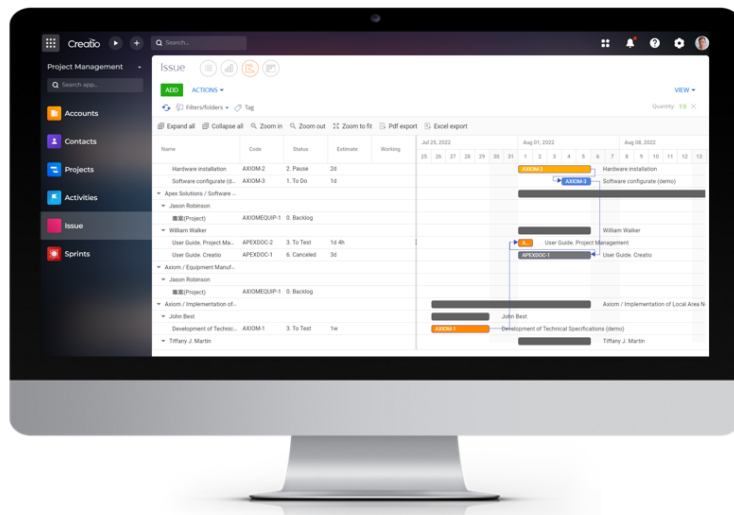




SALES'UP PROJECT MANAGEMENT FOR CREATIO



Guide to setup and utilization

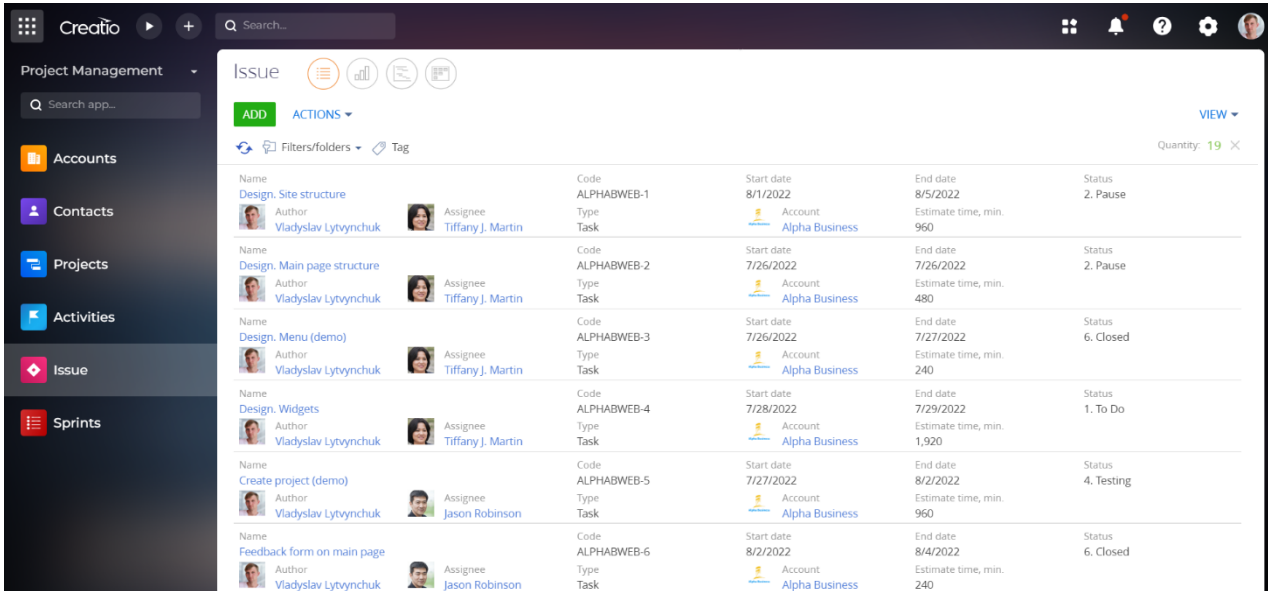
23.08.2023

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Product description

The **SALES'UP PROJECT MANAGEMENT FOR CREATIO** product – is a solution, that allows to carry out complex work with project tasks, create and display constituent parts of project for convenience of management. (Picture 1.1)



Picture 1.1

The product can be used by companies for planning and tracking project deadlines.

Use cases

- Visual project management;
- Tracking dependencies among tasks;
- Tracking the progress of the project;
- Product launch planning;

Opportunities

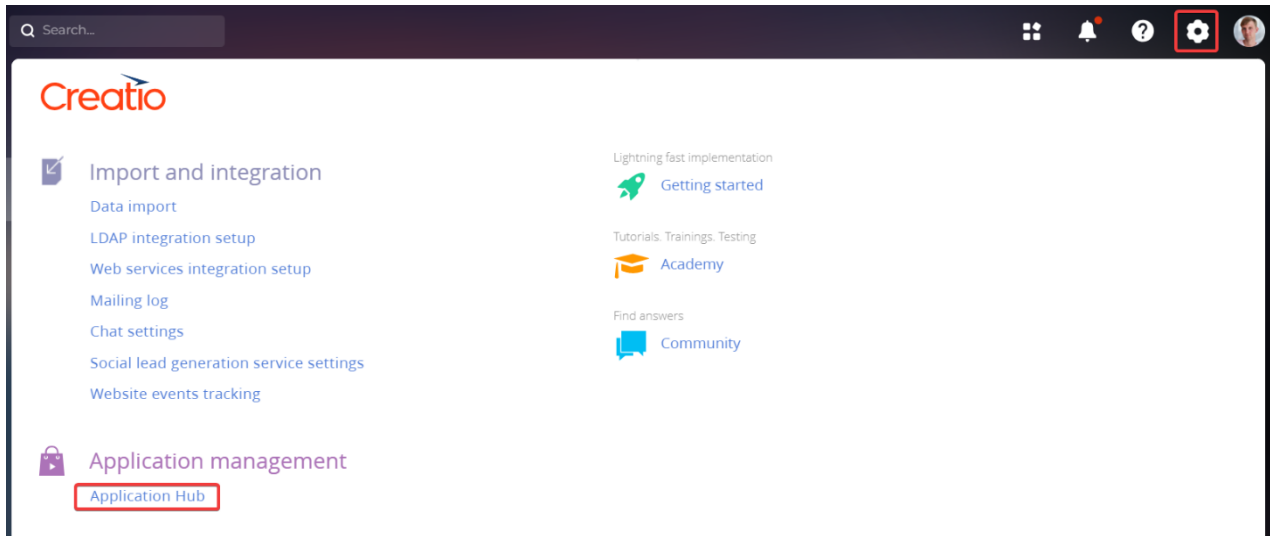
- Filtering display settings (Date, Owners, Projects, etc.);
- Quick transition to tasks;
- Creation and management of tasks;
- View and control the execution time of tasks;
- Task management with ability to divide them into sprints.

Technical requirements

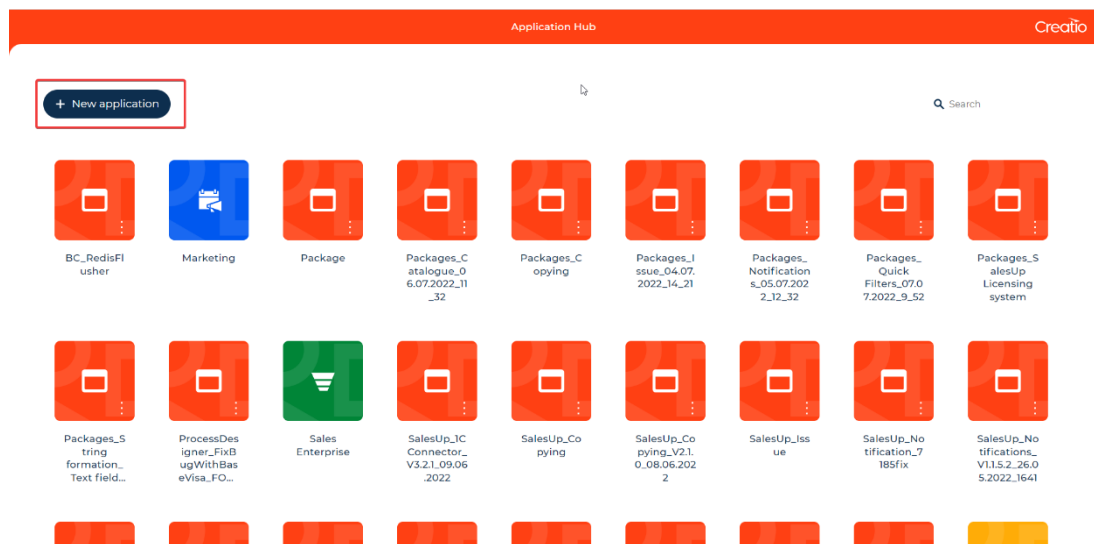
The product is compatible with all the products on the Creatio platform of version 7.16.1 and higher.

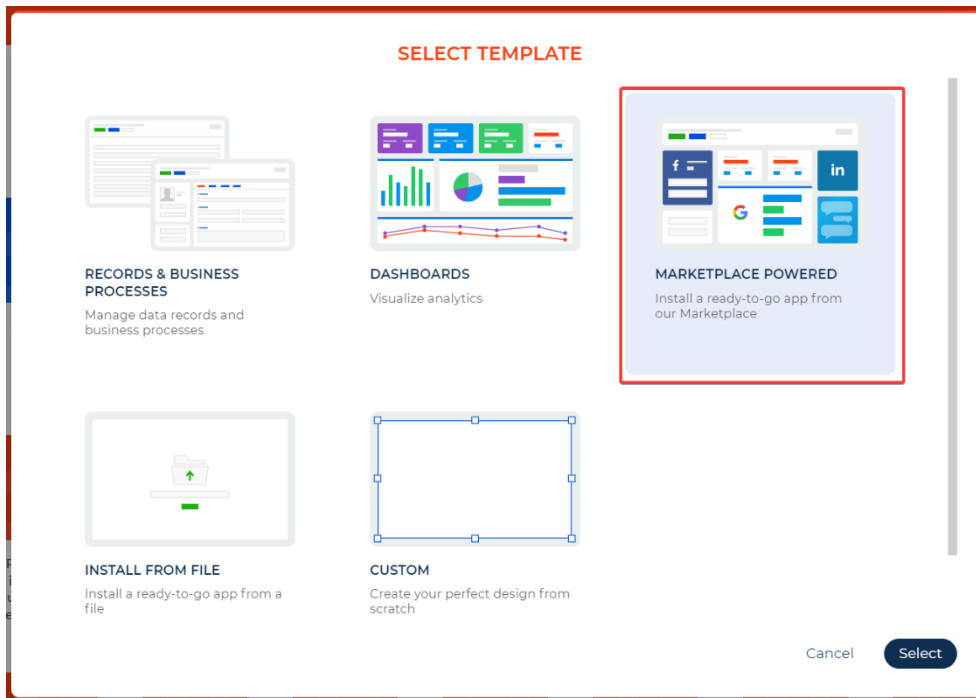
Product installation and setup

To install packages go to «System Designer» and select «Application Hub»

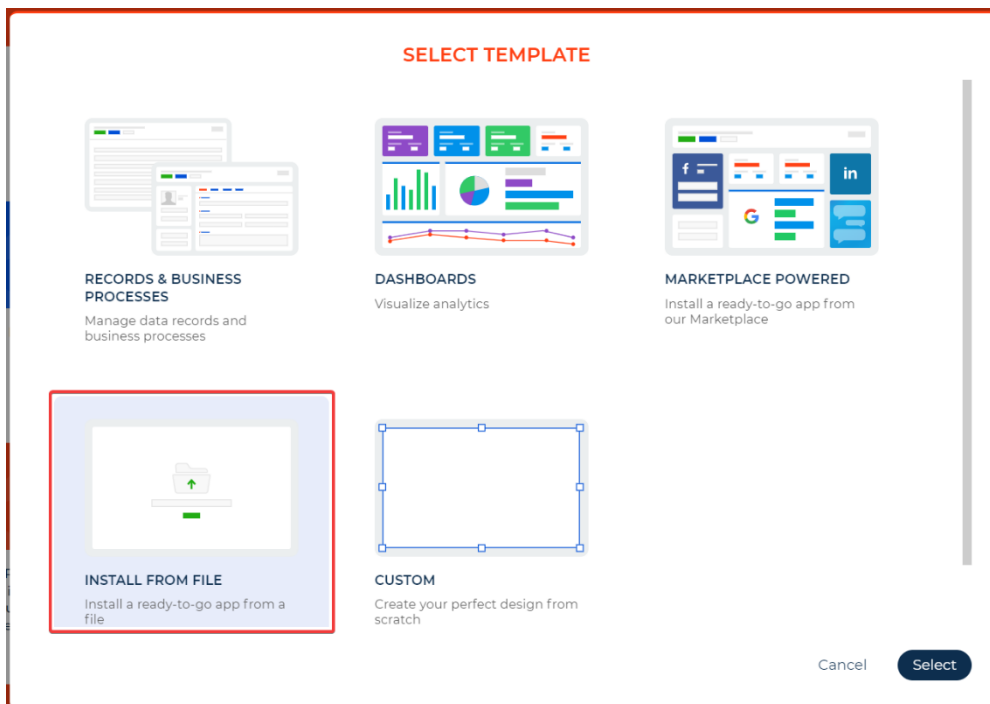


On the «Application Hub» page, click on the button «New Application», then select template from «Marketplace powered», enter the booth address and press «Install».





Upon installation of application package from a file, you must request an up-to-date package from Sales'Up support. Next, on the «Applications Hub» page click on the button «New Application», then press «Install from file», specify the path to the archive with the package and complete the installation.



General settings

Issue

To add new task, you must:

Go to the «Issue» section and click on the button «Add» (Picture 2.1)



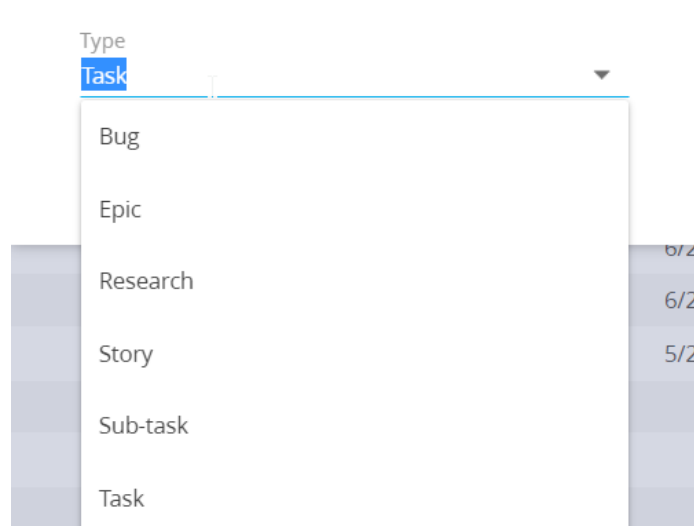
Picture 2.1

Fill in the required and optional fields in the modal window that opens. (Picture 2.2):

- Task name (Obligatory to fill in);
- Project (Obligatory to fill in);
- Subproject;
- Work;
- Type (Select from the list (Picture 2.3));

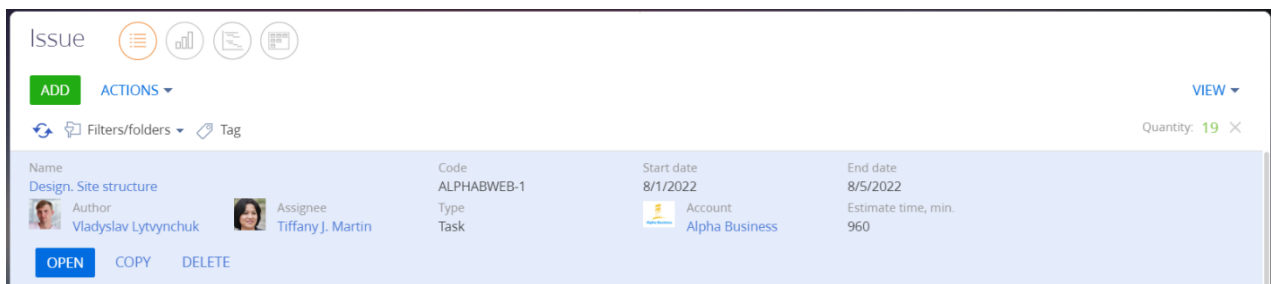
Input name	
Start date	End date
Author Vladyslav Lytvynchuk	Assignee
Project	
Subproject	Work
Sprint	
Type Task	

Picture 2.2



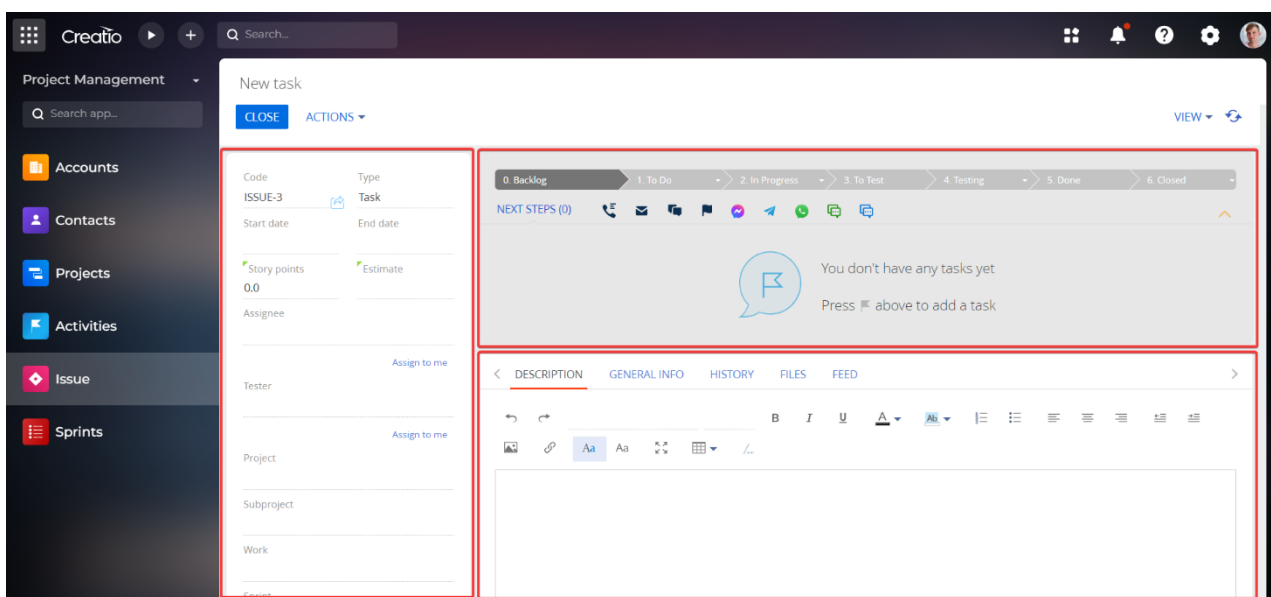
Picture 2.3

After saving the task, it is displayed in the registry section «Issue». For more detailed data filling, you need to go to the task record. The task can be opened by clicking on the corresponding button (Picture 2.4) or by double-clicking on the record outline.



Picture 2.4

On the task's record page, 3 blocks are displayed (Picture 2.5)



Picture 2.5

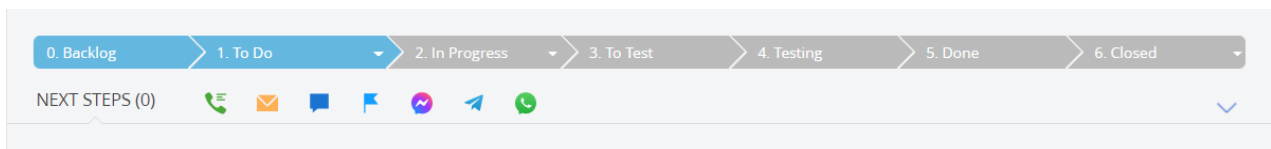
In the **record page profile** (Block 1), provide the following informatio:

- Date (Start date and end date of the task)
- Story Points (Field for specifying the number of Story Point for the current task)
- Estimate (Estimated time to complete the task, specified in the format 1w;1d;1h;1m (One week, one day, one hour, one minute)
- Assignee (Field for selecting a contact in the system, who will perform this task)
- Tester (Field for selecting a contact in the system, who will test this task)
- Epic (In this field, you can specify in which task the current one was created)
- Author

The fields **Code, Name, Project, Work, Type** will be pre-filled with the values specified when creating a new task.

In the **record header** (Block 2) there are dynamic cases (Picture 2.6) (task statuses):

- Backlog
- To Do
- In progress
- To test (for testers).
- Testing
- Done
- Closed



Picture 2.6

Block 3 contains tabs (Picture 2.7) with detailed information about the task.

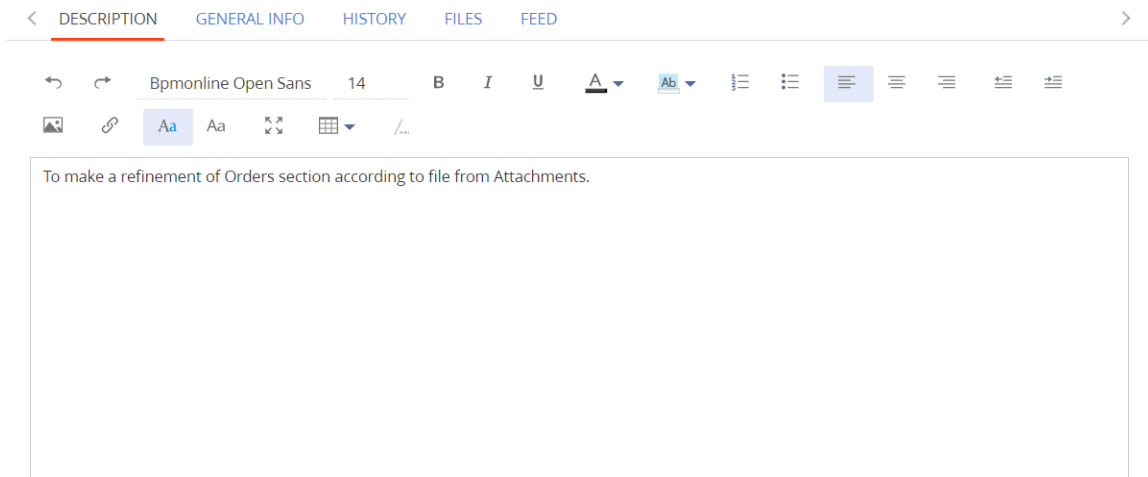
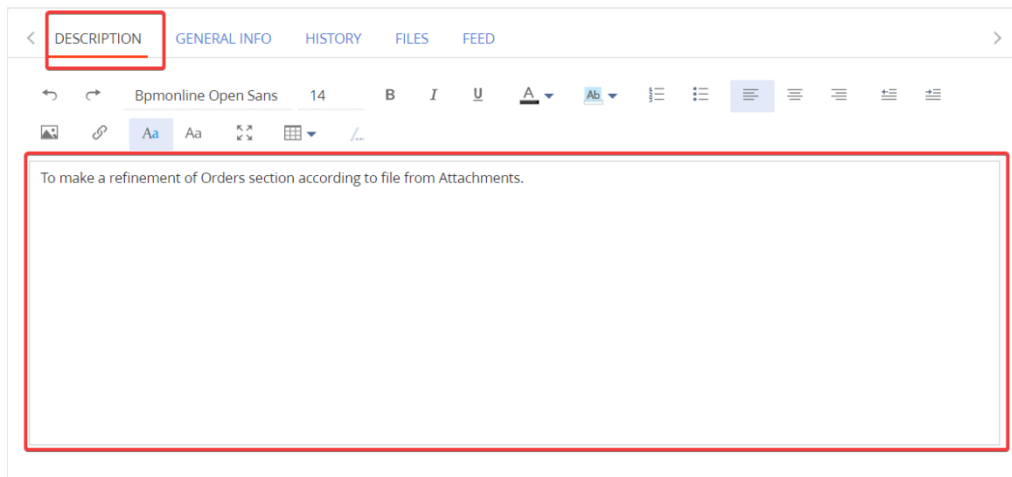


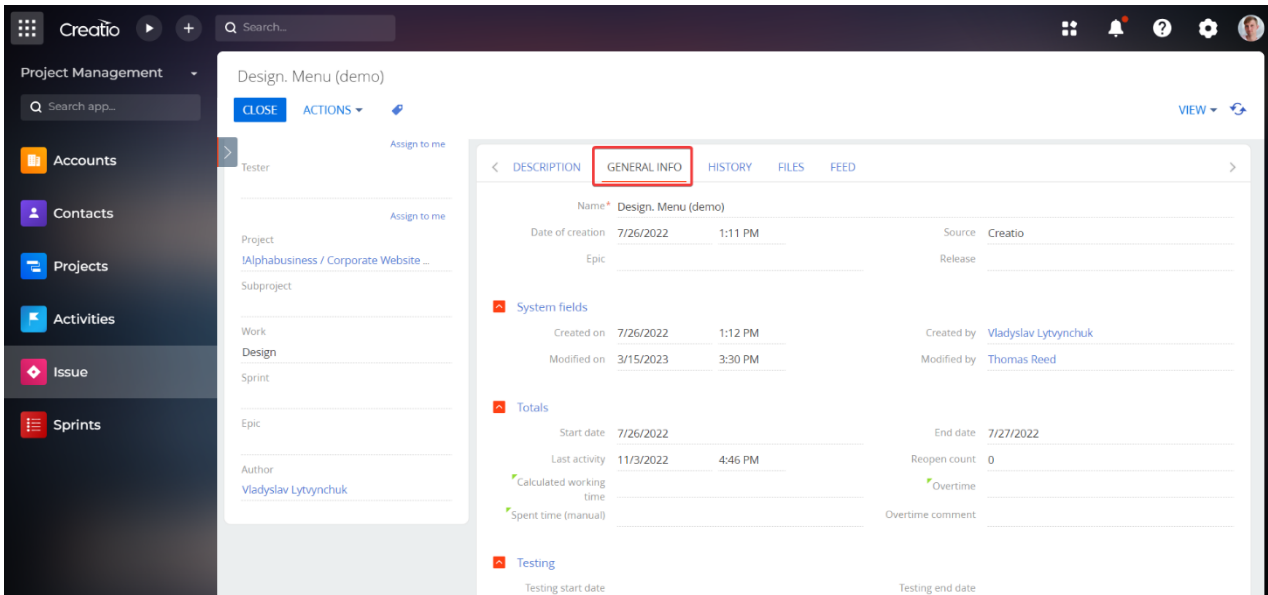
Рис № 2.7

On the **Description** tab (Picture 2.8), in the text block, you must specify a description of the task, which should be performed. In the input field you can attach pictures, screenshots, links, as well as changing the font, its size, etc.



Picture 2.8

On the «**General info**» tab (Picture 2.9) the main information about the task is entered and stored, namely:



Picture 2.9

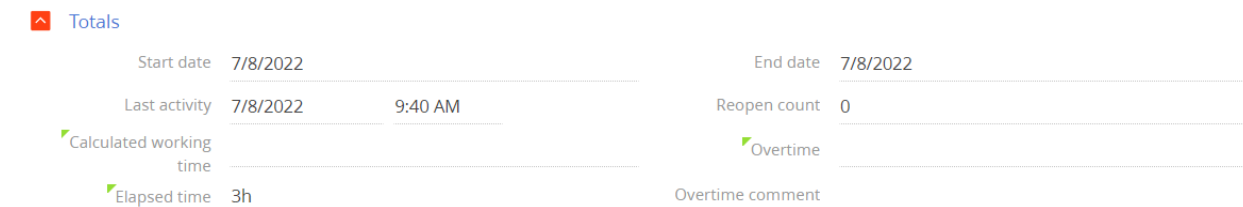
- Name (the name of the task can be changed if necessary)
- Date of creation (Not available for editing, date and time are filled in automatically when creating a task)
- Source
- Epi
- Release

In the **System fields** group of fields (Picture 2.10) are the fields that are unavailable for editing and are filled in automatically when creating/changing a task.



Picture 2.10

In the **Totals** group of fields (Picture 2.11), the elapsed time and comment are indicated, other fields are filled in automatically.



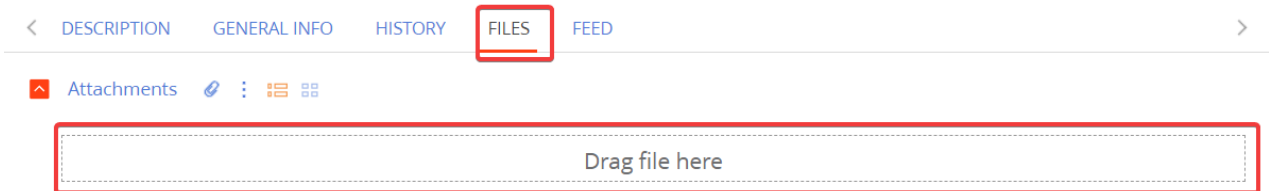
Picture 2.11

The **Link** detail (Picture 2.12) indicates the connection of the current task with other tasks.

Comment	Linked issue	Issue	Link type
	Refinement of Orders section	Orders section Refinement	Related

Picture 2.12

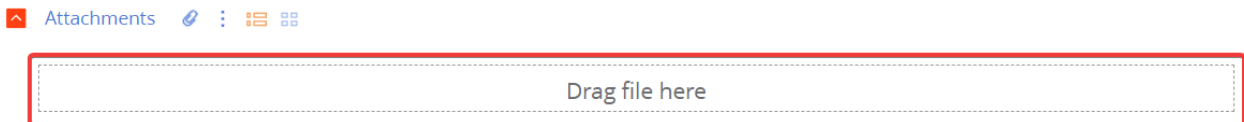
On the File tab (Picture 2.13), if necessary, files of any format are attached.




Picture 2.13

You can attach a file in **two** ways:

- Drag a file on the «Drag file here» field (Picture 2.14)



Picture 2.14

- Click on the icon  and in dialogue window, choose the file.

Projects

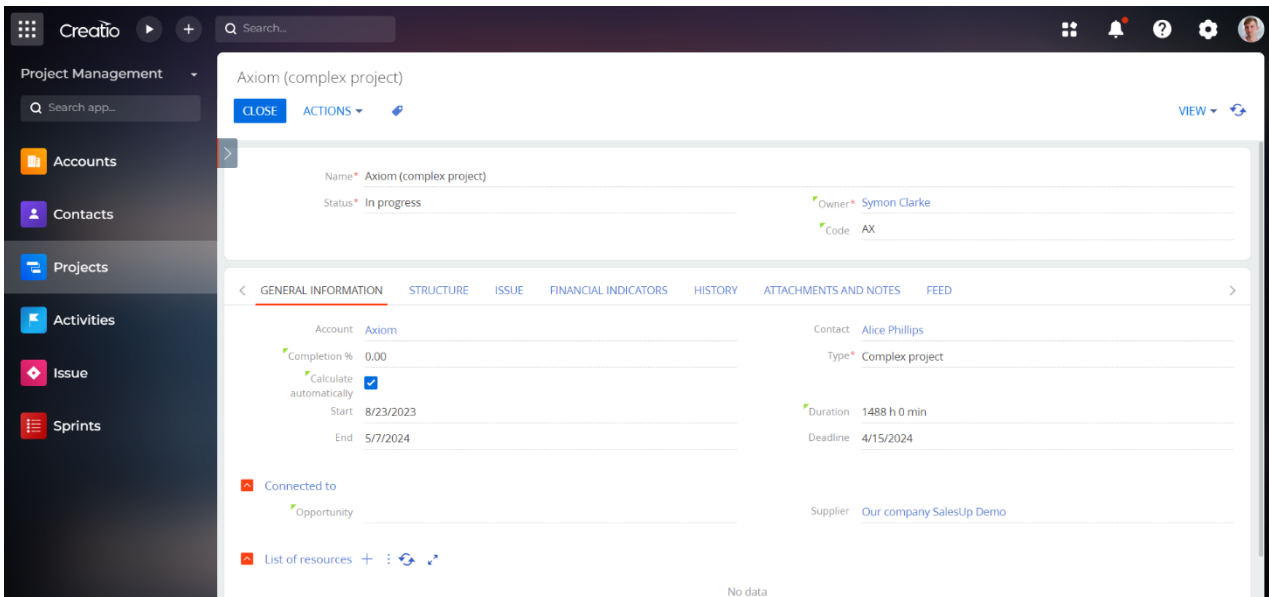
To create a project:

Go to the «Projects» section and click the «**New**» button (Picture 3.1).



Picture 3.1

On the new section record page that opens, fill in the following fields: (Picture 3.2).

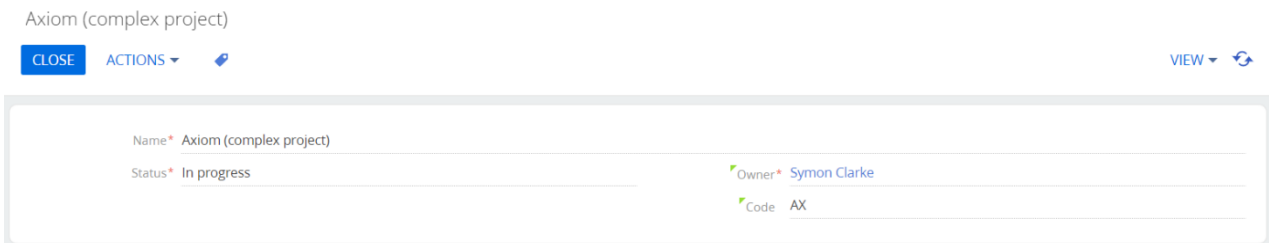


Picture 3.2

In the page header (Picture 3.3) fill in the project data:

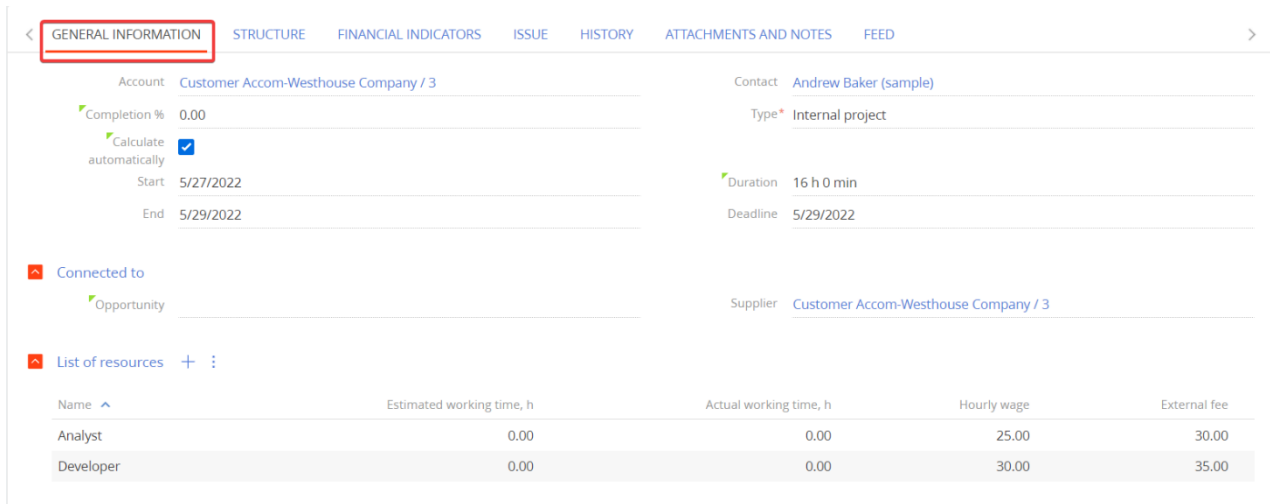
- Name (Required)
- Status (Required)
- Owner (Required)
- Code (It is needed to display task number in the «Issue» section)

This fields are mandatory to fill in.



Picture 3.3

On the «General information» tab (Picture 3.4), provide general information about the project:



Picture 3.4

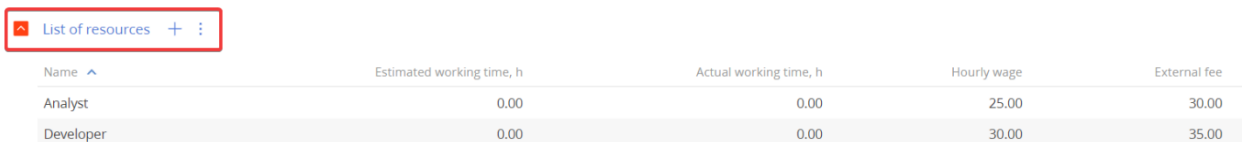
- Account
- Contact
- Completion %
- Calculate automatically (Boolean field, enabling automatic calculation of % of project completion)
- Start
- End
- Deadline
- Duration (calculated automatically based on working hours)

In the «**Connected to**» fields group (Picture 3.5) indicate the connection of the document with the sale and the supplier.




Picture 3.5

On the «**List of resources**» detail (Picture 3.6) indicate the employees, who are involved in the work on the project.



Picture 3.6

To add an employee to the «List of resources», click on , after which the window for adding a new resource will open (Picture 3.7).

In the opened window, specify:

- Project (filled in automatically);
- Name
- Contacts
- Wage
- External fee

Project	TechLightEast
Name*	Analyst
Contact*	Sam Davidson
Wage, \$	25.00
External fee, \$	30.00
Expected working time, h	0.00
Actual working time, h	0.00

Picture 3.7

On the «Structure» tab (Picture 3.8), specify data about project structure.

<	GENERAL INFORMATION	STRUCTURE	FINANCIAL INDICATORS	ISSUE	HISTORY	ATTACHMENTS AND NOTES	FEED	>
+	Structure	↑ ↓ + :						
Name	Start date	End date	Project record type					
+ Orders connection	5/27/2022		Project task					
- Development	5/27/2022		Project task					
Products section	5/27/2022	5/29/2022	Project task					

Picture 3.8

The second and third levels correspond to the «Subproject» and «Work» fields in the task (Picture 3.9) accordingly.

Issue

Input name

Project

Subproject
Development

Work
Products section

Type
Task

SAVE CANCEL

Picture 3.9

The «Financial indicators» tab (Picture 3.10), when filling in the «Cash flows» detail, it allows you to calculate the financial indicators of the project.

Indicator	Expected	Actual	Deviation	Deviation, %
Revenue	0.00	1,630.00	1,630.00	0.00
Total outflow	0.00	1,550.00	1,550.00	0.00
Total cost	0.00	0.00	0.00	0.00
Prime cost	0.00	0.00	0.00	0.00
Margin	0.00	80.00	80.00	0.00
Margin, %	0.00	4.91		

Type	Date	Purpose	Amount, base currency
Total outflow	5/27/2022	Payments to contractors	-1,300.00
Total outflow	5/27/2022		-200.00
Inflow	5/27/2022	Purchase of consumables	130.00
Total outflow	5/27/2022	Overhead costs	-50.00
Inflow	5/27/2022	Prepayment	1,500.00

Picture 3.10

To add new record to the «Cash flows» detail, press on the «+», after which the window for adding a new record will open (Picture 3.11)

Axiom (complex project) / Cash flow

CLOSE

Number	1	Project	Axiom (complex project)
Purpose			
Date	8/23/2023	Status*	Completed
Type*	Inflow	Category	Payment for services
Amount, \$	0.00		

Picture 3.11

On the registration page that opens, fill in the following fields :

- Number (Filled in automatically)
- Project (Filled in automatically)
- Purpose
- Date (Filled in automatically)
- Status
- Type
- Amount
- Category

The «Issue» tab (Picture 3.12), on the «Issues» detail, the tasks connected to the project are displayed. When specifying a release in the task, a chart will be displayed on the «Issue releases» detail showing the percentage of tasks completed for the release and tasks that are in progress.

< GENERAL INFORMATION STRUCTURE FINANCIAL INDICATORS **ISSUE** HISTORY ATTACHMENTS AND NOTES FEED >

Issue releases + :

Name	Project	Status	Progress
Q2_Sprint 1	TechLightEast	UNRELEASED	<div style="width: 100%; height: 10px; background-color: #0070C0; position: relative;"><div style="width: 75%; background-color: #92D050;"></div></div>




Issues + :

Name	Description	Code	Type	Status
Products. Change the field layout		TLE-7	Task	3, To Test
Account. Change list of columns		TLE-12	Bug	3, To Test
Add the pricing logic	Perform pricing settings according to the document from the customer, the document is attached to the task.	TLE-2	Task	5, Done
Update packages		TLE-9	Task	3, To Test
Account. Change field on General information tab	Remove the fields on General information tab	TLE-13	Task	5, Done
Delivery order to client		TLE-1	Task	0, Backlog

Picture 3.12



The «Attachments and notes» tab (Picture 3.13), if necessary, you can add files of any format. In the «Notes» field, You can specify a comment on the project, if necessary.




























< GENERAL INFORMATION STRUCTURE FINANCIAL INDICATORS ISSUE HISTORY **ATTACHMENTS AND NOTES** FEED >

Attachments   

Drag file here

Notes

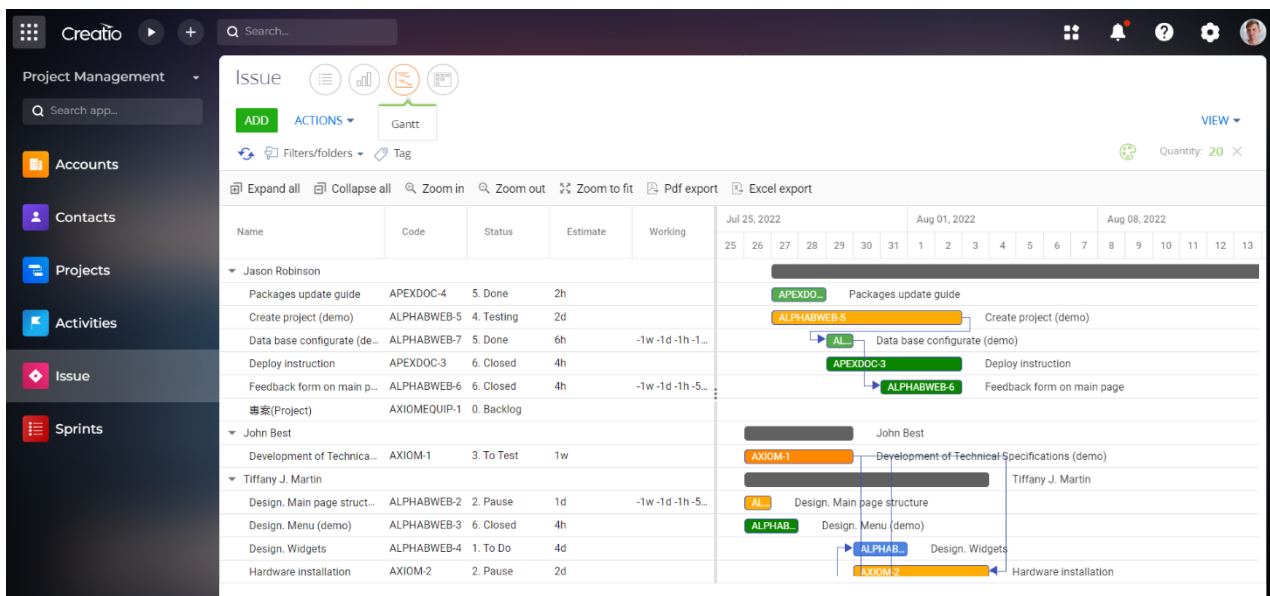
B *I* U A Ab                           

Gantt Chart

One of the components of the Issue solutions is the **Gantt Chart** (Picture 4.1) which is a project management tool.

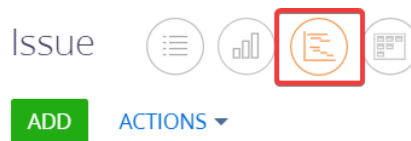
The chart is used for:

- Creatin a complex project and managing it
- Tracking organizational work and dependencies between tasks
- Tracking project deadlines



Picture 4.1

For displaying Gantt chart, you must go to the chart view in the Issue section located in the upper left corner. (Picture 4.2)

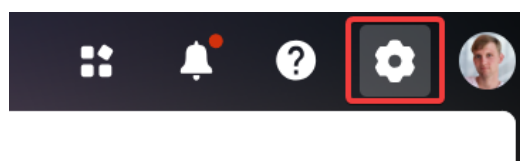


Picture 4.2

Setting up Gantt chart is performed for any section of the system in which there are columns for the start date and end date.

To setup Gantt chart:

1. Go to System designer;



2. In the block system settings go to the «Data views» section;



SalesUp System setup

SalesUp license manager

Data views

3. In the registry field press the button «Add».

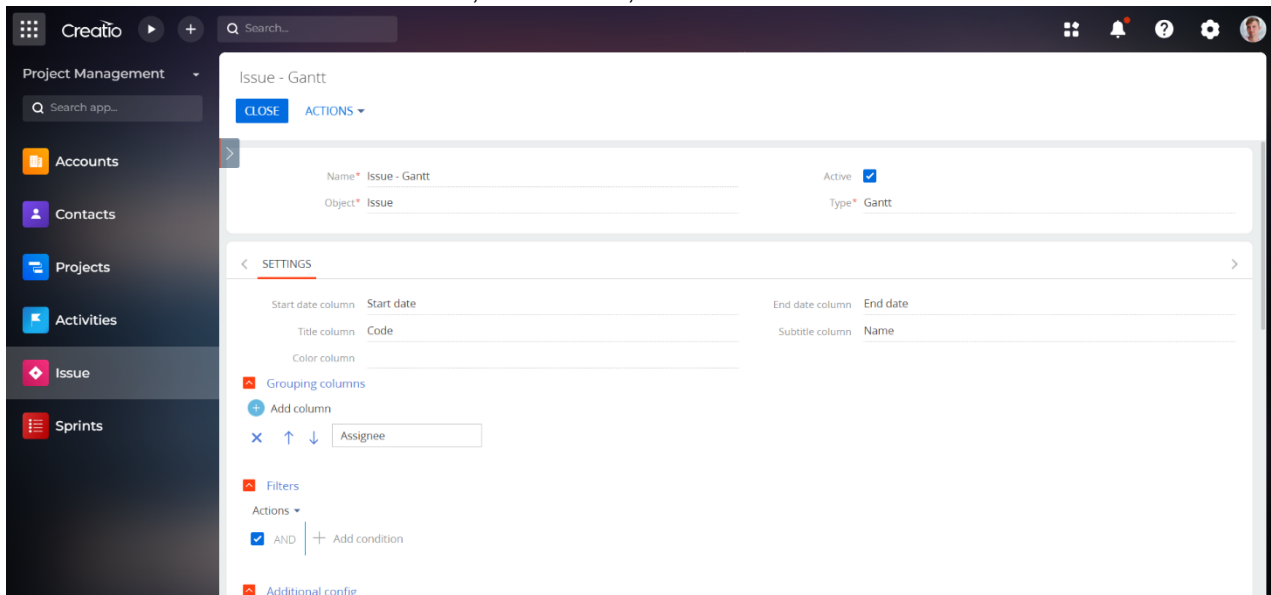
On the setting page, you need to fill in the fields (Picture 5.1.1):

Start date column – for example, the start date of the Contract;

End date column - for example, Contract termination date;

Title column – the name of the element, for example, the number of the Contract;




Subtitle column – additional information, such as title;




Picture 5.1.1

Color column – if the object has a color column, this can be displayed on the board (Picture 5.1.2). In the «Grouping columns» setting, you can configure the hierarchy for displaying records on the

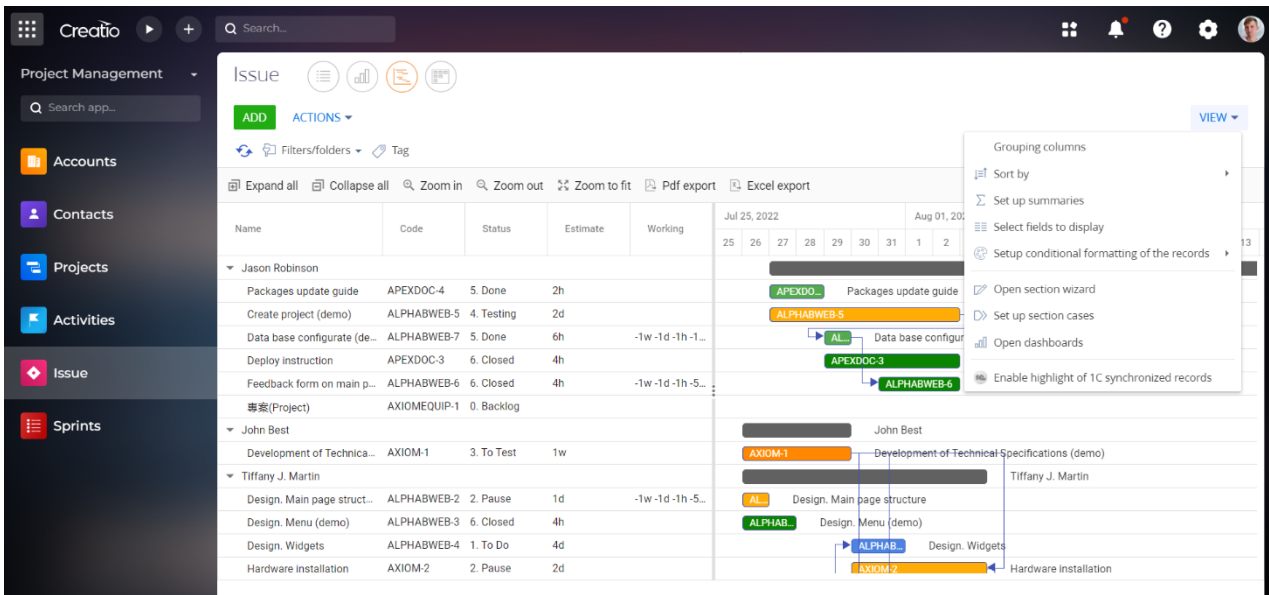
chart. To add a hierarchy level, click  Add column

Functions have been created to change/delete levels   

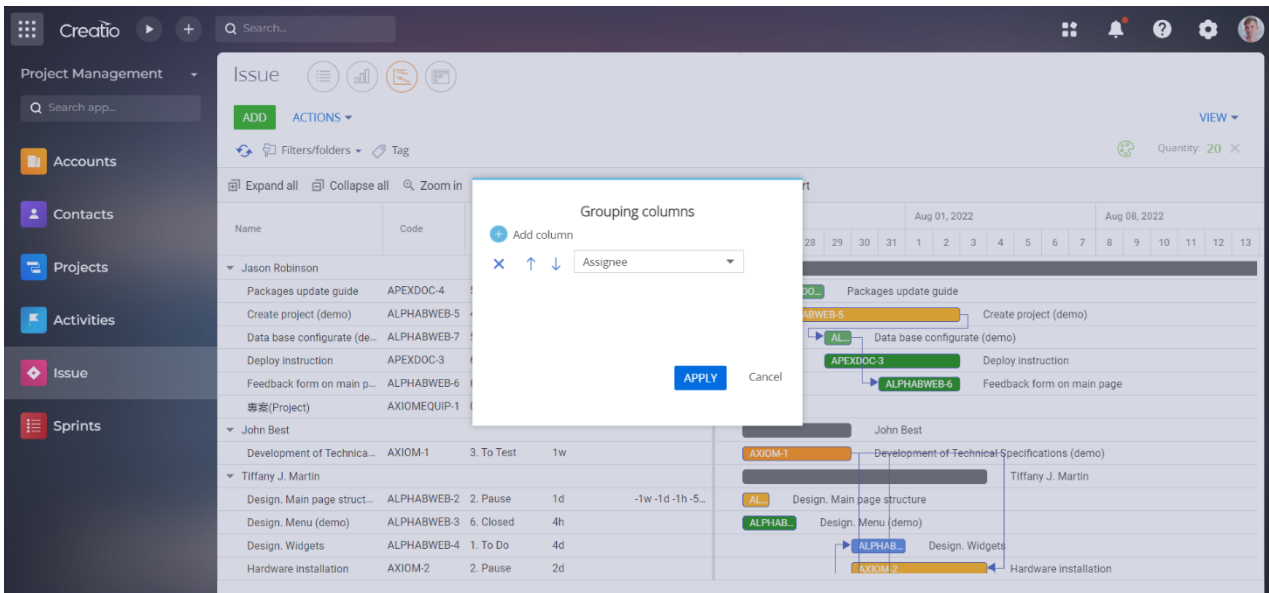
In the «Filters» setting, filters are set by which the record gets into the charts.

To complete the setting, press 

The user can change the hierarchy on the Gantt chart personally for himself, to do this, go to the Gantt chart, open the "View" menu (Picture 5.1.3) and select "Grouping columns". (Picture 5.1.4) In this way, the user can change the hierarchy, which will take precedence over the general setting for a particular user.



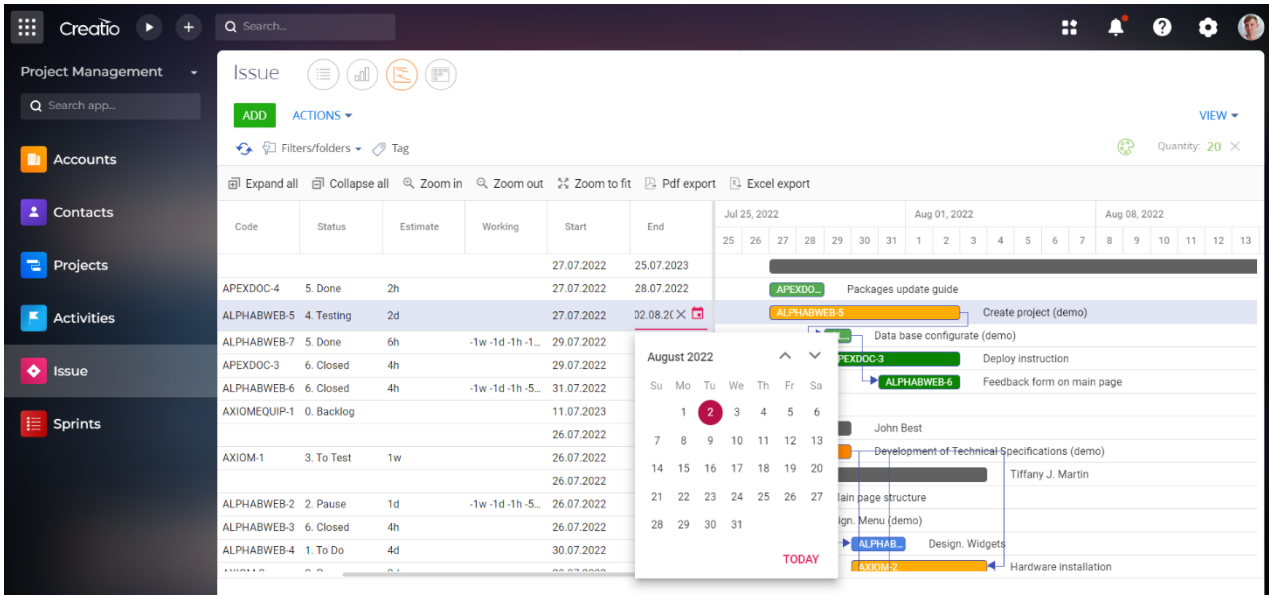
Picture 5.1.3



Picture 5.1.4

Using the Gantt chart view, the user can change the start and end dates for a record by dragging the record block on the chart or changing the start date and end date by double-clicking the corresponding column in the chart registry (Picture 5.1.5).

This feature is only available for Date format columns, as in the example in the Contracts section below. If the format of the Date/Time column is the same as the date of registration in Cases, the change works only by dragging the case.



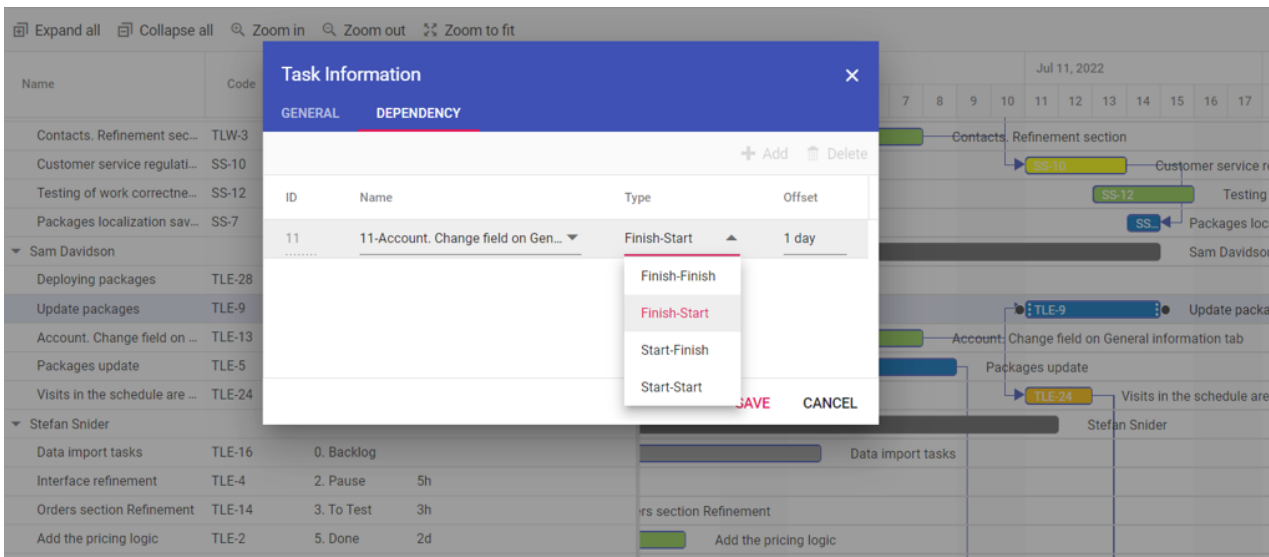
Picture 5.1.5

For the convenience of finding the display of the block on the Gantt chart, with a single click on the required record in the chart registry, the block with the task will be pulled to the chart with the focus on the start date.

If in the section for which the Gantt chart is configured, there is a link detail, then such a link can be displayed on the chart.

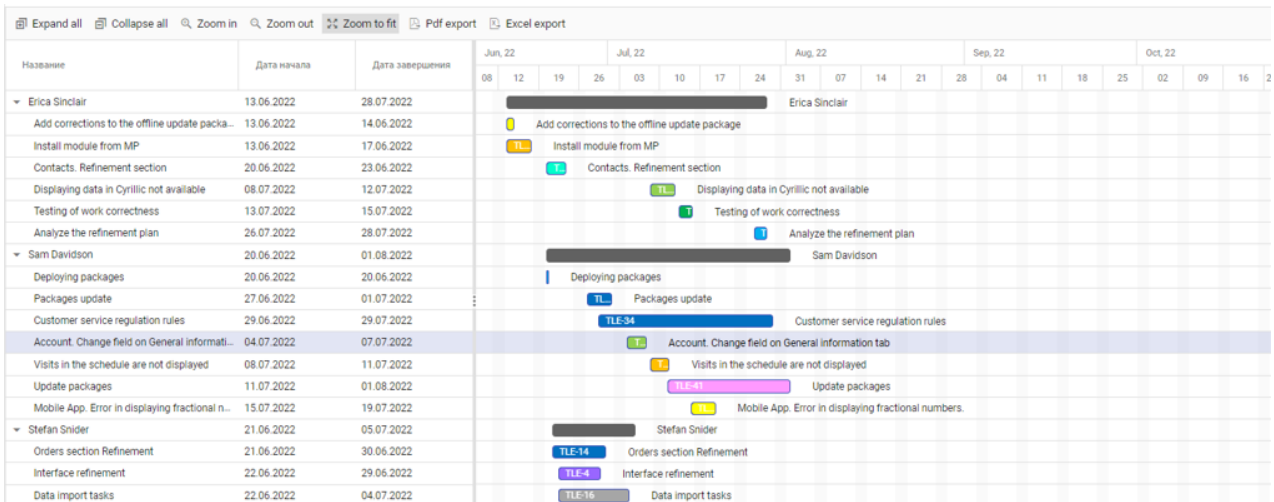
There are 4 linking types (Picture 5.1.6):

- Start - Start;
- Start - End;
- End - End;
- End - Start.



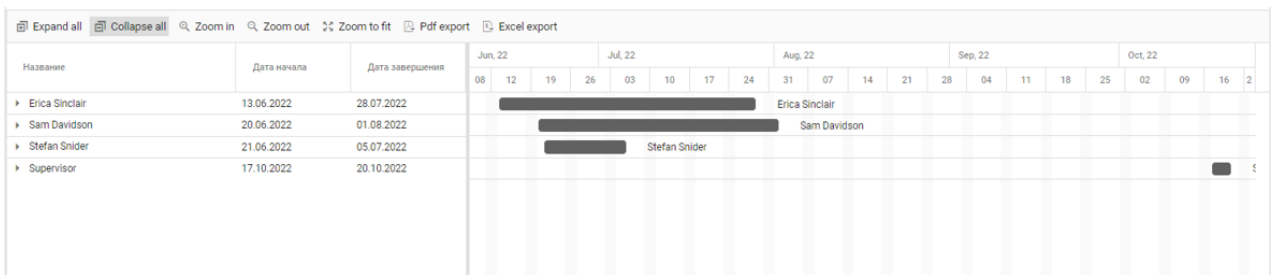
Picture 5.1.6

Using the «Zoom to fit» button (Picture 5.1.7) diagram will display all the blocks adapted to the size of the time scale set for the diagram.

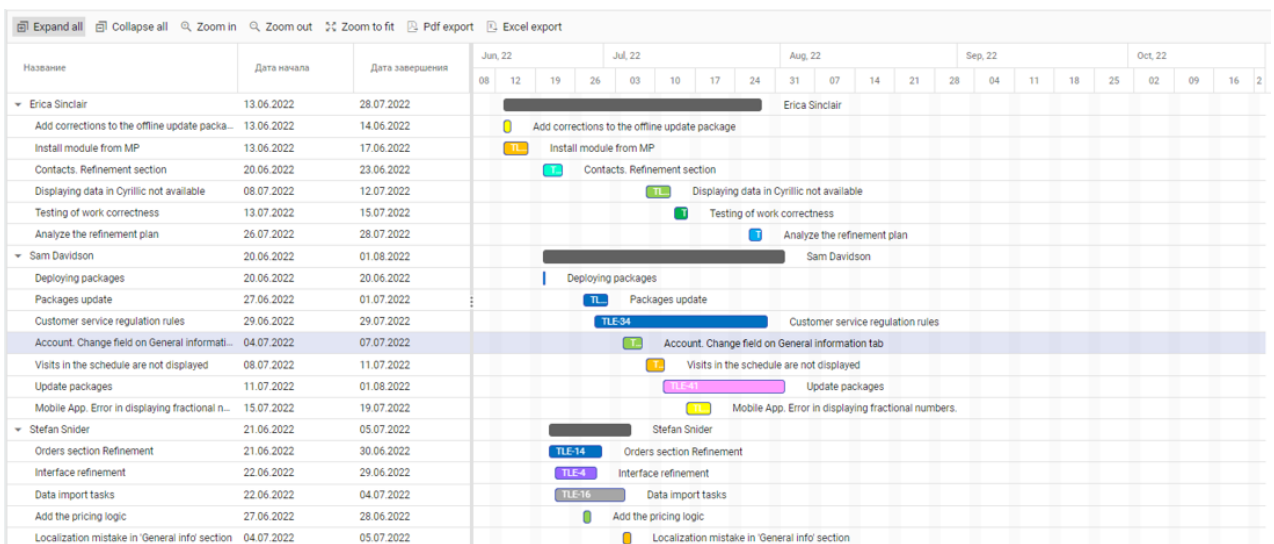


Picture 5.1.7

The «Collapse all» (Picture. 5.1.8) and «Expand all» (Picture 5.1.9) buttons allow you to hide or expand, respectively, the hierarchy configured for the chart registry, displaying the timeline along the top level of the hierarchy on the chart. Each click collapses/expands on top level. If there are 3 levels, you need to click 3 times to collapse/expand everything.

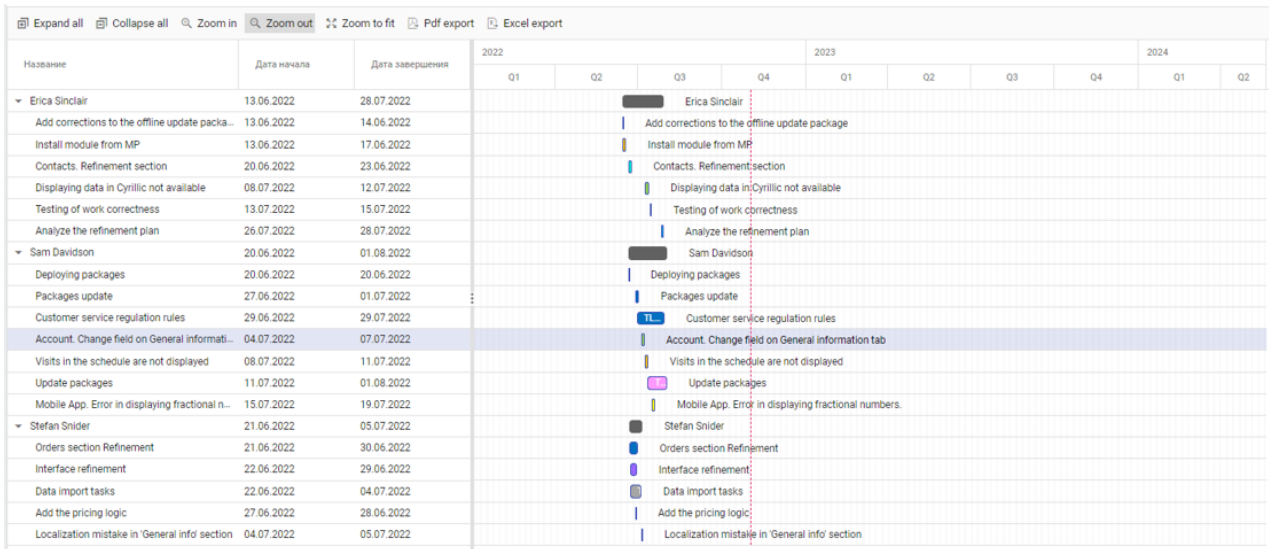


Picture 5.1.8



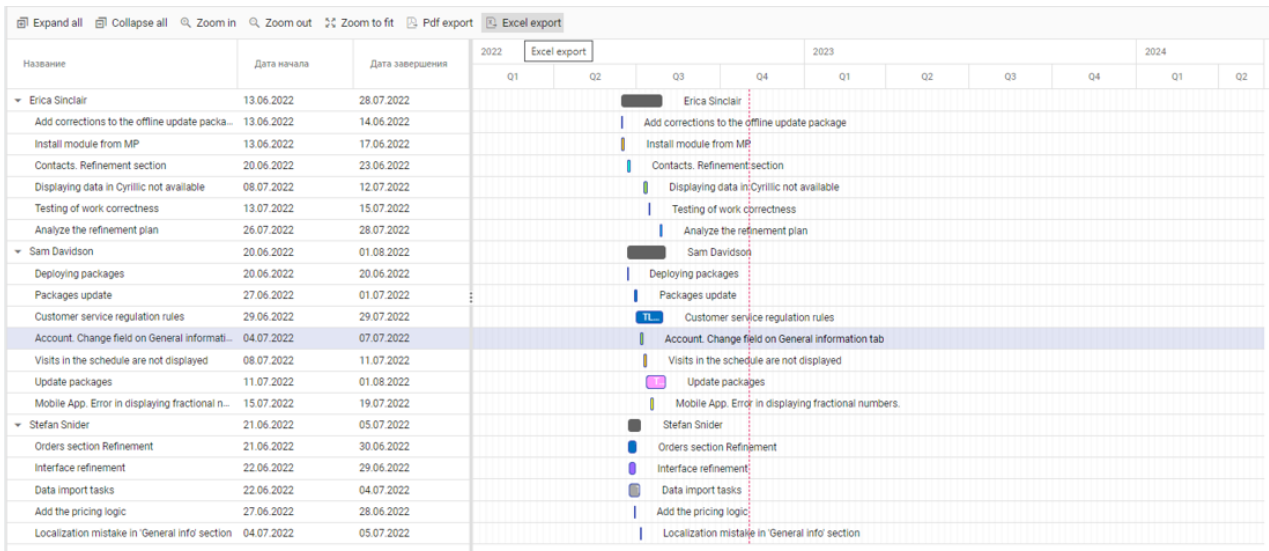
Picture 5.1.9

Using the «Zoom in» and «Zoom out» buttons (Picture 5.1.10) the scale of the chart period is changed.



Picture 5.1.10

To present a Gantt chart, there is a function to export data to excel (Picture 5.1.11 и Picture 5.1.12) and PDF files. When exporting to excel, the configured hierarchy and chart registry columns are uploaded to the file.



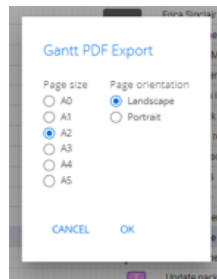
Picture 5.1.11

	A	B	C	D
1	Название	Дата начала	Дата завершения	
2	Erica Sinclair	2022-06-13T05:00:00.000Z	2022-07-28T14:00:00.000Z	
3	Add corrections to the offline update package	2022-06-13T05:00:00.000Z	2022-06-14T14:00:00.000Z	
4	Install module from MP	2022-06-13T05:00:00.000Z	2022-06-17T14:00:00.000Z	
5	Contacts. Refinement section	2022-06-20T05:00:00.000Z	2022-06-23T14:00:00.000Z	
6	Displaying data in Cyrillic not available	2022-07-08T05:00:00.000Z	2022-07-12T14:00:00.000Z	
7	Testing of work correctness	2022-07-13T05:00:00.000Z	2022-07-15T14:00:00.000Z	
8	Analyze the refinement plan	2022-07-26T05:00:00.000Z	2022-07-28T14:00:00.000Z	
9	Sam Davidson	2022-06-20T05:00:00.000Z	2022-08-01T14:00:00.000Z	
10	Deploying packages	2022-06-20T05:00:00.000Z	2022-06-20T14:00:00.000Z	
11	Packages update	2022-06-27T05:00:00.000Z	2022-07-01T14:00:00.000Z	
12	Customer service regulation rules	2022-06-29T05:00:00.000Z	2022-07-29T14:00:00.000Z	
13	Account. Change field on General information tab	2022-07-04T05:00:00.000Z	2022-07-07T14:00:00.000Z	
14	Visits in the schedule are not displayed	2022-07-08T05:00:00.000Z	2022-07-11T14:00:00.000Z	
15	Update packages	2022-07-11T05:00:00.000Z	2022-08-01T14:00:00.000Z	
16	Mobile App. Error in displaying fractional numbers.	2022-07-15T05:00:00.000Z	2022-07-19T14:00:00.000Z	
17	Stefan Snider	2022-06-21T05:00:00.000Z	2022-07-05T14:00:00.000Z	
18	Orders section Refinement	2022-06-21T05:00:00.000Z	2022-06-30T14:00:00.000Z	
19	Interface refinement	2022-06-22T05:00:00.000Z	2022-06-29T14:00:00.000Z	
20	Data import tasks	2022-06-22T05:00:00.000Z	2022-07-04T14:00:00.000Z	
21	Add the pricing logic	2022-06-27T05:00:00.000Z	2022-06-28T14:00:00.000Z	
22	Localization mistake in 'General info' section	2022-07-04T05:00:00.000Z	2022-07-05T14:00:00.000Z	
23	Delivery order to client	2022-07-05T05:00:00.000Z	2022-07-05T14:00:00.000Z	
24	Supervisor	2022-10-17T05:00:00.000Z	2022-10-20T14:00:00.000Z	
25	Project documentation	2022-10-17T05:00:00.000Z	2022-10-20T14:00:00.000Z	

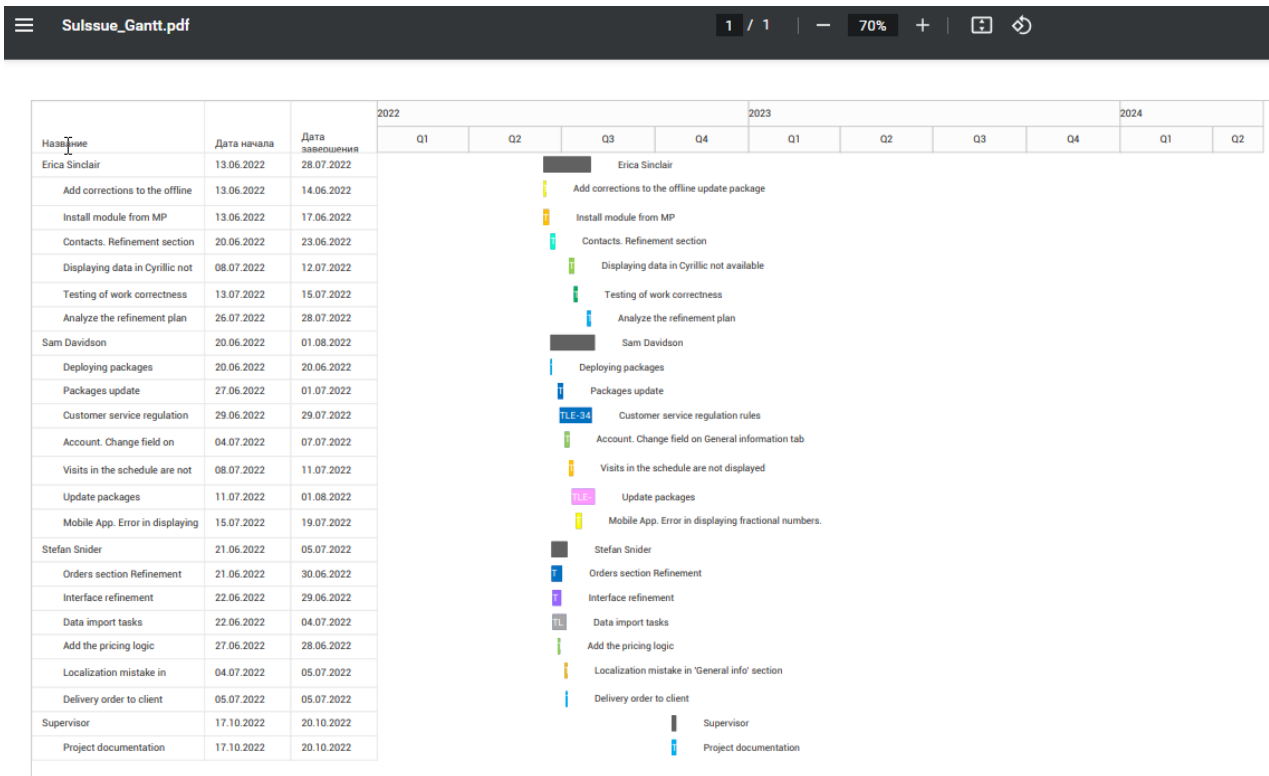
Picture 5.1.12

When exporting to a PDF file, the hierarchy and columns of the chart registry are unloaded, as well as the timeline with the blocks displayed on it.

To export a PDF file, you must click "PDF export" and specify the page orientation and size (Picture 5.1.13 и Picture 5.1.14)



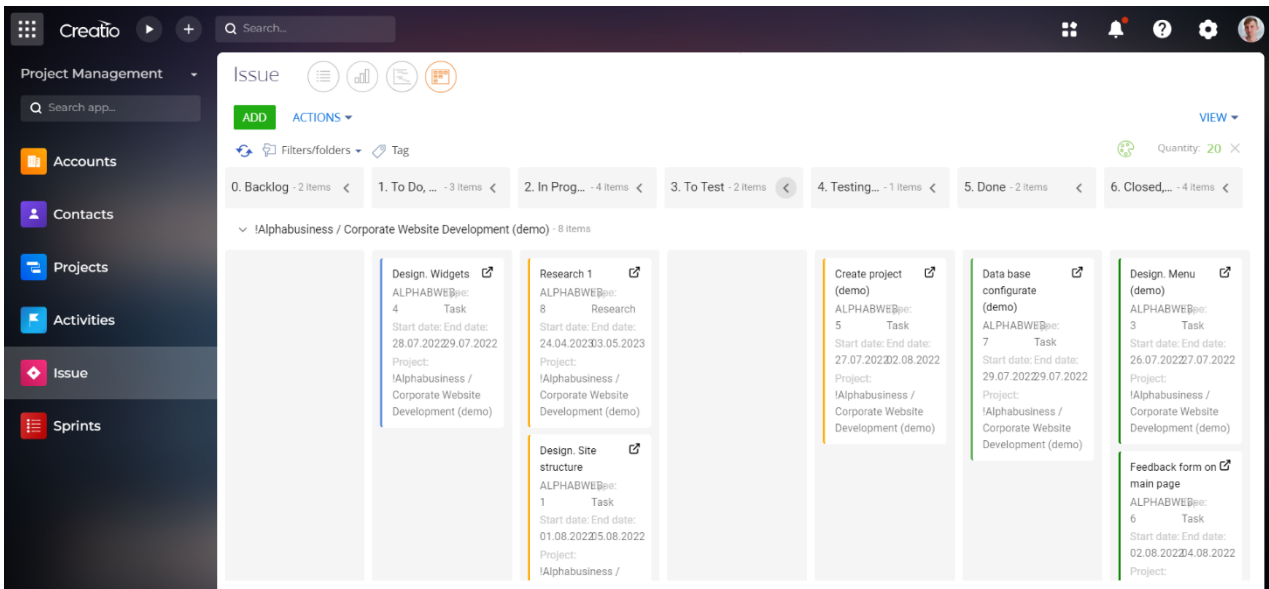
Picture 5.1.13



Picture 5.1.14

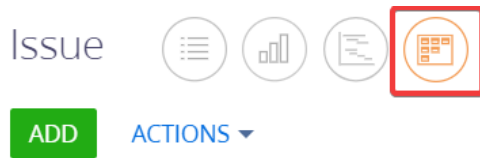
Kanban board

The **Kanban board add-on** (Picture № 5.1) is the project management tool that helps to visualize tasks, limit the amount of unfinished work and maximize efficiency (or speed).



Picture 5.1

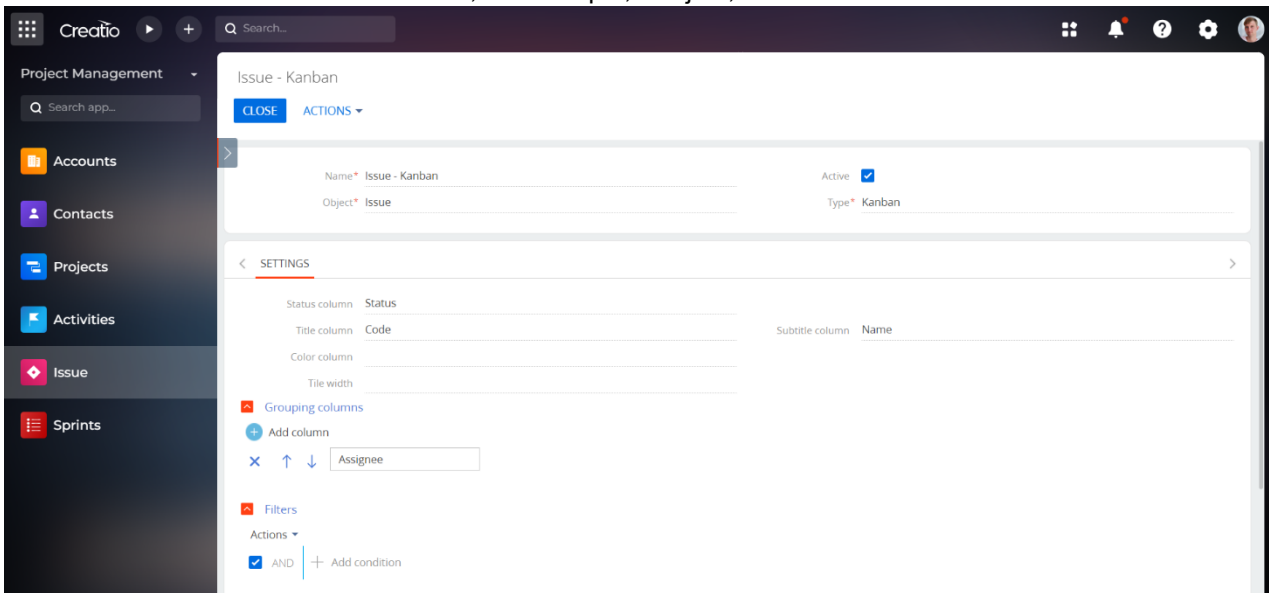
To display the Kanban board / in the Issue section, click on the board icon located in the upper left corner (Picture 5.2)



Picture 5.2

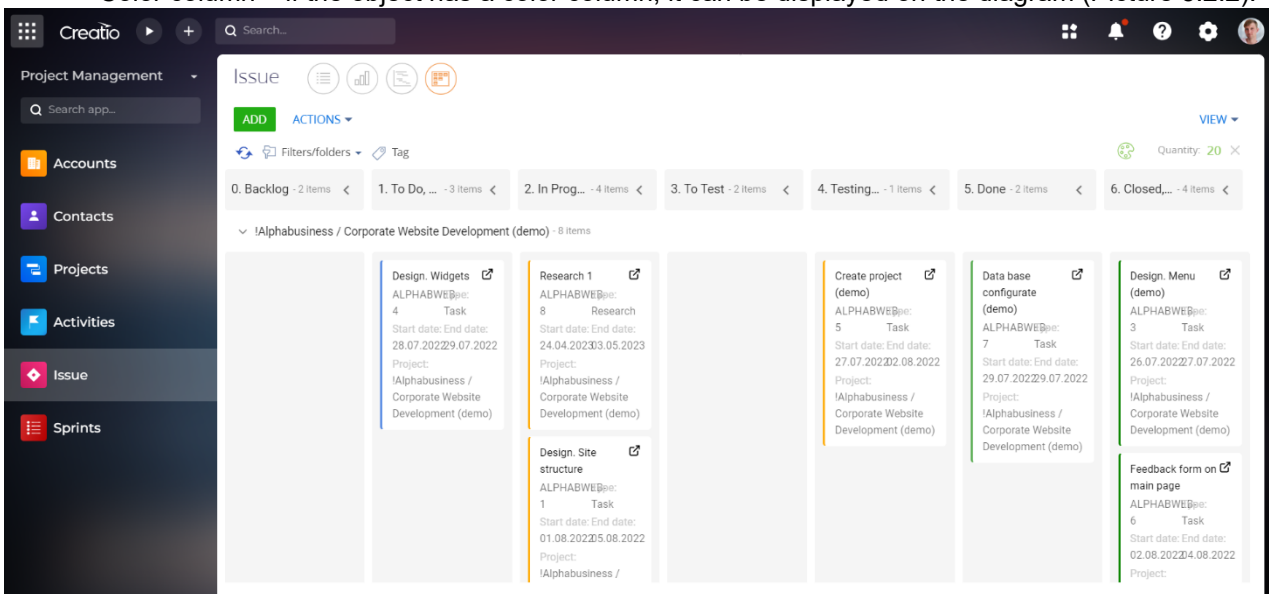
Kanban board settings are made for any section of the system that has a status bar or column with a status value.

- You need to fill in the fields (Picture 5.2.1):
- Status column – for example, the status of the Order;
- Title column – the name of the element, such as the Order number;
- Subtitle column – additional information, for example, Subject;




Picture 5.2.1

Color column – if the object has a color column, it can be displayed on the diagram (Picture 5.2.2).




Picture 5.2.2

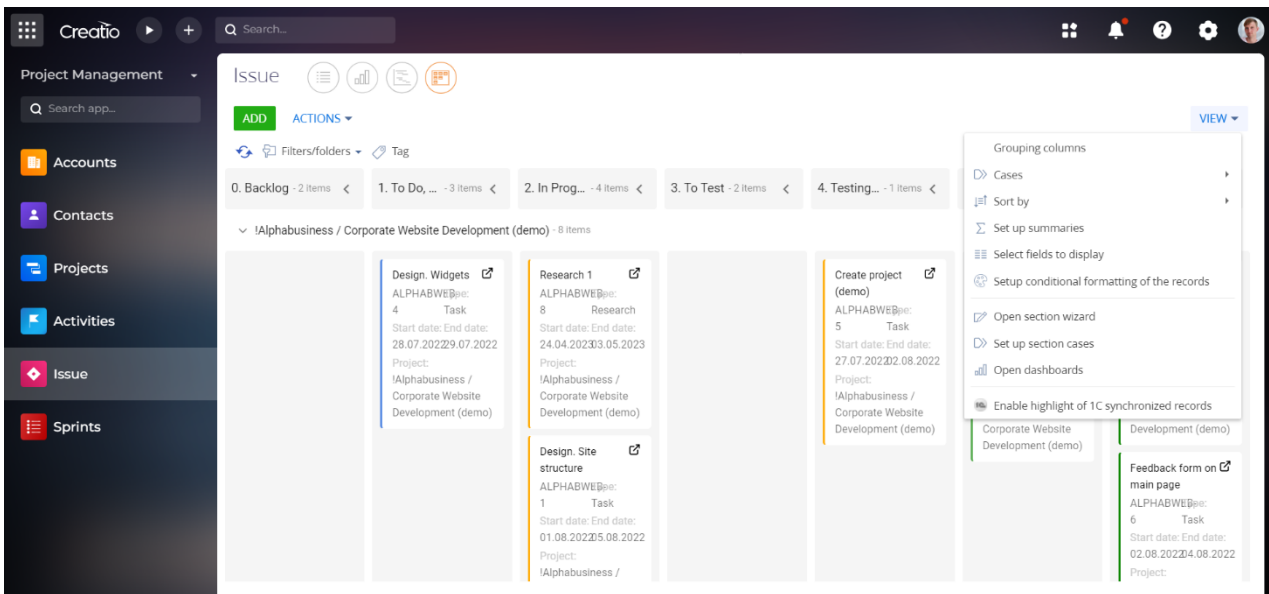
In the «Grouping columns» setting, you can set up the hierarchy for displaying records on the table.

To add a hierarchy level, click  **Add column**

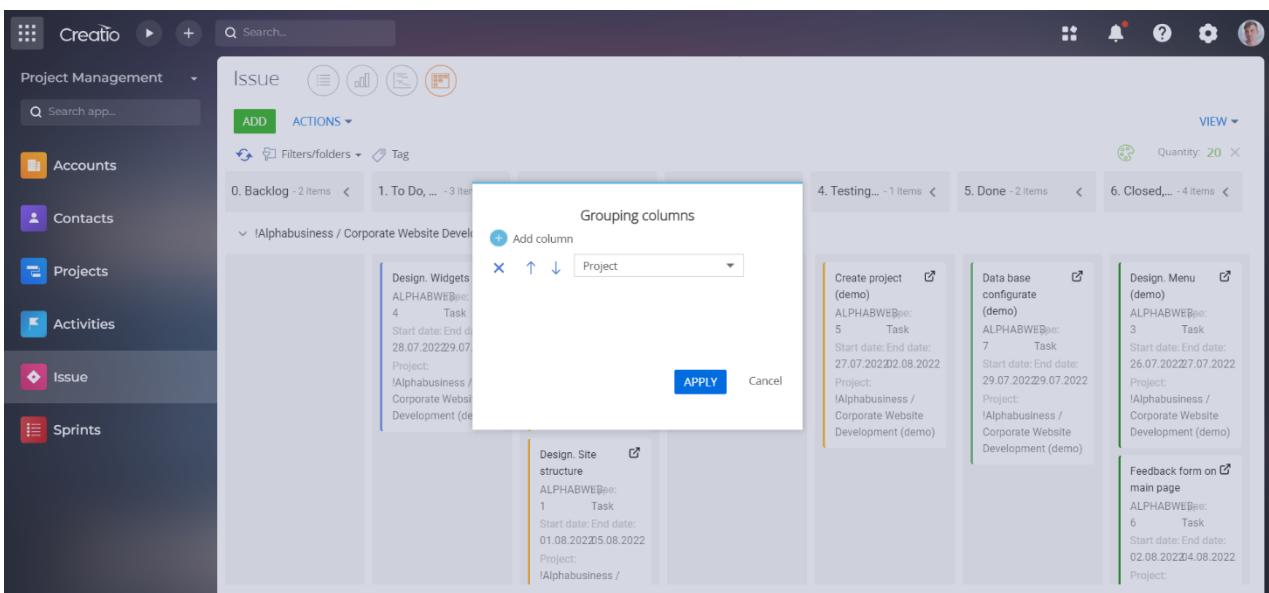
In the «Filters» setting, filters are set by which the record gets on the board.

To complete the setting, press 

The user can change the hierarchy on the Kanban board personally for himself, to do this, go to the Kanban board, open the "View" menu (Picture 5.2.3) and select «Grouping columns». (Picture 5.2.4) In this way, the user can change the hierarchy, which will take precedence over the general setting for a particular use.

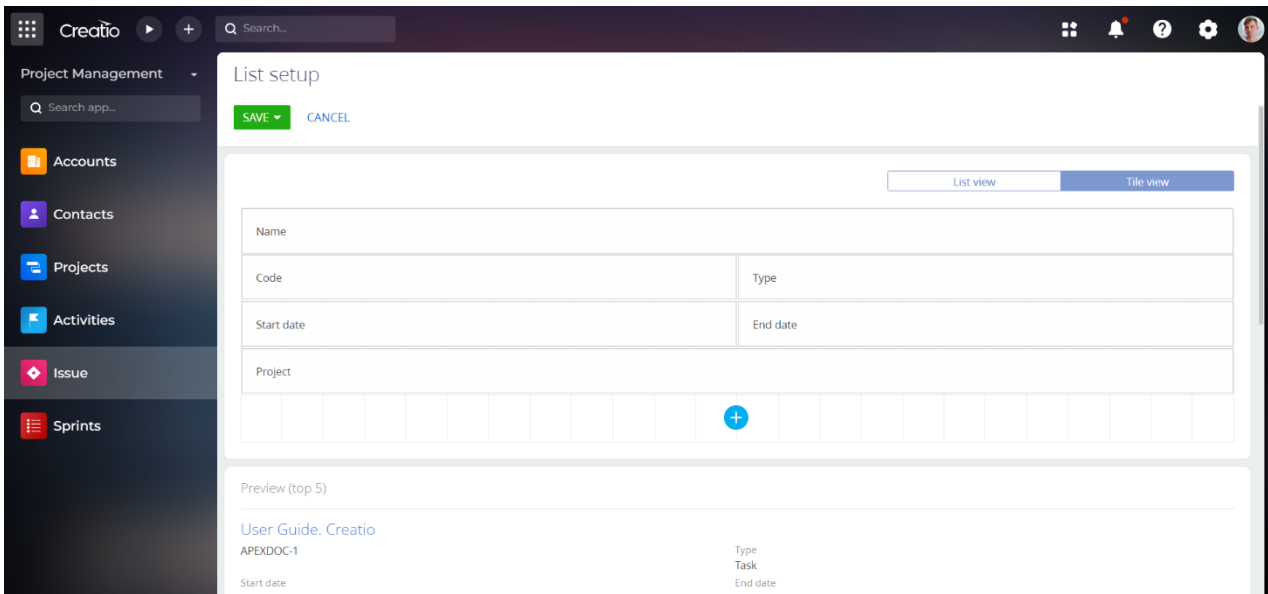


Picture 5.2.3



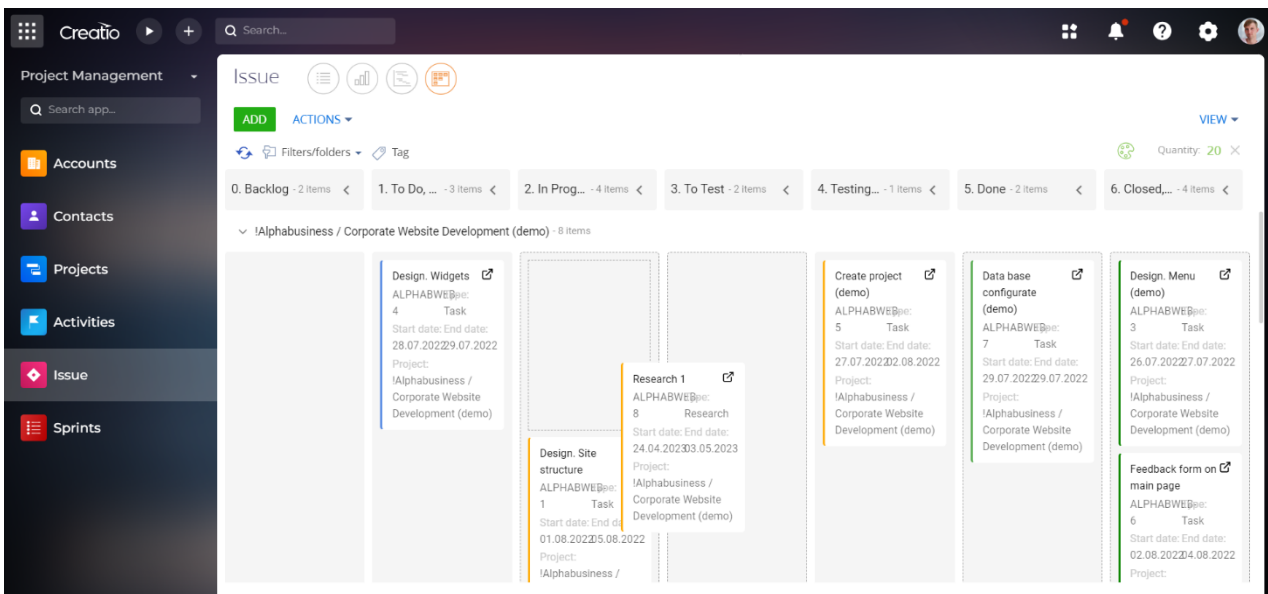
Picture 5.2.4

The user can add all the necessary information to the Kanban board block directly from the Kanban board view. To do this, go to the "View" menu and in the column settings for tiled display, add those columns that should be displayed on the Kanban board block (Picture 5.2.5).



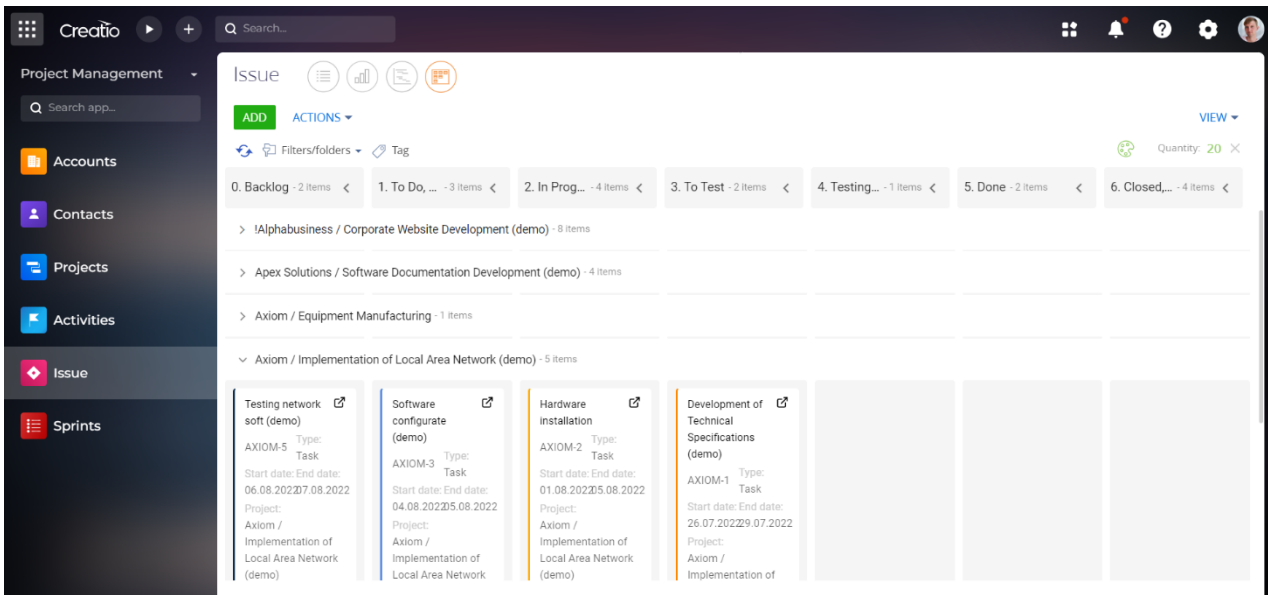
Picture 5.2.5

Using the Kanban board, the user can move blocks from one status to another, in accordance with the settings of the section cases, and after moving the block from one status to another (Picture 5.2.6), the status will change automatically on the section records.



Picture 5.2.6

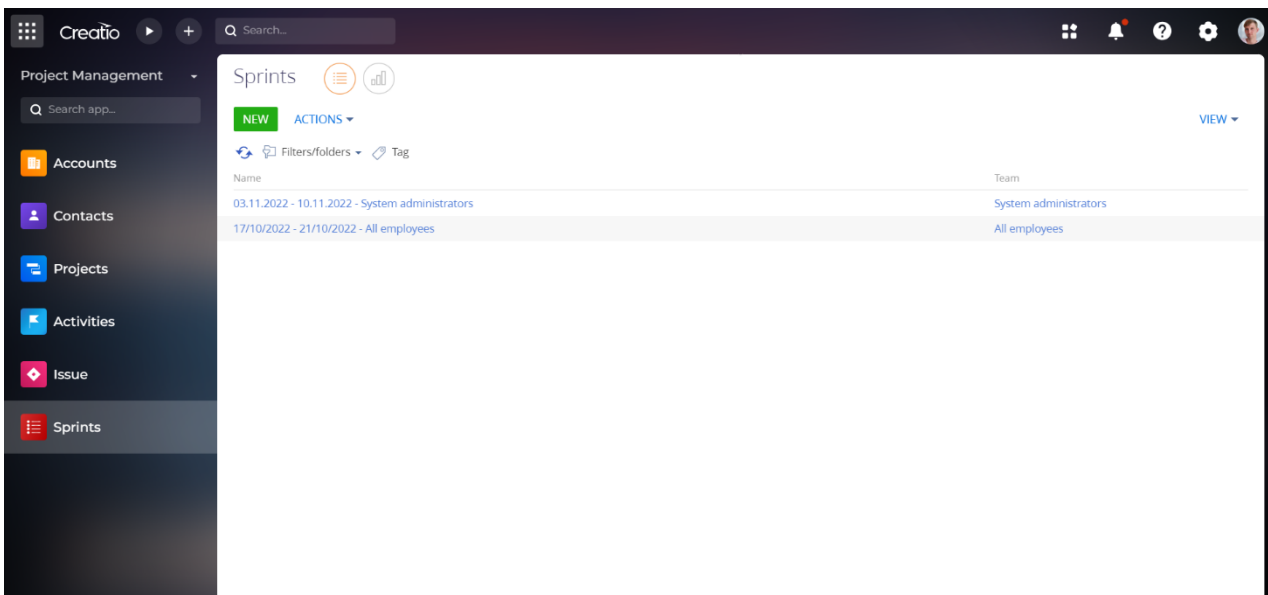
For the convenience of working with the diagram, the user can hide the levels and columns on the Kanban board (Picture 5.2.7).



Picture 5.2.7

Sprints setup

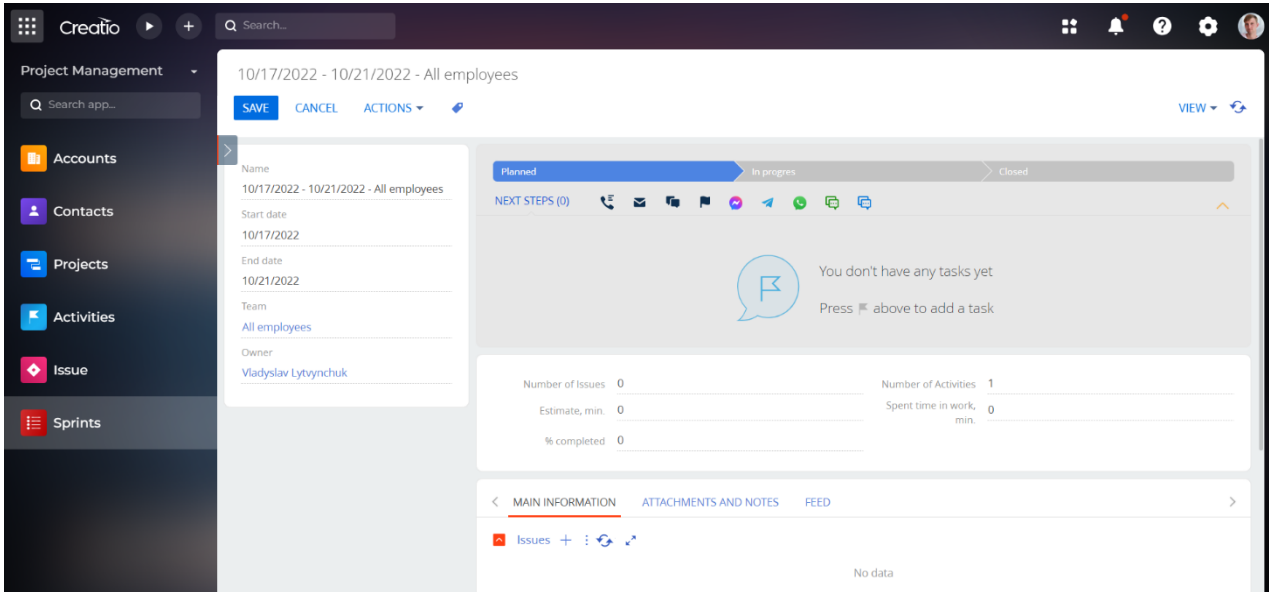
Activities, projects and tasks can be combined into a sprint. To do this, you need to create a sprint record in the Sprints section. To create a sprint record, click NEW (Picture 5.3.1):



Picture 5.3.1

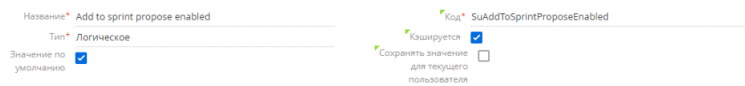
On the new record page it is enough to fill in the fields (Picture 5.3.2):

- Name – the name of the sprint;
- Start date – the start date of the sprint;
- End date – the end date of the sprint;
- Team – role or user;
- Owner – responsible for sprint.

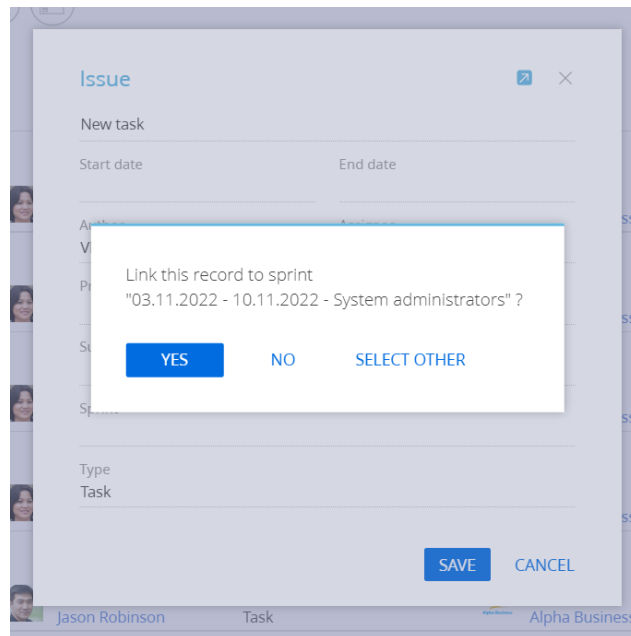


Picture 5.3.2

For convenience, it is recommended to enable the system setting:
Add to sprint label enabled (SuAddToSprintLabelEnabled) (Picture 5.3.2) – when creating an activity or a task, the system setting displays a suggestion to assign a record to a sprint (Picture 5.3.3):

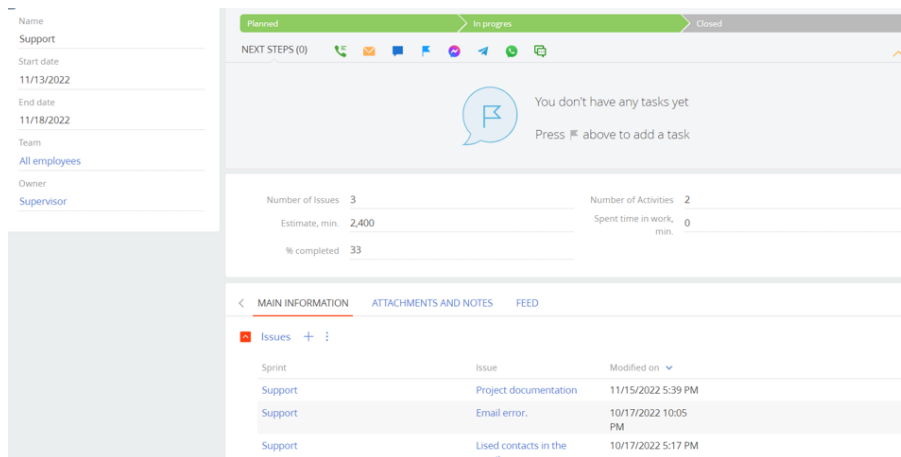


Picture 5.3.2



Picture 5.3.3

After clicking YES, the record will automatically be added to the Issues or Activity detail. A task or activity project will be automatically added to the Project detail (Picture 5.3.4). You cannot add a project to the Sprint manually, only when adding an activity or task.



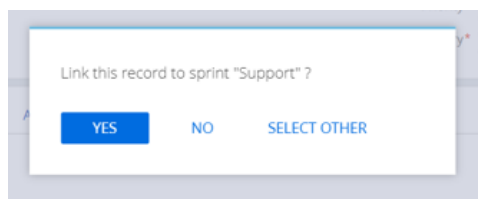
Picture 5.3.4

Add to sprint propose enabled (SuAddToSprintProposeEnabled)— system setting, if a task/activity was not linked to a sprint when created, displays an inscription suggesting linking a record to a sprint (Picture 5.3.5):

The current record not been added to the sprint. Add?

Picture 5.3.5

If you click on the record "The current record was not added to the sprint. Add?" you will be prompted to attach a record to the current sprint (Picture 5.3.6).



Picture 5.3.6

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