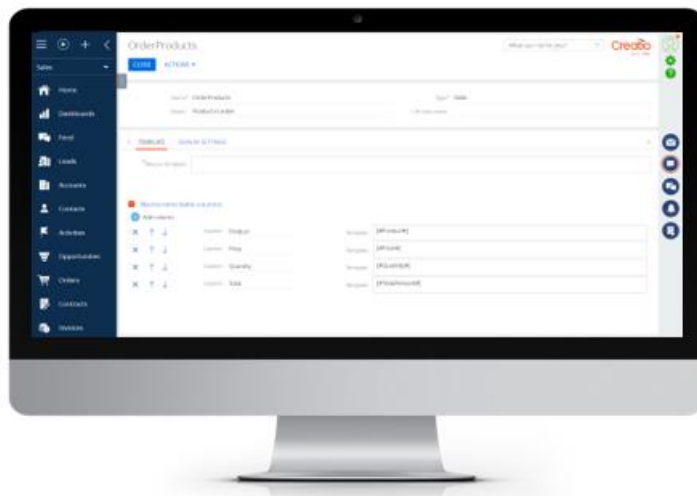




ENHANCED TEMPLATE MACROS FOR CREATIO



Guide to setup and utilization

19.08.2022

Product description

The **Template Macros for Creatio** product is a solution that allows you to dynamically set up complex macros for use in message templates. The module allows, in addition to standard macros and object columns, to paste sample values, lists, tables, priorities and other types of macros. Configuration is performed in a separate convenient setup wizard.

Products:

Product	Price	Quantity	Total
DELL Vostro 5510 (N7500CVN5510_WP)	2300,00	4,000	9200,00
Motherboard UT165LZ-32P1	900,00	1,000	900,00
Windows 11pro (W7509876549)	300,00	4,000	1200,00

The product can be used by companies of any industry or business area, since it offers universal functionality that does not depend on the business area and the system objects used.

Use cases

- Sending information on the order to the client after confirmation and completing;
- Display the amount or number of records per detail (e.g. products in an order);
- Display a list of order/invoice products as a bulleted list;
- Display order products in the form of a table with additional object columns;
- Sending a report on the status of open requests;
- Informing managers about their accounts with receivables;
- Sending reporting summary notification for the period;

Opportunities

- Adding an unlimited number of macros;
- Display of aggregated data from the record detail;
- Display of detail records in the form of a list (marked or numbered);
- Display of detail records in the form of a table;
- Ability to use other macros in a macro template (recursion);

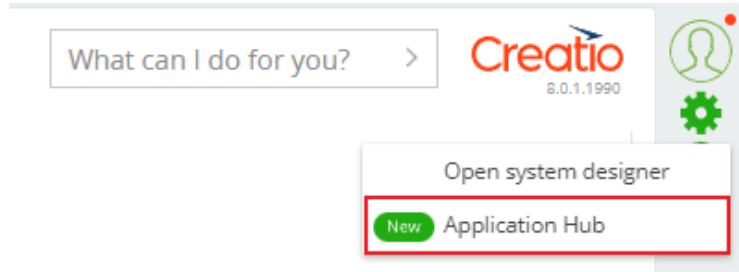
Technical requirements

The product is compatible with all products on the Creatio platform version 7.16.0 and higher.

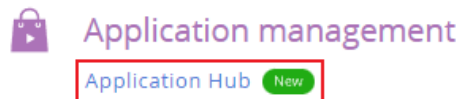
Product installation and setup

Product installation

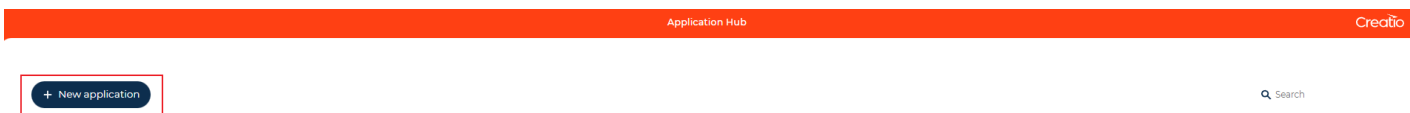
To install the packages, press  and go to the Application hub



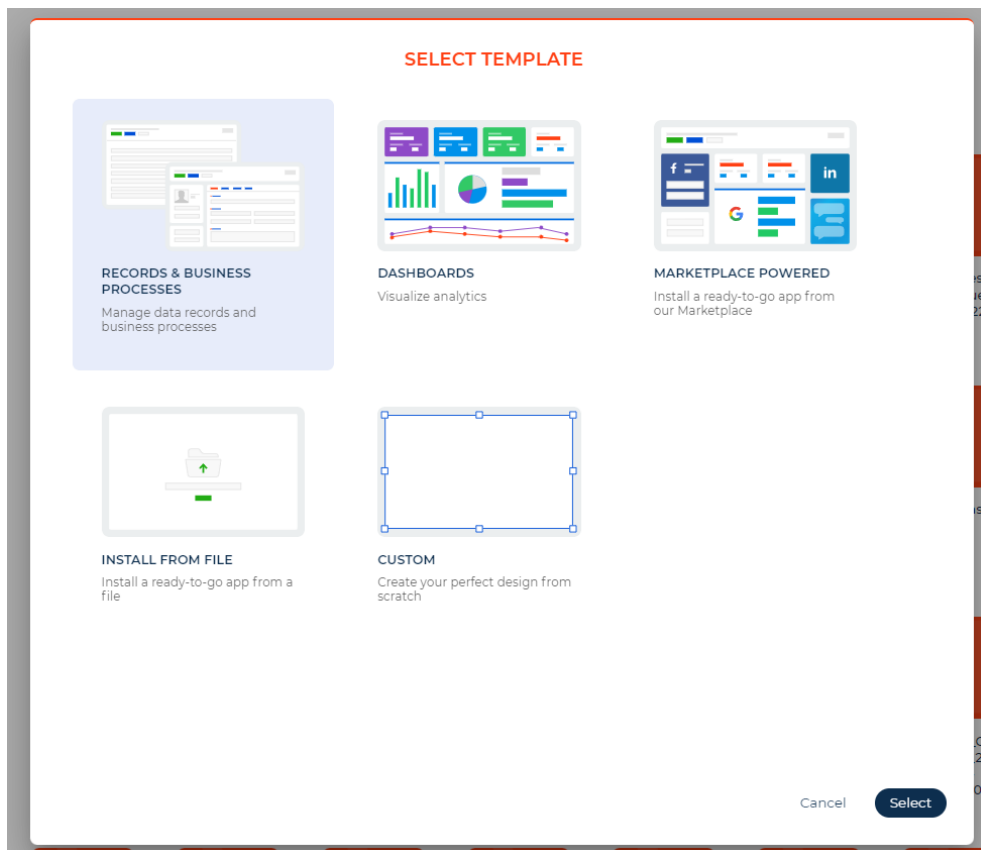
Alternatively, you can go to the Application hub via System designer.



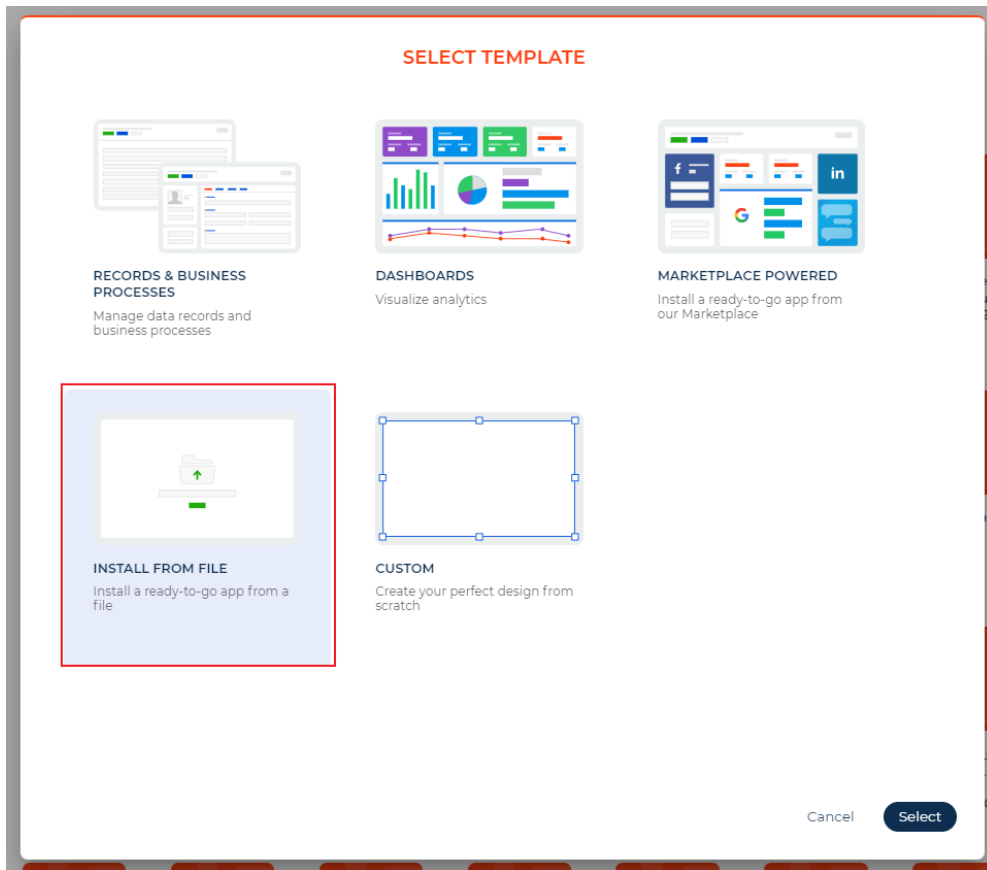
On the Application hub page, click on 'New application' button,



Choose the 'Install from Marketplace' block and press the Select button.



If you are installing a product package from a file, on the Application hub page, click "New Application" and select "Install from file", specify the path to the archive with the package and complete the installation.



General settings

Creation of a new macro

To add a new macro setting:

Go to the "System Designer" section;

Select "Macros settings";



System setup

Languages

Translation

Lookups

System settings

Report setup

Section wizard

ML models

Detail wizard

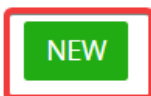
Mobile application wizard

SalesUp license manager

Macros settings

Press «New»;

Macros settings



ACTIONS ▾

Filters/folders ▾

Name

Product selection

OrderProducts

AccountPeriodOrders

ProdInOrder

In the record card, you must fill in all the required fields:

- *Name* – the name of the macro that will be inserted into the message template. It must be a unique name;
- *Type* – macro type;

Additional settings:

- *Object* – the object from which the data will be taken when forming the macro value;
- *Filter* – an advanced filter that will be applied to the records of the object when forming the macro value;
 - In the filter, you can use a comparison with the value of another column (for example: the actual order amount is greater than the planned order amount);
 - In the filter, you can use a comparison with a macro parameter, that is, the value of the macro source on which the message is generated (for example, when sending Email for an order, the parameter will contain the order ID);

- *Macro template* – macro template, based on which the macro value will be displayed;
 - Insert `[@MacrosValue@]` instead of the macro value, or the value will be appended to the end of the template

All other fields depend on the macro type.

Editing an existing macro

To edit the macro settings, you must use the standard functionality of editing system objects.

Macro settings

Selection

It is necessary to fill in the field "Aggregating function", if necessary, "Column", "Sorting column" and "Sort order".

- Count – the number of records from the selected object, taking into account the configured filter (the number of products in the order);

OrderProducts

SAVE CANCEL ACTIONS ▾

Name* OrderProducts Type* Selection
Object Product in order C# class name

< **TEMPLATE** DISPLAY SETTINGS >

Selection

Aggregation function Count

Actions ▾

Order = Macros parameter

AND + Add condition

- Sum, Minimum, Maximum, Average - aggregated function for the selected column of records from the selected object, taking into account the configured filter (sum for the column Total products in the order);

OrderProducts

SAVE CANCEL ACTIONS ▾

Name* OrderProducts Type* Selection
Object Product in order C# class name

< **TEMPLATE** DISPLAY SETTINGS >

Selection

Aggregation function Summ
Column* Total

Actions ▾

Order = Macros parameter

AND + Add condition

- Top 1 – the value of the selected column of the first record of the selected object, taking into account the set up filter and configured sorting (the value of the Total most expensive column (sorted in descending order by the Price column) of the product in the order);

OrderProducts What can I do for you? > Creatio
8.0.1.1990

SAVE CANCEL ACTIONS ▾

Name* OrderProducts Type* Selection

Object Product in order C# class name

< **TEMPLATE** DISPLAY SETTINGS >

Selection

Aggregation function Top 1 Order column* Price

Column* Total Order direction* 0

Actions ▾


Order = Macros parameter

AND + Add condition

List, Bulleted List, Numbered List

The records of the selection are displayed, taking into account the filtering, in the form of a list of the selected type.

You need to set up the Element Template. That is, the template by which each element of the selection in the list will be displayed. The template has the ability to use macros: object columns, standard, or other macros configured by this module. For the "List" type, you must specify the "Element Separator", that is, the string through which the elements will be connected, for example, a comma, semicolon, or line transfer.

OrderProducts What can I do for you? > 


SAVE CANCEL ACTIONS ▾

Name* OrderProducts Type* List
Object Product in order C# class name

< **TEMPLATE** DISPLAY SETTINGS >

Macros template	
Item template	{[#Product#] [#Quantity#]}
Items separator	


It is also possible to specify the sorting options for the selection.

OrderProducts What can I do for you? > 

SAVE CANCEL ACTIONS ▾

Name* OrderProducts Type* List
Object Product in order C# class name

< **TEMPLATE** **DISPLAY SETTINGS** >

 Selection

Order column Name
Order direction 0


Actions ▾

- Order = Macros parameter
- AND
- + Add condition

Table

The records of the selection are displayed, taking into account the filtering, in the form of a table with arbitrary pre-configured columns.

You need to customize the table columns by specifying the column order, headings, and cell templates. The template has the ability to use macros: object columns, standard, or other macros configured by this module.

OrderProducts What can I do for you? > 

CLOSE ACTIONS ▾

Name* OrderProducts Type* Table

Object Product in order C# class name

< TEMPLATE DISPLAY SETTINGS >

Macros template

✖ Macros items (table columns)

+ Add column


✖ ↑ ↓	Caption <u>Product</u>	Template <input type="text" value="[#Product#]"/>
✖ ↑ ↓	Caption <u>Price</u>	Template <input type="text" value="[#Price#]"/>
✖ ↑ ↓	Caption <u>Quantity</u>	Template <input type="text" value="[#Quantity#]"/>
✖ ↑ ↓	Caption <u>Total</u>	Template <input type="text" value="[#TotalAmount#]"/>

Priority

The first populated value from the macro source record is displayed.

(order customer - contact, and if the contact is not filled, then the account)

It is necessary to fill in element templates taking into account the position (priority).

OrderClient What can I do for you? > 


CLOSE ACTIONS ▾


Name* OrderClient Type* Priority







Object Order C# class name

< **TEMPLATE** DISPLAY SETTINGS >

Macros template

 Macros items (table columns)

 Add column

  	Template	<input type="text" value="[#Contact#]"/>
  	Template	<input type="text" value="[#Account#]"/>

Code

You must specify "C# Class Name" and create a class in source code with a custom macro implementation.

The screenshot shows the configuration form for 'OrderInfo'. At the top right, there is a search bar with the text 'What can I do for you?' and the 'Creatio 8.0.1.1990' logo. Below the title 'OrderInfo', there are buttons for 'CLOSE' and 'ACTIONS'. The main form area contains two rows of input fields: 'Name' with the value 'OrderInfo' and 'Type' with the value 'Code'. Below these, there is a 'C# class name' field with the value 'Terrasoft.Configuration.SuOrderInfoSalesUpMacros'. At the bottom of the form, there are navigation buttons for 'TEMPLATE' and 'DISPLAY SETTINGS'.

You can also specify the "C# class name" setting in any other types where you need to convert the macro result. In this case, the standard macro logic will also work, but it is possible to correct it in your code, too.

For example, selecting the order date, but specifying a class that will make a string with the name of the day of the week (Monday, Tuesday ...) from the date value.

The screenshot shows the configuration form for 'OrderDataDayOfWeek'. At the top right, there is a search bar with the text 'What can I do for you?' and the 'Creatio 8.0.1.1990' logo. Below the title 'OrderDataDayOfWeek', there are buttons for 'SAVE', 'CANCEL', and 'ACTIONS'. The main form area contains two rows of input fields: 'Name' with the value 'OrderDataDayOfWeek' and 'Type' with the value 'Selection'. Below these, there are 'Object' with the value 'Order' and 'C# class name' with the value 'Terrasoft.Configuration.SuOrderInfoSalesUpMacros'. At the bottom of the form, there are navigation buttons for 'TEMPLATE' and 'DISPLAY SETTINGS'. Below the navigation buttons, there is a section titled 'Selection' with a red 'x' icon. This section contains four input fields: 'Aggregation function' with the value 'Top 1', 'Order column' with the value 'Date', 'Column' with the value 'Date', and 'Order direction' with the value '0'. Below the 'Selection' section, there is an 'Actions' section with a dropdown arrow. It contains two checked items: 'Id = Macros parameter' and 'AND'. Below these items, there is a '+ Add condition' button.

Localization

To set up localized macro templates, you need to select "Localizations" in the actions of the editing page. The localization settings page will open similarly to setting up multilingual message templates, where you can set up different templates on different tabs.

OrderProducts What can I do for you? > **Creatio**
8.0.1.1990

CLOSE ACTIONS ▾

Localizations

Name* OrderProducts Type* Table
Object Product in order C# class name

< **TEMPLATE** DISPLAY SETTINGS >

Macros template

Macros items (table columns)

+ Add column

×	↑ ↓	Caption Product	Template [#Product#]
×	↑ ↓	Caption Price	Template [#Price#]
×	↑ ↓	Caption Quantity	Template [#Quantity#]
×	↑ ↓	Caption Total	Template [#TotalAmount#]

OrderProducts What can I do for you? > **Creatio**
8.0.1.1990

CLOSE ACTIONS ▾

Name* OrderProducts Type* Table
Object Product in order

< **ENGLISH (UNITED STATES)** > ⚙

Macros template

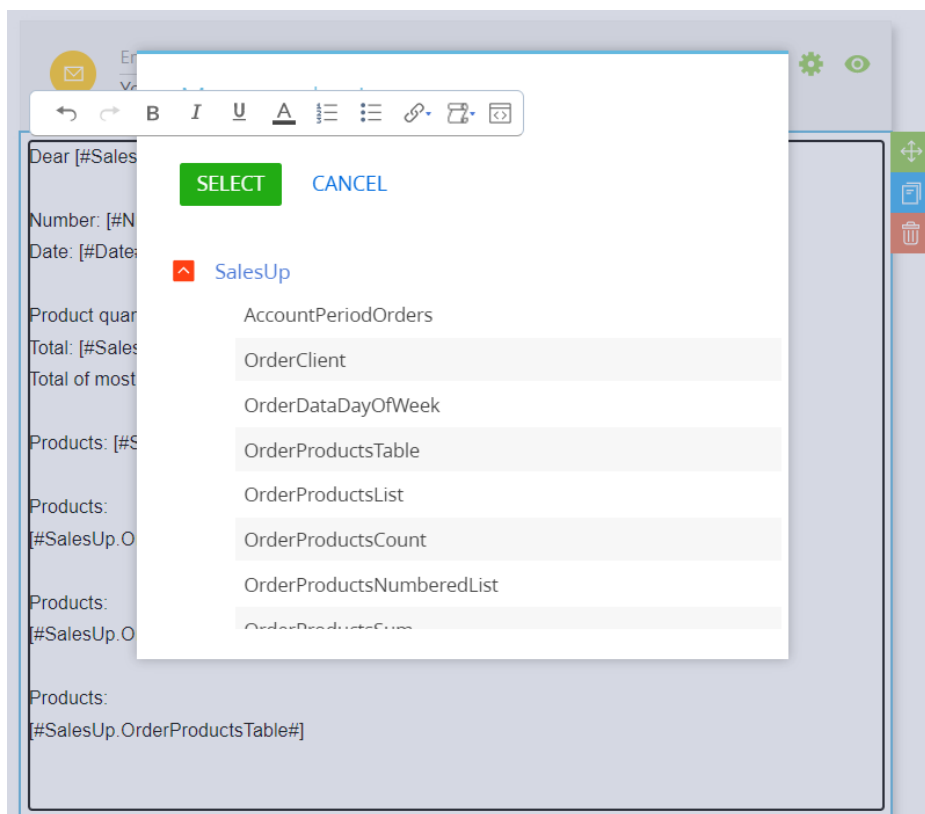
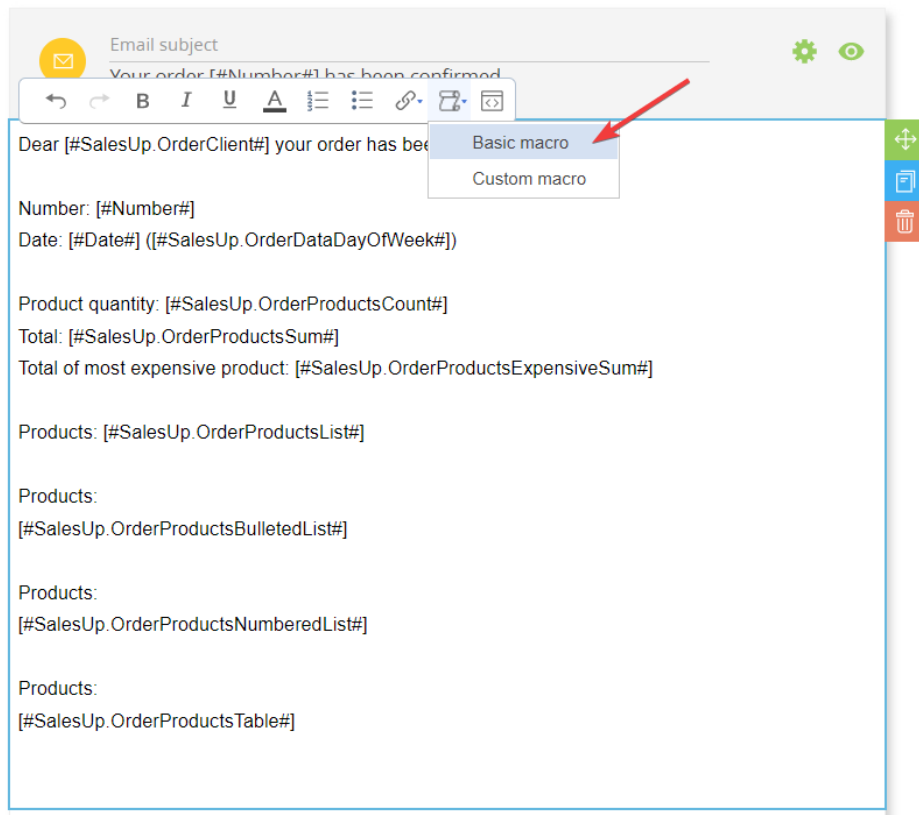
Macros items (table columns)

+ Add column

×	↑ ↓	Caption Product	Template [#Product#]
×	↑ ↓	Caption Price	Template [#Price#]
×	↑ ↓	Caption Quantity	Template [#Quantity#]
×	↑ ↓	Caption Total	Template [#TotalAmount#]

Utilization

To use these macros in templates, when creating a template, select standard macros from the menu and select the desired macro from the list. When generating a message based on a template, the system will replace the macros in the template with the set up values.



Result Letter

Dear Sam Davidson your order has been confirmed

Number: ORD-126

Date: 5/30/2022 8:00 AM

Product quantity: 3

Total: 11300,00

Total of most expensive product: 2300,00

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Windows 11pro (W7509876549) (4,000)

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CONTACT US:

salesup-it.com
care@salesup-it.com

+38 050 140 11 22
Kyiv, Lobanovskoho Avenue, 119B

