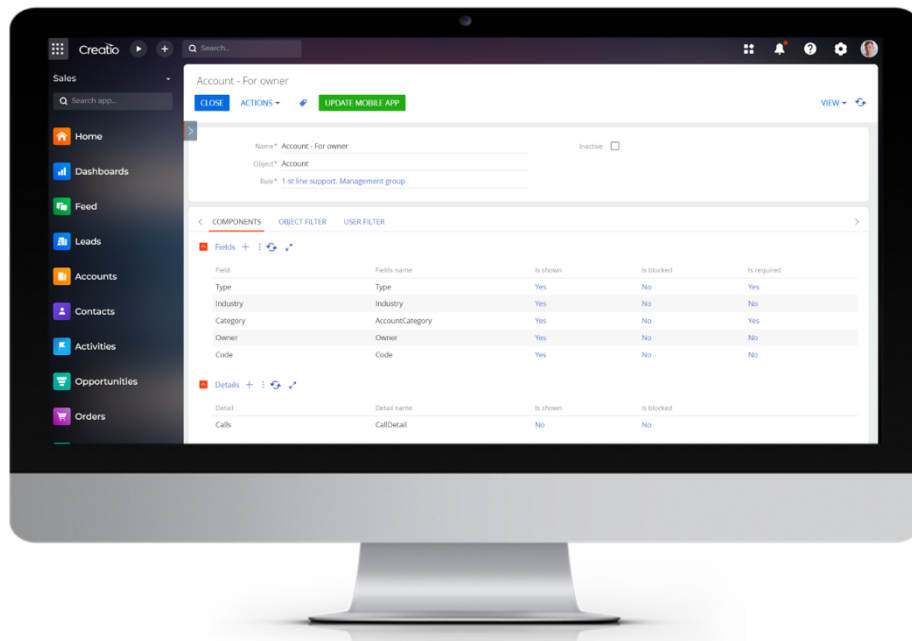




Role-based business rules for Creatio



Guide to setup and utilization

July 18, 2023

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Product description

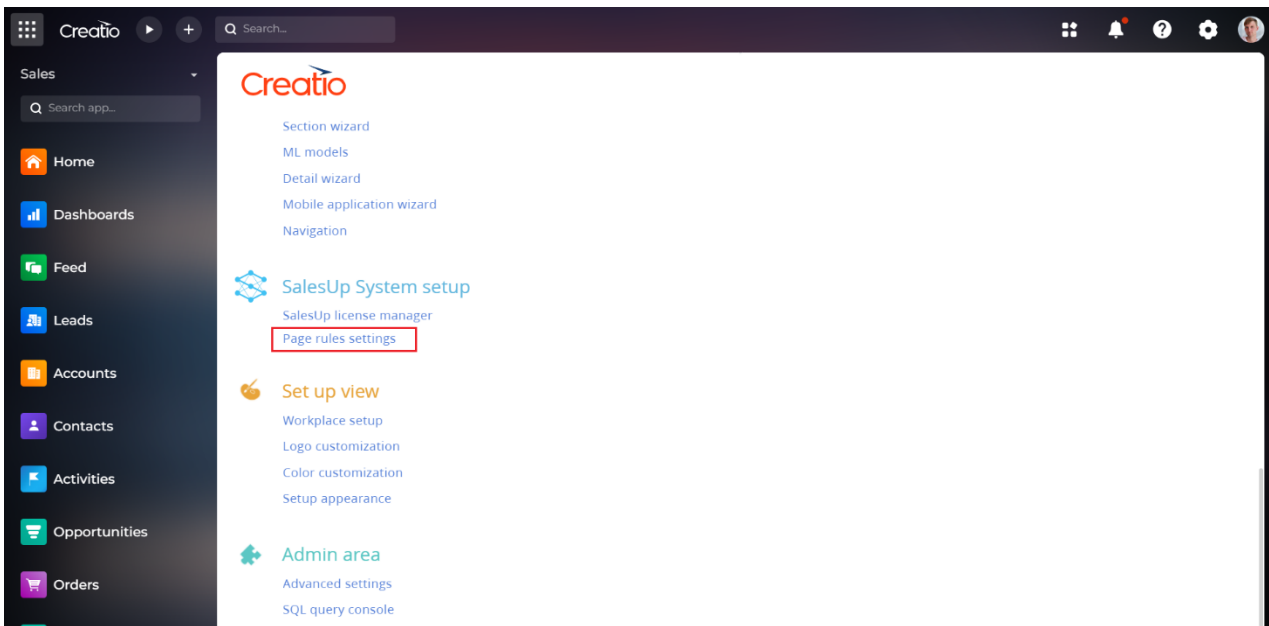
The "Sales'Up Role-based business rule for Creatio" product allows you to manage rules for any fields, details, tabs, field groups and Freedom elements of all Creatio system objects depending on the user's role, namely:

- Hide fields, details, tabs, field groups, Freedom object elements for some roles, and vice versa, display them for other roles.
- Assign the selected fields of the object the mark "required to fill" for the specified roles.
- Control the default field value.
- Control the number of selectable lookup values of the selected field for the specified role.
- Customize the display of fields, details, tabs, field groups and Freedom elements on the object page depending on its type, type, etc.

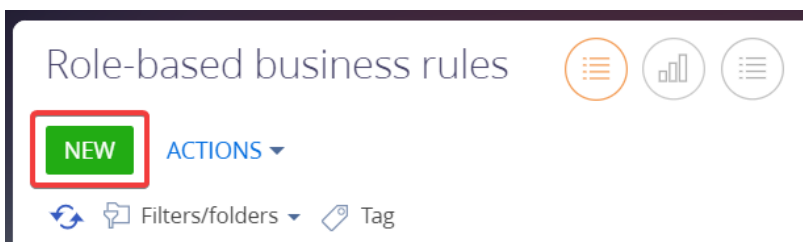
Product setup

Creating a new rule

In order to configure a new rule, go to the system designer and in the "System Settings" block, select the "Page Rules Settings" section.

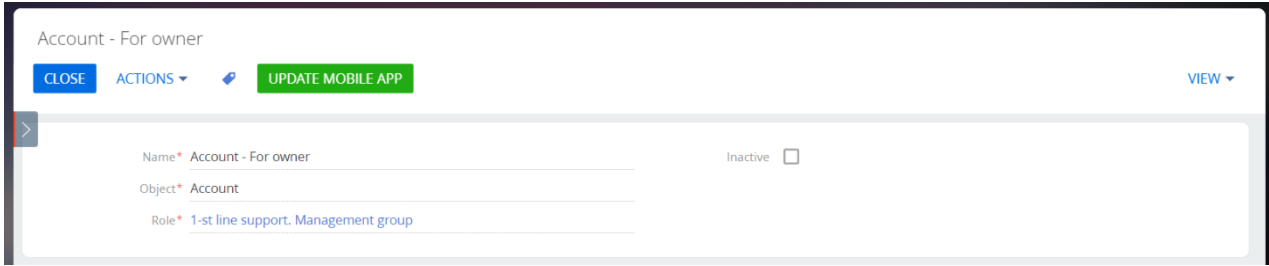


In the "Setting page rules" section, click the Add button



General information

On the page that opens, configure the rule parameters:



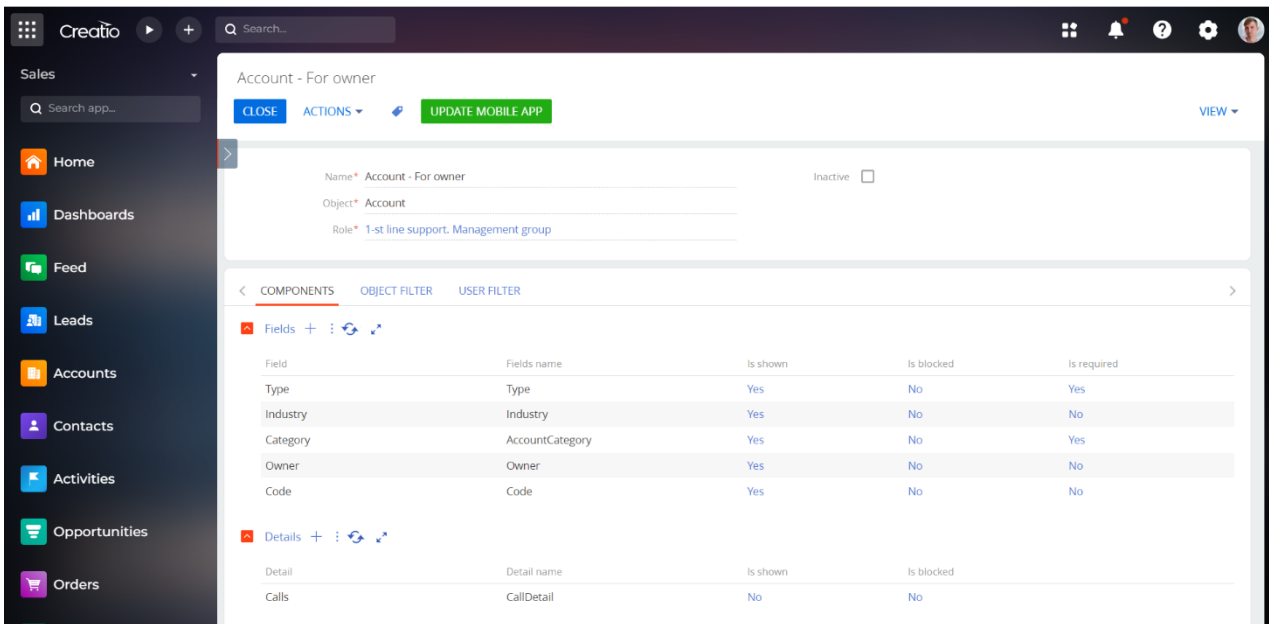
- Name – enter the name of the rule (pre-filled automatically, but can be edited)
- Object - select the system object on which the rule will be configured. Absolutely all system objects are available for selection.
- Role – Specify the role of the user for whom the rule will be applied (the field is optional).

Check box Inactive – If you want to disable the current rule.

Rules parameters setup

To configure the rule parameters, it is necessary to fill in the details of "Fields", "Details", "Tabs", "Freedom elements", "Field groups" on the "Components" tab, as well as configure advanced object and user filtering on the "Filter about "Object" and "User Filter".

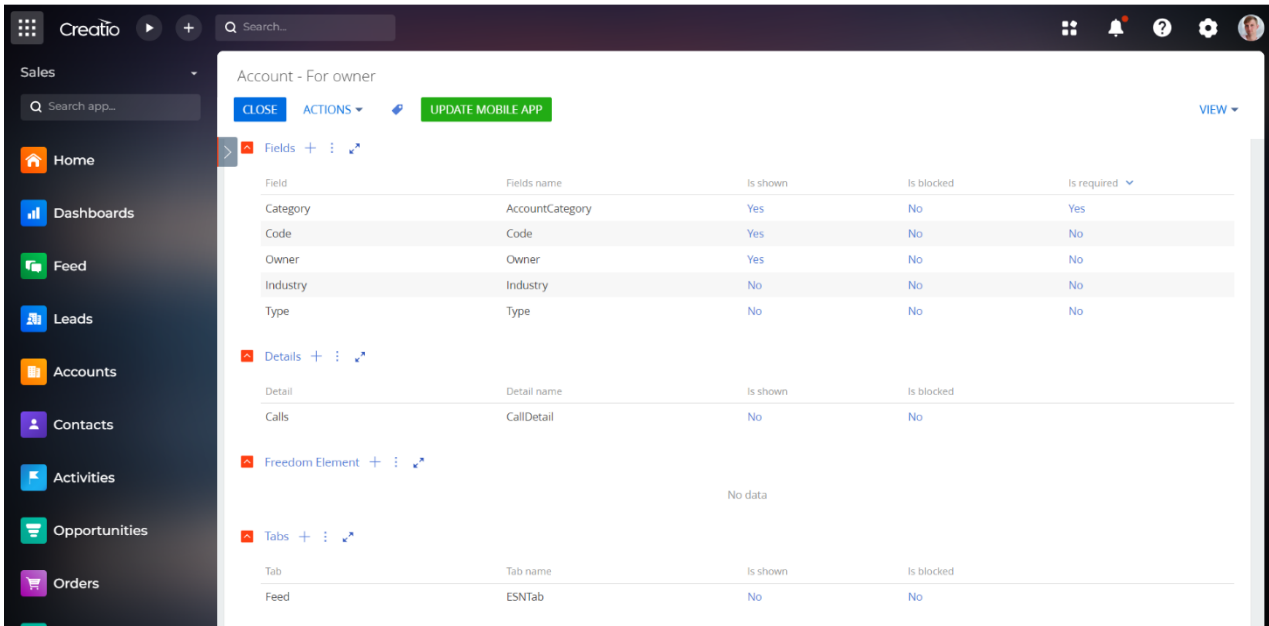
“Components” tab



Field	Fields name	Is shown	Is blocked	Is required
Type	Type	Yes	No	Yes
Industry	Industry	Yes	No	No
Category	AccountCategory	Yes	No	Yes
Owner	Owner	Yes	No	No
Code	Code	Yes	No	No

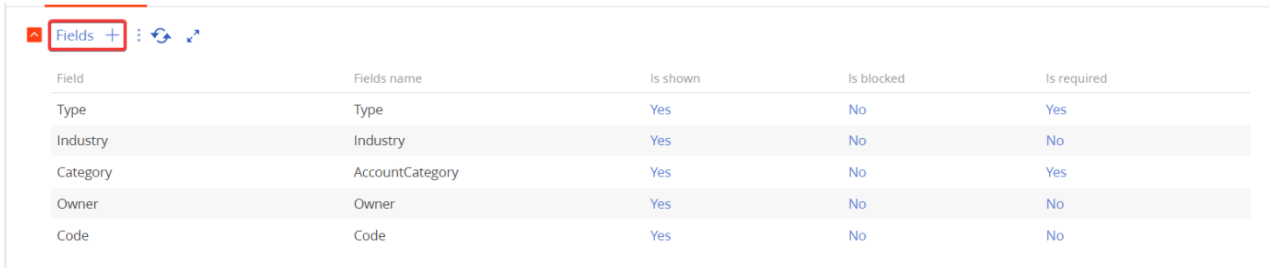
Detail	Detail name	Is shown	Is blocked
Calls	CallDetail	No	No

On the tab, the Fields, Details, Tabs, Field Groups and Freedom elements of the object page are available, by which the display parameters for the role will be configured:



“Fields” tab

Click on **+** to add field settings to the object. The system allows you to add settings to several object fields in the context of one rule.



Fill in the fields on the page.

Field* Address Is shown Required Is blocked

- Field - Select the field to be configured;
- Display – activate the check box if it is necessary for the field to be available;
- Mandatory - (available for selection when the "Display" check box is active) - activate the check box if you need to make the field mandatory;
- Locked - activate the check box if you want to make the field unavailable for editing.

If the field is a lookup, for example, Category, then the following parameters are available to configure such field:

Account - For owner / Field RPR

CLOSE ACTIONS ▾

Field* Category Is shown Required Is blocked

< ACCESSIBLE RECORDS >

Filter disabled

Accessible records + : Add all records ✓

Field RPR	Record caption	Default
Category	D	No
Category	C	No
Category	B	No
Category	A	No

The "Available records" detail is displayed when the "Display" check box is active. Entries to the "Available records" detail are added by clicking the "Add all records" button.

If any of the values need to be set as the default value, highlight the entry by clicking on it and change the "Default" value from "No" to "Yes":

Account - For owner / Field RPR

CLOSE ACTIONS ▾

Field* Category Is shown Required Is blocked

< ACCESSIBLE RECORDS >

Filter disabled

Accessible records + : Add all records ✓

Field RPR	Record caption	Default
Category	B	No
Category	A	Yes
Category	D	No
Category	C	No

- Filter disabled – activate the check box to not filter values from the lookup.
- Default value (available when the "Filter is disabled" check box is active) - specify the default value of the lookup.

SAVE CANCEL ACTIONS ▾

Field* Category Is shown Required Is blocked

< ACCESSIBLE RECORDS >

Filter disabled Default value A

Press **SAVE** to save the record.

“Details” detail

Click on **+** to add object detail settings. The system allows you to add settings of several details to the object in the context of one rule.

Details + : ↕

Detail	Detail name	Is shown	Is blocked
Calls	CallDetail	No	No

Fill in the following fields on the page:

Detail* Account communication options Is shown Is blocked

- a) a) Detail - specify the detail of the object to show/hide, for example, Documents
- b) b) Display – activate the check box if the item should be available;
- c) c) Locked - activate the check box if you want to make the detail unavailable for editing.

Press **SAVE** to save the record.

Freedom elements” detail

Click on **+** to add the Freedom settings of the object elements. The system allows you to add settings of several Freedom elements to an object in the context of one rule.

Freedom Element + : ↕

RPR	Is shown	Is blocked	Element Name
Account - For owner	No	No	LeftFilterContainer

Fill in the fields on the page:

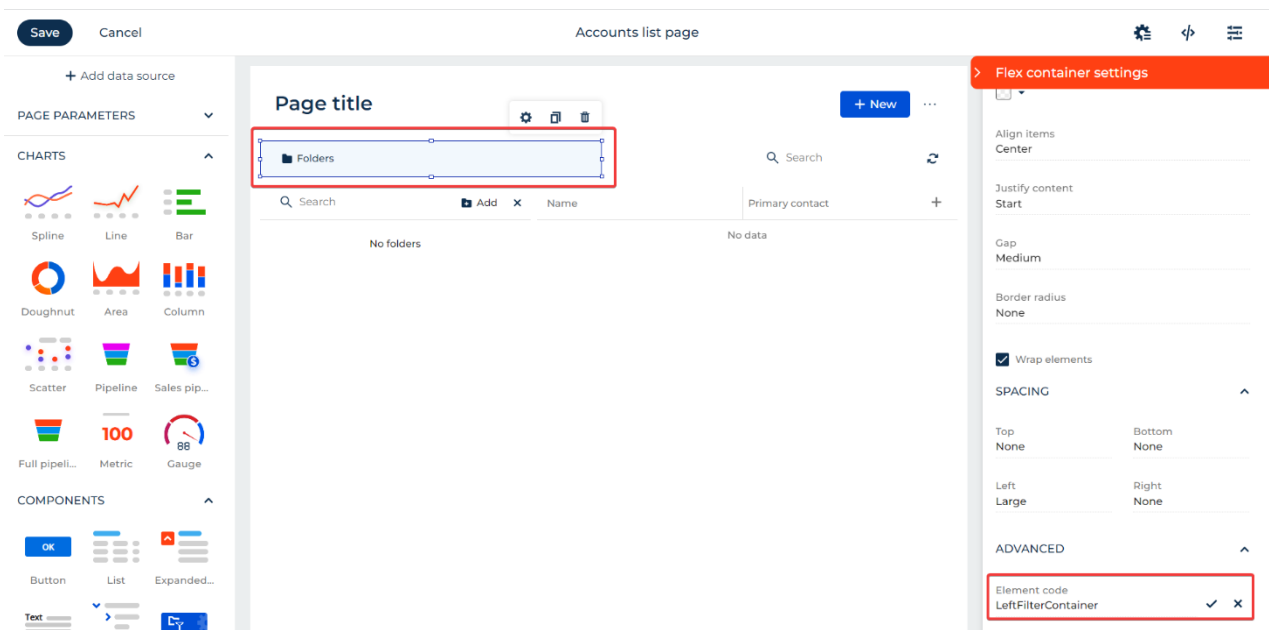
- a) Freedom element – specify the code name of the element to display/hide;
- b) Item Name – Duplicate the Freedom code name of the item from the previous step.
- c) Display – activate the check box if the element should be available;
- d) Locked - activate the check box if you want to make the element unavailable for editing.

Freedom Element* LeftFilterContainer	Element Name* LeftFilterContainer	Is blocked <input type="checkbox"/>	Is shown <input type="checkbox"/>
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Note: The element code in the "Freedom element" and "Element name" fields must be identical to the Freedom element code, with no spaces before or after the characters.

In order to correctly specify the element code, go to the page setup designer, select the element required to configure the rule and copy the value of the "element code" field on the right side of the page.

For example, to hide the folder for the role in the lookup of the Accounts section, go to the page settings designer in the Accounts section,



Select the "Folders" item and copy the code of the item that will be used in the rule setup.

Detailed information on working with Freedom UI designer can be found at [Creatio Academy](https://creatio.com/academy).

“Tabs” detail

Click on **+** to add object tab settings. The system allows you to add the settings of several tabs to the object in the context of one rule.



RPR	Tab name	Tab	Is shown
Accounts	RelationshipTabContainer	Connected to	No

Fill in the fields on the page:

Tab* Connected to

Is shown

Is blocked

- Tab – specify the tab of the object to display/hide records, for example, Interconnections;
- Display – activate the check box if the tab should be available;
- Locked - activate the check box if you want to make the tab unavailable for editing.

Press **SAVE** to save the record.

“Field groups” detail

Click on **+** to add object field group settings. The system allows you to add settings for several groups of object fields in the context of one rule.

Field groups + :

RPR	Fields group name	Fields group	Is shown
Accounts	CommonControlGroup	Group without title CommonControlGroup	No

Fill in the fields:

Fields group* Group without title CommonControlGroup

Is shown

Is blocked

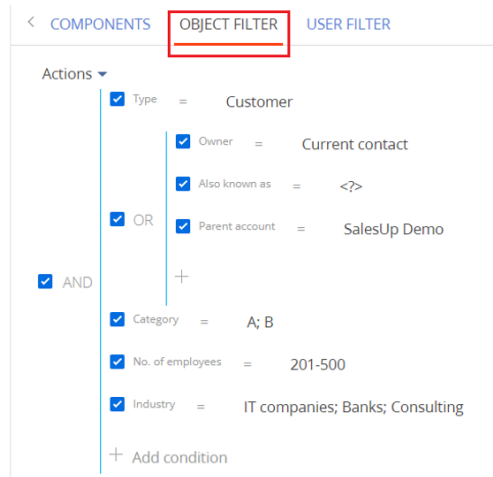
- Field group – specify a group of object fields to display/hide records, for example, Group without title;
- Display – activate the check box if the group of fields should be available;
- Blocked - activate the check box if you want to make a group of fields unavailable for editing.

Press **SAVE** to save the record.

“Object filter” tab

The tab is intended for filtering the object for which the rule is created.

The tab presents the standard advanced filtering settings. The tool allows you to set conditions for filtering records, according to which the rule will be applied.



For example, depending on the type of counterparty. If the counterparty has a Client type, then the rule will be applied only to such counterparties.

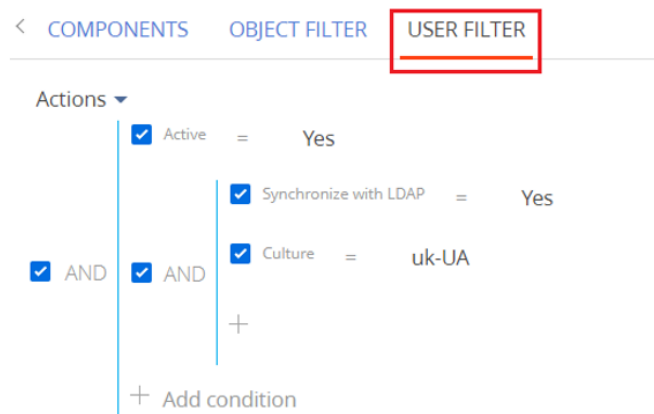
Also, the system allows you to compare filtering values for the current user. For example, a counterparty may have several people responsible for a direction. If the current user who opens the counterparty card is indicated on the details as responsible for the direction, then such a card will be displayed without restrictions on access to fields and details. If the current user is not responsible for the direction, then access to the fields and details of the object will be limited for him.

Note - if none of the users responsible for the direction is indicated on the details, then access to the details and fields will not be restricted.

“User Filter” tab

The tab is intended to filter the user to whom this rule will apply.

The tab presents the standard advanced filtering settings. The tool allows you to set filter conditions for records, according to which the rules will be applied.



Saving the configurations

To save page rules, click the button **SAVE** on the toolbar.


Note: you can save the rule after filling in the mandatory fields.

Viewing, copying and deleting of rules

In the register of the "Page rule settings" section, when selecting a rule, the user can take such actions as open, copy, delete a record.



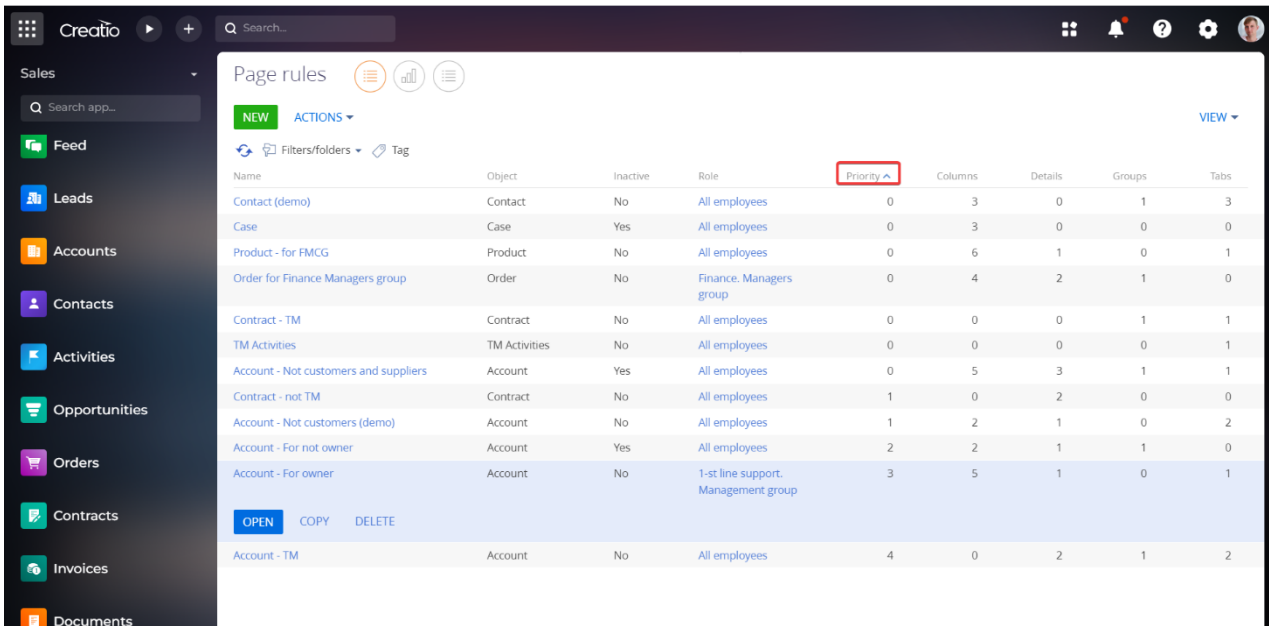
When copying, an identical record is created with all selected details, fields filled and filters set.

Make the necessary changes for the new rule and save the entry by clicking the button .

To delete a record, just select the required record and click the "Delete" button.

Settings priority

If there are two or more rules in the page rule settings, you can prioritize the execution of these rules. For this purpose, there is a Priority column in the register of rules of the page, and you can use the arrows to move the rules to the desired position.



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