Creatio Academy

Accounts and contacts

Version 7.17

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Create a contact

PRODUCTS: ALL CREATIO PRODUCTS

Creatio contacts are the contact persons of the customers and partners, individual clients, and other business contacts.

Use the [*Contacts*] section to work with contacts. Use this section to group the contacts by various parameters, analyze the history of interactions with customers, and view the resulting statistics.

Contact personal data are stored in the contact's profile, on the [*Communication channels*] and [*Addresses*] details at the [*Contact info*] tab, and on the [*Job experience*] detail at the [*current employment*] tab. In the database, they correspond to the following tables: “Contact,” “ContactCommunication,” “ContactAddress,” and “ContactCareer.”

In Creatio, a contact can be:

- added manually
- imported from Excel
- imported from the landing page
- saved manually or automatically during lead qualification (available in Sales Creatio and Marketing Creatio)
- received through synchronization with social networks
- received through Google synchronization
- created with incoming mail processing
- created with Single Sign-On authentication.

Attention. To synchronize with external resources, you need to perform the initial setup. Social network integration, Google synchronization, and Single Sign-On technology are described in the “Base integrations” section.

Create a contact manually

1. Open the [*Contacts*] section
2. Click the [*New Contact*] button.
3. In the opened window, fill out the contact profile:

Full name	First and last names of the contact. The field is required.
Type	Type of contact, for example, “Customer” or “Contact person.”
Account	The company whose employee the contact is.
Full job title	Contact's current position.
Department	The department of the company where the contact works.
Mobile phone	Contact's mobile phone number. The value is synchronized with the [*Communication options*] detail of the [*General information*] tab.
Email	The email address of the contact. The value is synchronized with the [*Communication options*] detail of the [*General information*] tab.

4. Click [*Save*].
5. On the page that opens, add a photo of the contact to display on the contact page, the section list, and the feed. To add a photo, click and upload the photo using the standard file selection window. We recommend uploading a square image (aspect ratio: 1:1). Click on the button to remove the photo. If you mouse over the photo area, the buttons will become visible.
6. On the [*General information*] tab, populate the contact data:

Type	Type: customer, supplier, contact person, or employee. If you populate this field on the previous step, the data will automatically display on the [*General information*] tab.
Owner	Name of the responsible employee.
Title	Honorific for the contact, for example, “Mr” or “Mrs.”
Gender	Gender of the contact.
Salutation	The preferred way to address the contact.
Preferred language	The language to use by default for automated communications with the contact. Affects the language of email notifications. If no preferred language is set for a contact, the notifications will be sent in English (the default language). The drop-down list of this field contains only languages whose status is set to “Active” in the [*Customer languages*] lookup.
Age	Contact age. The field is populated automatically and is grayed out if automatic calculation of contact age is enabled. Creatio calculates a contact’s age based on the value in the [*Birthdate*] field. If the [*Birthdate*] field is empty, the value in the [*Age*] field will be “0.” If you disable the automatic calculation of contact age, the [*Age*] field will become editable. More information about age calculation is available in the “Contact age calculation” article.

7. Specify the addresses and communication options of the contact. Learn more in the “Manage contact communication options” article.
8. Add dates important for the contact on the [*Noteworthy events*] detail. The detail fields are displayed when you select the corresponding commands in the + menu.

Type	Type of the noteworthy event, such as “Birthday” or “Company day.” Defined when a record is added. You can change it afterward.
Date	Date of the noteworthy event.

Note. Noteworthy events of the “Birthday” type are linked to the [*Birthdate*] field of the contact. If you populate the [*Birthdate*] field, a "Birthday" noteworthy event will be automatically created for the contact. Likewise, if you add a noteworthy event of the “Birthday” type, the [*Birthdate*] field will be populated accordingly. The same applies whenever the existing data is modified.

9. Specify the connections between the selected contact and other contacts and accounts using the [*Connected to*] detail. Learn more in the “Create connections between companies and accounts” article.
10. Navigate to the [*Current employment*] tab and populate contact career data. Learn more in the “Manage contact career” article.
11. Go to the [*Communication channels*] tabs to restrict the usage of the communication options. Specify the

communication options no to use for communicating with the contact. The [*Do not use email*], [*Do not use phone*], [*Do not use SMS*], [*Do not use mail*] checkboxes signify which communication options should not be used to contact the person. These fields are non-editable. The values are filled in on the [*Communication options*] detail of the [*General information*] tab.

12. Click [*Save*].

    As a result, a new contact record will be added to Creatio. Update the contact information at any moment, for example, via data enrichment.

When you save a record, additional actions are available:

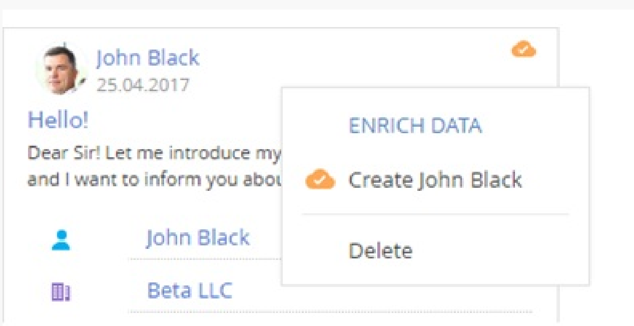
- The contact age is calculated based on the specified birth date. The contact's age is calculated based on the value in the [*Birthdate*] field.
- Duplicates search when saving a record. When you save a contact, a duplicates search page might open. It means that this record might be already registered in the system. You can edit the new record or indicate that the records found are not duplicates of the newly saved record.

Add a new contact from an email

If an email is received from a contact that has not been registered in the system, the sender's data will be displayed as "unrecognized" in the emails. In this case, you can create a new contact record directly from the incoming email. To do this:

1. Open the email tab in the communication panel.
2. Select the author of the email for which you want to create a contact.
3. Click .
4. Select the [*Create "contact name"*] from the data enrichment menu (Fig. 1).

Fig. 1 – Creating a new contact from the email conversation



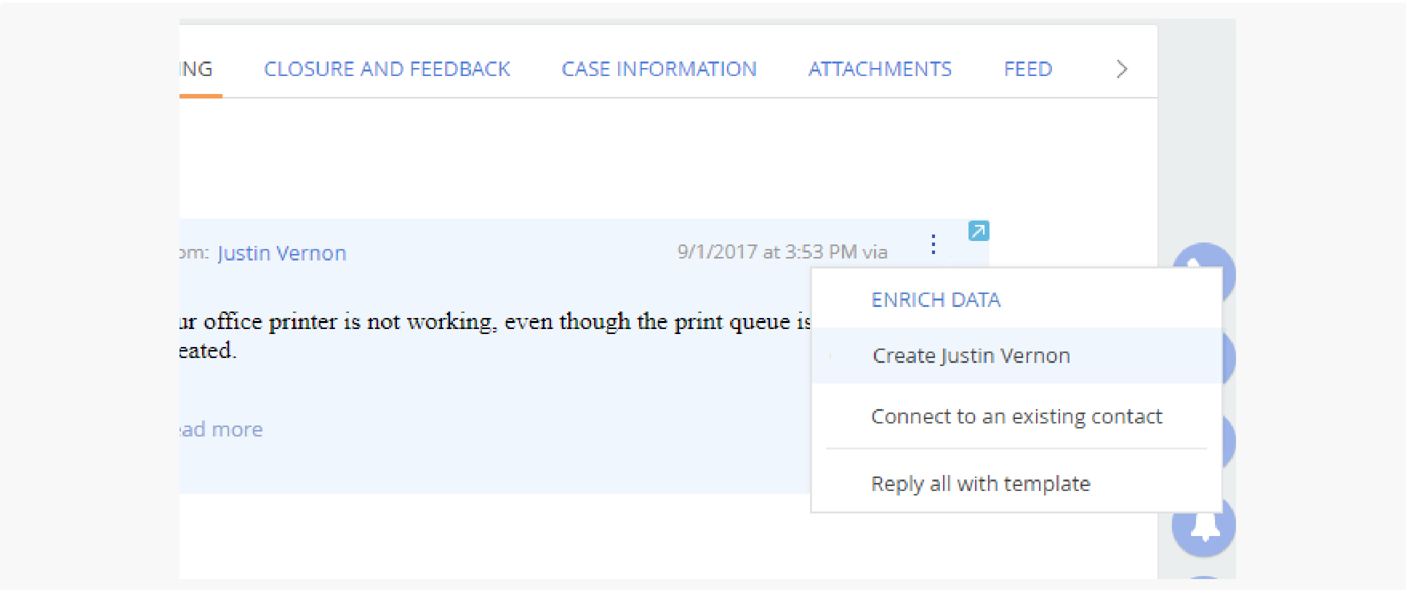
5. Select the contact data that you want to add in the opened window.
6. Save the changes.

   As a result, a new contact will be added to the system. The [*History*] tab of the new contact page features all emails where the contact is either the sender or recipient over the last seven days. The email will be automatically linked to the new contact.

Create a contact from a case

Service Creatio products enable you to create a new contact from a case page if the case was created based on an email from unknown contact. Adding a new contact that way is similar to adding a contact from an email on the communication panel (Fig. 2). Creating a new contact only requires the name and the email address of the case contact, specified in the “From” field in the email (e.g., John Best, <john.best@gmail.com>).

Fig. 2 – Creating a contact from an email on the case page



The email used to create a contact will be displayed on the [*Email*] detail on the contact’s page. Creatio will prompt you to select the contact as the main contact in the case.

Create an account

PRODUCTS: ALL CREATIO PRODUCTS

All information about customer companies, partners, contractors or suppliers, or competitors in Creatio is stored in one place, up-to-date, and easily accessible at any time.

Use the [*Accounts*] section of Creatio to keep a record of contact data, track connections between companies, group companies by various criteria, and analyze the relevant statistics. For example, the data on the number of employees can be used to estimate the size of the company.

> **Note.** The term “account” corresponds to “legal entity” in Financial Services Creatio products. Legal entities include customer companies, partners, competitor banks, subsidiaries, and branches of your bank, as well as insurance companies that you interact with. The [*Accounts*] section corresponds to the [*Legal entities*] section in Financial Services Creatio products.

In Creatio, an account can be:

- added manually
- imported from Excel
- saved manually or automatically during lead qualification (available in Sales Creatio and Marketing Creatio)

To add a new account record:

1. Open the [*Accounts*] section.
2. Click [*New account*].
3. In the opened window, fill out the account profile:

Name	The official name of the company. The field is required.
Primary phone	The primary phone number for contacting this company.
Primary contact	Name of the main contact person for the account, for example, the manager that you work with.
Web	Company web-site.

4. Click [*Save*].
   As a result, the contact record will appear in the section list. To add more account data, select the record in the section list, and click [*Open*].
5. On the page that opens, add a logo of the account to display on the account page, the section list, and the feed. To add a logo, click and upload the photo using the standard file selection window. We recommend uploading a square image (aspect ratio: 1:1). Click to remove the photo. If you mouse over the photo area, the buttons will become visible.
6. Provide the account data on the record page:

Type	Type of the account depending on its relations with your company, such as “Customer”, “Partner” or “Supplier.” The account types can be used for filtering in other fields, so we do not recommend deleting the values from the [*Account types*] lookup.
Owner	The Creatio user, responsible for working with the account.
Category	The category of account defines how important the account is for your company. For example, “A“ – top importance, “D“ – low importance.
Industry	The field that the account operates in, for example, “IT company,” “Business services,” or “Manufacturing and distribution.”
Price list	A personal price list is used for orders where the current account is the customer. By default, the [*Price list*] field is hidden on the account page. You can add the field to a record profile or any of the record tabs (e.g., the [*General information*] tab), using the Section Wizard. Learn more about adding fields to record pages in the “Set up page fields” article. You can find the values for the [*Price list*] field in the [*Price lists*] lookup. The prices for each price list are specified in the [*Prices*] detail of the [*Prices and availability*] tab on the product page. Learn more about using price lists in the “Manage prices” article. The field is available in Sales Creatio, commerce edition, and Sales Creatio, enterprise edition.

7. Populate the following fields on the [*General information*] tab:

Alternate names	Aliases or additional names of the account, for example, the abbreviation of the company name.
Company code	Code number of the account. It is used to distinguish companies with identical names. The account number is non-editable and is filled in automatically based on the specified template. Use the “Account number mask” system setting to customize auto numbering for the accounts.

8. Specify more information about the account on the [*Categorization*] detail. The detail fields are displayed when you select the corresponding commands in the + menu.

No. of employees	The approximate number of employees in the company, for example, “51–100” or “501–1000.”
Business entity	Type of legal entity of the company, for example, “LLP”, “Ltd.”, or “Inc.”
Annual revenue	Possible annual revenue ranges for companies, for example, “15–20 million” or “20–30 million.”

9. Specify the addresses and communication options of the contact. Learn more in the “Manage contact communication options” article.

10. Specify the payment details of the company on the [*Banking details*] detail. The detail fields are displayed when you select the corresponding commands in the + menu.

<table>
<tr><td>Account</td><td>Name of the company whose banking details are given. This is a non-editable field.</td></tr>
<tr><td>Opportunity name</td><td>Name or type of the account's banking information, for example, the “Main account.”</td></tr>
<tr><td>Manager</td><td rowspan="2">Names of the chief accountant and CEO of the company.</td></tr>
<tr><td>Chief accountant</td></tr>
<tr><td>Country</td><td>Country of the banking details for the account If the selected country has a specific template for banking details in the [Countries] lookup, then this template will appear in the [Banking details] field.</td></tr>
<tr><td>Banking details</td><td>Complete information on the account's banking details, for example, account number, SWIFT number, ABA Code, etc.</td></tr>
<tr><td>Description</td><td>Additional information about the banking details,</td></tr>
</table>

11. Add dates important for the account on the [*Noteworthy events*] detail. The detail fields are displayed when you select the corresponding commands in the + menu.

Type	Type of the noteworthy event, for example, “Company day.” Defined when a record is added. You can change it afterward.
Date	Date of the noteworthy event.

12. Navigate to the [*Contacts and structure*] to add information about the contact persons of the company and the organizational structure.

    a. To add information about the structure and departments of the company, click + on the [*Organization structure*] detail and select one of the two options: [*Add root item*], for example, a company department, or [*Add subordinate item*], for example, a subordinate unit within a department.

Account	Name of the company for which the organizational structure is established. This is a non-editable field.
Part of	The division includes a specific department. This is a non-editable field. It is only displayed on the page of the division that has a parent element.
Division	Name of the company division. If you select a value in the [*Division*] field, this field will be populated with the selected value.
Department	Name of the company department.
Manager	Name of the division manager.
Notes	Additional information about the division.

b. To add a new contact person to the account, click
   +
   on the [*Contacts*] detail. As a result, a new contact page will open with the current account specified in the [*Account*] field. Once the page is saved, the [*Job experience*] detail will display the record about the contact's new place of work.

13. Navigate to the [*Relationships*] tab to add relationships between the selected account and other accounts and contacts. Learn more in the “Create connections between companies and accounts” article.
14. Click [*Save*].

As a result, a new account record will be added to Creatio. Update the account information at any moment, for example, via data enrichment.

Add relationships between accounts and contacts

PRODUCTS: ALL CREATIO PRODUCTS

You can depict any type of relationship between contacts and accounts in Creatio.

Creatio will display all internal and external contact and account relationships as a chart (Fig. 1). The relationships can be depicted with either a vertical hierarchy or horizontal connection.

For instance, depict a relationship between accounts to facilitate centralized communication and streamlined transaction flow with a company group. Intuitively visualize a holding company structure to better understand your company's relationship with the holding company and the affiliates. You can also visualize any account's employee hierarchy or specify both formal and informal relationships between the contacts that work for different accounts.

You can view the relationships on the account or contact page's [*Connected to*] tab. Read more: View the relationship chart.

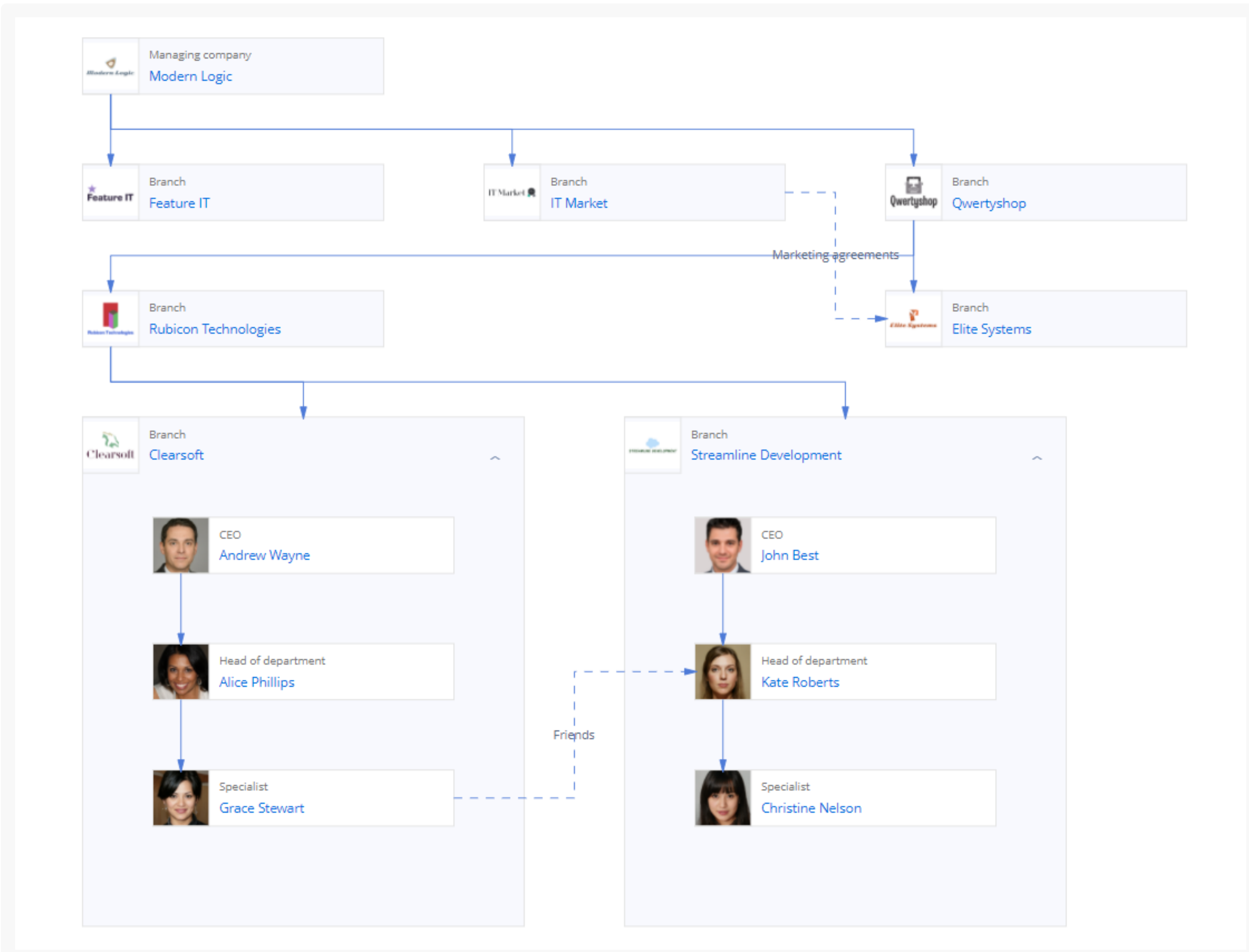
Before setting up the charts, configure all the necessary relationship types in the [*Relationship types*] lookup.

Read more: [Set up relationship types](#).

Once you configure the types, you can start setting up contact and account charts. Read more: [Add relationships to the chart](#).

The chart also lets you group contacts by any relevant criteria. Read more: [Group contacts](#).

Fig. 1 The connection chart



Note. The chart displays all contacts and accounts regardless of your permissions to access them. If you lack permissions to access a particular contact or account, the chart will gray it out and make its details unavailable.

View the relationship chart

The chart is located on the account or contact page's [*Connected to*] tab.

Chart actions

- **Move the chart**: drag it.
- **Expand the chart to the entire page**: click .
- **Expand and collapse the chart blocks**: click and .
- **Delete an element or a relationship from the chart**: select the element, click and confirm deletion.
- **Edit the relationship between the contact and account blocks**: double-click the relationship and make changes in the settings panel that opens to the right.
- **Go to the chart element**: click the element.
- **View the details**: double-click the contact or account block.

Relationship profile

To open the relationship profile (Fig. 2), double-click a contact or an account block on the chart. The relationship profile displays:

- The general contact or account information, including the address and contact details.

  > **Note.** The relationship profile only displays the contact or account information if it is present on the corresponding contact or account page. If there is no data, the profile will not display empty fields. To edit the information, go to the record page by clicking the button on the top right of the relationship profile.

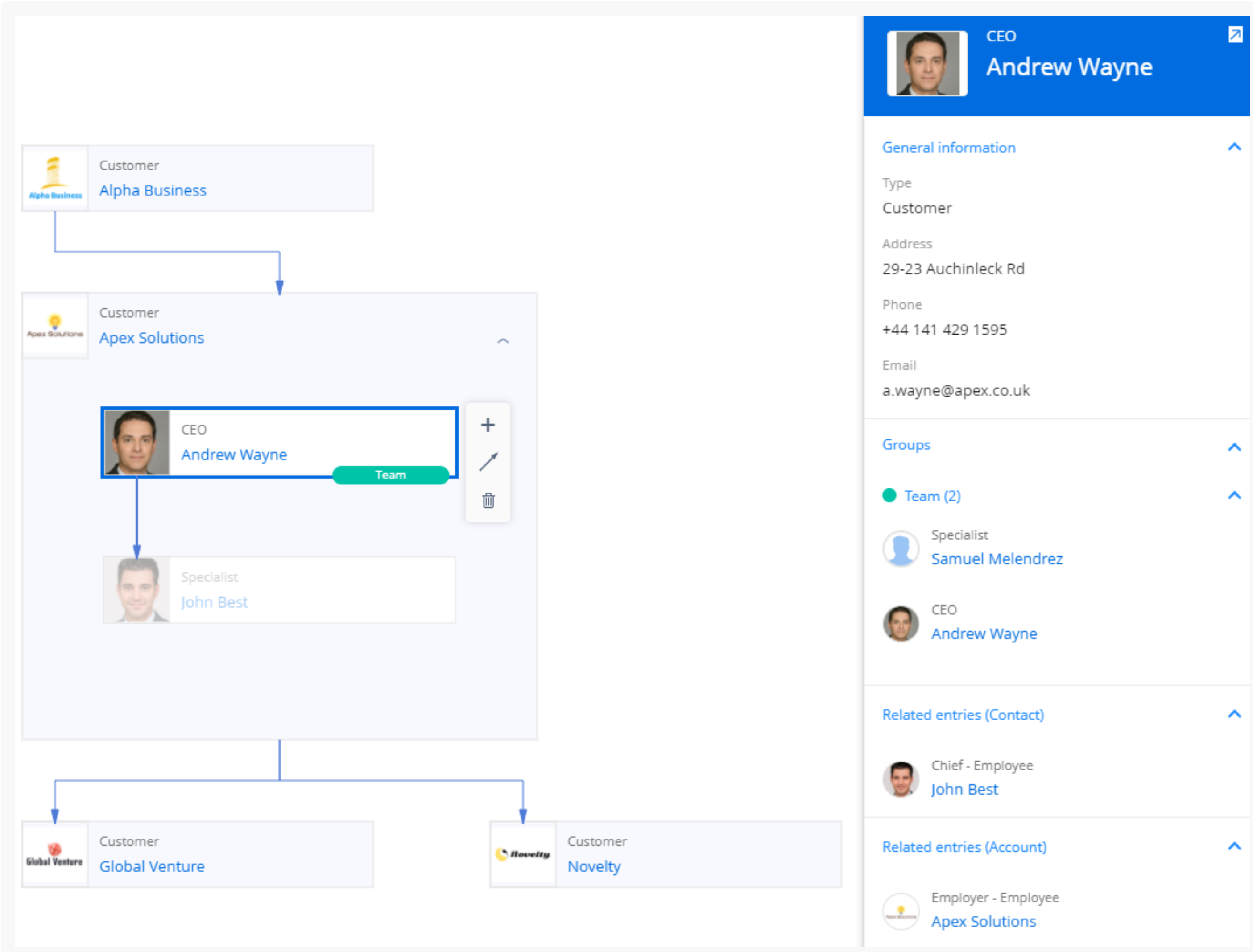
- The contact groups. You can group contacts by any criteria here. Only contacts are supported.

  > **Note.** The contact groups on the relationship chart are independent from the folders in the [*Contacts*] section.

- The related contacts and accounts. This section displays all contacts and accounts that have a depicted relationship with the selected record.

  You can edit or delete the relationship directly from the relationship profile. To do so, click near the relationship and select or , respectively.

Fig. 2 The contact relationship profile



Set up relationship types

Before depicting relationships on the chart, add all the necessary relationship types to the **[*Relationship types*] lookup.** This lookup already contains a list of the most common relationship types. Review the lookup's content and add more records if necessary. We do not recommend deleting the available relationship types as they may already be in use.

Add a new relationship type

1. Click to open the System Designer.
2. Click “Lookups” in the “System setup” group and open the [*Relationship types*] lookup.

> **Note.** Any Creatio user with permissions to “Access to “Lookups” section” (“CanManageLookups” code) system operation can perform the setup.

3. Click [*New relation type*].
4. Fill out the new lookup record's fields (Fig. 3).

a. Enter the relationship name the chart will use in the [*Name*] field.

b. Add the record that specifies the opposite vector of this relationship to the [*Inverse relationship*] field. If you are setting up a relationship with a "Horizontal connection" position, add the record itself to this field.

> **Attention.** To ensure the chart depicts the relationships correctly, fill out the [*Inverse relationship*] field for all records.

> **Note.** If the record's pair does not exist yet, leave this field empty, create the inverse relationship record, and come back to setting up the field.

See the inverse relationship examples below.

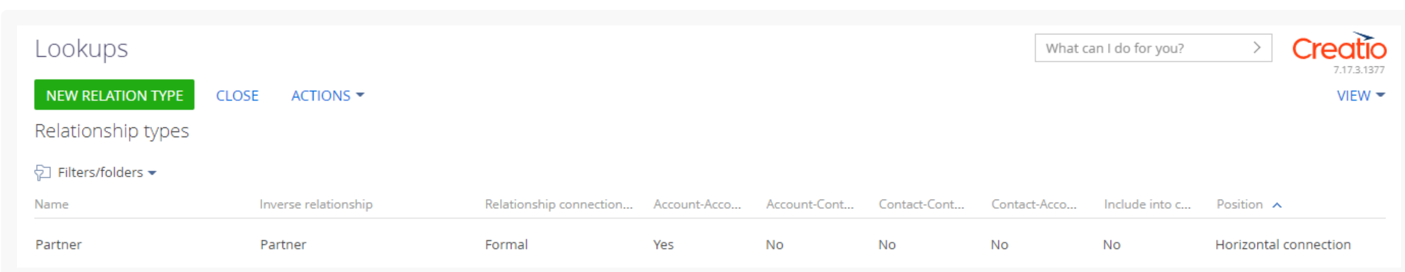
c. Specify the connection type in the [*Relationship connection type*] column. The type can be "Formal" or "Not formal." Learn more: Relationship parameters.

d. Specify the record pairs that are valid for the relationship in the [*Account-Account*], [*Account-Contact*], [*Contact-Contact*], and [*Contact-Account*] columns.

e. The [*Include into container*] column is non-editable. If Creatio sets it to "Yes," the contact will appear inside the relevant account block on the chart. Read more: Relationship parameters.

f. Specify the element's position on the chart in the [*Position*] column. Learn more: Relationship parameters.

Fig. 3 Set up a relationship between partners



Relationship parameters

Use the following relationship parameters to customize the relationship type:

1. Specify whether the relationship is formal or informal in the **Relationship connection type** parameter:

   - Use the "**Formal**" type for clear, structural relationships. For example, select this type to visualize relationships between managers and subordinates or holding companies and affiliate companies.

     You can establish a formal relationship between contacts if one of them has a formal relationship with an account.

   - Use the "**Not formal**" type for unclear relationships. For example, select this type to visualize a non-hierarchical relationship.

2. Specify the element's position relative to the connected element in the **Position** parameter.

   - Select "**Horizontal connection**" if the connected element is on the same hierarchical level. For example, use a horizontal connection to connect two department heads of a single company.

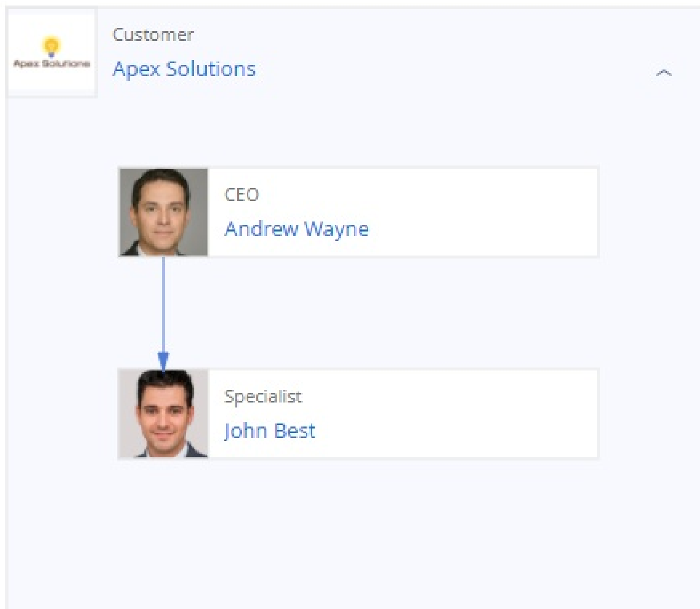
- Select “**Direct connection**” if the connected element is on the lower hierarchical level. For example, use a direct connection for “Employer-Employee,” “Chief-Employee,” “Holding company-Affiliate company” relationship types.
- Select “**Reverse connection**” if the connected element is on the higher hierarchical level. For example, use a reverse connection for “Employee-Chief,” “Employee-Employer,” “Affiliate company-Holding company” relationship types.

3. Specify the contact block position relative to the account block in the **Include into container** parameter. Creatio sets this option automatically depending on the relationship type and the connected objects (account or contact).

    - **The [*Include into container*] checkbox is always selected** for “Account-Contact,” “Contact-Contact,” and “Contact-Account” formal relationships.

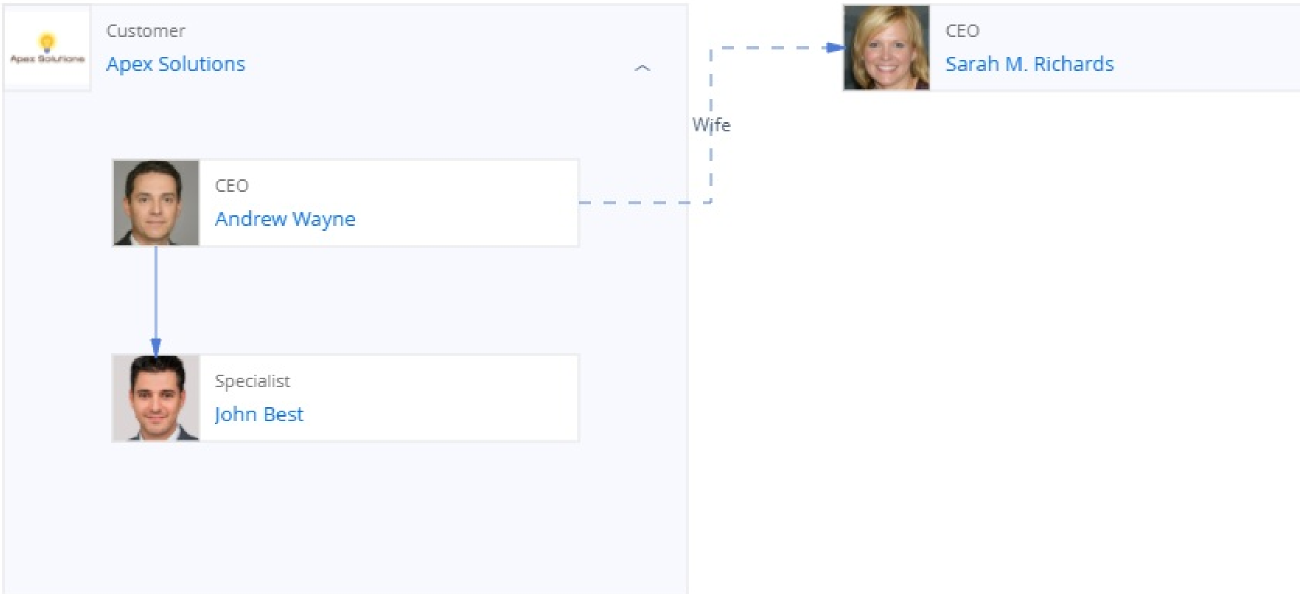
      For example, Creatio automatically selects the [*Include into container*] checkbox for the “Chief-Employee” formal relationship. The chart places both contact blocks inside the Apex Solutions account block (Fig. 4).

      Fig. 4 The selected [*Include into container*] checkbox

    - **The [*Include into container*] checkbox is always cleared** for “Account-Contact,” “Contact-Contact,” “Contact-Account” informal relationships, as well as for all “Account-Account” relationships. For example, Creatio does not select the [*Include into container*] checkbox for the “Relative-Relative” informal relationship. The chart places the contact block outside the account block (Fig. 5).

      Fig. 5 The cleared [*Include into container*] checkbox



Keep the following in mind when setting up the parameters:

- The elements with **formal** relationship are usually structured **vertically** on the chart, appearing higher or lower relative to each other depending on the Position parameter.
- Always select "**Direct connection**" or "**Reverse connection**" for **formal** relationships between contacts or a contact and an account. These relationships can only exist in pairs. For example, if you create a "Managing company-Branch" relationship with a direct connection, make sure to add another record for a "Branch-Managing company" relationship with a reverse connection.
- Only a relationship between accounts can both be **formal** and have a **horizontal position**.
- The elements with **informal** relationship are usually placed on the same vertical level, thus requiring a **horizontal position**. If you do need to display an informal hierarchical relationship, set a "**Direct connection**" or "**Reverse connection**" position for this relationship, similar to formal relationships.

Relationship type setup examples

Example. Set up a relationship between a lawyer and a client.

To do so, add a "Lawyer" and "Client" relationship pair.

"Lawyer" relationship settings:

- Set the name to "Lawyer."
- Set the inverse relationship to "Client."

Note. If the "Client" relationship does not exist yet, leave the [*Inverse relationship*] column empty and come back to it later.

- Set the relationship connection type to “Formal.”
- Select the [*Contact-Contact*] checkbox.
- Set the position to “Direct connection.”

“Client” relationship settings:

- Set the name to “Client.”
- Set the inverse relationship to “Lawyer.”
- Set the relationship connection type to “Formal.”
- Select the [*Contact-Contact*] checkbox.
- Set the position to “Reverse connection.”

Example. Set up a non-hierarchical relationship between partner companies.

Add a “Partner” relationship and connect it to itself.

1. Set the name to “Partner.”
   a. Set the relationship connection type to “Formal.”
   b. Select the [*Account-Account*] checkbox.
   c. Set the position to “Horizontal connection.”

Save the relationship, then add the “Partner” relationship itself to the [*Reverse connection*] column.

Add relationships to the chart

Once you add all the necessary relationships to the [*Relationship types*] lookup, you can start setting up contact and account charts. For example, here is how you can depict relationships with a contact.

Example. Depict relationships with the contact's manager and the contact's father. The father is an employee of a different account.

Depict the “Chief-Employee” formal relationship and the “Relative-Relative” informal relationship:

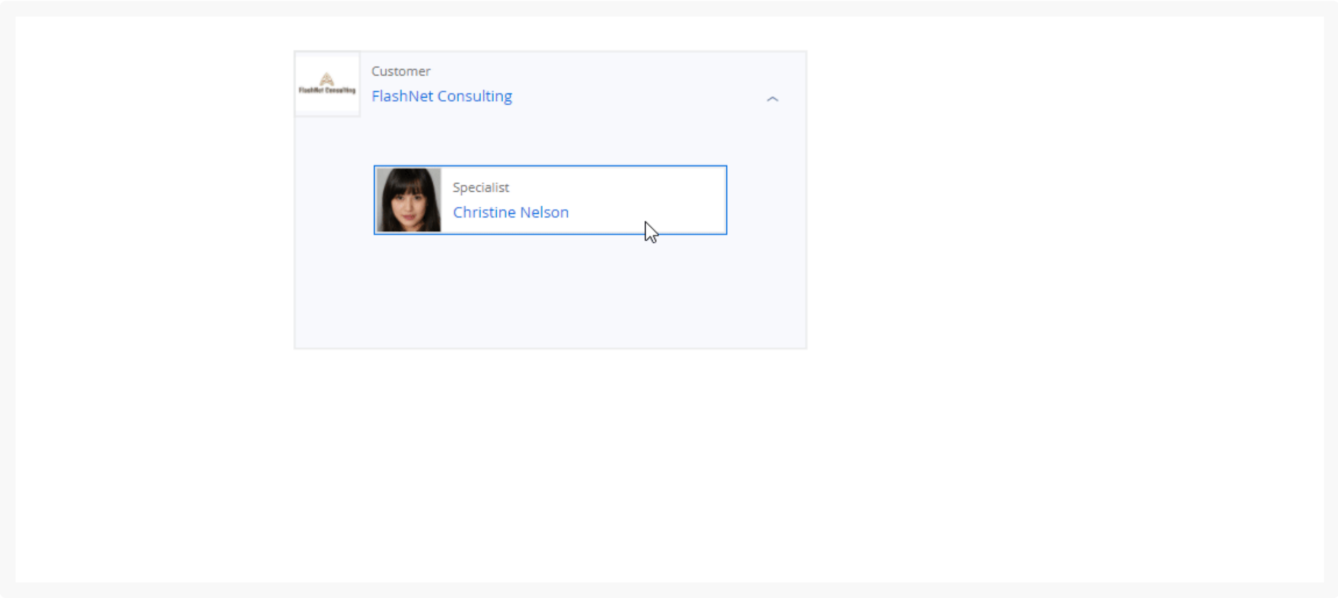
1. Go to the [*Contacts*] section and open the necessary record.
2. Go to the [*Connected to*] tab.

   This opens a block that contains the employee photo, name, and the job title.
3. Select the block and click [+] on the right.
4. Specify the details of the new relationship details (Fig. 6):
   a. Leave the dropdown list at the top of the relationship profile as “Formal.”
   b. Select “Employee-Chief” in the [*Relationship type*] dropdown list. The list lets you select all types of formal relationships between contacts.

c. Select the relevant contact from the [*Contact*] dropdown list.

d. Add a comment in the Comment field if needed. The comment will appear on the chart. If you need to edit the comment after adding it to the chart, double-click the arrow and make changes in the [*Comment*] field of the setup box that opens.

Fig. 6 Setting up the relationship information

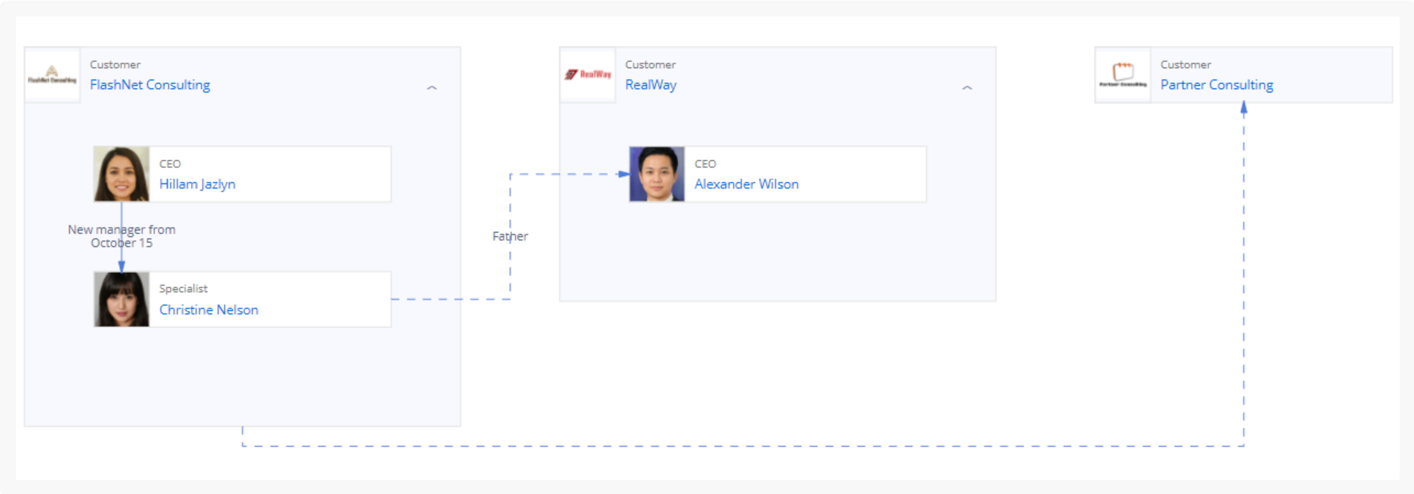


Note. If you depicted a relationship by mistake, click 🗑 on the panel to the right and confirm deletion.

5. Depict the “Relative-Relative” relationship type in a similar way. Specify the relation degree in the [*Comment*] field.

This will add the new relationships to the chart. If you have previously depicted other relationships with these records, these relationships will also appear on the chart (Fig. 7).

Fig. 7 A fully set up contact relationship chart

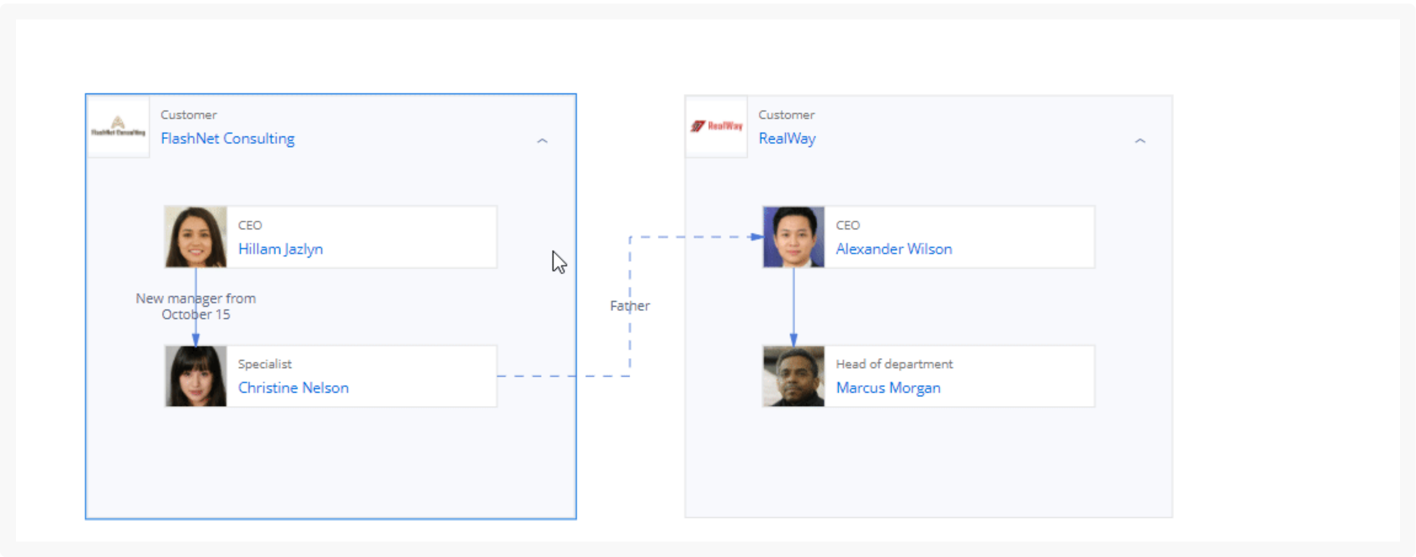


In this example, the FlashNet Consulting account has relationships with the company employees and a different account. If you depict a relationship between employees who work for different companies, the chart will display all existing relationships, including the connection between one of the employer accounts and a different account.

Attention. A contact can only be an employee of a single account. If you have already depicted an “Employee-Employer” formal relationship type between a contact and an account, you will receive an error message when attempting to depict a similar relationship between an employee and a different account. You can depict informal relationships instead.

If necessary, you can **depict a relationship** between the elements directly from the chart. Select one of the elements, click , drag the arrow to the second element and fill out the relationship details (Fig. 8).

Fig. 8 Depicting a new relationship from the chart



New relationship examples

Example. Add an affiliate account to the holding company's chart.

- Start the setup on the main account page.
- Add an account.
- Set the dropdown list at the top of the relationship profile to “Formal.”
- Set the relationship type to “Holding company-Affiliate company.”
- Select the affiliate account record.

Example. Add a branch to the company's chart.

- Start the setup on the managing company's page.

- Add an account.
- Set the dropdown list at the top of the relationship profile to “Formal.”
- Set the relationship type to “Managing company-Branch.”
- Select the branch account record.

Example. Add a former employer to the employee's chart.

- Start the setup on the contact page.
- Add an account.
- Set the dropdown list at the top of the relationship profile to “Not formal.”
- Set the relationship type to “Employee-Former employer.”
- Select the account record of the former employer.

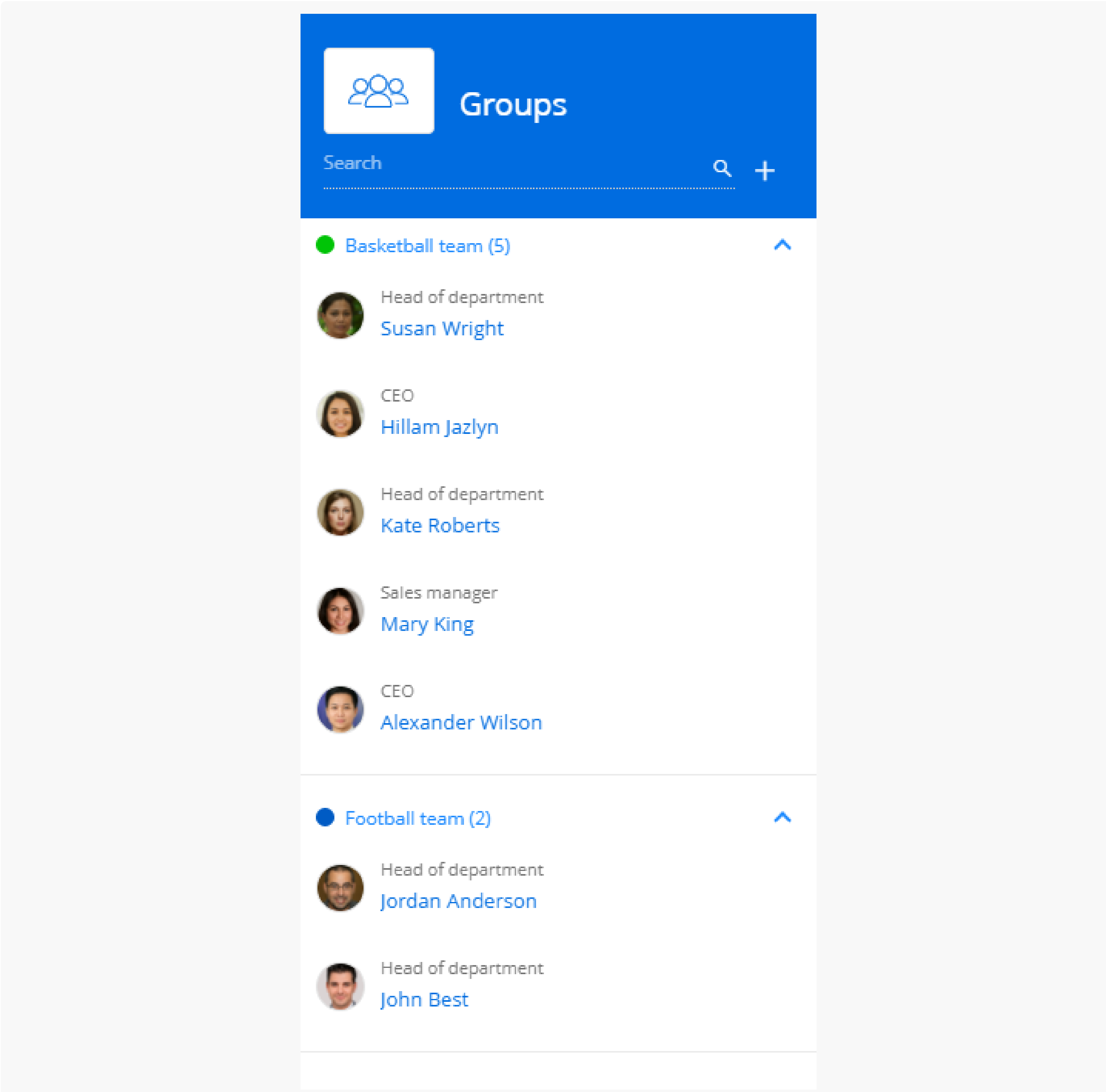
Group contacts

Use relationship groups to combine contacts by any criteria, even if the contacts do not have any other relationships. You can group contacts both within and outside an organization. For instance, you can group the sports team members who are employed by different accounts and do not have any other formal or informal relationships between each other (Fig. 9).

To view the group membership, bring up the contact relationship profile or hover over the contact block on the chart.

Note. The contact groups on the relationship chart are independent from the folders in the [*Contacts*] section.

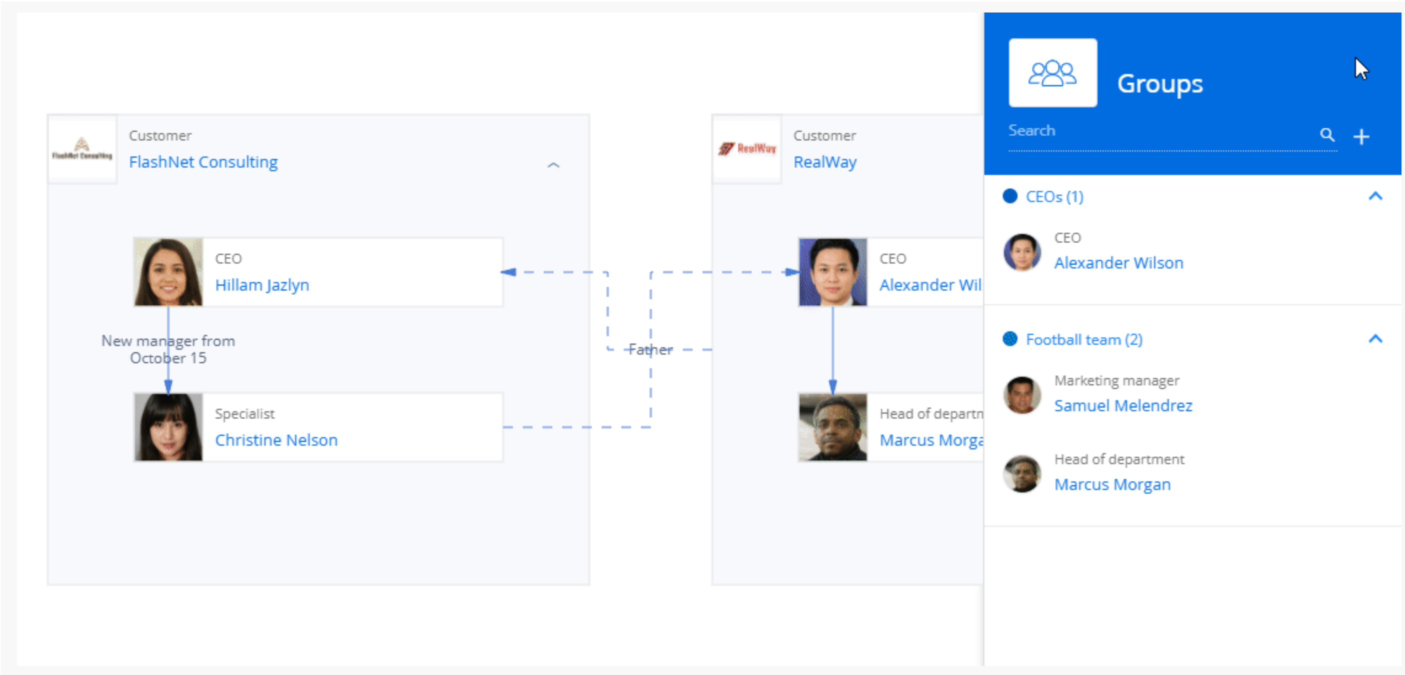
Fig. 9 Contact relationship groups



Add a new group

1. Go to the contact or account page's [*Connected to*] tab and click .
2. Click [+].
3. Specify the group name in the [*Name*] field. The group color is set automatically, but you can change it.
4. Add a comment in the Comment field if needed.
5. Click [*Save*] (Fig. 10).

Fig. 10 Adding a new group to the chart



This will add a new group to the contact group list.

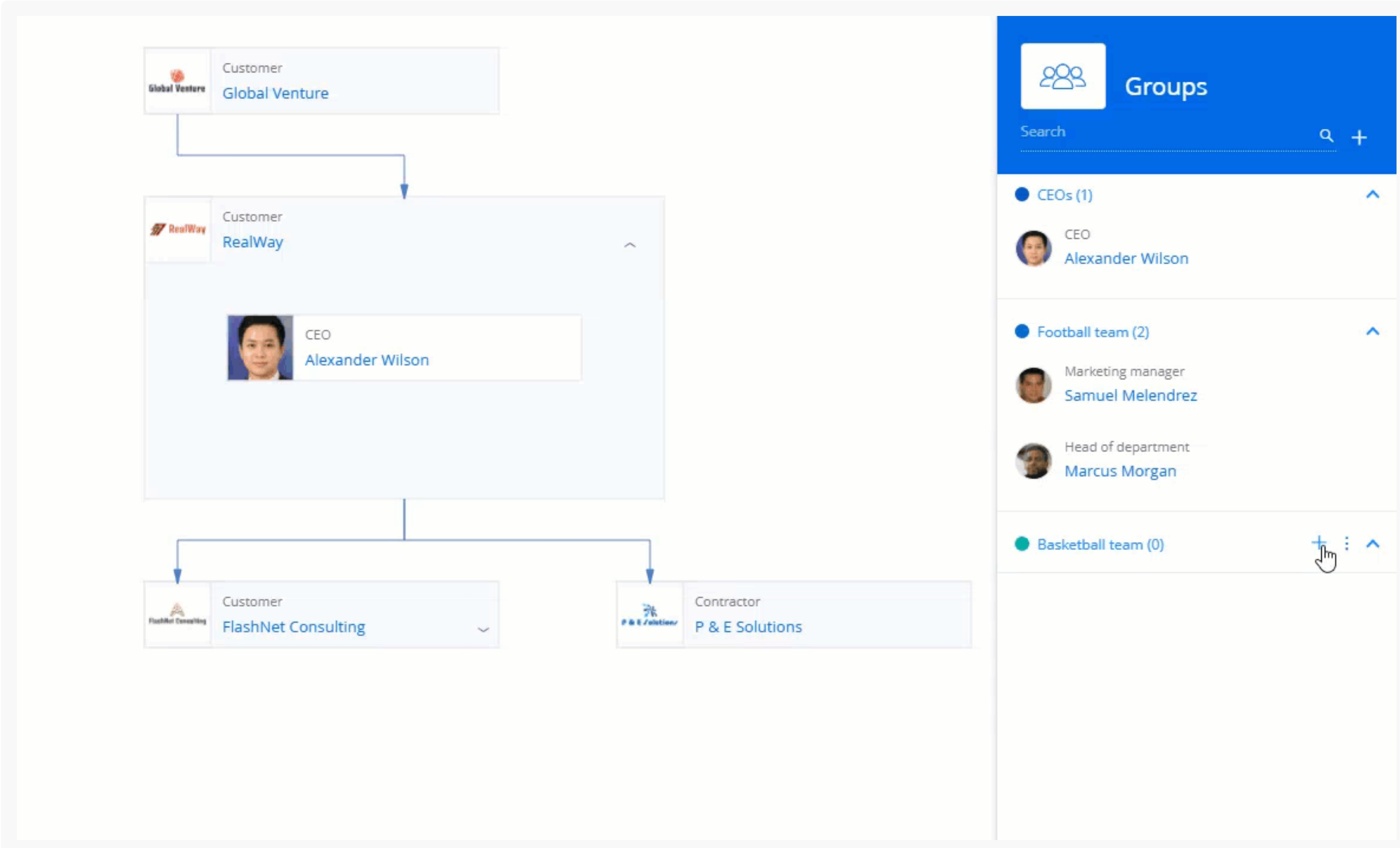
The ⋮ button next to the group name has the following options:

- **Edit the group name** and/or **add a comment**: click ✎ .
- **Delete the group**: click 🗑 and confirm deletion.
- **Highlight all the group's contacts on the chart**: click 👁. Contacts that do not belong to the group will become inactive on the chart.

Add a contact to the group

1. Go to the contact or account page's [*Connected to*] tab and click .
2. Select the relevant group and click [+] next to its name. This opens a box.
3. Select the relevant contact in the box that opens.
4. Add a comment in the Comment field if needed.
5. Click [*Save*] (Fig. 11).

Fig. 11 Adding a new contact to the group



This will add a new contact to the group.

The ⋮ button next to the group member name has the following options:

- **Add a comment to the group member**: click .
- **Delete the member from the group**: click and confirm deletion.

Calculate contact age

PRODUCTS: ALL CREATIO PRODUCTS

Creatio automatically calculates contact age based on the value in the [*Birthdate*] field for customer database segmentation. If the [*Birthdate*] field is empty on the contact page, the value in the [*Age*] field will be “0.” Please take this into account when setting up filters that use this field.

Creatio updates the value in the [*Age*] column in the following instances:

- Whenever a new contact record **is saved** or the value in the [*Birthdate*] field is updated. In this case, the value in the [*Age*] field is updated only for the current contact.
- On **running** the [*Update the values in the “Age” column*] action in the [*Contacts*] section. In this case, the age will update all contacts.
- **Daily**, at a specific time. The age is calculated only for those contacts whose birthday is on the current day.

Set up age calculation

The following age calculation settings are available:

- set up a time for daily updating of contact ages
- disable daily update of contact age
- disable any automatic updates of contact age.

Use the system settings in the “Contact age” folder.

> **Note.** The list of system settings is available in a separate article. Be sure to specify the system setting code (as opposed to its localizable title).
> Users require permission to the “Can run actualize contact age process” (the “CanRunActualizeContactAgeProcess” code) system action.

To **set up regular automatic updates of contact age**, go to the [*Contacts*] section and run [*Actions*] > [*Schedule daily update of the “Age” column*]. If you change the time using the action in the [*Contacts*] section, the modifications will apply during the next age update.

To **disable daily updating** of the [*Age*] column, clear the checkbox in the “Enable automatic daily update of the contact ages” (the “RunAgeActualizationDaily” code) system setting. After this, the age calculation function will be performed only on saving contact records.

To **disable age calculation completely**, clear the checkbox in the “Enable updating contact ages” (the “ActualizeAge” code) system setting. This disables the age calculation functionality, regardless of the values of other system settings in the “Contact age” folder. If the age calculation functionality is disabled, the [*Age*] field on the contact page becomes editable.

Percentage of profile completion

PRODUCTS: ALL CREATIO PRODUCTS

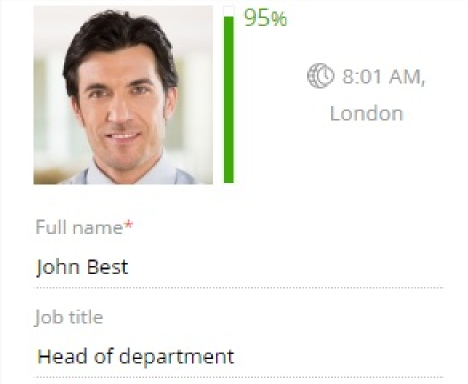
In Creatio, you can monitor the percentage of profile data completeness for contacts and accounts, as well as track process flow using convenient visual tools. Configure how the percentage of data is calculated taking into account the nature of your business. The system will ask you to fill in the missing data for each account, contact, or opportunity page.

The system allows you to set up complete data analytics and view information grouped by owners.

Analyze profile data

The indicator on an account, contact, or opportunity page displays the percentage of profile data that is complete (Fig. 1). The profile data complete indicator is located at the top left corner of a user page.

Fig. 1 – Contact page data indicator



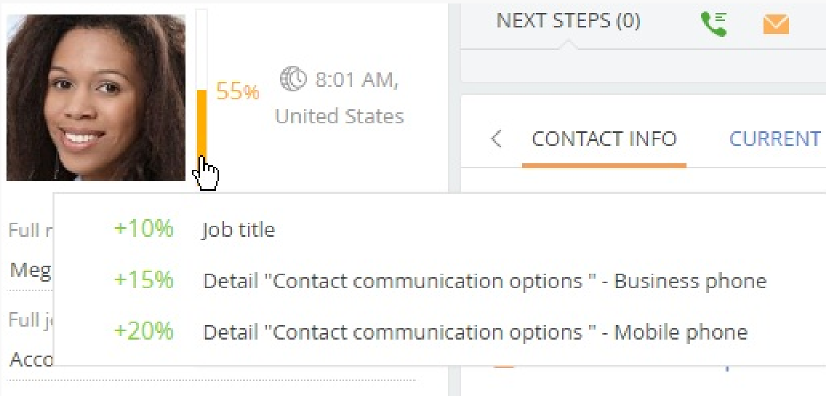
Note. The profile completeness indicator is recalculated upon opening the contact or account page and when saving or changing the recalculation rules in the lookup. To update the percentage in bulk, for example, after importing data from Excel, run the [*Update the profile data population*] business process.

The unsatisfactory data percentage is marked red on the indicator, the satisfactory data percentage is marked yellow and the complete data percentage is of green color.

The indicator also shows the total percentage of data completeness. The indicator readings will depend on how many fields are filled in on a page. You can modify how each value item on a page will contribute to the calculation of profile data complete. For example, you can set up the calculation so that filling in the "Role" field on a contact page will add 10% to the percentage of the profile data complete.

Click the indicator to view a hint about how many fields or details should be filled in to increase the percentage displayed. If there are several unfilled items, they will be displayed in the descending order of the percentage that they add to the indicator when filled in (Fig. 2).

Fig. 2 – Hints about completing a contact page profile



Complete data calculation settings

Creatio allows you to customize the parameters used for the calculation of the profile data. You can set up the scale to be displayed on a contact, account, or opportunity page.

The data complete calculation can be customized for the [*Contacts*], [*Accounts*], and [*Opportunities*] sections. The customization process is similar for all these sections.

To set up the data complete calculation for contacts or opportunities:

1. Open the System Designer by clicking in the top right corner of the application.
2. Click the [*Lookups*] link in the [*System setup*] block.

> **Note.** You can set up access rights to this action using the [*Access to "Lookups" section*] system operation.

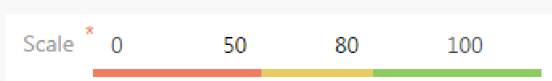
3. Select the [*Data entry compliance*] lookup in the list Select the lookup record and click the [*Open content*] button.
4. On the opened page, select the section for which you want to configure the data complete calculation: [*Contacts*], [*Accounts*], or [*Opportunities*].
5. For example, let's configure the data complete calculation settings for contacts. To do this, select the [*Contacts*] record in the list and click [*Open*].
6. On the opened page, set up the scale and the parameters of the indicator.

Set up the indicator scale

The incomplete data percentage is marked red on the indicator, the satisfactory data percentage is marked yellow and the complete data percentage is of green color (Fig. 3).
To set up the profile data complete indicator, map the value ranges to incomplete, satisfactory, and complete profile data. To do this:

1. Specify the upper limit of the range that maps to the incomplete profile data. This is the lowest possible value that is satisfactory. By default, it is set to "50%."
2. Specify the upper limit of the range for the satisfactory level of the profile data complete. This value will also serve as the lower limit for the "complete" level. For example, enter "80%."

Fig. 3 – Profile data complete indicator



The lower limit of the incomplete data range is non-editable and always equals "0%". Similarly, the upper limit of the complete data range is non-editable and always equals "100%."

Set up indicator attributes

You can set up the indicator attributes to define how different types of entered profile data impact the profile completion percentage. For example, you can change the settings so that entering information about the contact's company will add 15% to the profile data completion.

To do this:

1. Go to the [*Attributes*] detail toolbar and click the
   +
   button.

   > **Note.** The total percentage of the data complete attributes must equal 100%. You can add a new attribute only if the total percentage of the already added attributes is less than 100%.

2. Select the required attribute from the drop-down menu. An attribute can be:
   a. A field value on a page. For example, the contact role.
      Numeric fields are considered filled in if they contain any value other than 0.
   b. Information on connected tabs. For example, calls connected to a contact.
      The [*Activities*] detail displays the connected "Task" type activities only.
   c. Values for different types of detail fields.
      The [*Addresses*] and [*Communication options*] tabs of contacts and accounts have different types of values to be filled in their fields. Each address type (legal, postal, etc.) and each communication option (mobile phone, email, etc.) is considered a separate attribute.
3. Specify the percentage that the attribute adds to the profile completion indicator. For example, you can set up the calculation so that specifying a mobile phone number for a contact will make the profile data 25% more complete. You can configure other attributes in the same manner. When you add a new attribute to the [*Data population percentage*] column, the maximum possible value is set by default.

When you finish the setup process, save the changes made to the [*Data entry compliance*] lookup. All indicators displaying the profile data complete are updated automatically.

Manage communication options and addresses

PRODUCTS: ALL CREATIO PRODUCTS

In Creatio, you can manage the communication options and addresses of contacts and accounts using the [*General information*] tab on their pages. Add addresses and communication options, look them up on a map, and restrict the usage of specific communication options.

Add a communication option

Use the [*Communication options*] detail to specify the communication options of a contact or account. To do this:

1. Go to the [*Contacts*] or [*Accounts*] section and open the needed record.
2. Click [*General information*] → [*Operations*] → +.
3. Select communication option to add:

- [*Business phone*], [*Mobile phone*], [*Home phone*]. Phone numbers that can be used to contact the person. Communication option types are defined when a record is added. You can change the options later. The fields are available for contact profiles.
- [*Primary phone*], [*Alternate phone*], [*Fax*]. Phone numbers that can be used to contact the company. Communication option types are defined when a record is added. You can change the options later. The fields are available for account profiles.
- [*Web*], [*Email*]. Website and email addresses of the contact. The record list displays the last of the entered email addresses of the contact or account.
- [*Facebook*], [*Twitter*]. Social network profiles of the contact or account. A separate page is used to link social network profiles to accounts or contacts.
- [*Skype*]. The contact's Skype account. The field is available for contact profiles.

4. Enter the data using the standard format for this communication option.
5. Click [*Save*].

You can use default types of communication options or add custom ones. Use the [*Communication option types*] lookup to add custom types of communication options. Custom communication option types fall into one of the pre-set communication types, such as Email, Phone, Skype, SMS, Social network, or Web. Be sure to select one when adding a custom communication option type.

Attention. If the Microsoft Exchange integration is configured, it is not recommended to change default communication option types, since this may lead to synchronization errors.

Restrict the usage of a contact's communication options

If a contact prefers some communication options and finds the usage of the other options unacceptable, you can display this information on the [*Communication options*] detail. To do this, click + → [*Do not use*] → select the needed option.

- [*Do not use email*]
- [*Do not use phone*]
- [*Do not use SMS*]
- [*Do not use mail*]
- [*Do not use fax*]

Checkboxes signify which communication options cannot be used to contact the person. For example, if a contact does not wish to receive mails, select the [*Do not use mail*] checkbox. For example, if a contact did not consent to receive emails, select the [*Do not use Email*] checkbox.

If the “Unsubscribe user from all bulk emails” system setting is enabled, the [*Do not use email*] option box will be automatically checked for all contacts who unsubscribed from bulk emails. This functionality is available in Sales Creatio and Marketing Creatio.

When sending bulk emails via the [*Send email*] element in the business process or case, Creatio ignores the [*Do not use email*] checkbox selected in the [*Communication options*] detail.

You can also tag a communication option as invalid. This functionality is available in Marketing Creatio:

- [*Invalid*]. If a communication option is currently not used, it becomes invalid. The “invalid” status appears automatically when the [*Valid*] option is not checked for the selected communication option. It is not displayed on the [*Communication options*] detail but can be used when setting up filters for folders.
- [*Reason for irrelevance*]. The reason why the selected communication option is invalid: “Hard bounce” or “Manual setting.” The field is populated automatically. It is not displayed on the [*Communication options*] detail but can be used when setting up filters for folders.
- [*Invalid from*]. Date from which the selected communication option becomes invalid. The field is populated automatically. It is not displayed on the [*Communication options*] detail but can be used when setting up filters for folders.

Add address

Use the [*Addresses*] detail to specify the addresses of a contact or account. To do this:

1. Go to the [*Contacts*] or [*Accounts*] section and open the needed record.
2. Click [*General information*] → [*Addresses*] → +.
3. Select the type of address to add.
4. Fill out the following fields on the page that opens:

   - [*Address type*]. Type of address of the contact or account. For example, “Home” or “Work” for a contact, “Legal” or “Actual” for an account. Address types are defined when a record is added. You can change the types later.
   - [*Primary*]. Indicates the primary address. Select this checkbox to display this address in the contact or account profile. By default, the [*Primary*] checkbox is selected for the first address added to the [*Addresses*] detail, but you can select this checkbox for a different address at any time. The checkbox in the original record will be cleared.
   - [*Address*]. Street, building, and apartment or office number. The list displays the account or contact’s primary address.
   - [*City*], [*Country*]. The location of the contact or account. The [*State/province*] and [*City*] fields are connected to the [*Country*] field. For example, the [*Country*] field will be populated automatically when you populate the [*City*] field. Similarly, if you enter a province in the [*State/province*], the [*Country*] field will be populated automatically. When you fill out the [*Country*] field, the [*State/province*] and [*City*] fields will display only those regions and cities, which correspond to the selected country. You can associate a region with a certain country in the [*States/provinces*] lookup, and associate a city with a country in the [*Cities*] lookup.
   - [*ZIP*]. ZIP or postal code of the account or contact.

After populating one or several addresses, the [*Show on map*] section action becomes available. Use it to display the location of the selected accounts on the map. If an account has several addresses populated, e. g., physical address and delivery address, the map displays all of the specified addresses. To view the detailed description, click one of the addresses.

The address of an account also displays after clicking on the needed entry in the [*Addresses*] detail. If the location of the account on the map is not correct, move the marker to the correct position and save the changes.

Attention. Creatio displays addresses using the OpenStreetMap service integration. The service is developed and maintained by a third party. Creatio assumes no responsibility for the operation of the service and the content of OpenStreetMap maps.

Manage job experience

PRODUCTS: ALL CREATIO PRODUCTS

Creatio stores the information about a contact’s employment and job experience on the [*Current employment*] tab of the contact page.

To add information about a contact's current employment:

1. Go to the [*Contacts*] section and open the needed record.
2. Populate the following fields on the [*Current employment*] tab:

Position	Position held by the contact, for example, “Department manager.”
Full job title	Exact job title, such as “Sales department manager.” If you select a value in the [*Job title*] field, this field will be filled in with the selected value.
Department	Department of the company where this contact works, for example, “Sales” or “Marketing.”
Role	The contact's influence in the decision-making process, for example, “Decision maker” or “Influencer.”

The data on the [*Current employment*] tab is automatically synced to the [*Job experience*] detail.

This information includes the company name and a day when the contact started working at the company. The [*Primary*] and [*Current*] checkboxes are also selected. When a new record is added in the [*Job experience*] detail, the [*Primary*] and [*Current*] checkboxes are selected for this record, and the [*Started on*] field is filled in with the current date. The [*Current*] checkbox will be cleared for the previous place of work and the [*Worked till*] field will be filled in with the current date.

If you want to add more information about the current and previous employments of a contact, take the following steps:

1. Open the corresponding contact page and go to the [*Current employment*] tab.
2. Click + on the [*Job experience*] detail to add a new record.
   To change an existing record, select it in the detail list, click +, and select [*Edit*].
   Populate or edit the following fields on the page that opens:

Contact	Current contact. The field is non-editable.
Account	Employer of the contact.
Job title	Position held by the contact, for example, “Department manager.”
Full job title	Exact job title, such as “Sales department manager.”
Department	The department of the company where the contact works.
Role	Contact's influence in the decision-making process, for example, “Decision maker” or “Influencer.”
Start date	Date when the employee was assigned to work in this position.
Due date	Date when the employee left the job.
Primary	The checkbox indicates that this place of work is the principal one.
Current	The checkbox indicates the company where the contact works at present.
Reason for job change	The reason why the employee decided to accept this position, for example, “Interesting work” or “Promotion.”
Notes	Additional information about the contact's employment.

Note. A job record with the [*Primary*] and [*Current*] checkboxes set will display in the [*Job experience*] detail.

The data on the [*Job experience*] detail is synchronized with the information in the [*Current employment*] field group. If either of the [*Primary*] and [*Current*] checkboxes is cleared for a record in the [*Job experience*] detail, the data about the place of work will be automatically cleared in the [*Current employment*] field group. When a record with the selected [*Primary*] and [*Current*] checkboxes is modified, the data in the [*Current employment*] field group is updated automatically. If you select the [*Primary*] checkbox for another record in the [*Job experience*] detail, the checkbox will be cleared automatically.

Enrich contact data

PRODUCTS: ALL CREATIO PRODUCTS

Creatio helps to maintain the completeness and relevance of the customer base using the data enrichment feature. Contact profile enrichment is a quick and easy way to update contact records with the latest information about their communications, addresses, noteworthy events, and accounts in the system.

Add new users to Creatio and enrich contact data from email threads, social profiles, and other available sources in a few clicks.

Attention. To enable data enrichment from correspondence and open sources, Creatio on-site users will need to specify a cloud service key in the corresponding system setting – “Enable Email Mining” (EnableEmailMining).

Enrich contact data from the incoming emails

Smart enrichment allows you to maintain up-to-date contact data and create new contacts in a few clicks. When an email is received from a contact, the system automatically searches for new information about the contact in the message text, for example:

- contact full name
- the account name of the contact
- phone numbers
- email addresses
- social network accounts
- websites

If the information is found, add it to the existing contact or create a new contact record.

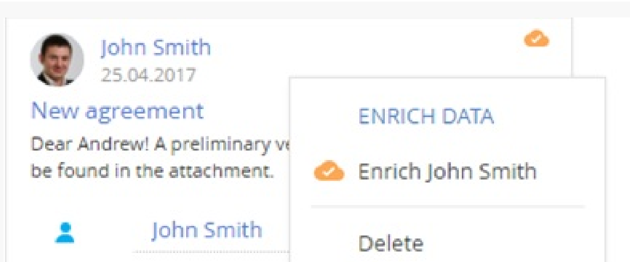
If the communication option type cannot be determined for information found in the email signature, the default communication option type will be assigned to the communication options added during enrichment. For example, for phone numbers, it will be “Business phone,” You can change the type of these communication options on the contact page. The default communication option types are defined in the [*Default type of contact communication options*] system setting.

The incoming emails are checked for enrichment data upon downloading. Creatio analyzes the data in individual emails and email threads (enriching profile data of all thread participants). The signatures of incoming email messages are compared with the contact records in the system. If enrichment data are found, the button appears next to the message header in the email message area of the communication panel.

To enrich a contact profile:

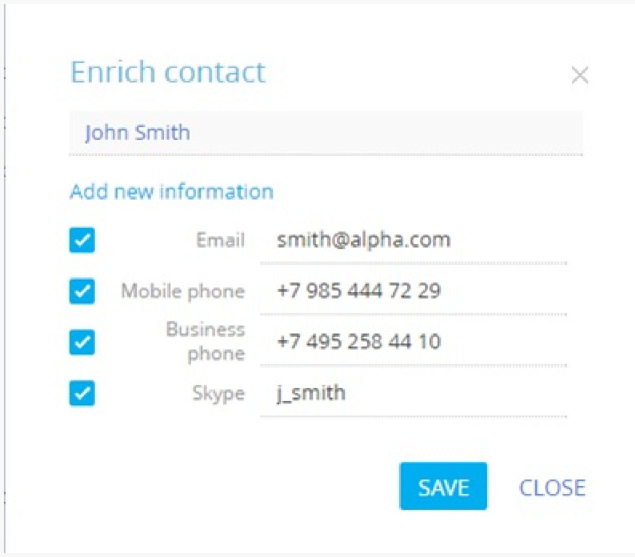
1. Click .
2. A menu with a list of all contacts to create or update records will be displayed. Select the [*Enrich “contact name”*] action (Fig. 1)

Fig. 1 – Enrichment of contacts from the incoming email



3. In the opened window, select the data you want to add to the contact page from the email messages found in the signature (Fig. 2).

Fig. 2 – Data enrichment window



Note. If the message is included in an email thread, the contact enrichment window will contain information on both the current contact and any other contacts identified in the thread, such as contacts from a forwarded message. Check the list of enrichment data before adding them to the system.

4. Save the new data.

   As a result, the information found in the emails will be added to the contact page and updated in all email threads over the previous seven days. The new data will also be reflected in the profile data complete indicator.

   The contact data for enrichment, that was not selected by the user will be remembered by the system and will not be offered for this contact anymore.

Enrich contact profile from the case page

Service Creatio enables you to enrich contact data directly from the email chain on the case page. Use data enrichment on the case page to:

- populate the contact record with new data found in the email signature
- add a new email address to the contact page
- create a new contact based on the email and nickname of the applicant and specify it as a contact for the case.

Attention. Adding a new email address to the contact's page and creating a new contact from the email chain is only available if automatic contact registration for unknown email addresses is disabled. Use the [*Automatically create new contacts for unknown email addresses*] system setting to manage the way Creatio handles unknown email addresses.

Enrich contact profile from the contact page

You can run smart enrichment of the contact data directly from the contact page. If enrichment data is available, the button will appear in the contact profile. Data enrichment from the contact page is similar to the [enrichment data from an email message](#).

After Creatio adds data found in the email thread, the btn_contact_data_enrichment00003.png button will disappear from the communication panel and the contact page. How to enrich contact profile from the case page

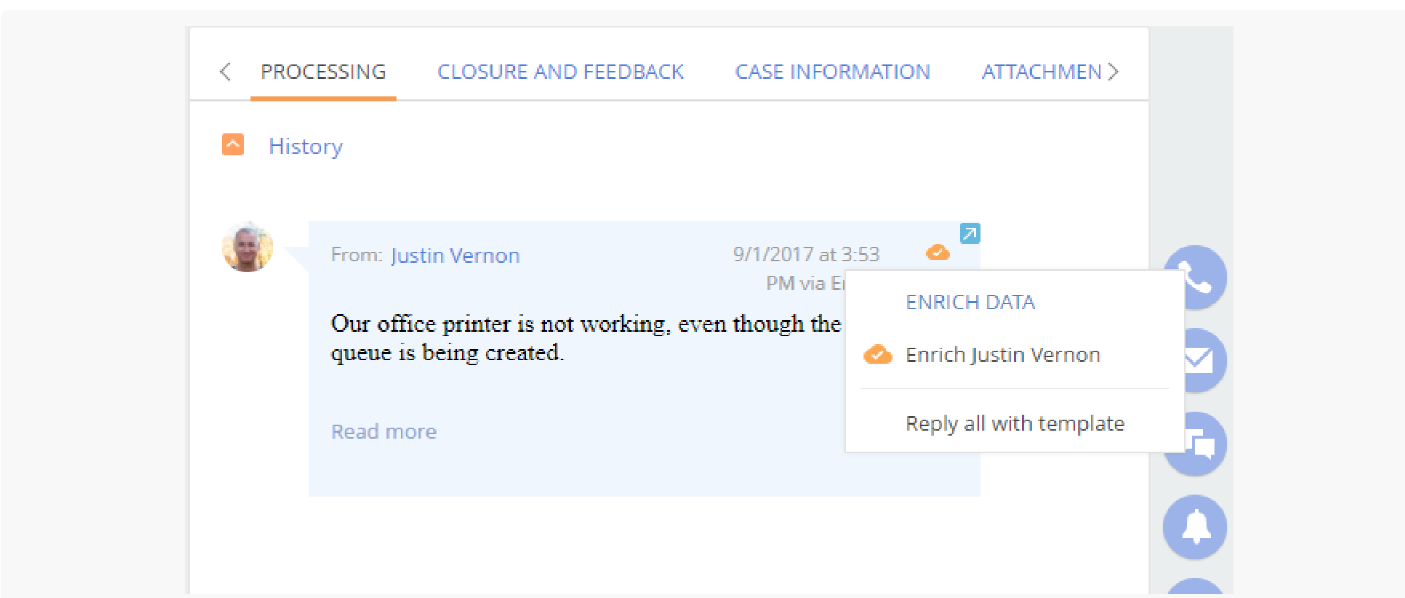
Creatio enables you to enrich contact data directly from the email chain on the case page. Use data enrichment on the case page to:

- populate the contact record with new data found in the email signature
- add a new email address to the contact page
- create a new contact based on the email and nickname of the applicant and specify it as a contact for the case.

Attention. Adding a new email address to the contact's page and creating a new contact from the email chain is only available if automatic contact registration for unknown email addresses is disabled. Use the [*Automatically create new contacts for unknown email addresses*] system setting to manage the way Creatio handles unknown email addresses.

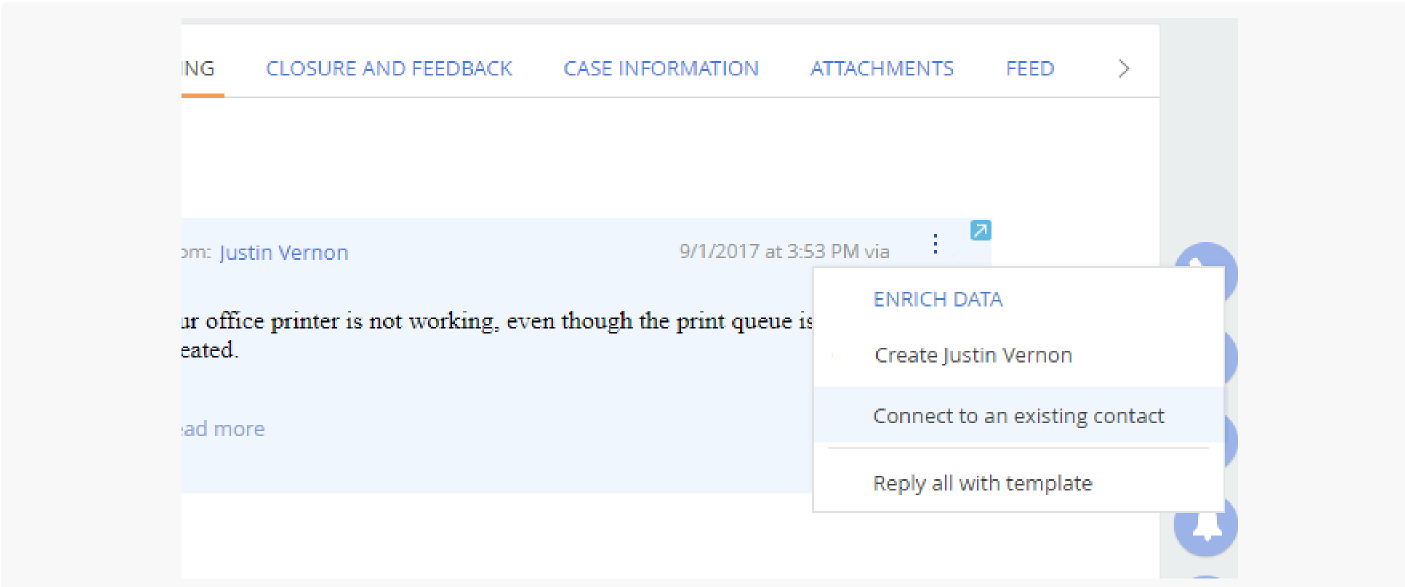
The button will appear in the email chain on the case page If Creatio detects new data in the email signature ([Fig. 3](#)). The process is similar to the [email data enrichment](#) on the communication panel.

Fig. 3 – How to enrich contact profile from the case page



If the case was registered based on an unknown email address of an existing contact, you can easily add the new address to the contact's page directly from the case page. Click the [*Connect to an existing contact*] button and specify the contact to enrich (Fig. 4).

Fig. 4 – Adding an email address for an existing contact



Upon adding a new email address to the contact's communication options, the email will be displayed on the [*Email*] detail on the contact's page. Creatio will prompt you to select the contact as the main contact in the case.

Receive contact information from Facebook

Integration with Facebook allows you to maintain the information about contacts stored in the system.

Run the [*Update with social networks data*] action to receive additional information about a contact. To run the action, specify the Facebook account on the [*Communication option*] detail of the contact page.

Connect a contact to its Facebook account

1. On the contact page, expand the [*Communication options*] detail and click .

   Only one communication option with the "Facebook" type can be added on the contact page.

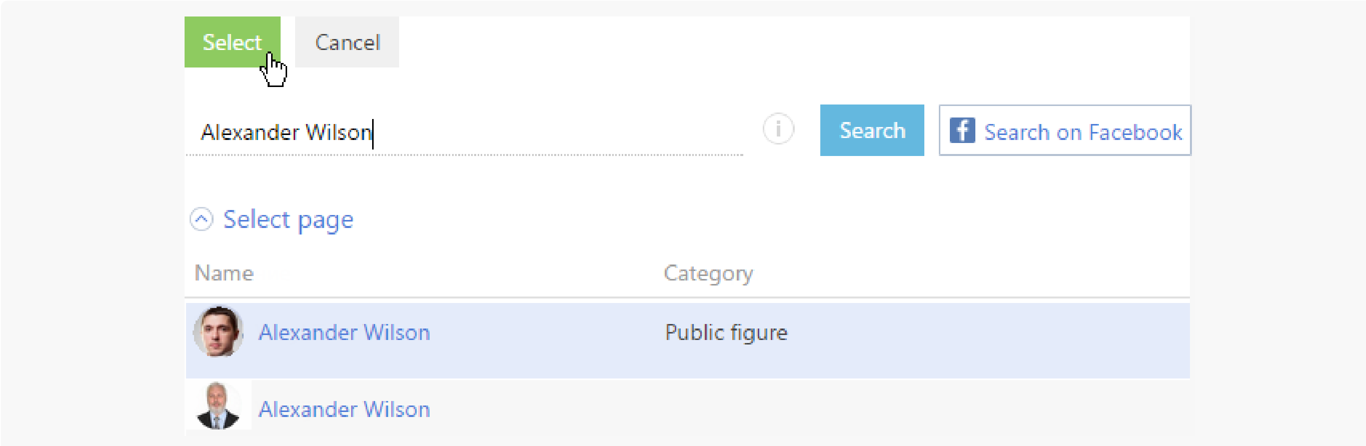
   If you have not used Facebook integration before, the Facebook authorization window will open after you click .

2. The displayed Facebook search page will contain public pages and profile pages of the contact if any. You can change the search criteria or enter the link to the page on Facebook if it is known.

   Note. If the link to the Facebook profile of the account does not have a numeric user ID, the profile will not be displayed among the results.

3. Select an account to add to the [*Communication option*] detail of the contact page (Fig. 5).

Fig. 5 – Selecting a contact account



As a result, a new record with the "Facebook" type will be added to the [*Communication options*] detail. If the account doesn't have a photo, it will be added to the Facebook page.

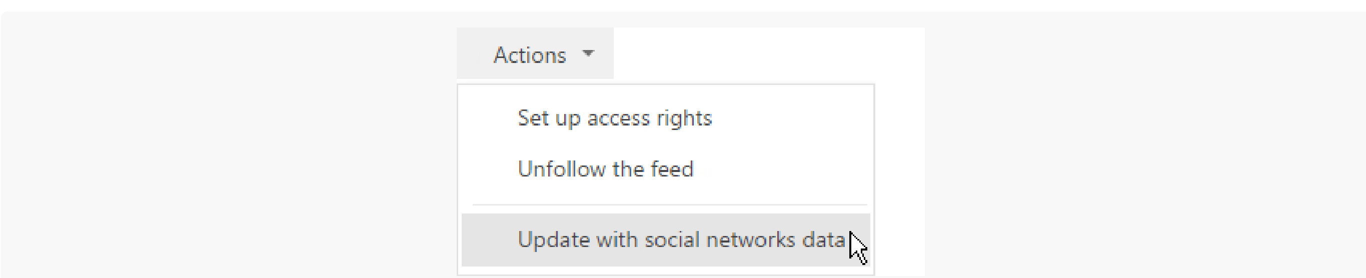
If a contact has both a profile page and a public page on Facebook, we recommend using the public page to populate the [*Communication options*] detail. The public page provides more useful information about the contact.

Populate the contact page with Facebook information

Let's review the example of populating the contact page with a photo from the Facebook page of the contact. Populating the contact page with data from the Facebook public page is described in the "Enrich the account data" article.

1. On the contact page, expand the [*Communication option detail*] and make sure the contact is connected to the proper Facebook account.
2. Select the [*Update with social networks data*] option from the [*Actions*] menu (Fig. 6).

Fig. 6 – Selecting the [*Update with social networks data*] action



3. On the displayed page, you can select a new contact photo and click the [*Save*] button.

   As a result, the contact photo on the contact page will be updated.

FAQ on populating the contact page with Facebook information

Why searching by user page address on Facebook returns no results?

In the Facebook social network, in addition to the profile page, a user can have a public page. Facebook public pages are visible to everyone, regardless of whether a viewer is a registered Facebook user or a Page fan.

Due to changes in the Facebook privacy policy, searching for a user **profile** by the unique page name is unavailable for third-party applications. If the link to the Facebook profile of the account does not have a numeric user ID, the profile will not be displayed among the search results. For example, search request “www.facebook.com/zuck” will return no results, while searching for “https://www.facebook.com/4” will return Mark Zuckerberg’s page.

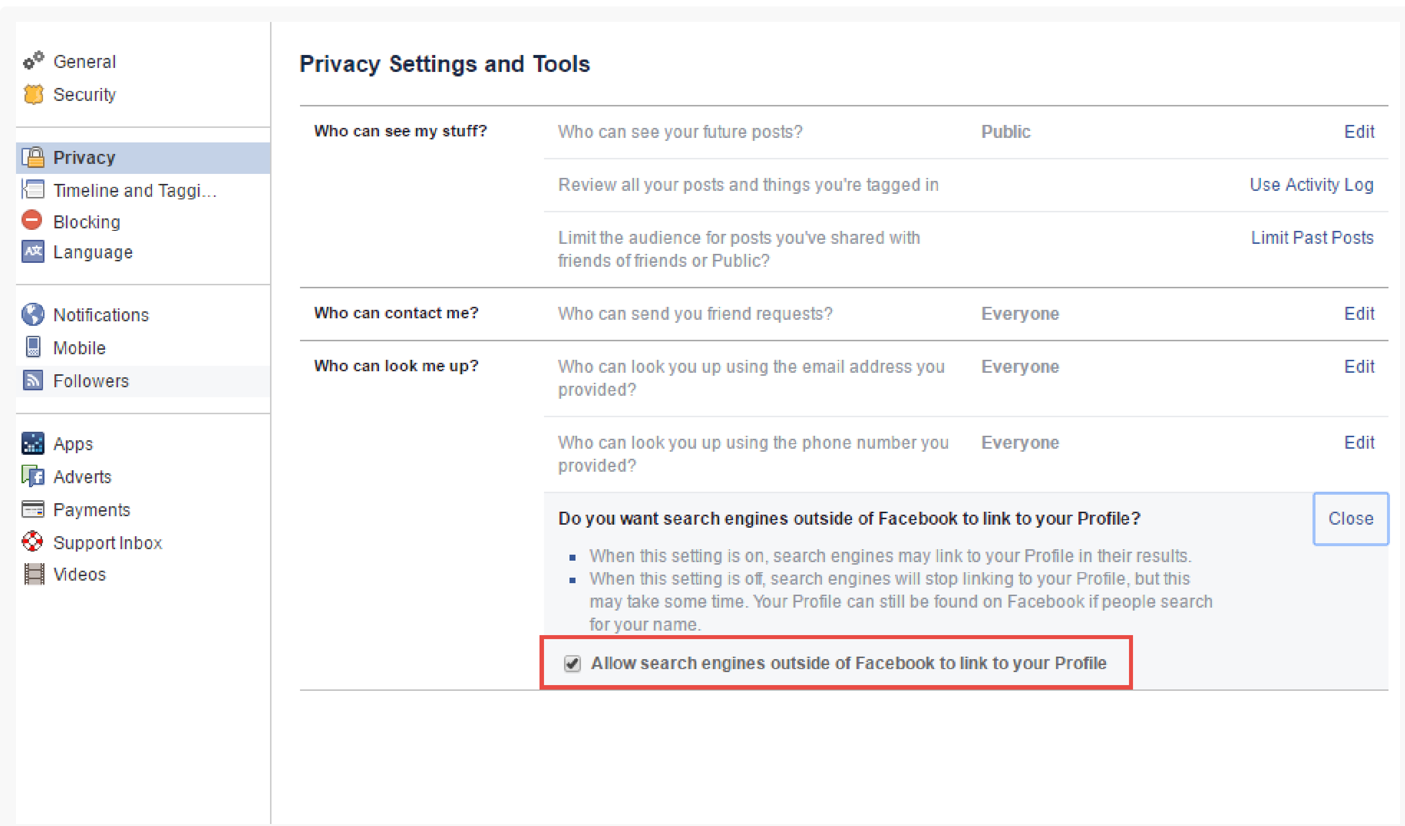
Searching for **public pages** has not changed, they can be found using direct links of any type.

Why aren’t some of the existing pages displayed among the results of the search by Facebook user name and last name?

Facebook search data is provided through the Facebook API. If a Facebook user restricted indexing of their page by search systems, this user’s data will not be found by Creatio.

To search for personal pages via third-party applications, a user must permit tho show their profile in search results (Fig. 7).

Fig. 7 – Facebook privacy settings page



Why does the [*Update with social networks data*] action result in a different number of fields updated for different contact records?

Due to changes in the Facebook privacy policies, third-party applications can only obtain a limited amount of information from personal user pages. If a contact has both a profile page and a public page, it is recommended to add the public page to the [*Communication options*] detail because the public page contains more information about the contact.

Why the field for entering Facebook address becomes inactive after a Facebook profile has been added?

When adding a new Facebook profile link, the field becomes unavailable for editing because Facebook API generates an individual link for every contact.

How to obtain access to the Facebook page of the contact if it is protected by privacy settings?

If the Facebook personal page of the contact is protected by privacy settings, the contact data cannot be enriched from this page. This is due to Facebook's privacy policies. To quickly switch from Creatio to contact data on Facebook, add a link to the user profile on the contact page as a communication option of the “Web” type. This link can be obtained from the enrichment of contacts from the incoming emails if the contact has links for profiles in social networks in the signature or after the search on Facebook.

Enrich account data

PRODUCTS: ALL CREATIO PRODUCTS

Creatio helps to maintain the completeness and relevance of the customer base using the data enrichment feature.

Add the contact information of an account to Creatio from open sources in a few clicks, and enrich the account data using their social profiles.

Attention. To enable data enrichment from correspondence and open sources, Creatio on-site users will need to specify a cloud service key in the corresponding system setting – “Enable Email Mining” (EnableEmailMining).

Profile enrichment includes:

- Adding the company website address and logo on a new account page. This function is performed if you select one of the suggested company names from the drop-down list when filling out the [*Name*] field of a new account record.
- Adding communication options to an account page: phone numbers, email addresses, and social network profile. This is performed automatically when you run the [*Enrich data*] action.
- Adding information from the social network public pages to an account page. Performed by the [*Update with social networks data*] action.

Enrich the account data from the open Internet sources

Use the [*Enrich data*] action to run an automatic search for account information. To run the search, click on the record profile

To access the data enrichment function, you need to have permission for the [*Can enrich account data*] system operation.

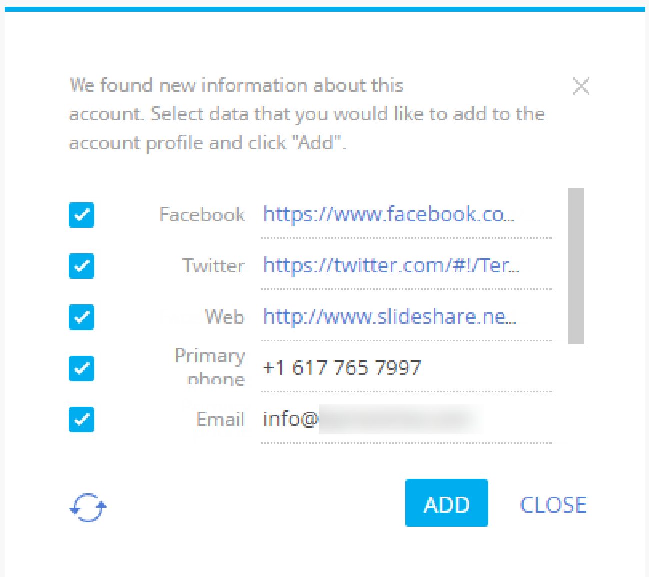
Before running the data enrichment, make sure that the account profile contains at least the company name and website address.

As a result, Creatio will search open sources for the following account data:

- email addresses
- phone numbers
- account profiles on Twitter, LinkedIn, Google+, Youtube, Instagram, SlideShare, and Pinterest social networks.

When the search is complete, a window with a list of found communication options will open (Fig. 1).

Fig. 1 – Data enrichment window



You can edit the communication options in this window. Select records that must be added to the account page and click [*Add*]. The data will be saved on the account page:

- email addresses will be saved as “Email” communication options
- phone numbers will be saved as “Primary phone” communication options
- Facebook profile pages will be saved as “Facebook” communication options
- Twitter profile pages will be saved as “Twitter” communication options
- LinkedIn, Google+, Youtube, Instagram, SlideShare, Pinterest profile pages will be saved as “Web” communication options.

To run the search again, click

in the search window. You can change the number of displayed communication options for each type.

Account data enrichment from the open Internet sources FAQ

Data enrichment cannot find account information. Why?

Data enrichment function searches account information in open sources. The list of the sources is confidential. If the search does not return any account information, please try the following:

- Ensure that the data enrichment function is properly configured in your Creatio.
- Ensure that the account name matches the corresponding company name.
- Add at least one company website in the [*Web*] field of the account page. Ensure that the specified website address is correct.
- Specify the company email.
- Check the [*Social links enrichment limit*], [*Phone number enrichment limit,*] and [*Email enrichment limit*] system settings. Their values must not be “0.”

If the problem persists, the following may be the case:

- There is no information about the company in the open sources, or Creatio could not find the company based on the entered data. Please contact Creatio support and send a list of companies that cannot be found. We will use this information to improve the data enrichment function.
- Creatio was unable to find new information. All information obtained through data enrichment is already available in the account profile.

New Creatio versions will use more sources and better search algorithms for data enrichment.

Why does the list of found data contain invalid values?

Creatio searches information in unstructured data from open sources using AI-like algorithms that can process unclear data. As a result, the data enrichment window may contain invalid communication options. We recommend reviewing the data enrichment results before saving them in the account profile.

The data search and recognition algorithms will be perfected with each Creatio update.

How do I limit the number of records in the data enrichment window?

Open sources may contain dozens of communication options for certain companies, such as emails from different departments, branches, and offices. Use the following system settings to limit the number of different types of communication options displayed in the data enrichment window:

- [*Social links enrichment limit*]
- [*Phone number enrichment limit*]
- [*Email enrichment limit*]

By default, each limit is set to “10.”

To change the limit:

1. In the system designer, open the [*System settings*] section.
2. Go to the [*Creatio cloud services*] → [*Data enrichment*] folder and open the needed system setting.

3. In the [*Default value*] field, enter the maximum number of communication options to display in the data enrichment window.

As a result, Creatio will limit the number of communication options of this type displayed in the data enrichment window.

Receive account information from Facebook

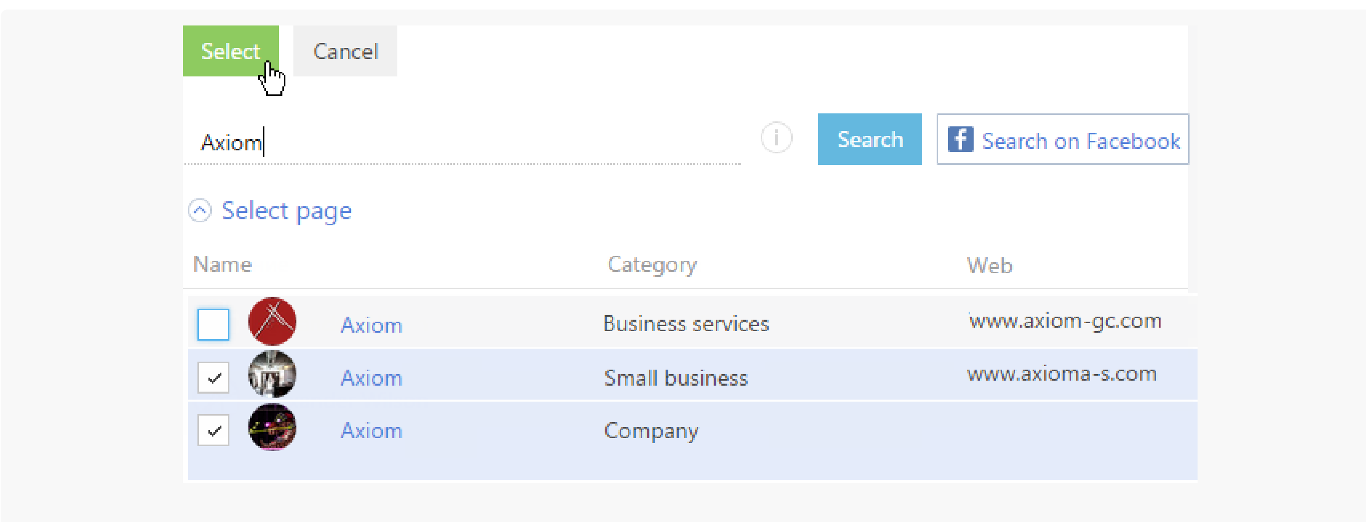
Integration with Facebook allows you to maintain the information about accounts stored in the system.

Run the [*Update with social networks data*] action to receive additional information about an account. To run the action, specify the Facebook account on the [*Communication option*] detail of the Creatio account page.

Connect an account to its Facebook profile

1. On the account page, expand the [*Communication options*] detail and click the button.
2. If you have not used Facebook integration before, the Facebook authorization window will open after you click the button.
3. To add one more communication option with the “Facebook“ type to the existing ones, click [*Add*] → [*Social networks*] → [*Facebook*].
4. The displayed Facebook page will contain a list of public pages that meet the search criteria. You can change the search criteria or enter the link to the account page on Facebook if it is known.
5. Select Facebook accounts to add to the detail (Fig. 2).

Fig. 2 – Selecting the public pages of a Creatio account

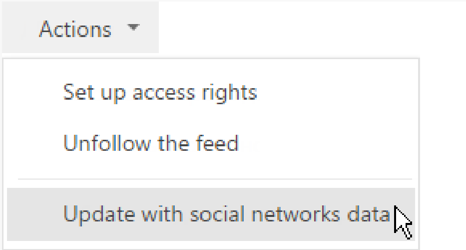


As a result, a new record with the “Facebook“ type will be added to the [*Communication options*] detail.

Populate the account page with Facebook information

1. On the account page, expand the [*Communication option*] detail. Make sure that the detail contains the needed Facebook pages of the account.
2. Select the [*Update with social networks data*] option from the [*Actions*] menu (Fig. 3).

Fig. 3 – Selecting the [*Update with social networks data*] action

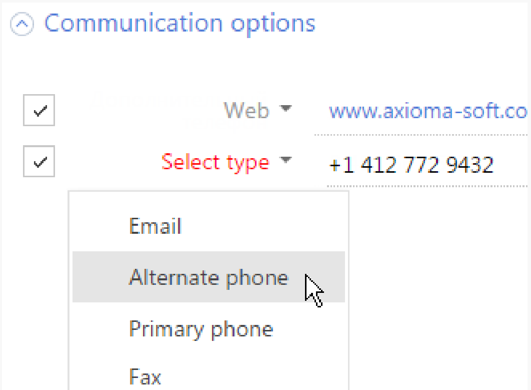


The displayed page will contain the account data stored in Creatio and the information from all Facebook public pages that are specified on the [*Communication options*] detail of the account page.

3. Analyze and select the data to add to the existing account information:

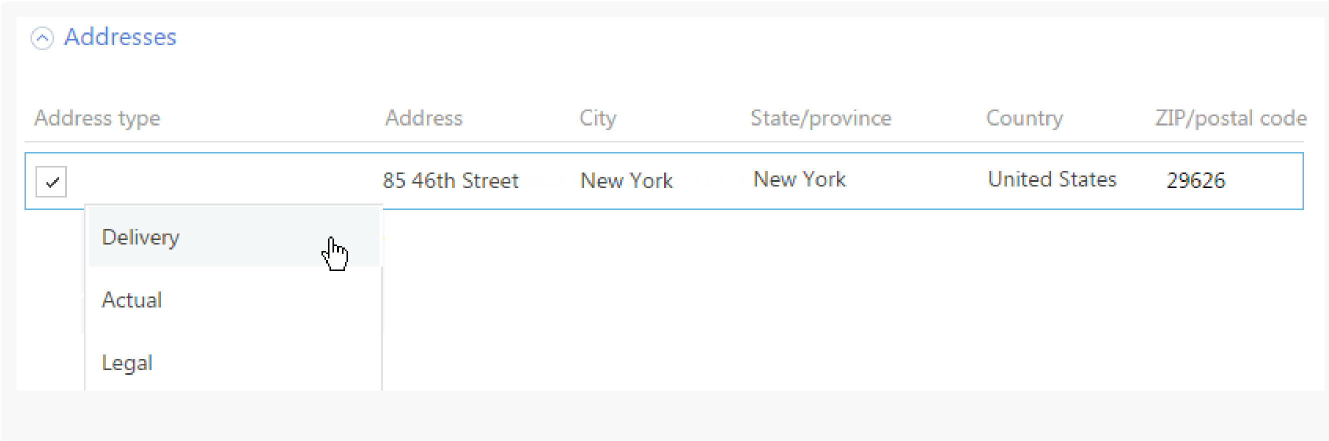
   a. On the [*Communication options*] detail, select the communication options to be saved in Creatio. To add a phone number, specify its type, for example, “Primary phone“ or “Extension number“ (Fig. 4).

   Fig. 4 – Selecting a communication option type

   b. On the [*Address*] detail, enter the value in the [*Address type*] field. If necessary, edit the following fields: [*City*], [*State/province,*] and [*Country*] (Fig.5). Select the addresses to be saved in Creatio.

   Fig. 5 – Selecting an address type



4. Edit the information on the [*Noteworthy events*] detail by specifying the event type, for example, “Company foundation day.“
5. If necessary, edit the [*Notes*] detail.
6. After you edit and save all the needed data from Facebook, click the [*Save*] button on the page.
   As a result, the information will be added to the corresponding page details.

Attention. On the population page, if you deselect the information that has been previously added to Creatio, this information will be deleted from the account page after the data population is completed and the changes are saved.

Fields completed in Creatio from a Facebook page

Let's review the list of fields that can be filled in in Creatio based on the data from Facebook. Fields of the public page that can be mapped to the Creatio fields are located on the [*About*] tab of the Facebook public page and are described below.

Facebook field	Creatio field
Website	The website is saved on the [*Communication options*] detail.
Phone	To save a phone number, in Creatio, specify its type, for example, “Business phone“ or “Mobile phone.“ Saved on the [*Communication options*] detail.
Email	Email. Saved on the [*Communication options*] detail.
Start Date	The start date is saved on the [*Noteworthy events*] detail.
Address	The address. is saved on the [*Addresses*] detail.
Short Description	Notes are saved on the [*Attachments and notes*] in detail.