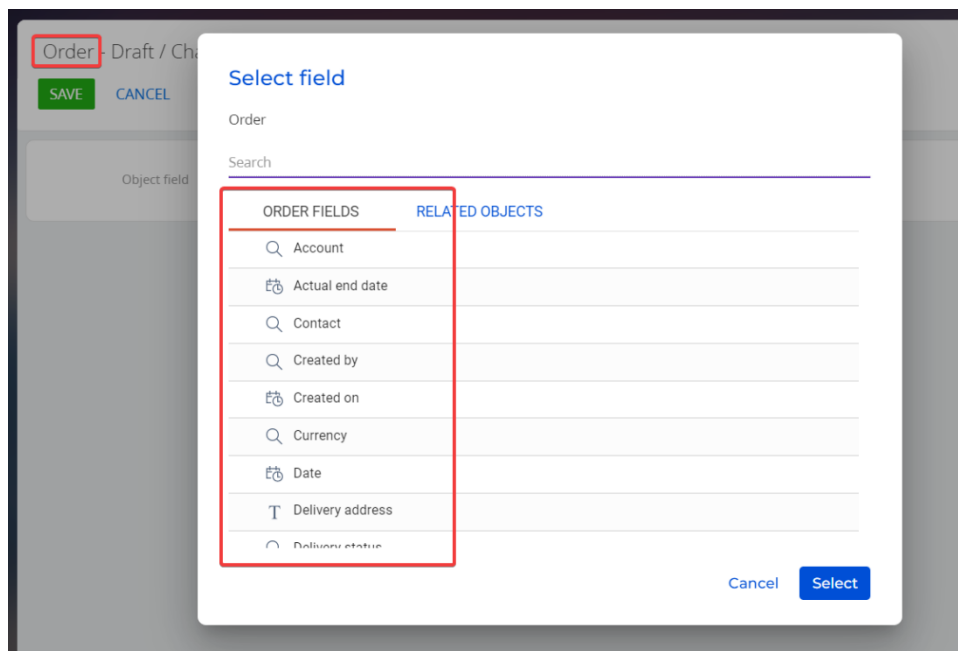


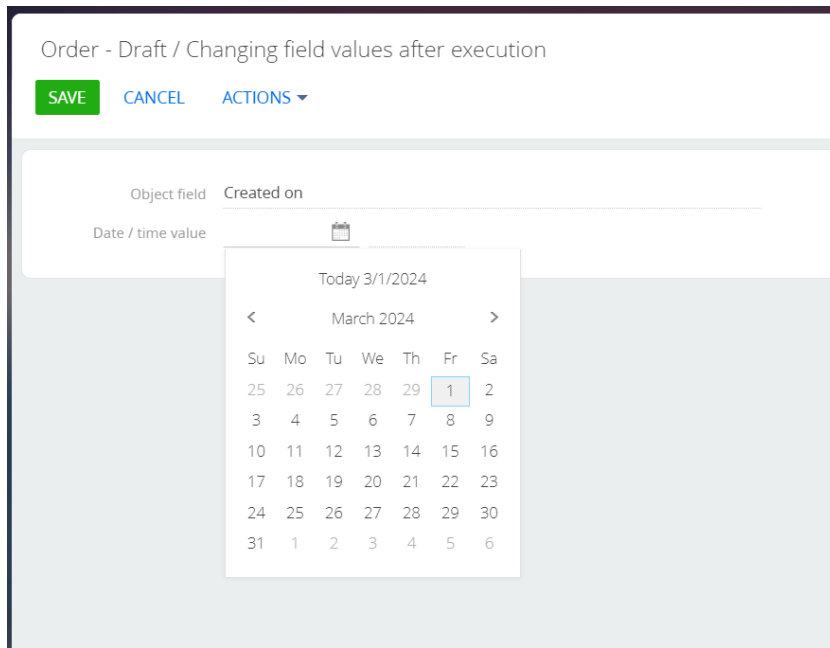
To configure the values, go to the "BASIC INFORMATION" tab, to the "Changing field values after execution" detail, and click + to create a new record.

Make settings on the page:

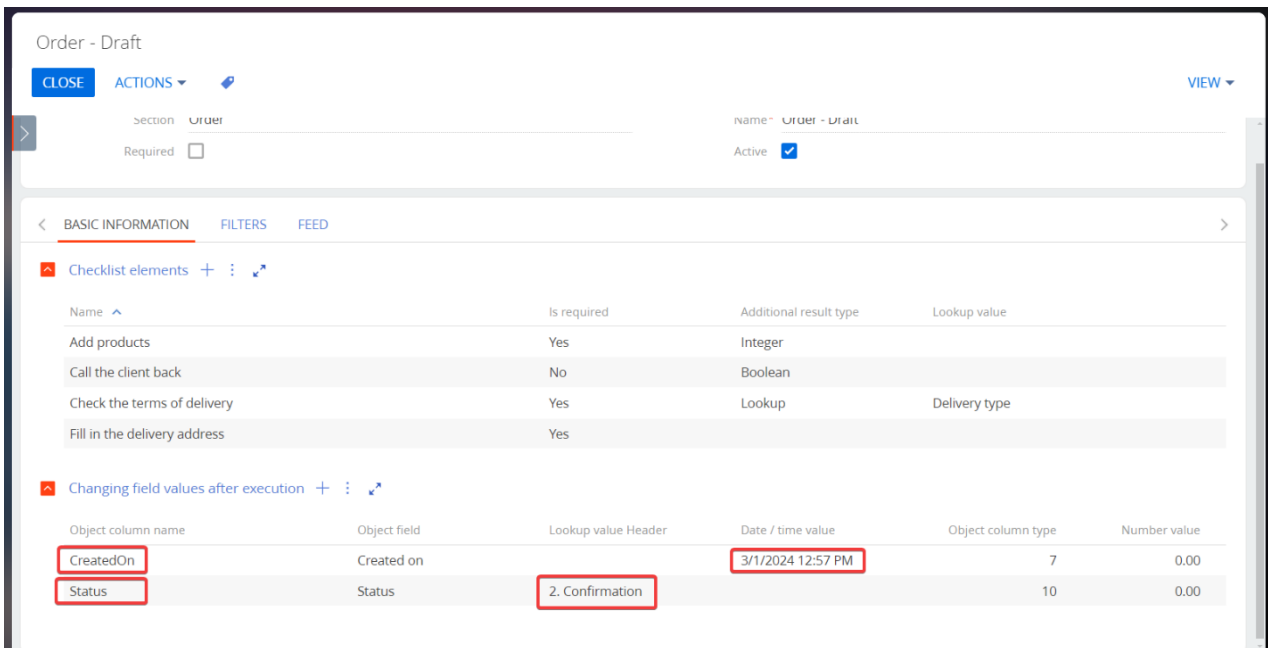
"Object field" - all fields of the object are available for selection (do not select Id Guid)

Depending on the selected object type in the "Object field" - the value will be available for selection or input (depending on the type of the selected field). For example, if the object field is a date, the values from the calendar will be available for input; if the object field is a contact, then values from the "Contacts" directory are available for selection; if the field of the object is notes, then text characters are available for input, etc. This change will be made after passing all the required steps of the checklist.



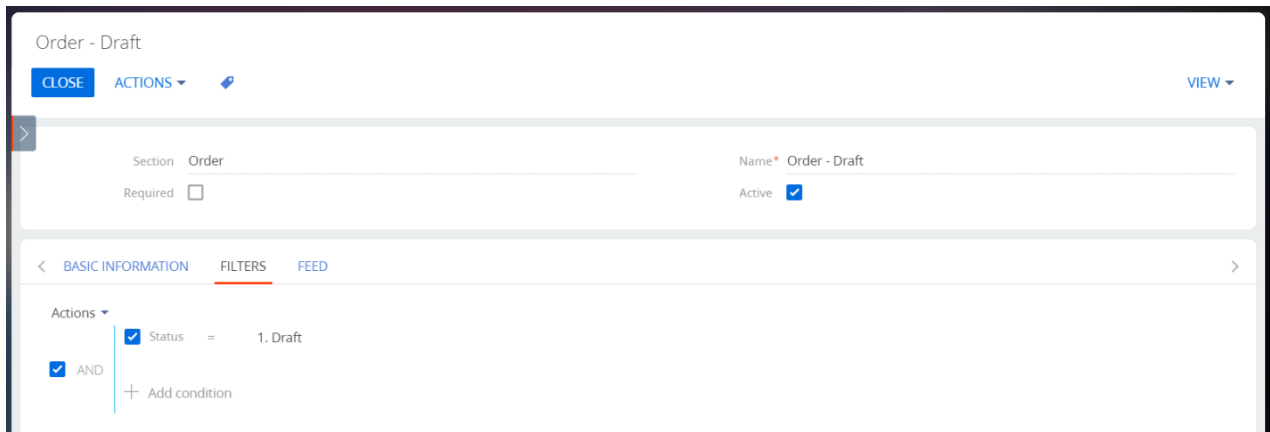


Note: You can add multiple fields to change values. All changes will be made after completing all the required steps of the checklist.



Configuration of a filter for selecting section objects

The functionality allows you to make a selection of objects from the section, in which the configured set of elements will be displayed in the "CHECK-LIST" tab. Implementation of settings - according to the basic functionality described at the academy in the «[advanced filters](#)» section. To configure, go to the "FILTERS" tab



Note: if there are two active checklist settings for the same object with the same filter in the section, then the checklist which was created earlier will be displayed in the section.

Displaying the "CHECK-LIST" tab on the object record page

Basic operations with records

On the record page of the section for which the "check-list" setting was created or was previously created, the "CHECK-LISTS" tab is displayed with the details:

Checklist – after the first saving of the record, the detail contains records of the checklist steps (if the object record matches the setting filter and the setting is active)

- *Add checklist step* – it is possible to add a checklist step locally for the current record by clicking on. After completing – is not added to the "History"

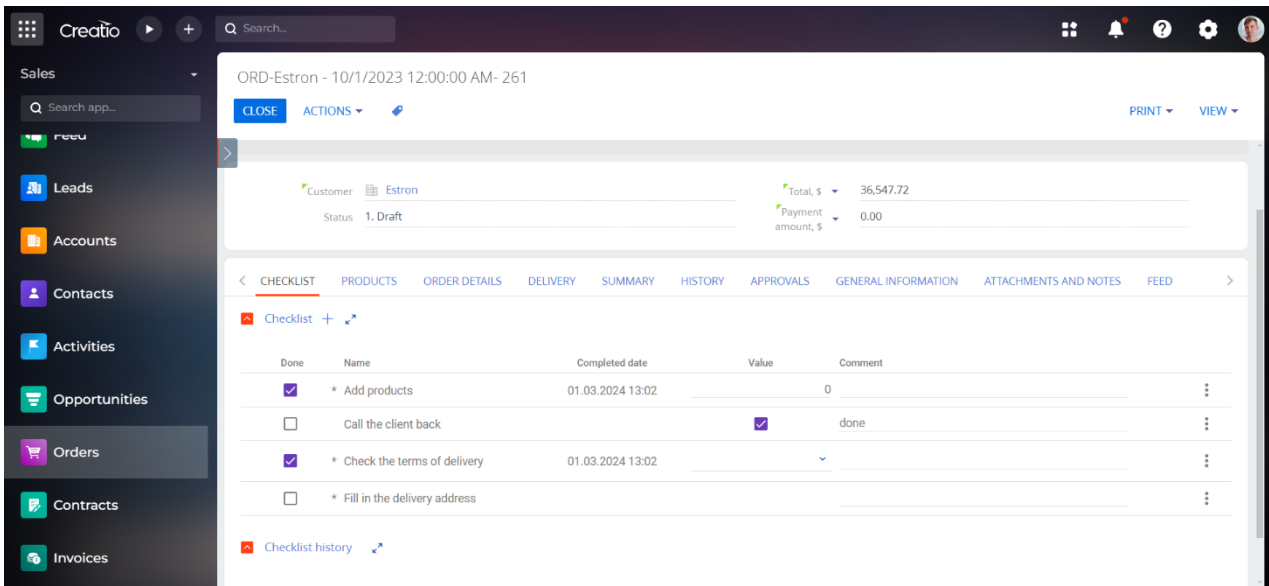
Checklist history - contains information about the execution, value and comments of completed checklist records. When all the required steps of the checklist are completed, a dialog box is displayed with confirmation of completion - after confirming the entry with the filled values, they go to the "Checklist History" detail

Close checklist?

NO

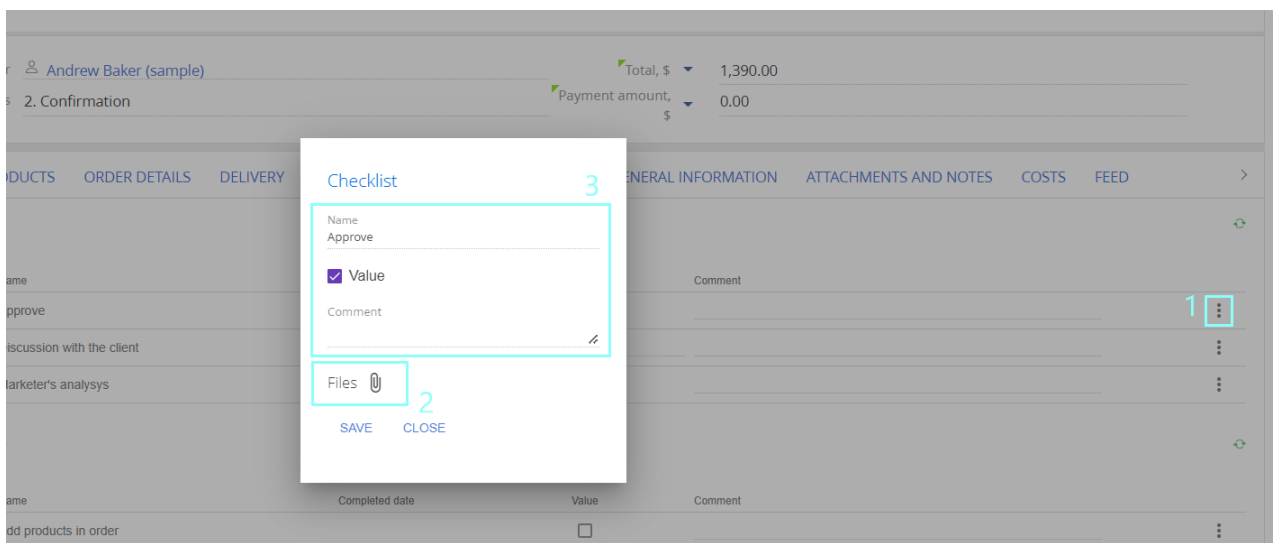
YES

Note: records are added to the "Checklist" detail while saving the records.



Additional operations with records

For records, additional configuration operations have been implemented:
Open – opens the selected record in a mini-card window to download an additional file as well as changes in values (except for records in the "history" section)



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