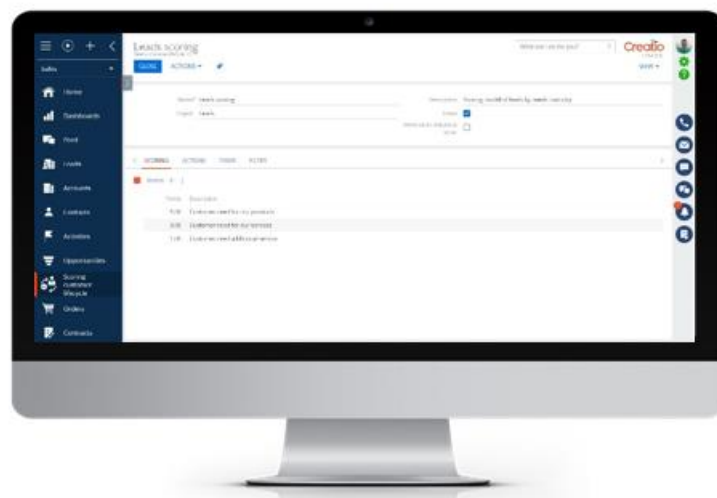




SCORING MODELS FOR CREATIO



Guide
to setup and utilization

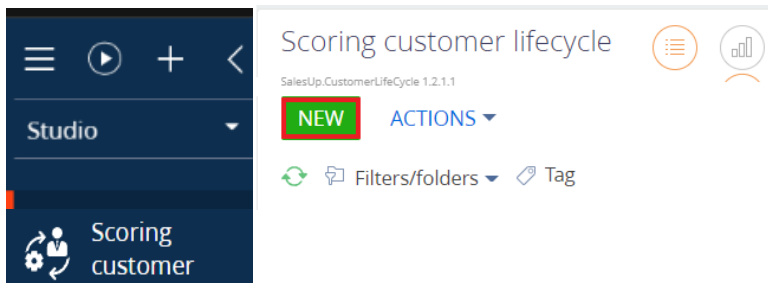
1. Functionality description

The "Scoring Customer Lifecycle" module allows you to assign a certain number of points to various objects of the system, in accordance to predetermined criteria and conditions. As soon as the sum of points reaches predetermined values, the system performs one or another configured action, or a set of actions. The module is a flexible tool that allows you to use scoring models in any object of the system.

For example, in order for the time of managers to be spent efficiently, only those clients who are ready for a deal are analyzed according to the specified criteria, as a result of which these leads are assigned points. Only those applications that meet the predetermined conditions in terms of the amount of points will be transferred to the work of managers.

1.1. Creating a new SCL scoring model record

To create a new SCL record go to 'Scoring Customer Lifecycle' section and press 'New' button.



1.2. Filling of the SCL scoring model page profile

- Name - specify the name of the SCL scoring model
- Object - select the section of the system in which the SCL scoring model will be built
- Description - briefly describe the scoring model
- Active - enable the check-box if you want the current scoring model to be activated.

Leads scoring What can I do for you? > **Creatio**
7.16.4.1532

SAVE CANCEL ACTIONS

VIEW

Name* Leads scoring Description Scoring model of leads by maturity of need

Object Leads Active

Starts on an individual timer



1.3. Scoring tab

< SCORING ACTIONS TIMER FILTER

Terms + ⋮

The "Scoring" tab contains a block for setting the conditions for which points will be awarded, as well as the number of points.

1. Press **+** to add a condition.
2. In the opened window, you have to fill in the fields:

Field	Value
Points	5.00
Description	Customer Need Hardware

< FILTERS

Filters

Actions ▾

AND

Customer need = Hardware

+ Add condition

- a. Points - specify the number of points that should be awarded for fulfilling the condition
- b. Description - briefly describe what points are received for

3. Using the filtering block on the "filters" detail, specify the correspondence of the values of the fields of the "lead" object for which points will be given.

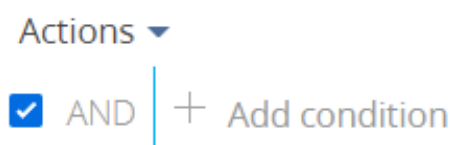


More detailed description of the filtering block is in the next [section 1.3.1.](#)

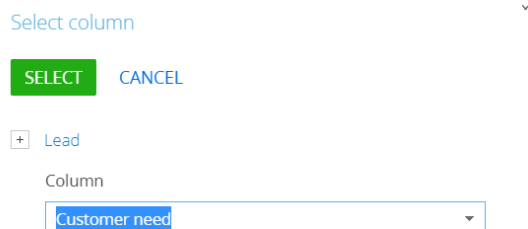
1.3.1. Configuration of scoring filtration conditions

The filtration block is designed to select parameters, specifying conditions. For all records that will match the filtering conditions, the system will credit points. A filter can consist of several parameters and search conditions. This functionality completely repeats the boxed functionality of advanced filtering.

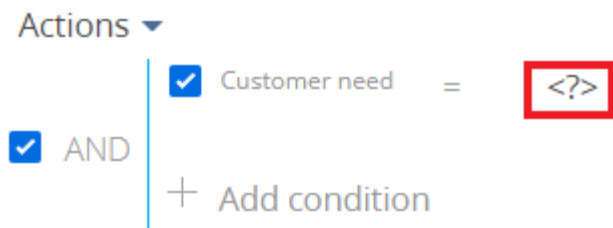
1. To set up search conditions in the filter settings area, click on the link <Add condition>



2. In the window that opens, in the "Column" field, select the needed column for the object, for example, "Type of need" and click the "Select":



3. Specify the required value from the reference by clicking on <?> opposite the selected column in the filter:



4. In the window that opens, select values from the directory, for instance, "Hardware":



Select: Need types

SELECT CANCEL NEW ACTIONS ▾
Records selected: 1 VIEW ▾

SEARCH

Name ▾

- Additional service
- Hardware
- Need for our products
- Need for our services
- Software

5. Specify the required set of conditions on the tab, and assign the required number of points for enrollment to each condition:

Leads scoring What can I do for you? > **Creatio**
7.18.4.1532

CLOSE ACTIONS ▾ VIEW ▾ ↻

Name* Leads scoring Description Scoring model of leads by maturity of need
 Object Leads Active
Starts on an individual timer

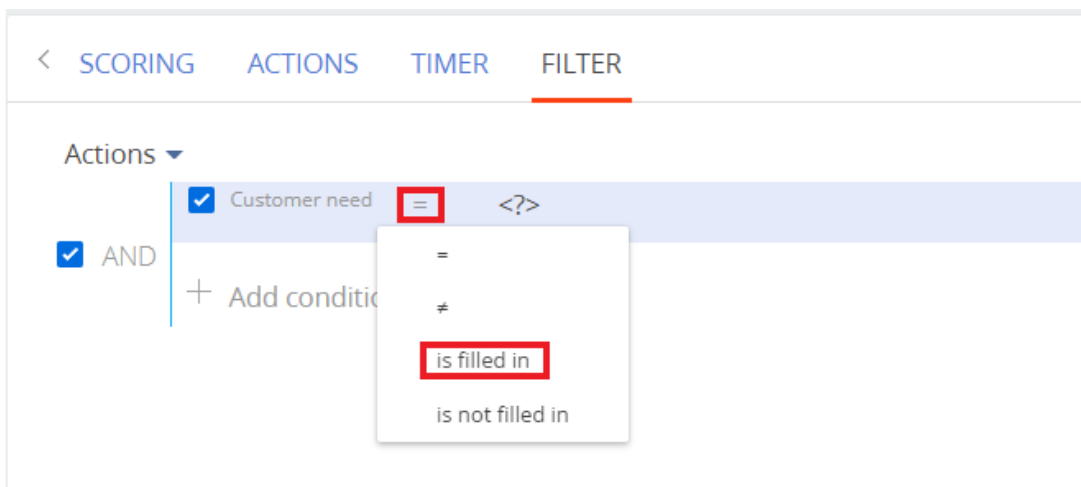
< SCORING ACTIONS TIMER FILTER >

Terms + : 🖨️ ↻

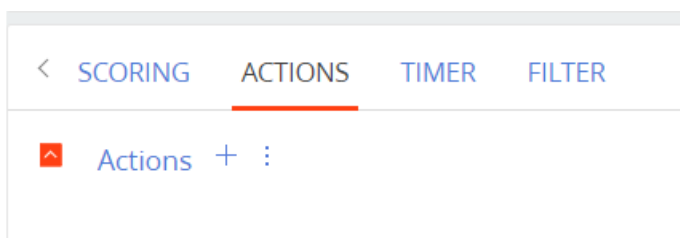
Points	Description	Scoring model of CLC
5.00	Customer Need Hardware	Leads scoring

Note: in order to set up the presence of an account or, for example, Email, in the filtering block, click on \equiv opposite the selected column and select the required condition from the list \equiv :





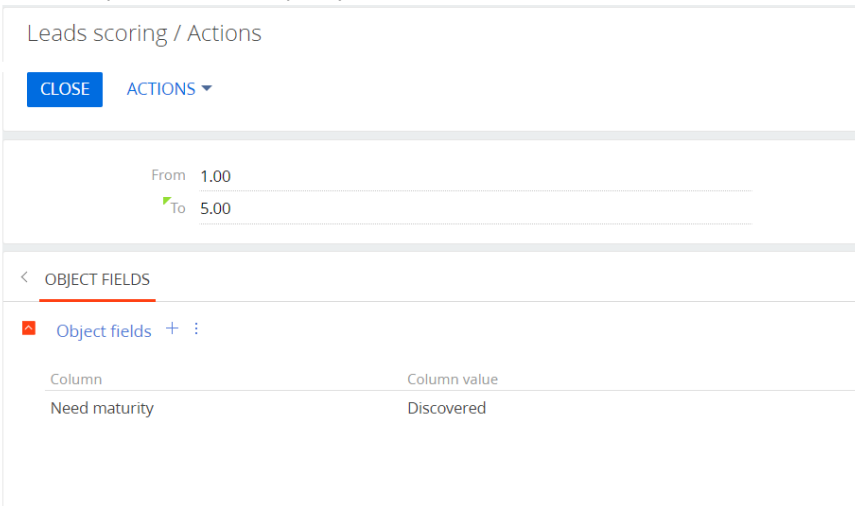
1.4. Actions Tab



The "Actions" tab contains a block for setting the actions that will be performed when the number of points of the object reaches the specified indicator..

1. Press **+** to add an action.

2. In the opened window, specify:



- a. From - Specify the starting value for the scores range at which actions will be performed. For example, 1.
- b. To - Specify the final value for the scores range at which the actions will be performed. For example, 5.

3. Object fields - list the fields of the object and the values that will be applied in the specified range

- a. Press **+** to add an object field.

b. In the window that opens, specify the "Object field" and the "Value" to which the field will change. For example, the field "maturity of need" and the value "implied interest":

Need maturity

SAVE CANCEL ACTIONS ▾

Column* Need maturity
 Lookup value Discovered

You can add several fields.

- c. Save the result by pressing **SAVE**

4. Specify all the required score ranges, as well as the object fields and their values that will change in each specified range:

Leads scoring What can I do for you? > **Creatio** 7.18.4.1532

Sales by CustomerLifeCycle 1.2.1.1

SAVE CANCEL ACTIONS ▾

VIEW ▾ ↻

Name* Leads scoring Description Scoring model of leads by needs maturity

Object Leads Active

Starts on an individual timer

< SCORING **ACTIONS** TIMER FILTER >

✖ Actions + ⋮

Name	From	To	Scoring model of CLC
	7.00	10.00	Leads scoring
	10.00	20.00	Leads scoring
	1.00	5.00	Leads scoring



1.5. SCL scoring model saving

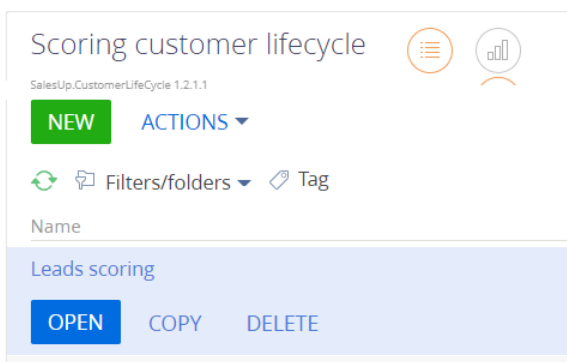
To save SCL scoring model page, on the toolbar, press



Note. The saving can be done after filling in mandatory fields.

1.6. Opening, copying and deleting SCL scoring model

In the "SCL scoring model" section in the registry of section records, when choosing a SCL scoring model, you can open, create a copy, or delete a record.



When copied, an identical record is created with all selected details, fields filled in and filters set. Only the "Name" field remains empty, which must be filled in.

Make the necessary changes for the new page of the SCL model and save the record by clicking on the "Save" button

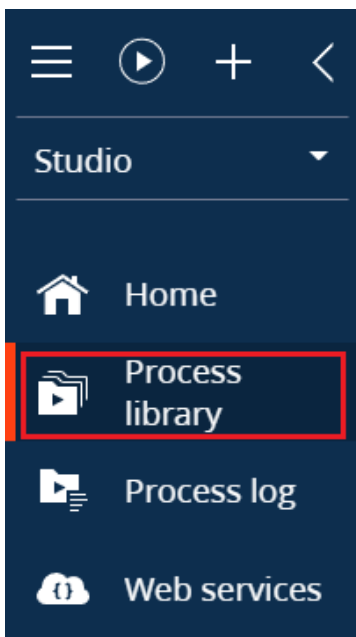



2. Setting up the implementation of the SCL scoring process

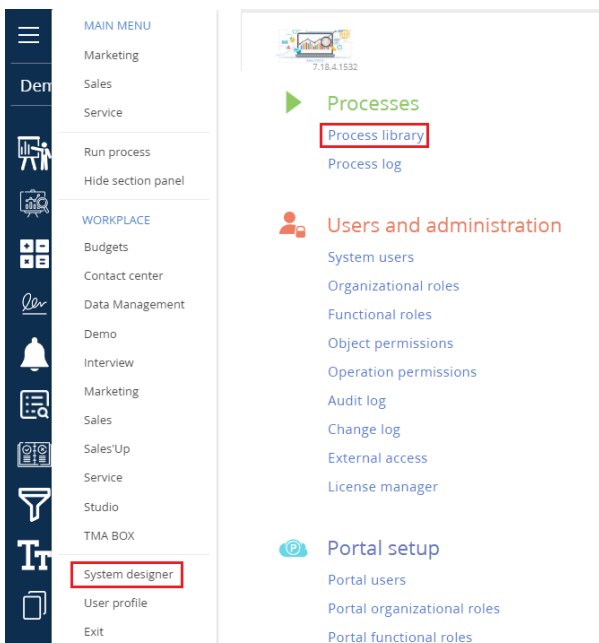


2.1. Process library

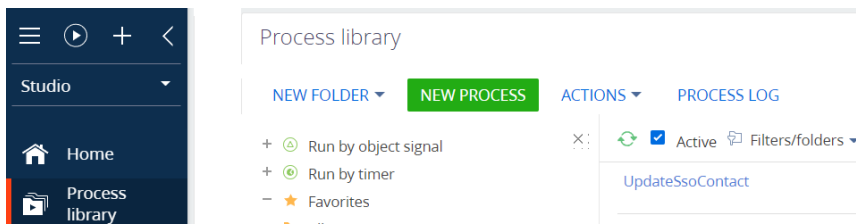
Configuration of SCL scoring process takes place in «Process library» section.



Another way to go to the system designer is to click on the  icon in the upper left corner of the page:



In the "Process Library" section, select the "Scoring Process":



2.2. SCL scoring process settings description

The opened window shows the scheme of the SCL scoring process.



The toolbar (top left corner) contains control buttons that allow you to:

- a. Save – save the record
- b. Run – run the process manually
- c. Cancel – cancel the changes