Creatio Academy

Mobile app

Version 8.0

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Get started with the mobile app setup

PRODUCTS: ALL CREATIO PRODUCTS

The mobile application is used to work with Creatio on mobile devices and is a supporting tool to the primary Creatio application. You can use the configured mobile application for meetings, exhibitions, presentations, etc.

Note. The mobile application is only available for users of the primary Creatio application and cannot be used by the portal users.

To use a mobile application, you should perform some preliminary settings.

You can configure the list of mobile application sections using the mobile application wizard. To reduce the synchronization time between the mobile and primary applications, we recommend setting up only the sections that you will use.

Attention. To ensure the correct operation of the mobile application, make sure the mobile application version is no lower than that of the Creatio primary application.

After you install the mobile application and log in for the first time, the application will be synchronized with your Creatio desktop application. Depending on the mobile app operation mode (online or offline), further synchronization steps may differ.

You can set up automatic synchronization, switch workplaces, and view information about the last synchronization on the mobile application settings page.

System requirements for mobile devices

To install and use the Creatio mobile application, the user's phone/tablet must meet the system requirements below:

Characteristics	**iOS**	**Android**
Supported version (minimal)	11.0	7.0
Recommended version	Latest version available	9.0
Supported devices (minimal)	iPhone 6s	Nexus 7
Recommended devices	• iPhone 8 or higher; • iPad 3 or higher,	Google Pixel or higher.

Install the app

Creatio mobile application is available on:

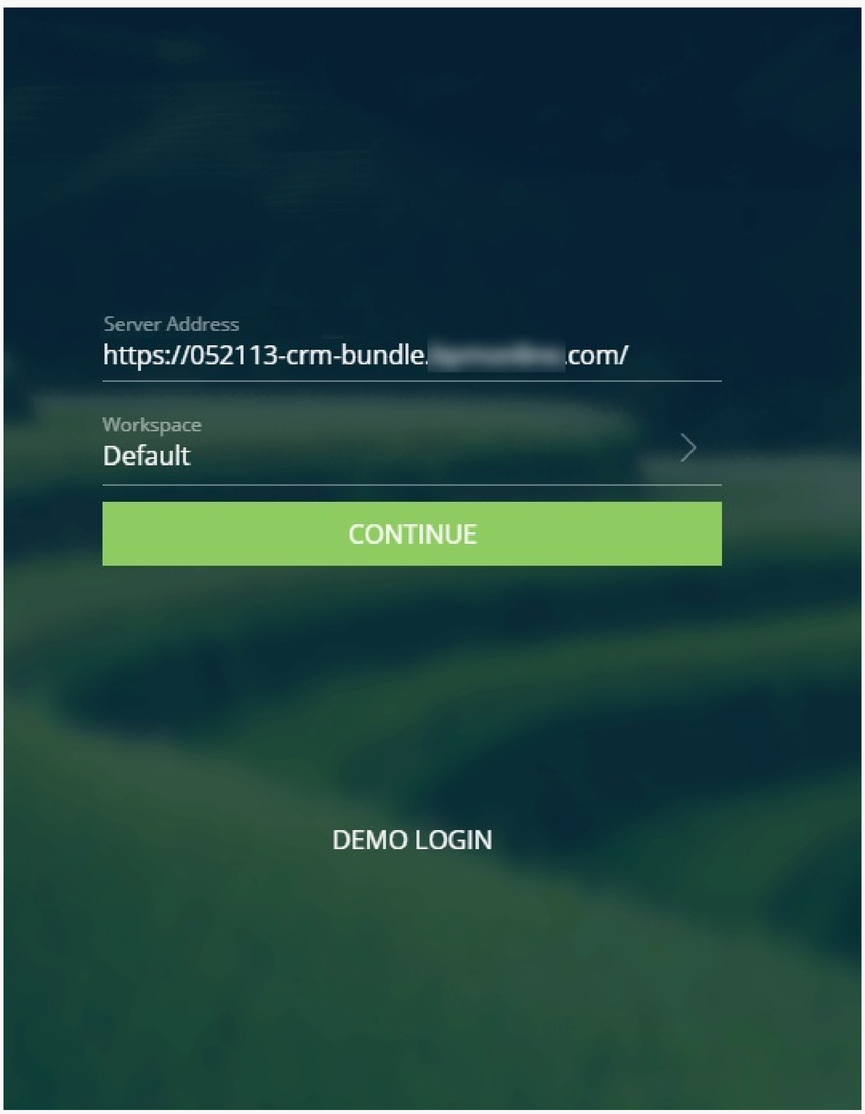
- The App Store for iOS users.
- The Google Play Store for Android users.

The mobile application will be synchronized with Creatio upon the first login.

> **Attention.** A certificate signed by a certification authority is required to sync with Creatio on-site. Mobile application security policies do not support connections to sites that use self-signed certificates.

Enter the address of the Creatio server, specify the workplace and tap the [*Continue*] button (Fig. 1) to log in to the mobile application. If SSO is configured, you will see a login and password form on the identity provider page. If SSO is not configured, enter your login and password and tap the [*Login*] button.

Fig. 1 Logging in Creatio mobile app



Note. Connection protocols (HTTP://, HTTPS://) are determined by the application automatically. You can specify the connection protocol manually if the application is unable to determine the protocol.

After this, the mobile application will start the synchronization process with the primary Creatio application. After the synchronization is complete, the mobile appl becomes operational.

Tap the [*Demo login*] button to connect to the demo version. After this, the mobile application will be synchronized with the demo database.

Note. Login and password are not required to access the demo version. The application opens automatically after the synchronization.

Note. The [*Demo login*] button is displayed if you have not synchronized your app with a Creatio database yet. If you did, then to access the demo database you will need to clear the application cache.

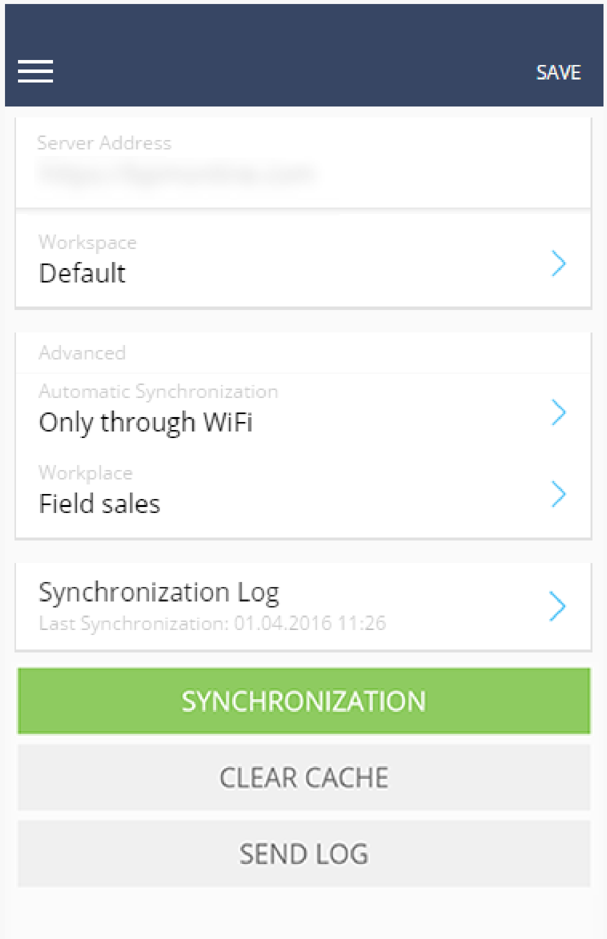
Mobile application settings

Use the mobile application settings page to:

- Specify the connection parameters with the primary Creatio server
- Select a workplace and synchronize the mobile application
- Log out of the application
- Clear application cache (Fig. 2)

To open the settings page, tap the [*Settings*] button in the main menu of the app.

Fig. 2 Mobile application settings page

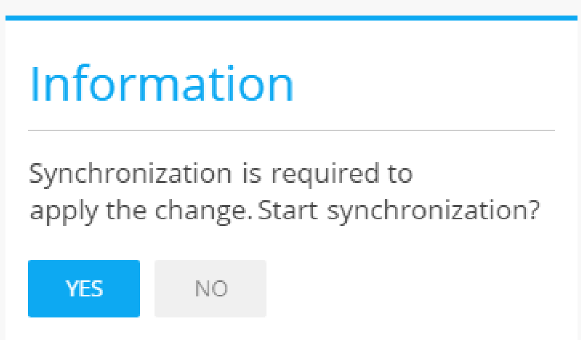


Note. To connect to a different Creatio server, enter the address in the [*Creatio server address*] field, and specify your username and password for that server. Then tap the [*Synchronization*] button.

Select a workplace

To switch workplaces while working in the mobile application, tap the [*Workplace*] field, and select one of the available workplaces. The mobile application will need to be synchronized again after switching to a different workplace (Fig. 3).

Fig. 3 Synchronizing the mobile application after switching to a new workplace



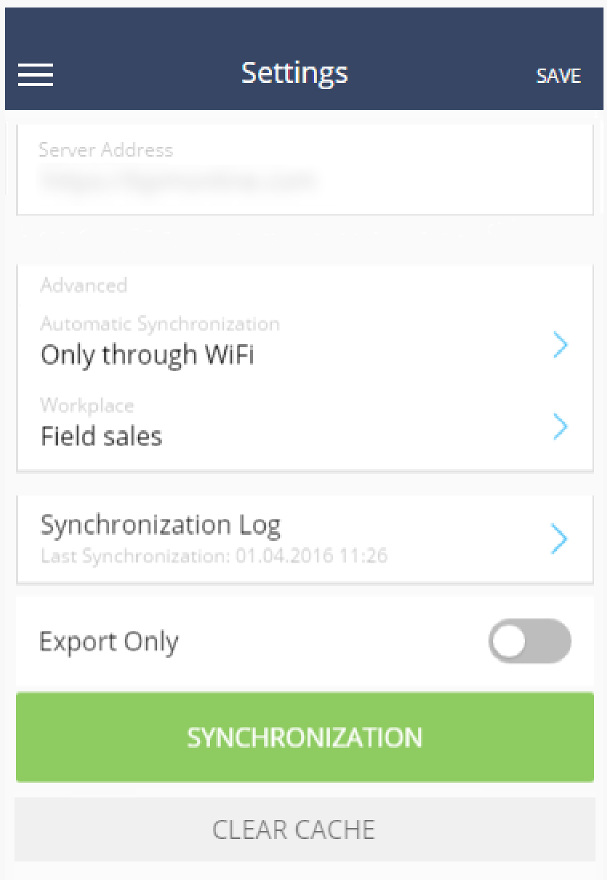
Note. The workplaces of the mobile application are set up in the Mobile Application Wizard, which is available in the primary application.

Clear cache and synchronize

During the synchronization with the primary Creatio application, the database structure and other information are downloaded by the mobile application.

If the database structure changes (it does when you add new sections and details to the mobile application), the structure is updated in the mobile application. For proper synchronization of the modified structure, delete the outdated database structure and data that are stored in the cache of the mobile application. To do so, tap the [*Clear*] cache button (Fig. 4).

Fig. 4 Clearing mobile application cache



Note. Clearing the cache will discard all changes in the mobile application that were not synchronized with the primary application. It is recommended to run the synchronization before clearing the cache.

Message operation modes

There are two modes available for the mobile application in Creatio: “online” and “offline”. You can select the mode in the “Mobile application operation mode” (MobileApplicationMode) system setting in the desktop application.

> **Note.** Regardless of the working mode, mobile devices only display data that the users have permission to access.

Online mode

If you select the online operation mode, manual synchronization is not required. Synchronization with the Creatio server is performed automatically, in real-time, i.e., if you add a task using the mobile application, the task will be immediately displayed in the main application and vice versa. The  icon is displayed in the top right corner of the app to indicate a stable Internet connection in the online operation mode.

Hybrid mode

Hybrid mode is a type of online mode. It lets the users access the data seemingly in real-time, even without having a stable Internet connection. The hybrid mode **turns on automatically** whenever the Internet connection disappears. Hybrid mode enables:

- Working with recent records in all sections. “Recent records” are the last 10 records that the user interacted with.
- Creating new records.
- Work with the schedule.

The  icon is displayed in the top right corner of the app to indicate no Internet connection in the hybrid operation mode.

After the connection is restored, the app resumes real-time automatic synchronization with the primary application.

> **Note.** Note that hybrid mode is not available when using the “Field sales for Creatio” and “Pharma Creatio” Marketplace applications.

> **Attention.** If the same record (for example, the duration of the activity) has been changed in both the desktop and the mobile application, the conditions for saving these changes after synchronization will depend on the order in which the changes were made. Creatio will save the latest changes.

Offline mode

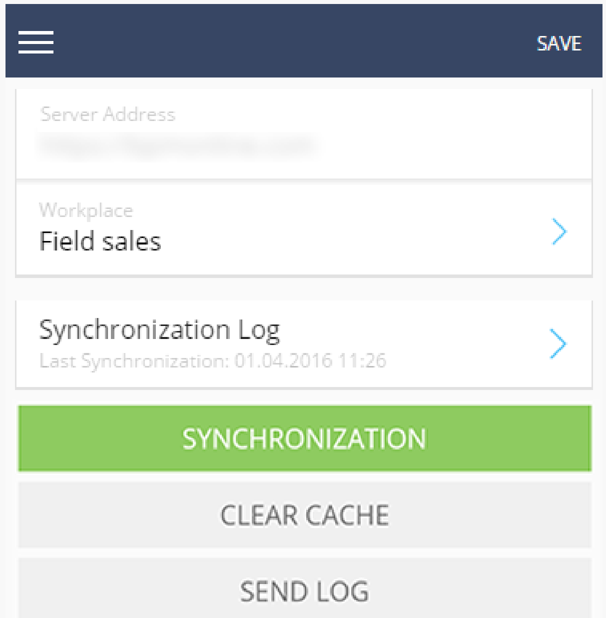
In the **offline** mode, the mobile app user should synchronize periodically with the primary Creatio application. Synchronization with the primary application is performed via the DataService web service.

Changes made to the mobile application are saved on the Creatio server only after synchronizing with the primary application. If there were any conflicts during synchronization, they will display in the synchronization log.

To synchronize manually in the “offline” mode:

1. Tap the button and select [*Settings*].
2. Tap [*Synchronization*] (Fig. 5) on the page that opens.

Fig. 5 Running synchronization in the mobile application



As a result, the data from the primary application will be displayed in the mobile application and the primary application will display the records that were created using the mobile application.

Attention. If the same record (for example, the duration of the activity) has been changed in both the desktop and the mobile application, the conditions for saving these changes after synchronization will depend on the order in which the changes were made. Creatio will save the latest changes.

For example, whenever an opportunity advances to the next stage, a business process creates new activity. When this happens, synchronization with the primary application is performed. The business logic of creating an activity is handled on the primary application, then the created activity is displayed in the mobile application.

A user working in the “online” mode will not notice this because the application will be working directly with the server. The new activity will appear in the mobile application immediately after the corresponding business process completes, with no need for manual synchronization. Users who work in the “offline” mode will need to run synchronization for the activity to be displayed.

Synchronization log

The synchronization log is available only in offline mode. The log displays the date of the last synchronization and any conflicts that occurred when records were last synchronized with the desktop application.

The [*Log*] tab includes a list of all conflicts found during the previous synchronization. Conflict details are specified for each record individually.

The [*Pending changes*] tab includes all data that were not yet exported to the desktop application during the last synchronization attempt.

Depending on the conflict, clicking the record in the log will display the following actions:

- [*Revert changes*] - undo all changes and delete the record from the synchronization log. If triggered, the local copy of this record will be overwritten with the server (desktop application) copy. For example, your system administrator took away your rights to edit an account’s type. A conflict occurs once you edit the [*Type*] field and attempt to synchronize with the desktop application. To resolve this conflict, you can undo the changes and re-synchronize. Learn more about how to deal with synchronization conflicts that occur due to lack of permissions in the “Mobile application FAQ” article.
- [*Go to record*] - opens the record edit page. For example, a field that could previously be left blank is now required. Creating a new account without populating this field will result in a conflict during the next synchronization attempt. To resolve this conflict, open the record edit page, populate the required field, and re-synchronize.
- [*Request access*] - opens your preferred mobile mail client and creates a template of a request to provide the permissions necessary to complete the synchronization.

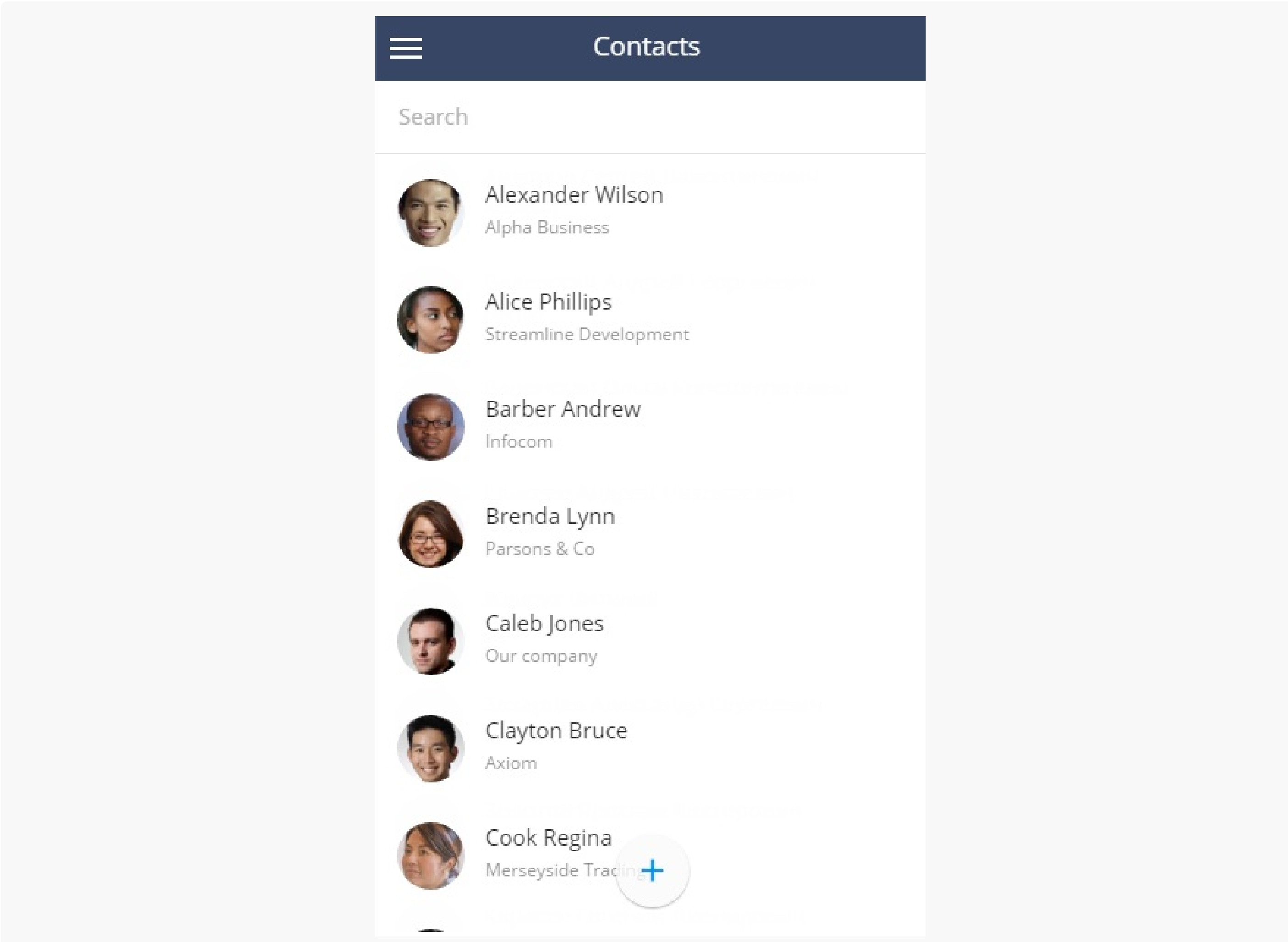
Note. To send requests to system administrators, please make sure that their correct email address is specified in the “Email for sending permission requests” system setting.

Get started with the mobile app UI

PRODUCTS: ALL CREATIO PRODUCTS

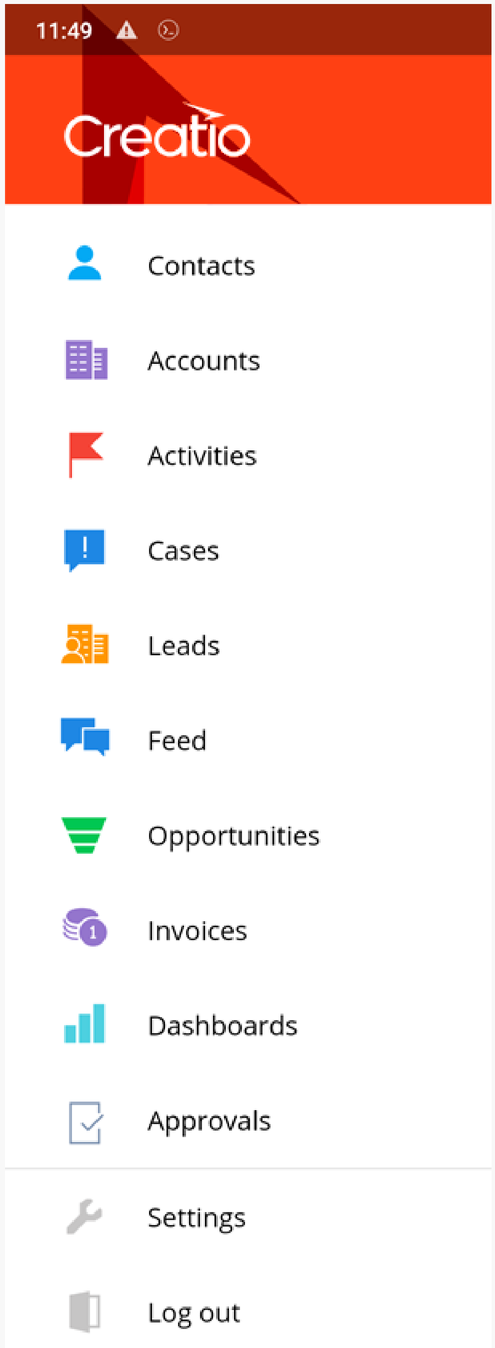
After synchronizing with the Creatio server you can start working with the mobile application (Fig. 1).

Fig. 1 Mobile application workplace



Tap to access the main page (Fig. 2) and move between sections of the mobile application.

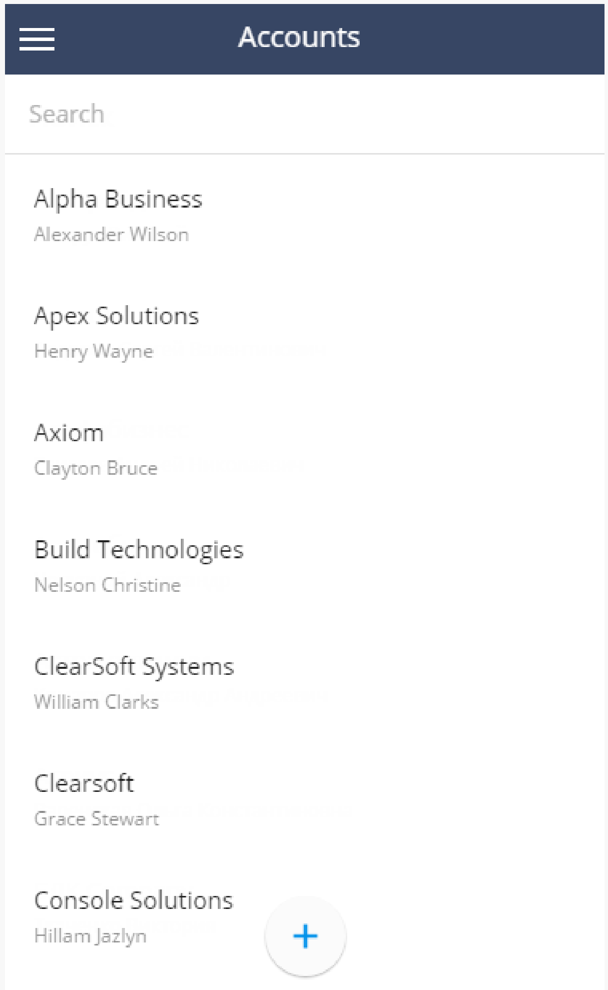
Fig. 2 Mobile application main page



The main page of the mobile application contains a list of sections configured in the mobile application wizard, as well as the Approvals section and the Settings menu.

The mobile application list (Fig. 3) contains a list of section records. The list and display method are configured in the main application

Fig. 3 [*Accounts*] section list of mobile application



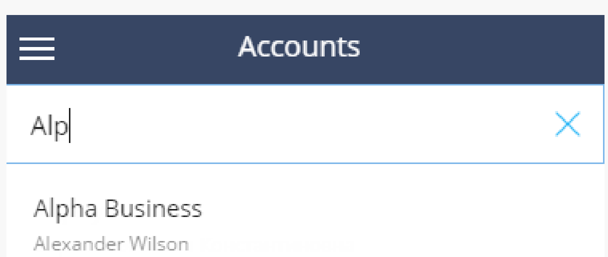
To open the record, tap it in the list.

Search records

To search for a record in a section, enter the search parameters (for example, a fragment of a company name) in the [*Search*] field (Fig. 4). The search is performed in the current section and by the primary displayed column (the first column configured in the mobile application wizard).

For example, enter a fragment of an account name in the [*Accounts*] section, and in a couple of seconds, the result corresponding to the search parameters will be displayed. A search by primary account won't return any search results.

Fig. 4 Search in the section list



To display all the records of a section, clear the search field.

Add records

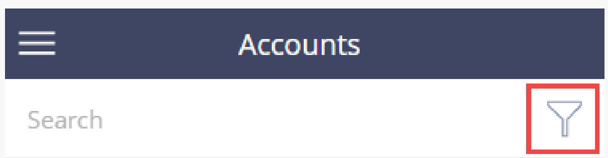
To create a new record, tap the button in the section list. Fill in the page and save the changes.

Filter records

You can filter records in Creatio mobile app sections and details by the values specified in one or more columns. For example, using the filters you can quickly find an account by a name fragment or tasks by a specific customer.

To access the filter, tap the button to the right of the search field (Fig. 5) of the section or detail list. The filter page will open (Fig. 6).

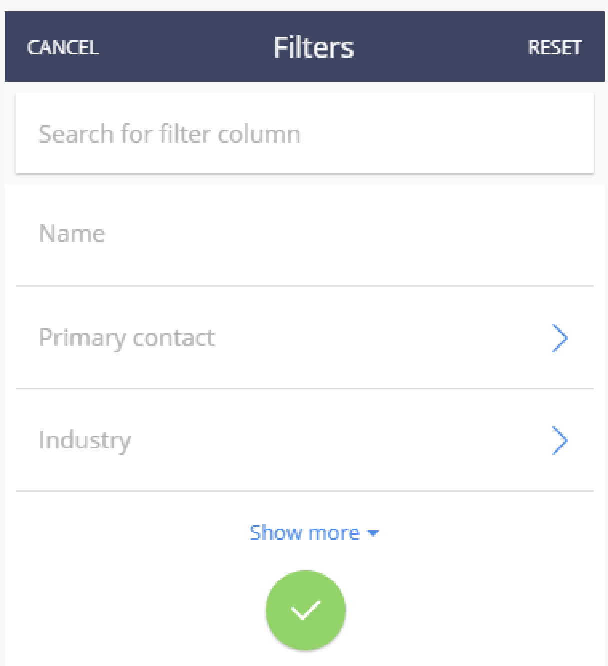
Fig. 5 The filter button in a section



Note. In the [*Activities*] section, the filter is available in the section list view only.

Tap a column that you want to filter records by and specify the filter value.

Fig. 6 The filter page



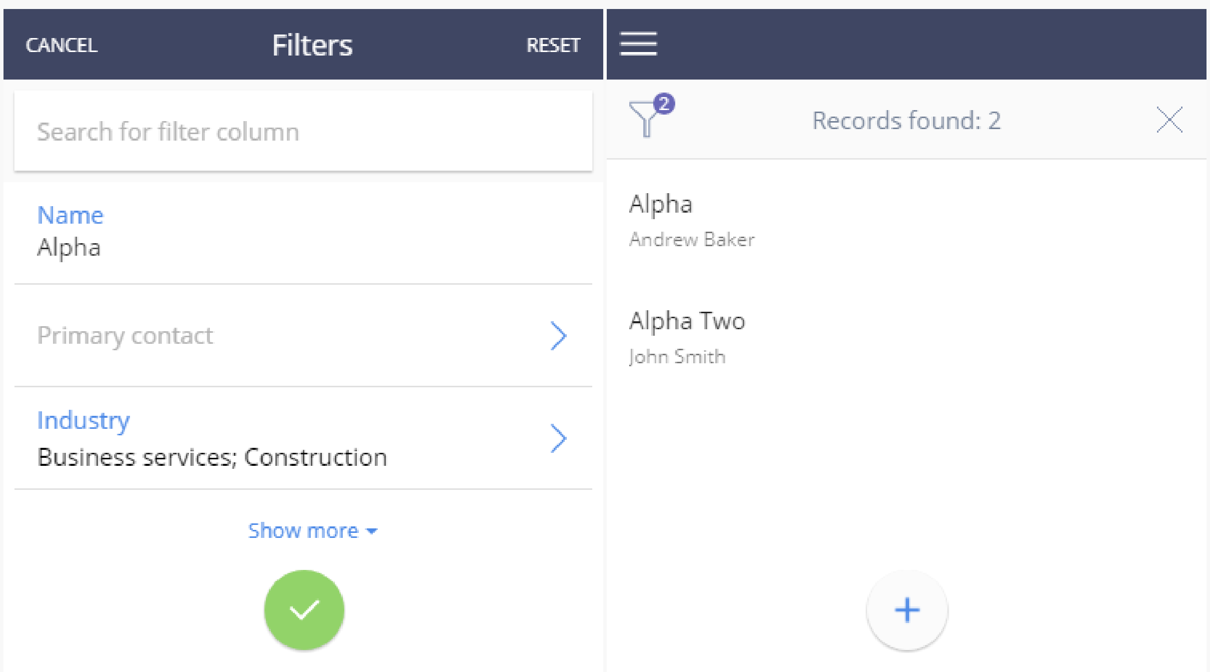
When opened, the filter page displays the same columns as the corresponding section page. If the application is in the online mode, tap [*Show more*] to display all section columns. In the offline mode, only preliminary configured columns will be displayed.

Note. Use the [*Search*] field at the top of the filter page to quickly locate the needed columns.

Note. The columns in the section record page can be configured in the [*Mobile application wizard*] in the System designer of the desktop application.

After selecting the filter values, tap  to apply the filter. Filtered records will be displayed in the section or detail list (Fig. 7).

Fig. 7 Applying filters in a section



The number at the top right of the “funnel” icon represents the number of columns used in the currently applied filter.

Note. If a filter uses several columns, then only the values that match all filter conditions will be displayed after applying the filter (similar to using the "AND" logical operator to group filter conditions in the desktop application).

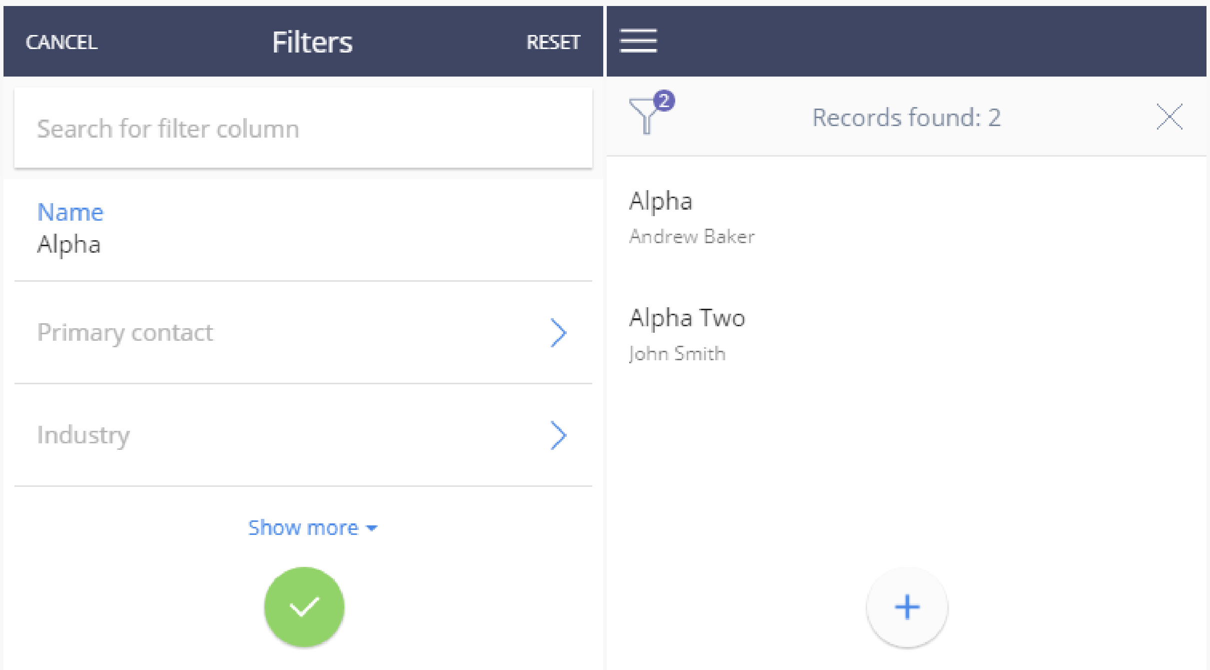
To change the filter conditions, tap .

Tap  to remove the filter.

Note. The filter settings will persist after updating the page or switching sections. The filters will reset upon logout.

You can filter data by string, lookup, numeric, and date columns. For example, if you need to filter data by an account name, tap a text column on the filter page and enter the full or partial filter value using the keyboard (Fig. 8).

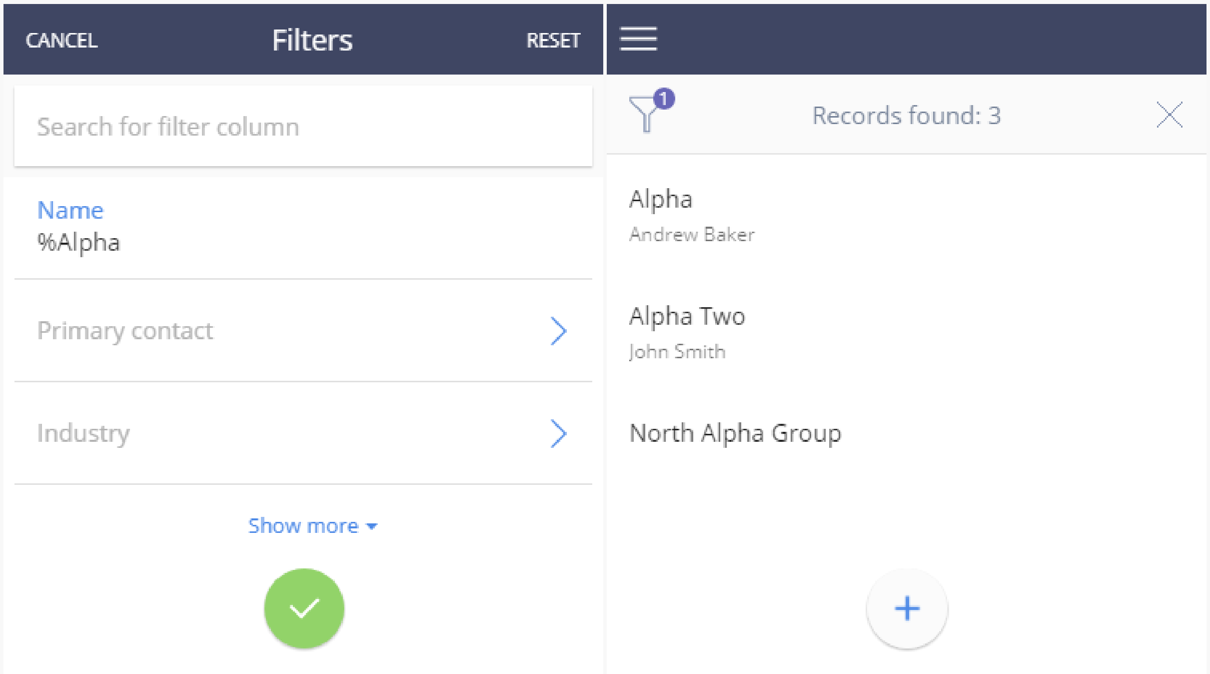
Fig. 8 Filtering by a text column



By default, all text column filters use the “starts with” condition. For example, if you enter the “Alpha” value in the [*Name*] column of the [*Account*] section and apply the filter, all companies with the name starting with “Alpha” will be displayed.

Use the “%” character to set “wildcard” filter values. For example, in the Accounts section, enter the "%Global" as the value of a [*Name*] column filter to display all companies that contain [*Global*] in their names (Fig. 9).

Fig. 9 Using the “%” character to specify text filter values



Edit records

You can edit data either in edit mode or in normal mode (when viewing data).

In view mode, you can make changes to the page's fields and embedded columns. You can also make changes to the page using the actions menu. In section page edit mode all columns are available for editing.

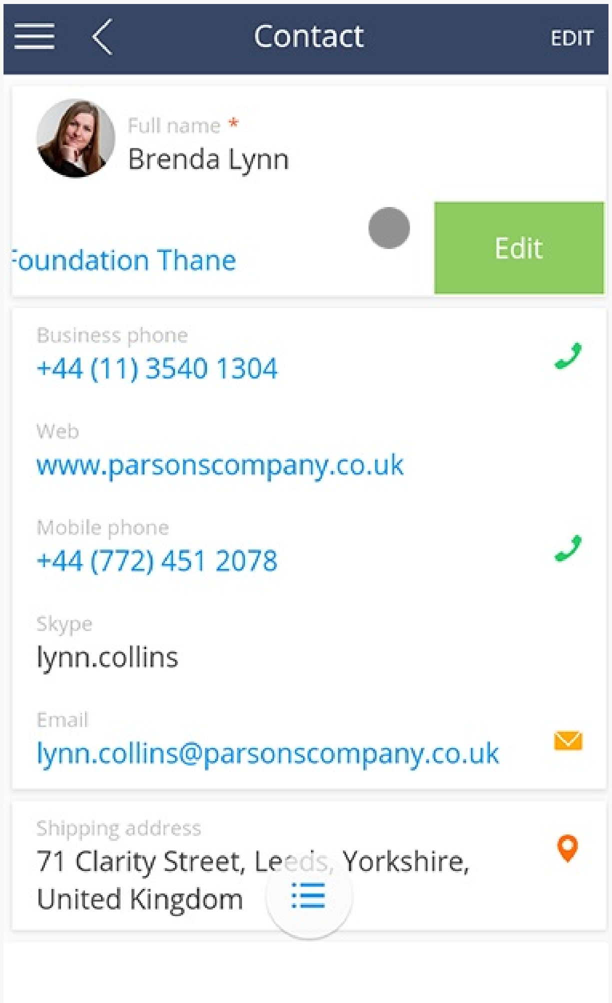
Quick edit

In normal mode (view mode), column values containing main information and communication options are available for editing.

For example, to change the name of the company where the contact works:

1. Open the [*Contacts*] section of the mobile application.
2. Tap and hold the [*Account*] column and drag it through the column to the left (Fig. 10).

Fig. 10 Editing a contact's [*Account*] column



3. Tap the [*Change*] button.
4. Select a value from the lookup.

   Communication options are edited in the same way in view mode.

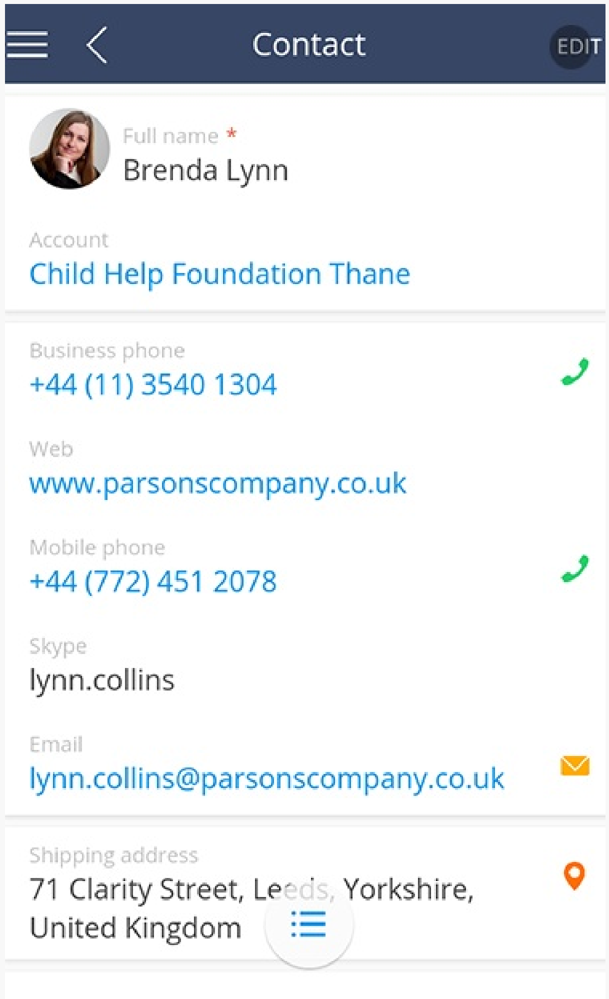
> **Note.** To change, for example, the name of a contact, tap on the column and enter the value.

Edit mode

In the edit mode, you can edit a record:

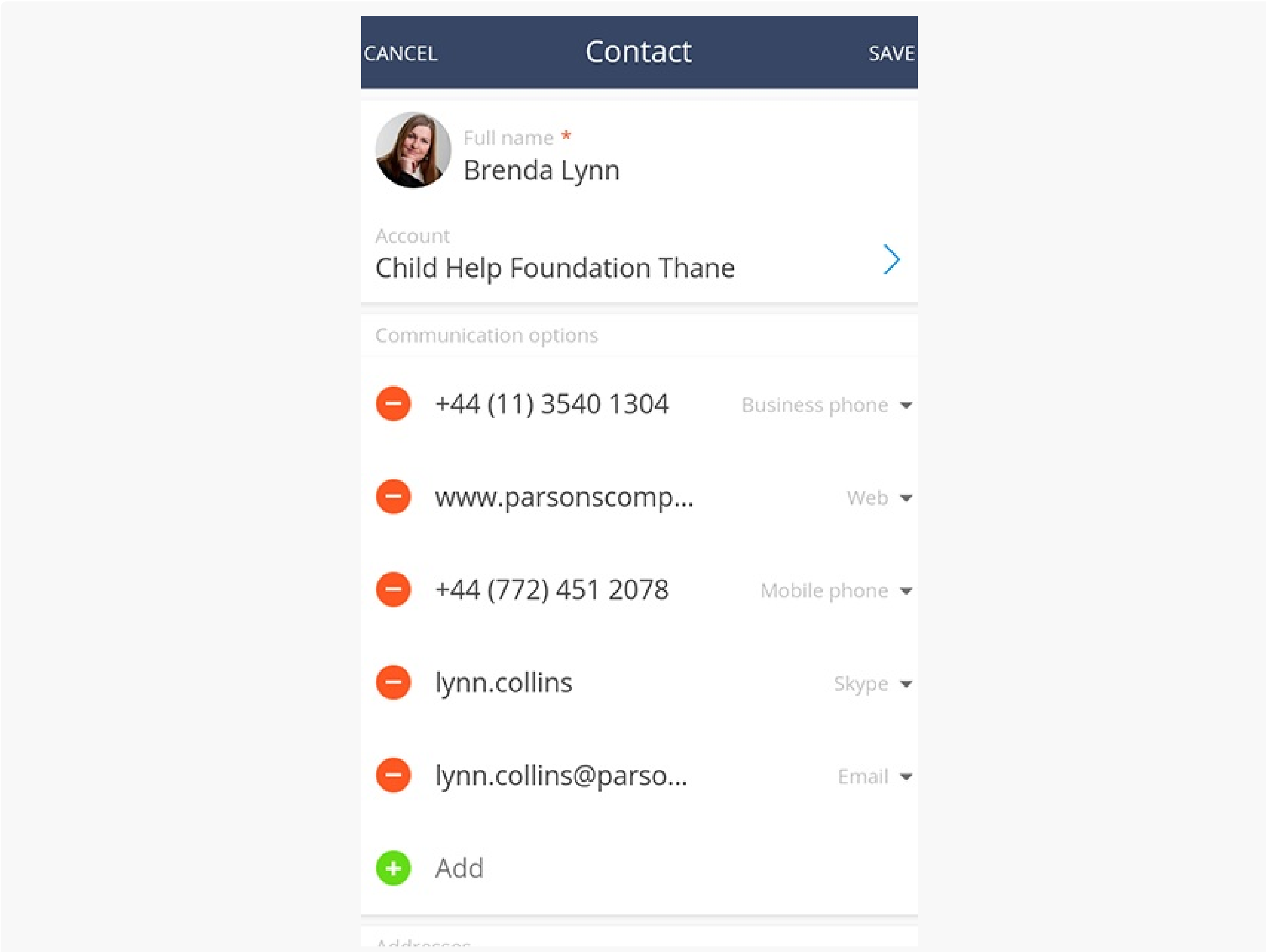
1. Tap the [*Edit*] button in the upper right corner of the mobile application (Fig. 11)

Fig. 11 Editing records in mobile application



2. Enter the required values on the edit page (Fig. 12).

Fig. 12 Editing mobile application section page



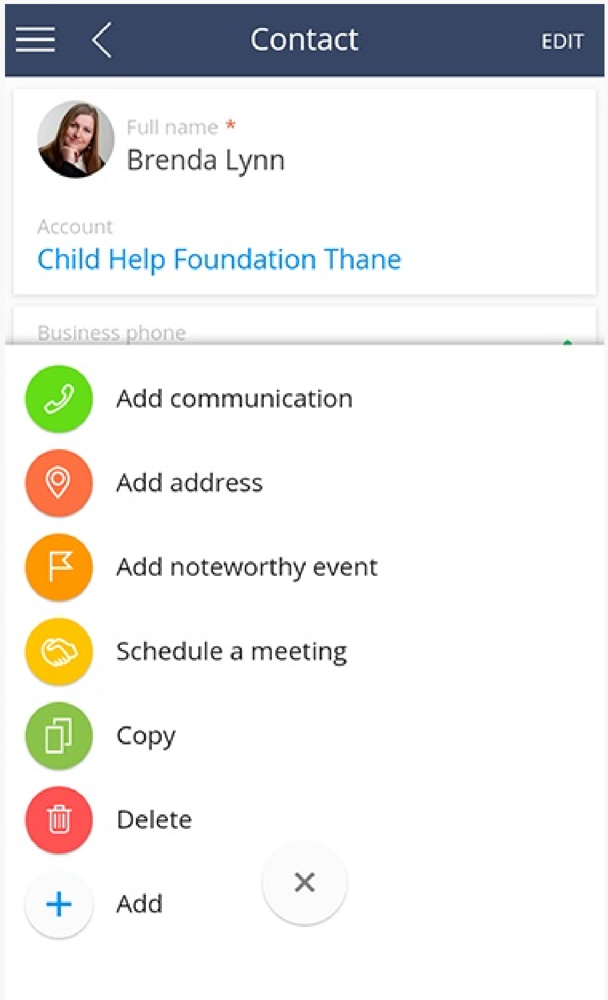
3. Click [*Save*].

Run actions

Tap  in the lower part of the record to access the section actions menu.

The list of actions available in the actions menu depends on the opened section (Fig. 13).

Fig. 13 [*Contacts*] section actions menu

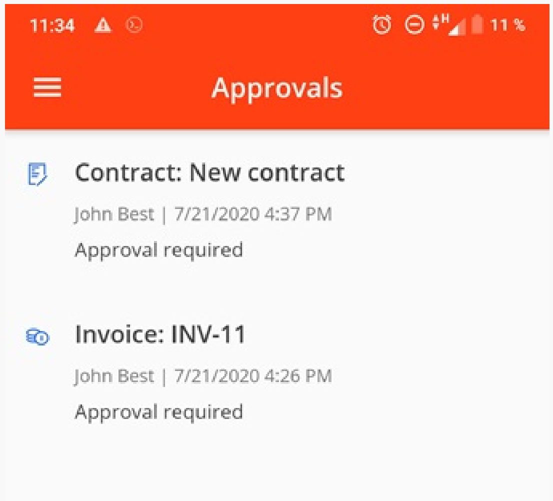


Approve records

The approval functionality of Creatio desktop applications is available in the mobile app as well. After a record is submitted for approval in the main Creatio application, the assignee can approve or reject the record in the mobile app. To do this, use the [*Approvals*] section.

The [*Approvals*] section lists all records submitted for approval, including records from sections normally unavailable in the mobile app (Fig. 14). For example, you can approve a contract and an order using your mobile app, even if the app is not configured to display the [*Contracts*] and [*Orders*] sections. Read more about setting up mobile app sections in the Mobile application wizard article.

Fig. 14 Records submitted for approval in the mobile [*Approvals*] section



Approvals require an active Internet connection.

To process an approval:

1. Open the [*Approvals*] section of the mobile application.
2. **To approve a record**, swipe the record **left**.
3. **To reject a record**, swipe the record **right**.

   A few seconds after the swipe, you can **cancel** your approval or rejection using the cancel button in the notification at the bottom of the app.

   As a result, the record will be approved or rejected. The app will display a notification about a successful approval processing to the approver. The approval status will be changed to “Positive” or “Negative”. The record will be no longer listed in the [*Approvals*] section.

> **Note.** Instead of swiping, you can tap a record in the [*Approvals*] section to open the approval page, then tap [*Approve*] or [*Reject*]. In that case, canceling the approval or rejection will not be available.

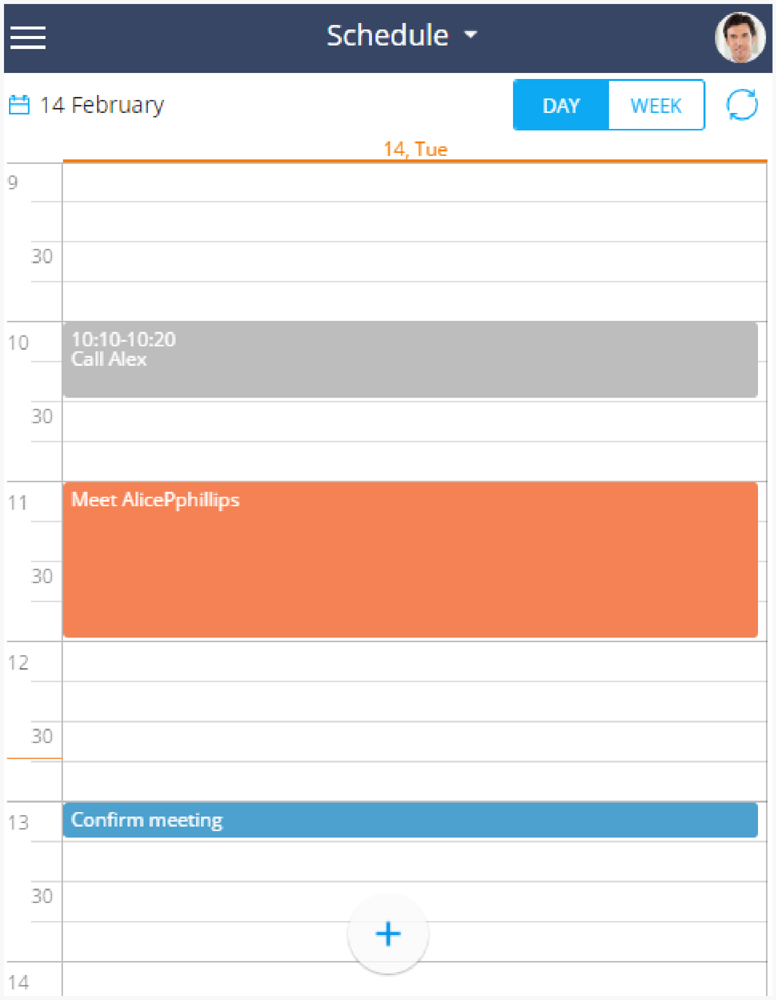
Work with the mobile app calendar

PRODUCTS: ALL CREATIO PRODUCTS

The [*Activities*] section in the mobile application is synchronized with the primary Creatio application and can be used both offline and online (Fig. 1).

Tasks can be displayed either as a virtual organizer or a drop-down list. In the **calendar** mode the tasks which you are responsible for, and those in which you were added to [*Participants*] detail, are displayed. In the **list** mode, only the tasks for which you are responsible are displayed. You can select the view (drop-down list or calendar) in the upper area of the workspace area.

Fig. 1 [*Activities*] section of mobile application



Depending on the size of your mobile device screen, the default calendar view is for the current day or the current week. If necessary, you can change the display period of the schedule.

To change the display period for tasks in the calendar, tap DAY WEEK and select the required time interval.

Tap anywhere on the blank calendar space and swipe right to go to the next day or left to go to the previous day.

> **Note.** The calendar view period can differ due to the work limitations of different mobile devices. For tablets: the schedule in the [*Activities*] section can be changed to weekly or daily mode. For mobile phones, the schedule is always displayed daily in portrait view and weekly in landscape view.

The current time is indicated with an orange line.

In the calendar area, all activities are displayed as rectangular blocks whose height corresponds to the duration of the activity.

On the left side of the calendar area, time intervals are displayed.

Activities in the calendar view are highlighted with different colors depending on their status and due date.

- Activities are highlighted in red when their due time has already passed and are not in the final state yet.
- Activities are highlighted blue when their due time hasn't passed and are not in the final state yet (scheduled or

in progress)

- Grey is used to highlighting activities that are in the final state (completed or canceled).

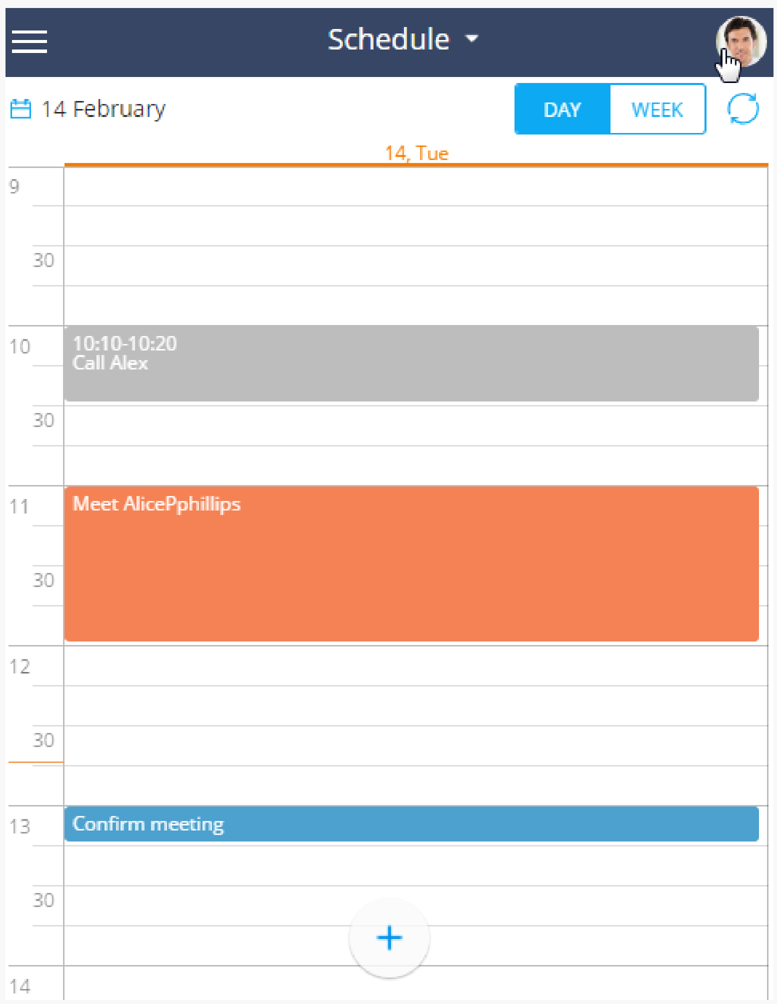
View someone else's calendar

The ability to view the calendar of another owner is only available in online mode.

To view the calendar of another owner:

1. Tap the [*Edit*] button in the upper right corner of the mobile application (Fig. 2)

Fig. 2 Changing owner to view the calendar



2. Select an owner in the drop-down list.
3. To get back to your calendar tap the [*My activities*] button in the owner's drop-down list.

Add a task

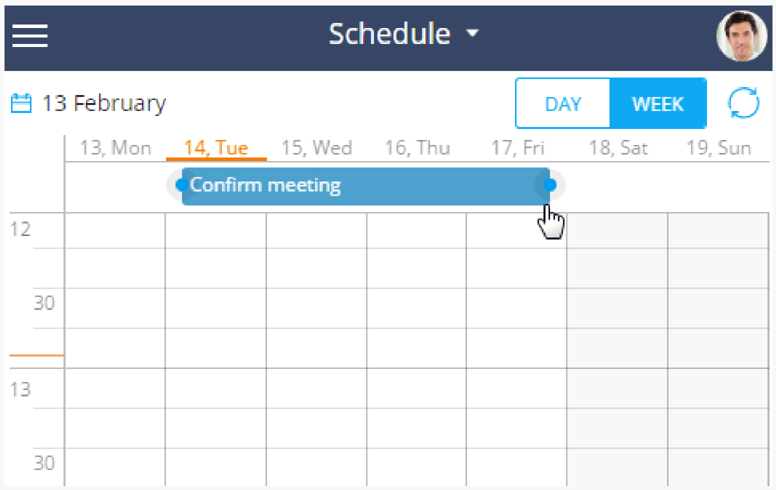
To create a new task in the [*Activities*] section, tap the button. Then, fill in the required information and tap [*Save*].

When working in the mobile application you can create multi-day tasks (tasks lasting for more than one day).

To create a multi-day task:

1. Highlight a task in the calendar.
2. Drag a task to the panel with the days of the week.
3. Hold the small circle on the corner of the activity bar and drag it to expand the activity to the required range (Fig. 3).

Fig. 3 Creating a multi-day task



Task actions

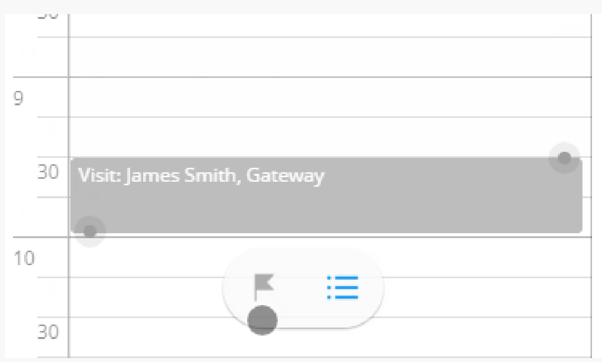
You can change the duration of an activity. To do this, tap the activity, hold the circle at the corner of the activity ( ), and drag it to the required time. To move an activity to another time, drag it to the required time interval.

To change the task status, go to the activity edit mode and select the required value in the [*Status*] field.

If you need to mark a task as completed, tap the button in the calendar and then tap the button.

To return a task to its initial state, select it in the calendar and tap (Fig. 4).

Fig. 4 Changing status of a completed task



The actions menu is used for **copying**, **deleting**, and **splitting** tasks. To view the options, highlight a task and tap .

You can split an activity based on the time of the end and the beginning of overlapping tasks.

When copying a task from the calendar, the [*Participants*] details are also copied. When copying from the activity page a new page is created in which you can fill in all the required information.

In the online mode, you can also display **activities created in the Creatio main application**. To do this, use the [*Refresh*] action.

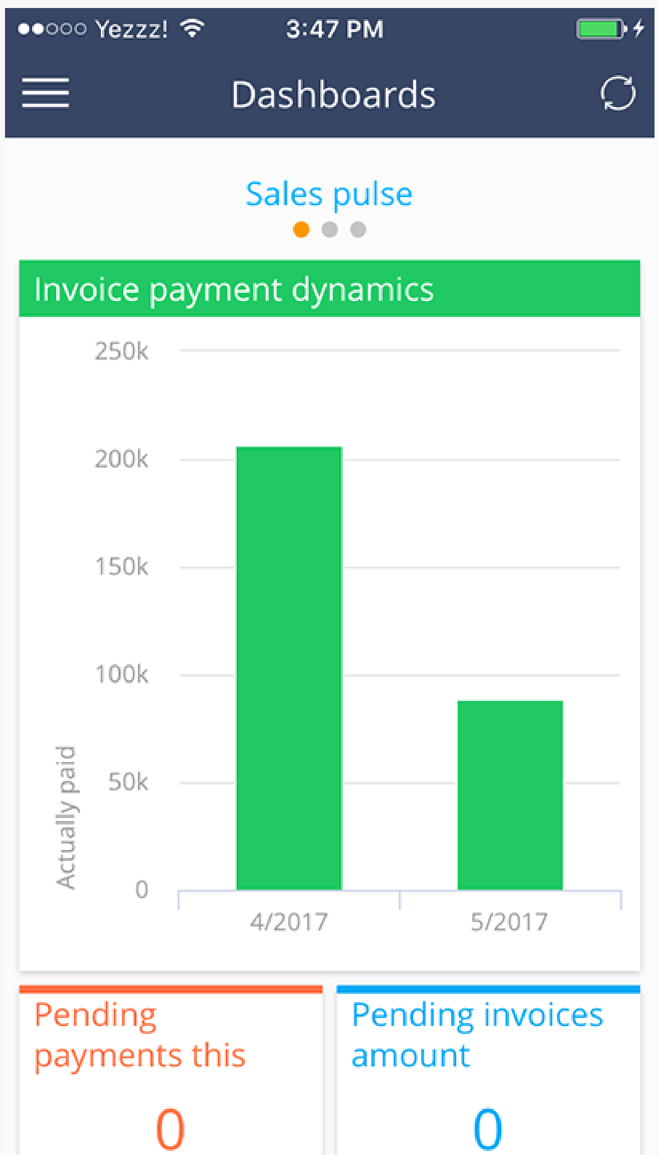
Work with dashboards in the mobile app

PRODUCTS: ALL CREATIO PRODUCTS

The [*Dashboards*] section of the mobile application is used to display collective data from the [*Dashboards*] section of the primary Creatio application. (Fig. 1). The data displayed in the section is based on access rights.

We recommend using this section to analyze and plan the work of each employee, each department, and the company as a whole.

Fig. 1 The [*Dashboards*] section in the mobile application



Attention. An Internet connection is required to use the [*Dashboards*] section, regardless of whether the application is run in the online or offline mode. Learn more about the online/offline mode in a separate article.

The section data is cached in the mobile application. Press the button to refresh the section. Cached data is cleared when you exit the section or close the mobile application.

Each [*Dashboards*] section tab of the main Creatio application is displayed on its respective screen in the mobile app. The tablet version of the mobile application features the dashboards view similar to that of the desktop version. All graphs are scaled to fit different screen sizes. The element size is doubled in the smartphone version of the mobile application. Indicators that occupy less than 50% of the screen in the main application will occupy 50% of the screen of the smartphone.

Swipe left and right to switch between different tabs/dashboards or use the list of dashboards for navigation.

The following dashboard types of the primary Creatio application are available in the mobile version: “Chart”, “Metric”, “List” and “Gauge”. Additionally, mobile dashboards support graphs with multiple series and all sub-types of the “Chart” dashboard. Unsupported dashboard types are hidden in the smartphone version of the mobile application and greyed out in the tablet version (Fig. 2).

Fig. 2 Unsupported dashboard types in the mobile application

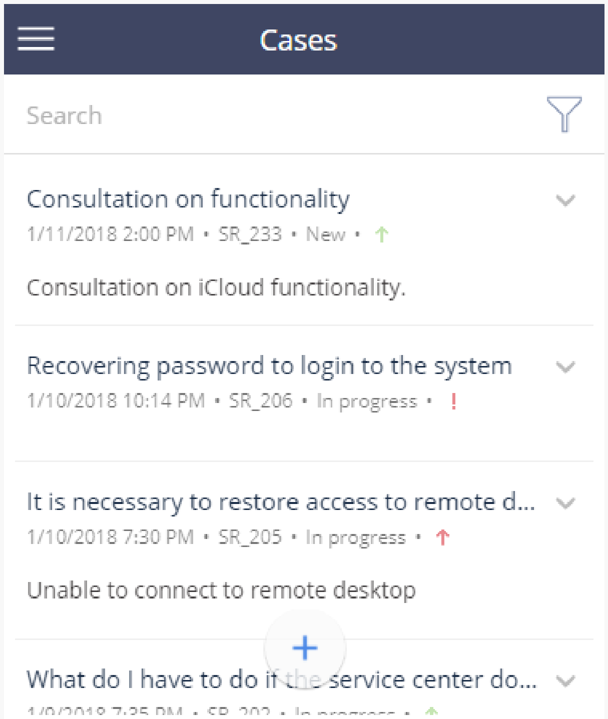
Click on a graphic element (e.g. a column) to display a data label. Use the scrollbar to view larger charts (select the element to activate the scrollbar).

Work with service cases in the mobile app

PRODUCTS: SERVICE CREATIO

The [*Cases*] section (Fig. 1) in the mobile app is used for managing cases (incidents and service requests, claims, etc.) received by the help desk or contact center.

Fig. 1 Case section



To open the [*Cases*] section, tap the button on the mobile app main menu.

The section is available by default in any mobile app synchronized with a desktop Creatio product that has the [*Cases*] section. There is no need to set it up in the mobile application wizard. The [*Cases*] section enables you to:

1. register cases (for example, create internal service requests),
2. view case status,
3. add information about case resolution,
4. post messages on the customer portal,
5. escalate cases (only for applications synchronized with Service Creatio, enterprise edition).

The following fields are displayed by default for each record in the list of the [*Cases*] section: [*Subject*], [*Registration date*], [*Number*], [*Status*], and [*Description*]. The icon at the right of the case record represents case Priority:

1. Low.
2. Medium.
3. High.
4. critical.

Tap the button at the top right of the list record to display the quick action menu. The [*Cases*] section features the case feed accessible via the action menu.

Note. You can configure the list via the mobile application wizard, available in the system designer of the desktop application.

The [*Cases*] section has the standard search field and filter options.

Create a new case

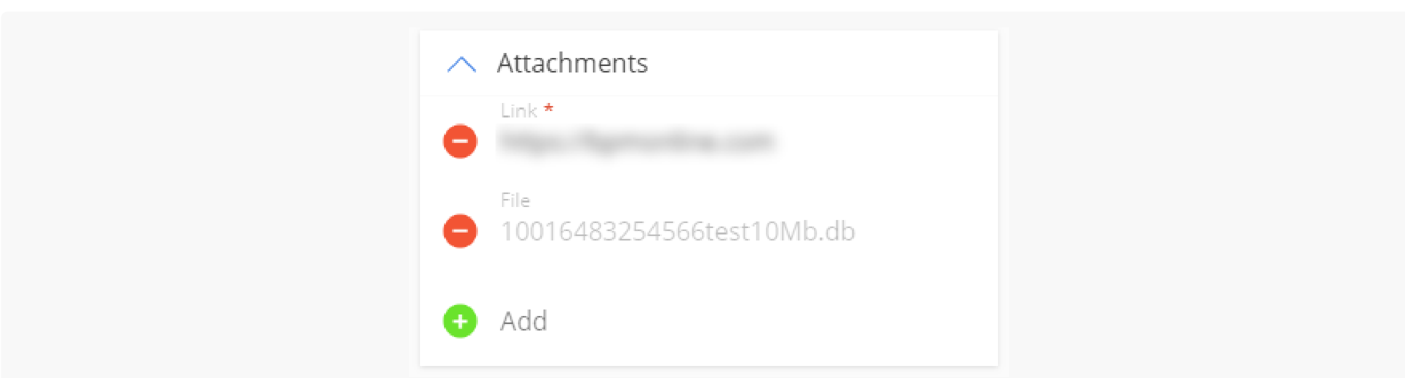
To register a new case:

1. Tap to open the [*Cases*] section.
2. Tap the button. The case page will open.
3. Fill out the required fields:
    a. Specify the case subject.
    b. Select the customer for this case in the [*Contact*] or [*Account*] field. One of these fields must be populated. If the [*Account*] field is populated, the list of contacts will display only the contacts of this account. If the [*Contact*] field is filled in, the [*Account*] field is automatically filled in with the account specified for this contact.
4. Complete the case profile:
    a. Select the case category (incident or service request).
    b. Specify the assignee or assignee group for the case.
5. Save the case.

As a result, a new Creatio case will be added. Creatio automatically generates the case number by a pattern specified in the “Case number mask” system setting (CaseCodeMask).

The [*Attachments*] detail (Fig. 2) contains files and links related to the case. Tap and select an attachment file.

Fig. 2 [*Attachments*] group



You can also add case attachments using the [*Add file or link*] action () in the actions menu of the record.

Process a case

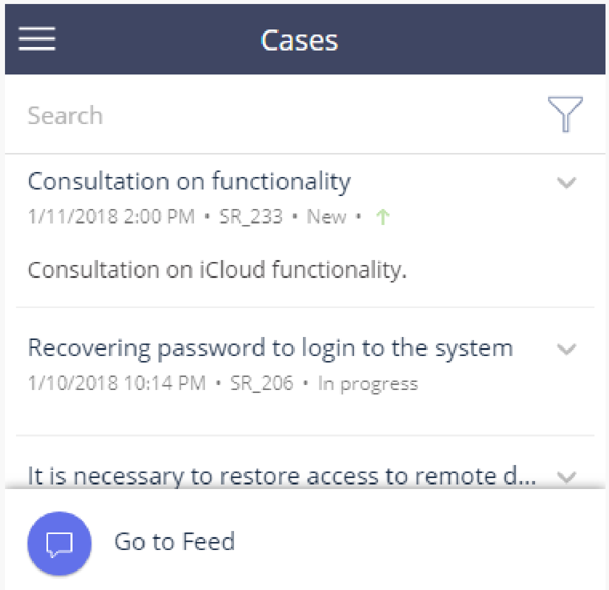
Mobile application functions enable you to post messages in the case feed (for internal communications) or communicate with the case customer on the portal. If your mobile app is synchronized with a product that contains service enterprise functions, you can also escalate cases.

Post internal messages

There are two ways of posting messages message in the feed:

1. **From the main menu:** tap to open the cases section, locate the needed case and tap button, then select the [*Go to Feed*] command (Fig. 3).

Fig. 3 Case feed menu



2. **From an opened case page:** tap , then tap the [*Go to Feed*] command.

   Once the feed page opens, tap to post a new message. Type the message and tap the [*Publish*] button.

Reply to the case customer

To post a message on the self-service portal:

1. **To access a case from the main menu**, tap → the required case record in the section list.
2. **To access the portal from the case page:** tap → [*Post message on the portal*].

   Once the portal page opens, type the message and tap the [*Publish*] button.

Escalate the case

To escalate a case to another support level:

1. **To access a case from the main menu**, tap → the required case record in the section list.
2. **To access the escalation from an opened case page**, tap → [*Escalate*] (Fig. 4). Specify the support line and new assignee or assignees group on the opened escalation page (one of the fields has to be filled in).

Fig. 4 Case escalation

View processing history

This detail displays the history of communications with the case customer, as well as internal communications and automatic notifications. The processing history includes:

1. Emails sent and received during the case resolution process.
2. Internal notes posted by employees in the case feed.
3. Messages posted by employees and portal users on the customer portal.

   The detail also contains system messages that inform you about various system-wide events that are connected to the case.

Fig. 5 Processing history screen

Mobile application FAQ

PRODUCTS: ALL CREATIO PRODUCTS

Why won’t the mobile app sync in online mode (Error "Item% 24 batch not found)?

Online sync errors are often associated with the “on-site” deployment of Creatio. Certain combinations of the IIS, .NET Framework, and ASP.NET services screen special characters ($ character) in website URLs. The mobile app cannot connect to the Creatio website because of that.

To omit the “$” character while generating request URLs, introduce a different type of query generation by setting up configuration files on the Creatio server. To do this:

1. Open the [*Creatio root directory path*]\Web.config file with any text editor, e.g. Notepad. Find the <appSettings> part and add the following line:

```
<add key="aspnet:UseLegacyRequestUrlGeneration" value="true" />
```

   Save the changes.

2. Make the same adjustments to the [*Creatio root directory path*]\Terrasoft.WebApp\Web.config configuration file.
3. Restart the web site in IIS and clear the Redis server cache.

How to resolve the synchronization conflict in the offline mode?

If the conflict occurred because of access permission during the synchronization with the desktop application, you can resolve it by canceling the modifications you made in the mobile application.

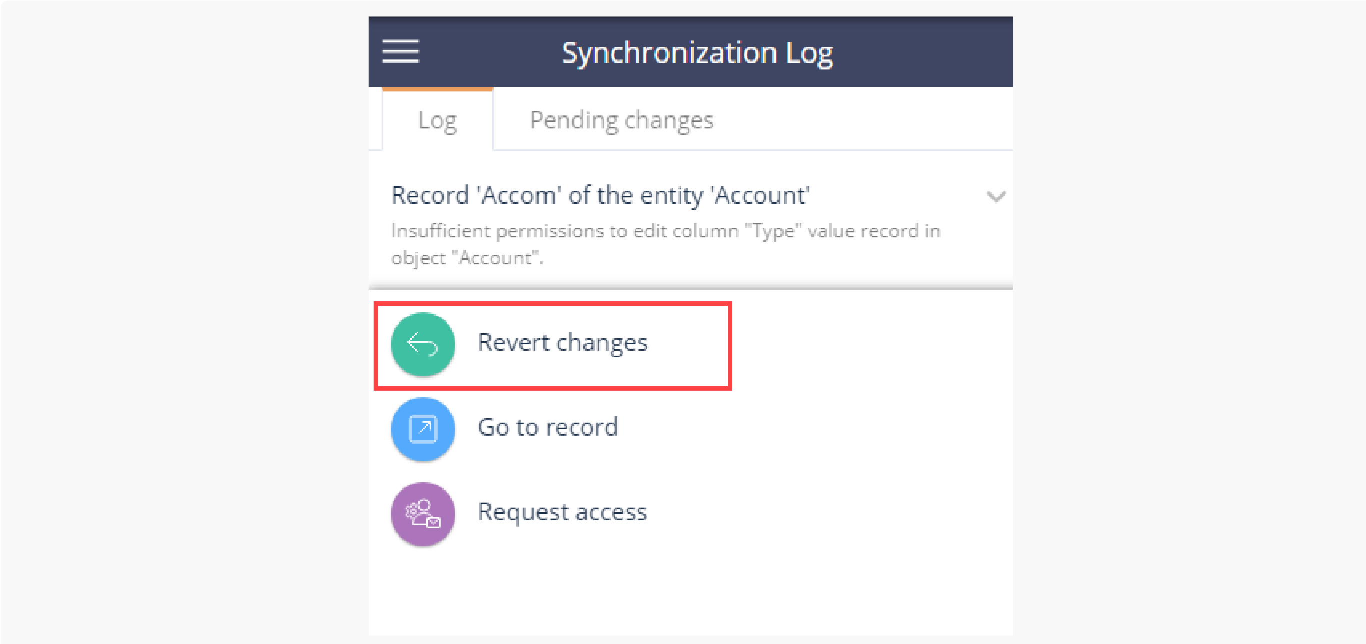
Case. The administrator has restricted the access rights to edit the account type for all employees (Fig. 1). The mobile user changes the account type in the offline mode. During the synchronization process, the user gets a notification about conflict (Fig. 2).

Note. Managing user access permission to the system objects is covered in the "Users and access management" guide.

To resolve the conflict:

1. Tap the [*Review issues*] button.
2. Select a record that invoked a conflict of insufficient permissions in the synchronization log.
3. Tap the [*Revert changes*] button (Fig. 1).

Fig. 1 The [*Revert changes*] action in the synchronization log



As a result, all changes made in the account's record will be reverted and the record will be removed from the synchronization log. The local record will be updated with the latest data from the desktop application.

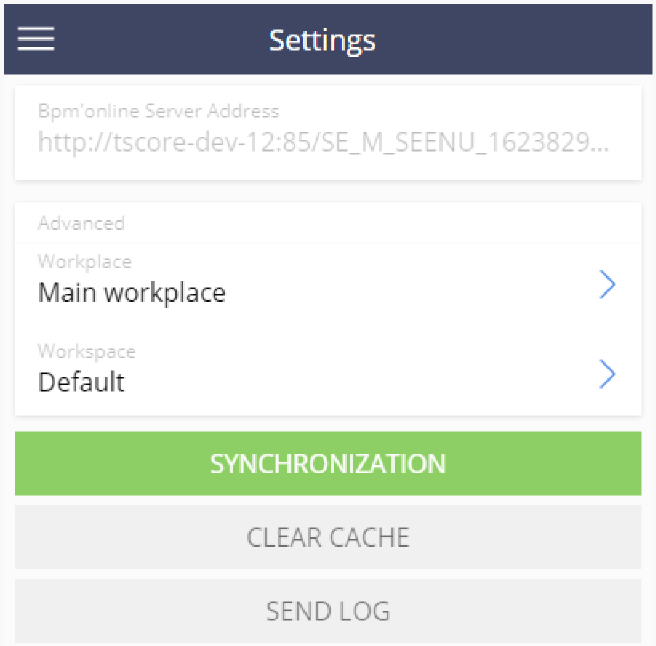
You can send a request for access permission to an administrator. More details about actions with records in the log are described in a separate article. Read more >>>

How to clear the mobile app cache?

You can clear the mobile app cache in one of the following options:

- Enter the [*Settings*] section of the mobile application and tap the [*Clear cache*] button (Fig. 2).

Fig. 2 Clearing mobile application cache



- Log out of the application and log in to another Creatio site, for example, to a trial version. In this case, the app cache will be cleaned automatically.
- Perform the cache cleanup of the mobile device.

Attention. After cleaning the mobile application cache, all data modifications that were made offline and not synchronized with the main application will be deleted.

How can I set up push notifications for mobile application users?

Mobile application users will now receive push notifications and reminders with valuable updates, such as meeting reminders or feed notifications. The configuration of push notifications is performed in the "BPMN process examples" guide.