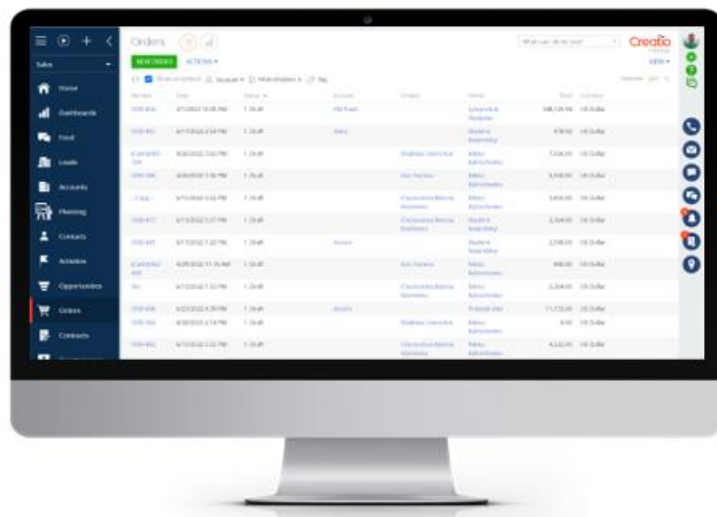




TEXT FIELD AUTOFILL FOR CREATIO



Guide
to setup and utilization

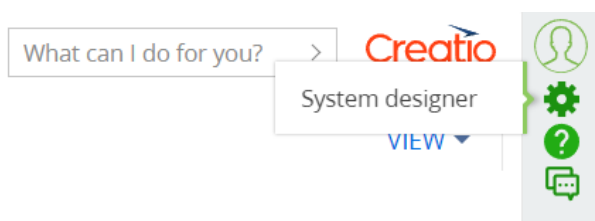
1. Functionality description

The "String formation settings" module allows you to create a string mask from the fields of an object.

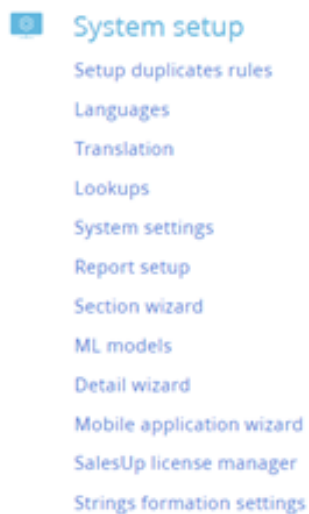
For example, you can create a mask for an order number, a request, notes, or the name of a record in the registry section using the columns such as account, date, amount, etc. or any values entered manually. In addition, the specified line template in the module has a higher priority than the system setting: if the order number template is specified in the module it will have priority over the template specified in the system settings.

1.1 Creating a new string setting

After installing the module, to create a new string formation setting, go to the System Designer (1) and in the System Settings menu, select Strings formation settings (Picture 1.2), then click "New" (Picture 1.3):

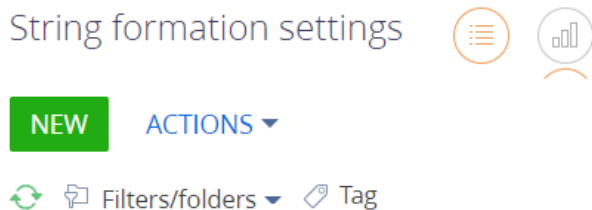


Picture 1.1



Picture 1.2



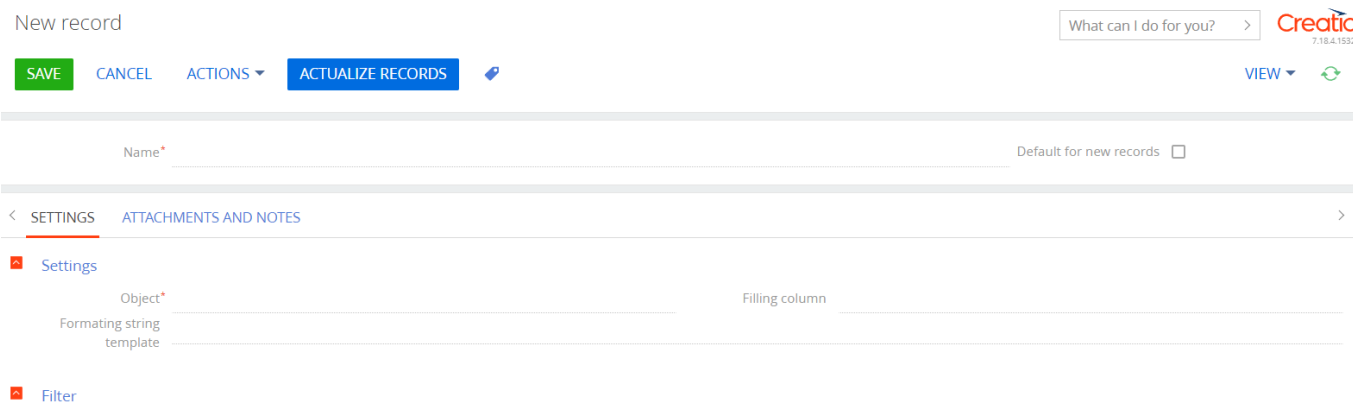


Picture 1.3

1.2 Filling in a page profile with data

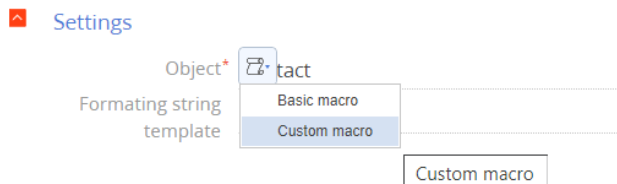
To create a line formation setting, fill in the fields on the page (Picture 1.4) in the following way:

1. Name – specify the name of the current setting;
2. Object – specify the section to which you want to apply the setting;
3. Filling column – specify the name of the column in which the configured string will be displayed;
4. Formating string template – in this field the mask of our line is set. Can be filled with both text and macro at the same time;



Picture 1.4

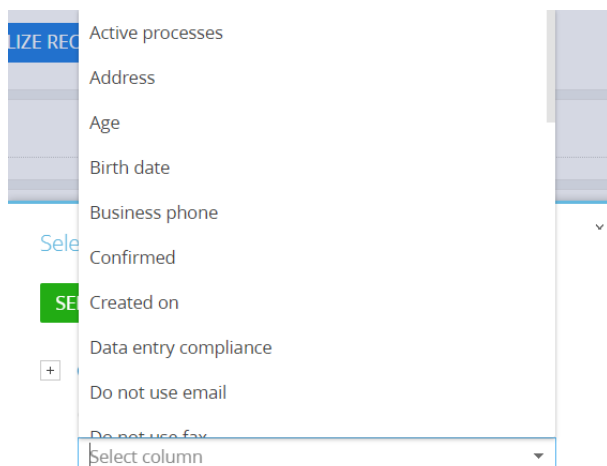
The generated string template consists of macros (Picture 1.5).



Picture 1.5

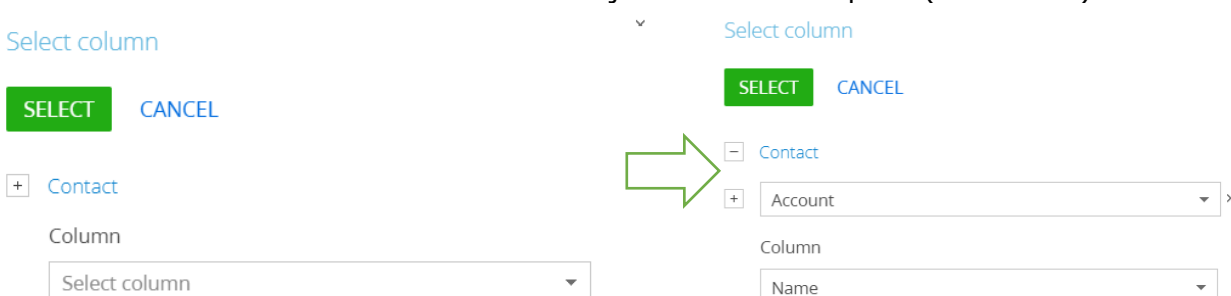


When adding each macro, a selection window opens (Picture 1.6). Please note that you can add any columns other than reference ones.



Picture 1.6

You can also extract names from related objects into the template (Picture 1.7).



Picture 1.7

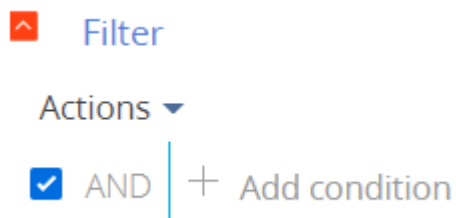
To ensure flexibility and convenience of use in the "Template of the generated line" field, you can add text and change the order of macros through the functions of the Cut-Paste context menu, without reopening the selection window (Fig. 1.8).

1.3 Filters setup

The filtering block is designed to select parameters, designate conditions. For all records that will match the filtering conditions, the value of the selected column of the object will be updated in accordance with the specified template. The module uses the standard advanced filtering functionality with all available actions. [Detailed instructions for working with filters can be found at Creatio Academy.](#)

To set up a filtering condition, press <Add condition> (Picture 1.8):





Picture 1.8

In the window that opens, in the "Column" field, select a needed column for the object, for example, "Payment type", and click the "Select" button (Picture 1.9):

Select column

SELECT CANCEL

+ Order

Column

Payment type

Picture 1.9

In the window that opens, select values from the lookup, specify the necessary parameters, for example, "Non-cash payment" (Picture 1.10):

Select: Payment type



SELECT CANCEL ACTIONS

Records selected: 0 VIEW

Name | SEARCH

Name

- Cash payment upon delivery
- Non-cash payment

Picture 1.10

Thus, taking into account the filtering conditions, new records with the payment type - Non-cash payment, will be assigned an updated number specified in the Generated string template field



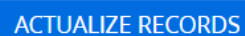
1.4 Saving and editing string setting

A blue rectangular button with the word "SAVE" in white capital letters.

To save the line settings on the toolbar, click the "Save" button

After that, the corresponding column in the section will be filled according to the given template

In order to edit the line setting, after making changes, click on the "Actualize records" button:

A blue rectangular button with the text "ACTUALIZE RECORDS" in white capital letters.

Only after that, the edits will be displayed in the column.

