

# VACATION REQUESTS FOR CREATIO

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Guide to setup and utilization

27.07.2022

## **1 Product description**

'Vacation' is a module solution that allows you to keep a complete account of vacations for system users using the Creatio system interface.

≡	• + <	Vacations				What can	l do for you?	>	Creatio	$\bigcirc$
Sales	-	ADD ACTIONS -							VIEW -	*
F	Activities	🖓 Filters/folders 🕶 🧷 Tag								
		Name	Vacation type	Start date 🐱	Calendar day count	End date	Status			
₹	Opportunities	Vacation: Sam Davidson 11.07.2022 - 12.07.2022	Unpaid	7/11/2022	2	7/12/2022	Draft			
		Vacation: Sam Davidson 11.07.2022 - 03.08.2022	Paid	7/11/2022	24	8/3/2022	Approval			
Ë	Orders	Vacation: Supervisor 11.07.2022 - 25.07.2022	Paid	7/11/2022	15	7/25/2022	Done			
	6	Vacation: Stefan Snider 11.07.2022 - 13.07.2022	Unpaid	7/11/2022	3	7/13/2022	Done			-
1	Contracts	Vacation: Sam Davidson 11.07.2022 - 22.07.2022	Unpaid	7/11/2022	12	7/22/2022	Done			
5	Invoices	Vacation: Sam Davidson 10.07.2022 - 30.07.2022	Paid	7/10/2022	21	7/30/2022	Approval			
	invoices	Vacation: Stefan Snider 08.07.2022 - 21.07.2022	Paid	7/8/2022	14	7/21/2022	Done			U
٨	Issue	Vacation: Supervisor 07.07.2022 - 27.07.2022	Paid	7/7/2022	21	7/27/2022	Done			9
		Vacation: Stefan Snider 07.07.2022 - 13.07.2022	Unpaid	7/7/2022	7	7/13/2022	Approval			U
hh	Documents	Vacation: Stefan Snider 07.07.2022 - 10.07.2022	Maternity leave	7/7/2022	4	7/10/2022	Done			
		Vacation: Stefan Snider 07.07.2022 - 11.07.2022	Sick leave	7/7/2022	5	7/11/2022	Done			-
	Products	Vacation: Stefan Snider 07.07.2022 - 18.07.2022	Unpaid	7/7/2022	12	7/18/2022	Approval			
	-	Vacation: Sam Davidson 05.07.2022 - 07.07.2022	Sick leave	7/5/2022	3	7/7/2022	Done			
	Projects	Vacation: Supervisor 01.07.2022 - 08.07.2022	Paid	7/1/2022	8	7/8/2022	Approval			
	Knowledge base	Vacation: Supervisor 01.07.2022 - 04.07.2022	Sick leave	7/1/2022	4	7/4/2022	Done			
	rationicage base	Vacation: Stefan Snider 01.07.2022 - 03.07.2022	Unpaid	7/1/2022	3	7/3/2022	Done			
ф <sup>ф</sup>	Vacations	Vacation: Stefan Snider 01.07.2022 - 07.07.2022	Paid	7/1/2022	7	7/7/2022	Approval		↑ UP	

## **1.1 Utilization options**

The solution allows you to keep track of vacations by the following types:

- Paid;
- Maternity leave;
- Sick leave;
- Unpaid.

## **1.2 Opportunities**

- Customization of individual characteristics of the company, namely:
  - Number of vacation days per year;
  - Number of unpaid leave, days;
  - Number of vacation days available from the future period;
- Maintaining annual vacation periods for each employee;
- Automatic accounting of employees' vacation days involved in different annual periods;
- Opportunity of system subtraction of holidays on holidays;
- Accounting for all types of vacations for all employees;

• Systematic formation of the vacation period, taking into account the days involved, only after the vacation is agreed.

## 2 Product installation and setup

## **2.1 Product installation**

To install packages, go to System Designer and select "Add/Remove applications".

On the "Add/Remove applications" page, click "Choose from Marketplace", enter your booth address, and click Install.

If you are installing a product package from a file, you must request an up-to-date package from Sales'Up support. Next, on the "Add/Remove Applications" page, click "Install from file", specify the path to the archive with the package and complete the installation.

## 2.2 Preliminary setup and utilization of 'Vacations' product

#### 2.2.1 Setup before utilization

For preliminary set up before the utilization of the module, you have to:

1. In the system designer, go to 'Lookups'



2. Find 'Calendars' lookup and enter it.

## Lookups



3. Add a calendar where holidays will be considered as days-off. Or correct the existing calendar. Entered holidays will not be counted as a vacation day.

2018-2026	18-2026			What can I do for you?	>	Creatio			
CLOSE ACTIONS -						8.0.1.1990 Debug			
Name* 2018-2026 Description			Time zone* Helsinki, Kyiv, Riga, Sofia, Tallinn, Vilnius (GMT+02:00)						
< WORKING WEEK PARAMETERS	DAYS OFF					>			
Days off + :									
Date	Day type	Working time							
12/25/2026	Day off								
10/14/2026	Day off								
8/24/2026	Day off								
6/28/2026	Day off								
6/16/2026	Day off								
5/9/2026	Day off								
5/1/2026	Day off								
4/28/2026	Day off								
3/8/2026	Day off								
1/7/2026	Day off								

#### 4. In the system designer, go to system settings

System setup
 Languages
 Translation
 Lookups
 System settings
 Report setup
 Section wizard
 ML models
 Detail wizard
 Mobile application wizard
 SalesUp license manager

#### 5. Choose 'Vacations' settings group.



6. In the "Calendar for Vacations" system setting, select the required existing calendar, which will take into account holidays that will not be included in the calculation of the vacation period.

acation caler	ndar			What can I do for you?	>	Creatio
CLOSE						
Name*	Vacation colondar	Control	Subjection Calenda			
Type*	Lookup	Cached		1		
Lookup*	Calendar	Save value for current				
Default value	2018-2026	user				
Description						
Allow by opera	ation					
<ul> <li>Allow for all</li> </ul>						
O Restrict for all						
O Allow by opera	ation					
Access for portal u	isers					

7. In the system setting "Number of vacation days per year", you can set the required number of vacation days per year. The default is 24 days.

Annual vacatio	nual vacation day count			What can I do for you? > Crect			
CLOSE							
Name*	Annual vacation day count	Code*	SuAnnualVacat	tionDayCount			
Type*	Integer	Cached					
Default value	24	user	<b>~</b>				
Description							
<ul> <li>Access for reading</li> <li>Allow for all</li> </ul>	for internal users (i)						
<ul> <li>Restrict for all</li> </ul>							
O Allow by opera	ation						
Access for modific	ation for internal users (i)						
Allow for all							
O Restrict for all							
O Allow by opera	ation						
Access for portal u	isers						
Allow reading	for portal users						

8. In the system setting "Unpaid vacation, days", you can set the number of unpaid vacation days per year. The default is 10 days. Unpaid leave can be up to 15 calendar days per year

Number of ur	Number of unpaid leave, days				>	
CLOSE						0.0.1.1990 Debug
>						
Name*	Number of unpaid leave, days	Code*	AmountOfUnpaidD	ayOff		
Туре*	Integer	Cached				
Default value	10	Save value for current user				
Description						
Access for reading	g for internal users (i)					
Restrict for all	1					
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Allow for all						
<ul> <li>Restrict for al</li> </ul>	II					
O Allow by oper	ration					
Access for portal u	users					
Allow reading	g for portal users					

9. In the system setting "Number of available vacation days from the future period", you can set a limit on the number of vacation days involved from the future annual vacation period.

Number of vacation days available from the future period

What can I do for you?	>	Creatio
		8.0.1.1990 Debug

Name*	Number of vacation days available from the future period	Code* Su	uAvailableVacationDaysFromFuturePeriod
Type*	Integer	Cached 🔽	2
Default value	5	Save value for current user	]
Description			
ccess for reading	for internal users (i)		
Allow for all			
Restrict for all			
Allow by opera	ation		
ccess for modific	ation for internal users (i)		
Allow for all			
Restrict for all			
Allow by opera	ation		
access for portal u	Isers		
	f		

#### 2.2.2 'Vacations' section. Filling in the system with data

#### 2.2.2.1 Adding vacations in the 'Vacations' section

The "Vacations" section is necessary for keeping records of vacations, sick leaves and maternity leaves of company employees.

To add a new vacation record:

- 1. Go to the "Holidays" section.
- 2. Click the "Add" button.

≡	• + <	Vacations				What can	I do for you?	Creatio 8.0.1.1990	Q
Sales	•	ADD ACTIONS -						VIEW 🕶	8
	Activities	🖓 Filters/folders 👻 🧷 Tag							•
		Name	Vacation type	Start date 💙	Calendar day count	End date	Status		
₹	Opportunities	Vacation: Sam Davidson 11.07.2022 - 12.07.2022	Unpaid	7/11/2022	2	7/12/2022	Draft		
~		Vacation: Sam Davidson 11.07.2022 - 03.08.2022	Paid	7/11/2022	24	8/3/2022	Approval		
Ë	Orders	Vacation: Supervisor 11.07.2022 - 25.07.2022	Paid	7/11/2022	15	7/25/2022	Done		
E.	Contracts	Vacation: Stefan Snider 11.07.2022 - 13.07.2022	Unpaid	7/11/2022	3	7/13/2022	Done		
7	Contracts	Vacation: Sam Davidson 11.07.2022 - 22.07.2022	Unpaid	7/11/2022	12	7/22/2022	Done		
6	Invoices	Vacation: Sam Davidson 10.07.2022 - 30.07.2022	Paid	7/10/2022	21	7/30/2022	Approval		0
		Vacation: Stefan Snider 08.07.2022 - 21.07.2022	Paid	7/8/2022	14	7/21/2022	Done		0
٨	Issue	Vacation: Supervisor 07.07.2022 - 27.07.2022	Paid	7/7/2022	21	7/27/2022	Done		5
		Vacation: Stefan Snider 07.07.2022 - 13.07.2022	Unpaid	7/7/2022	7	7/13/2022	Approval		-
hh	Documents	Vacation: Stefan Snider 07.07.2022 - 10.07.2022	Maternity leave	7/7/2022	4	7/10/2022	Done		
		Vacation: Stefan Snider 07.07.2022 - 11.07.2022	Sick leave	7/7/2022	5	7/11/2022	Done		
	Products	Vacation: Stefan Snider 07.07.2022 - 18.07.2022	Unpaid	7/7/2022	12	7/18/2022	Approval		
_		Vacation: Sam Davidson 05.07.2022 - 07.07.2022	Sick leave	7/5/2022	3	7/7/2022	Done		
	Projects	Vacation: Supervisor 01.07.2022 - 08.07.2022	Paid	7/1/2022	8	7/8/2022	Approval		
	Knowledge base	Vacation: Supervisor 01.07.2022 - 04.07.2022	Sick leave	7/1/2022	4	7/4/2022	Done		
	Total and a second s	Vacation: Stefan Snider 01.07.2022 - 03.07.2022	Unpaid	7/1/2022	3	7/3/2022	Done		
4). ()	Vacations	Vacation: Stefan Snider 01.07.2022 - 07.07.2022	Paid	7/1/2022	7	7/7/2022	Approval	↑ UP	

3. On the vacation record page, you must fill in all the required fields and the vacation period:

- a. Contact selection from the "Contacts" lookup;
- b. Vacation type selection from the "Type of vacation" lookup. Values: Paid, Maternity leave, Sick leave, Unpaid;
- c. Status selection from the "Vacation status" lookup. Values: Draft, Approval, Done, Canceled;
- d. Created by filled in automatically by the user who created the vacation record. Non-editable field;
- e. Start date the start date of the vacation;
- f. End date the end date of the vacation;
- g. Calendar day count filled in automatically, the number of calendar days including the start date and end date of the vacation;
- h. Calendar day remainder filled in automatically, the remaining calendar days in the current vacation period of the employee. The vacation period of the contact is the annual period of the employee, from the date of the working start, to the same date of the next year. For this annual period of time, they have a certain number of vacation days per year (configured in paragraph 3.2.1). Remaining calendar days = number of vacation days in the year -(sum of all approved vacation days used in this employee's annual period + number of calendar days in this vacation record).
- i. Number of days of the current period filled in automatically, the number of vacation days involved in the current annual period of the employee.
- j. Future period day count filled in automatically, the number of vacation days involved in the future annual period of the employee.
- k. Calendar days remainder (future period) filled in automatically, the remaining calendar days in the current vacation period of the employee.
- The remaining number of unpaid vacations, days filled in automatically, the number of remaining days with unpaid leave in the current annual period. The remaining number of unpaid leave, days = Total number of unpaid leave, days - Number of calendar days.
- m. The total number of unpaid vacations, days the sum of previously agreed unpaid vacation days.

Vacation page view with the "Paid" type:

≡	• + <	Vacation: Stefan Snider 08	.07.2022 - 21.07.2022	What can I do for you?	> Creatio	0	
Sales	<b>-</b>	CLOSE ACTIONS -				VIEW 🕶	â
F	Activities	> Contact*	Draft	Approval	Done	-	
₹	Opportunities	Stefan Snider Vacation type*	NEXT STEPS (0) 🛯 🗲 📕	× 😋 🛪 😋		~	
Ē	Orders	Paid Created by	See 4. 7/0/2022	Sec. (as. 7/01/0000	64-44-44-44-44-44-44-44-44-44-44-44-44-4		
P	Contracts	Stefan Snider	Calendar day remainder	Future period day count 0	Calendar day count 14 Calendar days 24 remainder (future	1	
5	Invoices				period)		G
<b>\$</b>	Issue		< PRIMARY INFO ATTACHMENTS AN	ND NOTES FEED APPROVALS		>	0
hh	Documents		Vacation intervals				6
Ē	Products		Vacation		Count Year period		
2	Projects		21.07.2022		14 27.05.2022 - 26.05.2023		
	Knowledge base						
∰ <sup>¢;</sup>	Vacations						

Vacation page view with the "Unpaid" type:

≡	• + <	Vacation: Sam Davidson 11.07.2022 - 12.07.2022	Creatio	Q
Sales	÷	CLOSE ACTIONS - 4	VIEW -	â
F	Activities	Contact* Dreft Approval Done		
₹	Opportunities	Sam Davidson Vacation type*	~	
Ē	Orders	Unpaid Created by		
₽	Contracts	Start date 7/11/2022 End date 7/12/2022 Calendar day count 2		õ
1	Invoices	The total number of unpaid vacation, days 2 Unpaid vacation, days 0		G
٠	Issue	< PRIMARY INFO ATTACHMENTS AND NOTES FEED APPROVALS	>	ð
հհ	Documents	Vacation intervals + :		Õ
F	Products	No data		
7	Projects			
	Knowledge base			
Щ.	Vacations			

Vacation page view with the "Sick leave" type:

≡	• + <	Vacation: Stefan Snider 07	.07.2022 - 11.07.2022	What can I do for you?	Creatio	Q
Sales	-	CLOSE ACTIONS - 🔗			VIEW -	8
F	Activities	Contact*	Draft Annonval	Done		
₹	Opportunities	Stefan Snider	NEXT STEPS (0) 🐧 🔤 📕 🌾 🔕 🦪 🚳		~	
Ē	Orders	Sick leave				
₽	Contracts	Stefan Snider	Start date 7/1/2022 End date 7/11/2022	Calendar day count 5		
<b>(1</b> )	Invoices					C
<b></b>	Issue		C PRIMARY INFO ATTACHMENTS AND NOTES FEED APPROVALS		>	Ď
hh	Documents		Vacation intervals + :			0
G	Products		No data			
7	Projects					
	Knowledge base					
ф <sup>ф</sup>	Vacations					

4. Click the "Save" button.

**Note**: An employee's annual leave period can be found on the employee's record page under the 'Current employment' tab.

Sam Davidson		What can I do for y			
CLOSE ACTIONS -					
Eull name* Sam Davidson	You don't have any tasks yet Press F above to add a task				
Full job title	CINFO CONNECTED TO MAINTENANCE TIMELINE E	ENGAGEMENT COMMUNICATION CHANN	CURRENT EMPLOYMENT >		
Mobile phone	Job title Department	Full job title Role			
Business phone	Amount Of Vacation Days For The Current Period	Amount Of Vacations Day For The Future Period			
Email	Job experience + :				
	Account 🔨 Job title	Primary	Start date		
Account	Our company / 43	Yes	5/27/2022		
Our company / 43	Year period + :				
Our company	Name Description	From T	ō		
Owner	27.05.2024 - 26.05.2025	5/27/2024 5	5/26/2025		
Supervisor	27.05.2023 - 26.05.2024	5/27/2023 5	5/26/2024		
	27.05.2022 - 26.05.2023	5/27/2022 5	5/26/2023		

#### 2.2.2.2 Vacations approving

The vacation takes effect after the transition to the "Done" state.

After this change, the vacation record page will perform calculations. The system will fill in the calculated columns with data. The vacation period of this employee will also be formed, the record will be displayed on the "Vacation periods" detail.

The view of the vacation page with the "Paid" type. Only the current vacation period is involved:

≡	• + <	Vacation: Supervisor 07.07.2022 - 27.07.2022	Creatio	$(\mathfrak{O})$
Sales	-	CLOSE ACTIONS - 🖉	VIEW 🕶	8
F	Activities	Confact* Draft Approval Done		
₹	Opportunities	Supervisor NEXT STEPS (0) 🐛 🔟 📕 🖡 🙆 🛪 🚱	~	
Ē	Orders	Paid         Created by         Start date 7/7/2022         End date 7/27/2022         Calendar day count         21		
2	Contracts	Supervisor Calendar day remainder day out 0 Calendar days 24		
	Invoices			C
<b></b>	Issue	< PRIMARY INFO ATTACHMENTS AND NOTES FEED APPROVALS	>	0
hh	Documents	Vacation intervals + :		6
	Products	Vacation Count Year period		
ľ	Projects			
	Knowledge base			
Щ¢:	Vacations			

The view of the vacation page with the "Paid" type. The current and future vacation period is involved:

≡	• + <	Vacation: Supervisor 01.08	.2022 - 15.08.2022	W	nat can l do for you?	>	Creatio 8.0.1.1990	$\bigcirc$
Sales	-	CLOSE ACTIONS -					VIEW -	8
F	Activities	Contact*	Draft Approval		Done			
Ŧ	Opportunities	Supervisor Vacation type*	NEXT STEPS (0) 😋 📮 🖡 🙆 🖪 🕲				~	
Ē	Orders	Paid Created by	Start date 8/1/2022 Envi date 8/15/2022		Calendar day count	15		
₽	Contracts	Supervisor	Calendar day environment of Future period day count 3		Calendar days remainder (future	21		
<b>E</b> (1)	Invoices				period)			C
<b>\$</b>	Issue		PRIMARY INFO ATTACHMENTS AND NOTES FEED APPROVALS				>	0
hh	Documents		Vacation intervals + :					0
F	Products	Current period	Vacation Vac	Count	Year period			
2	Projects	Future period	Vacation: Supervisor 01.08.2022 - 15.08.2022	3	01.05.2023 - 30.04.2024			
	Knowledge base							
∰ <sup>`</sup>	Vacations							

The system works in a way that it firstly fills in the last annual vacation period. After that, the current year period. And if there are not enough days from the current one, then it goes to the reserve value of days from the future annual period.

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