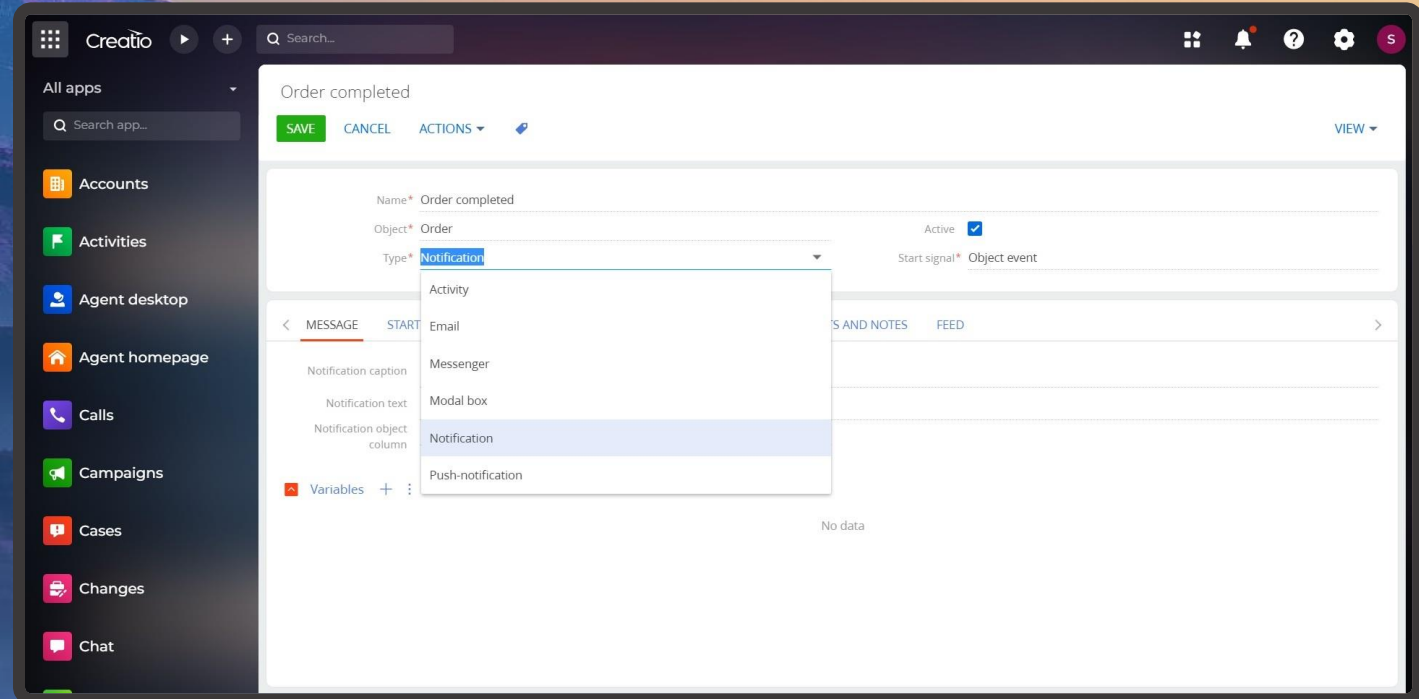


Sales'Up Multichannel notifications for Creatio

Take notification management to the next level
January 10th, 2024

Sales'Up Multichannel Notifications for Creatio is a product that helps to automate the sending of notifications to participants of business processes in the system and beyond using various communication channels - messengers, e-mail, system notifications, PUSH messages to mobile devices.

The product integrates with other Sales'Up products, supports multilingual creation of message templates and has extensive capabilities in CRM. It is used to improve the efficiency of business process management in various scenarios.



The screenshot displays the Creatio user interface for configuring a notification. The left sidebar lists various applications: Accounts, Activities, Agent desktop, Agent homepage, Calls, Campaigns, Cases, Changes, and Chat. The main panel is titled "Order completed" and includes a "SAVE" button, "CANCEL" button, and "ACTIONS" dropdown. The configuration fields are as follows:

- Name*: Order completed
- Object*: Order
- Type*: Notification (with a dropdown menu open showing options: Activity, Email, Messenger, Modal box, Notification, and Push-notification)
- Active:
- Start signal*: Object event

Below the configuration fields, there are tabs for "MESSAGE" and "START". The "MESSAGE" tab is active, showing fields for "Notification caption" (set to "Messenger"), "Notification text" (set to "Modal box"), and "Notification object column" (set to "Notification"). A "Variables" section is also visible. The bottom of the panel shows "No data".

Main advantages of Sales'Up Multichannel notifications for Creatio:

- **Easy tracking of important management accounting indicators:**

You can quickly view and analyze key metrics such as costs, profit and sales without having to log in.

- **Ability for CRM analysts to configure interaction rules:**

The analyst can configure the automatic creation of tasks for managers under certain conditions, simplifying their work. At the same time, there is no need to involve a developer in setting it up.

- **Increasing the efficiency of response to events:**

If a negative situation occurs, such as a cost overrun, the system sends an immediate alert so you can take quick action.

- **Sending messages to messengers:**

Notifications from the Creatio system can be sent to messengers. Thus, if the working chats of employees are in some messenger, for example, in Telegram, sending notifications to the same messenger will simplify the process of receiving, processing and searching for information.

- **Help in organizing working hours and communication between employees:**

Scheduling meetings, reminders of important events and working together on projects become more efficient.

- **Sending "PUSH" messages for mobile devices:**

Receive instant notifications of new tasks or important events even outside the office.

- **Support for multilingual creation of message templates:**

Creation of adapted templates for different languages of communication with customers all over the world.

- **Flexible logic for creating a list of recipients:**

Selecting a group of recipients for specific messages, avoiding sending redundant notifications.

- **Creating drafts of letters with filled data and editing before sending:**

Convenient preparation of letter templates for various communication scenarios.

- **Convenience and speed of setup:**

Creation of an unlimited number of notifications for the same object without overloading the system and ease of settings without the involvement of a developer.

Main features and utilization options

Versatility of application:

Accounting control management :

- Tracking important indicators of management accounting and receiving notifications when the specified limits are exceeded.

Optimizing communication and working hours:

- Contributes to the improvement of communication between employees of different levels and departments, as well as the organization of working hours.

The screenshot displays the Creatio application interface. On the left is a dark sidebar with a list of applications: Accounts, Activities, Agent desktop, Agent homepage, Calls, Campaigns, Cases, Changes, and Chat. The main area is titled 'Order completed' and contains configuration options: Name* Order completed, Object* Order, Type* Notification, Active , and Start signal* Object event. Below this is a navigation bar with tabs: MESSAGE, START SIGNAL (selected), RECIPIENTS, NOTIFICATIONS, LOGS, ATTACHMENTS AND NOTES, and FEED. The 'START SIGNAL' tab is active, showing a filter rule: Status = 4. Completed. Below the filter, there are checkboxes for 'Object event' (On record create and On record update) and 'Changed columns'. At the bottom, a table lists notification settings:

Notification setting	Column name	Column caption
Order completed	Status	Status

Versatility of application:

Mobility and Push Notifications:

- Mobile messaging via PUSH notifications for effective engagement with mobile users.

Integrations with other Sales'Up products:

- Use of integrations with other products, for example, "Sales'Up Data Management for Creatio", "Sales'Up Approval for Creatio", for a comprehensive solution of business tasks.

The screenshot displays the Creatio user interface for configuring a notification. The left sidebar lists various applications: Accounts, Activities, Agent desktop, Agent homepage, Calls, Campaigns, Cases, Changes, and Chat. The main content area is titled 'Order completed' and includes a search bar, 'SAVE', 'CANCEL', and 'ACTIONS' buttons. The configuration fields are as follows:

- Name*: Order completed
- Object*: Order
- Type*: Notification
- Active:
- Start signal*: Object event (with a dropdown menu open showing options: Date from object column, Manual start, Object event, Page event, and Timer)

Below these fields are tabs for MESSAGE, START SIGNAL, RECIPIENTS, NOTIFICATIONS, LOGS, ATTACHMENTS AND NOTES, and FEED. The 'START SIGNAL' tab is active and shows a filter rule:

- Filter: Status = 4. Completed
- AND: Add condition
- Object event: On record create On record update
- Changed columns: + ;

At the bottom, a table lists notification settings:

Notification setting	Column name	Column caption
Order completed	Status	Status

Versatility of application:

Flexible logic for creating a list of recipients:

- Setting flexible rules for forming a list of recipients, with the possibility of exclusions and individual customization.

Creating templates and system messages:

- Development of letter templates for newsletters, system and pop-up messages in the middle of Creatio for effective communication.

Order completed

SAVE CANCEL ACTIONS VIEW

Name* Order completed
Object* Order Active
Type* Notification Start signal* Object event

< MESSAGE START SIGNAL RECIPIENTS NOTIFICATIONS LOGS ATTACHMENTS AND NOTES FEED

Filter
Actions
 Status = 4. Completed
 AND
+ Add condition

Object event
On record create On record update

Changed columns + ;

Notification setting	Column name	Column caption
Order completed	Status	Status

Versatility of application:

Newsletters by timer and events:

- Creation of newsletters on a timer or according to events in the system to automatically inform users.

Order completed

SAVE CANCEL ACTIONS

VIEW

Name* Order completed

Object* Order Active

Type* Notification Start signal* Object event

MESSAGE START SIGNAL RECIPIENTS NOTIFICATIONS LOGS ATTACHMENTS AND NOTES FEED

Filter

Actions

Status = 4. Completed

AND + Add condition

Object event

On record create On record update

Changed columns + :

Notification setting	Column name	Column caption
Order completed	Status	Status

Opportunities:

- Setting up notifications for a certain date in the system for relevant objects;
- Setting up soft-collection and hard-collection workflows;
- Setting up notifications to contacts and system users about the order fulfillment process, expiration of documents, etc.;
- Flexibility to set up filters for sending e-mails and messages;

The screenshot displays the Creatio user interface for configuring a notification. The main window is titled "Daily report by Apex Solutions" and includes a search bar and navigation buttons (SAVE, CANCEL, ACTIONS, VIEW). The configuration fields are as follows:

- Name: Daily report by Apex Solutions
- Object: Case
- Type: Messenger
- Active:
- Start signal: Timer (selected from a dropdown menu)

The dropdown menu for "Start signal" shows the following options: Date from object column, Manual start, Object event, Page event, and Timer.

Below the configuration fields, there is a "Filter" section with the following rules:

- Account = Apex Solutions
- Registration date = Today
- Assignees group is filled in

These rules are combined using logical operators:

- AND: Assignee = Jason Robinson
- AND: Assignee = John Best
- OR: Assignee = William Walker

Opportunities:

- Settings for sending summary notifications to the messenger or to e-mail at the exact time;
- Setting the multilingual title and text of the notification;
- Setting up push notifications for the Creatio mobile application;
- Analytics for notifications;

The screenshot displays the Creatio user interface for configuring a notification. The main window is titled "Order completed" and includes a "CLOSE" button and a "VIEW" dropdown. The configuration fields are as follows:

Name*	Order completed		
Object*	Order	Active	<input checked="" type="checkbox"/>
Type*	Notification	Start signal*	Object event

Below the fields, there are tabs for "MESSAGE", "START SIGNAL", "RECIPIENTS", "NOTIFICATIONS", "LOGS", "ATTACHMENTS AND NOTES", and "FEED". The "MESSAGE" tab is active, showing the following configuration:

Notification caption	Order [#Number#] for [#Account.Name#] has been completed by [#Owner.Name#]
Notification text	Order [#Number#] for [#Account.Name#] has been completed by [#Owner.Name#]
Notification object column	

At the bottom, there is a "Variables" section with a plus sign and a "No data" message.

The left sidebar shows a list of applications: Accounts, Activities, Agent desktop, Agent homepage, Calls, Campaigns, Cases, Changes, and Chat. The right sidebar shows "System messages" with a notification: "Today at 8:45 AM Orders Order ORD-15 for Apex Solutions has been completed by Mary King".

Examples of industry usage of Sales'Up Multichannel notifications for Creatio

Retail

- Reminding the managers responsible for the account about the expiration of the contract;
- Sending daily, weekly, monthly notifications to managers about overdue activities of sales representatives;
- Informing sales representatives about the existence of receivables from the account;
- Notification of the availability of new unprocessed leads;
- Informing customers about the presence of unpaid bills and the need to pay them;
- Informing sales representatives and sales managers about the lack of goods in stock or the expansion of the range of goods

Financial institutions

- Reminding responsible managers about the expiration of the contract with the client;
- Sending notifications to clients about changes in the status of financial transactions - credit applications, transactions, investment transactions;
- Informing employees about new applications, appeals, customer requests;
- Notification of the creation of a mass number of appeals in a certain direction in a short period of time;
- Informing and blocking the possibility of accepting an application or applying for a job without the full amount of data from the client;
- Informing managers responsible for applications or contacting employees about a delayed response to a client's request.

IT companies

- Informing employees of various departments about important events, for example, developers about the creation of a new task, testers about the completion of a task by a developer, analysts about the end of testing, etc.;
- Informing department heads about completed or overdue tasks within a certain period;
- Automatic sending of reports to managers on the results of the work performed and financial indicators;
- Notifying employees about new regulations, documents, knowledge base articles;
- Reminding sales managers about the expiration of the contract with the client;

Settings for sending an email:

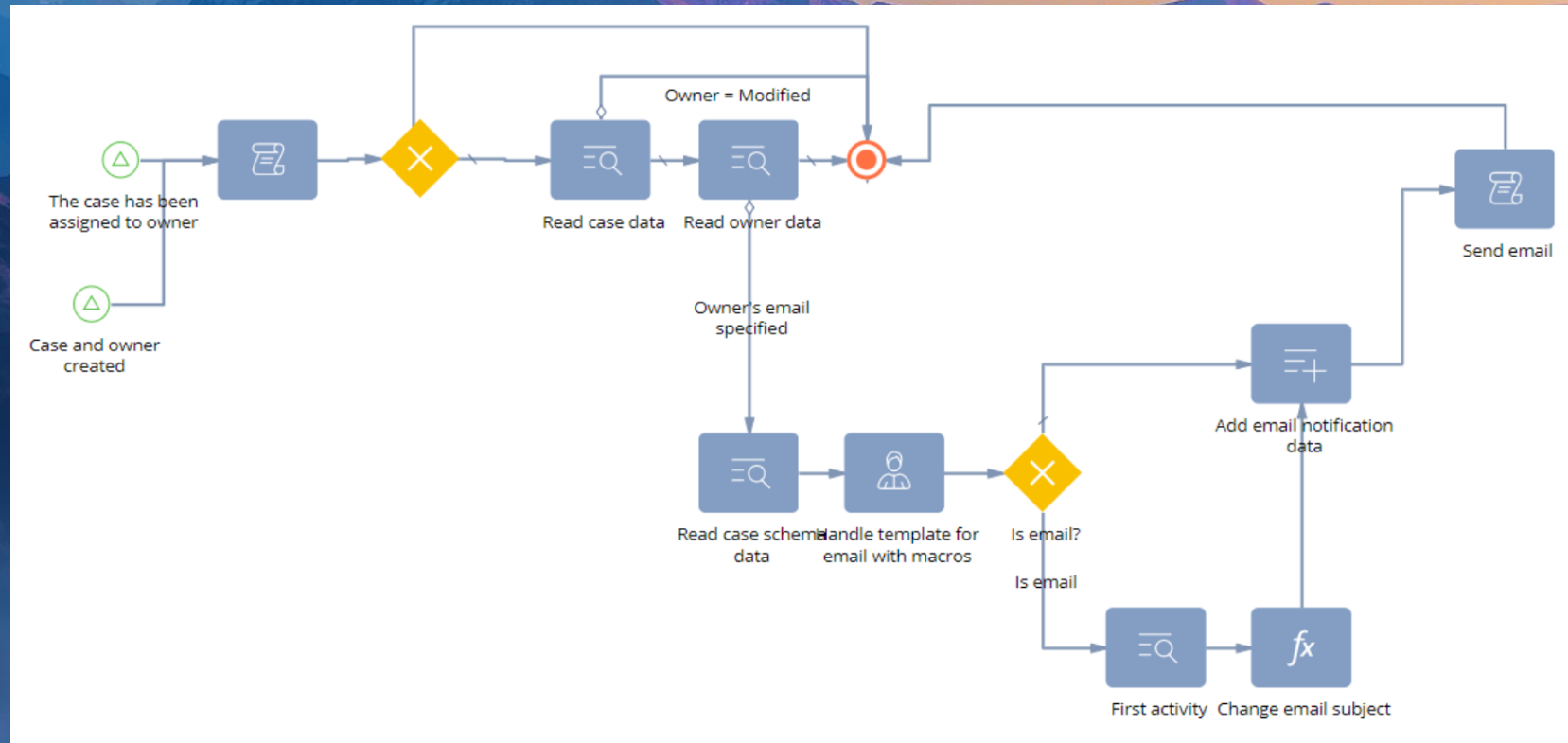
Send an automatic email to the employee designated as responsible for the request, provided that the employee was nominated by one of his colleagues

The screenshot displays the Creatio user interface for configuring a notification. The left sidebar shows navigation options: Contacts, Multichannel message templates, Multichannel bulk messages, Campaigns, Notification settings (highlighted), and Message templates. The main content area is titled 'Case assignee' and includes a search bar, 'CLOSE' button, and 'ACTIONS' dropdown. Below this, there are tabs for MESSAGE, START SIGNAL (active), RECIPIENTS, NOTIFICATIONS, and LOGS. The 'START SIGNAL' tab is expanded, showing a 'Filter' section with two conditions: 'Assignee is filled in' and 'Assignee = Owner', both checked and connected by an 'AND' operator. Below the filter, there are 'Object event' settings with 'On record create' and 'On record update' both checked. A 'Changed columns' section shows a table with 'Owner' and 'Holder' columns. At the bottom, 'Additional settings' includes an 'Async' checkbox which is unchecked.

Column	Column name
Owner	Holder

Setup time of a notification using **Sales'Up Multichanel notifications for Creatio** - 30 minutes.

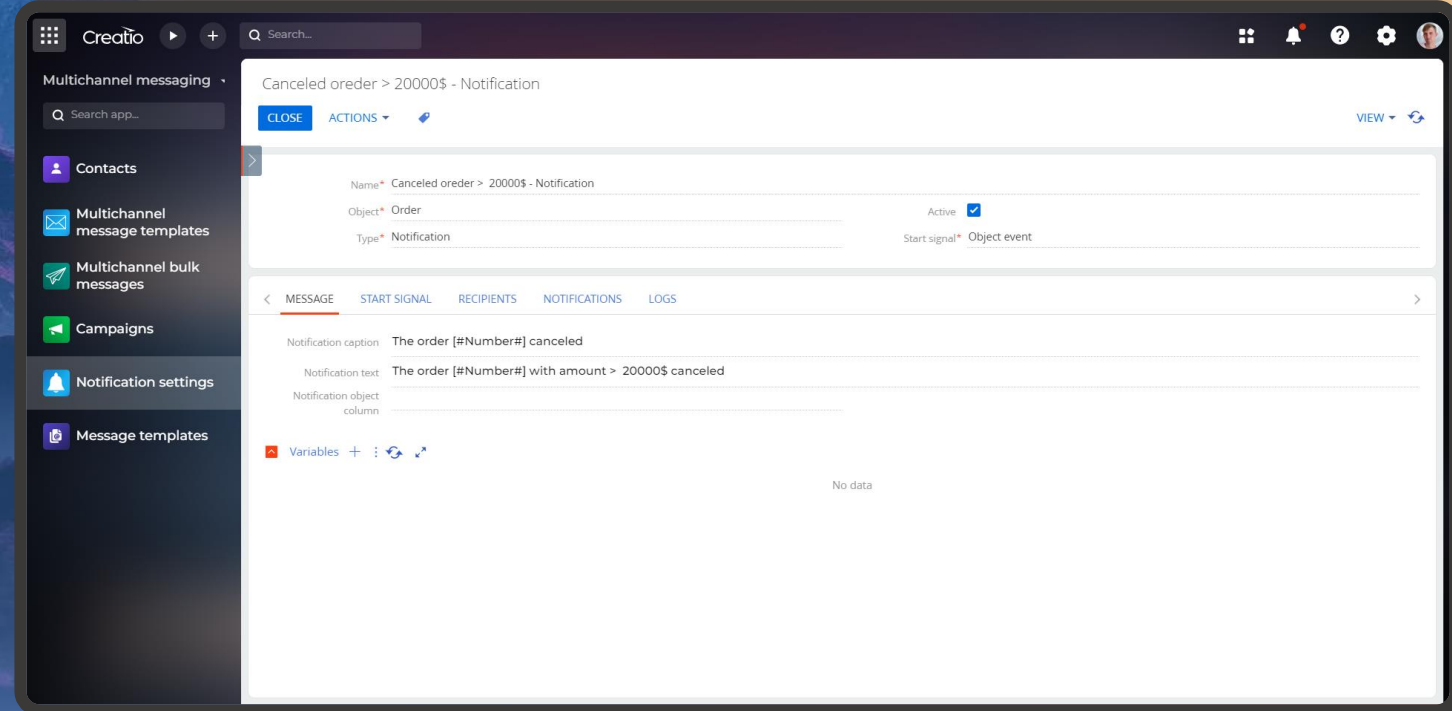
Setting up the process of sending an email to the user responsible for the request through Creatio business processes:



Setup time using the business process – 4 hours

Setting up the process of sending a notification to the communication panel:

Send notifications to the communication panel for the person responsible for the order for the amount of \$20,000.



The screenshot displays the Creatio user interface for configuring a notification. The left sidebar contains navigation options: Multichannel messaging, Contacts, Multichannel message templates, Multichannel bulk messages, Campaigns, Notification settings, and Message templates. The main content area shows the configuration for a notification titled "Canceled order > 20000\$ - Notification".

Configuration details:

- Name: Canceled order > 20000\$ - Notification
- Object: Order
- Type: Notification
- Active:
- Start signal: Object event

Notification content configuration:

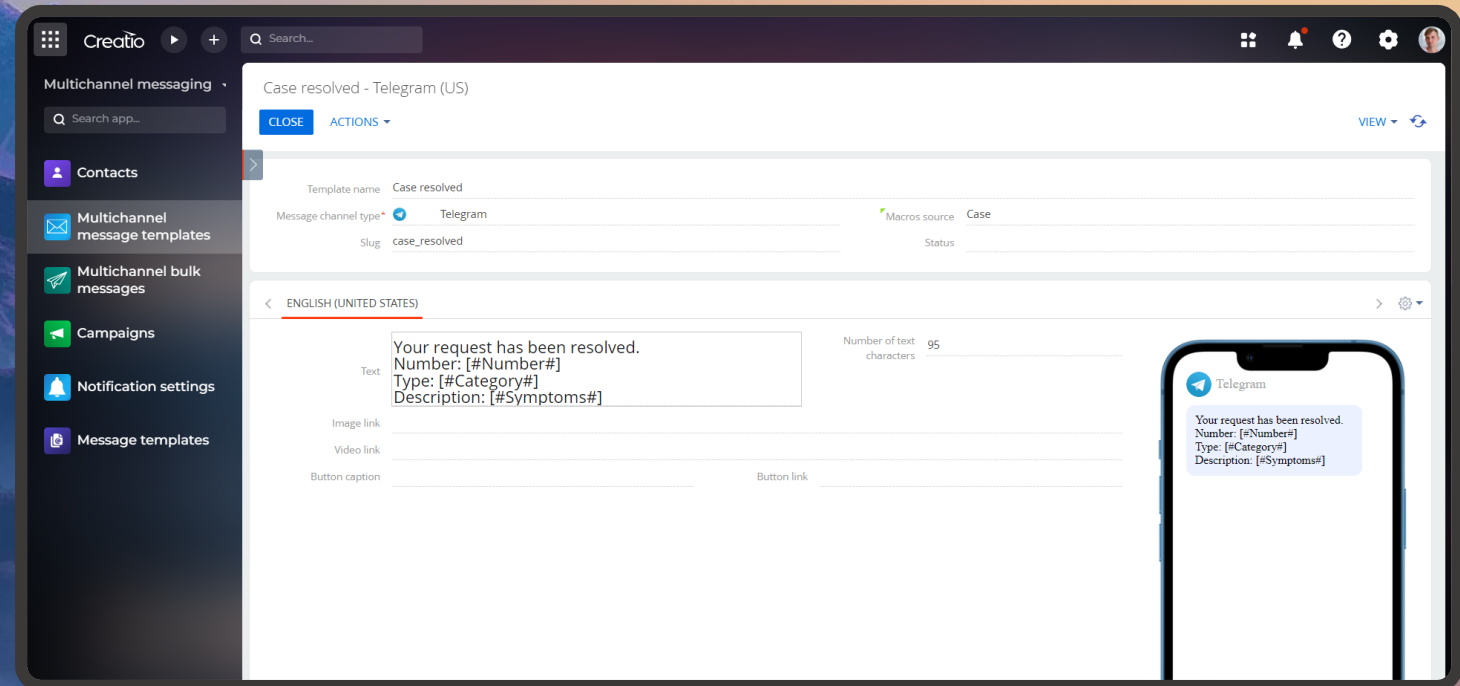
- Notification caption: The order [#Number#] canceled
- Notification text: The order [#Number#] with amount > 20000\$ canceled
- Notification object column: (empty)

Variables section shows "No data".

Setup time of a notification using **Sales'Up Multichannel notifications for Creatio** – 20 minutes.

Setting up the process of sending a notification to the Telegram messenger:

Send a notification in Telegram to the contact in the appeal about the resolution of the appeal by the person in charge.



Setup time with **Sales'Up Multichannel notifications for Creatio** - 40 minutes.

Notification settings in the form of a modal window:

Limit the saving of the contract without the specified contract amount by displaying a pop-up to the current user asking to fill in the amount.

The screenshot shows a modal window titled "Approving contract sum is empty" within the Creatio interface. The window has a dark header with the Creatio logo, a search bar, and navigation icons. A sidebar on the left lists menu items: "Contacts", "Multichannel message templates", "Multichannel bulk messages", "Campaigns", "Notification settings", and "Message templates". The main content area contains a form with the following fields:

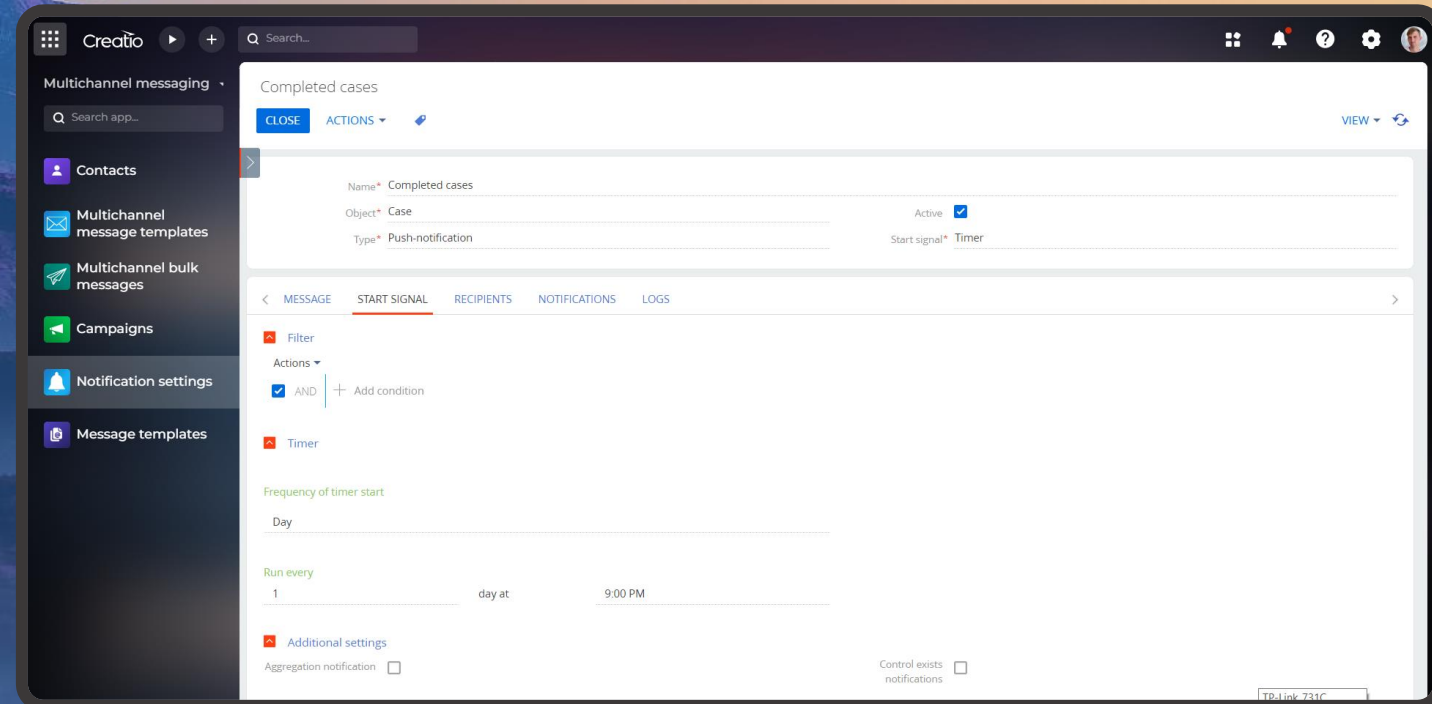
- Name: Approving contract sum is empty
- Object: Contract
- Type: Modal box
- Active:
- Start signal: Page event

Below the form is a tabbed interface with tabs for "MESSAGE", "START SIGNAL", "RECIPIENTS", "NOTIFICATIONS", and "LOGS". The "NOTIFICATIONS" tab is active, showing a "Notification text" field with the value "Fill in the contract amount". Below this is a "Variables" section with a plus sign and a refresh icon, and a "No data" message.

Setup time with **Sales'Up Multichannel notifications for Creatio** - 20 minutes.

Settings for sending PUSH notifications:

In the event of a delay in response to a high-priority appeal, send a PUSH notification to the head of the responsible group.



The screenshot displays the Creatio interface for configuring a push notification. The notification is named "Completed cases" and is active. The object is "Case" and the type is "Push-notification". The start signal is set to a timer. The timer is configured to run every 1 day at 9:00 PM. The notification is configured to run every 1 day at 9:00 PM. The notification is configured to run every 1 day at 9:00 PM.

Setup time with **Sales'Up Multichannel notifications for Creatio** - 20 minutes.

Automatic activity creation:

When adding a new regulation in the system, create an activity for all users with a request to familiarize themselves.

Created a new document, please read it

NAME* Created a new document, please read it
OBJECT* Document
TYPE* Activity
Active
Start signal* Object event

MESSAGE START SIGNAL RECIPIENTS NOTIFICATIONS LOGS

Activity title Read a new created document [#Name#]

Activity columns values + : : ↺ ↻

Activity column	Object column	Lookup value	Number value	Current date/t...	Offset	Offset unit
Priority		Low	0.00	No	0	
Start			0.00	Yes	0	
Category		To do	0.00	No	0	
Show in calendar			0.00	No	0	
Account		Our company SalesUp Demo	0.00	No	0	
Due			0.00	Yes	15	Minute

Variables + : : ↺ ↻

No data

Setup time with **Sales'Up Multichannel notifications for Creatio** -
20 minutes.

WHAT'S NEW

Advanced messaging channels

- All channels of the "Multichannel Bulk Messaging" product are now available for sending notifications, including Telegram, WhatsApp, SMS, Push, Facebook and Instagram.
- Telegram now supports sending images and buttons using macros for advanced notification customization.

Simplifying localization

- A new mechanism for configuring the localization of notification templates.
- No more switching between different environments to set up notifications in different languages.

Single access to channels

- Channels available in Multichannel Bulk Messaging are also available in Multichannel Notifications, eliminating the need for separate settings.

Freedom UI improvements

- The Freedom UI now includes advanced functionality such as modal windows when opening pages, saving, and validating.
- Storage related issues can also be resolved in the Freedom UI.

THANK YOU!

CONTACT US:

salesup-it.com

care@salesup-it.com

