CONFERO

TimeSlot for Creatio

Interactive invitation

Version 1.0

Admin's Manual

List of Contents

1.   Introduction

App TimeSlot for Creatio is delivered as .zip file containing all the necessary packages, as well as additional archive, containing the necessary files for correct performance of the app.

After installation of the app, in section System settings of the System designer, there will be a static group TimeSlot created. It contains settings necessary for the functioning of the solution. Some settings will be filled in with demo values by default.

This admin's manual contains step-by-step instructions for installation and description of system settings developed for TimeSlot for Creatio.

The basic functionality of Creatio is available at company's website https://academy.creatio.com

2. Installing TimeSlot for Creatio

1. Install the package

Install the app from section Install and uninstall of applications in System designer, as well as unpacking archive from additional package in server file system.

2. Unpack the archive on the server to a folder, where Creatio application is installed (settings in section 4 of this manual 4).

3. Register an anonymous service Terrasoft.Configuration.Confero.CfTcMeetingScheduleService (settings in section 4 of this manual) in accordance with Creatio development guide (for more details click the link that leads to Creatio website).

4. Set up access rights for system operations in TimeSlot for Creatio.

Open System designer, by clicking on 🔧 in upper right corner of the app. In section, Users and administration click on the link Operation permission. In each operation, one can add certain groups of users.
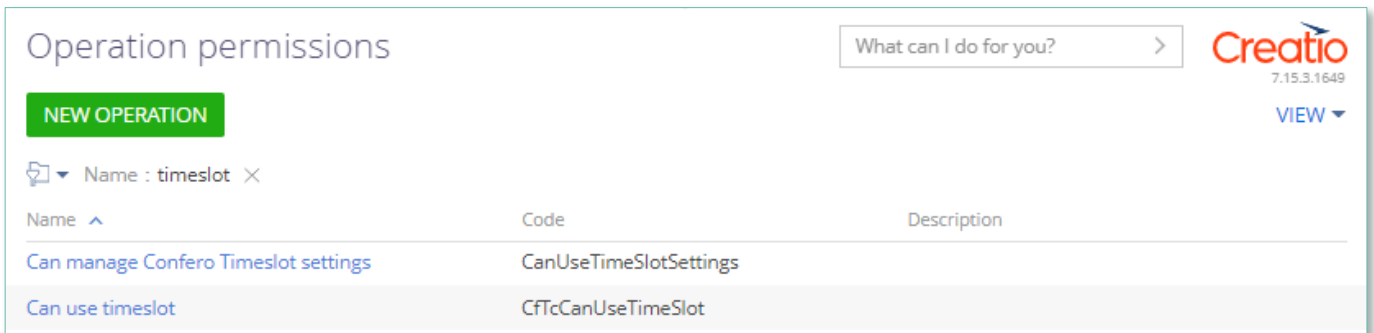

Image 1. Operation permission

5. Setup of path to system folders TimeSlot for Creatio

Open System designer, by clicking on 🔧 in upper right corner of the app. In section Admin area click on the link TimeSlot settings.

Image 2. TimeSlot settings in section Admin area

On the detail Paths, there are the following paths indicated:
- Local path to unpacked archive (section 2 of this manual)
- URL path from browser
- Path of the anonymous web service (section 3 of this manual)

NB!
Upon update of the version of Creatio, these folders will be overwritten!
Please make a backup copy of the folder before installing the new version of Creatio.

6.   Setting templates for HTML pages, opening for the user upon interaction with the slots from mailbox

Open System designer, by clicking on 🔧 in upper right corner of the app. In section Admin area click on the link TimeSlot Settings.

On the detail Templates, there are the following templates stored:
- HTML page template
- Confirmation page template
- Already selected HTML page template
- Not available HTML page template

TimeSlot settings

SAVE   CANCEL

< GENERAL

☑ Paths
☑ Templates

```html
<html>
    <head>
        <meta charset="UTF-8">
        <style>
            body {
                background: rgb(23,60,52);
                color: rgb(255,255,255);
                font-family: EuclidCircularA,Helvetica,Arial,sans-serif;
                margin-top: 100px;
                margin-left: 80px;
                text-size: 16px;
            }
            a:visited {
                color: white;
            }
            a {
                color: white;
            }
            .h1 {
                font-weight: 300;
```
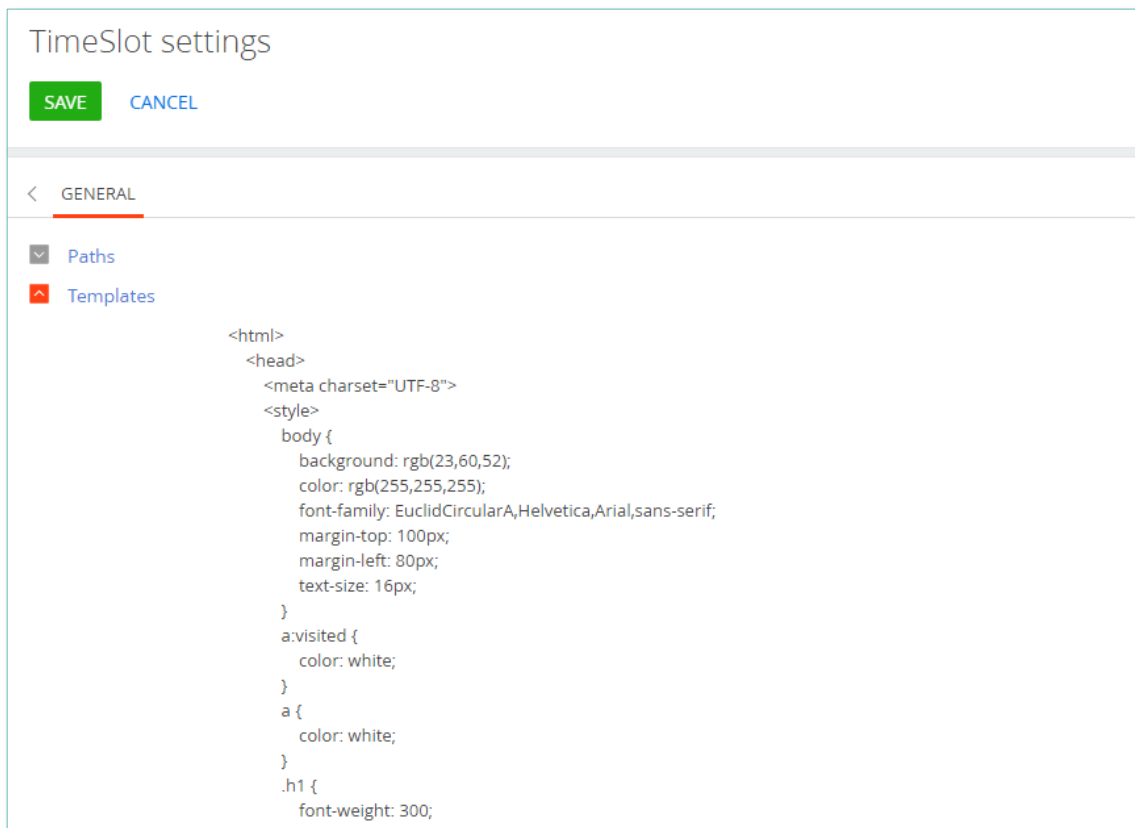
Image 3. Settings of invitation templates in Admin area

7.   Set up mailbox in accordance with [Creatio development guide](#) (for more details click the link that leads to Creatio website)

Open your account by clicking on 🔘 in the right upper corner of the app. In the form that will open, click on

Email accounts

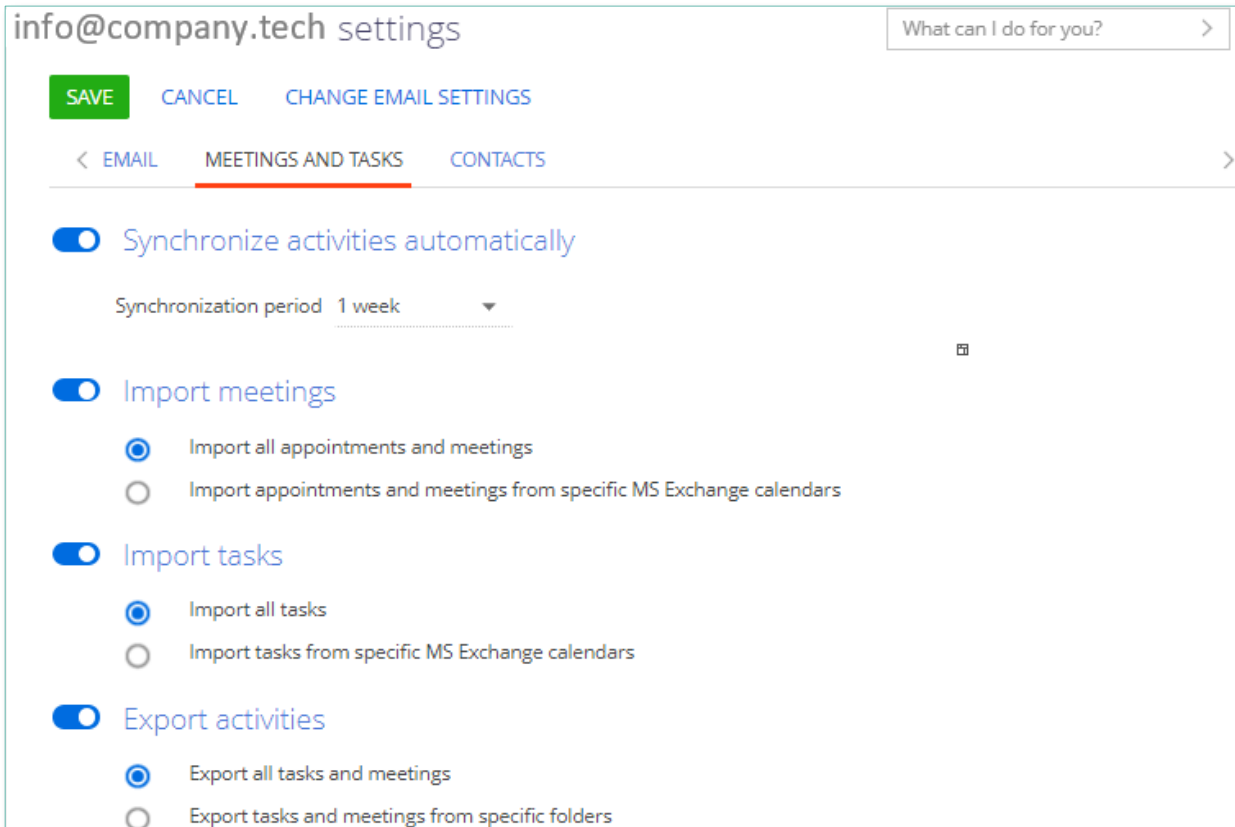Image 4. Settings of Email accounts (in tab Email)

Image 5. Settings of Email accounts (tab Meeting and tasks)

8. Enter private email in user's contacts

Employee's card should contain their email address, from which the invitations to the meeting will be sent.
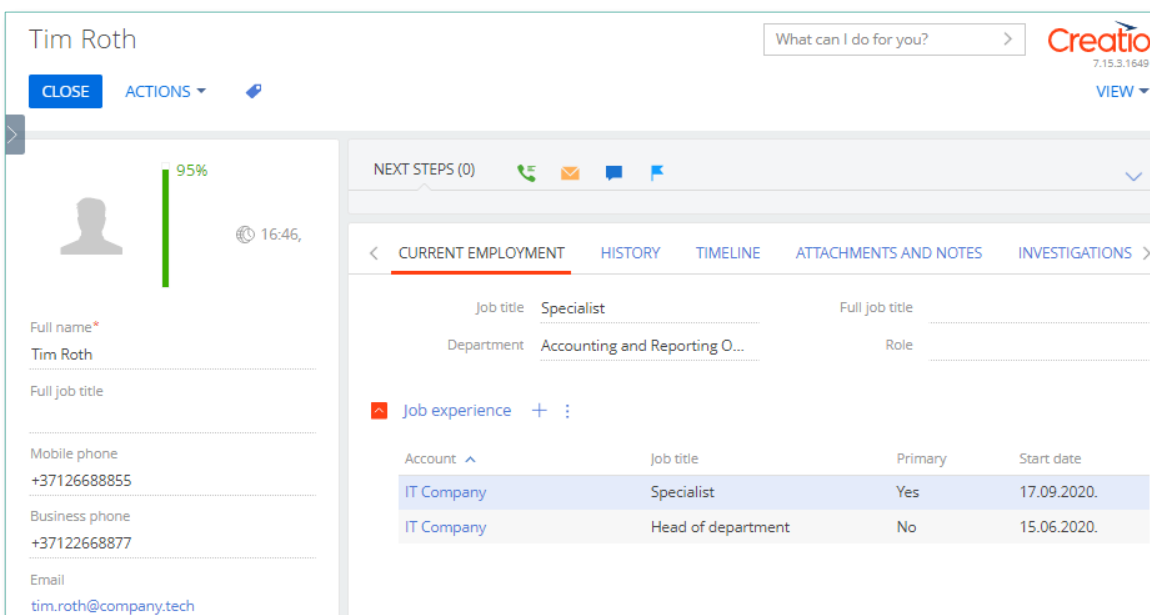

Image 6. Employee card in section Contacts

3.   Section System settings

Section System settings is used for additional settings of the sections in the system. Using System settings one can also set default value that will be filled in automatically in the designated fields upon creating a new entry, for example, activity status.

To go to this section, open System designer by clicking ⚙ in the upper right corner of the app. In section System setup click on the link System settings.

3.1.   System setup page

In order to enter or change a system setting value use System setup page.

Field	Description
Name	Name of the system setting that will appear in the system interface for the users.
Type	Type of system setting field. Defines a type of filling in of the system setting. This field can be edited upon adding new system setting and is read only for previously registered entries.
Default value	The field is used for determining the value of system setting. For example, one can set value "Not started" for the activity status by default or 5-minut interval for checking the notifications. Type of filling in the field [Value] depends on the type of system setting, e.g., activity status by default is chosen from lookup, and notification check interval – counting number.
Code	A code used for the system to identify the setting. Value of this field should contain Latin letters and digits, without spaces.
Cashed	A feature indicating that the value of the system setting should be scanned just once after entering the system, because these values are changing seldom.
Individual	This feature means that the system setting value is set individually for the current user.
Allow for portal users	Activating this feature means that the given system setting can be used by the self-service portal users.

3.2.   List of system settings

The system offers several system settings that are used upon filling in a document in TimeSlot for Creatio. The settings for TimeSlot for Creatio are arranged in a separate branch.

Name	Code	Notes
Section TimeSlot		
Working hours from	CfTcWorkingHoursFrom	Default value 9:00

Name	Code	Notes
Email validation regex	CfTcEmailValidationRegex	^[\w+\d+._]+\@[\w+\d+_+]+\.[\w+\d+._]{2,8}$
Mailbox for sending confirmation emails in TimeSlot	CfTcTimeSlotConfirmationMailbox	Value from Lookup Mailbox synchronization settings
Working hours till	CfTcWorkingHoursTill	Default value 18:00

4.   Email templates

Lookup Email templates is intended for creating message templates that will be used in business processes and communication with clients.

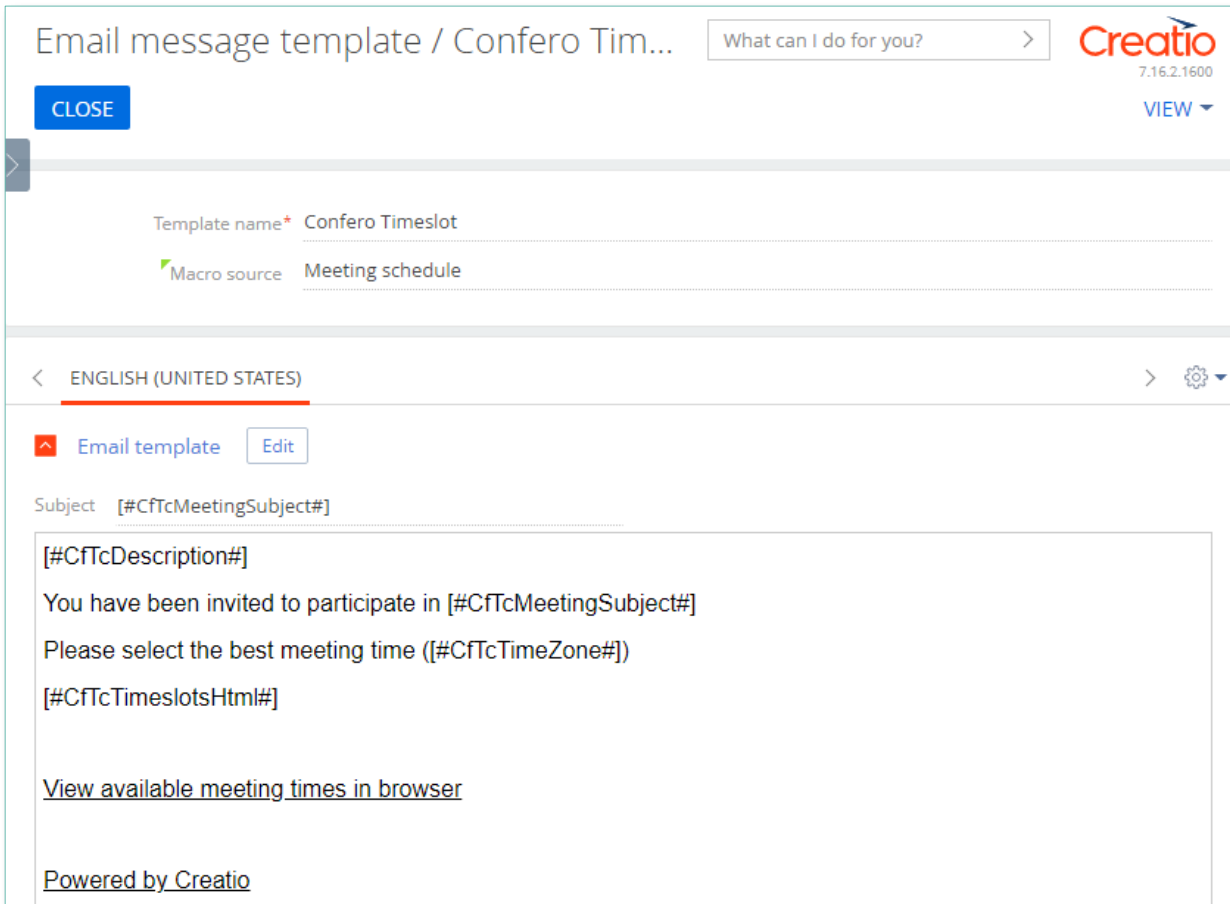| Field	Description
Template name	Template name. Mandatory field. For multi-language templates, the system automatically adds the language abbreviation to the template name created by the user.
Source of macros	System object (section or detail) with fields that can be used in the template as macros.
Template field	In the right upper corner of the template field click ⚙ to add tabs on other languages. Each tab offers: • "Edit" button that leads to designer of content, where one can create new template or edit previously chosen template. • Field "Subject". Value in this field is automatically uploaded to Email Subject field when choosing a template from lookup.

Image 7. Template Confero TimeSlot

TimeSlot for Creatio is using several templates for generating body text for mailout.

Template name	Subject	Macro source
Confero TimeSlot	[#CfTcMeetingSubject#]	Meeting schedule
Confero TimeSlot confirmed (US)	[#CfTcMeetingSubject#]	Meeting schedule