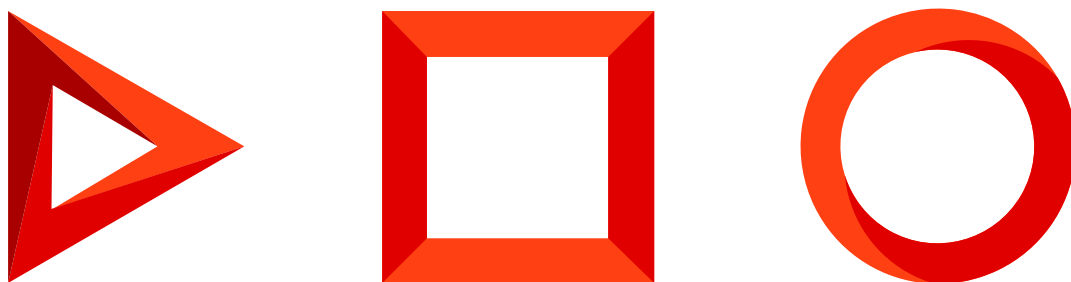


# Mobile app setup

Version 7.17



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# Set up mobile app workplaces

PRODUCTS: ALL CREATIO PRODUCTS

You can set up workplaces in the Mobile Wizard. The Mobile Wizard enables you:

- To view the list of available workplaces.
- To add new workplaces.
- To change the settings of the existing workplaces.

By default, the mobile application has a single “primary” workplace. As a rule, mobile app workplaces are configured by Creatio administrators.

Installing Creatio marketplace extensions (e.g., Field Sales) may add more workplaces.

## Add new workplaces


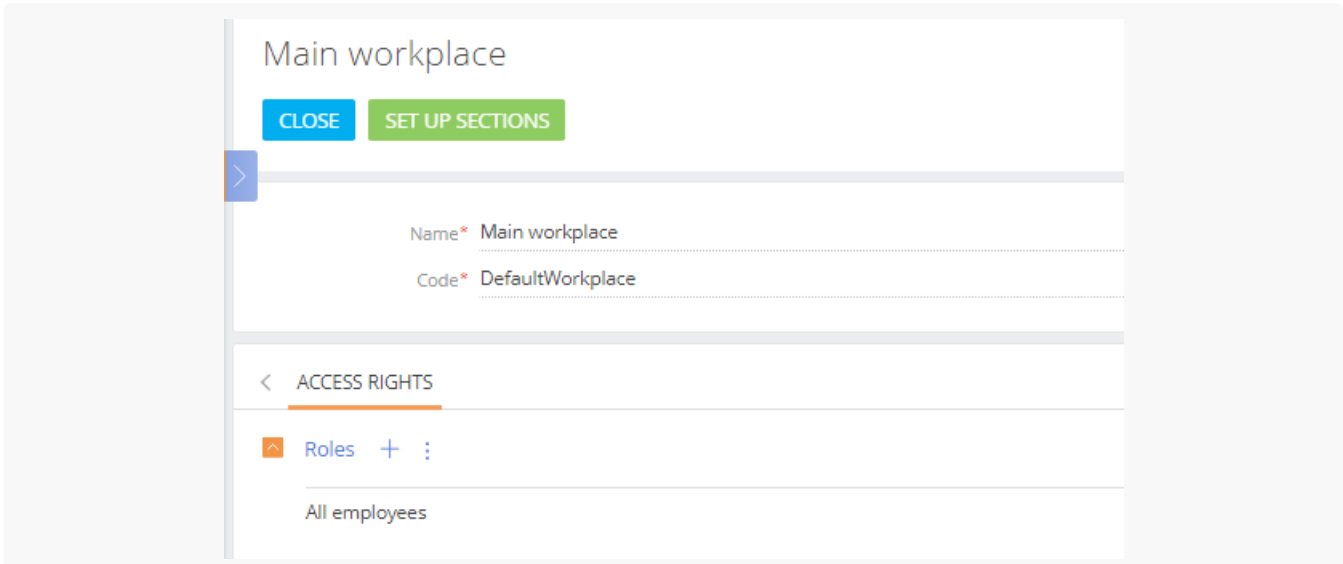
1. Open the System Designer by clicking .
2. Click [ *Mobile application wizard* ] in the “System setup” block.
3. Click [ *New workplace* ].
4. Populate the page for the new mobile application workplace (Fig. 1):
  - a. Enter the workplace **name**.
  - b. Specify a **unique code** that would identify the workplace. The unique code can contain numbers and Latin characters only.
  - c. Use the [ *Roles* ] detail to **specify user roles** that have access to the workplace in the mobile application.

Fig. 1 The workplace setup page



## 5. Save the page.

A new workplace will have default sections. You can add or remove sections by editing the workplace.

# Set up the workplace section list


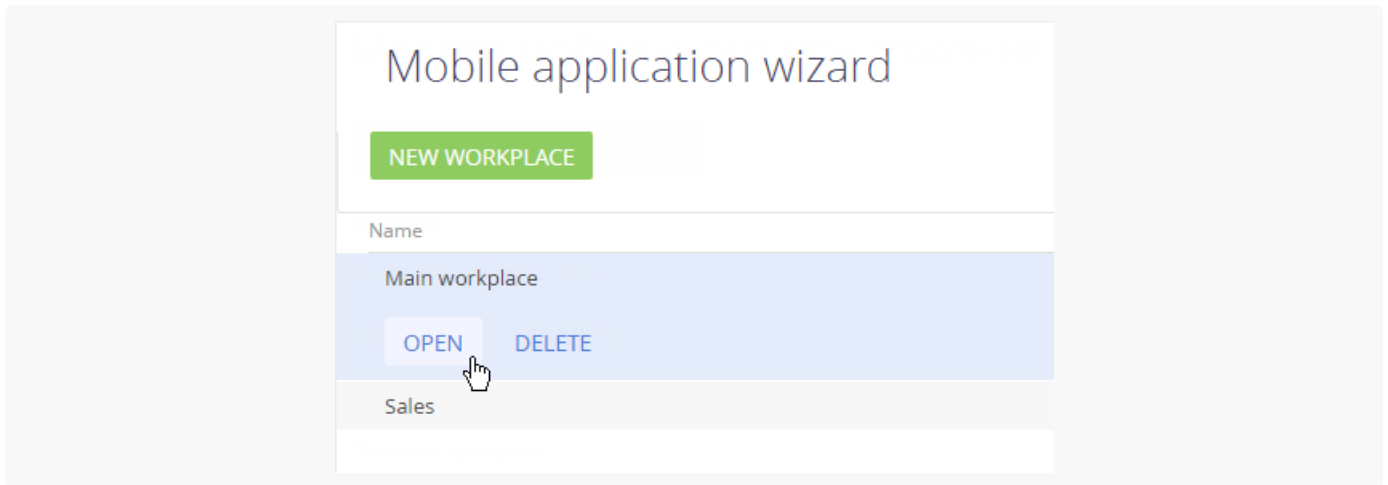
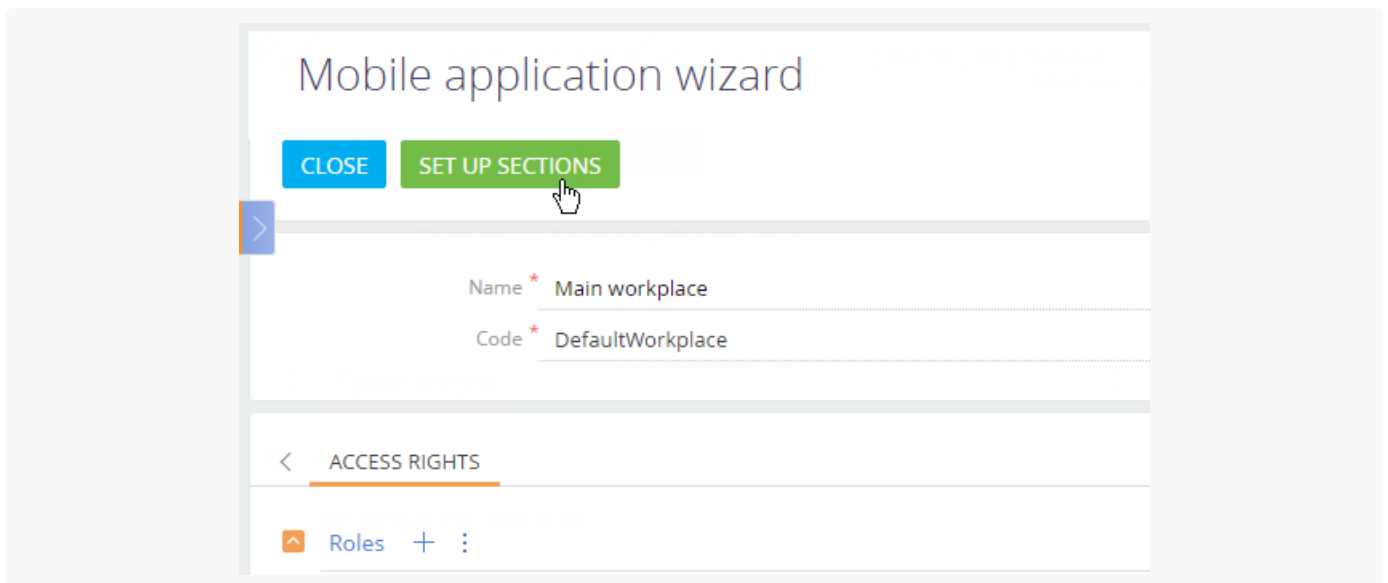
1. Open the System Designer by clicking .
2. Click [ *Mobile application wizard* ] in the “System setup” block.
3. Select the workplace to edit and click [ *Open* ] (Fig. 2).

Fig. 2 Opening the mobile application wizard



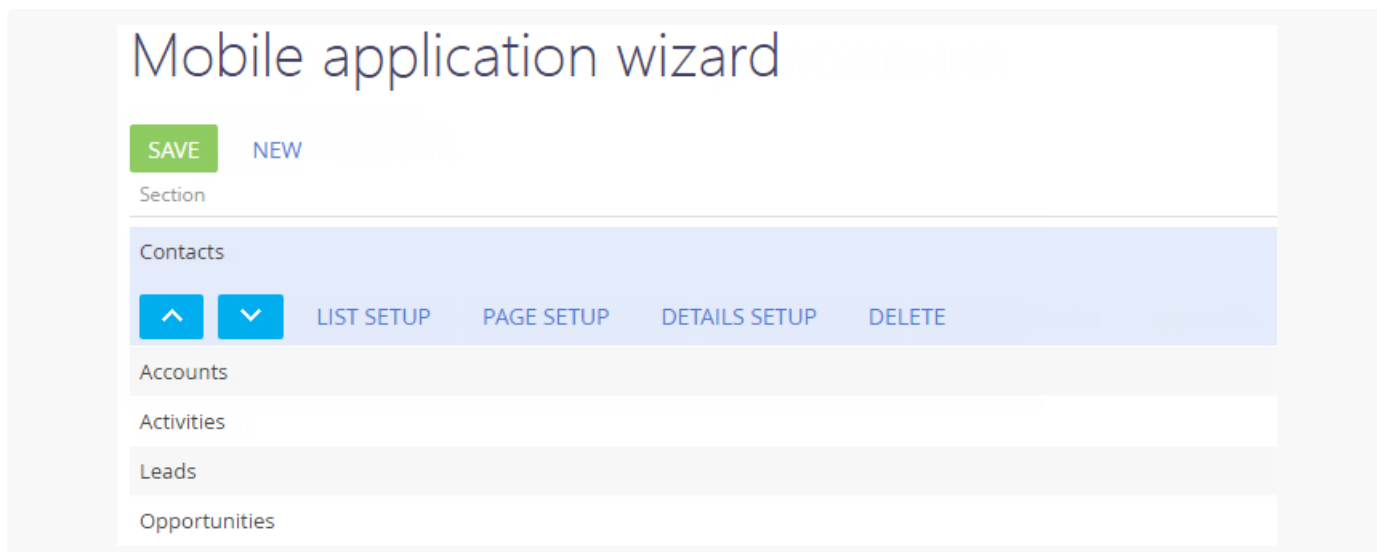
4. Click [ *Set up sections* ] on the workplace page (Fig. 3).

Fig. 3 Mobile application workplace page



As the result, the **Mobile Wizard** will open(Fig. 4).

Fig. 4 Mobile application wizard





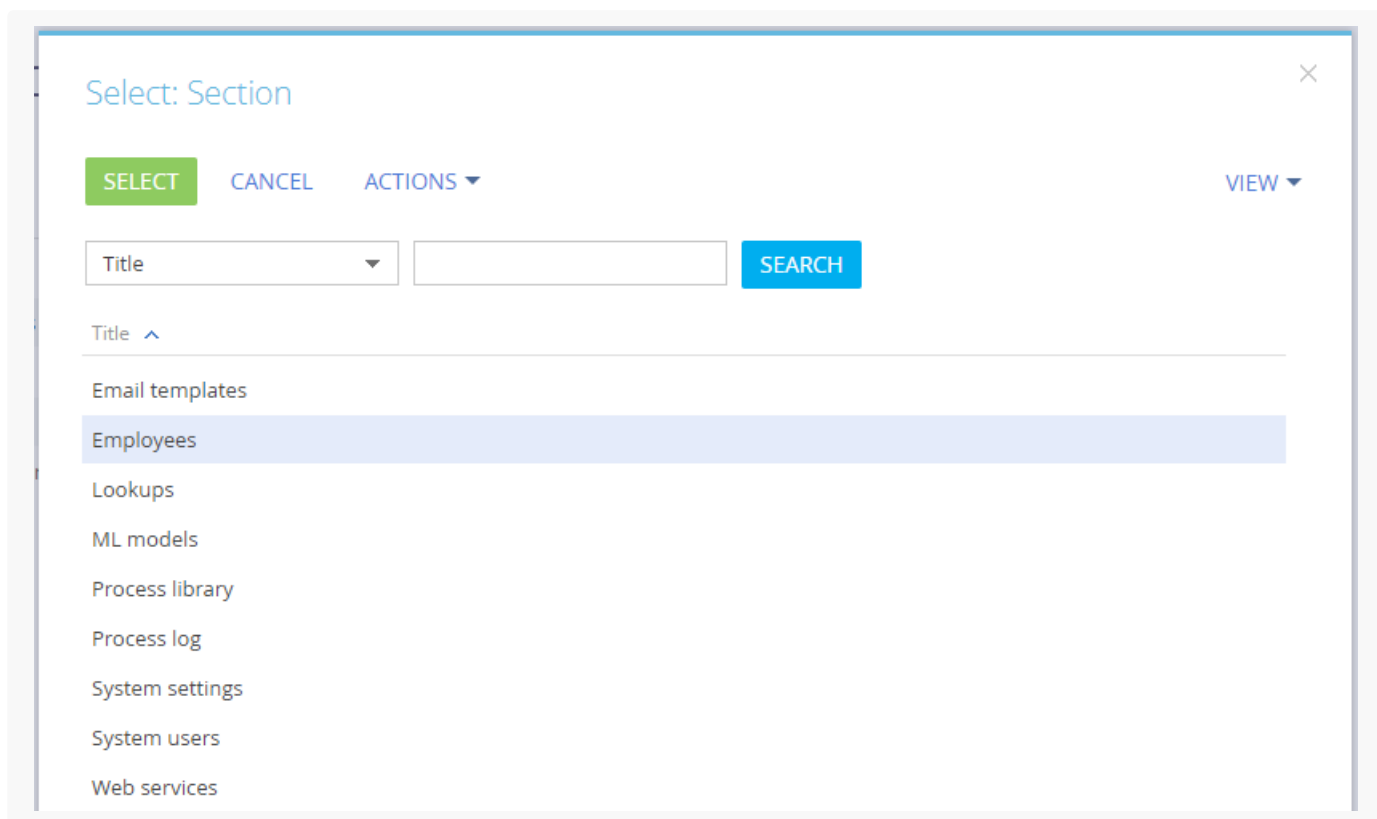
5. Click the necessary section and use the  and  buttons to change its order in the list.
6. Click the [ New ] button and select a section to add it to the workplace (Fig. 5).

Fig. 5 Selecting a section



7. Select a section in the list and click the [ Delete ] button to exclude it from the workplace.

**Note.** The mobile application structure contains only the sections that have been already created in Creatio. Use the [section wizard](#) of the desktop application to add custom sections to Creatio.

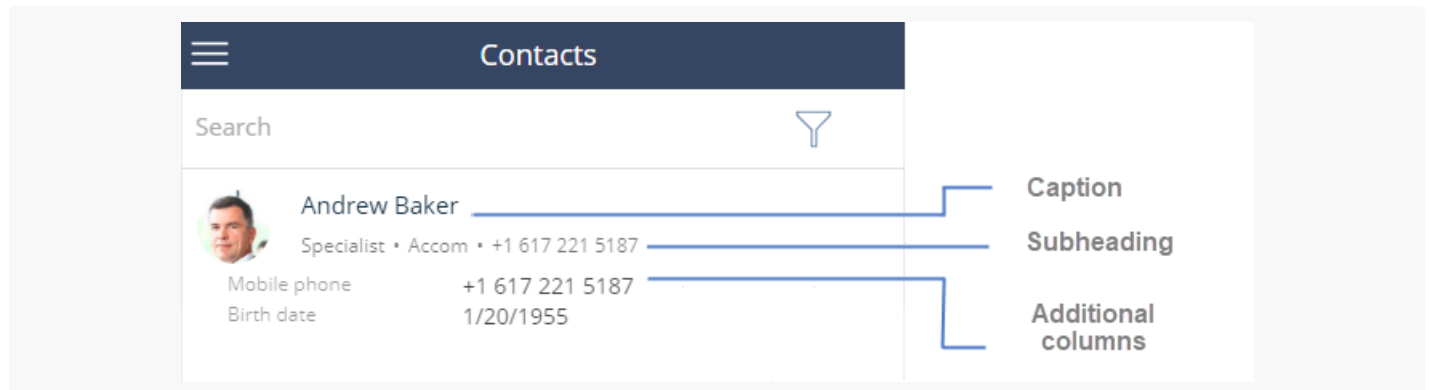
# Set up mobile application section list

PRODUCTS: **ALL CREATIO PRODUCTS**

Records in a mobile app list consist of three data blocks: “caption”, “subheading” and “additional columns” (Fig. 1).

The cation displays only one column by default. All the other blocks can display any data as per your settings. A maximum of 13 lookup columns can be displayed in a list. There are no restrictions for the columns of other types.

Fig. 1 The [ *Contacts* ] section list record in mobile application



## List setup procedure


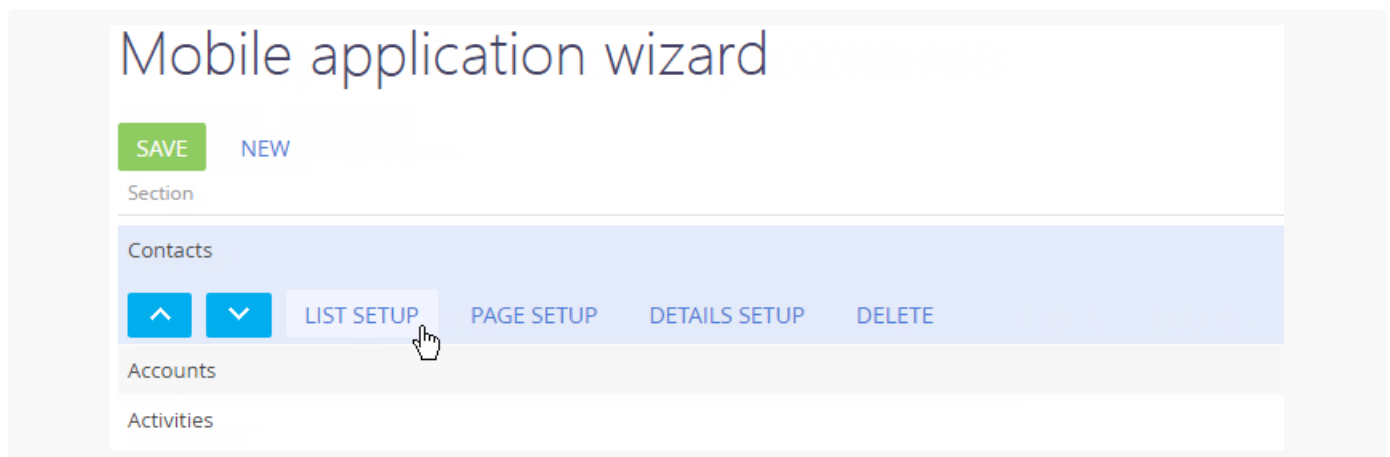
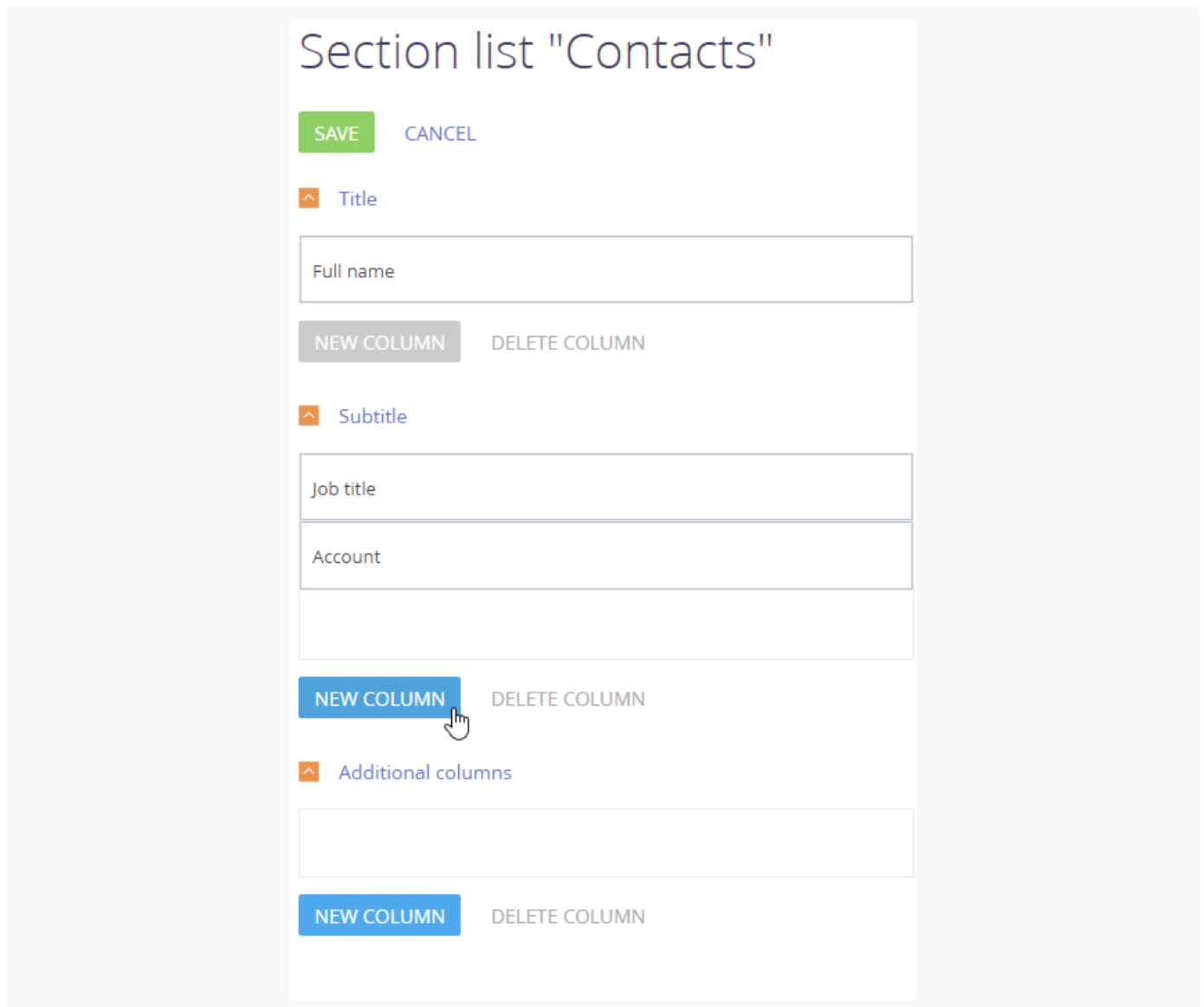
1. Open the System Designer by clicking .
2. Click [ **Mobile application wizard** ] in the “System setup” block.
3. Select the needed section and click **List setup** (Fig. 1).

Fig. 1 Setting up a section list



4. Set up the columns in the section list for the current workplace (Fig. 2).

Fig. 2 Adding columns to a section list

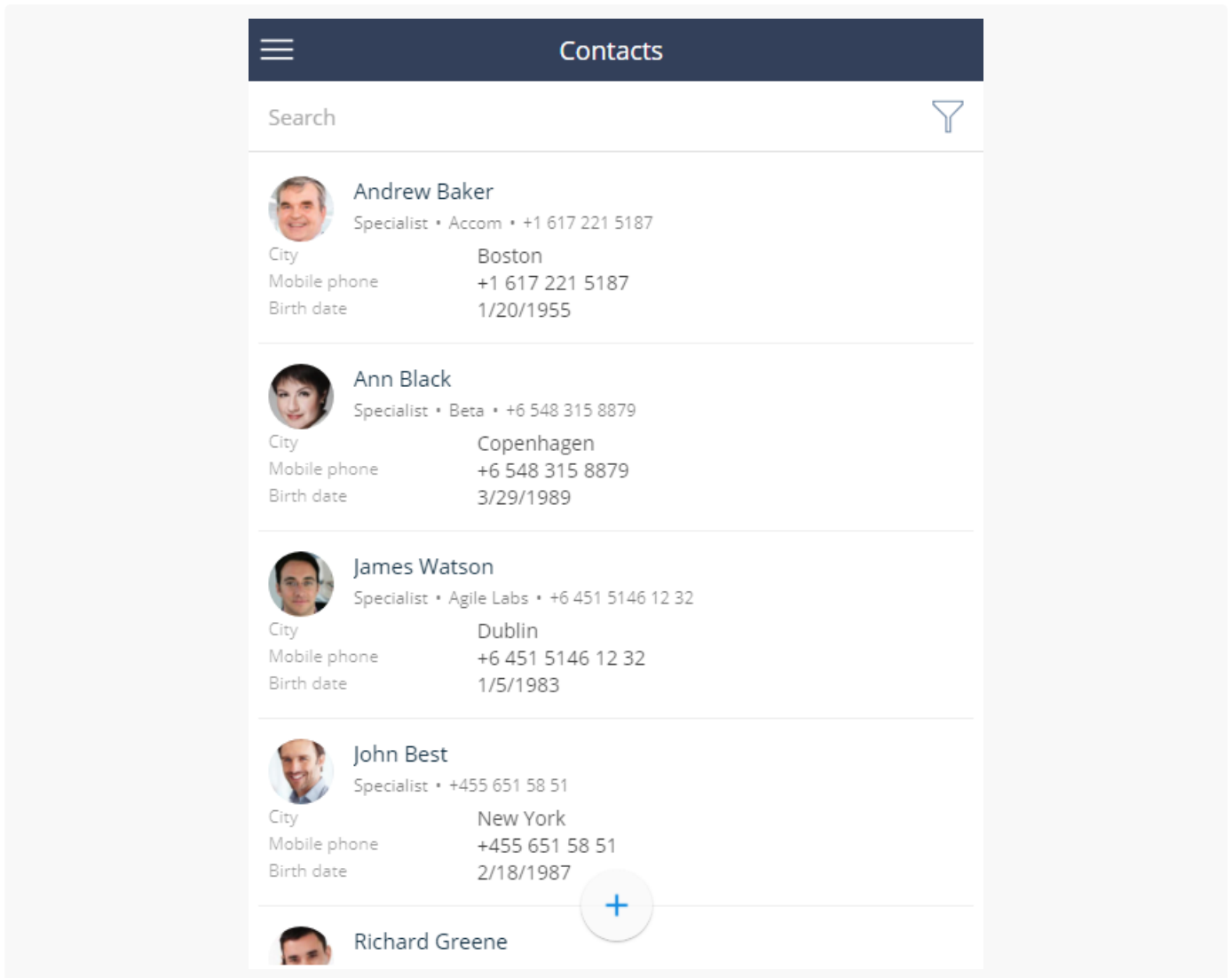


1. Click the **New column** button and select a column from the list.
2. You can drag and drop columns to change their positions.
3. Click the **Save** button.

As a result, new data will be displayed in the section list ([Fig. 3](#)).

Fig. 3 Custom list of contacts in the Creatio mobile app






# Set up mobile application section page

PRODUCTS: [ALL CREATIO PRODUCTS](#)

By default, a new section page in the mobile application contains a single group of fields: [ *General information* ]. This group of fields cannot be renamed or deleted.

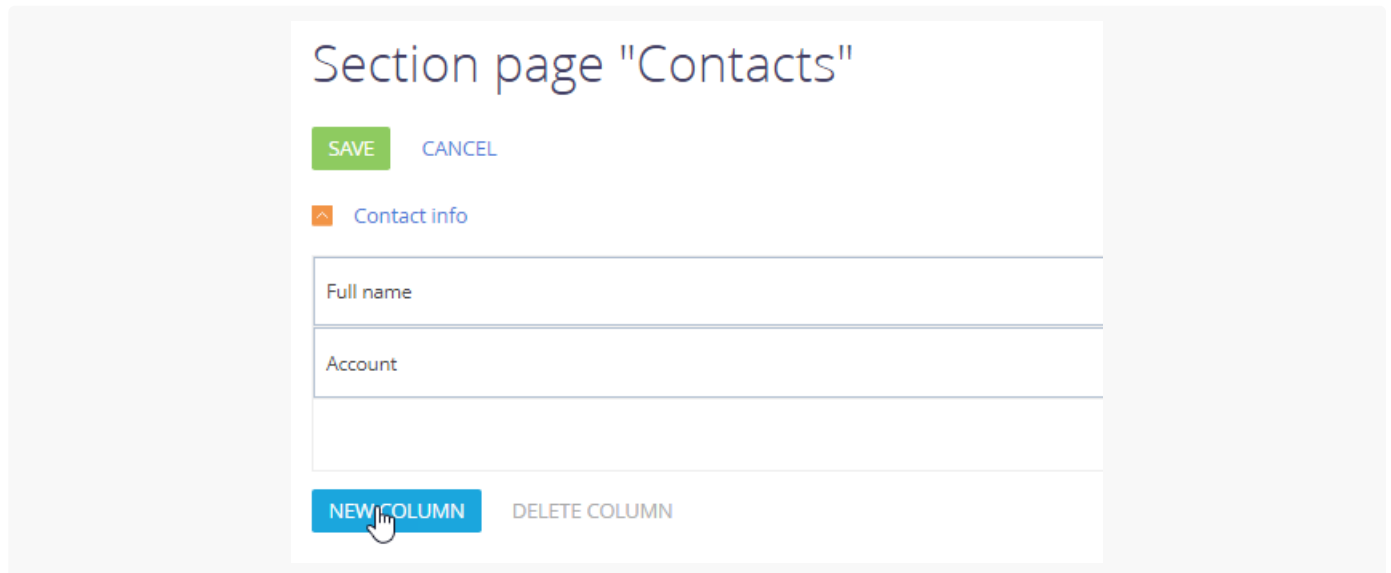
You can add the rest of columns, column groups and details on the section page manually.

## Add columns to page

1. Open the System Designer by clicking .
2. Click [ **Mobile application wizard** ] in the "System setup" block.
3. Select the workplace to edit and click **Open** .
4. Click the **Set up sections** button.
5. Select a section in the list and click **Page setup** ().

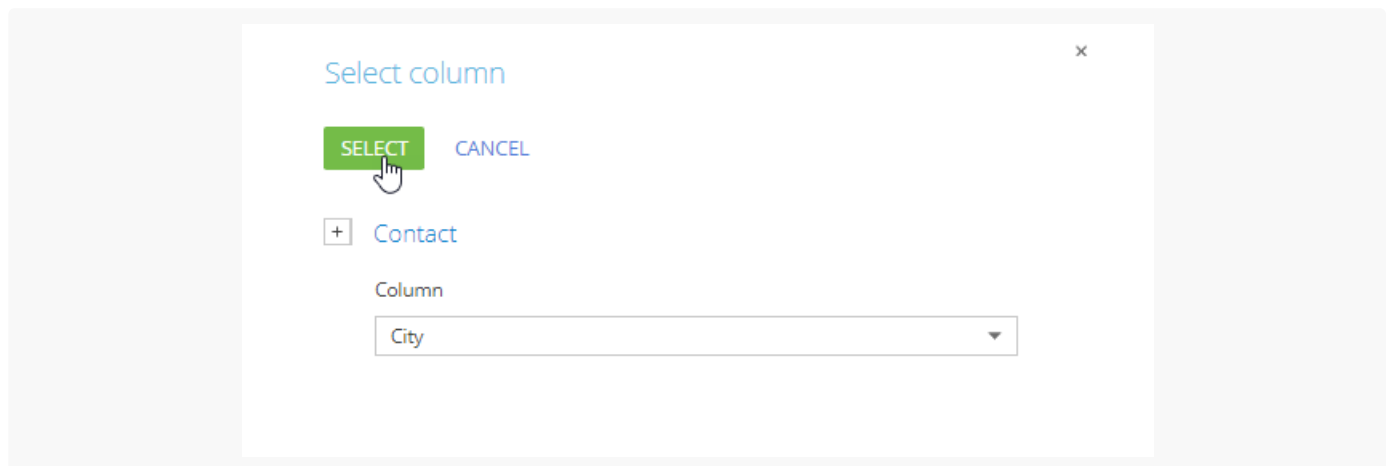
- Click the **New column** button in the column group where you need to add a field ([Fig. 1](#)).

Fig. 1 Adding fields to a page



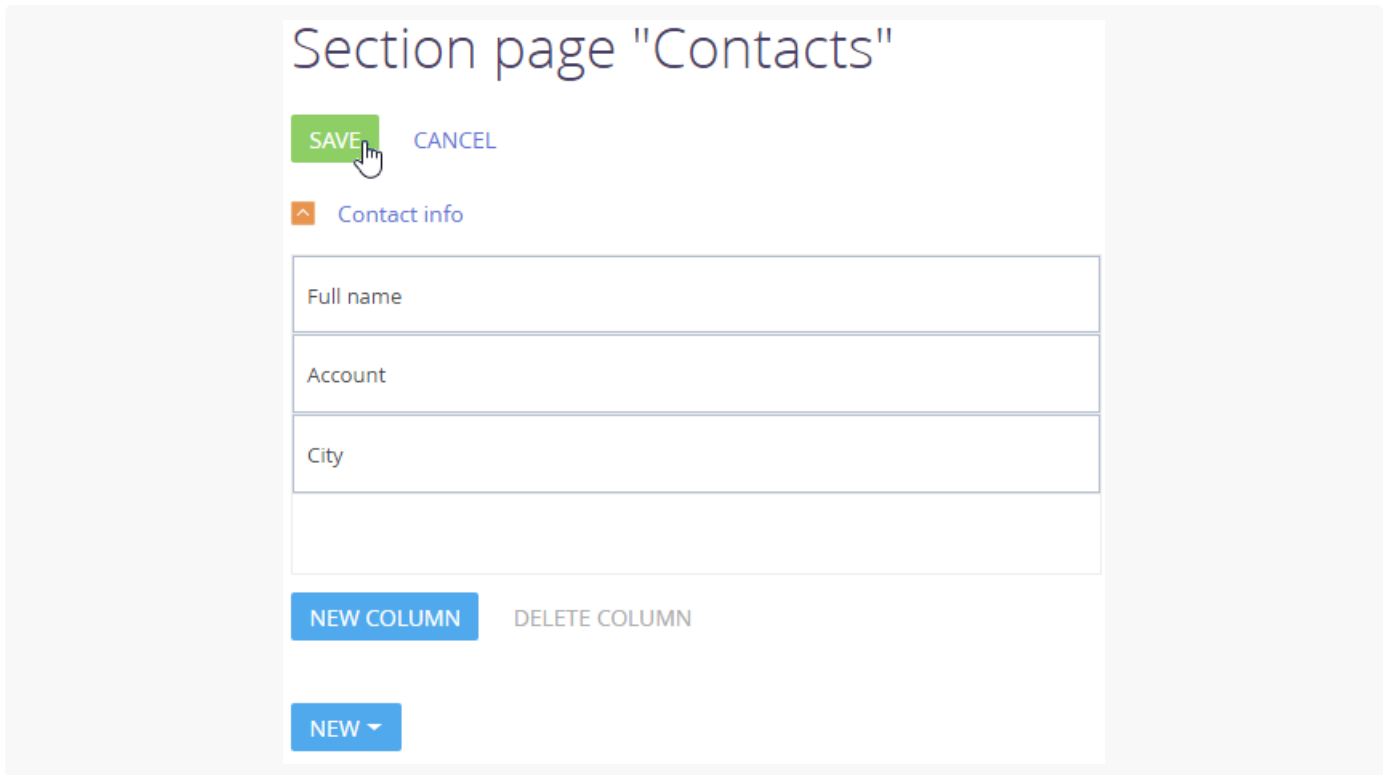
- Select a column in the [ *Select column* ] window and click **Select** ([Fig. 2](#)).

Fig. 2 Selecting a column for adding to page



- To change the order of the fields on the page, drag and drop them with the left mouse button.
- Click the **Save** button ([Fig. 3](#)).

Fig. 3 Saving a mobile app section page with the new column



10. Click **Save** on the mobile application wizard page.  
As a result, the changes will become available for all users.

## Add column group to page

You can add field groups to sections, including groups that are not available in the primary application. The [ *General information* ] group cannot be renamed or deleted, but you can add more fields to it.

To add a field group on the section page:

1. Open the mobile wizard and open the section page for editing (perform steps **1-5** listed in the "[Add columns to page](#)" block).
2. Select the **Column group** command in the **New** menu ([Fig. 1](#)).

Fig. 1 Adding a field group

3. Enter a title and a name for the field group.
  - a. In the **Caption** field, specify the name that will display in the mobile app.
  - b. The **Name** field is the internal name of the field group and can only contain Latin letters without special symbols.
4. Save the settings by clicking [ OK ]. ([Fig. 2](#)).

Fig. 2 Setting up a field group

5. A new empty field group will appear on the section page ([Fig. 3](#)). Add fields to it and save the changes on the page.

Fig. 3 Adding columns to a column group

# Set up mobile application detail

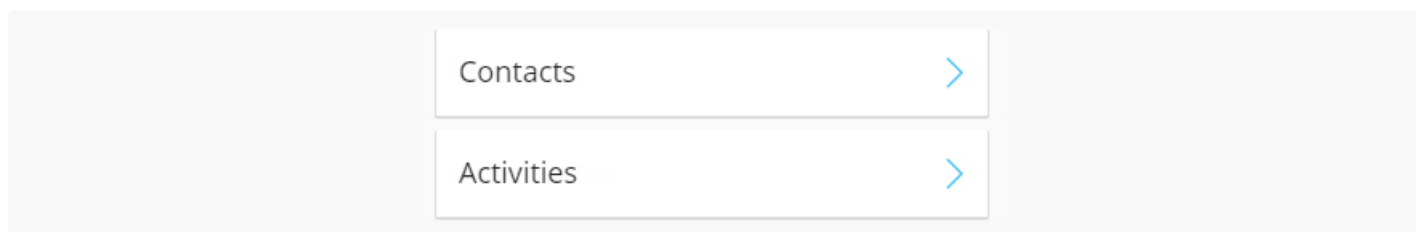
PRODUCTS: ALL CREATIO PRODUCTS

There are two types of details in the mobile application:

- **embedded details** display all their records on the section record page regardless of the amount of data on the detail ([Fig. 1](#));

Fig. 1 Embedded detail [ *Contact address* ] on the section page

- **standard details** do not display their records on the section page ([Fig. 2](#)). Tap a standard detail to view its records on a separate page.

Fig. 2 The [ *Contacts* ] and [ *Activities* ] standard details

You can add new details and configure the existing ones via the mobile application wizard.

## Add detail

To add an embedded detail:


1. Open the System Designer by clicking .
2. Click [ **Mobile application wizard** ] in the “System setup” block.
3. Select the workplace to edit and click **Open** .
4. Click the **Set up sections** button.
5. Select a section in the list and click **Page setup** ().
6. On the section page, select the **Embedded detail** in the **New** button menu ([Fig. 1](#)).

Fig. 1 Adding an embedded detail

## Section page "Contacts"

SAVE CANCEL

Full name

Account

City

NEW COLUMN DELETE COLUMN

Group: Place of work Set ^ v Delete

Department

Full job title

NEW COLUMN DELETE COLUMN

NEW ▾

Column group

Embedded detail

7. In the detail setting window:

- Select a detail to add.  
Some of the existing details are designed for specific sections. Be sure to select the version of a detail whose name specifically indicates that the detail was designed for this particular section. For example, when adding the [ *Attachments* ] detail to the [ *Contacts* ] section page, select the "Contact's attachments" detail.
- Specify the detail title.
- In the **Detail column** field, select the column that connects detail records to the current record in the section. For example, records on the [ *Attachments* ] detail in the [ *Contacts* ] section are connected to the [ *Contacts* ] section by the [ *Contact* ] column.
- In the **Object column...** field, specify the column - section identifier. By default, it is "Id".
- Save the detail setup parameters.

As a result, a new detail will be added to the section page. For some details, the default columns may not be configured. In this case, you must add the displayed columns manually. Adding columns to a detail is similar to [adding columns](#) to a section page.

8. Save the detail ([Fig. 2](#)).

Fig. 2 Setting up an embedded detail

## To add a standard detail:

To display data correctly on the standard detail, add the corresponding section in the mobile application. For example, to display data on the [ *Documents* ] detail of the contact's page, add the [ *Documents* ] section in the mobile application.

To add a standard detail:

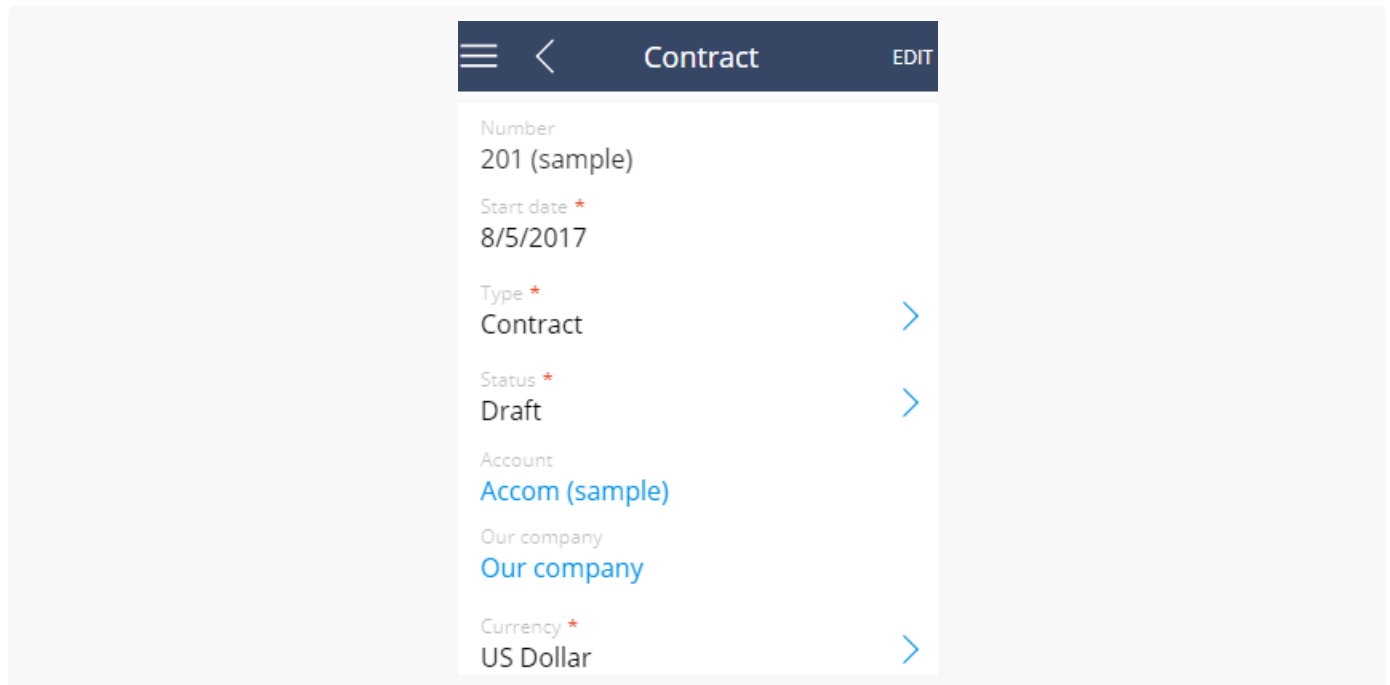
1. Open the mobile wizard and open the section page for editing (perform steps **1-4** listed in the "[To add an embedded detail.](#)" block).
2. On the page that opens, click **Set up details**.
3. On the section detail setup page ([Fig. 1](#)), click the **New detail** button.

Fig. 1 Section detail settings page



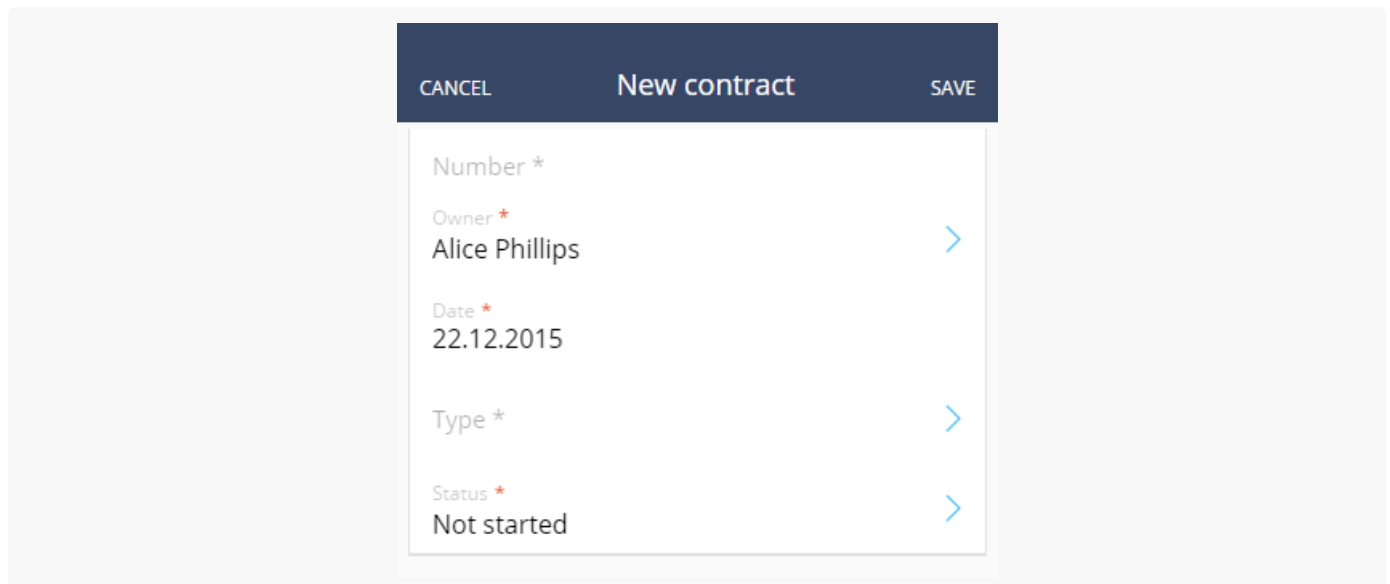
4. The page of a newly added standard detail will contain only required fields ([Fig. 2](#)).

Fig. 2 Required fields on a detail page



Thus, if you add the [ *Documents* ] standard detail to any of the sections in the mobile application, the detail page will contain only required fields ([Fig. 3](#)).

Fig. 3 Detail page with required fields



5. Add the corresponding section to mobile application and configure it for the correct operation and display of details.

For example, add the [ *Documents* ] section in the mobile application wizard to display additional fields on the [ *Documents* ] detail page And [set up fields on the edit page](#).

## Edit detail

### Edit an embedded detail

To edit embedded details, use the buttons next to the detail name ([Fig. 1](#)).

Fig. 1 Embedded detail editing buttons



Click the **Set** button to edit the detail. In the **Detail setting** window ([Fig. 2](#)), make your changes and click **Save**.

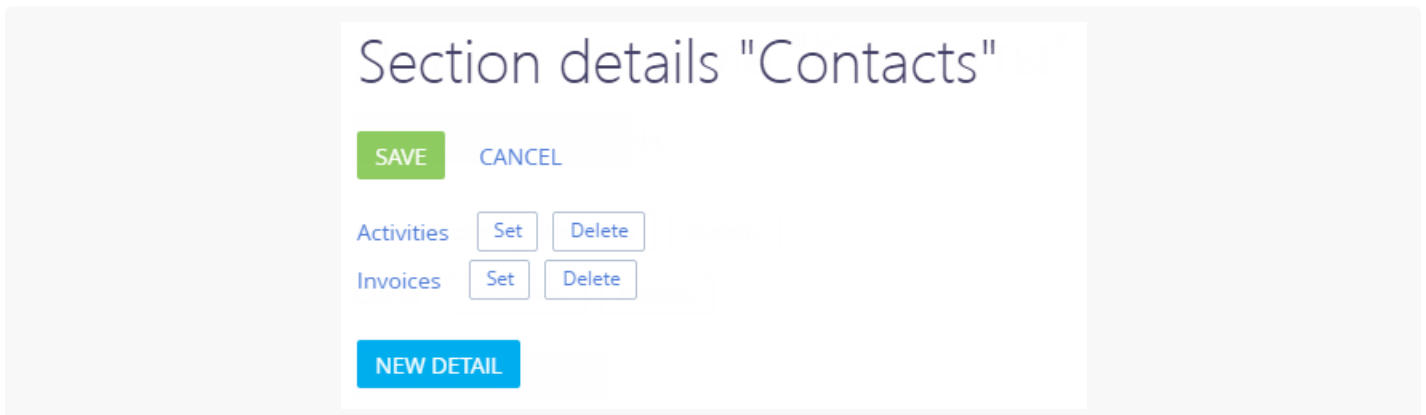
Use the  and  buttons to modify the location of the detail on the section page.

To delete the embedded detail from the section page, click the **Delete** button.

### Edit standard detail

To do this, move to the detail configuration page ([Fig. 1](#)).

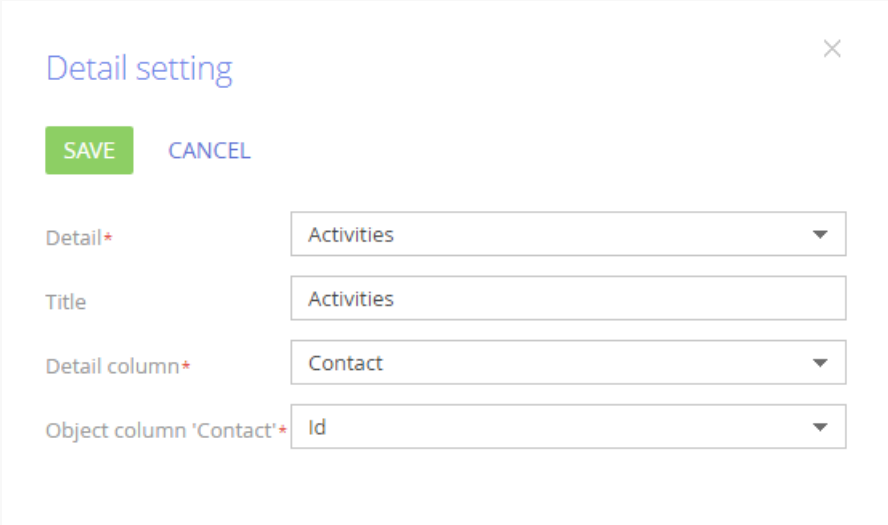
Fig. 1 Section detail settings page



To delete a standard detail from a section page, click the **Delete** button next to the detail name.

To modify the parameters of existing standard details, click the **Set** button next to the detail name. Setting up parameters of the standard detail is identical to setting up parameters described in the "" ([Fig. 2](#)) block.

Fig. 2 Setting up a detail



Detail setting

SAVE CANCEL

Detail\* Activities

Title Activities

Detail column\* Contact

Object column 'Contact'\* Id

You can specify a column of a connected object detail and configure data filtering by this object. For example, on the activity page, you can display the contacts connected to the account, which is specified in the activity. To do this, add the [ *Contacts* ] detail to the activity record page and specify “Account” in both the [ *Detail column* ] and [ *Object column* ] fields