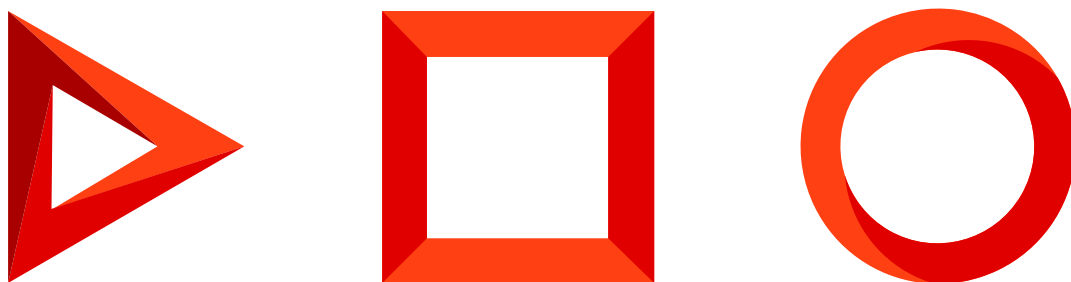


Appearance customization

Version 7.17



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Set up workplaces


PRODUCTS: [ALL CREATIO PRODUCTS](#)

The sets of sections displayed on the Creatio side panel for different user groups (roles) are called workplaces. You can set up any workplace by creating a list of sections that are necessary for the users in their everyday work. The sections that are not included in it will be hidden from the main application menu.

The list of available workplaces may vary depending on the user group. For example, a [*Communications*] workplace may include [*Activities*], [*Calls*] and [*Feed*] sections to be available for all system users, and a [*Supervisor*] workplace may include administration sections for users and roles that should be available for the system administrators group only.

Access to the workplaces does not affect the access to the system. The full set of Creatio sections, including the sections not included in any workplace, will still be available on the application home page.

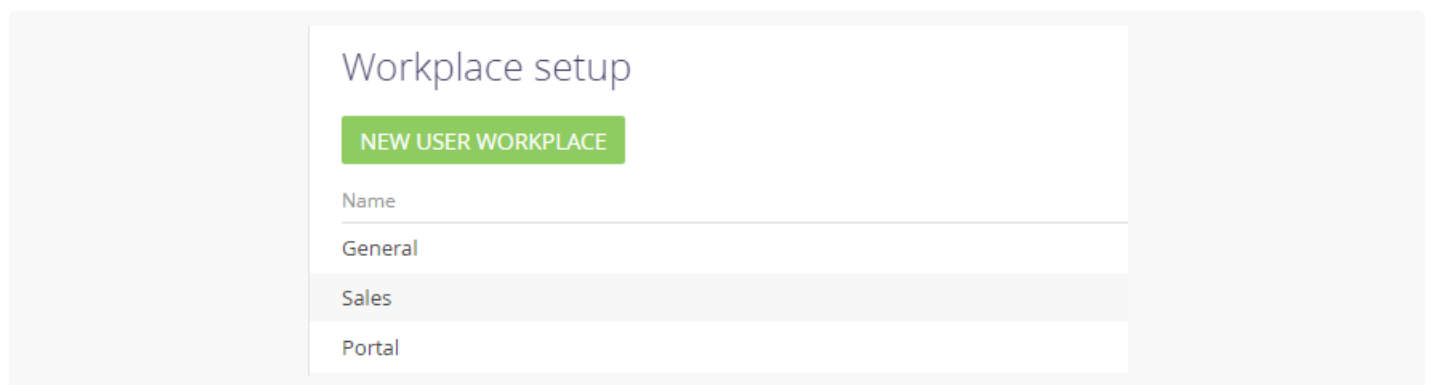
To access the **workplaces setup**

1. Open the System Designer, e.g., by clicking .
2. Click the [*Workplace setup*] link in the [*Set up view*] navigation block.

On the opened page (Fig. 1):

- view the list of available workplaces
- add or modify workplaces
- configure workplace settings
- Provide access permissions to the workplace for different functional and organizational user roles.

Fig. 1 The workplace list



Set up the workplace list



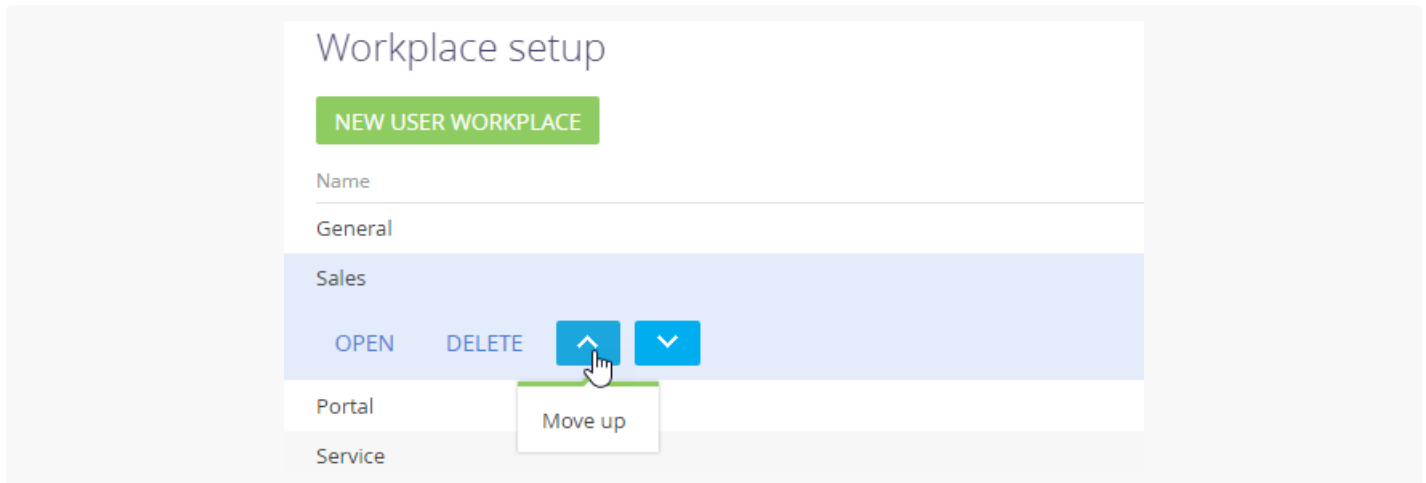
To set up a sequence of workplaces, select the required record and move it up or down by clicking the  or  buttons (Fig. 2).

Fig. 2 Changing the workplace position in the list



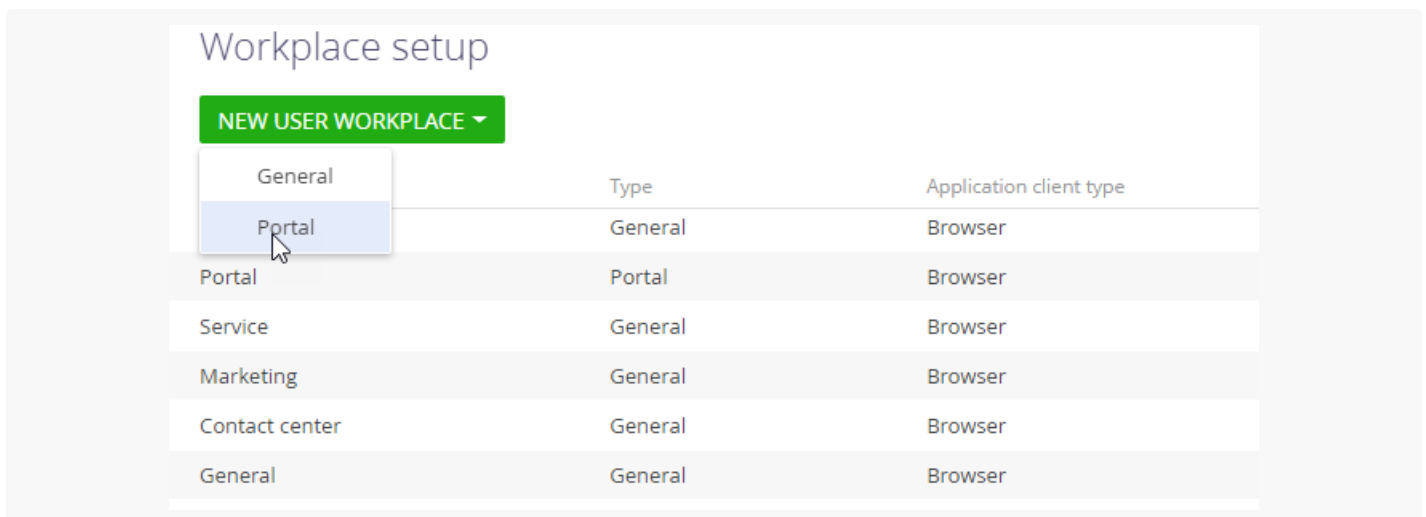
Set up workplace

Workplace setup page is used to add a new workplace or edit an existing one.

To **add a new workplace**, use the [*New user workplace*] button and select the workplace type (Fig. 3):

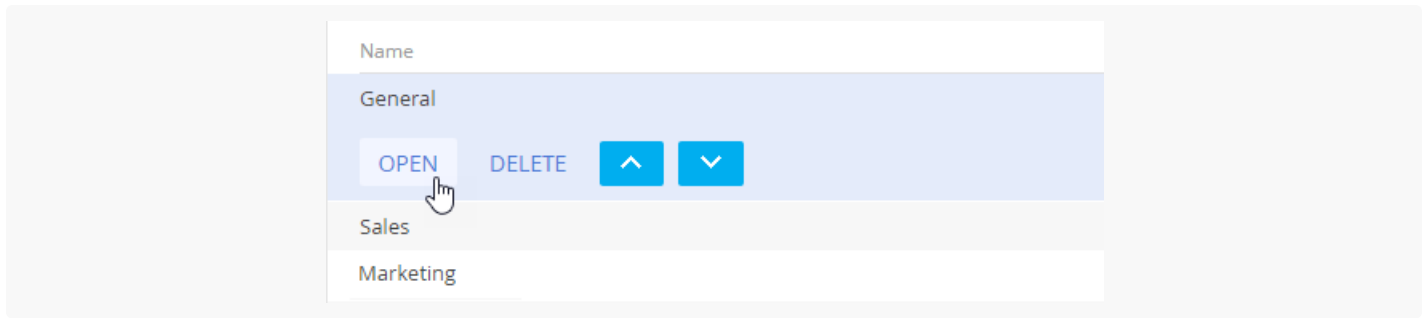
- **General**, if you want to set up the list of sections for the main application;
- **Portal**, if you want to set up the list of sections for the portal users.

Fig. 3 Adding a new workplace



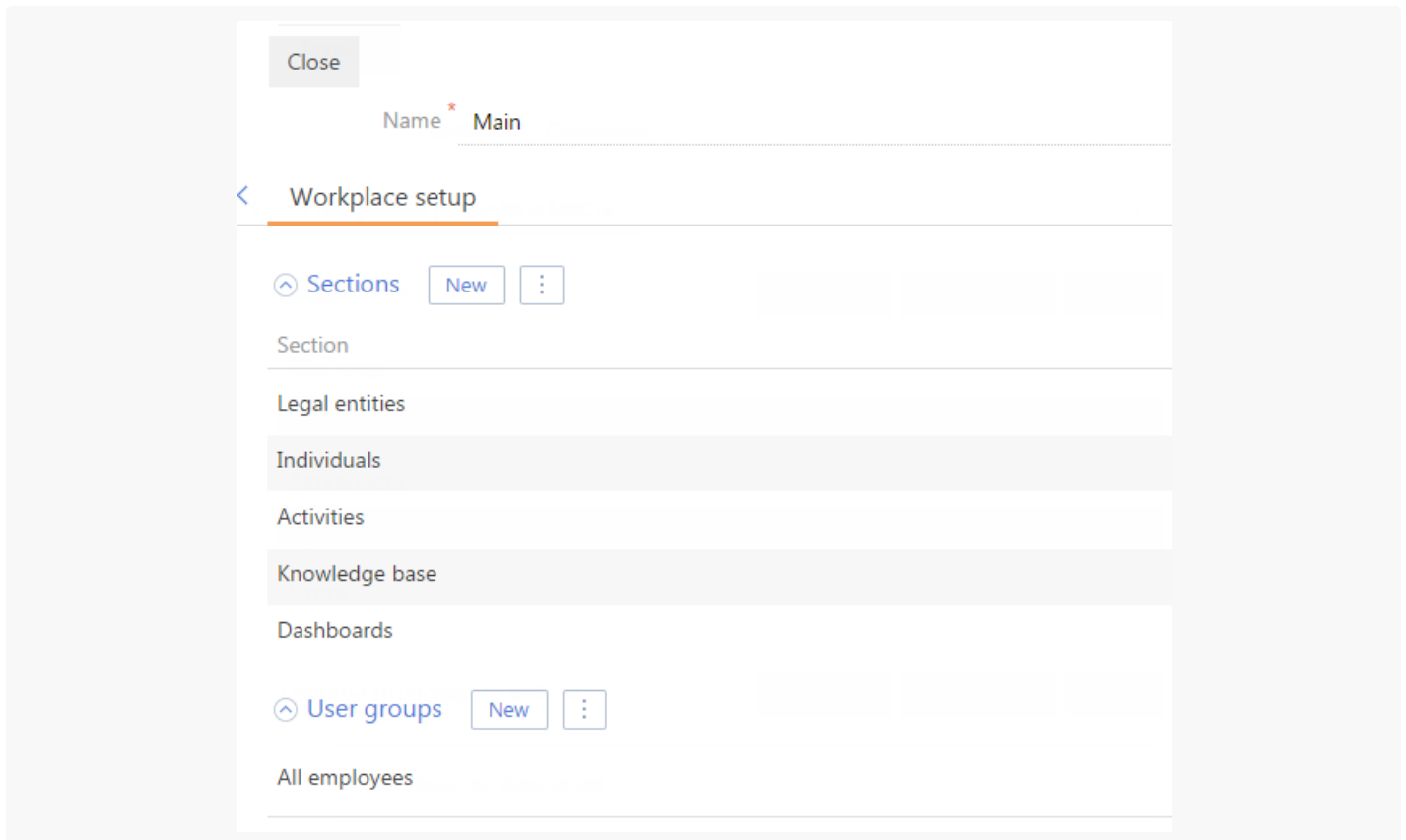
To **edit an existing workplace**, select it in the workplace list and click [*Open*] (Fig. 4).

Fig. 4 Editing a workplace



The workplace setup page (Fig. 5) will open.

Fig. 5 The workplace setup page

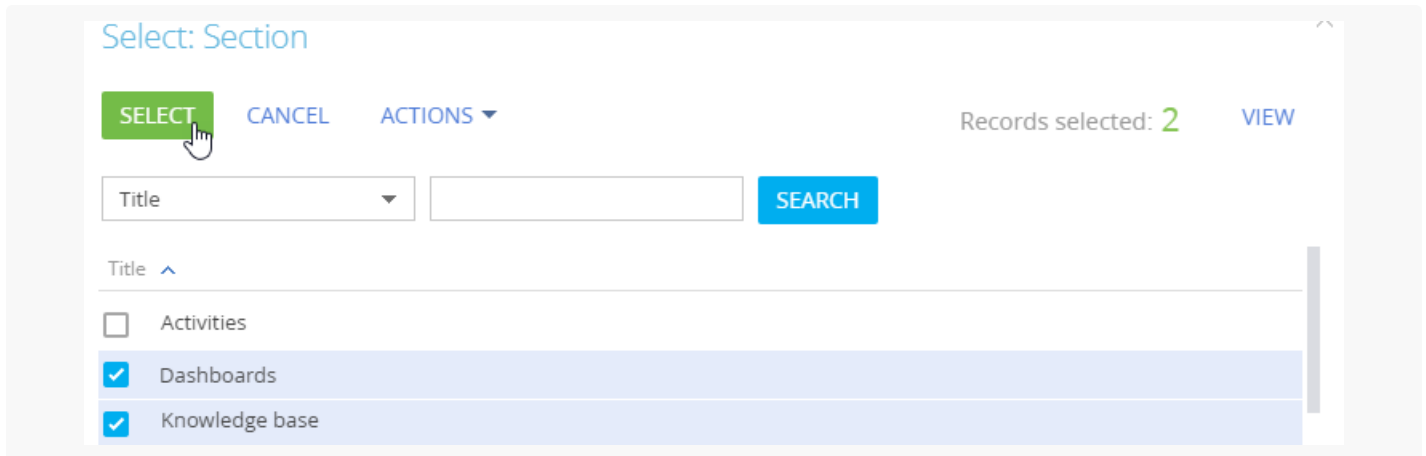


The [*Name*] field contains the name of the workplace, for example, “General”.

Set up sections in the workplace

You can set up a list of sections for the workplace using the toolbar on the [*Sections*] detail. Click the + button on the detail toolbar to open the window (Fig. 6) that is used to add sections to workplace.


Fig. 6 Adding sections to a workplace





You can only select from sections that belong to a specific workplace type.

Note. The list of sections displayed on the portal is configured in the [*Portal*] workplace in the main Creatio application. Learn more about adding custom sections on the portal in the [Set up portal sections](#) article.

Select the sections you need and click [*Select*].

To remove a section from a workplace, select the required record in the block and click [*Delete*] in the  button menu.

The sequence of the records in the [*Sections*] detail is the sequence in which the sections will be displayed in the side panel of the application. To move the required detail record up or down, select it and click the  or  buttons.

Note. Sections configuration is preformed in the [section wizard](#).

Set up user roles that need to access the workplace

Organizational and functional user roles that need to access the workplace are displayed on the [*User groups*] detail.

To set up access to the workplace:


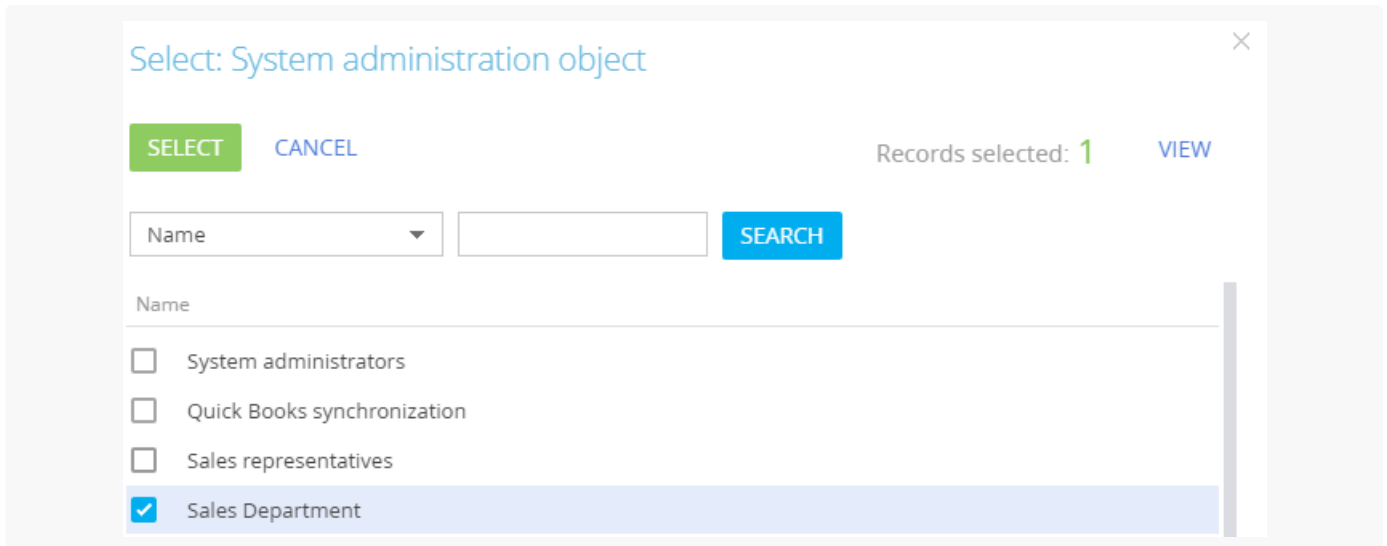
1. Go to the [*User groups*] detail toolbar and click the  button. A window with functional and organizational user roles will be opened (Fig. 7).

Fig. 7 To set up access for user groups to the workplace:



Note. You can configure a list of functional and organizational roles, as well as a list of users, in the “Users and administration” block of the System Designer. Learn more: [Users and permissions](#).

2. Select the roles you need and click the [*Select*] button. Selected roles will be added to the User groups] detail of the workplace.

As a result. All users of the selected roles will have access to the workplace.

Note. The changes will be applied after the user logs in the next time.

Add corporate logo

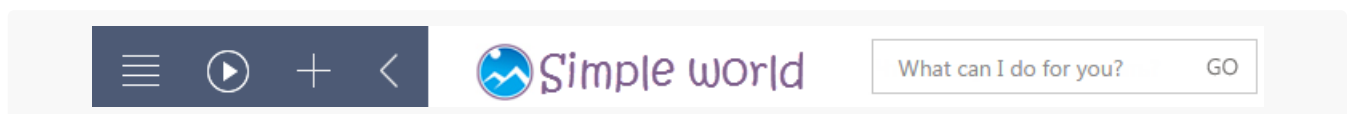
PRODUCTS: [ALL CREATIO PRODUCTS](#)

In Creatio, you can set up corporate logo that will display for all users.

You can customize the following elements:

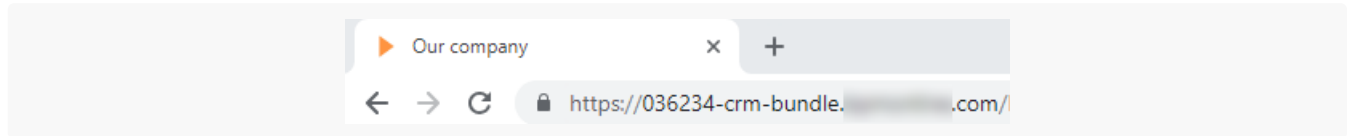
- **Logo** that will display:
 - on the loading screen and the Excel import page;
 - in the upper panel;
 - on the main page ([Fig. 1](#)).

Fig. 1 Custom logo on the main page



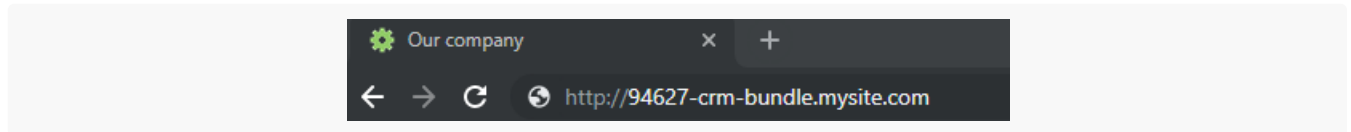
- **Browser tab:**
 - Application name ([Fig. 2](#)).

Fig. 2 The new application name in the browser tab




- Favicon – a thumbnail image in the browser tab ([Fig. 3](#)).

Fig. 3 The new favicon in the browser tab




Changing the logo

1. Open the system designer by clicking the  button.
2. Click **Logo customization** in the [*Set up view*] block.

Note. You can customize the logo only if you have permission to perform the "Logo customization changes" (CanManageLogo) system operation. Learn more about operation permissions in the "[System operation permissions](#)" article.


3. The page displays current logos:

Login page logo	This logo displays on the main page, the login page and the Excel import page. Recommended image size: 61x310 pixels. The image is stored in the "Logo" (LogoImage) system setting.
Main page logo	This logo displays on the main page and the System Designer page. Recommended image size: 37x274 pixels. The image is stored in the "Logo in main menu" (MenuLogoImage) system setting.
Upper panel logo	This logo displays in the top right corner of section pages. Recommended image size: 27x127 pixels. The image is stored in the "Upper panel logo" (HeaderLogoImage) system setting.

4. Click  to **upload** images. **PNG** is the recommended image format. You can use other standard image formats supported in modern browsers. If you use SVG files, you need to specify the width='...' height='...' parameters, otherwise some browsers may fail to render the image properly. If you upload a larger image, it will be scaled down to match the required dimensions.
5. **Save** the changes.


To enable new logo in the interface, log out of Creatio and log back in.

Changing the application name in the browser tab

1. Open the system designer by clicking the  button.
2. Click [**System settings**] in the [*System setup*] block.
3. Open the “**Product name**” system setting and
4. **Change the default value.** For example, specify “Our company” instead of “Creatio”. Specify any special characters in the name as an HTML code.
5. **Save** the changes. As a result, the name of the application in the browser tab will change.
To enable new logo in the interface, log out of Creatio and log back in.

Changing the favicon

You can change the default favicon in the browser tab. To do this:

1. Open the system designer by clicking the  button.
2. Click “**System settings**” in the [*System setup*] block.
3. Open the “**FaviconImage**” system setting. Click [*Clear value*]. Click [*Select file*] and choose the image. Save the changes.
4. Open the “**UseFaviconFromSysSettings**” system setting. Select the [*Default value*] checkbox to use the favicon uploaded in the previous step.

As a result, the new favicon will display in the browser tab.

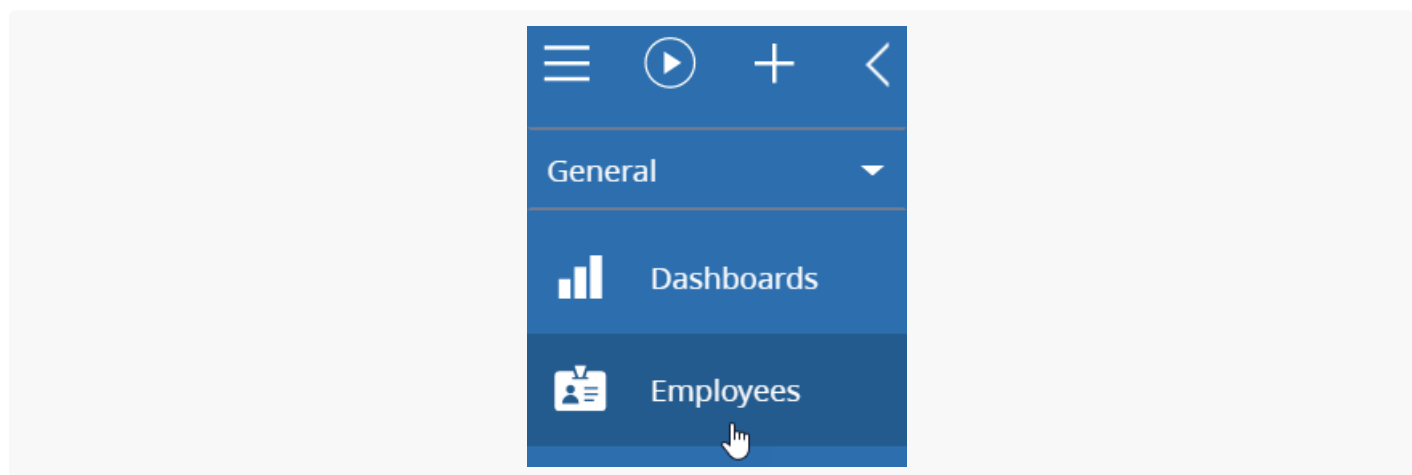
To enable new logo in the interface, log out of Creatio and log back in.

Customize colors


PRODUCTS: ALL CREATIO PRODUCTS

On the color customization page, you can change the color of the side panel in Creatio for all users ([Fig. 1](#)).

Fig. 1 Example of side panel color scheme



The setup procedure is as follows:

1. Open the system designer by clicking the  button.
2. Click **Logo customization** in the [*Set up view*] block.

Note. You can customize the color only if you have the right to perform the "Access to color customization" system operation (CanManageSectionPanelColorSettings).

3. Specify the needed settings in each field:

Section panel background	Main background color of the section panel. The value is saved in the "Section panel background" system setting (SectionPanelBackgroundColor).
Text in section panel	Main color of all section headings in the section panel. The value is saved in the "Text in section panel" system setting (SectionPanelFontColor).
Selected section background	Color of the selected section area in the section panel. The value is saved in the "Selected section background" system setting (SectionPanelSelectedBackgroundColor).
Text in selected section	Heading color of the selected section in the section panel. The value is saved in the "Text in selected section" system setting (SectionPanelSelectedFontColor).

4. Click **Save**.

You can restore the initial color settings at any time by clicking [*Restore default settings*].