



User guide

Records color highlighting for Creatio

CRM TOOLS

Contents

Introduction..... 3

Setting up the add-on 4

Simple mode 6

Advanced mode..... 8



Introduction

The **Records color highlighting for Creatio** facilitates navigating through records in Creatio sections and details focusing user's attention on relevant records highlighted upon preconfigured rule. You can use simple or extended mode to create record highlighting rules for a section.

Add-on is handy for Creatio users, who work with extensive registries and instead of filtering require system to provide additional signifiers of the important entries selected upon certain condition, for example:

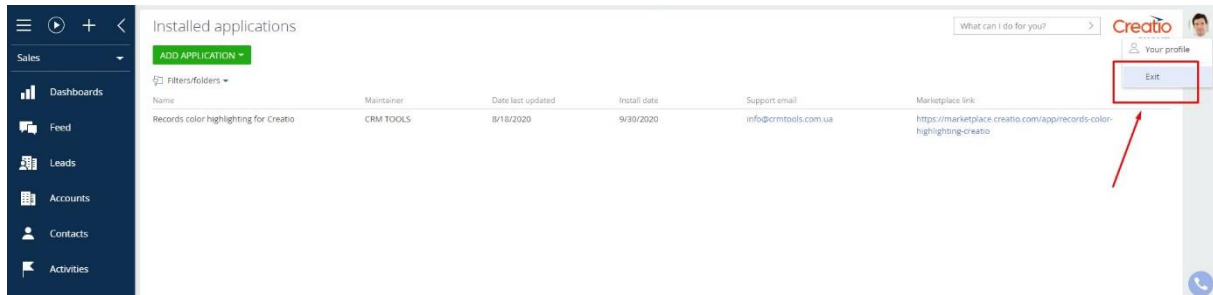
- in Cases section to attract service desk specialist's attention to requests from a specific customer or with certain status;
- in Leads section to focus sales managers attention on potential customers from specific region or industry, or need for products;
- in Contacts section to mark all employees associated with one Account.

Setting up the add-on

Installation of the add-on is carried out by standard means: install from file or selection from Marketplace.

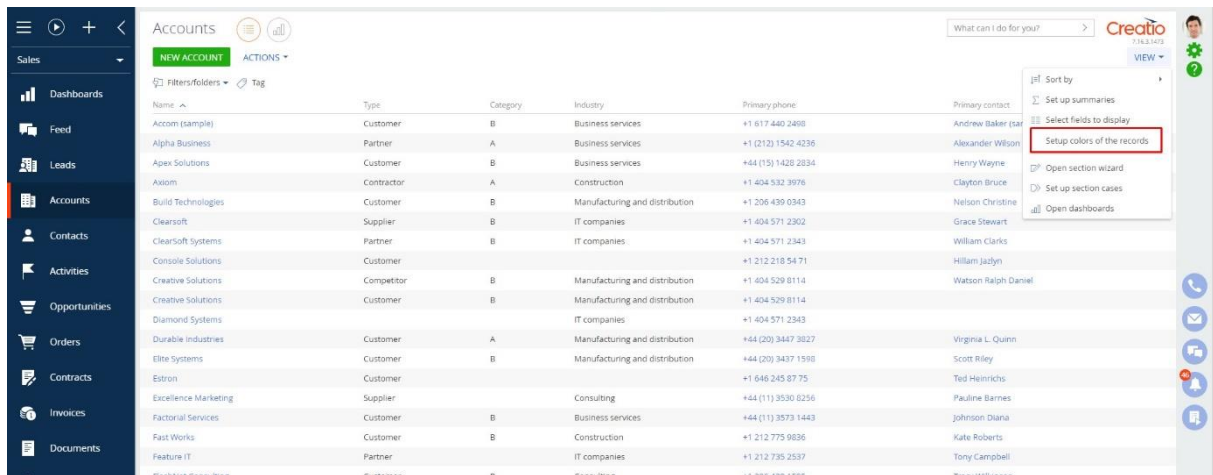
After installation of the add-on, it is recommended exit and login to Creatio again (Fig. 1).

Fig. 1 – Installing the add-on



To open settings, go to the required **section** and in the upper right corner press [View] menu, select [Customize the colors of entries] (Fig. 2).

Fig. 2 – Settings menu in section

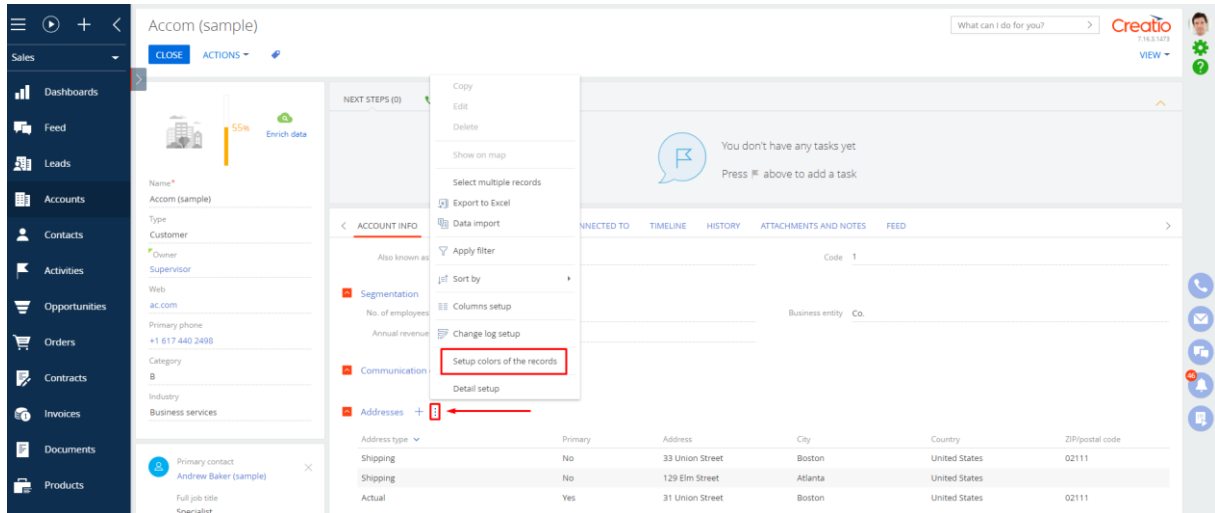


To go to the settings of the rules for highlighting records in **detail**, select the [Customize records colors] item in the menu of the corresponding detail (Fig. 3).

Simple and advanced modes are available in the add-on for creating selection rules.

If you need to adjust the highlighting by the values of one field, then use the **Simple mode**. For example, in the Leads section for highlighting hot and cold leads by the [Need maturity] field.

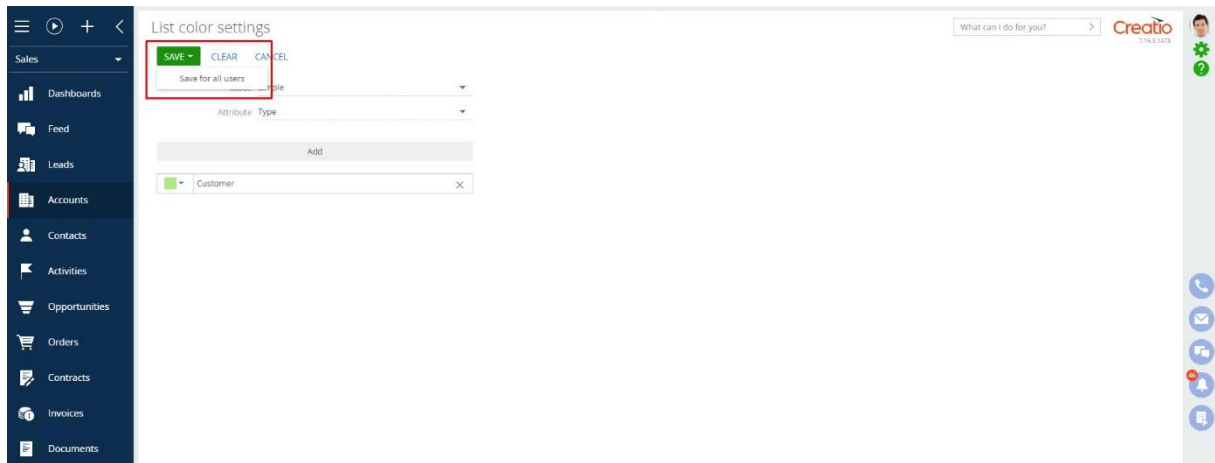
Fig. 3 – Settings menu in detail



If you need to color highlighting records from the values of several fields of the selected or linked object, use the **Advanced mode**. For example, to select in the section those counterparties whose type is [Client] and for which the number of sales completed with a victory is more than 10.

Each user can customize the highlighting of records in sections and system details individually. Also, system administrators have the option to save the current settings for all users (Fig. 4).

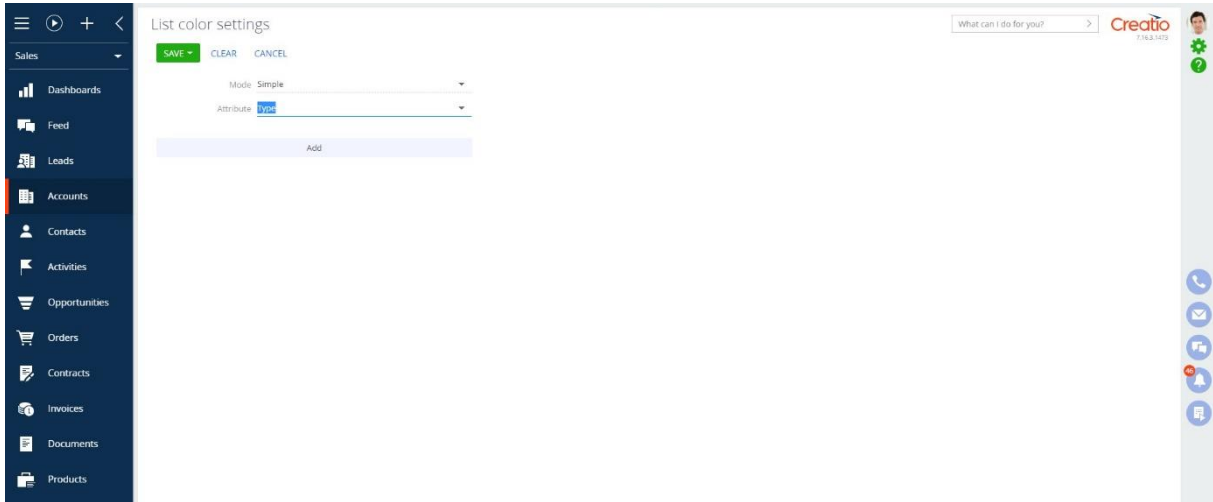
Fig. 4 – Saving settings under the system administrator account



Simple mode

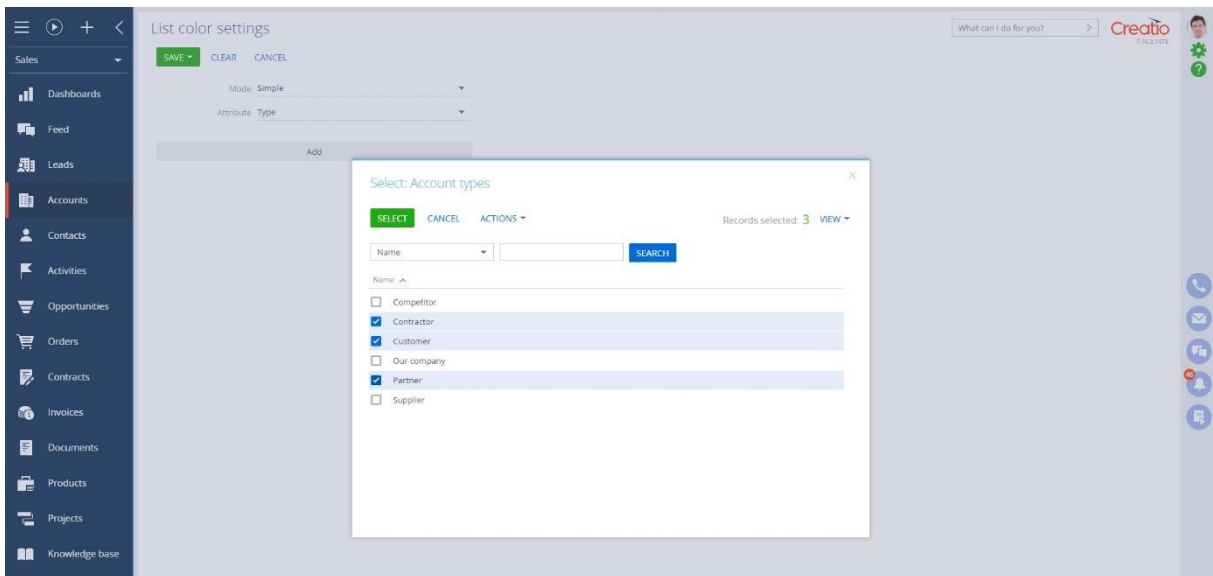
1. Go to the selection settings and select the [Simple] mode and specify the attribute of the object by which you want to set the highlighting rule (Fig. 5).

Fig. 5 – Color settings menu in Simple mode



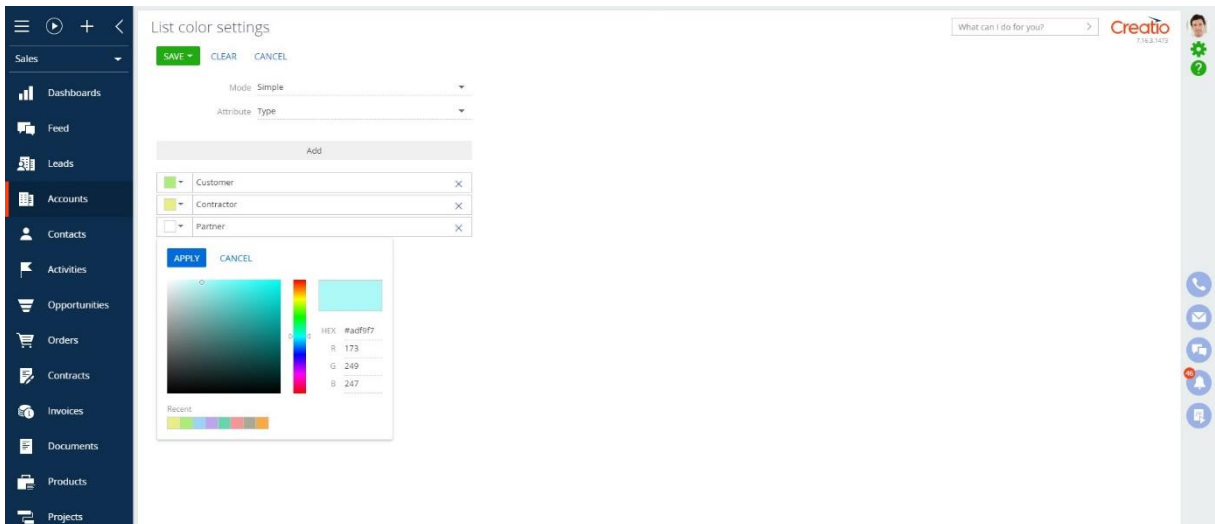
2. Click the [Add] button and select the desired options for the attribute value (Fig. 6).

Fig. 6 – Selecting attribute values in Simple mode



3. After that, for each value, select the appropriate color by clicking on the arrow to the left of the entry and the [Apply] button (Fig. 7).

Fig. 7 – Setting the colors of the corresponding attribute values in Simple Mode



4. Click the [Save] button to save the settings.
5. After moving to the selected section or detail, check the result of highlighting records with the specified attributes in the appropriate colors (Fig. 8).

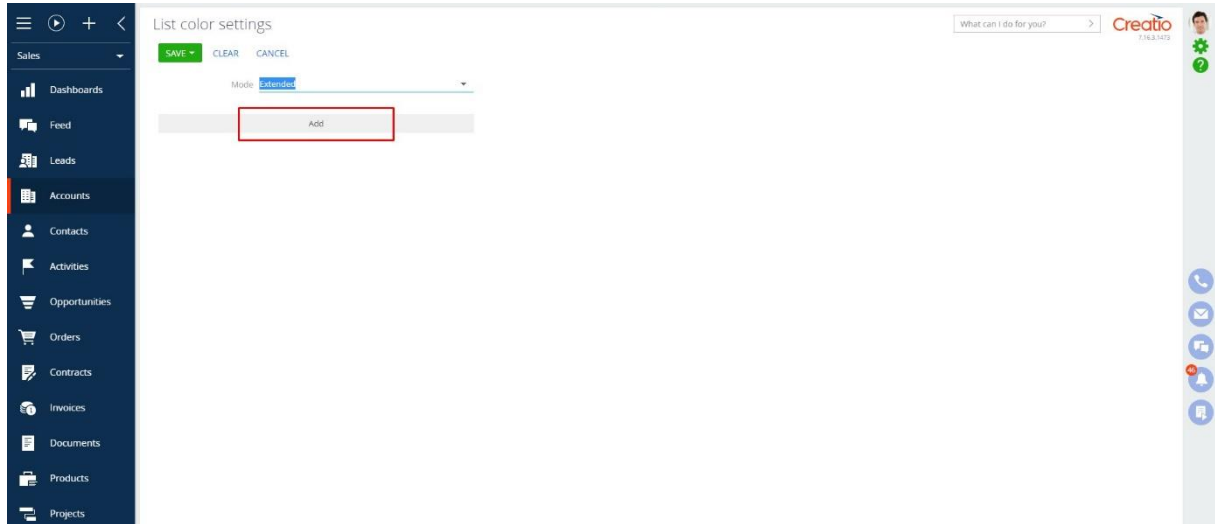
Fig. 8 – Result of highlighting records in Simple mode

Name	Type	Category	Industry	Primary phone	Primary contact
Accom (sample)	Customer	B	Business services	+1 817 440 2490	Andrew Baker (sample)
Alpha Business	Partner	A	Business services	+1 (212) 1542 4236	Alexander Wilson
Apex Solutions	Customer	B	Business services	+44 (15) 1428 2334	Henry Wayne
Axiom	Contractor	A	Construction	+1 404 532 9976	Clayton Bruce
Bold Technologies	Customer	B	Manufacturing and distribution	+1 206 499 0343	Nelson Christine
Clearsoft	Supplier	B	IT companies	+1 404 571 2302	Grace Stewart
ClearSoft Systems	Partner	B	IT companies	+1 404 571 2343	William Clarks
Console Solutions	Customer	B	Manufacturing and distribution	+1 212 219 54 71	Hilari Jazyn
Creative Solutions	Competitor	B	Manufacturing and distribution	+1 404 529 8114	Watson Ralph Daniel
Creative Solutions	Customer	B	Manufacturing and distribution	+1 404 529 8114	
Diamond Systems	Customer	B	IT companies	+1 404 571 2343	
Durable Industries	Customer	A	Manufacturing and distribution	+44 (20) 3447 3027	Virginia L. Quinn
Elite Systems	Customer	B	Manufacturing and distribution	+44 (20) 5437 1598	Scott Riley
Estion	Customer	B	Manufacturing and distribution	+1 646 245 87 75	Ted Heinrichs
Excellence Marketing	Supplier	B	Consulting	+44 (11) 3530 8256	Pauline Barnes
Factorial Services	Customer	B	Business services	+44 (11) 3573 1443	Johnson Diana
Fast Works	Customer	B	Construction	+1 212 775 9836	Kate Roberts
Feature IT	Partner	B	IT companies	+1 212 738 2837	Tony Campbell
FlashNet Consulting	Customer	B	Consulting	+1 206 429 1595	Tracy Wilkinson
FlashNet Development	Competitor	B	Business services	+1 206 429 1595	Peter Moore
Future Vision	Customer	B	Consulting	+1 206 484 3964	Ronald Young
Gateway	Customer	B	Business services	+44 (15) 1432 4926	Travis Barker
GDC Innovative	Customer	B	Banks	+44 (20) 4573 3034	Morriz Lee
Global Venture	Contractor	B	Advertising	+1 212 721 1810	Zane Rogers
Goldfish Technologies	Contractor	B	IT companies	+44 (15) 1432 9073	Susan Lee
Gtchx	Customer	B	Business services	+1 646 487 26 91	Nora Wesley
Infocom	Customer	B	Business services		Barber Andrew

Advanced mode

1. Go to the selection settings, select the [Advanced] mode and click the [Add] button (Fig. 9).

Fig. 9 – Color settings menu in Advanced mode



2. Customize the view of records (or several views) according to the required parameters. To do this, specify the name of the view, select the appropriate color (by clicking on the arrow below the name and after selecting the [Apply] button) and select the filter (Fig. 10, 11).

Fig. 10 – Setup the first view in Advanced mode

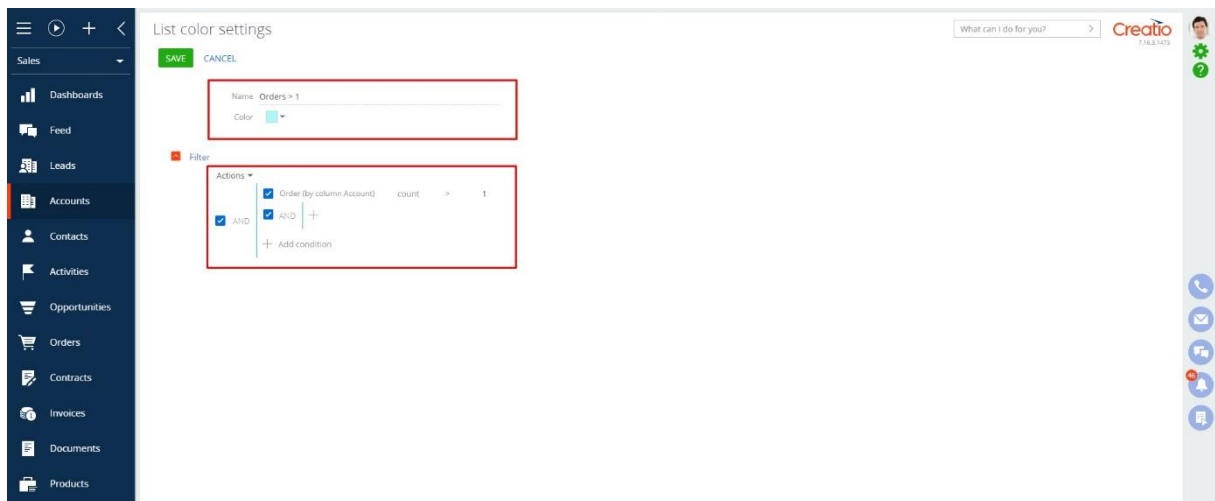
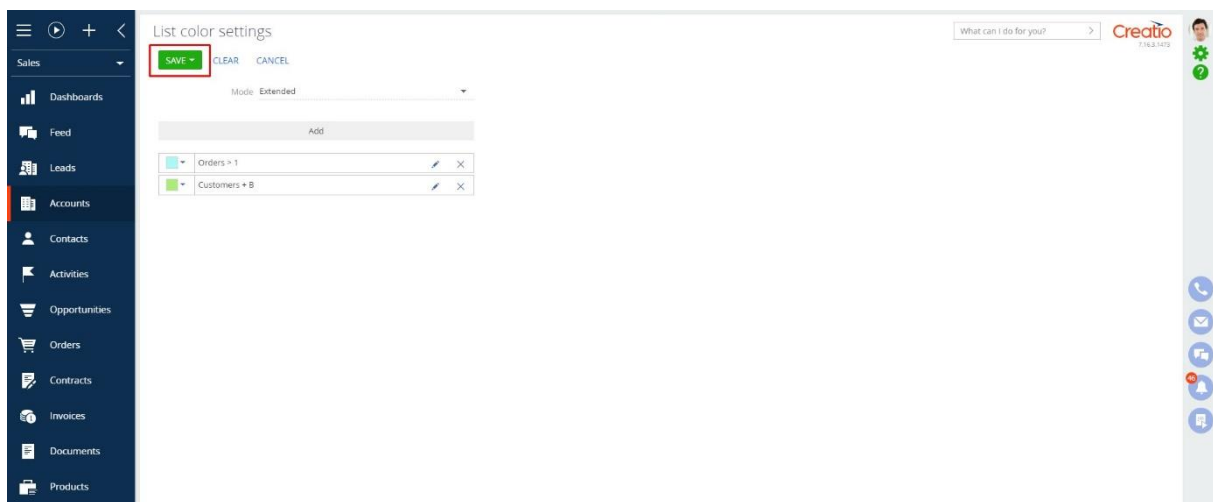


Fig. 11 – Setup the second view in Advanced mode



3. Click the [Save] button to save the settings (Fig. 12).

Fig. 12 – Saving selected settings in Advanced Mode



4. After moving to the selected section or detail, check the result of highlighting records with the specified attributes in the appropriate colors (Fig. 13).

Fig. 13 – Result of highlighting records in Advanced mode

Name	Type	Category	Industry	Primary phone	Primary contact
Accom (sample)	Customer	B	Business services	+1 617 802 2498	Andreas Baker (sample)
Alpha Business	Partner	A	Business services	+1 (212) 1542 4236	Alexander Wilson
Apex Solutions	Customer	B	Business services	+44 (15) 1428 2834	Henry Wayne
Axiom	Contractor	A	Construction	+1 404 532 3976	Clayton Bruce
Build Technologies	Customer	B	Manufacturing and distribution	+1 206 429 0343	Nelson Christine
Clearsoft	Supplier	B	IT companies	+1 404 571 2302	Grace Stewart
ClearSoft Systems	Partner	B	IT companies	+1 404 571 2343	William Clarke
Console Solutions	Customer	B	Manufacturing and distribution	+1 212 218 54 71	Hillam Jazlyn
Creative Solutions	Competitor	B	Manufacturing and distribution	+1 404 529 8114	Watson Ralph Daniel
Creative Solutions	Customer	B	Manufacturing and distribution	+1 404 529 8114	Scott Riley
Diamond Systems	Supplier	B	IT companies	+1 404 571 2343	Virginia L. Quinn
Durable Industries	Customer	A	Manufacturing and distribution	+44 (20) 3447 3827	Scott Riley
Elite Systems	Customer	B	Manufacturing and distribution	+44 (20) 3437 1596	Teo Heinrichs
Estroon	Customer	B	Consulting	+1 646 245 87 75	Pauline Barnes
Excellence Marketing	Supplier	B	Consulting	+44 (11) 3530 8256	Johnson Diana
Factorial Services	Customer	B	Business services	+44 (11) 3573 1443	Kate Roberts
Fast Works	Customer	B	Construction	+1 212 775 9636	Tony Campbell
Feature IT	Partner	B	IT companies	+1 212 735 2537	Tracy Wilkinson
FlashNet Consulting	Customer	B	Consulting	+1 206 429 1595	Peter Moore
FlashNet Development	Competitor	B	Business services	+1 206 429 1595	Ronald Young
Future Vision	Customer	B	Consulting	+1 206 434 3964	Travis Barker
Gateway	Customer	B	Business services	+44 (15) 1432 4926	



For the note

If there are records corresponding to two or more filters, they will be highlighted with the color of the view that is located above on the settings page. To change the priority of the selection, drag the desired view in the settings above or below (Fig. 14, 15).

Fig. 14 – Changing the priority of highlighting records in Advanced mode

List color settings

SAVE CLEAR CANCEL

Mode: Extended

Add

- Customers + B
- Orders > 1

Fig. 15 – Result of changing the priority of highlighting records in Advanced mode

Accounts NEW ACCOUNT ACTIONS

Filters/folders Tag

What can I do for you? Creatio VIEW

Name	Type	Category	Industry	Primary phone	Primary contact
Accom (sample)	Customer	B	Business services	+1 617 440 2490	Andrew Baker (sample)
Alpha Business	Partner	A	Business services	+1 (212) 1542 4236	Alexander Wilson
Apex Solutions	Customer	B	Business services	+44 (15) 1428 2834	Henry Wayne
Axiom	Contractor	A	Construction	+1 404 532 3976	Clayton Bruce
Burg Technologies	Customer	B	Manufacturing and distribution	+1 206 459 0345	Nelson Christine
Clearsoft	Supplier	B	IT companies	+1 404 571 2302	Grace Stewart
ClearSoft Systems	Partner	B	IT companies	+1 404 571 2343	William Clarks
Console Solutions	Customer			+1 212 218 54 71	Hilam Jaelyn
Creative Solutions	Competitor	B	Manufacturing and distribution	+1 404 529 8114	Watson Ralph Daniel
Creative Solutions	Customer	B	Manufacturing and distribution	+1 404 529 8114	
Diamond Systems			IT companies	+1 404 571 2343	
Durable Industries	Customer	A	Manufacturing and distribution	+44 (20) 3447 3027	Virginia L. Quinn
Elite Systems	Customer	B	Manufacturing and distribution	+44 (20) 3437 1598	Scott Riley
Estro	Customer			+1 646 245 87 75	Tei Heinrichs
Excellence Marketing	Supplier		Consulting	+44 (1) 3530 8256	Pauline Barnes
Factorial Services	Customer	B	Business services	+44 (11) 3573 1443	Johnsons Diana
Fisk Works	Customer	B	Construction	+1 212 775 9036	Kate Roberts
Feature IT	Partner		IT companies	+1 212 735 2537	Tony Campbell
FlashNet Consulting	Customer	B	Consulting	+1 206 429 1595	Tracy Wilkinson
FlashNet Development	Competitor	B	Business services	+1 206 429 1595	Peter Moore
Future Vision	Customer	B	Consulting	+1 206 434 3964	Ronald Young
Gateway	Customer	B	Business services	+44 (15) 1432 4926	Travis Barker
GDC Innovative	Customer	B	Banks	+44 (20) 4573 3854	Morris Lee