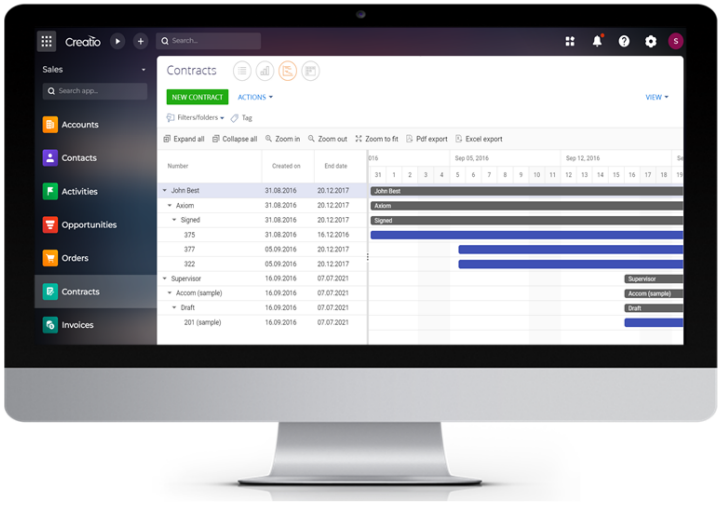
SALES'UP DATA VIEWS FOR CREATIO



Guide to setup and utilization

21.07.2023

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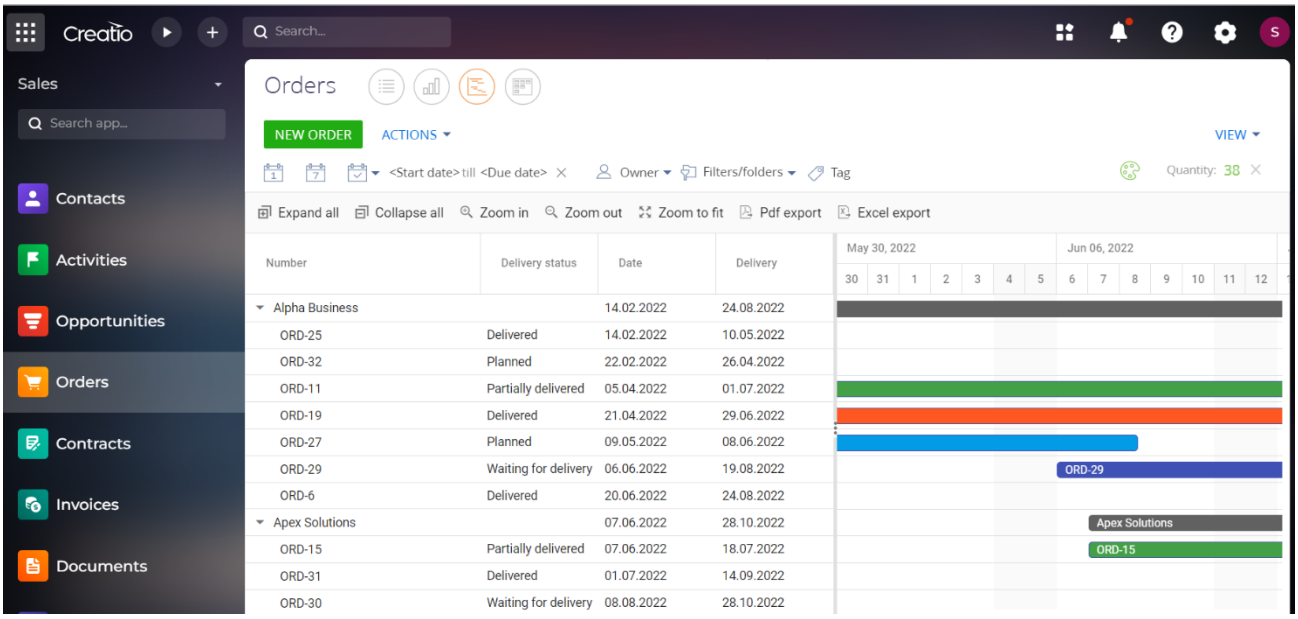
Product description

Sales'Up Data views for Creatio product makes it possible to display records of any system objects in non-standard formats for convenient and quick analysis, the data becomes more understandable, without the need to study it in detail. (Picture 1.1)



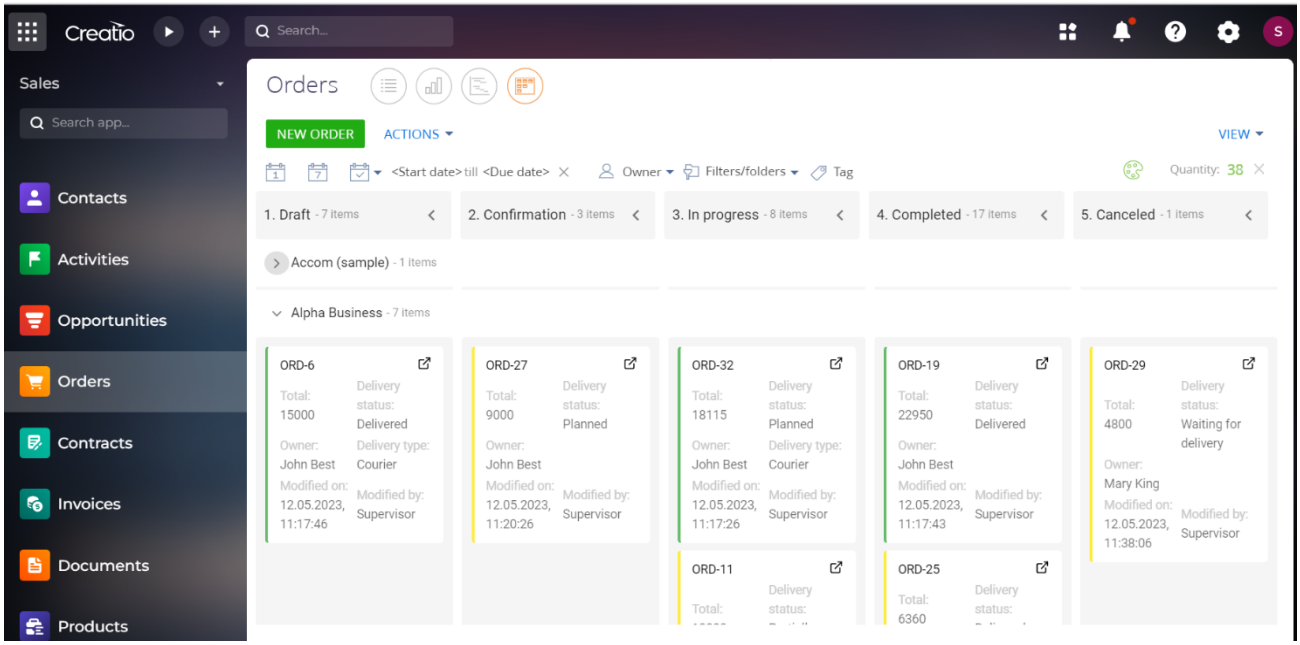
Picture 1.1

Opportunities

- Setting up different views in an unlimited number of sections;
- Displaying records in the format of a **Gantt** chart (Picture 1.1) or a **Kanban** board (Picture 1.2);
- The ability to follow the dates and the process of working with the record;
- Control of deviation from the schedule;
- Data editing with dates and duration;
- Analysis with dividing data by status;
- Control of transition conditions between statuses;
- Editing the status of records from a convenient interface;
- Export Gantt chart into PDF and EXCEL.

  Watch the description of the features on YouTube:

  https://www.youtube.com/watch?v=b52Qb6Oilis&t=77s&ab_channel=Sales%60Up



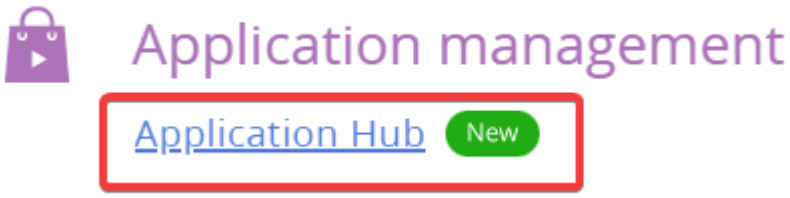
Picture 1.2

Technical requirements

The product is compatible with all products on the Creatio platform version 7.16.0 and higher.

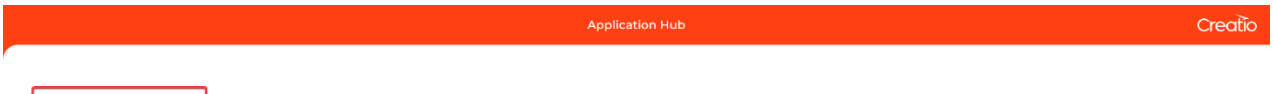
Product installation and setup

To install packages, go to «System Designer» and select «Application Hub» (Picture 4.1).

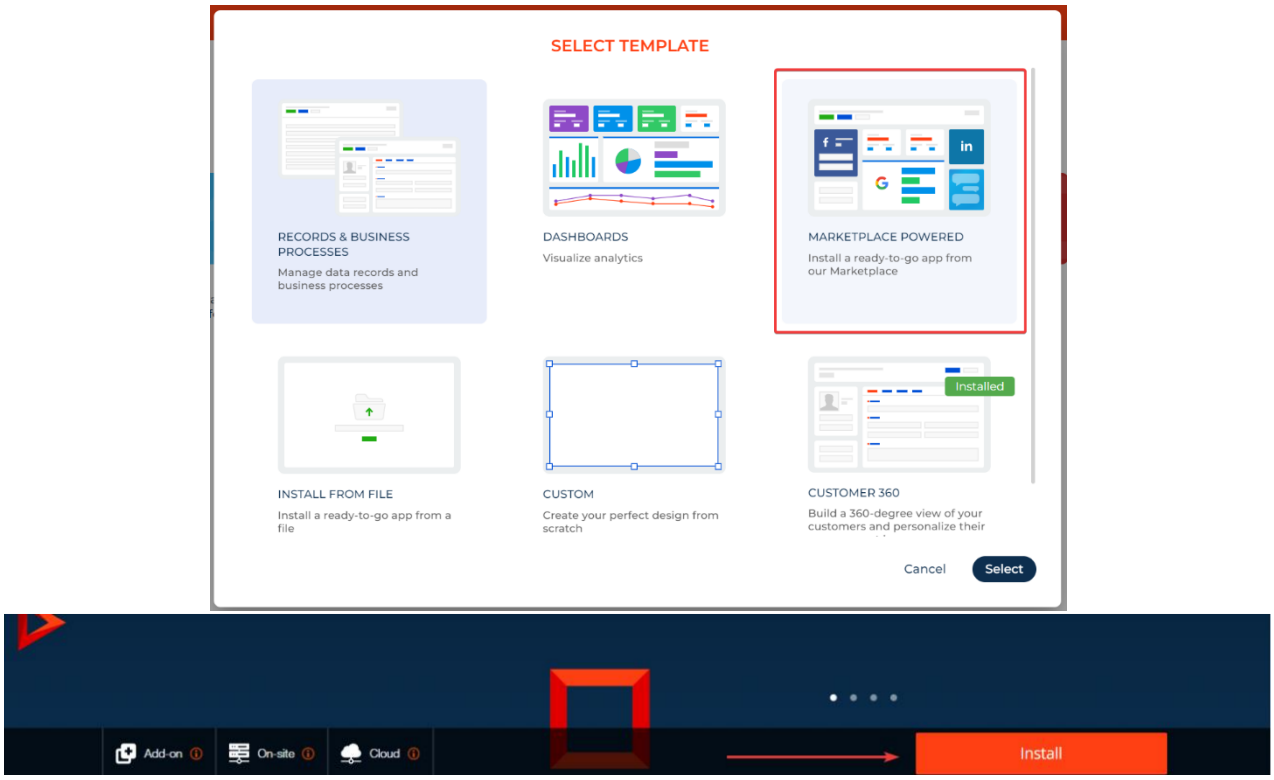


Picture 4.1

On the «Application Hub» page, click «New Application» (Picture 4.2), then «Marketplace powered» (Picture 4.3), enter the booth address, and click «Install».



Picture 4.2

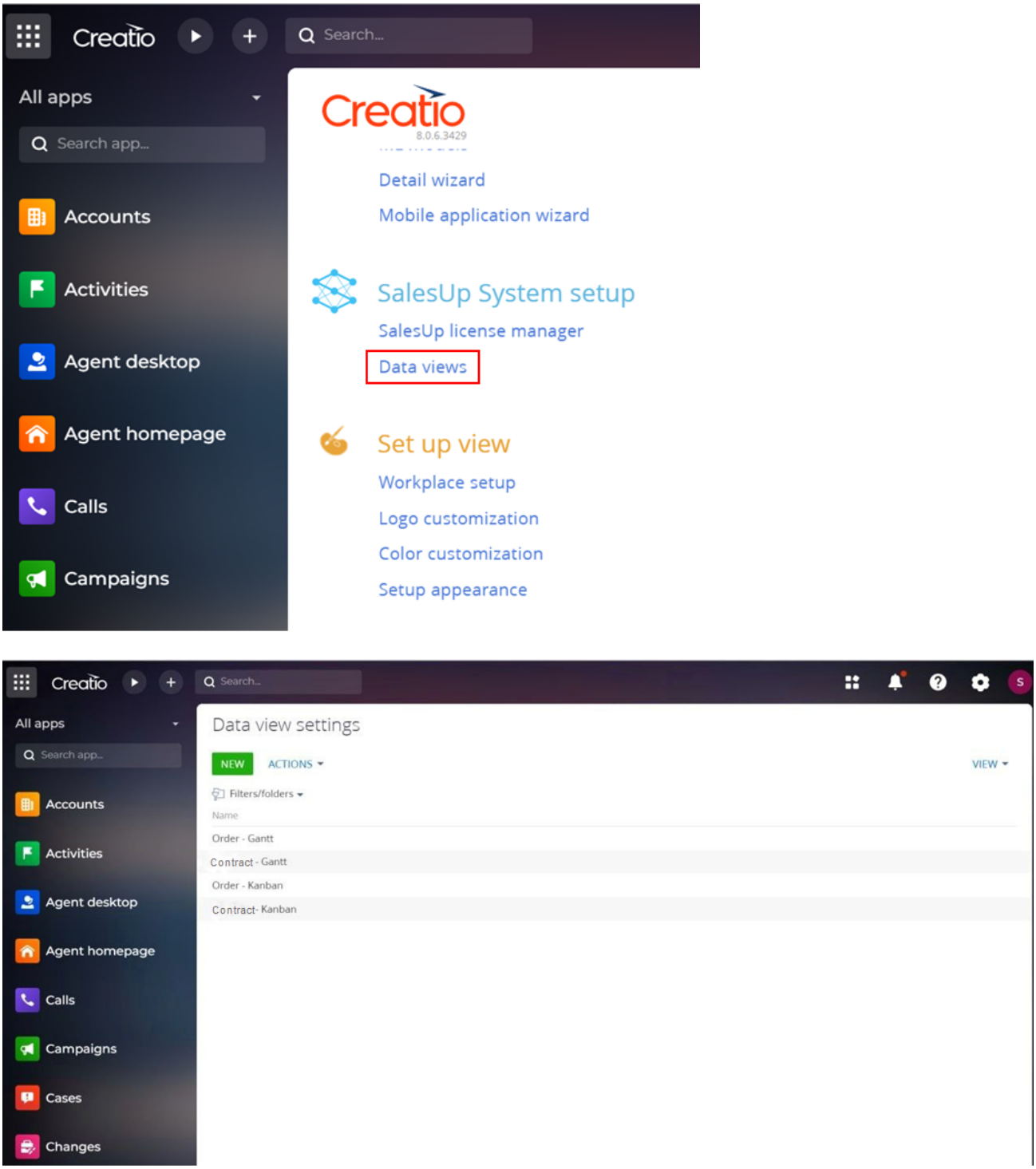


Picture 4.3

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 «Application Hub» page, click «Install from file» (Picture 4.3), specify the path to the archive with the package, and complete the installation.

General settings

To add a Gantt chart or Kanban board to a section, go to «System Designer» and select «Data View Settings» (Picture 5.1):



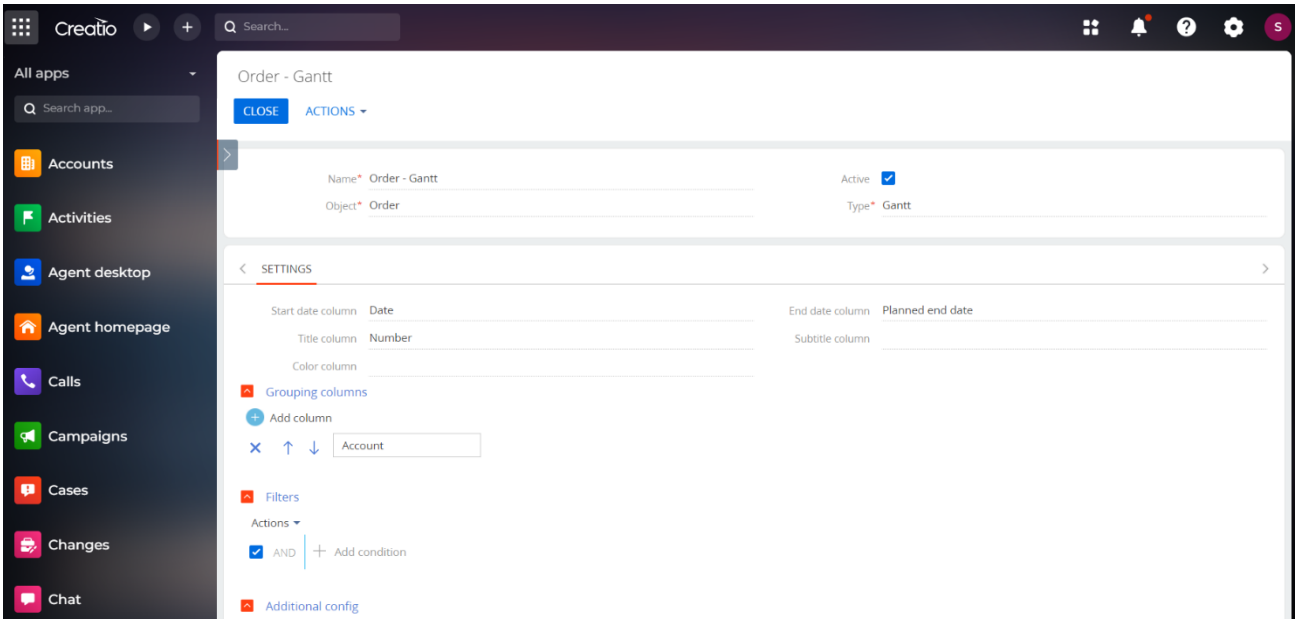
Picture 5.1

Click ADD.

Fill in the fields on the page (Picture 5.2):

Object – section for which we are setting up a board / diagram;

Type – Gantt, Kanban.



Picture 5.2:

After selecting the Type, a set of settings for the corresponding type will appear on the page.

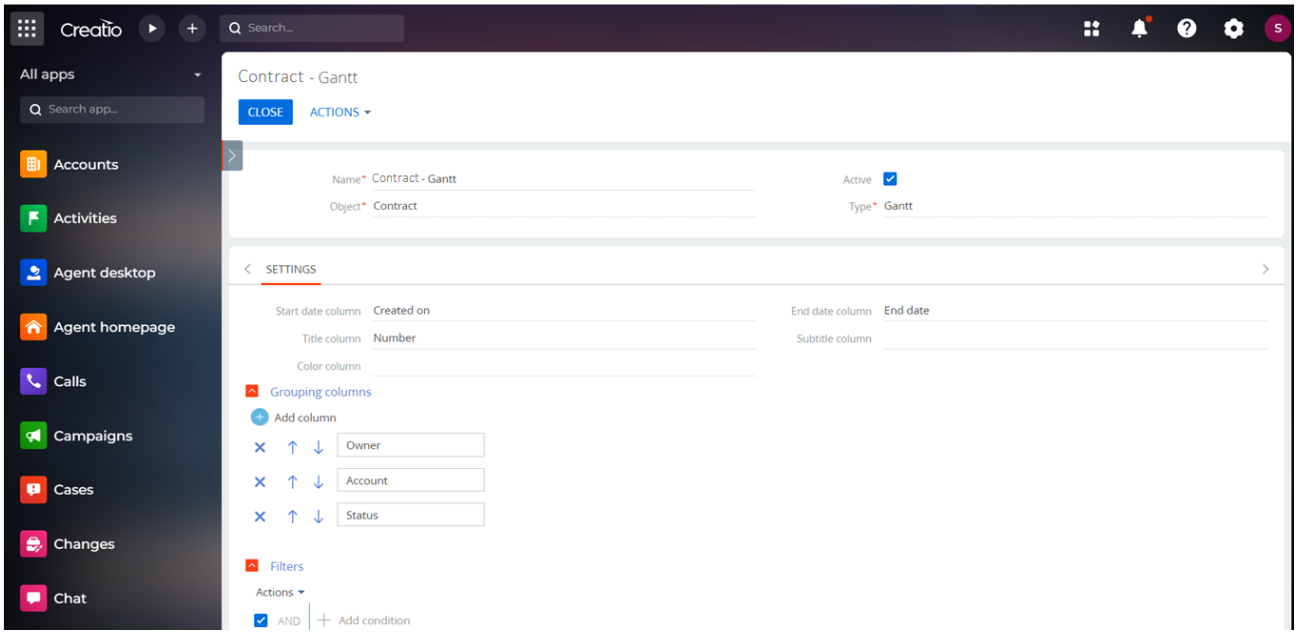
Gantt chart setup

Setting up a Gantt chart is performed for any section of the system in which there are columns for the start date and end date.

You need to fill in the fields (Picture 5.1.1):

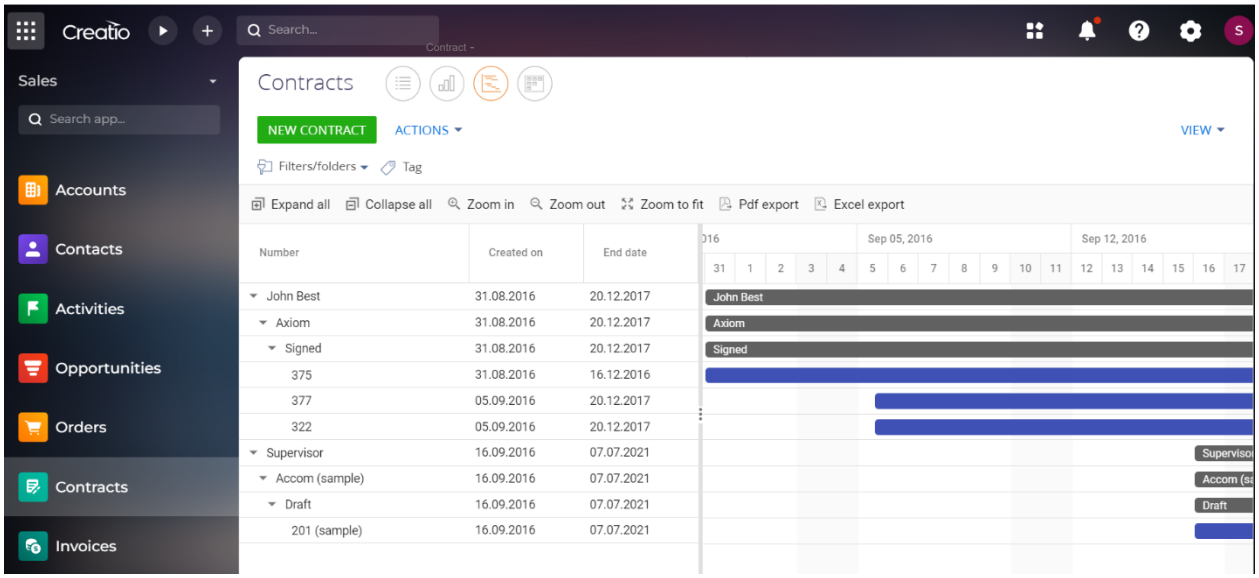
Start date column – for example, the start date of the Contract; End date column – for example, Contract termination date;

Title column - the name of the element, for example, the number of the Contract;
Subtitle column – additional information, such as title;



Picture 5.1.1

Color column – if the object has a color column, this can be displayed on the board (Picture 5.1.2).



Picture 5.1.2

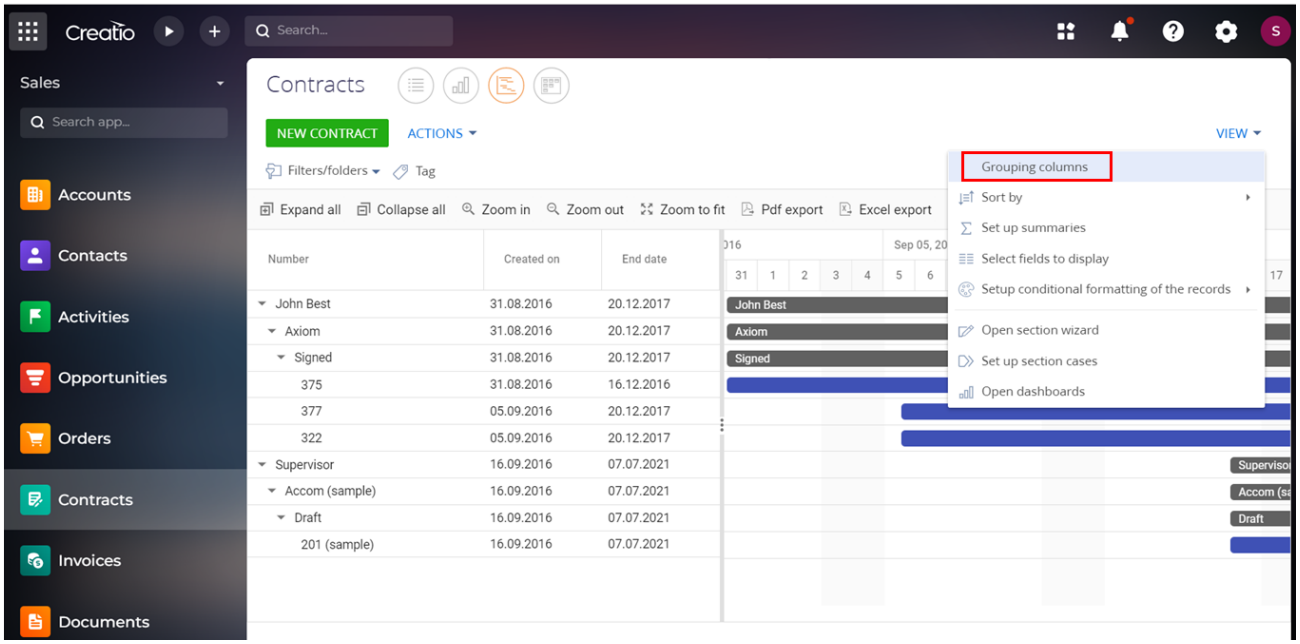
In the «Group Columns» setting, you can set up the hierarchy for displaying records on the chart. To add a hierarchy level, click Add column

To change/delete levels created functions .

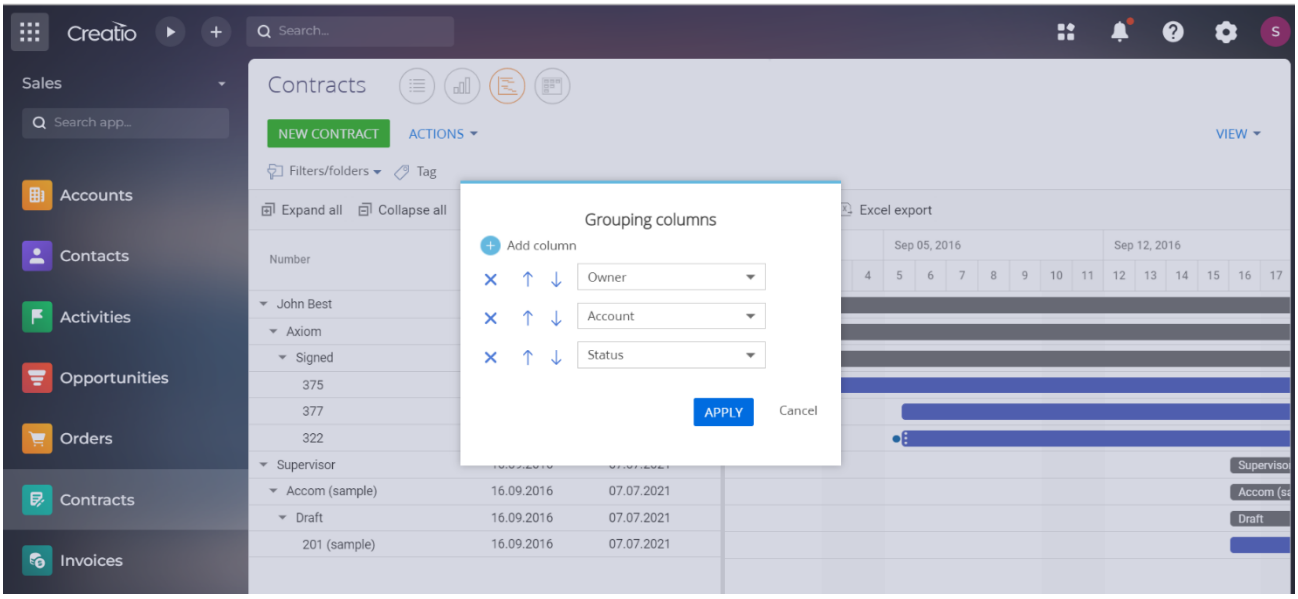
In the «Filters» setting, filters are set by which the record enters the chart.

To complete the setting, press SAVE.

The user can change the hierarchy on the Gantt chart personally for themselves, for this you need to go to the Gantt chart, open the «View» menu (Picture 5.1.3) and select «Grouping columns» (Picture 5.1.4). In this way, the user can change the hierarchy, which will take precedence over the general setting for a particular user.

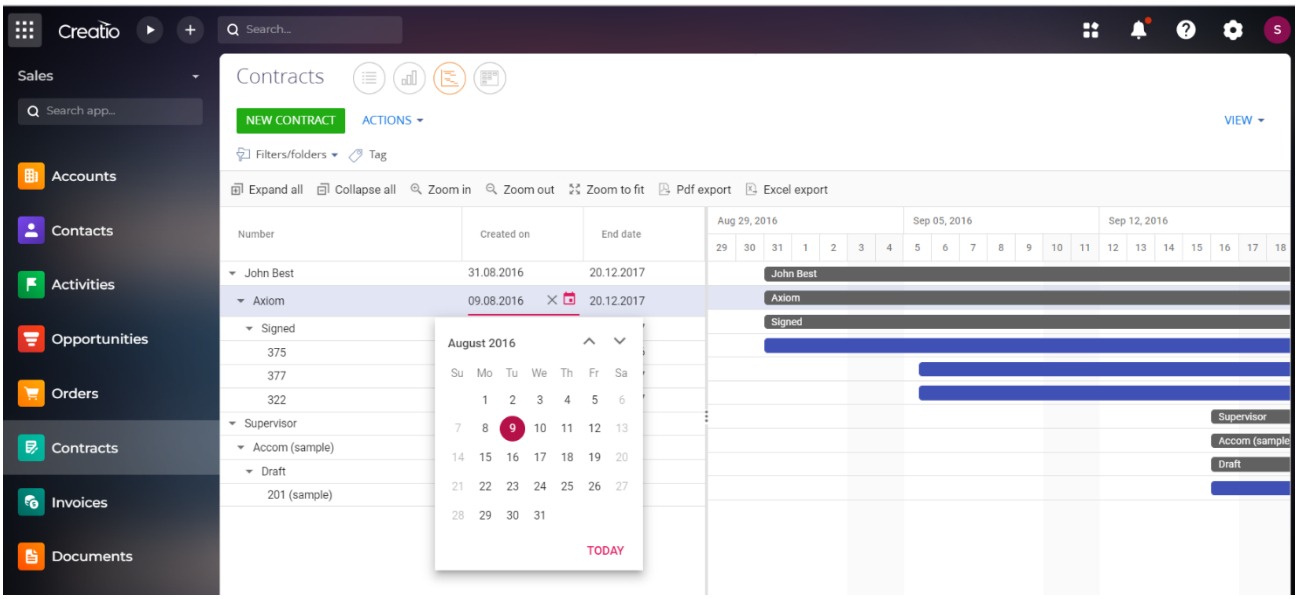


Picture 5.1.3



Picture 5.1.4

Using the Gantt chart view, the user can change the start and end dates for a record by dragging the record block on the chart or changing the start date and end date by double-clicking on the corresponding column in the chart registry (Picture 5.1.5)



Picture 5.1.5

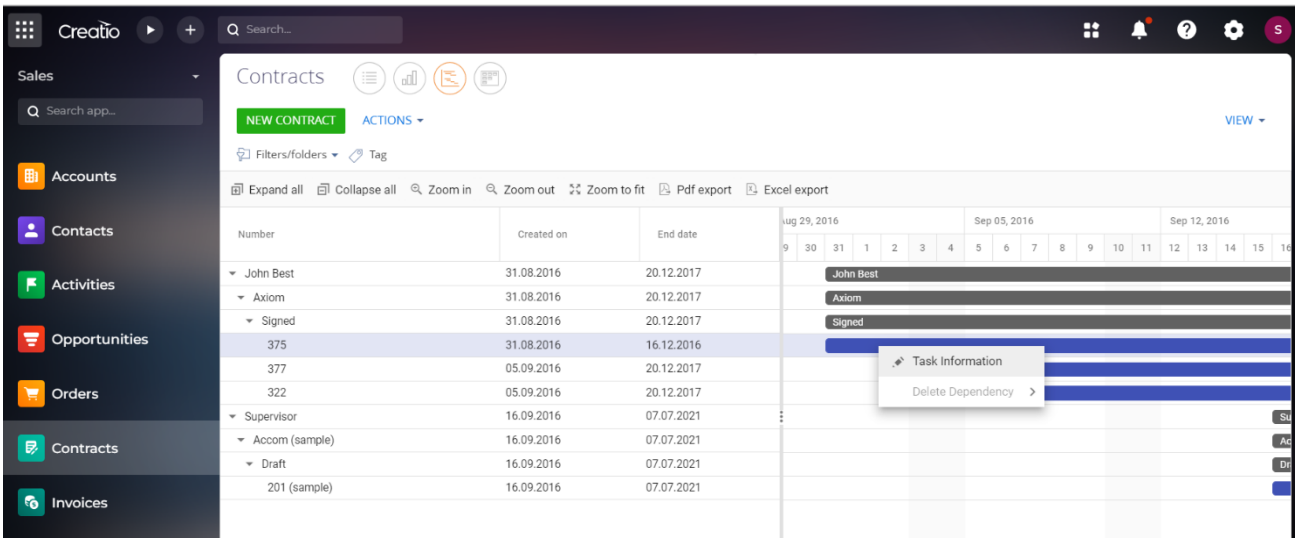
For the convenience of finding the display of the block on the Gantt chart, with a single click on the required record in the chart registry, the block with the task will be pulled to the chart with the focus on the start date.

If in the section for which the Gantt chart is configured, there is a link detail, then such a link can be displayed on the chart.

There 4 types of connections (Рис. 5.1.6):

- Start - Start;
- Start - End;

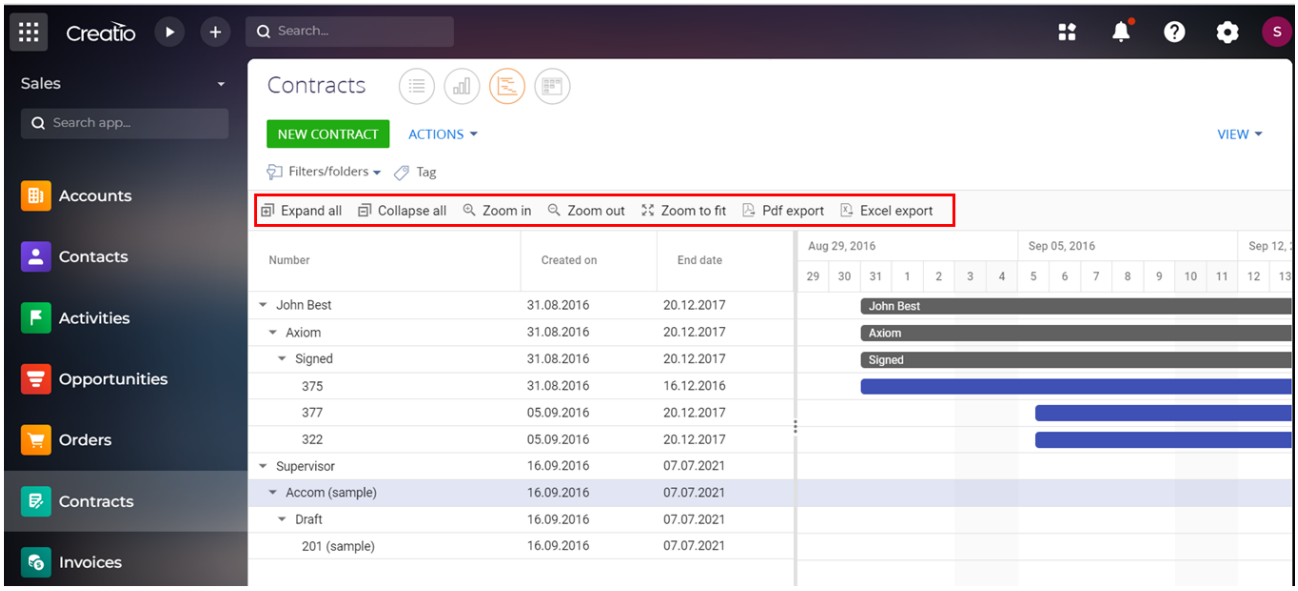
- End - End;
- End - Start.



Picture 5.1.6

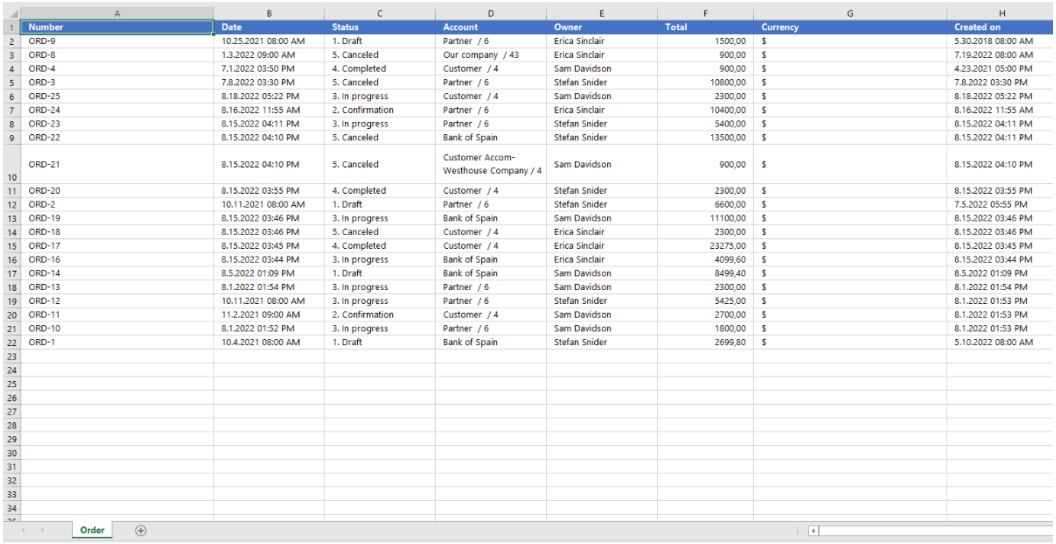
Using the «Zoom to fit» button (Picture 5.1.7) the diagram will display all the blocks adapted to the size of the time scale set for the diagram.

The «Expand all» and «Collapse all» buttons allow you to hide or expand, respectively, the hierarchy configured for the chart registry, displaying the timeline along the top hierarchy level in the chart (Picture 5.1.7).



Picture 5.1.7

To present the Gantt chart, there is a function to export data to excel and PDF files. When exporting to Excel, the configured hierarchy and chart registry columns are uploaded to the file. (Picture 5.1.8)



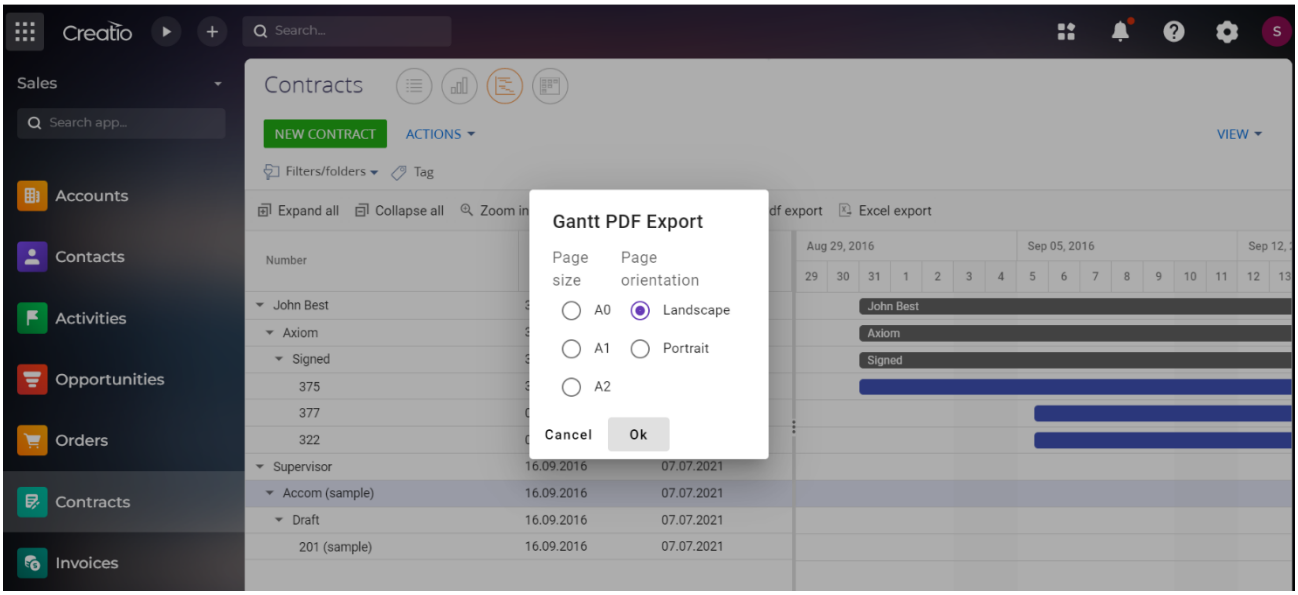
Number	Date	Status	Account	Owner	Total	Currency	Created on
ORD-9	10.25.2021 08:00 AM	1. Draft	Partner / 6	Erica Sinclair	1500,00	$	5.30.2018 08:00 AM
ORD-8	1.3.2022 09:00 AM	5. Canceled	Our company / 43	Erica Sinclair	900,00	$	7.19.2022 08:00 AM
ORD-4	7.1.2022 03:50 PM	4. Completed	Customer / 4	Sam Davidson	900,00	$	4.23.2021 05:00 PM
ORD-3	7.8.2022 03:30 PM	5. Canceled	Partner / 6	Stefan Snider	10800,00	$	7.8.2022 03:30 PM
ORD-25	8.18.2022 05:22 PM	3. In progress	Customer / 4	Sam Davidson	2300,00	$	8.18.2022 05:22 PM
ORD-24	8.16.2022 11:55 AM	2. Confirmation	Partner / 6	Erica Sinclair	10400,00	$	8.16.2022 11:55 AM
ORD-23	8.15.2022 04:11 PM	3. In progress	Partner / 6	Stefan Snider	5400,00	$	8.15.2022 04:11 PM
ORD-22	8.15.2022 04:10 PM	5. Canceled	Bank of Spain	Stefan Snider	13500,00	$	8.15.2022 04:11 PM
ORD-21	8.15.2022 04:10 PM	5. Canceled	Customer Accom-Westhouse Company / 4	Sam Davidson	900,00	$	8.15.2022 04:10 PM
ORD-20	8.15.2022 03:55 PM	4. Completed	Customer / 4	Stefan Snider	2300,00	$	8.15.2022 03:55 PM
ORD-2	10.11.2021 08:00 AM	1. Draft	Partner / 6	Stefan Snider	6600,00	$	7.5.2022 05:55 PM
ORD-19	8.15.2022 03:46 PM	3. In progress	Bank of Spain	Sam Davidson	11100,00	$	8.15.2022 03:46 PM
ORD-18	8.15.2022 03:46 PM	5. Canceled	Customer / 4	Erica Sinclair	2300,00	$	8.15.2022 03:46 PM
ORD-17	8.15.2022 03:45 PM	4. Completed	Customer / 4	Erica Sinclair	23275,00	$	8.15.2022 03:45 PM
ORD-16	8.15.2022 03:44 PM	3. In progress	Bank of Spain	Erica Sinclair	4099,60	$	8.15.2022 03:44 PM
ORD-14	8.5.2022 01:09 PM	1. Draft	Bank of Spain	Sam Davidson	8499,40	$	8.5.2022 01:09 PM
ORD-13	8.1.2022 01:54 PM	3. In progress	Partner / 6	Sam Davidson	2300,00	$	8.1.2022 01:54 PM
ORD-12	10.11.2021 08:00 AM	3. In progress	Partner / 6	Stefan Snider	5425,00	$	8.1.2022 01:53 PM
ORD-11	11.2.2021 09:00 AM	2. Confirmation	Customer / 4	Sam Davidson	2700,00	$	8.1.2022 01:53 PM
ORD-10	8.1.2022 01:52 PM	3. In progress	Partner / 6	Sam Davidson	1800,00	$	8.1.2022 01:53 PM
ORD-1	10.4.2021 08:00 AM	1. Draft	Bank of Spain	Stefan Snider	2699,80	$	5.10.2022 08:00 AM

Order

Picture 5.1.8

When exporting to a PDF file, the hierarchy and columns of the chart registry are unloaded, as well as the timeline with the blocks displayed on it.

To export a PDF file, click «PDF export» and specify the page orientation and size (Picture 5.1.9)



Picture 5.1.9

Kanban board setup

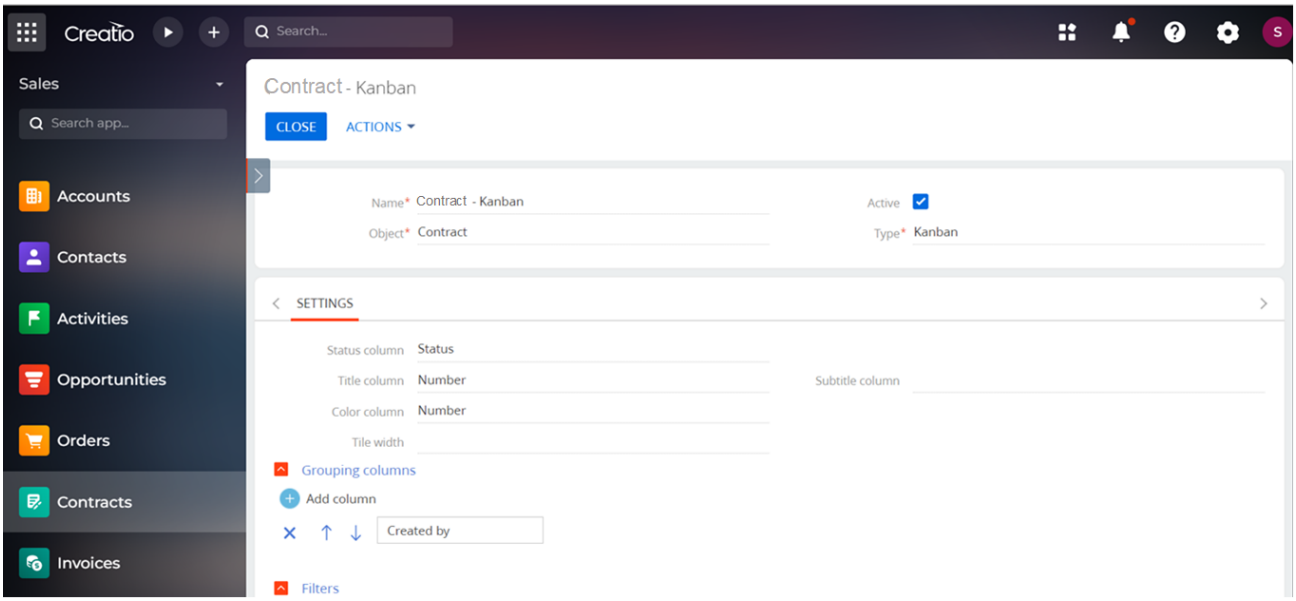
Kanban board settings are made for any section of the system that has a status bar or column with a status value.

You need to fill in the fields (Picture 5.2.1):

Status column - for example, the status of the Order;

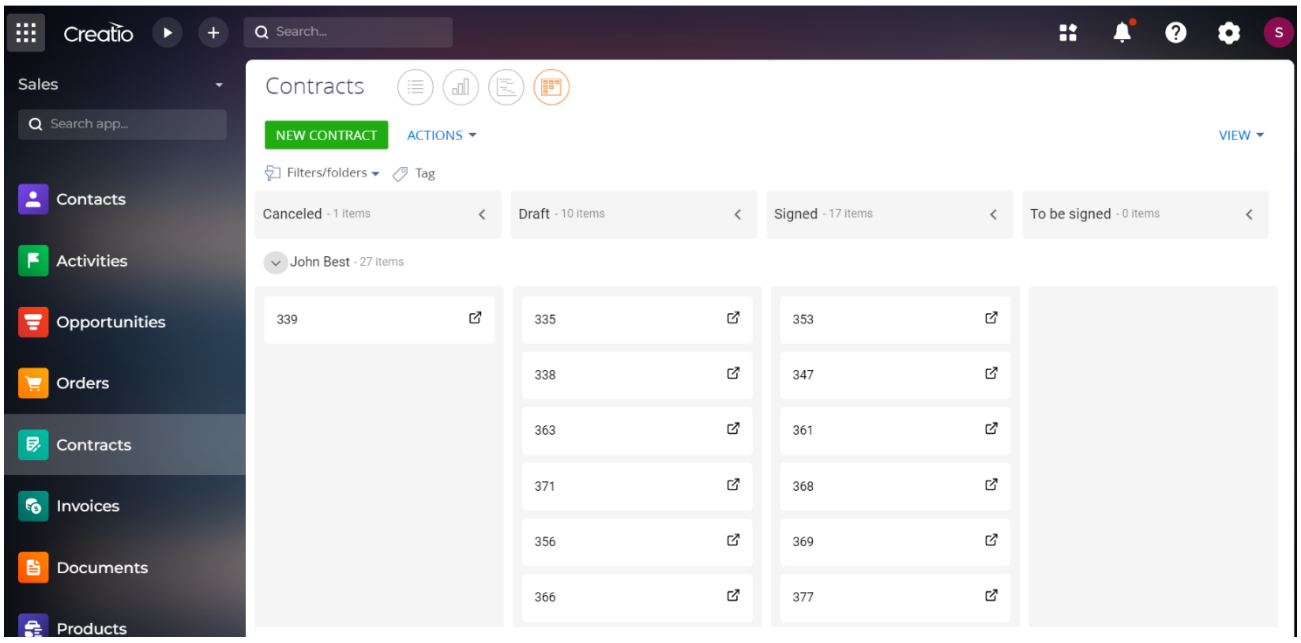
Title column - the name of the element, for example, the Order number;

Subtitle column - additional information, for example, Recipient's name;



Picture 5.2.1

Color column - if the object has a color column, it can be displayed on the diagram (Picture 5.2.2).



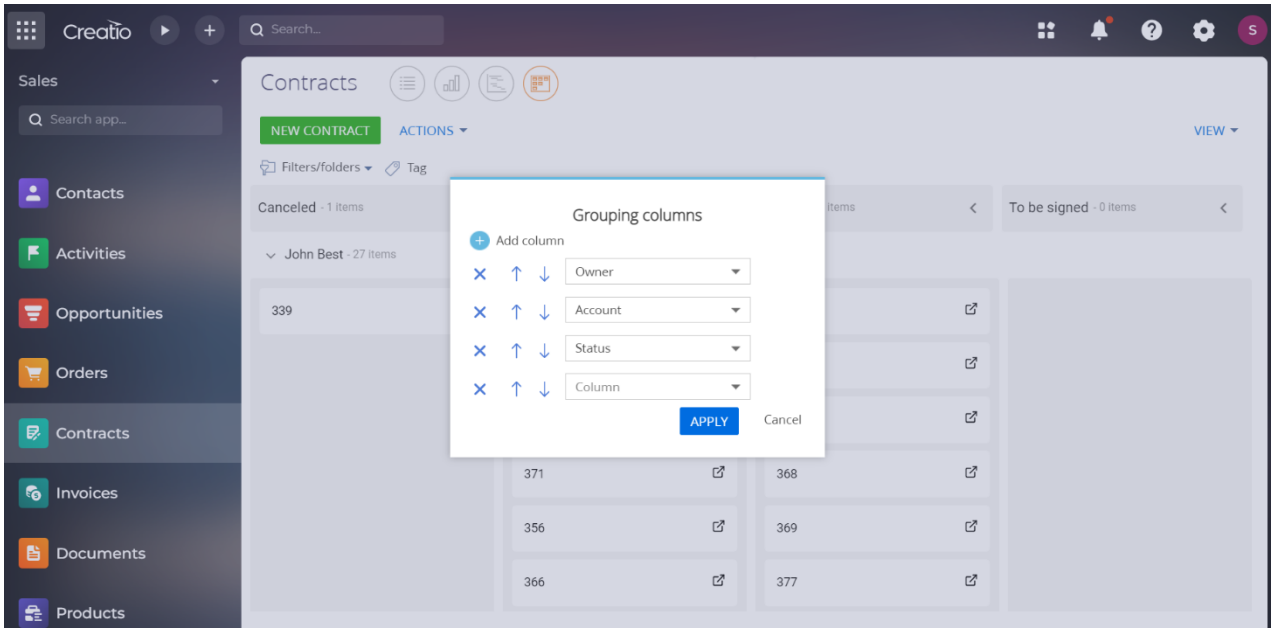
Picture 5.2.2

In the «Group Columns» setting, you can set up a hierarchy for displaying posts on the board. To add a hierarchy level, click Add column

In the «Filters» setting, filters are set by which the post gets on the board.

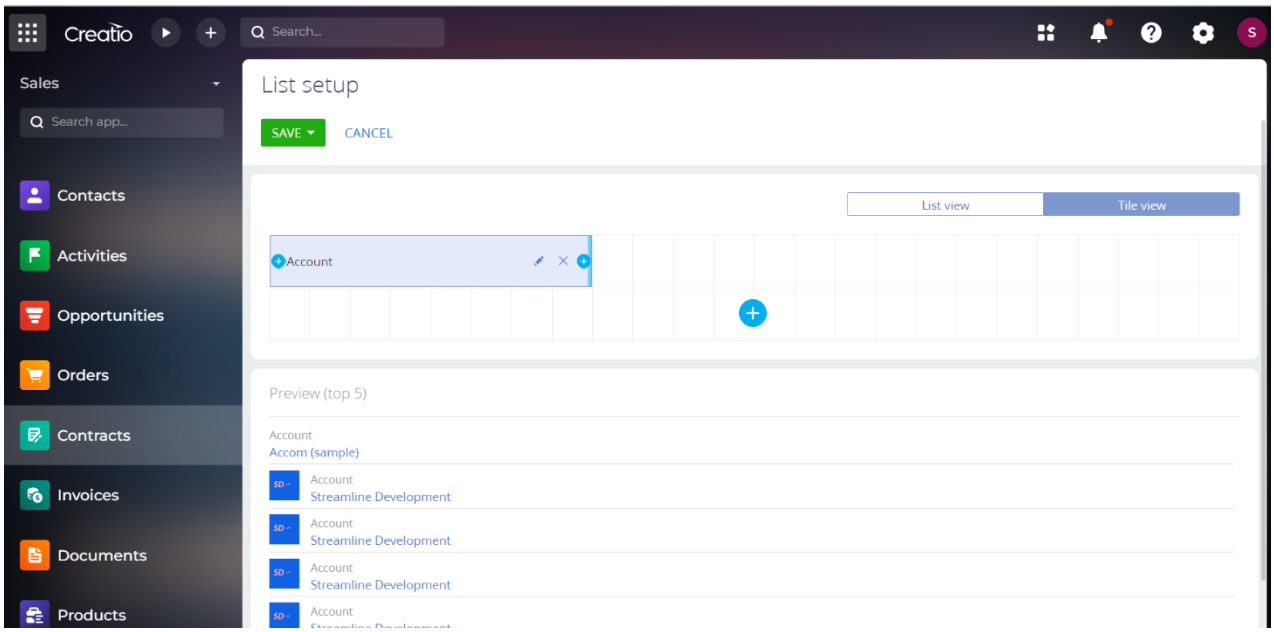
Press SAVE to save the setting.

The user can change the hierarchy on the Kanban board personally for them; to do this, go to the Kanban board, open the «View» menu (Picture 5.2.3) and select «Grouping columns». (Picture 5.2.4) In this way, the user can change the hierarchy, which will take a higher priority over the general setting for a particular user.



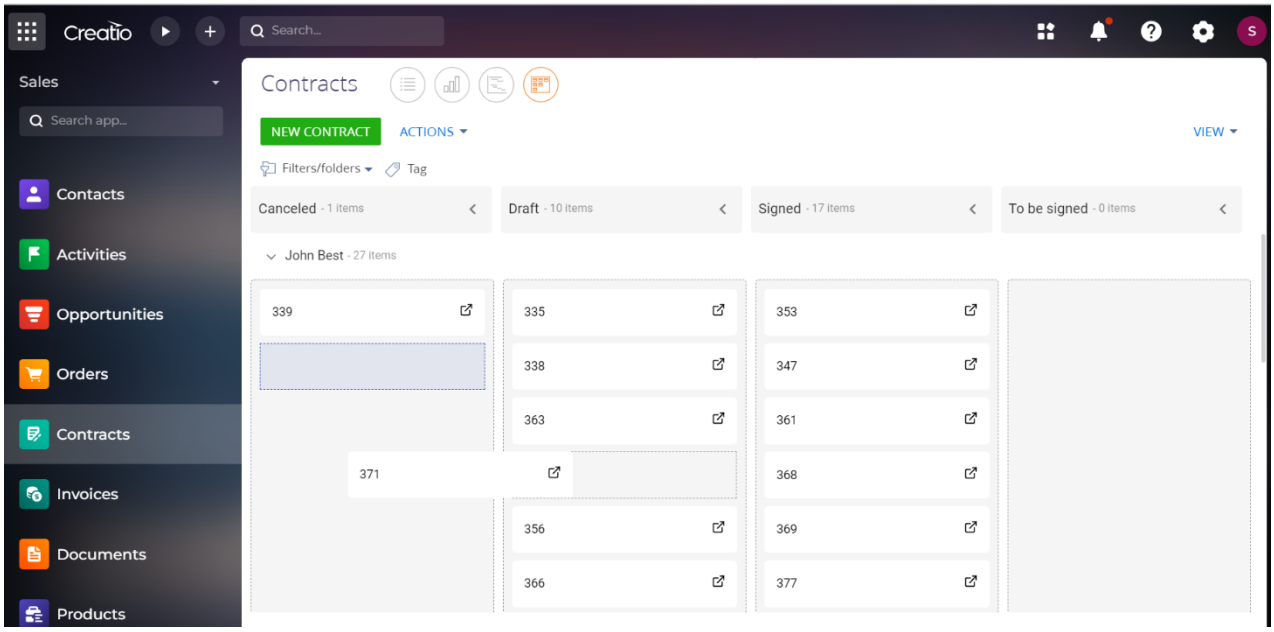
Picture 5.2.4

The user can add all the necessary information to the Kanban board block directly from the Kanban board view. To do this, go to the «View» menu and in the column settings for tiled display, add those columns that should be displayed on the Kanban board block (Picture 5.2.5).



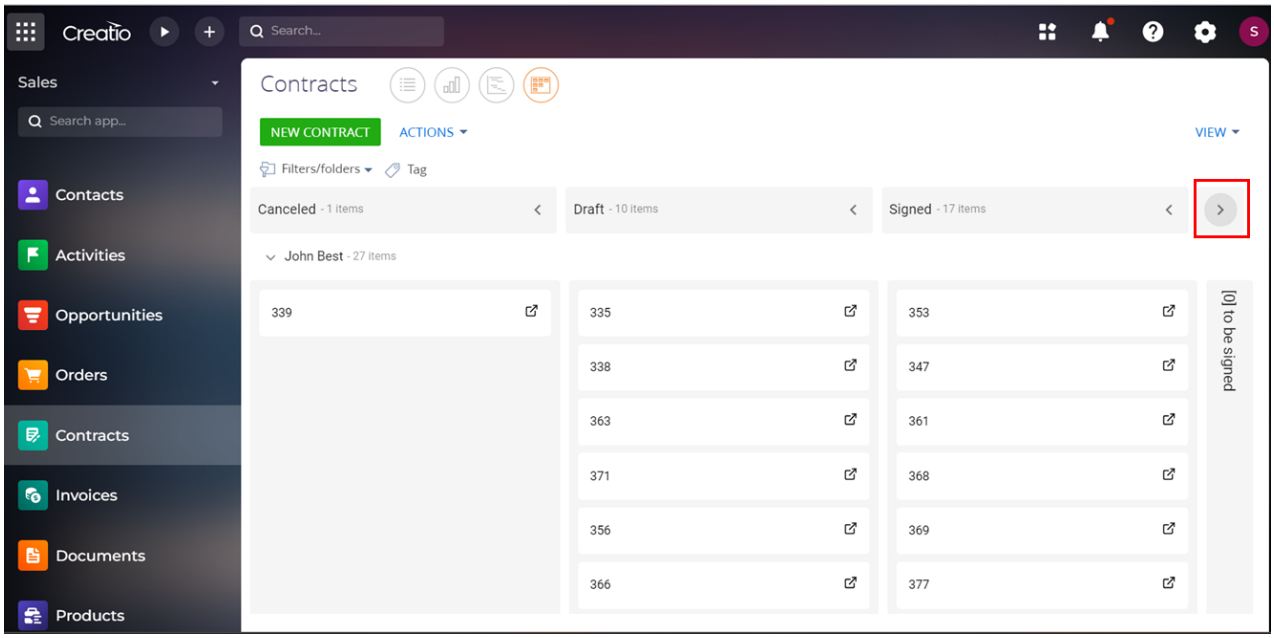
Picture 5.2.5

Using the Kanban board, the user can move blocks from one status to another, in accordance with the settings of the section cases, and after moving the block from one status to another (Picture 5.2.6), the status will change automatically on the section records.



Picture 5.2.6

For the convenience of working with the diagram, the user can hide the levels and columns on the Kanban board (Picture 5.2.7).



Picture 5.2.7

Conditional formatting

Records' Conditional Formatting for Creatio product – a tool, which allows setting the conditions for a visual display of any records in a section's registry or detail depending on customized filters.

The product provides the possibility to partially or fully change a visual display of registry records – from border color of a record to its text color or format.

The product functionality is versatile and can be used by companies of any industry.

It is perfectly compatible with the Data views product.

Use cases:

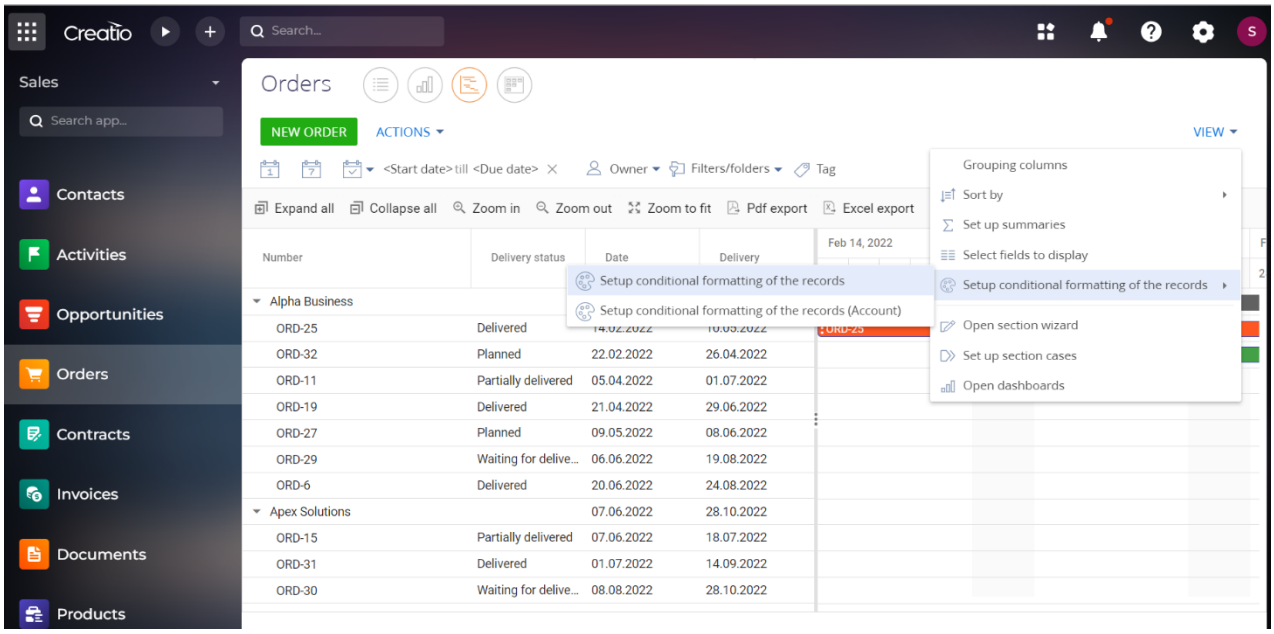
- The set-up wizard is convenient and intuitive;
- 6 elements of registry records formatting, which enables users to change colors of border, text, background, and to make text bold, italics, change its size;
- Possibility to add an unlimited number of conditions for one registry;
- Automatic generation of a hint in the registry with customized formatting conditions after saving the settings;
- Configuration of filtration of any complexity for formatting;
- Preview of the future setting to conveniently make changes and edits.

The installation of a product is similar to the one of the Data views. Its name: Records' conditional formatting for Creatio.

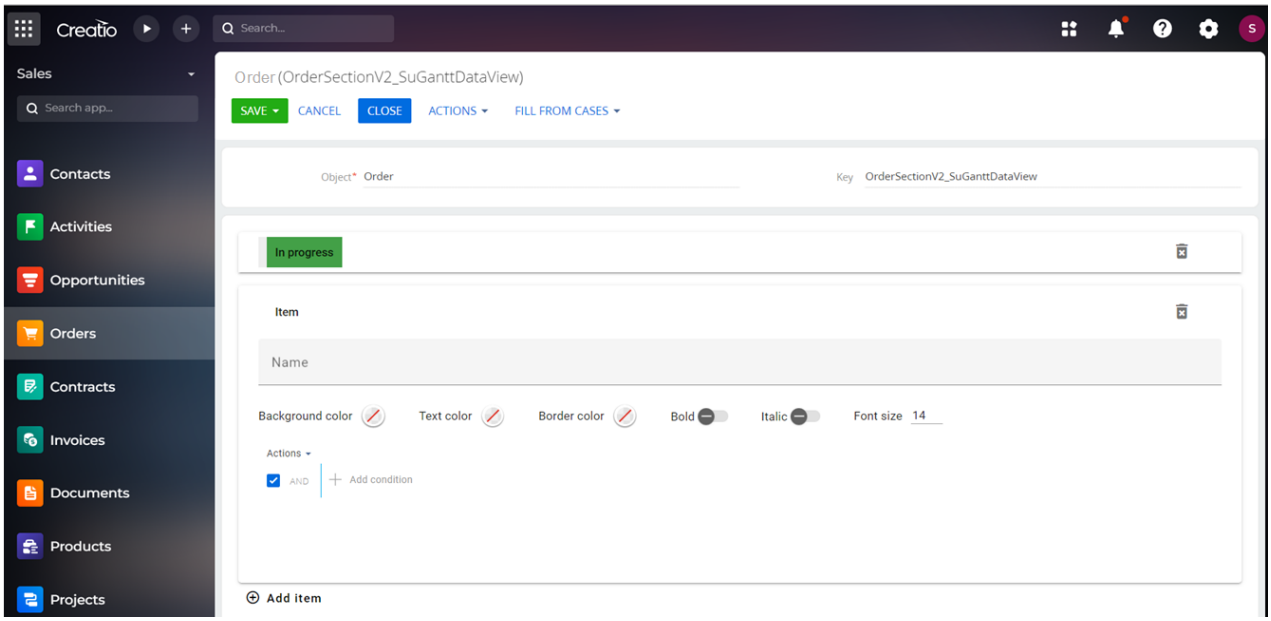
To set up records' conditional formatting in section's registry:

1. Highlight a section which the records' formatting needs to applied to.

2. Press the «View» button and select the «Setup conditional formatting of the records» option.

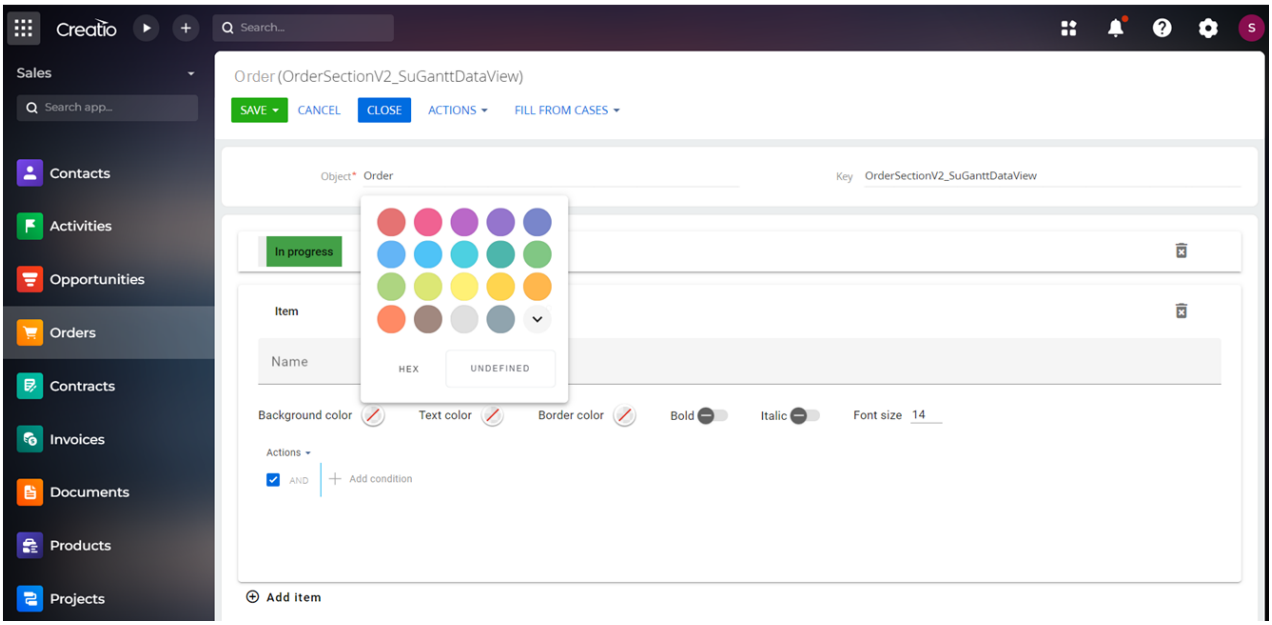


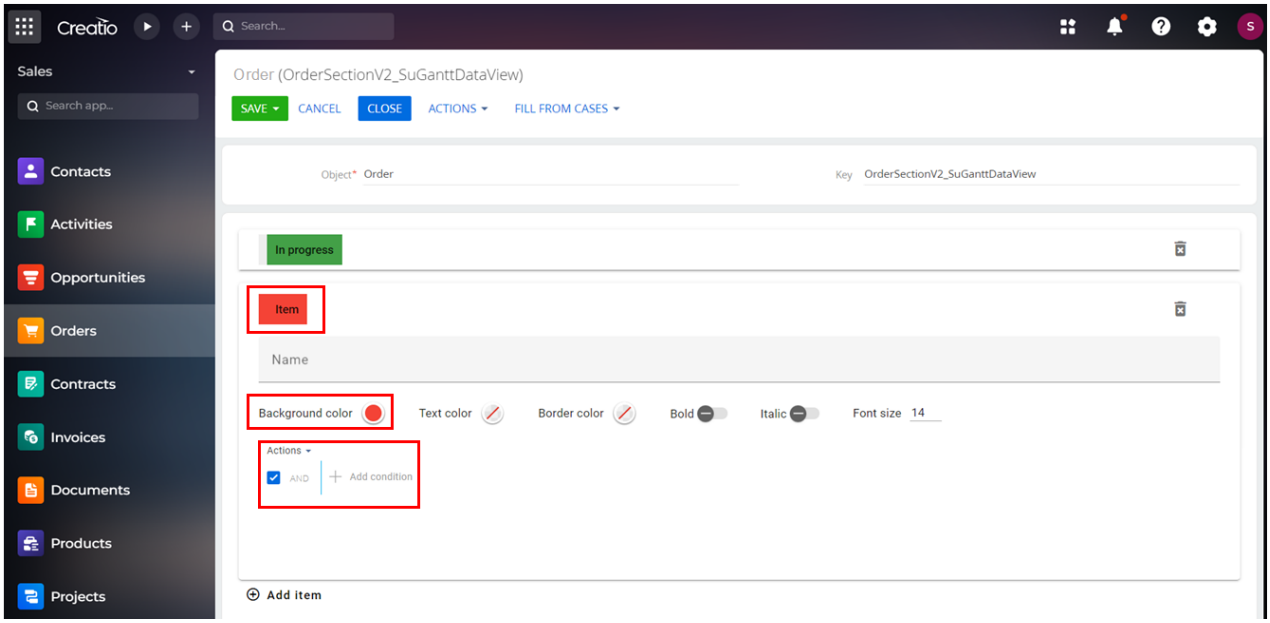
On the setup wizard page click the «Add item».



Add necessary functions of the records' conditional formatting:

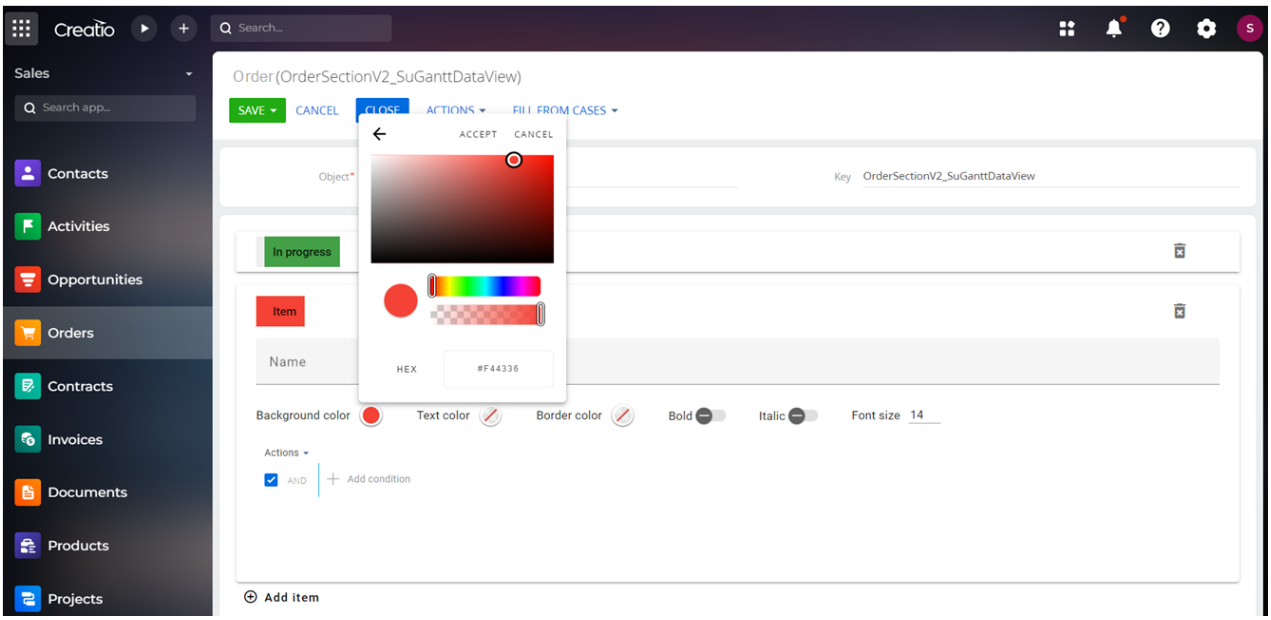
If applicable, choose a background color on the color panel in the «Background color» field.





If applicable, choose a text color on the color panel in the «Text color» field.

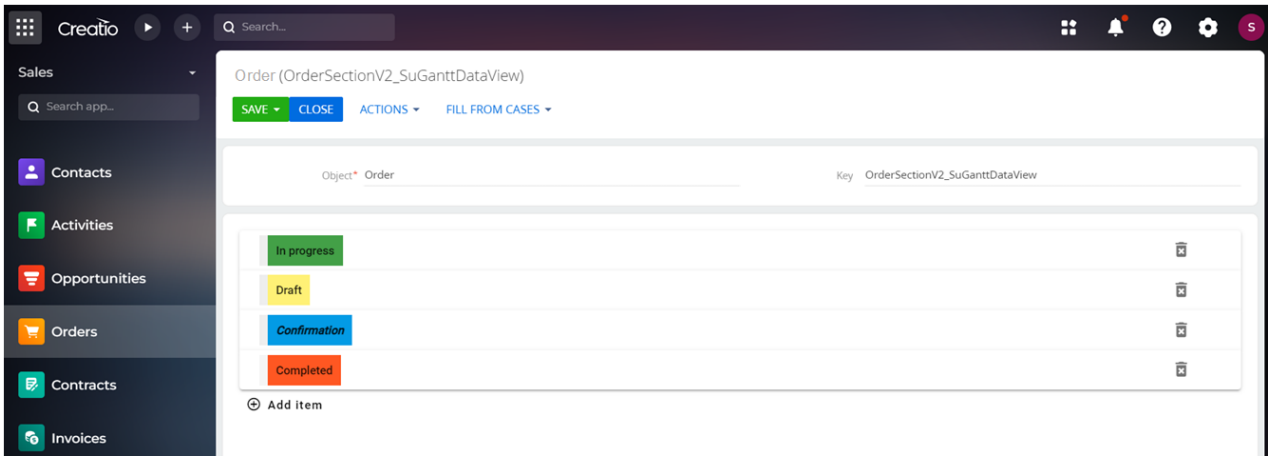
Note! User is able to select any desired shade of color by clicking this icon on a color panel.

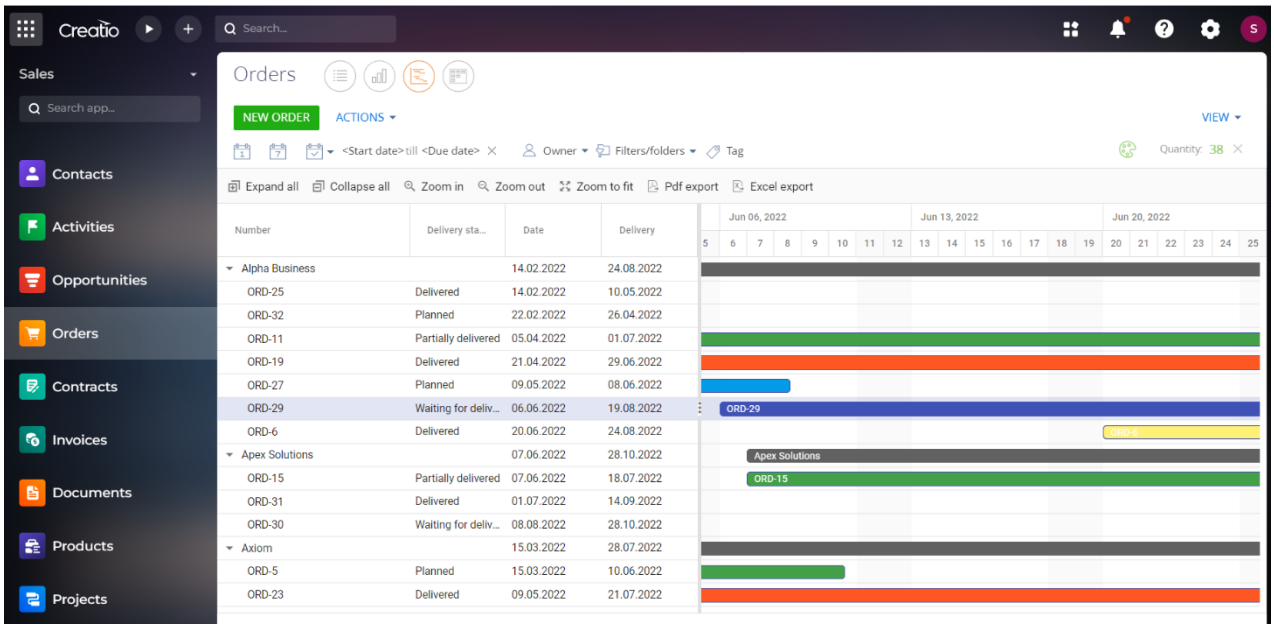


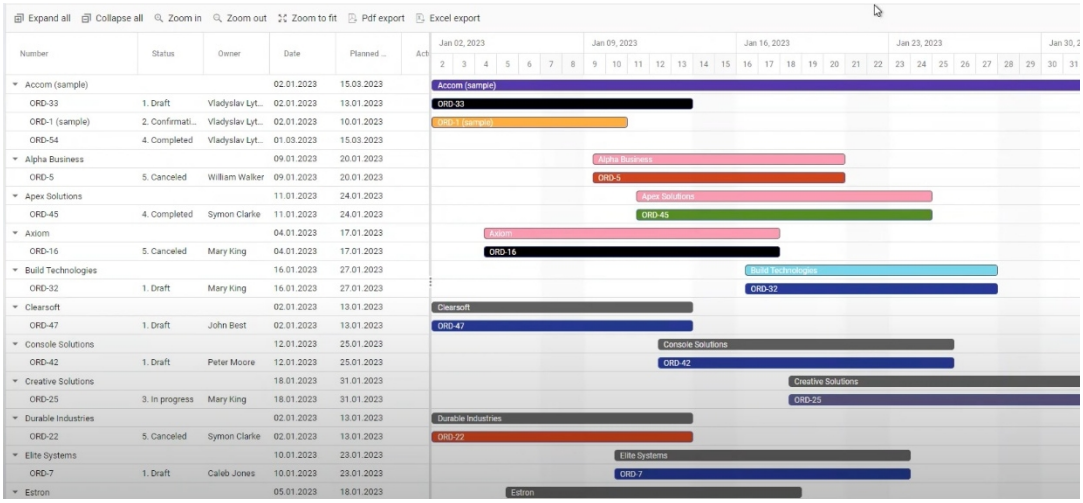
It is possible to display records in any color on the Kanban board and Gantt chart by setting up a specific filter for each one simultaneously. This way they will be perfectly perceived visually.

Example:

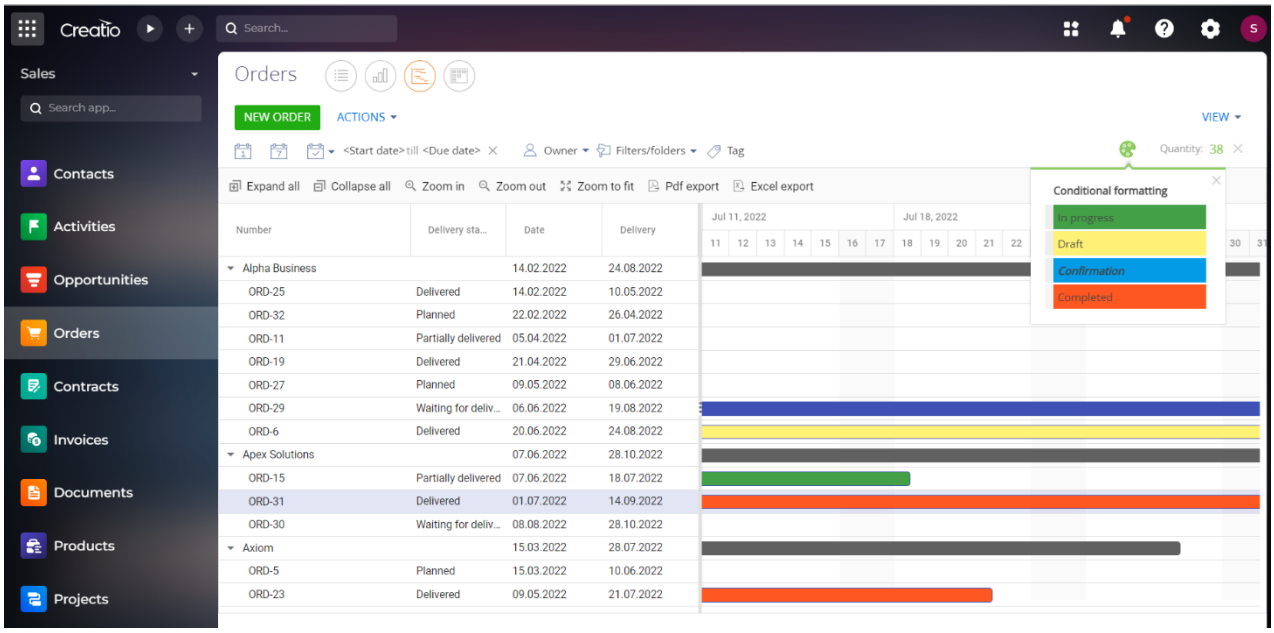
Let’s apply a different color for each order’s delivery status.







When you hover over the palette button , a hint pops up with information on the conditional formatting of each item.


Creatio
Search...
Sales
Search app...
Contacts
Activities
Opportunities
Orders
Contracts
Invoices
Documents
Products
Projects
Orders
NEW ORDER
ACTIONS
VIEW
<Start date> till <Due date>
Owner
Filters/folders
Tag
Quantity: 38
Expand all
Collapse all
Zoom in
Zoom out
Zoom to fit
Pdf export
Excel export
Conditional formatting
In progress
Draft
Confirmation
Completed
Number
Delivery sta...
Date
Delivery
Jul 11, 2022
Jul 18, 2022
11 12 13 14 15 16 17 18 19 20 21 22
Alpha Business 14.02.2022 24.08.2022
ORD-25 Delivered 14.02.2022 10.05.2022
ORD-32 Planned 22.02.2022 26.04.2022
ORD-11 Partially delivered 05.04.2022 01.07.2022
ORD-19 Delivered 21.04.2022 29.06.2022
ORD-27 Planned 09.05.2022 08.06.2022
ORD-29 Waiting for deliv... 06.06.2022 19.08.2022
ORD-6 Delivered 20.06.2022 24.08.2022
Apex Solutions 07.06.2022 28.10.2022
ORD-15 Partially delivered 07.06.2022 18.07.2022
ORD-31 Delivered 01.07.2022 14.09.2022
ORD-30 Waiting for deliv... 08.08.2022 28.10.2022
Axiom 15.03.2022 28.07.2022
ORD-5 Planned 15.03.2022 10.06.2022
ORD-23 Delivered 09.05.2022 21.07.2022

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