CONFERO

ServicePoint for Creatio

Add-on providing registration of user requests

Version 1.0

Admin's Manual

List of Contents

1.   Introduction

Application ServicePoint for Creatio is supplied in .zip file containing all the necessary packages. Installation is carried out from section Installation; deletion of the application is carried out in System designer. Future updates will be supplied as separate packages to be installed through console.

After installation, in sections Lookups and System settings in System designer, static group Document services is created. It contains lookups and settings necessary for the solution to function. Some lookups and settings will be filled in with demo values by default.

Detailed description of system settings and lookups designed for ServicePoint for Creatio is provided in this admin's manual.

Learn more about basic functionality of Creatio on company's website: https://marketplace.creatio.com/

2. Lookups

The Lookups section is designed to manage ServicePoint for Creatio lookups. You can also edit existing lookups and register the new ones in this section.

To access the section, open the system designer by clicking the ⚙ button in the top right corner of the application. In the System setup block, click the Lookups link.

Lookups for ServicePoint for Creatio are grouped in a separate branch. The folder is named according to sections: Document services.

Attention
When you edit the content of lookups, do not delete basic content, as this can lead to incorrect operation of pre-configured business processes.

When a lookup is selected in the section, on the top of the standard options, some additional options are available:

- Open content – opens a page for editing the content of a lookup 2.1.
- Open settings — opens a page for editing the lookup settings specified when registering a lookup **Error! Reference source not found.**.

2.1. Lookup content page

A special window is used to view and edit lookup records. To open this page, select a lookup in the list and click the Open content button.

Most system lookups are standard and contain only the [Name] and [Description] fields. Certain custom lookups have record edit pages.

You can modify the content in the most lookups in the editable list (Image. 1).
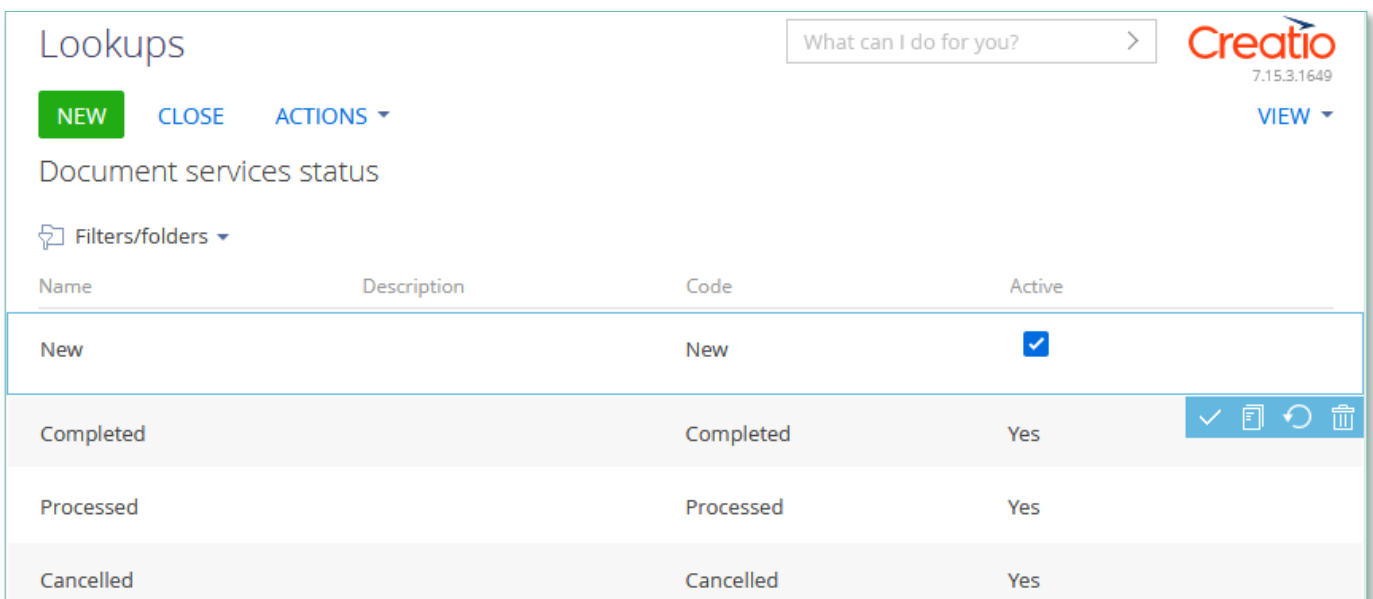

Image. 1. Saving changes in a lookup list of records

You can deactivate lookup values to prevent the users from selecting these values in the future. Deactivated values will not be available for selection in the corresponding lookup fields. All existing records where an inactive lookup value had been previously set will remain unchanged.

2.2.   Lookup settings page

Use the lookup settings page to add or change settings of existing lookups. To open this page, select a lookup in the list and click the Open settings button.

Field	Description
Name	Lookup name
Object	Object that contains the structure of lookup content. For example, in the registration card of the Normative document levels of confidentiality lookup, the Normative document levels of confidentiality object is specified in this field. The lookup of this field contains items of the "Object" type.
List page	Page schema used for editing the content of the lookup. If this field is not populated, the standard lookup content page will be used.
Description	Description of the lookup, e.g., its purpose and function.

2.3.   List of lookups

The system contains several principal configurable lookups, which are used upon filling in the document.

Lookup	Description
Tab Document services	
Document services origin	Standard lookup Contains fields: Name, Description, Code, Active
Document services types	Standard lookup Contains fields: Name, Mail box, Code, Default assignee group, Active For every type of request, there should be a separate email address created; upon receiving a letter on the respective email, the query of the appropriate type is generated
Document services status	Standard lookup Contains fields: Name, Description, Code, Active
Characteristics in document services type	Standard lookup Contains fields: Name, Description, Add as default Upon creating a new request, there is an option to add characteristics automatically: • if the lookup settings contain a tick in box "Yes" in column "Add by default" • and field Document service type is filled in

2.4.   Description of non-standard lookups

This chapter describes the non-standard lookups used in ServicePoint for Creatio.

Email templates lookup

The [Email templates] lookup is used to create email templates for business processes and customer communications.

Field	Description
Template name	The title of a template. The field is required. In localized templates, the template name is followed by abbreviations of the used languages.
Macro source	System object (section or detail), whose fields will be used in the template as macros.
Template area	The template displays the template text If the template is localized, different tabs are used to display its text in different languages.

The ⚙️ button in the top right area of the template enables adding new language tabs.

Each tab contains:
- [Edit] button, which is used for opening the content designer;
- [Subject] field. This field value is automatically populated in the Subject field of the message page, when you select a bulk email (in Creatio marketing) or a lookup template.
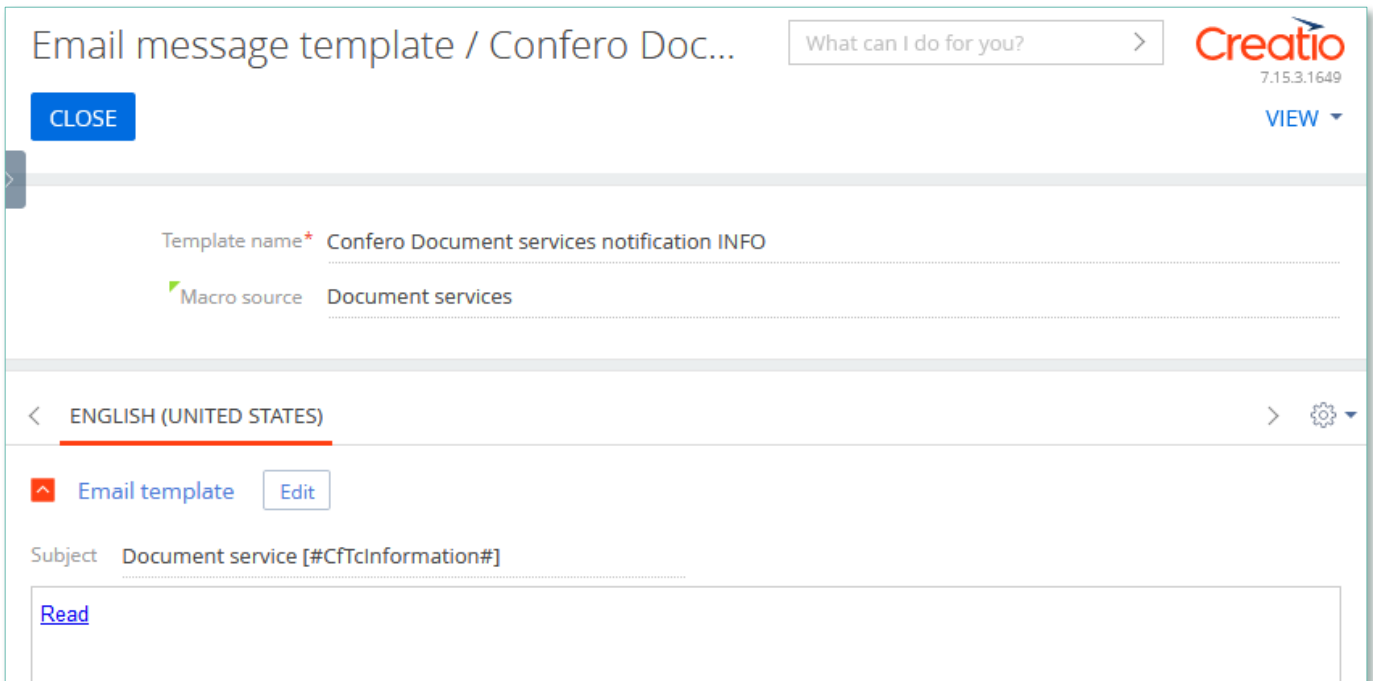

Image. 2. Template orts responsible control date notification INFO

Product ServicePoint for Creatio is using several templates to create body text for emailing.

Template	Subject
Confero Document services notification INFO (US, RU)	Document service [#CfTcInformation#]

3. Section System settings

The System settings section is designed for managing additional Creatio settings. For example, here you can assign a color for the section panels, select the base currency for calculating the Creatio financial indicators, specify parameters for sending emails, etc.

With the help of system settings, you can also specify default values for various fields when new records are created, like a default activity status, for example.

To access the section, open the system designer by clicking the ⚙ button in the top right corner of the application. Click the [System settings] link in the [System setup] block.

3.1. System setting page

To register a system setting, use the system setting page.

Field	Description
Name	The [Name] field shows the title of the system setting that will display to users.
Type	System setting field type. The type of field defines the method of filling in the value of system setting. This field is editable while adding a new system setting and is non-editable for the previously registered records.
Default value	Use this field to set the value for the system setting. For example, you can set the "Not Started" value for the activity default status, or "5 minutes" value as an interval for notification check. The method of filling in the Value field depends on the type of system setting. For example, activity default status can be selected from the Activity statuses lookup, while the interval for notification check is specified as an integer number.
Code	The code is used for the unique designation of the system setting to identify it in the system. The field value can consist of Latin letters and numbers only and must not contain spaces.
Cached	Select the [Cached] checkbox if the value of the system setting changes relatively rarely and thus must be calculated only once per user session. Examples of cached system settings could be the main menu logo or login page colour of overdue activities or base currency settings.
Personal	Select this checkbox to have the system setting be configured for the current user individually.
Allow for portal user	Select this checkbox to make the system setting available for the portal users.

3.2. List of system settings

The system contains several system settings used for filling in a document in ServicePoint for Creatio. The settings for ServicePoint for Creatio are grouped in a separate branch. The folder is named in accordance with the section: Document services.

Name	Code	Note
Tab Document services		
Mailbox for document services	CfTcDocumentServicesMailbox	Setting from lookup
Document services last number	CfTcDocumentServicesLastNumber	Counting number
Document services email box	CfTcDocumentServicesEmailbox	Value by default
Document services code mask	CfTcDocumentServicesCodeMask	Format of the code of document service {0}

4. Attributing access rights according to Assignee Group

In system settings in section Users and administration in subsection Organizational roles there is a tree-type organizational structure of the company consisting of the organizational roles, as well as information about chosen organizational role. All users belonging to this organizational role inherit the access rights set up for this role.
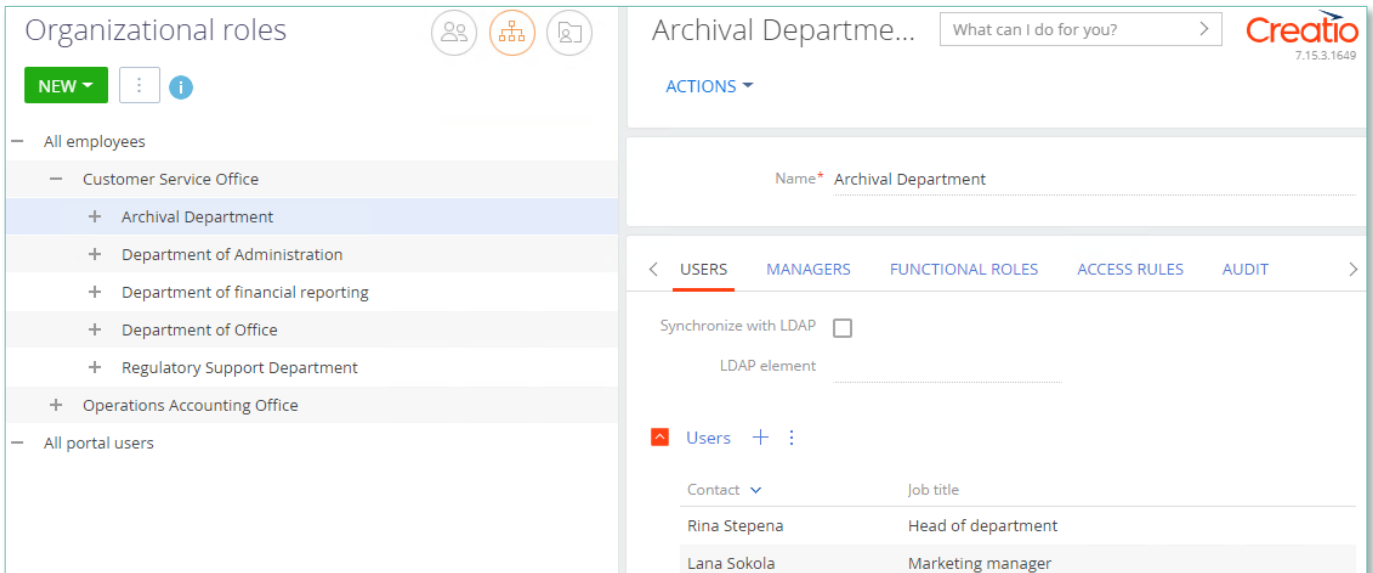

Image 3. Setup of Organizational role

Then in order for the Organizational role to be displayed in field Assignee group, one should set value Yes in columns "Is manager group" and "Is responsible department" in lookup System administration object usage.
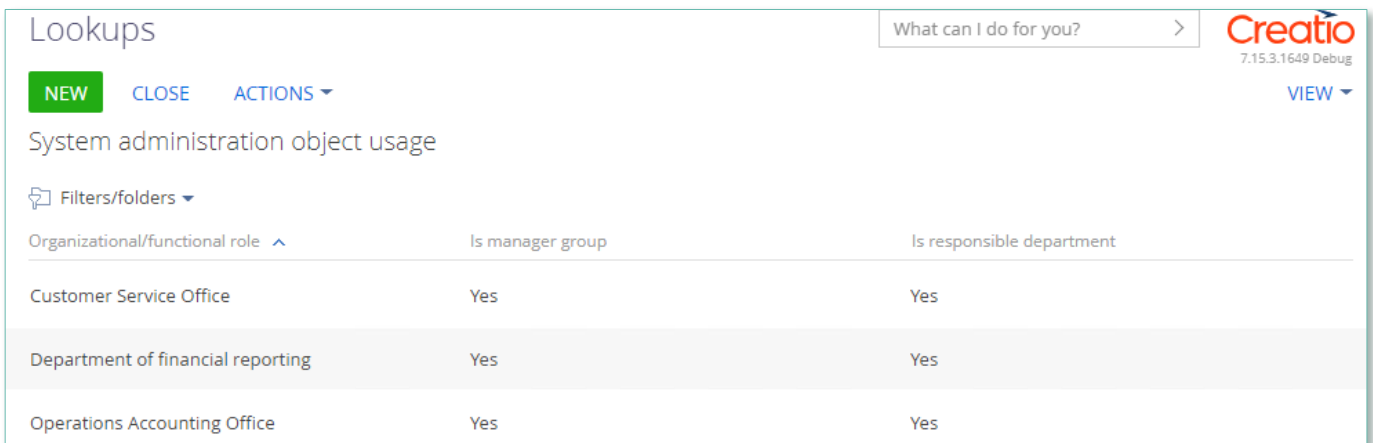
Image 4. Setup of System administration object usage

Access rights to a particular Document service can be reassigned in the course of execution process.

Image 5. Document service request form

Upon changing the Assignee group, the access rights to the Document service request will automatically change. The new Assignee group for executing the document service is entered on the detail Edit and Delete, and the rights of the previous group are deleted, leaving it with reading rights only.

Image 6. Setup of access rights to Document service

Also all employees from the new Assignee group receive notification by email about that they are not in charge of execution of the document service.